OSC Training | WF220

Developing Guardians of North Carolina's Data

NORTH CAROLINA OFFICE OF THE STATE CONTROLLER

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North Carolina Office of the State Controller

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INTRODUCTION

Overview

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Prerequisites

There is one prerequisite you must take before attending this course. Attending this prerequisite ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the SAP Workflow for Approvers course.

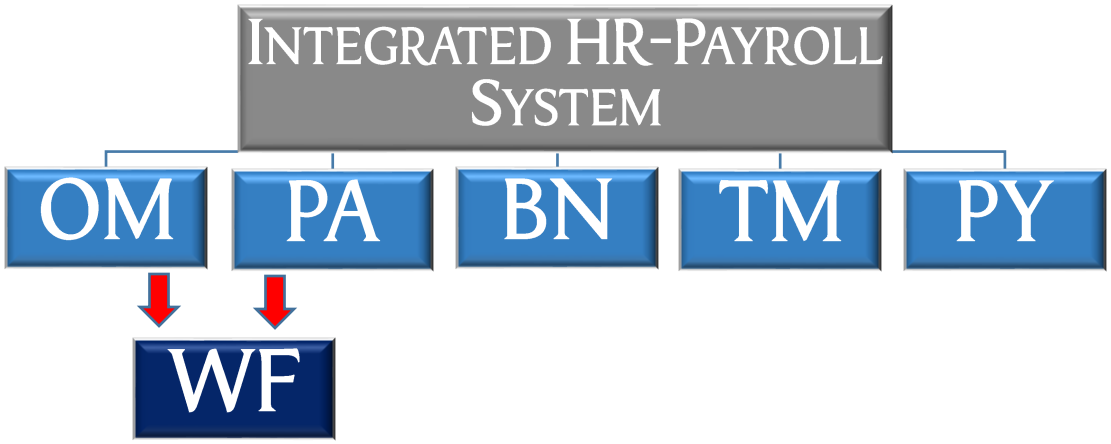
- Personnel Administration Terms Concepts and Display Data (PA210)

Post-requisites

There is one post-requisite you may consider taking if you are interested in Workflow Reporting.

- Business Objects Reporting - (BOBJ410)

Integrated HR-Payroll System Training Curriculum



The Integrated HR-Payroll System training program comprises several courses and different modules.

Strategy for Training

TELL ME (Concepts)

Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

SHOW ME (Demonstrations)

Instructor will demonstrate job-related tasks performed in the Integrated HR-Payroll System – HANDS OFF.

LET ME (Exercises)

Student will complete the exercises which allows for hands-on practice in class – HANDS ON

SUPPORT ME (Availability)

Instructor will be available to answer questions while the students complete the exercises

Course Map

You can see the Course Map of the class at the beginning of each lesson. The bolded and larger text indicates which lesson you are beginning.

The lessons covered in this class include:

- Lesson 1: Workflow Overview
- Lesson 2: Accessing and Navigating Workflow Inbox and Outbox
- Lesson 3: Approving OM Workflow PCRs
- Lesson 4: Approving PA Workflow PCRs
- Lesson 5: Workflow Reporting & Troubleshooting
- Lesson 6: Course Review

The SAP Workflow Student Guide can be used as a reference when you return to the workplace.

Course Objectives

Upon completion of this course, you should be able to:

- Explain the Workflow process for Organizational Management (OM) and Personnel Administration (PA)
- Identify key differences in the routing of Workflow (WF) items in OM and PA
- Access, navigate and complete items within the Workflow Inbox
- Use Key features to manage OM/PA Workflow Items
- Execute reports

Reference Materials

- Student Guide
- Job Aids
- Other Resources
  - Training HELP website
  - Online help - from the SAP portal
  - Work instructions - Business Process Procedures (BPPs)

The material listed above can accessed through the OSC Training HELP website:
http://osc.nc.gov/state-agency-resources/training

SUMMARY

This course is intended to give HR professionals an understanding of the Integrated HR-Payroll System OM and PA Workflow processes. This course will provide you with demonstration and practice for approving OM and PA workflows.

LESSON 1: WORKFLOW OVERVIEW

Objectives

- Explain the purpose of Workflow
- Define key Workflow terms
- Identify key changes in the approval process
- Describe the differences between the OM and PA Workflow process

Purpose of Workflow

Workflow provides an electronic approval process for Position and Personnel Actions at various levels:

- Division/Agency
- Funding
- OSHR
- OSBM

Workflow also gives users the ability to create, track and approve Workflow items.

🗁 **NOTE**: WF is the acronym for Workflow.

Key Terms

Action This term is used in both PA and OM to indicate a new position/employee or change to an existing position/employee.

Documents A documents option is contained in both the Inbox and Outbox. Documents are the Integrated HR-Payroll System's way of tracking all transactions that take place within the system. You will not use documents very often.

Initiator The OM or PA user who enters the data for either an OM or PA Action. In PA, the Initiator will ultimately enter the data for the Action into the employee's Integrated HR-Payroll System personnel record.

Routing Tables Both OM and PA have a custom table created for the State of North Carolina within the Integrated HR-Payroll System to hold the list of actions/reasons and logic to support the approval process for positions and employee. The table identifies which Action goes to which approval level.

PCR A Personnel or Position Change Request (PCR) is a number assigned to each Workflow item. The PCR can be used to identify and track a Workflow item.

Workflow Tracker A link that will show you the name of the Step, Status, Result, Time & Agent for each Workflow item. The Workflow Tracker shows who initiated, who approved, and who the next approvers are in the process.

Workflow Header Displays the data that was entered by the Initiator for the Workflow item. The Workflow Header answers this question, "What data was used to execute this Workflow item?"

Workflow Log A more detailed view of the individual steps the document goes through within the Workflow process (detailed Workflow Tracker). The Workflow Log answers the question, "Who has the Workflow item in his/her inbox?"

Approver Several positions are assigned with approval status at various levels within the organization. The security access assigned to the position determines if the position holder has approval authority for PA, OM, FI or all three. The authority to approve belongs to the position, not the person holding the position. When the person leaves the position, he or she may no longer have approval authority.

Generally, there are at least two Approvers assigned to each level in an agency or division so that when the Initiator executes Workflow, the PCR is sent to the Inbox of all the Approvers at that level. This allows the approval process to continue if one of the Approvers is out of the office for a period of time.

Substitutions Agencies can have a substitute assigned when an individual is out. The Agency must submit a request to BEST Shared Services. The user that is substituting must have the same security role(s) as the one for whom the user is being substituted. The Substitute will see all the items in the Inbox of the individual for which he or she is substituting.

Integrated HR-Payroll System Workflow Process

OM Workflow Process	PA Workflow Process
Notes and documents should be included/attached in the Services for Objects section of the PCR	Notes and documents should be included/attached in the Services for Objects section of the PCR
Agency Funding Approval is the first approval level for most OM PCR's	Agency funding approval is last approval level for most PA PCR's
PCR #s begin with 5 (5000000000)	PCR #s begin with 1 (1000000000)
After the PCR has been through the entire approval process it does not return to Initiator	PCR returns to Initiator to explicitly complete the Workflow after processing action
BEST completes the final step to activate OM actions	After the PCR has been through the entire approval process, it returns to the Initiator to explicitly complete the PCR and work the Action.
OSBM is an automatic step in the process when applicable	

Services for Objects

The Services for Objects option allows notes and attachments (Word, Excel, Notepad) to be included with the Workflow PCR. All Approvers at the next levels (unless marked private) can view the notes or attachments. Only the creator of the private note can view it.

Funding Approver in the Workflow Process

When the OM Initiator executes OM Workflow, the first approval level in the Integrated HR-Payroll System is the Agency Funding Approval (Budget Approval). The Funding Approver is the last approval level for most PA PCRs.

OM Workflow Process

During Workflow, the infotypes on the positions are in Planned Status.

1. When the Initiator executes OM Workflow, the first approval level in the Integrated HR-Payroll System is the Agency Funding Approval (Budget Approval).
2. OSBM approval is a step in the Integrated HR-Payroll System new position Action Workflow process; therefore, it is not necessary to have OSBM approve the funding of a position in a separate form prior to creating the new position (establish position action). OSBM Funding Approval is not required if creating new positions as temporary.
3. After all approvals are final, the OM Workflow item is sent to BEST. They move the position from Planned status to Active status.

PA Workflow Process

1. The Initiator (Agency) initiates the PCR (Personnel Change Request) and completes the final step after the PCR has been through the entire approval process.
2. The Agency Funding Approver is the last approval step for most PA PCRs.

Workflow Approver Relationships

The list below shows the different levels that an OM or PA Action may be sent for approval. The OM/PA Routing Tables were set up to determine how the PCR is routed. You will see the following code acronyms when viewing the Workflow Tracker.

OM Workflow Approver Relationships	PA Workflow Approver Relationships
FA1 - Funding Approver	**DA1** - Division Approver
BA1 - OSBM Approver	**AA1** - Agency Approver
DA1- Division Approver	**OA1** - OSHR Approver
AA1 - Agency Approver	**FA1** - Funding Approver
OA1 - OSHR Approver	
SOM - Shared Services	

- **NOTE:** OSBM approval is required only for New Position Action (100).
- **NOTE**: OSHR is not an automatic action in the OM Workflow process. The PCR must be manually sent to OSHR.
- **NOTE**: PA Workflow does have some reasons that will automatically be sent to OSHR. See those reasons which are detailed in the *PA Actions Reason Definitions* job aid. For those reasons that are not automatic submissions to OSHR, the Agency Approver (AA1) must manually click the Send to OSHR button.

KNOWLEDGE CHECK

QUESTION	ANSWER
1. The ___ is the OM or PA user who enters the data for either an OM or PA Action.	
2. The ___ shows who initiated, who approved and who the next approvers are in the process.	
3. The ___ answers the question "Who has the Workflow item in their inbox?"	
4. The ___ can be used to identify and track a Workflow item.	
5. Workflow approval security is assigned to the ___.	
6. The Funding approver's place in the Workflow Approval process in OM is usually ___.	
7. The Funding approver's place in the Workflow Approval process in PA is usually ___.	
8. Approval by ___ in the OM Workflow is necessary for new permanent positions to be created.	

SUMMARY

In this lesson, you learned to:

- Explain the purpose of Workflow
- Define key Workflow terms
- Identify key changes in the approval process
- Describe the differences between the OM and PA Workflow process

LESSON 2: ACCESSING AND NAVIGATING WORKFLOW INBOX AND OUTBOX

Objectives

- Access Workflow Inbox in transaction code SBWP
- Use the different Folders and options in Inbox and Outbox
- Identify the Workflow Item Statuses
- Open a Workflow Item
- Review the Workflow Log
- Use the Workflow Tracker
- Use the Workflow Header

* *

EXERCISE 2.1: Logging on to the Integrated HR-Payroll System

SCENARIO

You need to log on the Integrated HR-Payroll System training client so that you can complete course exercises. You also need to add the transactions you will use in class to your Favorites folder.

Instructions

Use the steps and data presented below to log into the training client in the classroom.

You will log in as the AGENCY APPROVER.

1. Access the Integrated HR-Payroll System portal.

   http://osc.nc.gov/state-agency-resources/training

2. Enter the **User ID** and **password** that is assigned to your classroom PC.
3. Click on the **Log on** button.
4. Click **Yes** to confirm the security message displayed.

5. Click the **SAP GUI** tab.
6. Click the **training client** specified by your instructor. The SAP Easy Access screen is displayed.
7. Maximize your screen by clicking on the **Min/Max** icon  in the upper right-hand corner of the screen.

Now we will create Favorite links for the transactions we will use in class.

8. Right-click on **Favorites**.
9. Select **Insert transaction** from the list. A dialog box is displayed.
10. Enter **PA30** in the text box.
11. Click the **green check mark** to close the box and add the transaction to your Favorites list.
12. Repeat steps 8-11 to add the following transactions to your Favorites list.
    - PO13
    - ZPA0189
13. Stop when you have added the transactions.

You must enable your technical settings to be able to display the transaction codes on your screen.

14. Select **Extras > Settings** from the menu at the top of the screen to display the settings dialog box.
15. Click the **Display technical names** checkbox.
16. Click the **Continue (Enter)** button. The transaction codes will now display in the menu tree.

Now add a URL to SAP Easy Favorites for the OSC Training HELP web page.

17. Copy the web address as indicated by your instructor for the OSC Training HELP page.
18. Right-click on **Favorites**.
19. Select **Add other objects** from the list. A drop-down list is displayed.
20. Click **Web address** or file from the list. A pop-up box dialog displays.
21. Enter a **title** for your web page in the Text field.
22. Paste the web address you copied in step 17 for the OSC Training HELP page in the **Web Address** or **File** field.

23. Click the **Continue** button at the bottom right-hand corner of the box. The URL has been added to the SAP Favorites folder.

