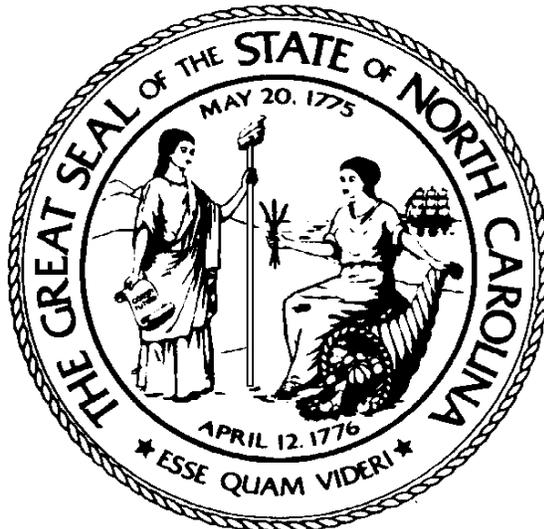


WF220
BEACON SAP Workflow
for Approvers
TRAINING COURSE



State of North Carolina
Office of the State Controller

June 27, 2016

For assistance with any TRAINING needs, contact:

The BEST Shared Services Team

PHONE (RALEIGH AREA): (919) 707-0707

PHONE (TOLL FREE): (866) 622-3784

EMAIL: BEST@osc.nc.gov

TABLE OF CONTENTS

Introduction 1

- Overview 1
 - Pre-requisites 1
 - OSC HR/Payroll Training Curriculum 2
- Strategy for Training 2
- Course Map 3
- Course Objectives 3
- Reference Materials 3

Workflow Overview 5

- Objectives 5
- Purpose of Workflow 5
- Key Terms 5
- HR/Payroll System Workflow Process 7
 - Services for Objects 7
 - Funding Approver in the Workflow Process 7
 - OM Workflow Process 7
 - PA Workflow Process 8
- Workflow Approver Relationships 8

Accessing and Navigating the Workflow Inbox and Outbox 11

- Objectives 11
- Accessing and Navigating the Workflow Inbox (SBWP) 13
 - Options in the Workplace 14
 - The Workflow Inbox 15
 - Workflow Status 15
 - Workflow Status - In Process 16
 - Display and Use the Workflow Header 17
 - Workflow Tracker 17
 - Display the Workflow Log 20
 - Routing to OSHR 22
 - Workflow Status – Return to Initiator (Reject) 23
- OM Workflow Status Overview 25
- PA Workflow Status Overview 26

Approving OM Workflow PCRs 29

- Objectives 29
- Organizational Management (OM) Workflow Process Flow 30
- OM Routing Table 31

Accessing the Workflow Inbox (SBWP).....	33
Opening an OM Workflow PCR	33
Reviewing the PCR on the Header	34
Decision Step.....	34
Rejecting a PCR	35
Canceling an OM PCR (Initiator/Approver)	39
Approving PA Workflow PCRs.....	41
Objectives.....	41
PA Workflow Process Flow	41
Approving PA Actions via the Inbox (SBWP)	42
Workflow Reporting & Troubleshooting.....	51
Objectives.....	51
Workflow Report Overview.....	51
Searching for PCRs	52
Report Options	52
Modify Layout	53
Save Layout.....	53
Use a Layout	54
PCR Troubleshooting	54
Course Review.....	59
Objectives.....	59
Next Steps.....	59
Course Assessment/Evaluation	60

Introduction

Introduction

Lesson 1: Workflow Overview

Lesson 2: Accessing and Navigating the 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

Overview

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

Pre-requisites

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 *BEACON SAP Workflow for Approvers* course.

If you are a Position Approver (Agency and/or Division), you need to take the following course:

- Organizational Management Overview (OM200)

If you are a HR Master Data Approver, you need to take the following course:

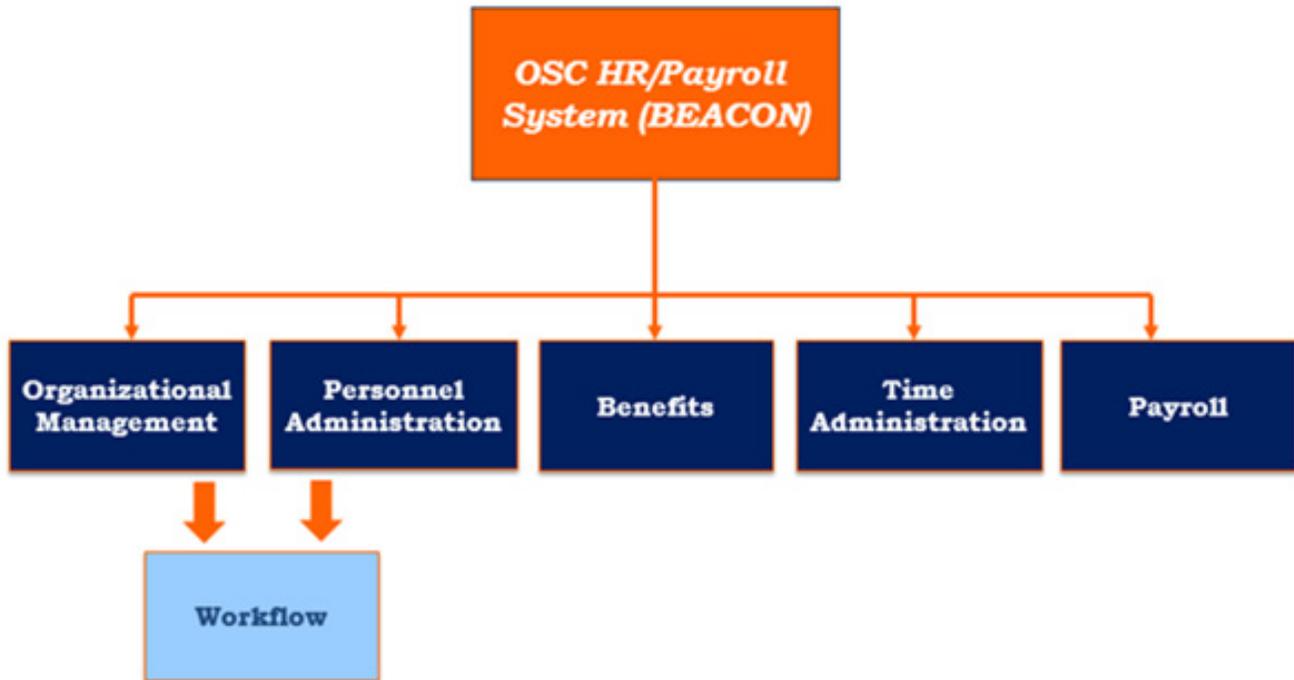
- Personnel Administration Terms Concepts and Display Data (PA210)

Post-requisites

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

- Business Objects Reporting - (BOBJ410)

OSC HR/Payroll Training Curriculum



The OSC HR/Payroll 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 OSC 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 *BEACON 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
- Support Material
 - Business Process Procedures (BPPs)
 - Job Aids
- *What's New*

The material listed above can accessed through the OSC Training HELP website:

<http://www.osc.nc.gov/training/osctd/help/>

Workflow Overview

Introduction

Lesson 1: Workflow Overview

Lesson 2: Accessing and Navigating the 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

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 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 HR/Payroll personnel record.

-
- **Routing Tables:** Both OM and PA have a custom table created for the State of North Carolina within OSC 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 of 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 of the items in the Inbox of the individual for which he or she is substituting.

HR/Payroll System Workflow Process

OM WORKFLOW PROCESS	PA WORKFLOW PROCESS
<ul style="list-style-type: none"> Notes and documents should be included/ attached in the Services for Objects section of the PCR 	<ul style="list-style-type: none"> Notes and documents should be included/ attached in the Services for Objects section of the PCR
<ul style="list-style-type: none"> Agency Funding Approval is the first approval level for most OM PCR's 	<ul style="list-style-type: none"> Agency funding approval is last approval level for most PA PCR's
<ul style="list-style-type: none"> PCR #s begin with 5 (5000000000) 	<ul style="list-style-type: none"> PCR #s begin with 1 (1000000000)
<ul style="list-style-type: none"> After the PCR has been through the entire approval process it does not return to Initiator 	<ul style="list-style-type: none"> PCR returns to Initiator to explicitly complete the Workflow after processing action
<ul style="list-style-type: none"> BEST completes the final step to activate OM actions 	<ul style="list-style-type: none"> After the PCR has been through the entire approval process, it returns to the Initiator to explicitly complete the PCR and work the Action.
<ul style="list-style-type: none"> 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 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.

- When the Initiator executes OM Workflow, the first approval level in the HR/Payroll system is the Agency Funding Approval (Budget Approval).
- OSBM approval is a step in the 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.
- 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

4. The Initiator (Agency) initiates the PCR (Personnel Change Request) and completes the final step after the PCR has been through the entire approval process.
5. 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 OM Processor	

- 📁 OSBM approval is only required for New Position Action (100) and Re-Establish Action (102).
- 📁 OSHR is not an automatic action in the OM Workflow process. The PCR must be manually sent to OSHR.
- 📁 PA Workflow does have some reasons that will automatically be sent to OSHR. See those reasons which are detailed in the *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

Refer to the previous pages in this lesson and draw a line to match the Question with the correct Answer in the table below.

