

Transactions

- ZPAA076
- SWBP
- PA30



PA BPP

PROMOTION ACTION

Change Record:

Change Date: 10/25/2011	Changed by: w.creech
Changes:	<p>Combined previous BPPS (Initiate Promotion and Complete Promotion) into one BPP (Promotion Action)</p> <p>Tips and Tricks updated</p> <ul style="list-style-type: none"> • Information added: PA Tips and Tricks Job Aid <p>Step 6</p> <ul style="list-style-type: none"> • Data Table: revised <i>EE Position</i> Description text to read <i>New Position number...</i> <p>Step 28</p> <ul style="list-style-type: none"> • New Error message added: <i>Person and position have different employee groups/subgroups</i> <p>Step 32</p> <ul style="list-style-type: none"> • New Caution box added <p>Step 35</p> <ul style="list-style-type: none"> • New Information box added <p>Step 36</p> <p><u>Par 2</u></p> <ul style="list-style-type: none"> • Text updated to read: <i>The Work Schedule Rule and Time Mgmt status defaults from the employee's enterprise structure.</i> <p><u>Par 3</u></p> <ul style="list-style-type: none"> • Text updated to read: <i>If the individual is part-time, be sure to check the Part-time employee box and verify the working hours are less than 40.</i> <p>Additional Resources added at the end of the document</p>

Trigger:

There is a need to process a Promotion for one of the reasons listed in the Business Process Procedure Overview section.

Business Process Procedure Overview:

Promotion - movement to a position assigned a higher salary grade or movement between positions from one career-banded class to another with a higher journey market rate or movement from one position to another within the same banded class with a higher competency level.

- **01 - Promotion** - is movement to a position assigned a higher salary grade or movement between positions from one career-banded class to another with a higher journey market rate or movement from one position to another within the same banded class with a higher competency level.
- **02 - Promotion Inc-After Eff Date** – an employee receives remainder of increase with a current effective date.
- **03 - Acting Promotion** - is a temporary movement to a position assigned a higher salary grade or temporary movement between positions from one career-banded class to another with a higher journey market rate or temporary movement from one position to another within the same banded class with a higher competency level. Promotion Inc-After Eff Date – employee receives remainder of increase with a current effective date.

NOTE: If the Promotion action is for a limited time period, create an infotype 0019 Monitoring of Tasks record via transaction code PA30 to create a reminder to process the Cancel Salary Adjustment at the end date of the Promotion/Acting Promotion.

Tips and Tricks:

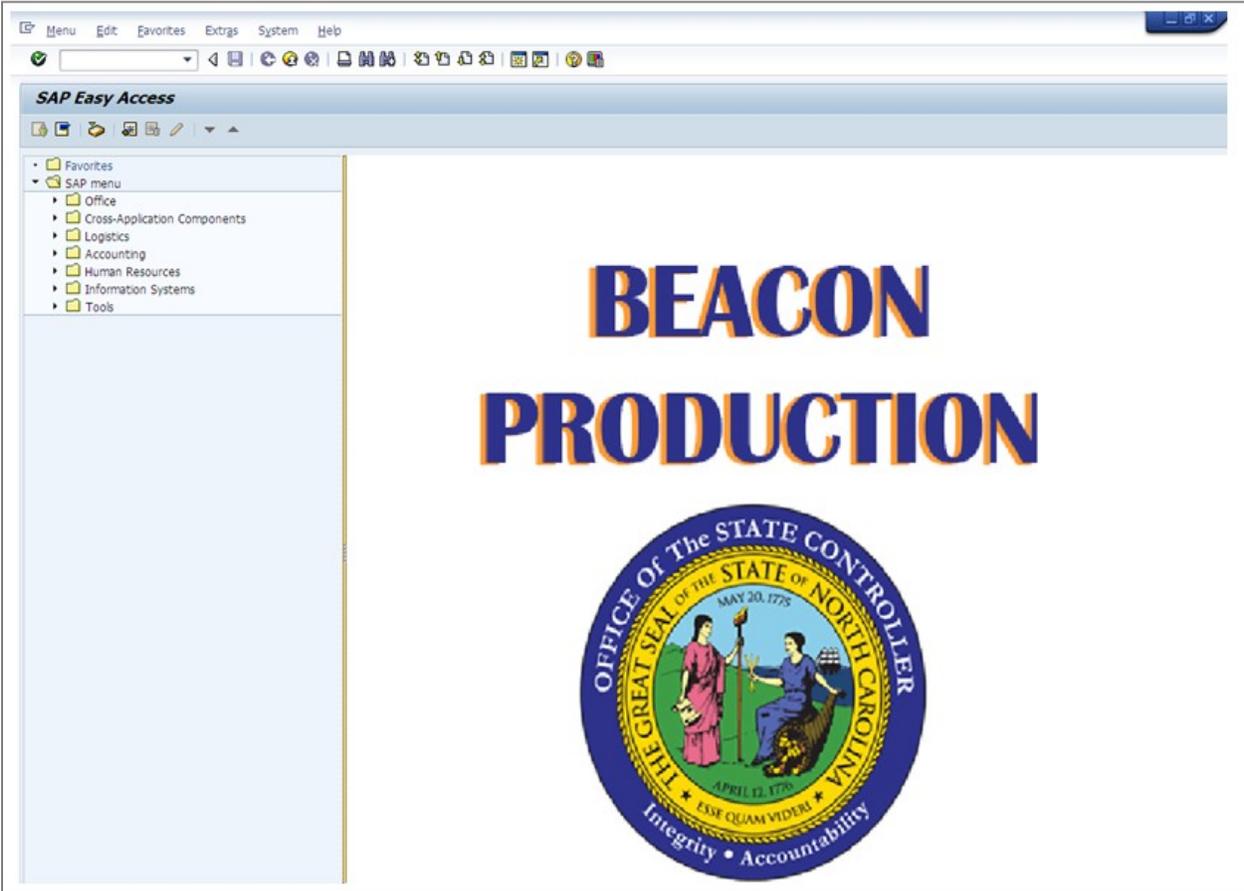
Prior to initiating any workflow, ensure the data being used is valid and appropriate.