24. Click the URL to access the website you just added.

* *

EXERCISE 2.2: Workflow Overview and Navigation

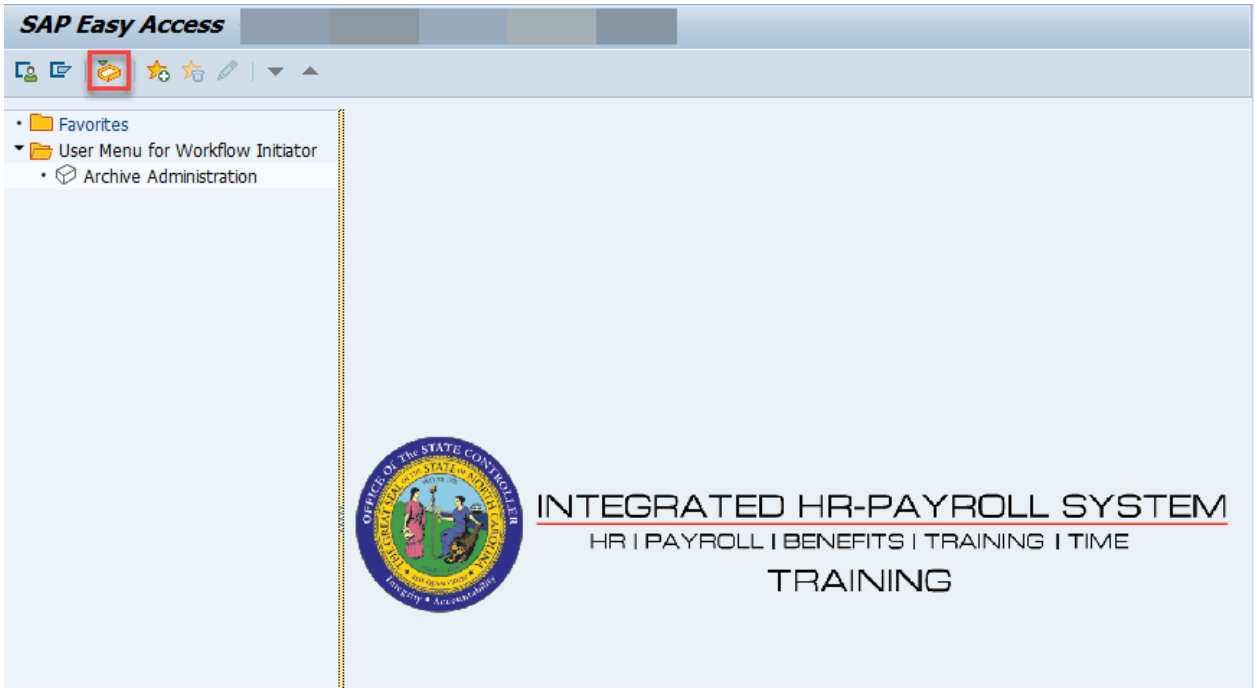
SCENARIO

Follow with your instructor as he/she directs you through the navigation and discovery of the Workflow Inbox.

Instructions

You are currently on the SAP Easy Access screen.

Accessing and Navigating the Workflow Inbox (SBWP)

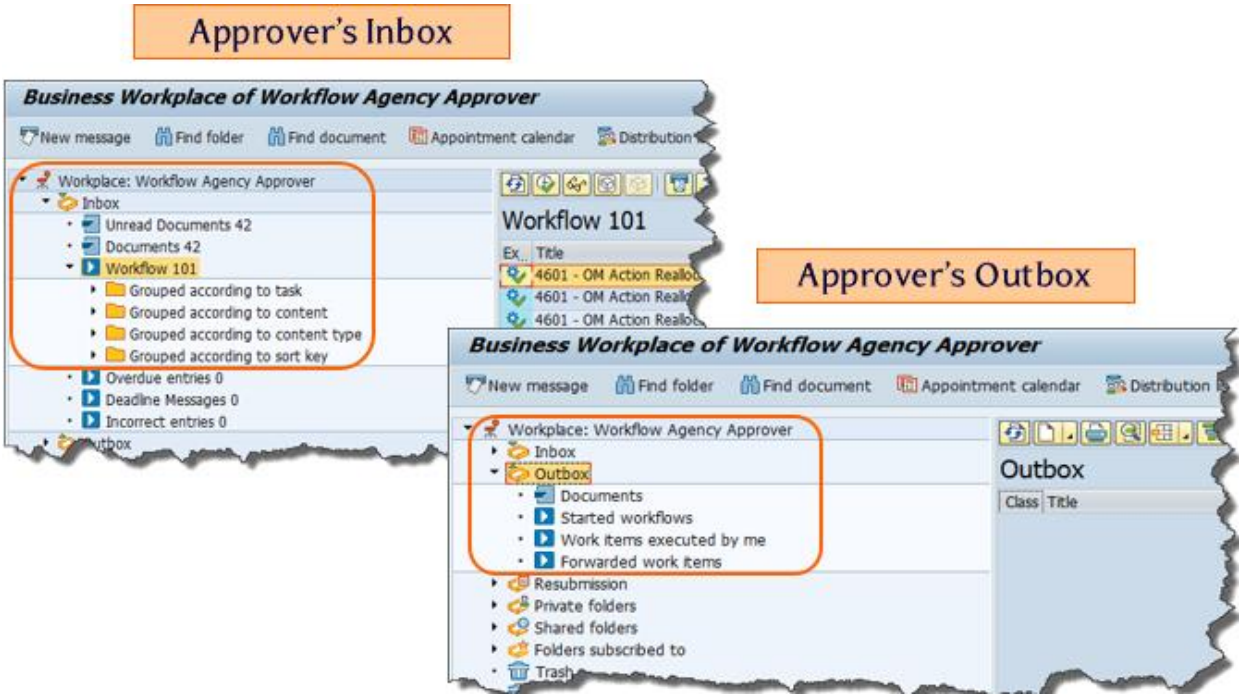


An Approver accesses the Workflow PCRs that have been sent for him or her to take action on via the Workflow option in the Inbox.

The Inbox is accessed either from the Easy Access screen using the Business Workplace button or by entering SBWP in the Command field.

1. Click the **SBWP** button to access the SAP Business Workplace.
2. Click the node in front of **Inbox**.
3. Click the **Workflow** folder.

Options in the Workplace



The Workplace is organized by folders. You will mainly use the Inbox and Outbox folders.

Both the Inbox and Outbox have **Documents**. As noted previously, the system creates a document for every entry made, like an audit trail. Documents are informational only.

Inbox

Workflow: This option will hold all the Integrated HR-Payroll System Workflow PCRs that have been sent to you and all Approvers at your approval level for processing.

The following Inbox options are not being used:

- Overdue entries
- Deadline Messages
- Incorrect entries

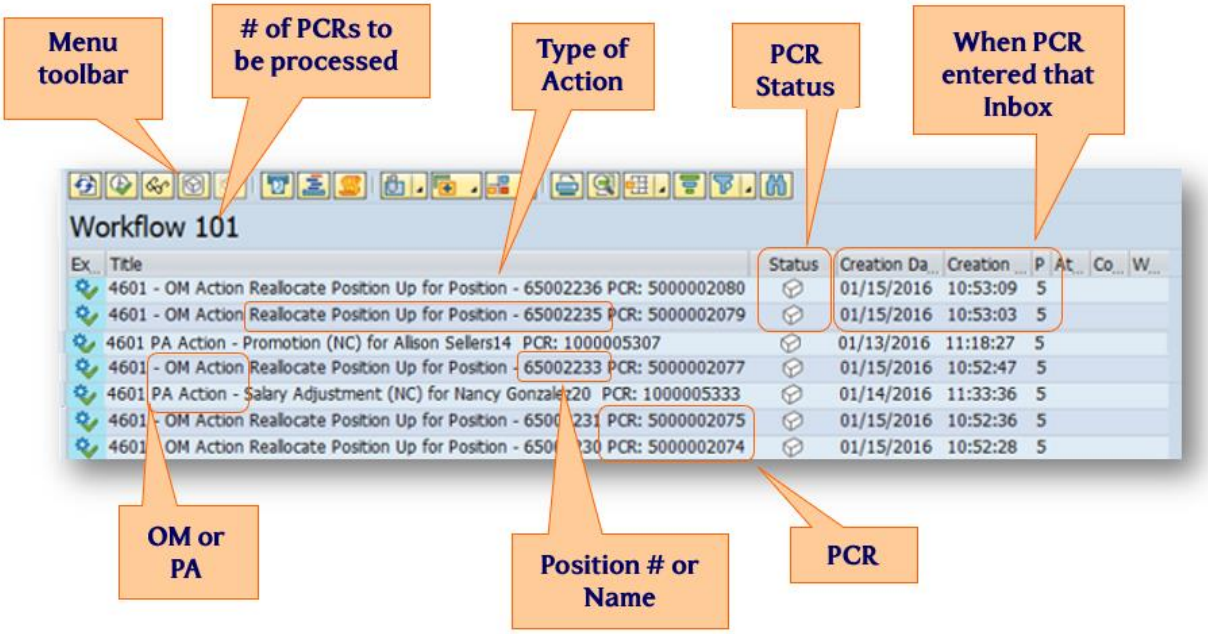
4. Click the node in front of **Outbox**  .

Outbox

- *Started Workflows*: This folder includes Workflow items for which you were the Initiator.
- *Work items executed by me*: Work Items that you have processed by either approving or returning to the Initiator.
- The *Forwarded work items* Outbox option is not being used.

5. Click the node in front of **Inbox**  and then the **Workflow** folder.

The Workflow Inbox



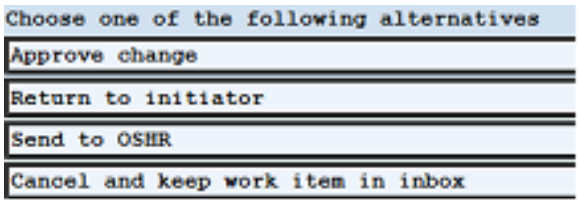
Workflow Status

A graphical icon shows the status of a PCR at a glance. There are four possible statuses for a PCR:

Ready  The PCR is ready for an Approver to take action.

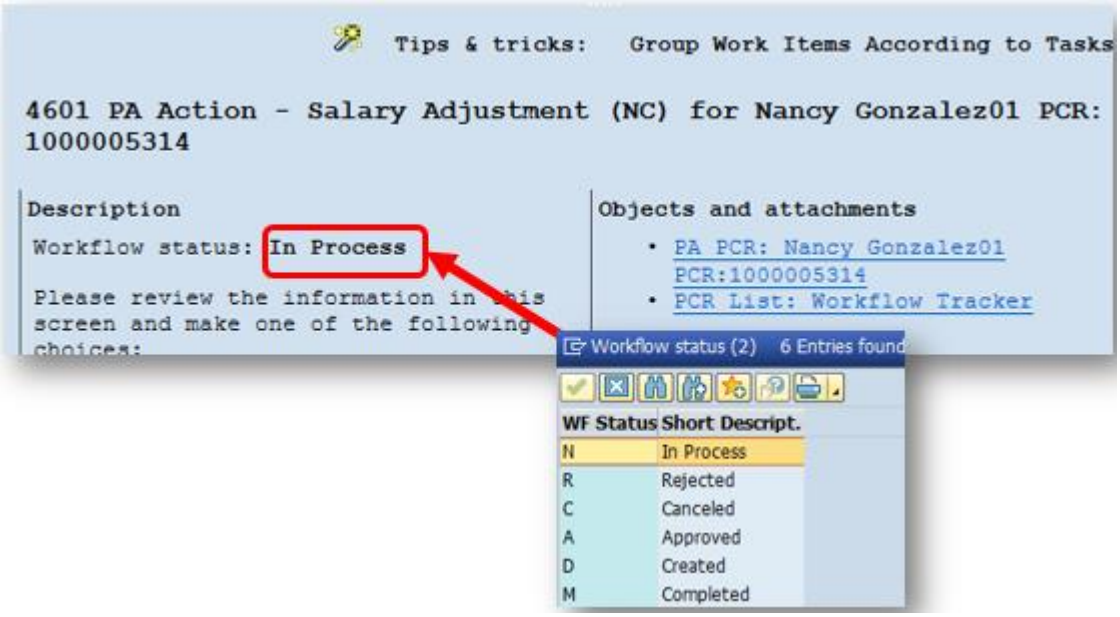
Reserved  The PCR has been reserved by an Approver which removes the PCR from the Inbox of all other Approvers at that level. The PCR is displayed only in the Workflow inbox of Approver who reserved it.

In process  **In Process** or **Executed**: The PA PCR is awaiting a specific confirmation of its completion which is required. If an Approver has double-clicked a PA PCR and selected the option to *Cancel and keep work item in inbox*, the PCR will reflect the Executed status. This simply means the item has been viewed. When the Approver is ready to take action on a PA PCR with an Executed status, they can double-click on the PA PCR and perform one of the tasks shown displayed in the screen print below.



Completed  The execution of the PCR is completed and is no longer displayed in the Workflow inbox of the Business Workplace.

Workflow Status – In Process



After a PCR has been saved, but not yet submitted to Workflow, the system-generated status is set to **D** for Created.

After an Initiator initiates Workflow, the status is updated to **N** for in process.

After an Approver approves the PCR, the status is set to **A** for approved and will remain at A for all approval levels unless an Approver returns (rejects), reserves, or cancels the PCR.

When an Approver returns (rejects) a PCR, the status is changed to **R** for rejected. The PCR is automatically sent back to the Inbox of the Initiator.

If the Initiator cancels the Action, the Workflow status will change to **C** for cancelled.

For OM Actions, after BEST Shared Services processes the approved PCR, the status is changed to **M** for completed.

For OM, if an Action is rejected, BEST Shared Services processes the cancelled Action. This changes the OM Action in planned status to rejected status, and the Workflow status is changed to **M** for completed.

6. Hover over the status "brick." An electronic "sticky note" will display the status.
7. Listen while your instructor explains the purpose of this button.
    - If you double-click a PCR and do not plan to process it, "replace" it by clicking the status brick.

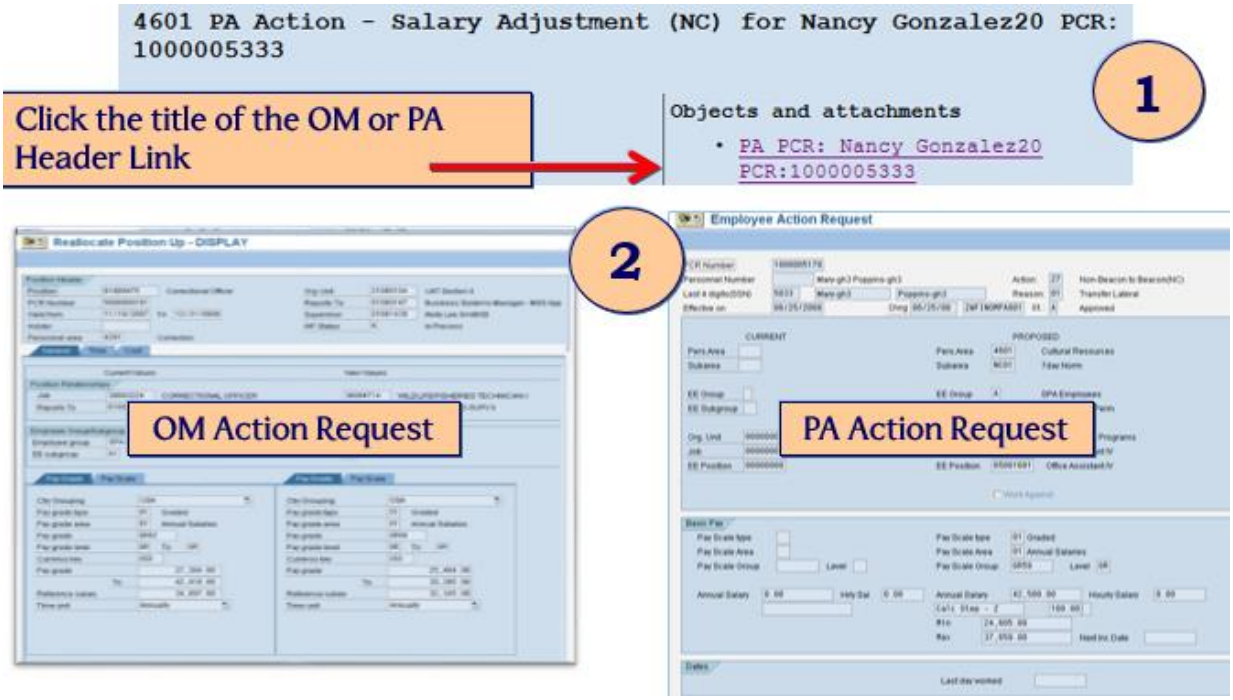
8. Hover over one of the Salary Adjustment Action PCR for Nancy Gonzalez.