Question	Answer
1. The ___ is the OM or PA user who enters the data for either an OM or PA Action.	First
2. The ___ shows who initiated, who approved and who the next approvers are in the process.	Initiator
3. The ___ answers the question “Who has the Workflow item in their inbox?”.	Last
4. The ___ can be used to identify and track a Workflow item.	Log
5. Workflow approval security is assigned to the ___.	OSBM
6. The Funding approver’s place in the Workflow Approval process in OM is usually ___.	PCR
7. The Funding approver’s place in the Workflow Approval process in PA is usually ___.	Position
8. Approval by ___ in the OM Workflow is necessary for new permanent positions to be created.	Tracker

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

Accessing and Navigating the Workflow Inbox and Outbox

Introduction
Lesson 1: Workflow Overview
***Lesson 2: Accessing and Navigating the 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

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 HR/Payroll System

SCENARIO

You need to log on the HR/Payroll 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 HR/Payroll portal web page.
 - <https://trg-mybeacon.its.state.nc.us>
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.

To be able to display the transaction codes on your screen, you must enable your technical settings.

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

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

11. Right-click on **Favorites**.
12. Select **Insert transaction** from the list. A dialog box is displayed.
13. Enter **PA30** in the text box.
14. Click the green check mark to close the box and add the transaction to your Favorites list.
15. Repeat steps 11-14 to add the following transactions to your Favorites list.
 - PO13
 - ZPA0189
16. Stop when you have added the transactions.

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.
24. The URL has been added to the SAP Favorites folder. Click the URL to access the website you just added.

EXERCISE 2.2: Workflow Overview and Navigation

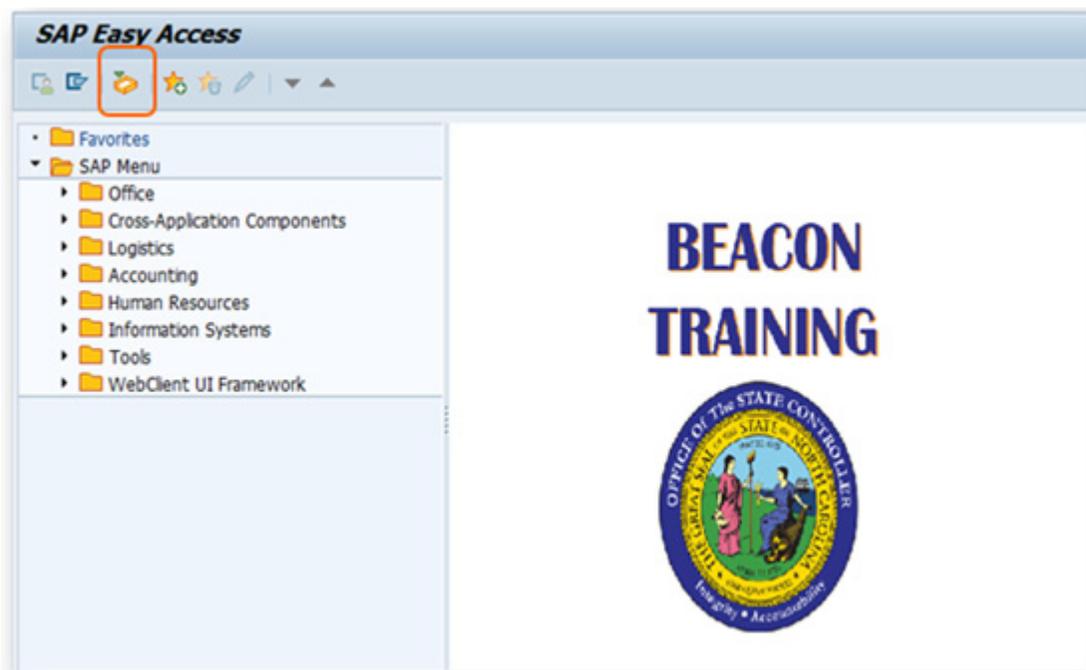
SCENARIO

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)



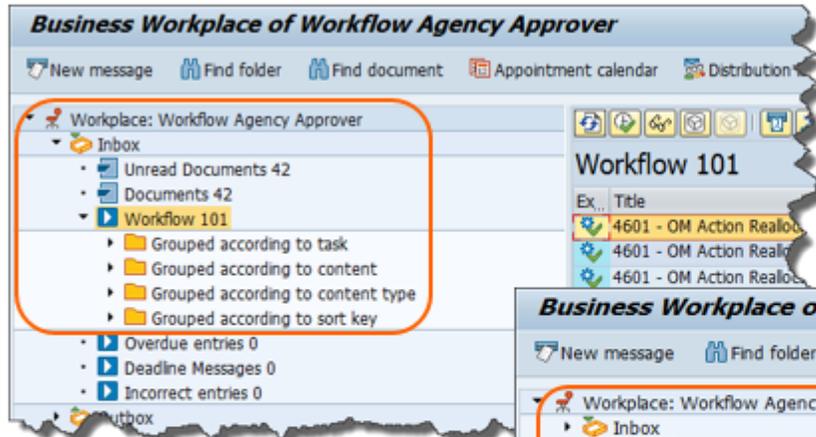
An Approver accesses the Workflow PCRs that have been sent for him or her to take action on via the Workflow option in the Inbox.

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

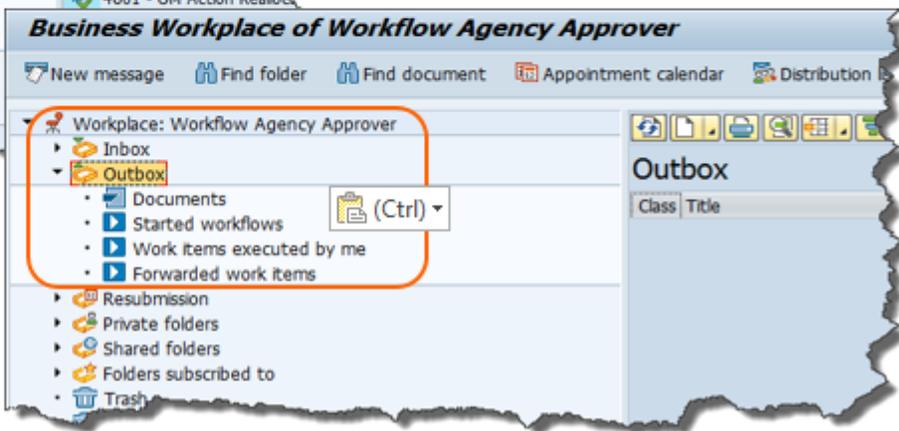
1. Click the **SBWP**  button to access the SAP Business Workplace.
2. Click the node in front of **Inbox**  **Inbox**.
3. Click the **Workflow** folder.

Options in the Workplace

Approver's Inbox



Approver's Outbox



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 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** .

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**  **Inbox** and then the **Workflow** folder.

The Workflow Inbox

The screenshot shows a table of workflow items with the following callouts:

- Menu toolbar**: Points to the top navigation icons.
- # of PCRs to be processed**: Points to the 'Ex.' column header.
- Type of Action**: Points to the 'Title' column.
- PCR Status**: Points to the 'Status' column.
- When PCR entered that Inbox**: Points to the 'Creation Da...' and 'Creation ...' columns.
- OM or PA**: Points to the 'Title' column.
- Position or Personnel #**: Points to the 'Title' column.
- PCR**: Points to the 'PCR' field in the title.

Ex.	Title	Status	Creation Da...	Creation ...	P At.	Co.	W.
4601	OM Action Reallocate Position Up for Position - 65002236 PCR: 5000002080	Ready	01/15/2016	10:53:09	5		
4601	OM Action Reallocate Position Up for Position - 65002235 PCR: 5000002079	Ready	01/15/2016	10:53:03	5		
4601	PA Action - Promotion (NC) for Allison Sellers14 PCR: 1000005307	Ready	01/13/2016	11:18:27	5		
4601	OM Action Reallocate Position Up for Position - 65002233 PCR: 5000002077	Ready	01/15/2016	10:52:47	5		
4601	PA Action - Salary Adjustment (NC) for Nancy Gonzalez20 PCR: 1000005333	Ready	01/14/2016	11:33:36	5		
4601	OM Action Reallocate Position Up for Position - 65002231 PCR: 5000002075	Ready	01/15/2016	10:52:36	5		
4601	OM Action Reallocate Position Up for Position - 65002230 PCR: 5000002074	Ready	01/15/2016	10:52:28	5		

Workflow Status

A graphical icon shows the status of a PCR at a glance. There are five 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 only displayed 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 <i>Cancel and keep work item in inbox</i> , 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.
Executed		
Completed		The execution of the PCR is completed and is no longer displayed in the Workflow inbox of the Business Workplace.

Choose one of the following alternatives

- Approve change
- Return to initiator
- Send to OSHR
- Cancel and keep work item in inbox

Workflow Status - In Process

Tips & tricks: Group Work Items According to Tasks

4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez01 PCR: 1000005314

Description
Workflow status: **In Process**

Please review the information in this screen and make one of the following choices:

Objects and attachments

- PA PCR: Nancy Gonzalez01 PCR:1000005314
- PCR List: Workflow Tracker

Workflow status (2) 6 Entries found

WF Status	Short Descript.
N	In Process
R	Rejected
C	Canceled
A	Approved
D	Created
M	Completed

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 canceled.