See the **PA Tips and Tricks Job Aid** for a fuller listing of Best Practices and Tips & Tricks. The job aid is located on the Training Help website <http://www.osc.nc.gov/training/osctd/help/> in the following folder: *Personnel Administration > Job Aids*.

Access Transaction:

Via Menu Path:	Your menu path may contain this custom transaction code depending on your security roles.
Via Transaction Code:	ZPAA076; SWBP; PA40

PROCEDURE



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: ZPAA076

2. Click the **Enter**  button.



Information

You may want to enter this transaction code in your Favorites folder.

- Choose Favorites > Insert Favorites
- Type in ZPAA076
- Click Enter.

To see the transaction code displayed in front of the link in your favorites:

- Choose Edit > Settings
- Place a check next to Display Technical Name
- Click Enter

Employee Action Request






Existing PCR No.

Personnel No. Susan Castro

Last 4 digits (SSN) First Last

Effective on

Action Type Promotion (NC)

Reason Promotion

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. Example: 80000610
Effective on	The date the action will be effective on	Enter value in Effective on. Example: 08/08/2011
Action Type	An action is a grouping of activities to perform a specific task. The action will prompt you for the Infotypes required to complete the task.	Enter value in Action Type. Example: Z1
Reason	Reason for the action, such as Promotion	Enter value in Reason. Example: 01

4. Click the **Enter**  button.

Enter the Personnel Number of the individual to be Promoted. Click **Enter** to retrieve the name of the individual and verify you have the correct Personnel Number.

NOTE: You only enter the SSN and name for New Hires.

If you need to look up the personnel number, click your cursor in the field and click on the matchcode search button to the right of the field for search options.

The system defaults the current date, but you may change the date to a day in the past or in the future.

There are several available **Reasons** to choose. For specific information on each reason, view the business process overview section at the beginning of these instructions.

Click Enter and verify the information is correct before proceeding..



Employee Action Request			
Existing PCR No.	<input type="text"/>		
Personnel No.	80000610	Susan Castro	
Last 4 digits (SSN)	<input type="text"/>	First	<input type="text"/>
		Last	<input type="text"/>
Effective on	08/08/2011		
Action Type	Z1	Promotion (NC)	
Reason	01	Promotion	

5. Click the **Create (F5)**  button.

If the information is correct, click **Create** to begin the process.

Leave the **Existing PCR No.** field blank if you are creating a new PCR.

Several fields on this screen are mandatory. The system will not let you continue if you have not provided data for the mandatory fields. If you are unsure which fields are mandatory, click Enter, and the system will prompt you for information in the mandatory fields.