   A. What is the status of the PCR? _____

Display and Use the Workflow Header

9. SINGLE-click the PA PCR at the bottom right section of the Workflow Inbox (just above the Workflow Tracker).

   The Employee Action Request screen you completed to initiate the Workflow Process is now displayed.



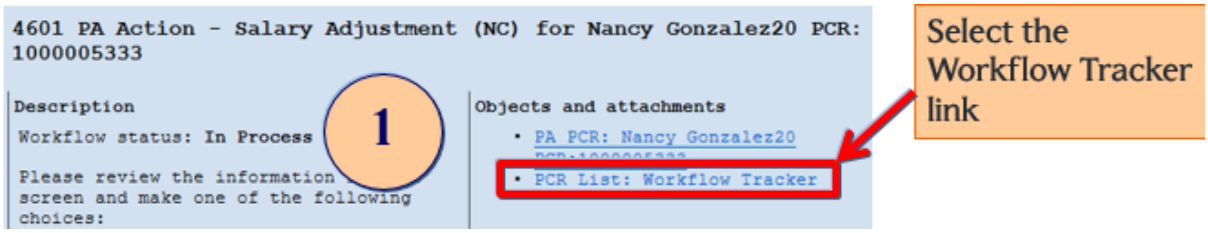
When you receive a PCR in your Inbox, you should review the OM or PA Action prior to approving or returning it. Click the link for the Header to access the Action screen to see the data that was entered for the PCR.

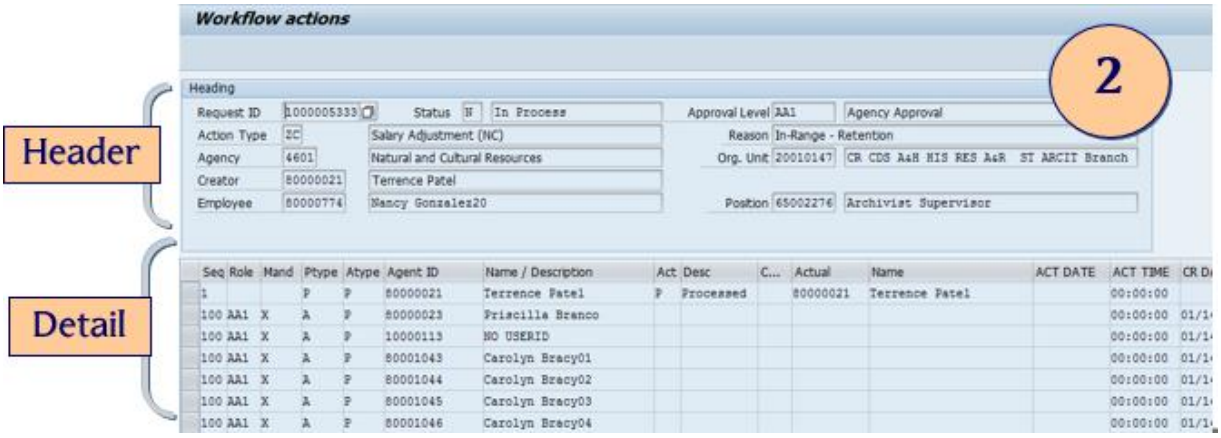
By using the Header, you can also access the Services for Object button to see any notes or attachments that were sent with the PCR.

10. Click the Back button to return to the Workflow inbox.

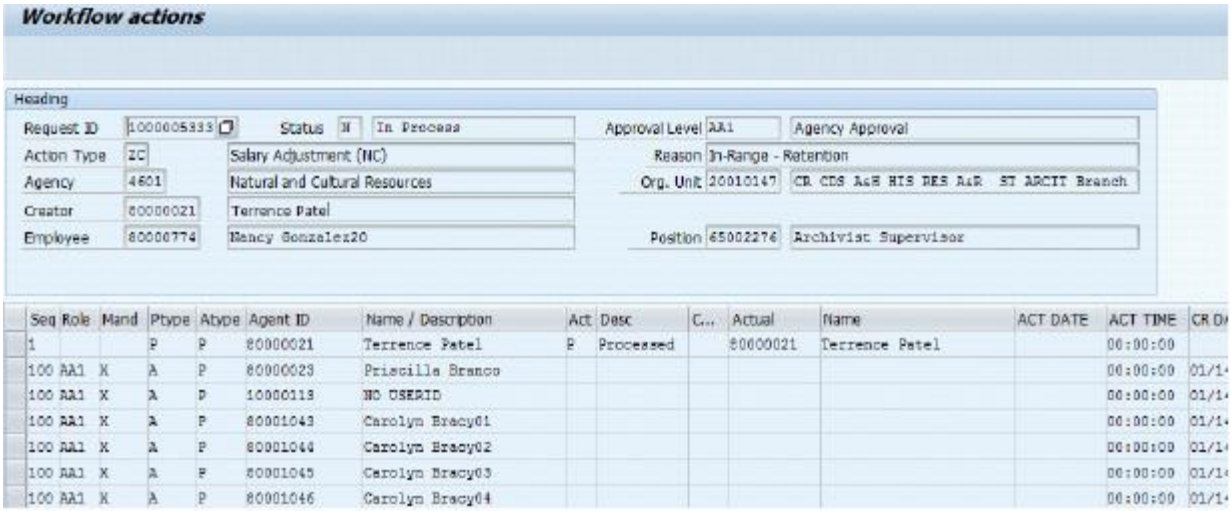
Workflow Tracker

11. SINGLE-click the **PA Action - Salary Adjustment for Nancy Gonzalez** (as assigned by your instructor).
12. SINGLE-click the **Workflow Tracker** at the bottom right of the screen. (See example #1 below.)





The Workflow Tracker is a link in the bottom right of the Inbox or Outbox screen (you may have to scroll to see it). Using Workflow Tracker, you can see which Approver has processed the PCR, the action the Approver took, and where the PCR is being routed next.



The Header section of the Tracker will show, at a minimum, the following fields:

- Request ID (PCR Number)
- Action type (code and name)
- Status (the overall status of the work item
- Creator (Initiator)

In addition, the header will include specific fields pertinent to either the PA or OM Action (like employee name or position number).

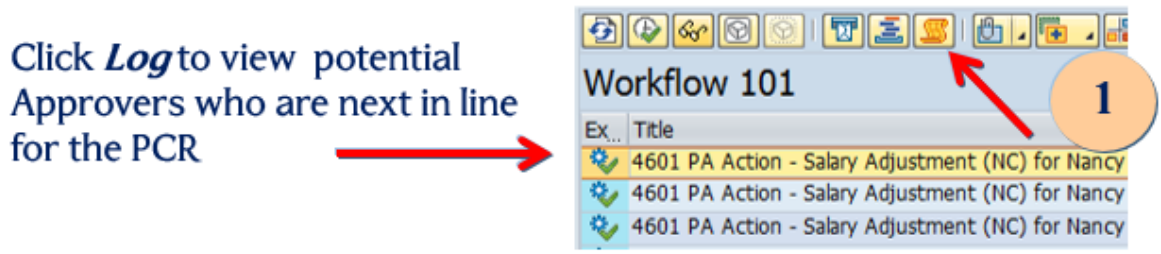
The Detail section of the Tracker will list these attributes:

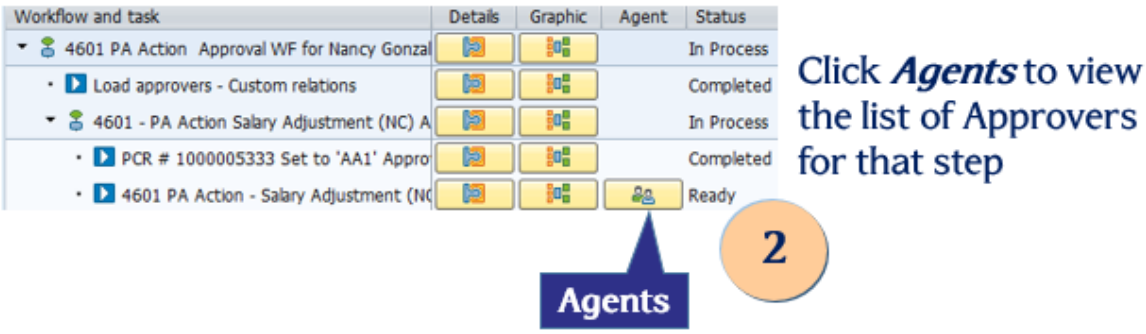
- **Sequence** (line item sequence)
- **Role** represents the approver relationship.
  - FA1 Funding Approver
  - DA1 Division Approver
  - OA1 OSHR
  - AA1 Agency Approver
  - SOM Shared Services
  - BA1 OSBM
- An **X** in the **Mandatory** column indicates that the approval of the specific Approver is required.
- **Ptype** is used to signify the Processor (P) and Approvers (A).
- **Agent ID** represents the Personnel number of the Approver.

- **Name/Description** lists the name of the Employee.
- **Act/Desc** holds value (P) Processed.
  - A = approved
  - R = rejected
  - P = processed
- An **X** in the **Cmnt** column will indicate if a rejection note has been created for the PCR. To see the comment, highlight the line and click the Notes icon (eyeglasses).
- **Actual/Name** is the Initiator's Personnel number and name.

13. Click the **Back** button to return to the Workflow inbox.

Display the Workflow Log



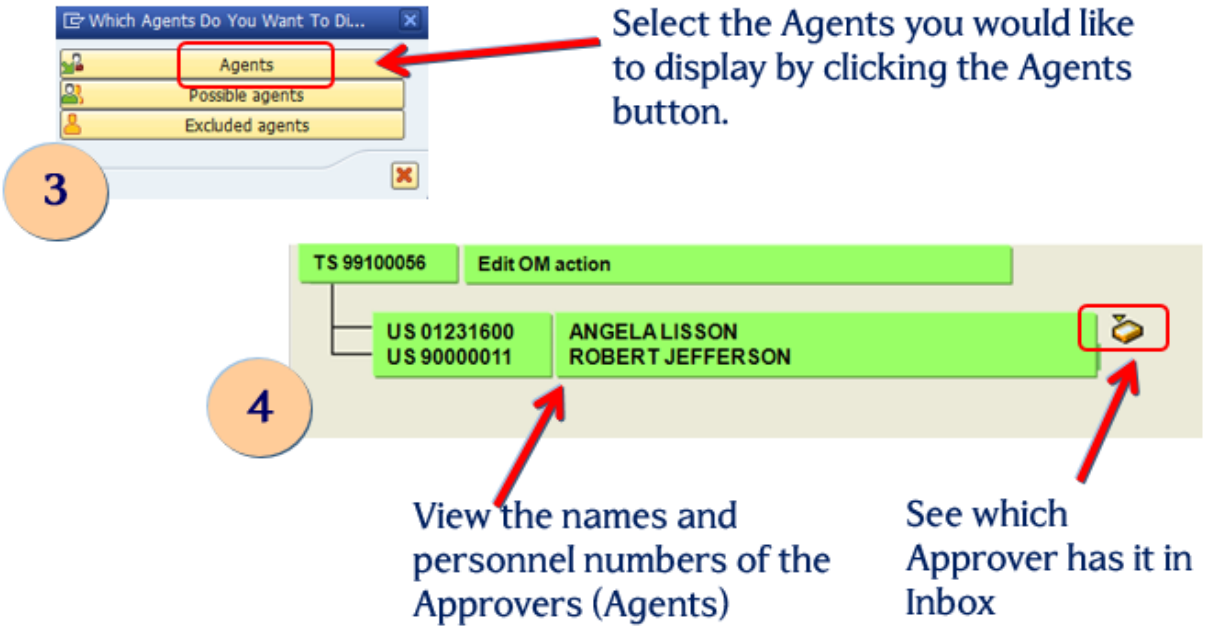


14. SINGLE-click the **PA Action - Salary Adjustment for Nancy Gonzalez** (as assigned by your instructor).
15. Click the **Log** button as identified above. This will allow you to view potential Approvers who are next in line for the PCR.

The Workflow Log is a document within Workflow that contains the Step, Status, Result, Time and Agent. The Workflow Log answers the question, "Who has the Workflow item in his/her Inbox?"

After you select the Log option, the next screen displays the various results for each step. In addition, the Agents option is displayed. Click the Agents icon to view the list of the Approvers for that step.

Once you approve a PCR and want to obtain a list of possible approvers, you can look at the log from your outbox.



16. Click the **Agents** button to view a list of Approvers for the <u>READY</u> status.
17. Click the **Agents** Agents button on the pop-up box view the possible approvers available to approve this workflow.