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 canceled 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

- 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.

4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez20 PCR: 1000005333

Click the title of the OM or PA Header Link

Objects and attachments

- [PA PCR: Nancy Gonzalez20 PCR:1000005333](#)

1

Reallocate Position Up - DISPLAY

Position Header: 4601475 Correctional Officer Org Unit: 21 0001 02 Unit Section: 8
 PCR Number: 1000005333 Reports To: 11 0001 47 Business Systems Manager - M03 App
 Valid From: 11/15/2009 To: 12/31/2009 Department: 21 001 4 00 Work Line Number: 8
 Holder: Personnel Area: 4291 Connection: WF Status: N In Process

Position Relationships: Current Values New Values
 Job: 00000004 CORRECTIONAL OFFICER 2004714 WELSPURHERES TECHNICIAN I
 Reports To: 510

Employee Group/Subgroup: Employee group: SPA EE subgroup: 41

OM Action Request

Pay Scale: Pay Grade
 City Grouping: USA Graded: N
 Pay grade type: 01 Graded
 Pay grade area: 01 Annual Salaries
 Pay grade: 0402
 Pay grade level: 04 To: 04
 Current rate: 27,204.00
 Pay grade: 7a 42,418.00
 Reference salary: 34,587.00
 Time unit: Annually

2

Employee Action Request

CR Number: 10000571
 Personal Number: Mary-g3 Poppins-g3 Action: 27 Non-Beacon to Beacon(NC)
 Last 4 digits(BEN): 5633 Mary-g3 Poppins-g3 Reason: 01 Transfer Later
 Effective on: 06/25/2009 Chg: 06/25/09 24F(NORPA00) St: A Approved

CURRENT PROPOSED
 Pers.Area: 4491 Cultural Resources Pers.Area: 4491 Cultural Resources
 Subarea: 001 Subarea: 001 Job Name: Job Name

EE Group: EE Group: A SPA Employees
 EE Subgroup: EE Subgroup: Term

Org Unit: 00000000 Programs
 Job: 00000000
 EE Position: 00000000 EE Position: 00011001 Office Assistant IV
 Non-Agreed

Basic Pay
 Pay Scale type: 01 Graded Pay Scale type: 01 Graded
 Pay Scale Area: 01 Annual Salaries Pay Scale Area: 01 Annual Salaries
 Pay Scale Group: Level: Level: GA
 Annual Salary: 0.00 Hly Sal: 0.00 Annual Salary: 42,580.00 Hourly Salary: 0.00
 Calc: Step - Z 100.00
 Min: 24,585.00
 Max: 37,150.00 Next In Dolo:

Dates
 Last day worked:

PA Action Request

When you receive a PCR in your Inbox, you should obviously review the OM or PA Action prior to approving or returning it. Click the link for the Header in order 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.

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

Workflow Tracker

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

4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez20 PCR: 1000005333

Select the Workflow Tracker link

Description

Workflow status: In Process

1

Please review the information screen and make one of the following choices:

Objects and attachments

- PA PCR: Nancy Gonzalez20 PCR:1000005333
- PCR List: Workflow Tracker

The Workflow Tracker is a link in the bottom right of the Inbox or Outbox screen (you may have to scroll in order 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).

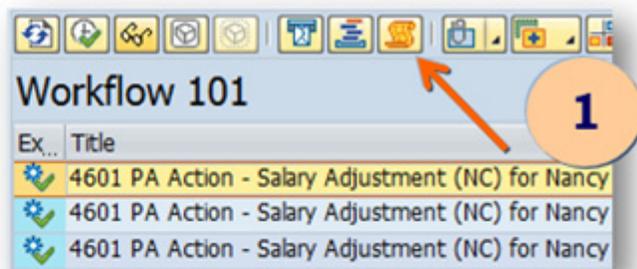
The Detail section of the Tracker will list these attributes:

- 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

Click **Log** to view potential Approvers who are next in line for the PCR



Workflow and task	Details	Graphic	Agent	Status
4601 PA Action Approval WF for Nancy Gonzal				In Process
• Load approvers - Custom relations				Completed
4601 - PA Action Salary Adjustment (NC) A				In Process
• PCR # 1000005333 Set to 'AA1' Appro				Completed
• 4601 PA Action - Salary Adjustment (NC)				Ready

Click **Agents** to view the list of Approvers for that step

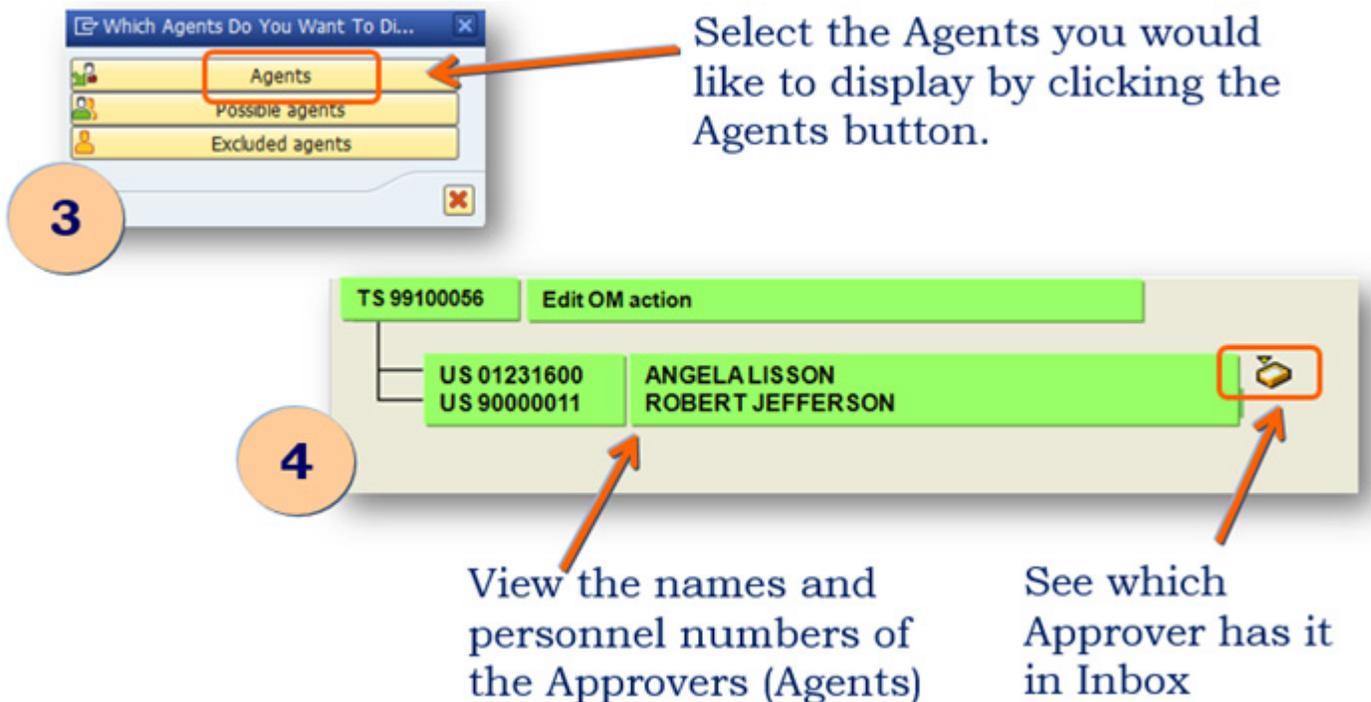


14. SINGLE-click the **PA Action - Salary Adjustment for Nancy Gonzalez** (as assigned by your instructor).
15. Click the **Log** button as identified above. This will allow you to view potential Approvers who are next in line for the PCR.

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 READY status.

17. Click the **Agents**  button on the pop-up box view the possible approvers available to approve this workflow.

The Workflow Log illustrated above (note 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.

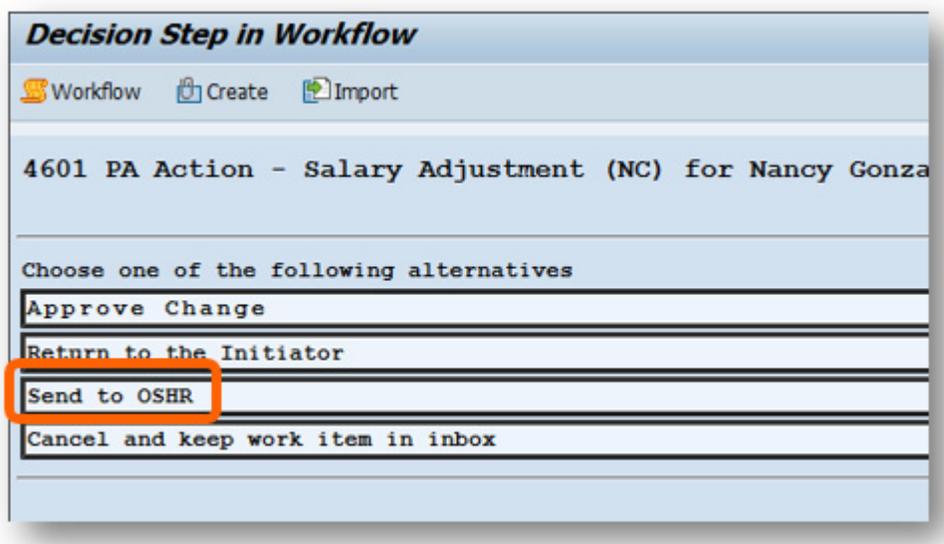
18. Click the **red X** to close the pop-up box.

19. Close the Click the **Back**  button to return to the Workflow inbox.

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

Routing to OSHR

20. 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 not 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).

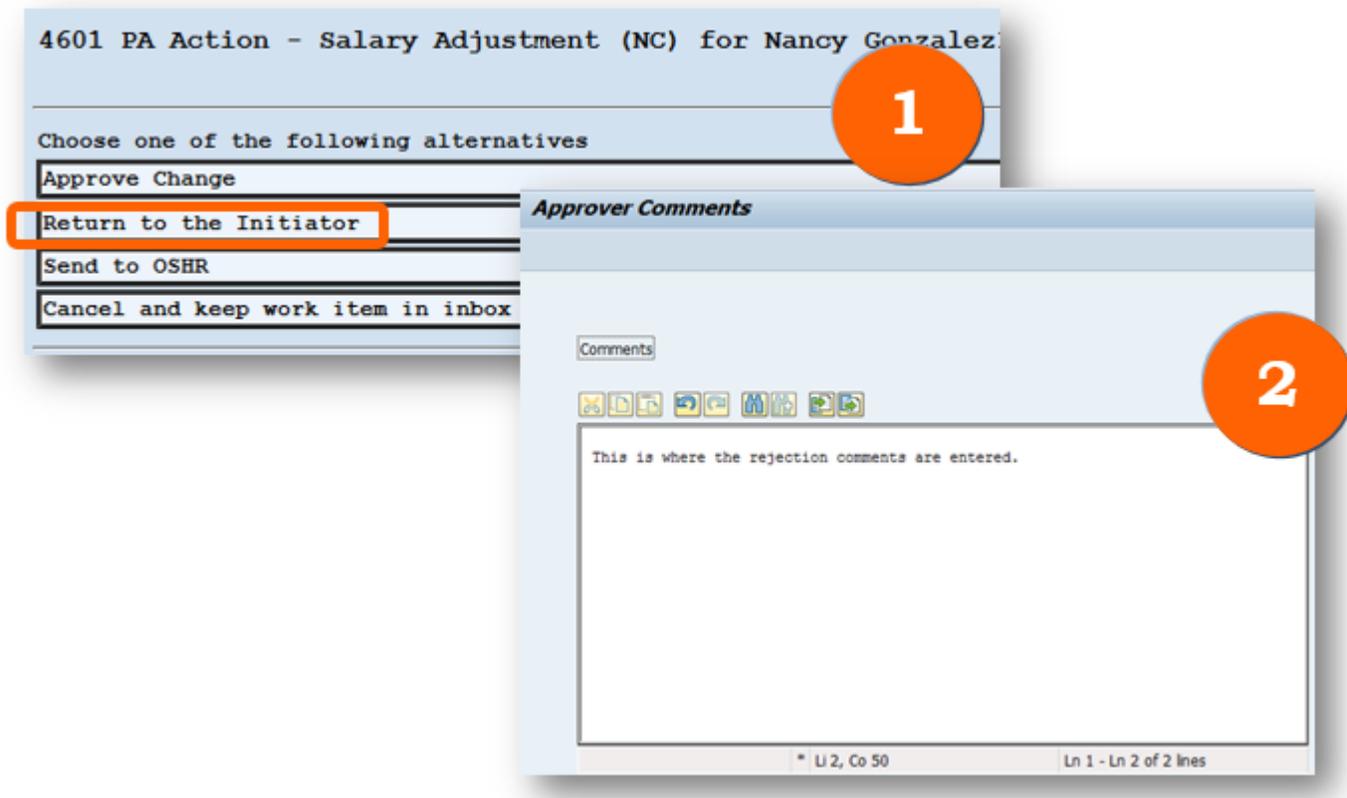
📁 **NOTE:** PA has several reasons that are routed to OSHR. For further information, check the *PA Actions Reasons Definitions Job Aid* located on the Training HELP page in the PA > Job Aids folder.

21. Listen only (Do not click or process) 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)

22. Watch as your instructor demonstrates the Routing to OSHR 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, you do not have to 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 readily apparent that a PCR has been rejected.

Ex..	Title	Status	Creai
	4601 REJECTED PA Action - Reallocation (NC) for Eunice Rivera...		01/19

23. SINGLE-click **Cancel and keep work item in inbox**. The screen redisplayes the Workflow inbox.
24. Click the **Outbox > Work items executed by me** folder.
25. Return to the Workflow folder by clicking the **Workflow** folder.

Additional Resource

You can find several additional support materials about OM and PA Workflow on the OSC Training HELP website:

<http://www.osc.nc.gov/training/osctd/help/index.html>

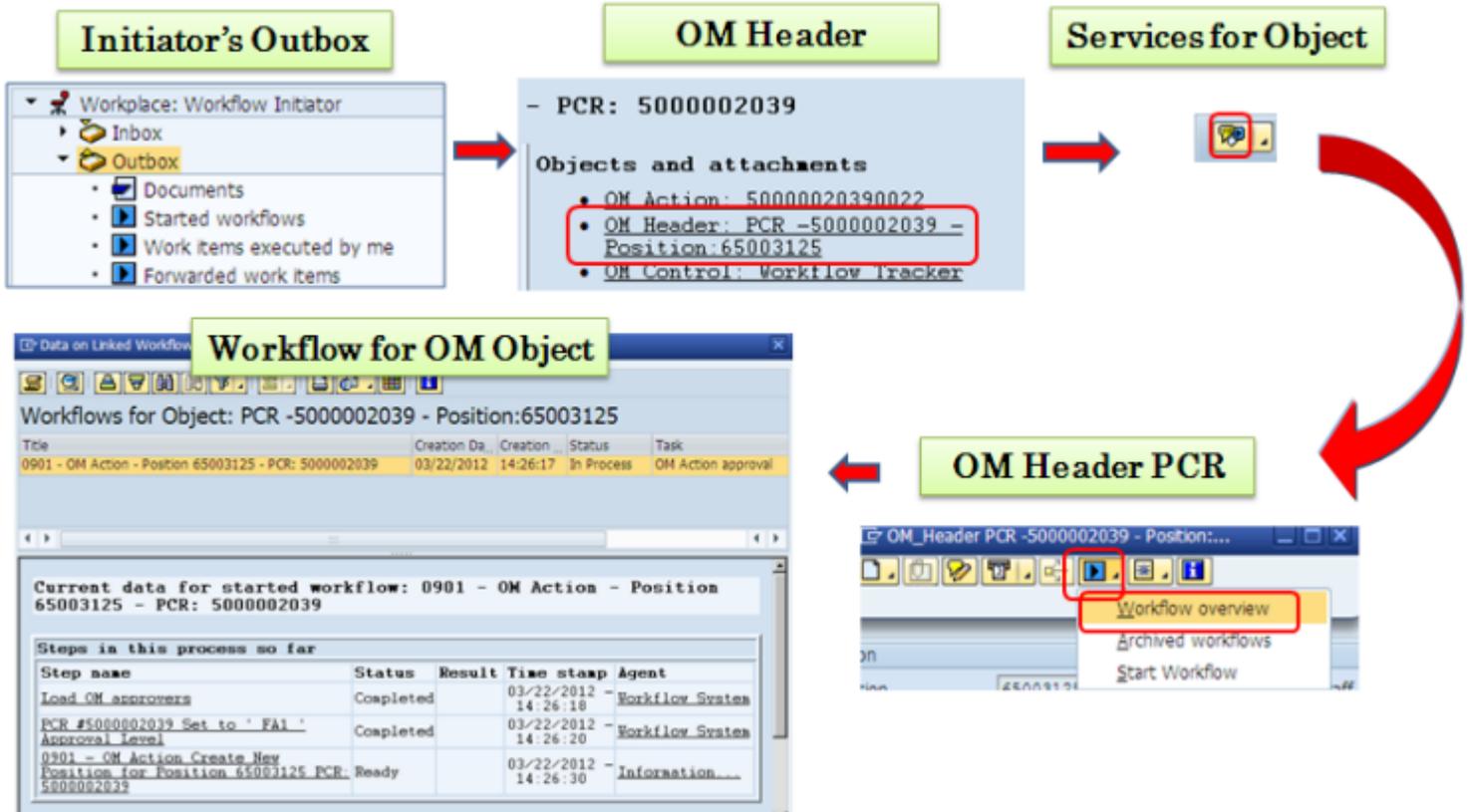
Follow the following path to access the latest version of the job aids:

- Organization Management > Job Aids*
 - How to Locate an OM PCR
- Personnel Administration > Job Aids*
 - How to Locate a PA PCR
- Personnel Administration > Job Aids*
 - Business Workplace Button Functions

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

This exercise is complete.