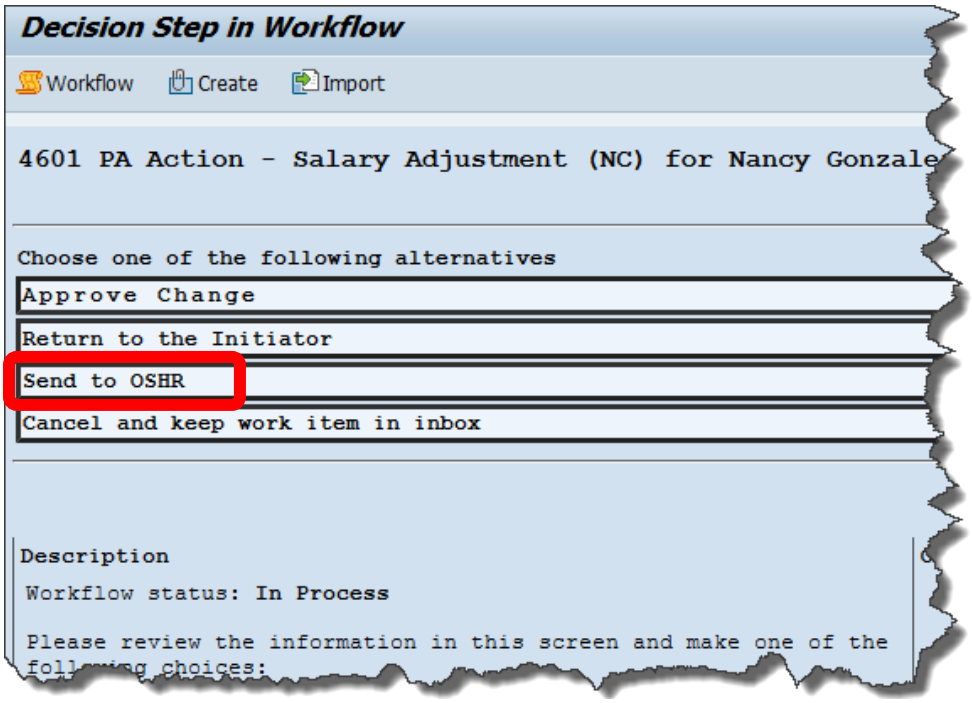
The Workflow Log illustrated above (not the same as on your screen) indicates that this Work Item has two possible Approvers at this level: Angela Lisson or Robert Jefferson. The list of approvers on your computer screen may look different than the example above.

18. Click the **red X** to close the pop-up box.
19. Close the Click the **Back** button to return to the Workflow inbox.

STOP: DO NOT DO THE FOLLOWING STEPS. Watch as your instructor demonstrates the next two functions.

Routing to OSHR

Watch as your instructor demonstrates the Routing to OSHR option.



The **Send to OSHR** option on the Decision Step in Workflow screen is only available for the *Agency Approver's* screen.

🗁 **CRITICAL NOTE**: Routing to OSHR is <u>not</u> an automatic part of the process. If a PCR needs to be sent to OSHR, the Approver must click the *Send to OSHR* option. The Send to OSHR option is only available at the Agency approval level (depending on Agency Delegation of Authority).

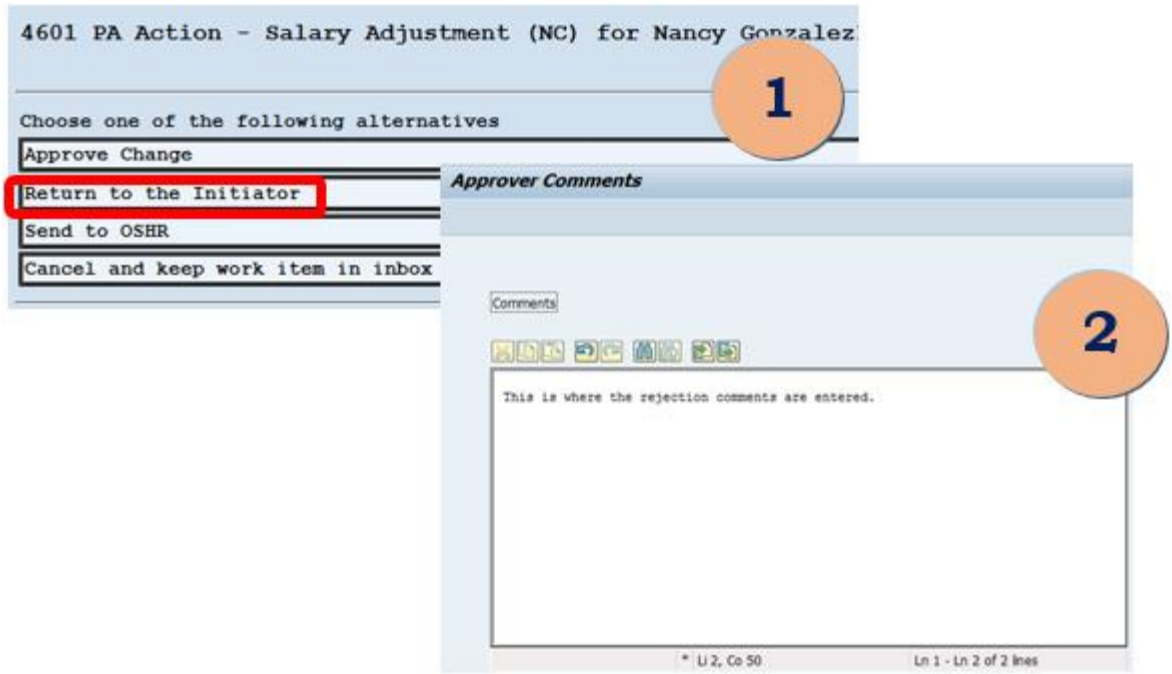
🗁 **NOTE:** PA has several reasons that are routed to OSHR. For further information, check the *PA Actions Reasons Definitions* Job Aid.

20. Listen only (<u>Do not click or process</u>) as the instructor explains the following features:

    - Approve Change
    - Return to Initiator
    - Send to OSHR
    - Cancel and Keep in Inbox

Workflow Status – Return to Initiator (Reject)

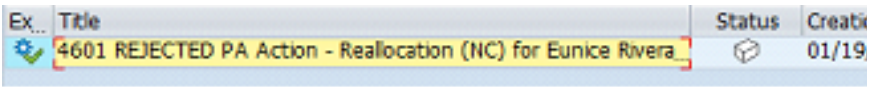
21. Watch as your instructor demonstrates the Return to Initiator option.



If an Approver clicks the *Return to initiator* option, a comments window automatically displays (this is not the same as the Services for Objects button). The Approver is required to write a note to the Initiator indicating why the PCR was rejected.

- **NOTE**: The rejected item will not display in the Initiator's Inbox, and the Approver will still see a comments work item in his or her Inbox until the comments are saved.
- **NOTE**: When creating approver comments, DO NOT click the Enter (green check) button. You only need to click the Save button to save the comments. If you click the green check or press the Enter key and then Save, the comments are lost.

The returned PCR is no longer in the Approver's Inbox, but is automatically returned to the Initiator. When the Initiator accesses the Inbox, the beginning of the PCR name displays REJECTED in all caps so that it is apparent that a PCR has been rejected.



22. SINGLE-click **Cancel and keep work item in inbox.** The screen redisplays the Workflow inbox.

23. Click the **Outbox > Work items executed by me** folder.
24. Return to the Workflow folder by clicking the **Workflow** folder.

Additional Resources

Refer to the OSC Training website in HELP documents for more information about OM and PA Workflow.

Search for the following job aids:

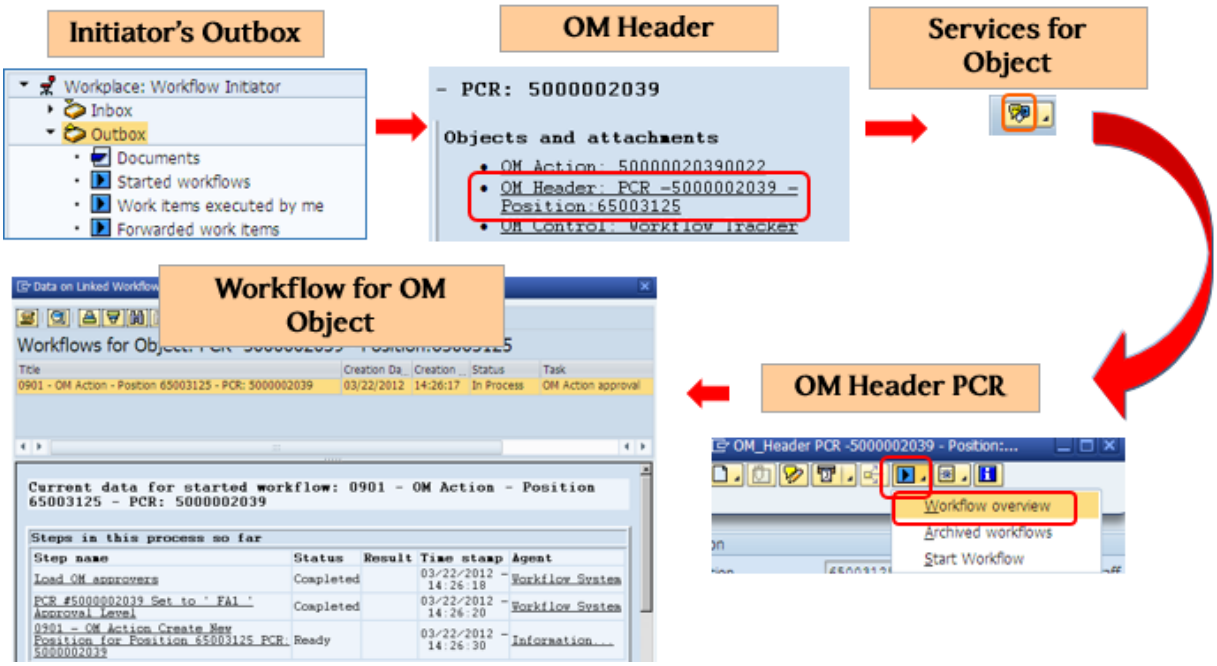
- *How to Locate an OM PCR*
- *How to Locate a PA PCR*
- *Business Workplace Button Functions*

25. Click the **Back** button to return to the Workflow inbox.

This exercise is complete.

* *

OM Workflow Status Overview



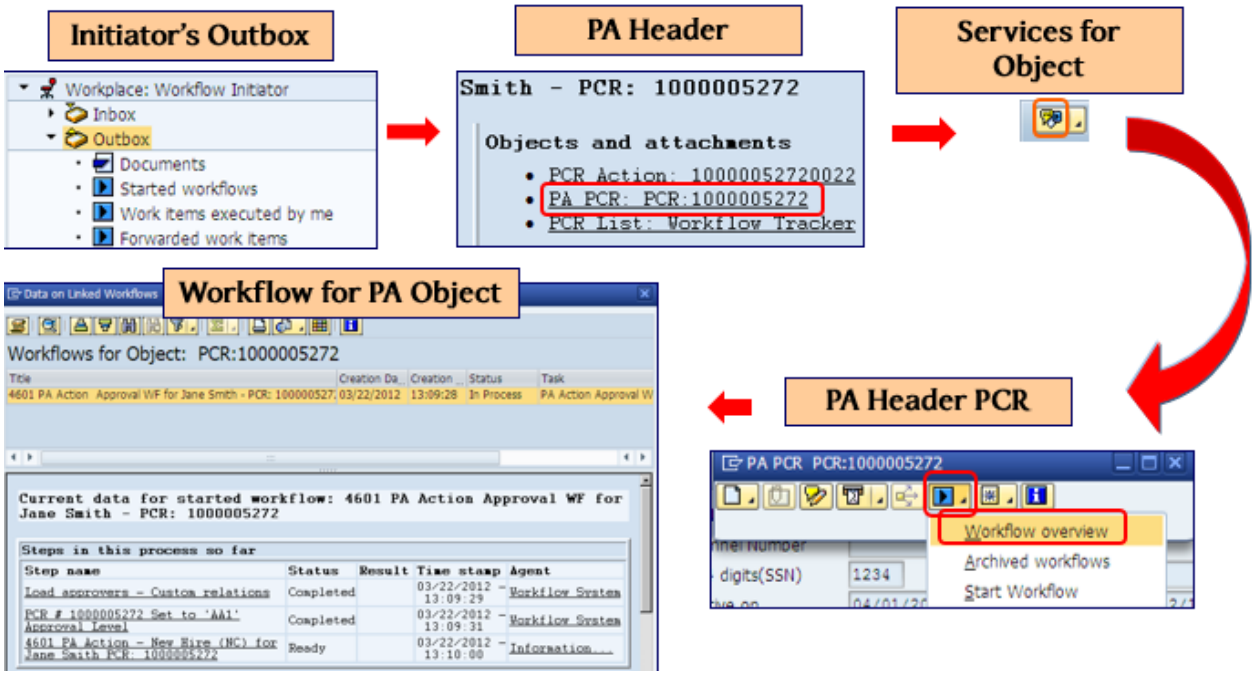
For the Initiator, there is an additional way to access the workflow status of an **OM** PCR.

The flowchart above shows how to access the Workflow for Object through the PCR located in the Initiator's Outbox in the SAP Business Workplace.

1. From the SAP Easy Access screen, click on the SAP Business Workplace button.
2. On the SAP Business Workplace, click the Workplace Outbox.
3. In the Outbox, SINGLE-click the PCR you want to display.
4. At the bottom right-hand area of the screen, SINGLE-click the OM Header. The OM Action (titled by action) screen is displayed.
5. Click the Services for Objects button to display the menu bar.
6. Click the following path: Workflow > Workflow Overview.

The workflows for this PCR are displayed by Step Name with the Status indicated next to it. Also displayed is the Time stamp indicating when the workflow step was completed.

PA Workflow Status Overview



For the Initiator, there is an additional way to access the workflow status of a **PA** PCR.

The flowchart above shows how to access the Workflow for Object through the PCR located in the Initiator's Outbox in the SAP Business Workplace.

7. From the SAP Easy Access screen, click on the SAP Business Workplace button.
8. On the SAP Business Workplace, click the Workplace Outbox.
9. In the Outbox, SINGLE-click the PCR you want to display.
10. At the bottom right-hand area of the screen, SINGLE-click the PA PCR. The Employee Action Request screen is displayed.
11. Click the Services for Objects button to display the menu bar.
12. Click the following path: Workflow > Workflow Overview.