OM Workflow Status Overview



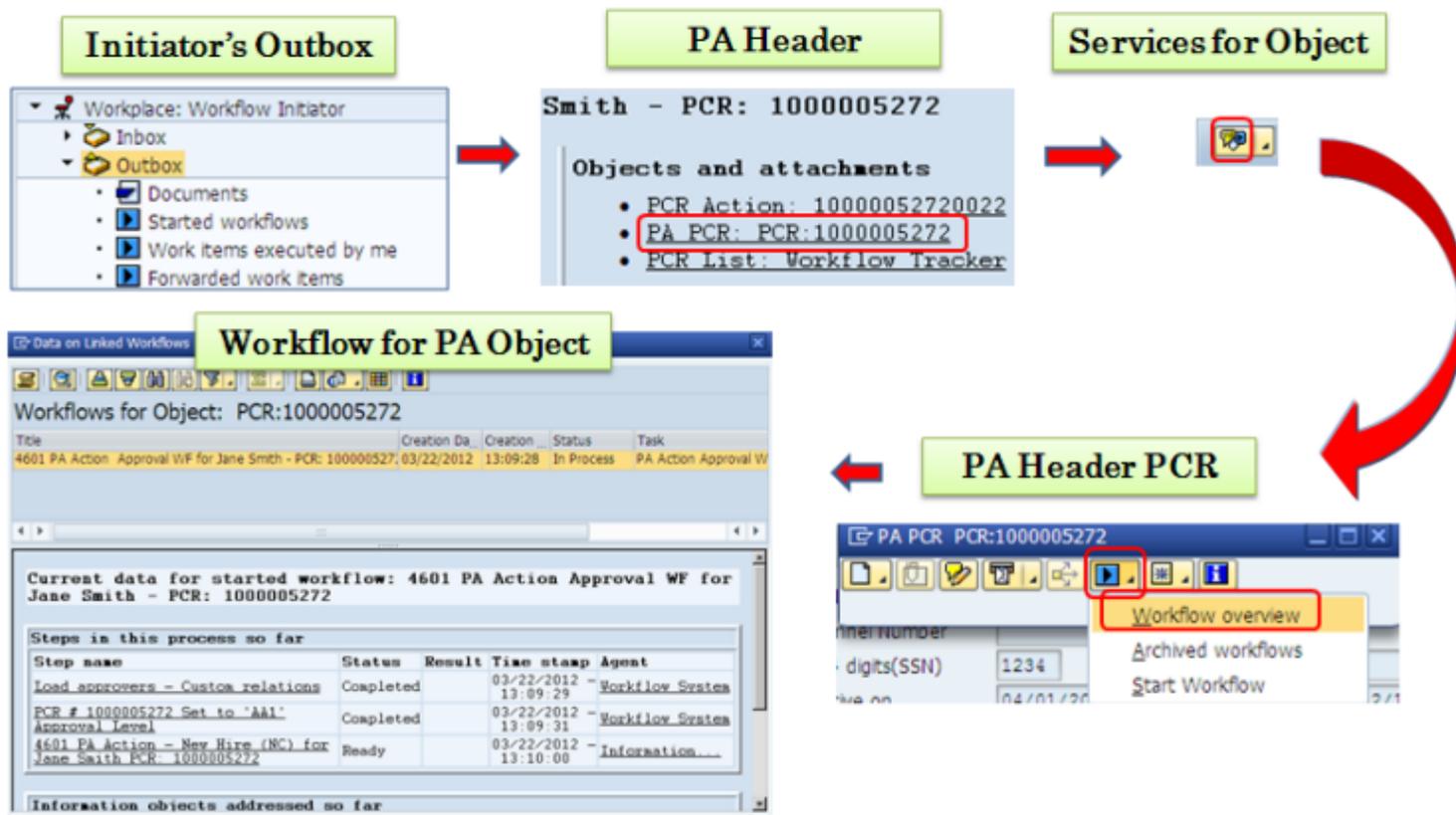
For the Initiator, there is an additional way to access the workflow status of an **OM** PCR.

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 wish 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 an **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.

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 wish to display.
4. At the bottom right-hand area of the screen, SINGLE-click the PA PCR. The Employee Action Request 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.

KNOWLEDGE CHECK

Answer	Question
	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 only available 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

Approving OM Workflow PCRs

Introduction

Lesson 1: Workflow Overview

Lesson 2: Accessing and Navigating the Workflow Inbox and Outbox

Lesson 3: Approving OM Workflow PCRs

Lesson 4: Approving PA Workflow PCRs

Lesson 5: Workflow Reporting & Troubleshooting

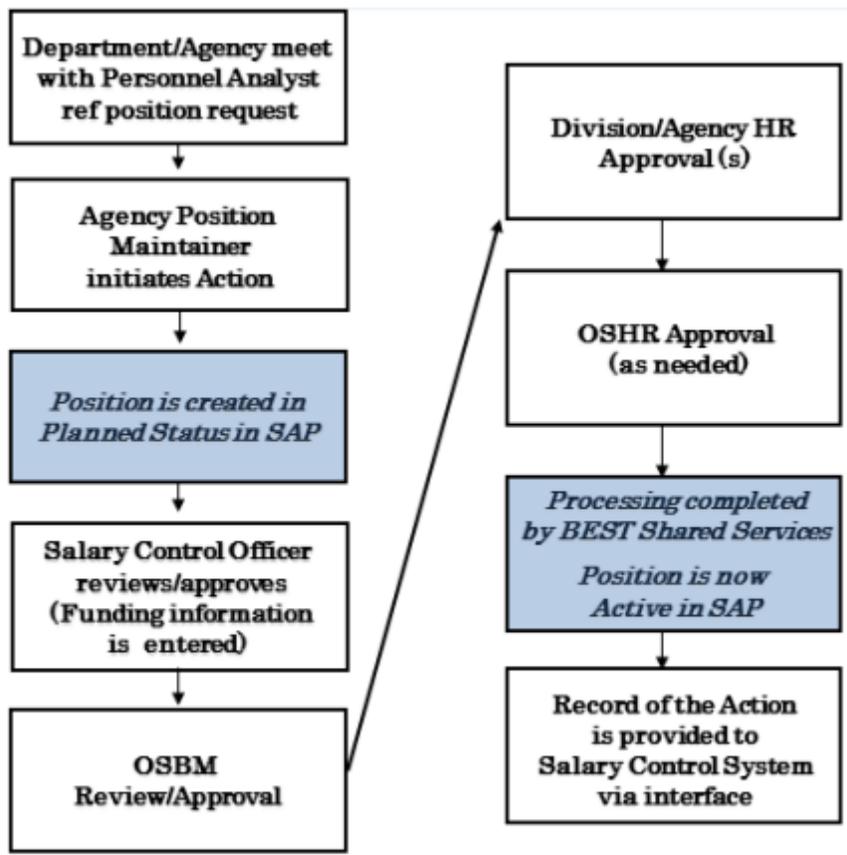
Lesson 6: Course Review

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 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.

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

Action	Action Description
100	Create New Position

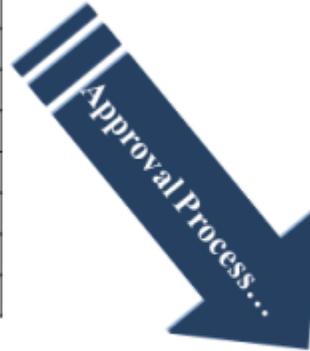


Agency Position Funding Approver
Office of State Budget Management (OSBM)
Agency Division Approver (optional)
Agency OM Position Approver
Office of State Human Resources (OSHR)... if required
BEST Shared Services

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 Resource

You can find several additional support materials about Workflow buttons and functions on the OSC Training HELP website:

<http://www.osc.nc.gov/training/osctd/help/index.html>

Follow the following path to access the latest version of the job aids:

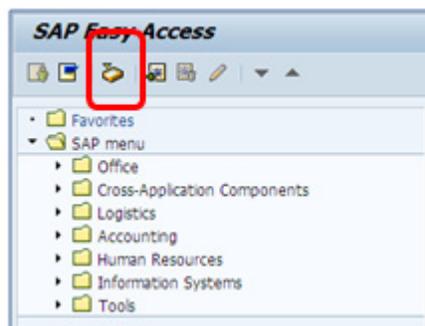
Organization Management > Job Aids

- OM Workflow Routing Process Job Aid
- OM Workflow Steps in Approval Process Job Aid