The workflows for this PCR are displayed by Step Name with the Status indicated next to it. Also displayed is the Time stamp indicating when the workflow step was completed.

KNOWLEDGE CHECK

QUESTION	ANSWER
1. The ___ status is used when an Approver removes the PCR from the Inbox of all other Approvers at that level.	
2. For OM Actions, after BEST Shared Services processes the approved PCR, the status is changed to ___ for completed.	
3. Routing a PCR to the Office of the State Human Resources (OSHR) is not an ___ part of the process.	
4. The Send to OSHR option is available only at the ___ approval level.	
5. When an Approver rejects a PCR, they must ___ to the Initiator indicating why the PCR was rejected.	
6. On the Workflow Tracker, an X in the Cmnt column indicates whether a ___ has been created for the Action.	
7. Use the ___ to see which Approver has put the PCR on reserve.	
8. Click the ___ to access the Action screen to view the data entered for the PCR.	

SUMMARY

In this lesson, you learned to:

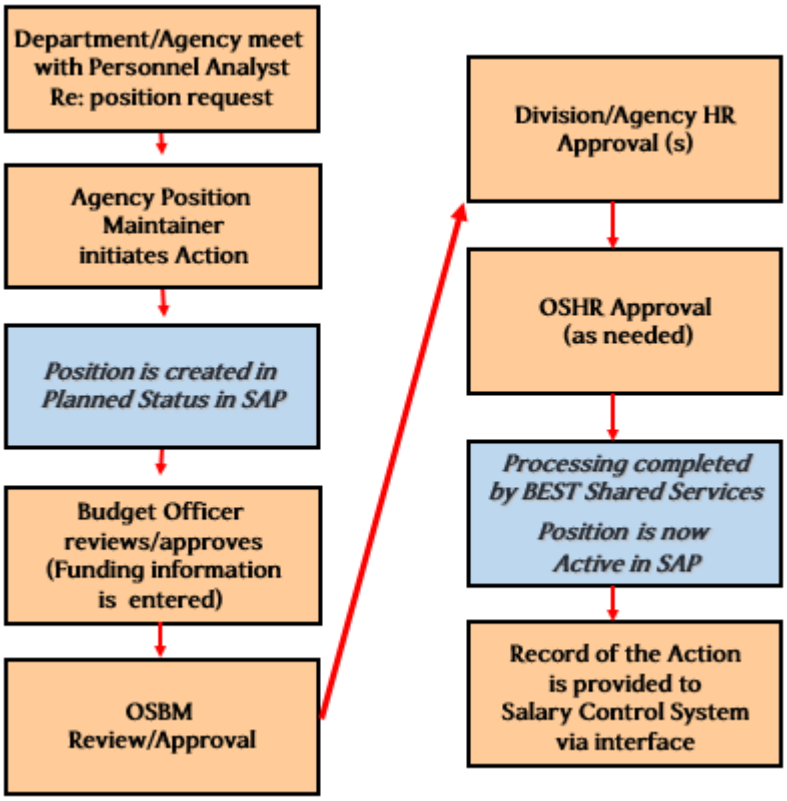
- Access Workflow Inbox in transaction code SBWP
- Use the different Folders and options in Inbox and Outbox
- Identify the Workflow Item Statuses
- Open a Workflow Item
- Review the Workflow Log
- Use the Workflow Tracker
- Use the Workflow Header

LESSON 3: APPROVING OM WORKFLOW PCRS

Objectives

- Describe the OM Position Workflow process
- Discuss the routing and processing of OM Workflow Items
- Approve a new Position
- Remove a Position PCR from the process
- Use the Workflow Log and Tracker
- Describe how to cancel an OM PCR

Organizational Management (OM) Workflow Process Flow



NOTE: If at any point in the process the Action is rejected, Salary Control is not affected, and the Position status will be changed to **Rejected** in the Integrated HR-Payroll System.

All OM Position Actions are initiated in Workflow (WF). Approvers at any level can approve to the next level or return to the Initiator. The Initiator can make applicable changes and resubmit to begin the approval process over again, if possible.

Roles involved in Position Actions:

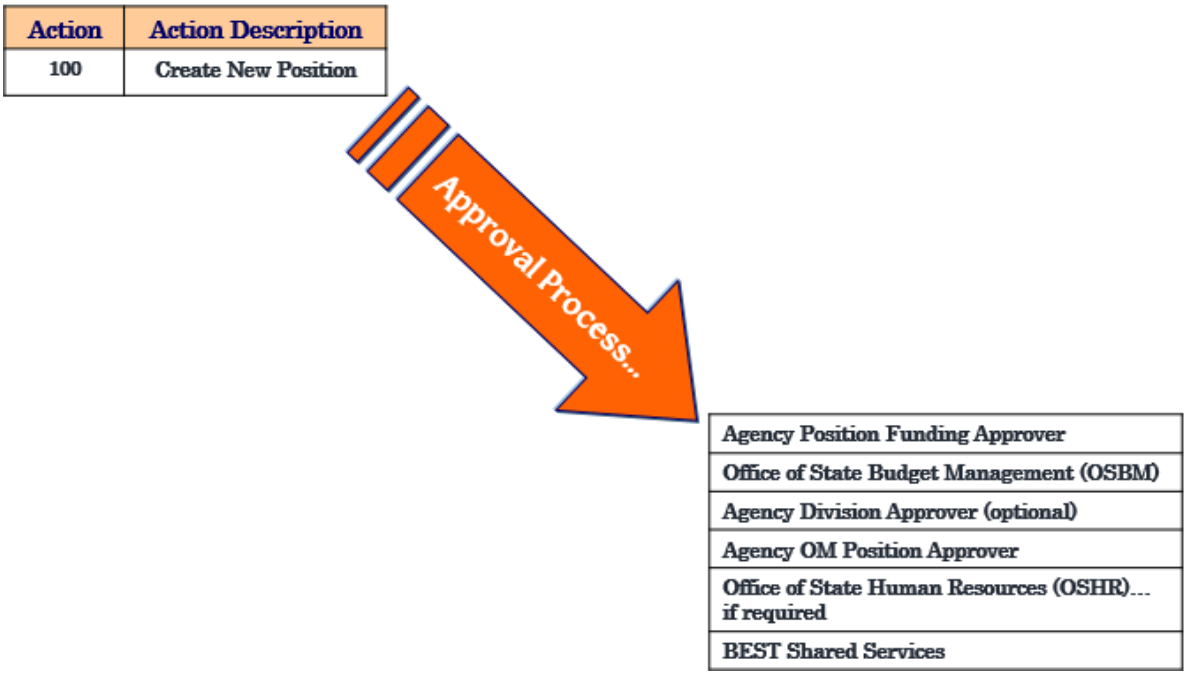
- Agency HR Personnel Analyst researches the Action with the appropriate manager.
- Agency HR personnel uses the *Position Actions* (ZOMA069) transaction to enter the required Position data and then initiates Workflow for approvals.
- Agency Salary Control Officer (Agency Position Funding Approver) enters cost distribution and salary and approves the Workflow or rejects it.
- The OSBM (Office of State Budget and Management) Position Funding Approver approves or rejects the Position Action if applicable. OSBM approval is not required for temporary positions.
- Division Position approver approves or rejects the Position Action.

- Agency Position approver approves or rejects the Position Action.
- The OSHR Position approver approves or rejects Position Action.
- After final approval, BEST reviews and moves the status to active (or rejects).

It should be noted that some Position changes can be made without Workflow such as:

- Position Working Title
- Position Type
- Position Address
- Cost Distribution changes and Budgeted Salary changes (Funding Approver role only)
- Time Settings
- Vacancy changes

OM Routing Table



The New Position OM Action requires OSBM Approval.

BEST Shared Services completes the actions as a final step and ensures proper recording onto positions and their histories.

Action	Action Description
102	Re-Establish Position
103	Reallocate Position Up
104	Reallocate Position Down
105	Reallocate Position Horizontal
106	Position Adjustment from Authorization
107	Reallocate Position Differential
108	Remove Position Differential
113	Position Transfer
115	Position Hours Change
116	Position Employee Group/Subgroup Change

Agency Position Funding Approver
Agency Division Approver (optional)
Agency OM Position Approver
OSHR ... if required
BEST Shared Services

These Actions shown above **do not** require OSBM approval.

BEST Shared Services completes these Position Actions in a similar manner as new Position Actions.

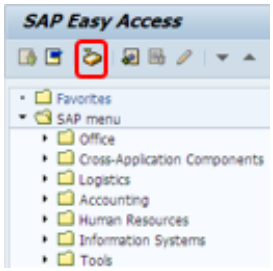
🗁 **NOTE**: Abolish Position and Re-Establish Position currently require a ticket entered with BEST Shared Services for processing.

Additional Resources
Refer to the OSC Training website in HELP documents for more information about Workflow buttons and functions. Search for the following job aids: • *OM Workflow Routing Process Job Aid* • *OM Workflow Steps in Approval Process Job Aid*

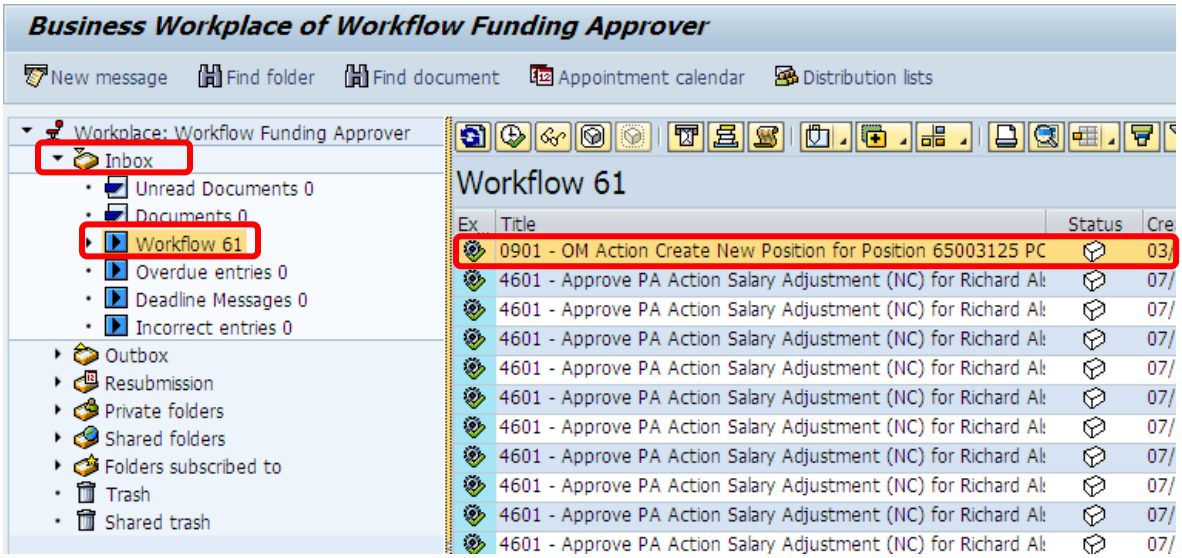
Accessing the Workflow Inbox (SBWP)

Click on the **SAP Business Workplace** button  .

As the OM Approver, you will log into your Inbox (SAP Business Workplace, or transaction code SBWP) to view all the Workflow PCRs that have been sent to you to process.



Opening an OM Workflow PCR

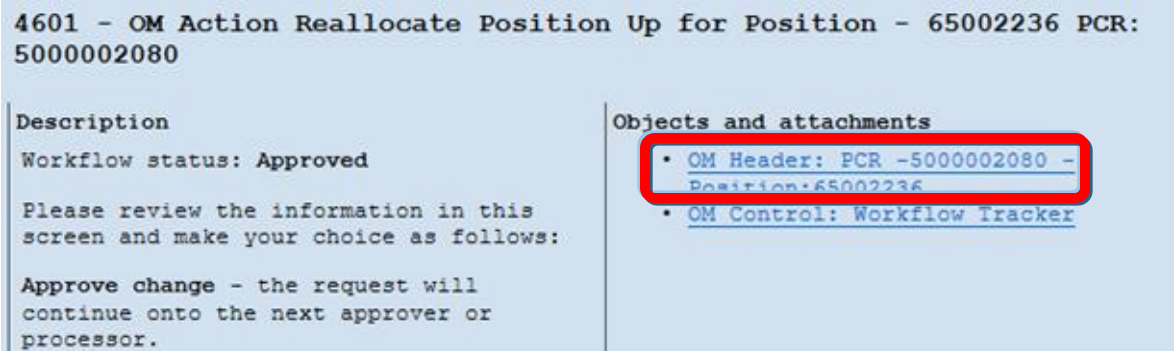


Follow these steps to enter the SAP Workflow Inbox:

1. SINGLE-click the node next to the Inbox folder to expand it.
2. DOUBLE-click Workflow. All the Workflow PCRs sent to the Approver (which is our role for class today) for processing display in the right column. In the illustration, above, the Approver has multiple PCRs in the Inbox.
3. The Approver can either select and double-click on the Workflow PCR to execute it or click the Execute button on the toolbar.

Additional Resources
Refer to the OSC Training website in HELP documents for more information about Workflow buttons and functions. Search for the following job aids: • *Business Workplace Button Functions* • *Business Workplace Overview Tree Functions*

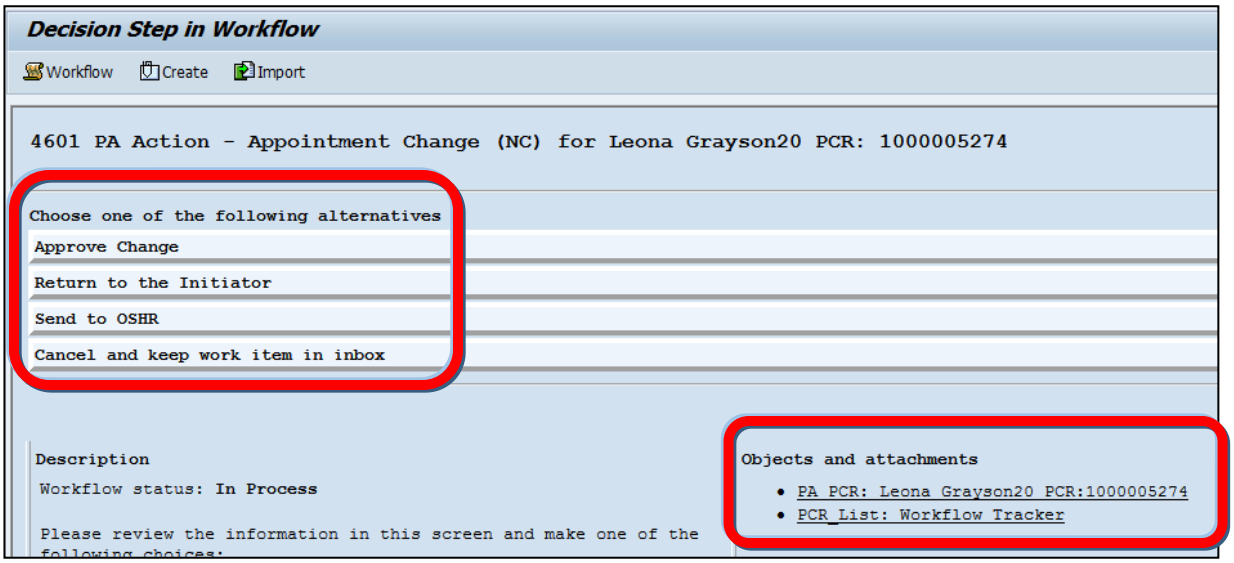
Reviewing the PCR on the Header



To review the PCR, the Approver must click the **OM_Header PCR - <pcr number> Position <position number> link** located in the lower left area of the Workflow Inbox. The PCR opens and allows the Approver to view the data that the Initiator entered on the various tabs.

Alternatively, the Approver also can use the Workflow Tracker (located in the same area) to see the actions already taken, by whom it was taken, and where the PCR will be sent next.

Decision Step

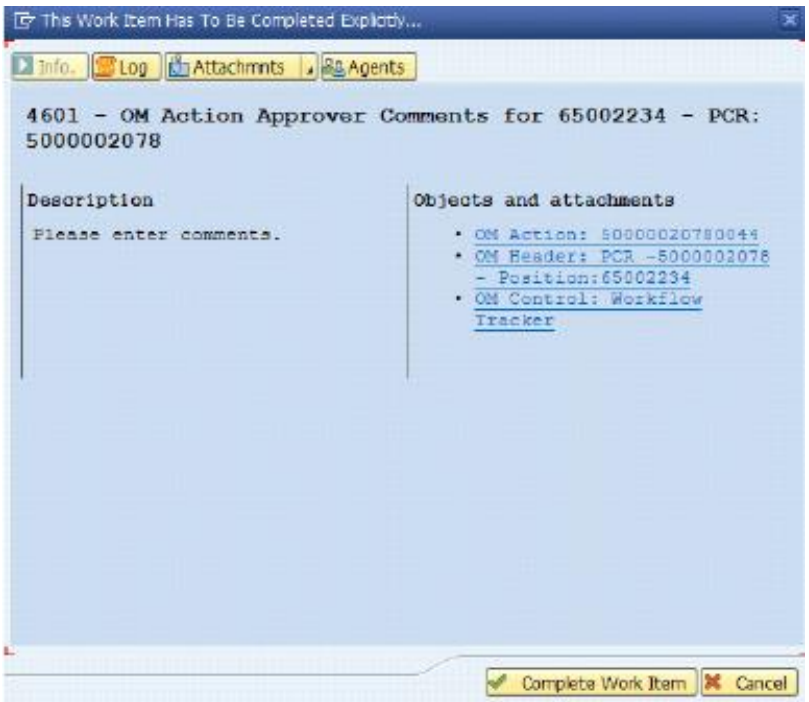


After the PCR is executed, the Decision Step in Workflow screen is displayed. The Approver can also view the Header and Tracker from this screen. The Approver can either Approve, Return to Initiator (reject), or Cancel and keep the work item in the Inbox.

🗁 **NOTE**: "Cancel and keep the work item in inbox" places the PCR only in the Inbox of the Approver who canceled it. This decision removes the PCR from the Inbox of any other Approvers who were at the same Approval level. Using the Cancel function allows an Approver to research information and either approve or return the PCR at a later date. This cancel function does not cancel the PCR.

Rejecting a PCR

When an approver rejects/returns an OM PCR to the initiator, a final dialog box will display. Choosing to complete the action at this point, does not mean that the approver is setting the entire PCR to a completed status, only that the approver is completing the "rejection" of the PCR.



4601 - OM Action Approver Comments for 65002234 - PCR: 5000002078

Description

Please enter comments.

Objects and attachments

- OM Action: 50000020780044
- OM Header: PCR -5000002078 - Position:65002234
- OM Control: Workflow Tracker

* *

EXERCISE 3.1: Approve a Position PCR

SCENARIO

A Position Reallocation PCR has been sent to your Inbox. Review the PCR and accompanying note. Approve the PCR. Note that you are the OM Division/Agency Approver.

After you have approved the PCR, go into your Outbox and use the Workflow tracker to see the next Approver to which the PCR has been sent.

Instructions

1. From the Easy Access screen, click **SAP Business Workplace** .
2. Click the **node** beside Inbox to expand it.
3. Single-click **Workflow**. The PCRs that have been sent for approval are listed in the right column.
4. Click to update the screen. This ensures that the most current PCRs that have been sent to the Inbox display.
5. Click <u>one time</u> (do not double-click) the **applicable PCR** below as assigned to you by your instructor:

PCR #: *REALLOCATE UP – BARBARA PHILLIPS' POSITION*							
1	5000002061	6	5000002066	11	5000002071	16	5000002076
2	5000002062	7	5000002067	12	5000002072	17	5000002077
3	5000002063	8	5000002068	13	5000002073	18	5000002078
4	5000002064	9	5000002069	14	**5000002074**	19	5000002079
5	5000002065	10	5000002070	15	5000002075	20	5000002080

6. At the top of the screen, observe the **Reserve** button is active. The **Replace** button is grayed out. You will use these later in the course.
7. In the bottom section of the screen, scroll down and click the link for the **OM_Header PCR - <pcr number> Position <position number>**. The PCR Position Action Request screen is displayed.

   NOTE: Observe there are three tabs (General, Time, and Cost).

8. Click each tab and review the information. Observe that you can view each tab but cannot make any changes to the data.
9. Click the **Services for Object** button to review any attachments (or notes) that were entered by the Initiator.

   NOTE: The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.

10. Select **Attachment List**. The Services: Attachment list pop-up displays.

11. Highlight the line item for the note, and double-click the **Display** button. The Display note pop-up is displayed with the note title and note information.
12. Click ☒ to close the Display note pop-up.
13. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
14. Click the **Back button** to return to the Business Workplace for Approver screen.
15. With the applicable PCR still selected, click the **Execute** button (or double-click the PCR line item). Observe that you also can see the Header information from this screen.
16. Click the **Approve change** option. The Workflow item is sent to the next approval (Funding) level.

    🗀 **NOTE**: Funding is the first approval for OM. Then it goes to the Division/Agency Approver.

Instructions - View Tracker

17. Click the node beside **Outbox** ▸ Outbox to expand it.
18. SINGLE-click **Workflow items executed by me**. The PCRs on which you have taken action (approved or returned) are listed in the right column.

    🗀 **NOTE**: Only the Initiator can cancel the PCR.

19. Select the PCR you want to review.
20. In the bottom section of the screen scroll down and click the link for the **PCR_List: Workflow Tracker**. The Workflow action screen is displayed.
21. Review the screen for details for the Approvers, including the Approver roles as well as date and time processed.
22. Exit the Workflow Tracker back to the Easy Access screen by either clicking the **Back** button or the **X** in the right-hand corner.

This exercise is complete.

* *

* *

EXERCISE 3.2: Reserve a Position Change PCR

SCENARIO

You have received a PCR to change the county of a position. When you review the PCR and the accompanying note, you believe the wrong county has been selected. Use the Reserve function to remove it from Workflow until you complete your research. In this exercise, you are the OM Division/Agency Approver.

Instructions

1. From the Easy Access screen, click **SAP Business Workplace** .
2. Click the **node** beside Inbox to expand it.
3. Single-click **Workflow**. The PCRs that have been sent for approval are listed in the right column.
4. Click to update the screen. This ensures that the most current PCRs that have been sent to the Inbox display.
5. Click <u>one time</u> (do not double-click) the **applicable PCR** below as assigned to you by your instructor:

PCR #: COUNTY CHANGE ON VERA GLOVER'S POSITION							
1	5000002040	6	5000002045	11	5000002050	16	5000002055
2	5000002041	7	5000002046	12	5000002051	17	5000002056
3	5000002042	8	5000002047	13	5000002052	18	5000002057
4	5000002043	9	5000002048	14	5000002053	19	5000002058
5	5000002044	10	5000002049	15	5000002054	20	5000002059

At the top of the screen, observe the **Reserve** button is active. The **Replace** button is grayed out. You will use these later in the course.

6. In the bottom section of the screen, scroll down and click the link for the **OM_Header PCR - <pcr number> Position <position number>**. The PCR Position Action Request screen is displayed.

7. Review the information. Observe that you can view the information but cannot make any changes to the data.
8. Click the **Services for Object** button to review any notes that were entered by the Initiator.

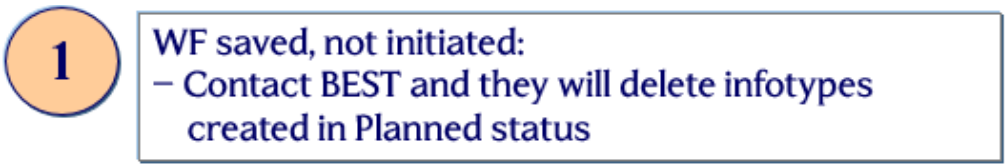
   NOTE: The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.

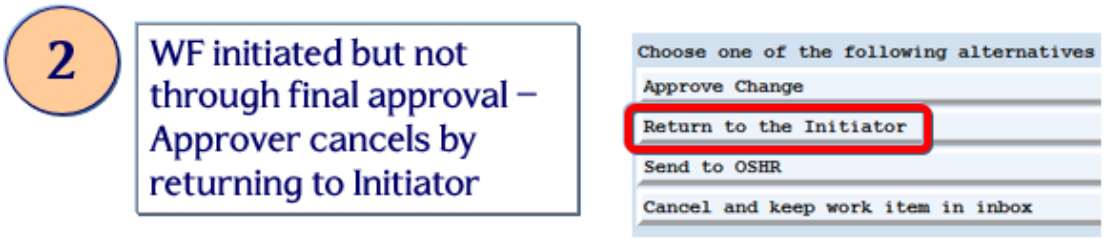
9. Select **Attachment List**. The Services: Attachment list pop-up is displayed.
10. Highlight the line item for the note, and click the **Display** button . The Display note pop-up displays with the note title and note information.
11. Click to close the Display note pop-up.
12. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
13. Click the **Back** button to return to the Business Workplace for Approver screen.
14. With the applicable PCR selected, click the **Reserve** button . You have now taken ownership of the workflow item and removed it from the general Inbox of the other Approvers. Observe that the icon for Reserve is now grayed out and the new icon (Replace) is active. You will use Replace when you are ready to put the PCR back into the group of Agents again. Now, you decide that you still have more research to do so you are not ready to put the PCR back into Workflow.
15. Click the **Display Workflow Log** button to view who the Approvers are and the time stamp of their approval.
16. From the "View WF Chronicle" Tab, click the **Agents** button Ready next to Ready to view the options.
17. Click Agents. This allows you to see the Approvers who could have approved the PCR if you had not reserved it. In your work environment, the list will have the Approvers names and ID numbers.
18. Close the Agents pop-up.
19. Exit the Workflow Log back to the Easy Access screen.

This exercise is complete.

* *

Canceling an OM PCR (Initiator/Approver)





The method you use to delete a PCR depends upon where it is in the process.

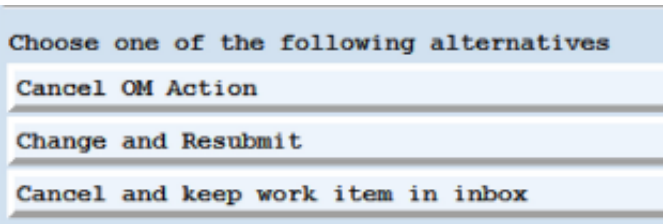
1. **If the Workflow is saved but not initiated:**

   If OM Workflow was saved but not initiated, contact BEST and they will have the PCR set to Cancelled and delete the infotypes that have been created in Planned status.

2. **You initiated Workflow but the PCR has not reached final approval:**

   Contact the Approver and request that the PCR be returned (rejected) to you. You can then Execute the PCR. When the Decision Step in Workflow screen displays, click the Cancel PCR option (illustrated below). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it has been cancelled.

   Once BEST Shared Services approves the change, the PCR status will be set to Complete. (Basically BEST is approving the cancellation of the PCR.).



KNOWLEDGE CHECK

QUESTION	ANSWER
1. ___ approval is not required for temporary positions.	
2. The *Send to OSHR* option is not an automatic step and is available only at the ___ approval level (depending on Agency Delegation of Authority).	
3. When the Workflow item is saved, the Integrated HR-Payroll System assigns a ___.	
4. The ___ Approver enters Cost information and budgeted salary.	
5. The *Cancel and keep the work item in inbox* option does not ___ the PCR.	