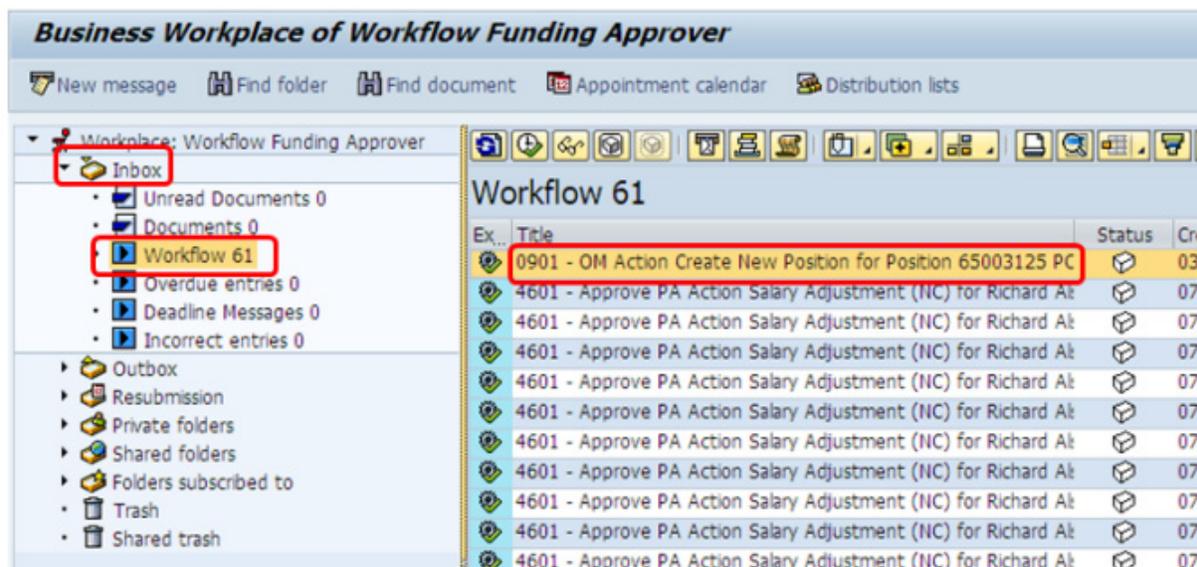
Accessing the Workflow Inbox (SBWP)

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 of 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 Inbox to expand it.
2. DOUBLE-click Workflow. All of 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 Resource

You can find several additional support materials about Workflow buttons and functions on the OSC Training HELP website:

<http://www.osc.nc.gov/training/osctd/help/index.html>

Follow the following path to access the latest version of the job aids:

Organization Management > Job Aids

- Business Workplace Button Functions
- Business Workplace Overview Tree Functions

Reviewing the PCR on the Header

4601 - OM Action Reallocate Position Up for Position - 65002236 PCR: 5000002080

<p>Description</p> <p>Workflow status: Approved</p> <p>Please review the information in this screen and make your choice as follows:</p> <p>Approve change - the request will continue onto the next approver or processor.</p>	<p>Objects and attachments</p> <ul style="list-style-type: none"> • OM Header: PCR -5000002080 - Position:65002236
--	--

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 can also 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

Decision Step in Workflow

Workflow Create Import

4601 PA Action - Appointment Change (NC) for Leona Grayson20 PCR: 1000005274

Choose one of the following alternatives

- Approve Change
- Return to the Initiator
- Send to OSHR
- Cancel and keep work item in inbox

<p>Description</p> <p>Workflow status: In Process</p> <p>Please review the information in this screen and make one of the following choices:</p>	<p>Objects and attachments</p> <ul style="list-style-type: none"> • PA_PCR: Leona Grayson20 PCR:1000005274 • PCR_List: Workflow Tracker
--	--

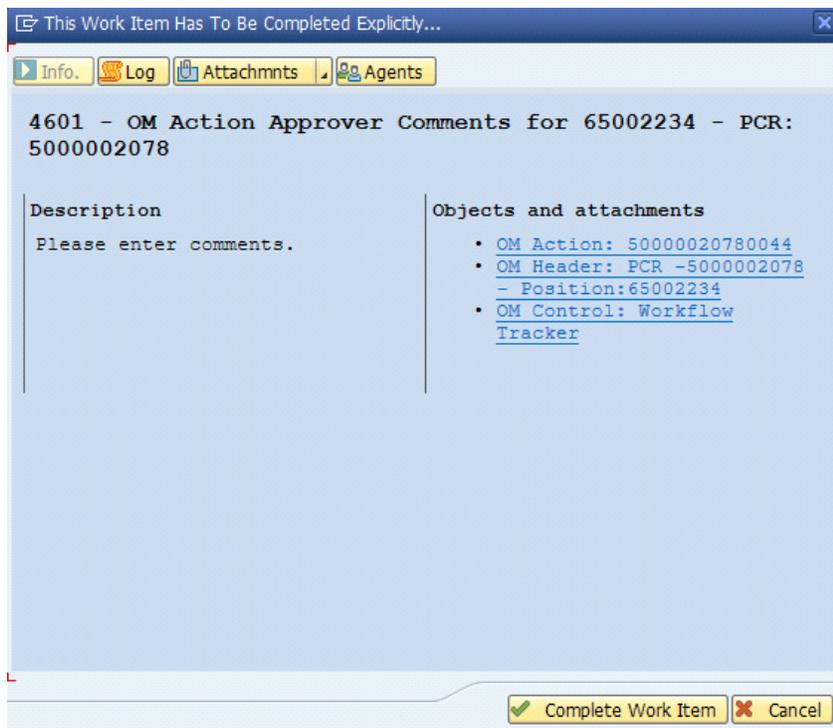
After the PCR is executed, the Decision Step in Workflow screen is displayed. The Approver can also view the Header and Tracker from this screen. The Approver can either Approve, Return to Initiator (reject), or Cancel and keep the work item in the Inbox.

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 appear. 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.



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

Access the Business Process Procedure (BPP) from the Training HELP website <http://www.osc.nc.gov/training/osctd/help/>. Follow along with the BPP to complete the exercise.

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 PCR's that have been sent to the Inbox display.
5. Click one time (do not double-click) the **applicable PCR** below as assigned to you by your instructor:

PCR #: <i>Reallocate Up - Barbara Phillips' Position</i>							
A	5000002061	F	5000002066	K	5000002071	P	5000002076
B	5000002062	G	5000002067	L	5000002072	Q	5000002077
C	5000002063	H	5000002068	M	5000002073	R	5000002078
D	5000002064	I	5000002069	N	5000002074	Inst 1	5000002079
E	5000002065	J	5000002070	O	5000002075	Inst 2	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.

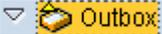
14. Click the **Back button**  to return to the Business Workplace for Approver screen.

15. With the applicable PCR still selected, click the **Execute** button  (or double-click the PCR line item). Observe that you can also 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** 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

Access the Business Process Procedure (BPP) from the Training HELP website <http://www.osc.nc.gov/training/osctd/help/>. Follow along with the BPP to complete the exercise.

- 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.

- Click one time (do not double-click) the **applicable PCR** below as assigned to you by your instructor:

PCR #: <i>County Change on Vera Glover's Position</i>							
A	5000002040	F	5000002045	K	5000002050	P	5000002055
B	5000002041	G	5000002046	L	5000002051	Q	5000002056
C	5000002042	H	5000002047	M	5000002052	R	5000002057
D	5000002043	I	5000002048	N	5000002053	Inst 1	5000002058
E	5000002044	J	5000002049	O	5000002054	Inst 2	5000002059

- 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.
- Review the information. Observe that you can view the information but cannot make any changes to the data.
- 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.
- Select **Attachment List**. The Services: Attachment list pop-up is displayed.
- 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.
- Click  to close the Display note pop-up.
- Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
- Click the **Back** button  to return to the Business Workplace for Approver screen.
- 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. At this time, you decide that you still have more research to do, and so you are not ready to put the PCR back into Workflow.
- Click the **Display Workflow Log** button  to view who the Approvers are and the time stamp of their approval.
- From the "View WF Chronicle" Tab, click the **Agents** button  **Ready** next to Ready to view the options.
- Click  **Agents**. This allows you to see the Approvers who would have been able to approve 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)

1 WF saved, not initiated:
– Contact BEST and they will delete infotypes created in Planned status

2 WF initiated but not through final approval – Approver cancels by returning to Initiator

4601 - OM Action Reallocate Position Up for Posit

Choose one of the following alternatives

- Approve change
- Return to initiator**
- Send to OSP
- Cancel and keep work item in inbox

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 Canceled 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 canceled.

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

Choose one of the following alternatives

- Cancel OM Action
- Change and Resubmit
- Cancel and keep work item in inbox

KNOWLEDGE CHECK

Answer	Question
	1. ___ approval is not required for temporary positions.
	2. The <i>Send to OSHR</i> option is not an automatic step and is only available at the ___ approval level (depending on Agency Delegation of Authority).
	3. When the Workflow item is saved, the HR/Payroll system assigns a ___.
	4. The ___ Approver enters Cost information and budgeted salary.
	5. The <i>Cancel and keep the work item in inbox</i> 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

Approving PA Workflow PCRs

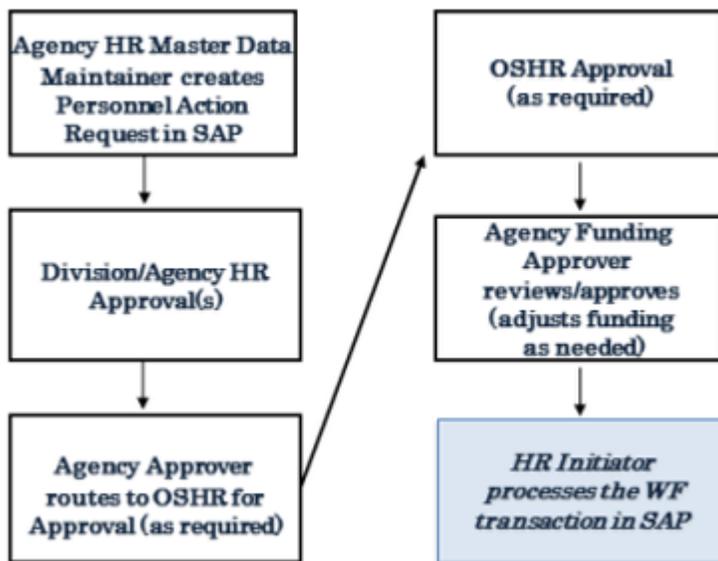
Introduction
Lesson 1: Workflow Overview
Lesson 2: Accessing and Navigating the Workflow Inbox and Outbox
Lesson 3: Approving OM Workflow PCRs
Lesson 4: Approving PA Workflow PCRs
Lesson 5: Workflow Reporting & Troubleshooting
Lesson 6: Course Review

Objectives

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

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 OSC 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 of 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 Resource

You can find several additional support materials about Workflow buttons and functions on the OSC Training HELP website:

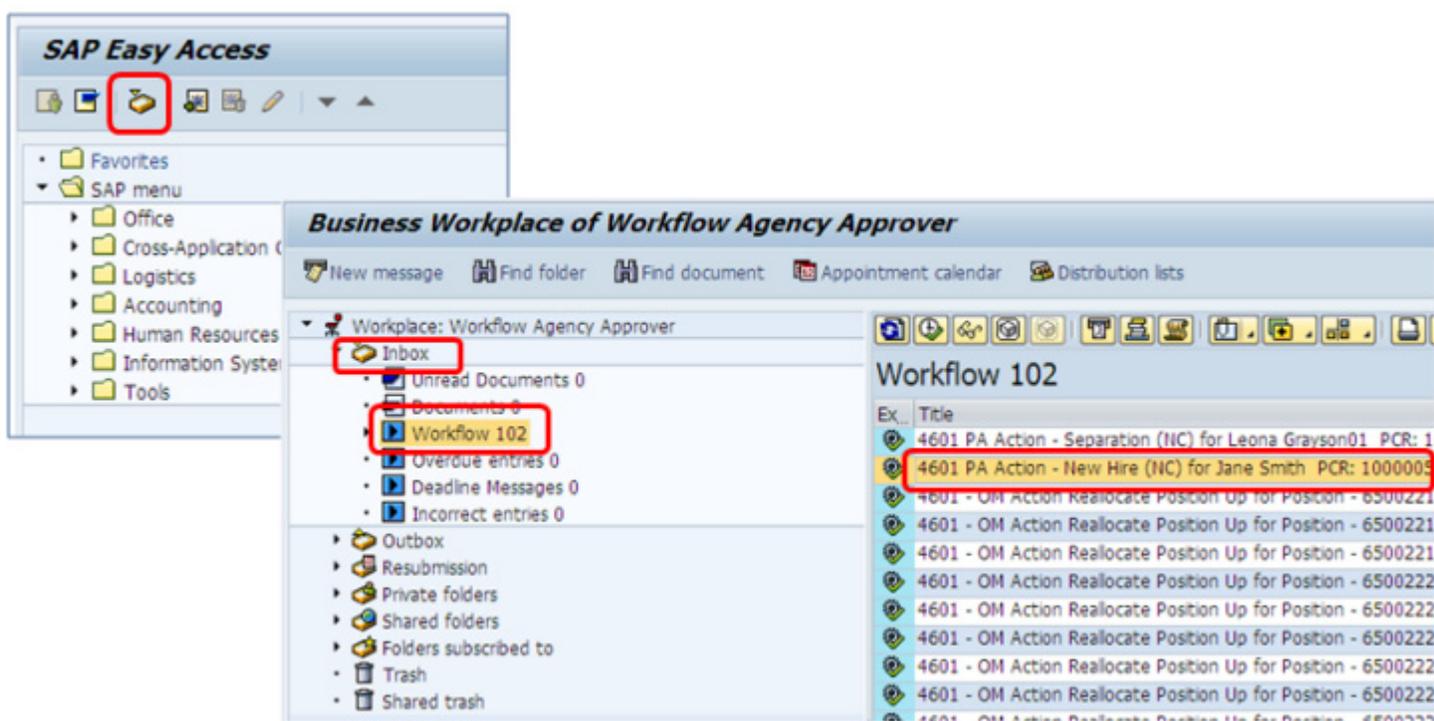
<http://www.osc.nc.gov/training/osctd/help/index.html>

Follow the following path to access the latest version of the job aids:

Personnel Administration > Job Aids

- Business Workplace Button Functions
- Business Workplace Overview Tree Functions

Approving PA Actions via the Inbox (SBWP)



Approving PA Actions is, in many ways, similar to 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. You need to approve it. 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

- Using information learned in previous exercises and your data sheet, 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							
A	1000005294	F	1000005299	K	1000005304	P	1000005309
B	1000005295	G	1000005300	L	1000005305	Q	1000005310
C	1000005296	H	1000005301	M	1000005306	R	1000005311
D	1000005297	I	1000005302	N	1000005307	Inst 1	1000005312
E	1000005298	J	1000005303	O	1000005308	Inst 2	1000005313

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

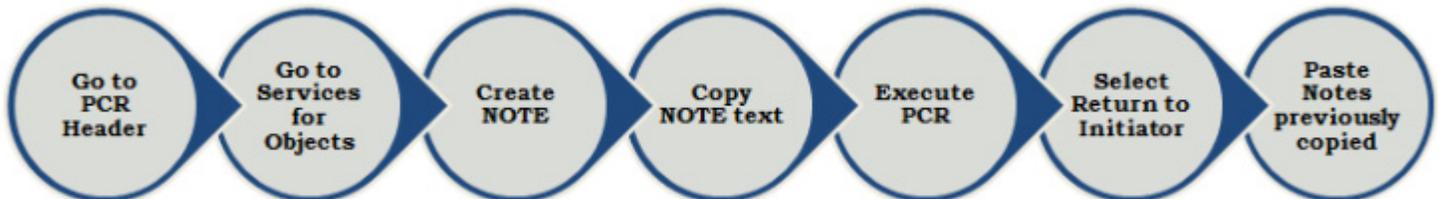
A PCR to give a salary adjustment to Nancy Gonzalez has been sent to your Inbox. Review the PCR and accompanying note, and then reject it. You will be required to write a note explaining to the Initiator why you are rejecting the PCR. In this exercise, you are the PA Division/Agency Approver.

Rejecting PCRs

The 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.

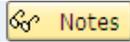
BEST BUSINESS PRACTICE: A good practice to perform is to enter the rejection comments, not only in the mandatory pop-up box for the comments, but also in the PA PCR Services for Objects as well. This creates a sort of “one-stop” location for all comments about the PCR.



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 #: <i>Salary Adjustment: Nancy Gonzalez</i>							
A	1000005314	F	1000005319	K	1000005324	P	1000005329
B	1000005315	G	1000005320	L	1000005325	Q	1000005330
C	1000005316	H	1000005321	M	1000005326	R	1000005331
D	1000005317	I	1000005322	N	1000005327	Inst 1	1000005332
E	1000005318	J	1000005323	O	1000005328	Inst 2	1000005333

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 8 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 eventually 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 #: <i>Cancel Suspension: Ronald Barr</i>							
A	1000005274	F	1000005279	K	1000005284	P	1000005289
B	1000005275	G	1000005280	L	1000005285	Q	1000005290
C	1000005276	H	1000005281	M	1000005286	R	1000005291
D	1000005277	I	1000005282	N	1000005287	Inst 1	1000005292
E	1000005278	J	1000005283	O	1000005288	Inst 2	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 merely 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 merely 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 a PCR and Approve It

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 #: <i>County Change on Vera Glover's Position</i>							
A	5000002040	F	5000002045	K	5000002050	P	5000002055
B	5000002041	G	5000002046	L	5000002051	Q	5000002056
C	5000002042	H	5000002047	M	5000002052	R	5000002057
D	5000002043	I	5000002048	N	5000002053	Inst 1	5000002058
E	5000002044	J	5000002049	O	5000002054	Inst 2	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.

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

PCR #: <i>Cancel Suspension: Ronald Barr</i>							
A	1000005274	F	1000005279	K	1000005284	P	1000005289
B	1000005275	G	1000005280	L	1000005285	Q	1000005290
C	1000005276	H	1000005281	M	1000005286	R	1000005291
D	1000005277	I	1000005282	N	1000005287	Inst 1	1000005292
E	1000005278	J	1000005283	O	1000005288	Inst 2	1000005293

- Return to the SAP Easy Access screen.

This exercise is complete.

Additional Resource

You can find several additional support materials about Workflow buttons and functions on the OSC Training HELP website:

<http://www.osc.nc.gov/training/osctd/help/index.html>

Follow the following path to access the latest version of the job aids:

Personnel Administration > Job Aids

- PA Workflow Inbox
- PA Workflow Routing Process
- PA Workflow Steps in Approval Process

KNOWLEDGE CHECK

Answer	Question
	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

Workflow Reporting & Troubleshooting

Introduction

Lesson 1: Workflow Overview

Lesson 2: Accessing and Navigating the 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

Objectives

- Explain common error 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
- The **Workflow Report Job Aid** is located in both the OM and PA folder on the OSC Training HELP website. Access the job aid online at: <http://www.osc.nc.gov/training/osctd/help/>
Locate the Job Aids sub-folder. You will find the Job Aid there.