SUMMARY

In this lesson, you learned to:

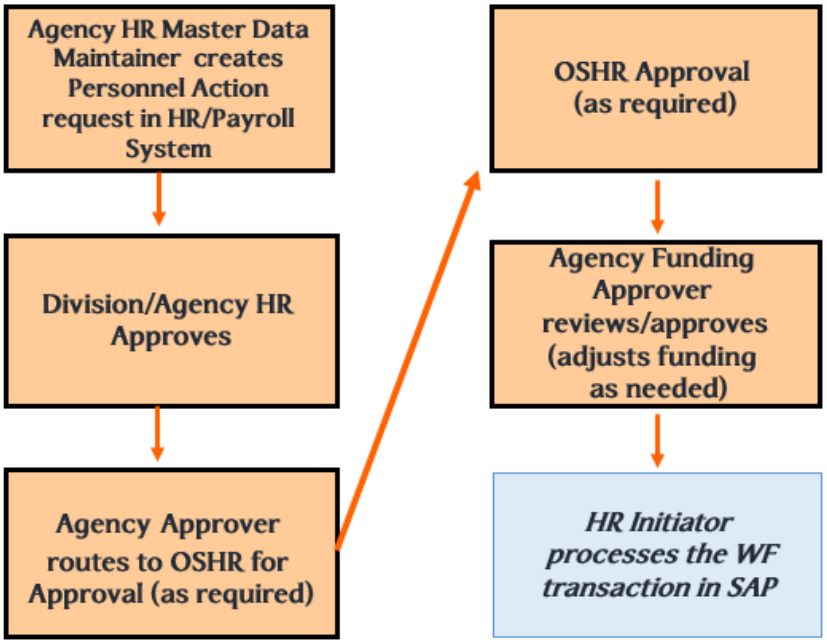
- Access Workflow Inbox in transaction code SBWP
- Use the different Folders and options in Inbox and Outbox
- Identify the Workflow Item Statuses
- Identify the priority levels that can be set for a PCR
- Open a Workflow Item
- Review the Workflow Log
- Use the Workflow Tracker
- Use the Workflow Header
- Describe how to cancel an OM PCR

Lesson 4: Approving PA Workflow PCRs

Objectives

- Describe the PA Personnel Workflow process
- Discuss the routing and processing of PA Workflow PCRs
- Approve PA Actions

Personnel Administration (PA) Workflow Process Flow

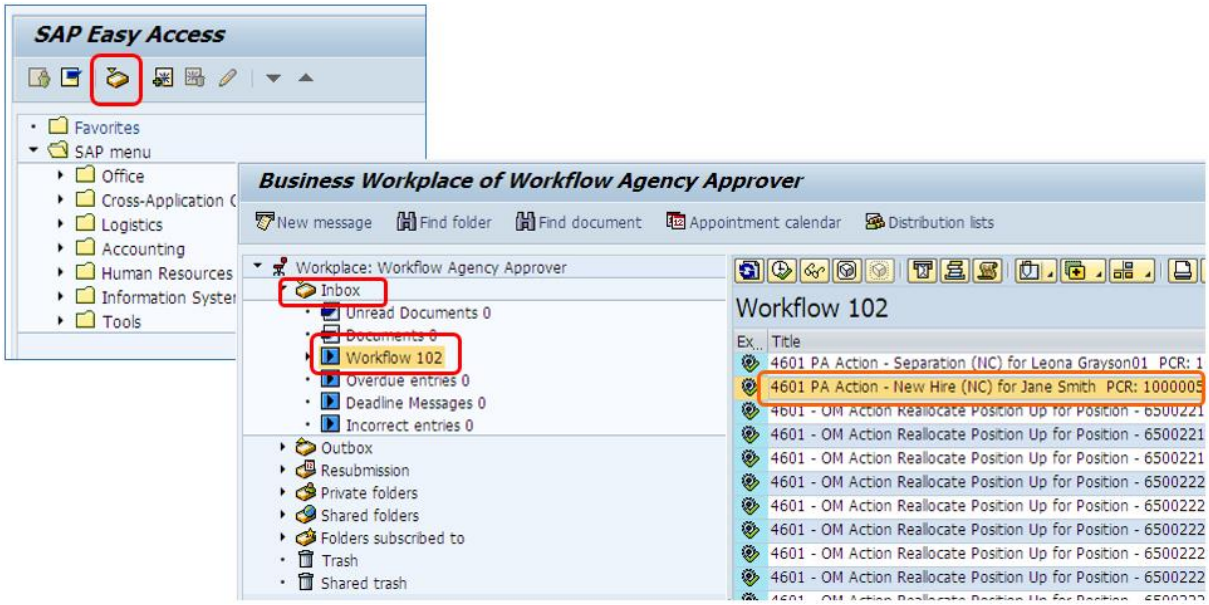


The PA action is not complete until the PCR has been approved and processed by the Initiator. The Workflow PCR is simply a form to collect some of the basic information for approval purposes before the Personnel Action is processed (and the employee's personnel file is updated). When the approval process is complete, the Initiator receives the PCR back in his or her Inbox. The Initiator executes the PCR from the Inbox and the Integrated HR-Payroll System automatically takes the initiator to the appropriate screen (Hiring for New Hires and Non-Beacon to Beacon; Personnel Actions for all others). The Initiator enters data or saves all applicable infotypes (the system has bundled all the appropriate infotypes that require attention for the Action). After all infotypes have been completed, the Initiator receives the "Complete Workflow Item" button. It is important that only when the PA Action has been completely processed should the initiator mark the PCR workflow item as complete.

If the PCR is marked complete prior to the Action being completely processed in, the Initiator must use transaction code PA40 to re-process the Action and enter data and/or save as applicable every infotype appropriate for that Action.

Additional Resources
Refer to the OSC Training website in HELP documents for more information about Workflow buttons and functions. Search for the following support document titles: • *Business Workplace Button Functions* • *Business Workplace Overview Tree Functions*

Approving PA Actions via the Inbox (SBWP)



Approving PA Actions is, in many ways, like the process you used to approve Position OM Actions in earlier exercises. You will access your Inbox to locate PA PCRs that have been sent for you to approve, cancel, or return.

You can view notes and attachments as well as using the Workflow Tracker and Log.

* *

EXERCISE 4.1: Approve a Promotion PCR

SCENARIO

A PCR to promote Allison Sellers has been sent to your Inbox. Review the PCR and accompanying note. It needs your approval. In this exercise, you are the PA Division/Agency Approver.

After you have approved the PCR, go into your Outbox and use the Workflow tracker to see the next Approver to which the PCR has been sent.

Instructions

1. Use information learned in previous exercises to approve the PCR.

Process Hints:

- Go to your Workflow Inbox.
- Select (do not double-click) the PCR. See table below and locate the PCR you need to use in this exercise.

PCR #: *Promotion: Allison Sellers*							
1	1000005294	6	1000005299	11	1000005304	16	1000005309
2	1000005295	7	1000005300	12	1000005305	17	1000005310
3	1000005296	8	1000005301	13	1000005306	18	1000005311
4	1000005297	9	1000005302	14	1000005307	19	1000005312
5	1000005298	10	1000005303	15	1000005308	20	1000005313

- Review the comments.
- Execute the PCR.
- Approve the PCR.
- Refresh the Inbox.

2. After you have approved the PCR view the item in the Workflow Tracker.

Process Hints:

- Go to your Workflow Outbox.
- Select the PCR you wish to review.
- Open the Workflow Tracker and review the PCR.
- Exit the Workflow Tracker

This exercise is complete.

* *

EXERCISE 4.2: Reject a Salary Adjustment PCR

SCENARIO

A PCR to give a salary adjustment to Nancy Gonzalez has been sent to your Inbox. Review the PCR and accompanying note, and then reject it. You will be required to write a note explaining to the Initiator why you are rejecting the PCR. In this exercise, you are the PA Division/Agency Approver.

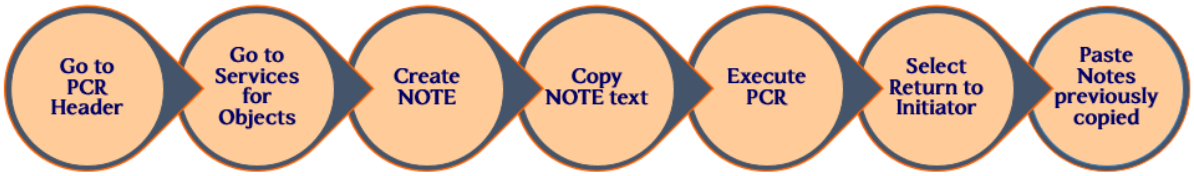
Rejecting PCRs

The Integrated HR-Payroll System allows up to 20 initiations, approvals and/or rejections of a PCR. If the PCR is rejected numerous times, this places it at risk for being lost.

Use the Workflow Log or Tracker to see how many approvals/rejections have taken place on a particular PCR.

INFORMATION

***BEST BUSINESS PRACTICE**: A good practice to perform is to enter the rejection comments not only in the mandatory pop-up box for the comments, but also in the PA PCR Services for Objects as well. This creates a sort of "one-stop" location for all comments about the PCR*



Instructions

1. Go to your Workflow Inbox.
2. Select (do not double-click) the PCR. See table below and locate the PCR you need to use in this exercise.

PCR #: *Salary Adjustment: Nancy Gonzalez*							
1	1000005417	6	1000005422	11	1000005428	16	1000005433
2	1000005418	7	1000005423	12	1000005429	17	1000005434
3	1000005419	8	1000005424	13	1000005430	18	1000005435
4	1000005420	9	1000005426	14	1000005431	19	1000005436
5	1000005421	10	1000005427	15	1000005432	20	1000005436

3. Open the PCR to review by SINGLE-clicking the **PCR Header** in the lower right-hand corner of the screen.
4. Access the **Attachment list** on Services for Objects and double-click on the note to read the comments from the Initiator.
5. Close the comments pop-up box.
6. While still in the Attachment list, click on the **New > Create note** button.
7. Enter the title of your note as **Rejection Comments**.
8. Enter your rejection comments in the text box below the title.
9. Before you click the **green check** button, copy those notes.
10. Now, click the **green check** button. You are again on the Services for Objects attachment list.
11. Click the **green check** button.
12. Click the **green back arrow** to return to the PCR list in Workflow screen.
13. Make sure your PCR is still selected (highlighted).

14. Open the PCR by either double-clicking on the selected PCR or clicking the **Execute (F8)** button.
15. Click the **Return to the Initiator** option. An Approver Comments dialog box opens on the screen.
16. Paste the text you copied in step 9 in the text box in the Approver Comments box.
17. Click **Save**. A pop-up box displays indicating that the approver comments have been saved.

    REMEMBER...after entering the rejection note, do not click the Green Check mark first.
18. Click the **green check** to close the pop-up box.
19. Click the **Back** button to return to the Inbox.
20. Click the **Update** button to refresh the Inbox.
21. On the SAP Business Workplace, click the **Outbox**.
22. SINGLE-click **Workflow items executed by me**. The PCRs on which you have taken action (approved or returned) are listed in the right column.
23. In the Inbox, SINGLE-click the **PCR** you just rejected.
24. At the bottom right-hand area of the screen, SINGLE-click the **PCR List: Workflow Tracker**. The Workflow actions screen is displayed.
25. Locate the **X** mark under the Comments column.
26. Select that line by **clicking on the box** to the left at the beginning of the line.
27. Click the **Notes** button at the bottom left-hand corner. A comment box is displayed with the Approver's rejection comments.
28. Click the **Back** button to return to the Workflow actions screen.
29. Click the **Back** button again to return to the SAP Business Workplace screen.

    NOTE: Adding all comments about the PCR to the Services for Objects button, including Send to OSHR notes, will keep all comments about that PCR together in one location and will be copied to the Actions infotype during the PA Actions infotype creation process.

This exercise is complete.

* *

* *

EXERCISE 4.3: Cancel a Suspension PCR and Keep it in the Inbox

SCENARIO

A PCR to place Ronald Barr on suspension has been sent to your Inbox. After you view the PCR you decide that you need to research this request. You think the effective date should be earlier than the date on the PCR. After you review the PCR and accompanying note, use the Cancel and Keep work item in Inbox option function to remove it from Workflow until you complete your research. In this exercise, you are the PA Division/Agency Approver.

Instructions

1. Select (do not double-click) the applicable PCR and use the Header to review the note. See table below.

PCR #: *Cancel Suspension: Ronald Barr*							
1	1000005274	6	1000005279	11	1000005284	16	1000005289
2	1000005275	7	1000005280	12	1000005285	17	1000005290
3	1000005276	8	1000005281	13	1000005286	18	1000005291
4	1000005277	9	1000005282	14	1000005287	19	1000005292
5	1000005278	10	1000005283	15	1000005288	20	1000005293

2. Click the **Back** button to return to the Approver screen.
3. Observe that the **Reserve** icon on the toolbar is active. Also, notice that the **Replace** icon is grayed out.
4. With the applicable PCR selected, execute the PCR.
5. Select the **Cancel** button and **Keep Work Item in Inbox** option. You have now taken ownership of the workflow item and removed it from the general Inbox of the other Agents.

   Observe that the icon for Reserve is now grayed out, and Replace is active. When you are ready to put the PCR back into the group of Agents again, you can use Replace. However, if you are ready to approve it, you can click Execute without placing it back into Workflow.

The use of the Cancel and Keep Work Item in Inbox function is the equivalent of using the Reserve button. However, Replace puts it back into the Workflow again without any action taken whereas Execute and clicking an option means that you took action on the request.

This exercise is complete.

* *

EXERCISE 4.4: Replace and Approve a PCR

SCENARIO

You have finished researching both the Position County PCR (from Exercise 3.2). You determined that the PCR as originally submitted is correct. Process the PCR.

🗁 **NOTE**: If you wanted to place the PCR back into the Inbox of all Approvers at your level, instead of executing it, you would use the "Replace" icon to place it back in Workflow.

Instructions

1. Using information, you learned in previous Exercises:

- Approve the Position County Change PCR

PCR #: *County Change on Vera Glover's Position*							
1	5000002040	6	5000002045	11	5000002050	16	5000002055
2	5000002041	7	5000002046	12	5000002051	17	5000002056
3	5000002042	8	5000002047	13	5000002052	18	5000002057
4	5000002043	9	5000002048	14	5000002053	19	5000002058
5	5000002044	10	5000002049	15	5000002054	20	5000002059

- Return to the SAP Easy Access screen.

This exercise is complete.

* *

* *

EXERCISE 4.5: Replace a PCR, Approve It and Send to OSHR

SCENARIO

You have finished researching the Suspension for Ronald Barr (from Exercise 4.3). You determined that the PCR as originally submitted is correct. Process the PCR. You will send the Suspension PCR with comments on to OSHR.