Searching for PCRs

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

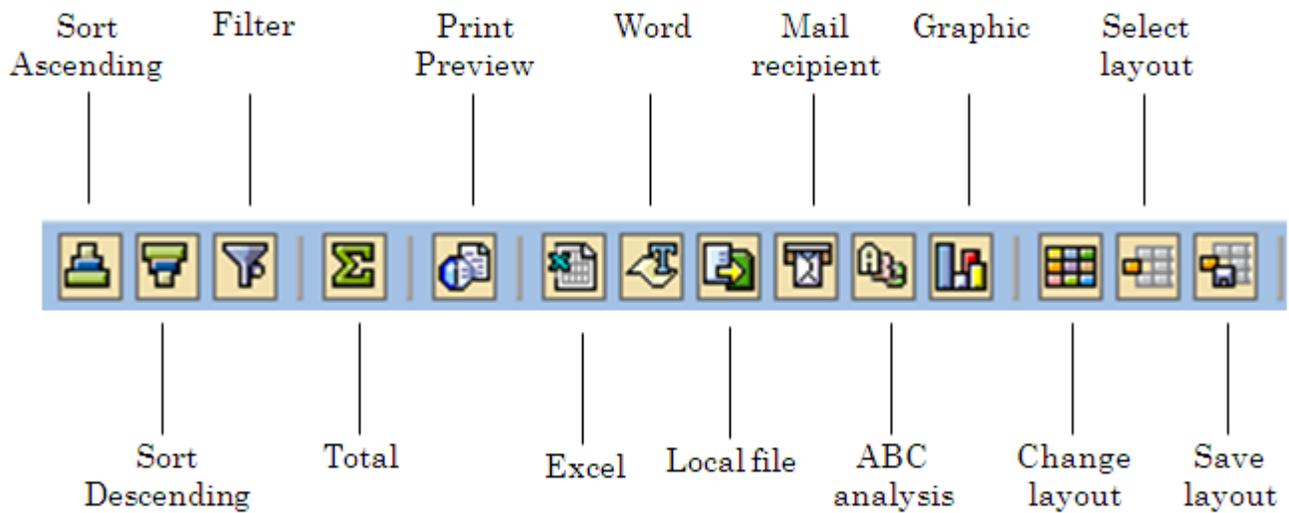
PA

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

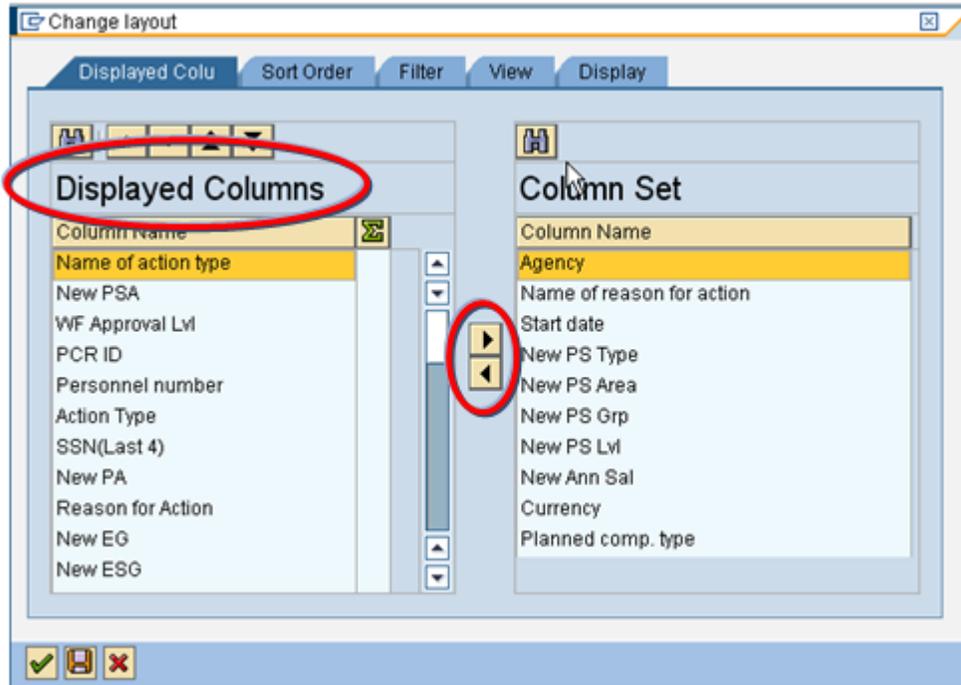
OM

- 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 has to 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.
-  If an approver who is out of the office has PCRs they have reserved, the Agency can submit a ticket to BEST Shared Services to have a Workflow substitution granted. The user that 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

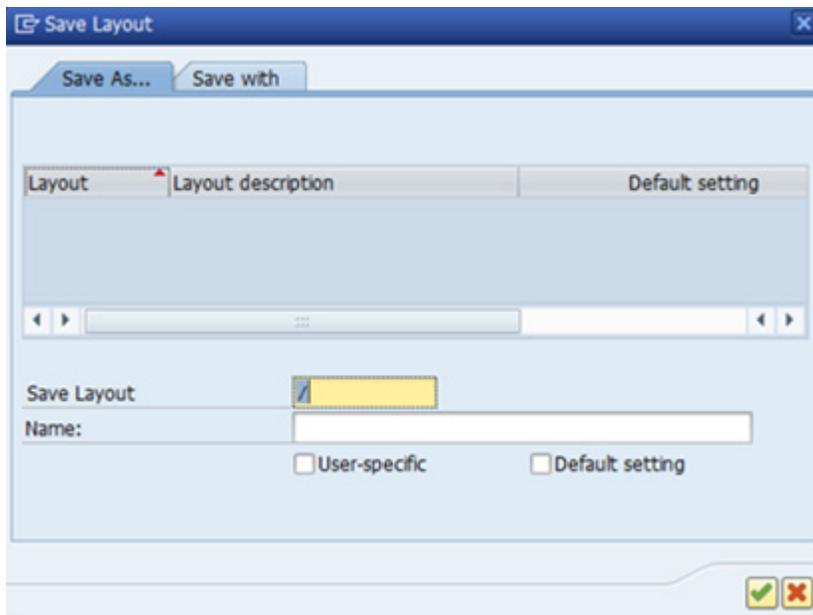
You need to see if there are any Suspension and Reallocation Actions awaiting approval for the Natural & Cultural Resources Personnel Area. In addition, you want to change and save the layout to your specifications.

 **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

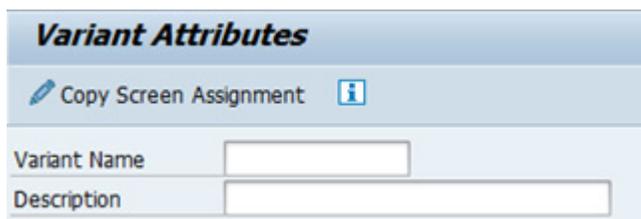
- Click the **Save Layout**  button.



- 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.
- In the Name field enter **xx (your initials) Training**.
- 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.
- Click the **green check**. A message displays indicating that the layout is saved.
- Click the **Back** button to return to the Report criteria screen.

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

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



- Create a **name** in the Variant name field.
- Create a **description** of the report in the Description field that identifies the purpose of the report.
- 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

<p>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.</p>
--

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 executing the report, you can still apply the layout after you are in the report. To do so, click the Select layout button and choosing the applicable saved layout.

This exercise is complete.

Additional Resources
<p>You can find several additional support materials about Workflow buttons, functions, and reports on the OSC Training HELP website:</p> <p style="text-align: center;">http://www.osc.nc.gov/training/osctd/help/index.html</p> <p>Follow the following path to access the latest version of the job aids:</p> <p><i>Organization Management > Job Aids</i></p> <ul style="list-style-type: none"> • Business Workplace Button Functions • How to Locate 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 <p><i>Personnel Administration > Job Aids</i></p> <ul style="list-style-type: none"> • Business Workplace Button Functions • 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)

Course Review

Introduction

Lesson 1: Workflow Overview

Lesson 2: Accessing and Navigating the Workflow Inbox and Outbox

Lesson 3: Approving OM Workflow PCRs

Lesson 4: Approving PA Workflow PCRs

Lesson 5: Workflow Reports

Lesson 6: Course Review

Objectives

- 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 (especially the Updates tab)
URL: <http://www.osc.nc.gov/BEST/index.html>
 - BEACON Training website: **What's New** link
URL: http://www.osc.nc.gov/beacon/training/whats_new.html
- Review conceptual materials
- Access the Training HELP site
URL: <http://www.osc.nc.gov/training/osctd/help>
- Practice what you've learned
URL: <http://mybeacon.nc.gov>
 - Client 899
 - Use your current NCID user name and password

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

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 through the HR/Payroll Portal. 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 on line through the web link in the steps above.

Course Assessment/Evaluation

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

CONGRATULATIONS!

You've completed the course!