Instructions

Process Hint: *Don't forget your note to OSHR. Do this by adding it on the Services for Objects option when you view the PCR.*

1. Using information you learned in previous Exercises:
   - Send the Ronald Barr Suspension PCR to OSHR.

PCR #: *Cancel Suspension: Ronald Barr*							
1	1000005274	6	1000005279	11	1000005284	16	1000005289
2	1000005275	7	1000005280	12	1000005285	17	1000005290
3	1000005276	8	1000005281	13	1000005286	18	1000005291
4	1000005277	9	1000005282	14	1000005287	19	1000005292
5	1000005278	10	1000005283	15	1000005288	20	1000005293

   - Return to the SAP Easy Access screen.

This exercise is complete.

* *

Additional Resources
Refer to the OSC Training website in HELP documents for more information about Workflow buttons and functions. Search for the following support document titles: • *PA Workflow Inbox* • *PA Workflow Routing Process* • *PA Workflow Steps in Approval Process*

KNOWLEDGE CHECK

Question	Answer
1. TRUE or FALSE: The PA action is not complete until the PCR has been approved and processed by the Initiator.	
2. When a PA PCR has been completely approved, the ___ receives the PCR back in his or her Inbox.	
3. You can view notes and attachments as well by using the ___.	
4. Executing and clicking an option means that you took ___ on the request.	

SUMMARY

In this lesson, you learned to:

- Describe the PA Personnel Workflow process
- Discuss the routing and processing of PA Workflow PCRs
- Approve PA Actions

Lesson 5: Workflow Reporting & Troubleshooting

Objectives

- Explain common Workflow issues and errors
- Execute Workflow reports to display the Workflow status
- Execute reports to determine Workflow security levels
- Create and save a variant for a report
- Retrieve a variant for a report

Workflow Report Overview

The Workflow Report allows Approver and Managers to see at a glance the:

- Type of Actions and reasons created in the Agency
- Actions that are awaiting approval and at which approval level
- Length of time an approval has been waiting
- Transaction codes:
  - ZPA0189 (PA reports)
  - ZOM0178 (OM reports)
  - ZPAWFMON (PA Workflow Process Monitoring)
  - ZOMWFMON (OM Workflow Process Monitoring)
- Reports can be run based on security by:
  - Agency
  - Groups
  - Individual PCR

Additional Resources
Refer to the OSC Training website in HELP documents for more information about Workflow Reports. Search for the following support document titles: • *Workflow Report Job Aid*

Searching for PCRs

When using Workflow reports, results can be narrowed by utilizing some or all the following criteria:

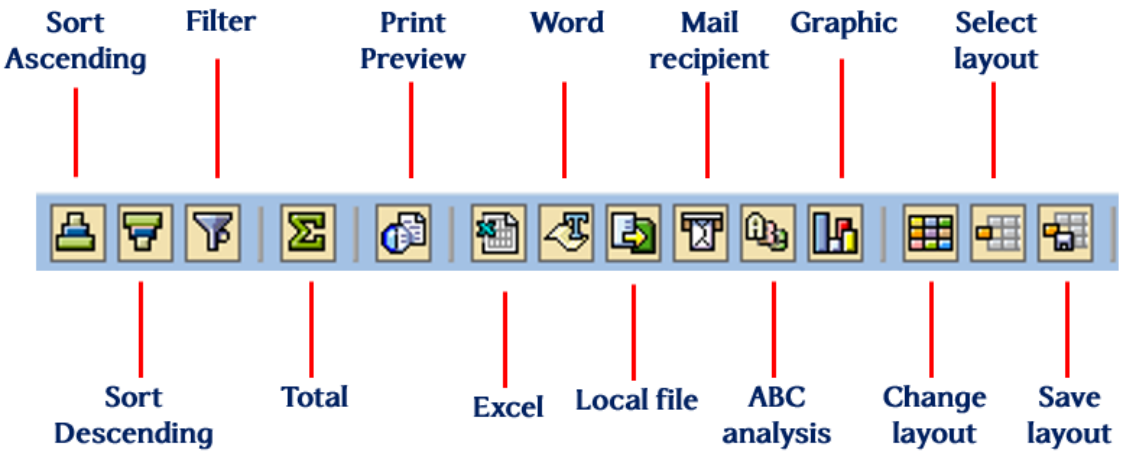
PA

- Personnel number
- Action type
- Personnel area
- PCR ID
- PCR Workflow Approval Level

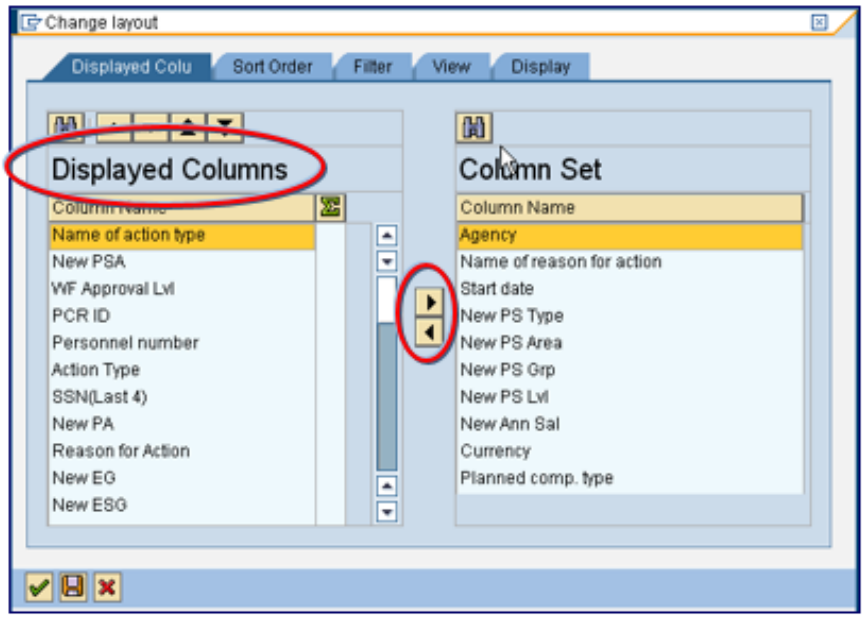
OM

- Position ID
- Action
- Personnel area
- PCR ID
- PCR Workflow Approval level

Report Options



Modify Layout



- Use the Change Layout option to remove fields that you do not want to display from left to right.
- Drag and drop columns on the report to change the order.

Save Layout

- Save layout field
  - Short name (begin with Z for user-specific)
- Name
  - Longer description for the layout
- User-specific
  - Only you have access
- Default setting
  - Indicates you want the layout to display each time the report is run

Use a Layout

- Complete search criteria fields for the report.
- Click the Select layout option.

- - OR - -

- From the menu: **Settings** > **Layout** > **Choose**.
- Select the applicable layout option.
- Execute the report.

PCR Troubleshooting

There are several reasons why a PCR may appear to be "lost." It is best practice to record the PCR number, date and position number (if applicable) to track a PCR later in case it is "lost."

1. If the Initiator merely saved the PCR and did not click the Initiate Workflow button, the PCR is not visible in their outbox. Therefore, an Approver who is waiting to see the PCR in the Approver Inbox will not be able to see it in their inbox. The Initiator may choose edit in either ZOMA069 (OM) or ZPAA076 (PA).
2. The Initiator or Approver has incorrect security roles to process a PCR.
3. If a user is an Initiator as well as an Approver, it can sometimes be confusing. That is because the same PCR will leave the Inbox of the Initiator role and be sent to the Inbox of the Approver role (which to the employee is the same Inbox).

4. In PA, the Initiator must click a "Completed Workflow Item" button when the personnel action has been processed. In some cases, the Initiator may have inadvertently clicked the button prematurely after backing out of an Action without processing all infotypes.
5. If a PCR/workflow item is "touched" more than 20 times or too quickly by an approver, it can disappear from the workflow process automatically. Contact BEST Shared Services to confirm. A new PCR may need to be created.

   🗁 **NOTE:** If an approver who is out of the office has PCRs they have ben reserved, the Agency can submit a ticket to BEST Shared Services to have a Workflow substitution granted. The user who is substituting must have the same security role(s) as the one for whom the user is being substituted.

* *

EXERCISE 5.1: Execute the Workflow Report (PA)

SCENARIO

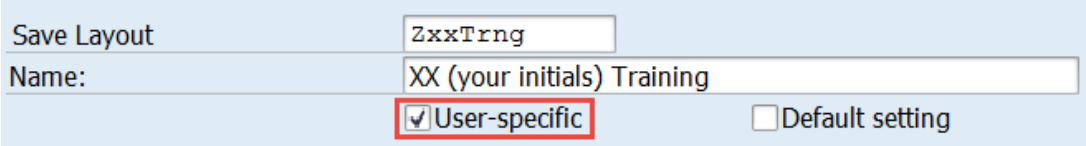
You need to see if there are any Suspension and Reallocation Actions awaiting approval for the Natural & Cultural Resources Personnel Area. In addition, you want to change and save the layout to your specifications.

🗁 **NOTE**: For PA Actions use transaction code ZPA0189; for OM use ZOM0178

Instructions

1. From the Easy Access screen, enter **ZPA0189** into the Command Field.
2. **Enter**.
3. In the Action Type field, use the matchcode to select the codes for **Suspension to Reallocation**.
4. In the Personnel Area field, use the matchcode to select **Natural & Cultural Resources**.
5. **Enter** and **Execute**.

6. Click the **Change Layout** button and move items on the left Columns Displayed panel to the Column Set on the right until only those in the list below are visible in the Columns Displayed:
   - Name of action type
   - Name of reason for action
   - WF Approval Lvl
   - PCR ID
   - Personnel number
   - Effective Date
   - Name of employee or applicant
   - Created Date
7. Click the **green check** to close the Change Layout pop-up.
8. Assume you have decided to move the order of the columns. Drag and drop the columns so that they display left to right as shown below:
   - PCR ID
   - Name of action type
   - Name of reason for action
   - Effective Date
   - Created Date
   - WF Approval Lvl
   - Personnel number
   - Name of employee or applicant
9. Click the **Save Layout**  button.



10. In the Save Layout field, enter: **ZxxTrng** (where xx = your initials).

    NOTE: When you use the User-specific button, you must begin the field with the letter Z. When saving as a public layout, use the forward slash (/) at the beginning of the Save Layout name.

11. In the Name field enter **xx** (your initials) Training.

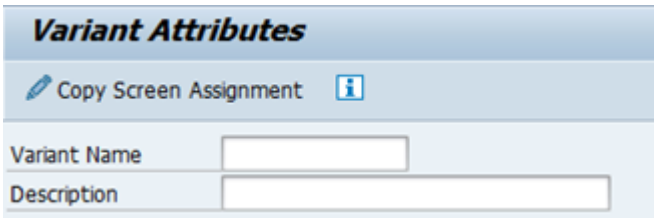
12. Click the **User-specific** checkbox. This indicates that the layout is restricted to your user ID. If you do not select User-specific, the layout can be used and modified by anyone with the security to run the report.

13. Click the **green check**. A message displays indicating that the layout is saved.

14. Click the **Back** button to return to the Report criteria screen.

Now save as a variant for the rest of your team to use.

15. On the Menu at the top of the screen, click **Goto > Variants > Save as variant**. The Variant Attributes screen is displayed.



16. Create a **name** in the Variant name field.

17. Create a **description** of the report in the Description field that identifies the purpose of the report.

18. **Save** your variant.

    The next time you need to use a Variant:

    - Click the **Get Variant** button or select menu path Goto > Variants > Get.
    - In the pop-up box, double-click desired **Variant** to select.

- The system will populate your report with the fields you set up when you created the variant.
- **Modify** and **enter data** as needed prior to executing the report.

19. Click the **Back** button to return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 5.2: Use a Saved Layout to Run the Workflow Report

SCENARIO

You need to see if there are any Promotion PA Actions for Personnel Area 4601 (Natural & Cultural Resources) awaiting approval. You want to use the layout that you previously saved.

Instructions

1. From the Easy Access screen, enter **ZPA0189** into the Command Field.
2. In the Action Type fields, use the matchcode to select **Promotion**.
3. In the Personnel Area field, use the matchcode to select **Natural & Cultural Resources**.
4. Click in the **ALV** variant field and select the layout you previously saved.
5. **Enter** and **Execute**. The report should display with the same layout as in the previous exercise.

   🗁 **NOTE**: If you forget to select the variant layout to execute the report, you can still apply the layout after you are in the report. To do so, click the Select layout button and choose the applicable saved layout.

This exercise is complete.

Additional Resources
Refer to the OSC Training website in HELP documents for more information about Workflow buttons, functions, and reports. Search for the following support document titles: • *Business Workplace Button Functions* • *How to Locate Monitor an OM PCR* • *OM Business Workplace Dynamic Columns & Layouts* • *Business Workplace Overview Tree Functions* • *OM Workflow Inbox* • *OM Workflow Routing Process* • *OM Workflow Steps in Approval Process* • *How to Cancel a PCR* • *How to Locate a PA PCR* • *PA Business Workplace Dynamic Columns & Layouts* • *PA Business Workplace Overview Tree Functions* • *PA Workflow Inbox* • *PA Workflow Routing Process* • *PA Workflow Steps in Approval Process*

SUMMARY

In this lesson, you learned to:

- Execute the Workflow Report
  - Access and execute the Workflow Report for PA and OM
  - Change the layout of the report
  - Create a variant for the report
  - Retrieve a report variant
  - Modify funding for a position
  - Change the Cost Distribution on a PA Action (as the Funding Approver)

LESSON 6: COURSE REVIEW

Course Objectives

Upon completion of this course, you should be able to:

- Explain the Workflow process for Organizational Management (OM) and Personnel Administration (PA)
- Identify key differences in the routing of Workflow (WF) Items in OM and PA
- Access, navigate and complete items within the Workflow Inbox
- Use Key features to manage OM/PA Workflow Items
- Execute reports

Next Steps

- Monitor the HR-Payroll System communication
  - BEST Shared Services web site

    URL: **https://www.osc.nc.gov/state-employees/BEST**
  - Review conceptual materials
  - Access the Training HELP site

    URL: **https://www.osc.nc.gov/state-agency-resources/training/training_help_documents**
  - Practice what you've learned

    URL: **https://mybeacon.nc.gov**
  - Client 899

    Use your current NCID user name and password

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

Follow the link provided above to access the training client. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed online through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your competency assessment and your evaluation of today's class in the Learning Management System (LMS).

CONGRATULATIONS!

You've completed the course!