Employee Action Request

Initiate WF

PCR Number

Personnel Number Susan Castro Action: Promotion (NC)

Last 4 digits(SSN) Reason: Promotion

Effective on Chng St:

CURRENT		PROPOSED	
Pers.Area	<input type="text" value="4601"/> Cultural Resources	Pers.Area	<input type="text" value="4601"/> Cultural Resources
Subarea	<input type="text" value="NC01"/> 7day Norm	Subarea	<input type="text" value="NC01"/> 7day Norm
EE Group	<input type="text" value="A"/> SPA Employees	EE Group	<input type="text" value="A"/> SPA Employees
EE Subgroup	<input type="text" value="A1"/> FT N-FLSAOT Perm	EE Subgrp	<input type="text" value="A1"/> FT N-FLSAOT Perm
Org. Unit	<input type="text" value="20010310"/> CR CDS A&H MOH Design Sec	Org. Unit	<input type="text" value="20010137"/> CR CDS A&H HIS RES Resear
Job	<input type="text" value="30001528"/> Museum Specialist	Job	<input type="text" value="30001497"/> Research Historian
EE Position	<input type="text" value="65001875"/> Lighting And Interactive Design...	EE Position	<input type="text" value="60083310"/> Research Historian

Basic Pay

Pay Scale type	<input type="text" value="01"/> Graded	Pay Scale type	<input type="text" value="01"/> Graded
Pay Scale Area	<input type="text" value="01"/> Annual Salaries	Pay Scale Area	<input type="text" value="01"/> Annual Salaries
Pay Scale Group	<input type="text" value="GR66"/> Level <input type="text" value="GR"/>	Pay Scale Group	<input type="text" value="GR68"/> Level <input type="text" value="GR"/>
Annual Salary	<input type="text" value="31,959.00"/> Hrly Sal <input type="text" value="0.00"/>	Annual Salary	<input type="text" value="35,154.90"/> Hourly Salary <input type="text"/>
	<input type="text" value="Calc Step - 0"/>		<input type="text" value="10.00"/>
		Min	<input type="text" value="35,337.00"/>
		Max	<input type="text" value="56,330.00"/> Next Inc Date <input type="text"/>

Dates

Last day worked

6. Update the following fields:

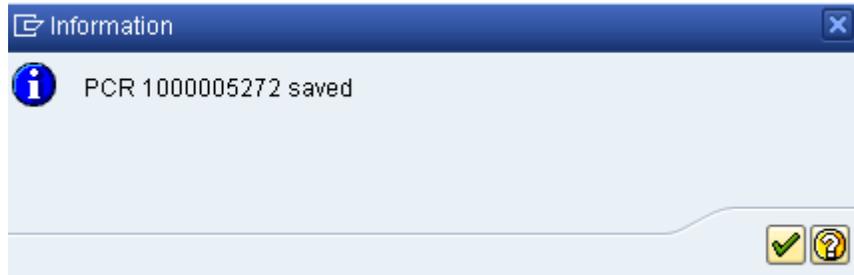
Field Name	Description	Values
EE Position	New position number assigned to the employee	Enter value in EE Position. Example: 60083310
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary. Example: 35,154.90

7. Click the **Enter**  button.

Enter the **Position** number that the individual is being promoted into, and their new salary or hourly rate. Click **Enter** to validate the data.

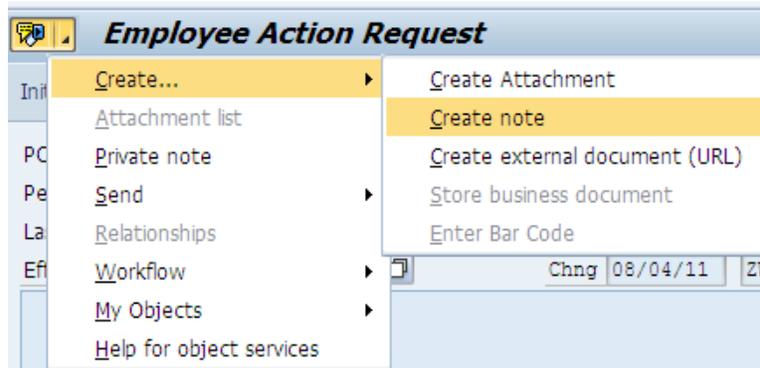
8. Click the **Save (Ctrl+S)**  button.

Click Save to save the data and receive a PCR number. The PCR has not been submitted to workflow yet.



9. Click the **Continue (Enter)**  button.

You may save this information as many times as you like, each time you will receive a confirmation of the save. You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.

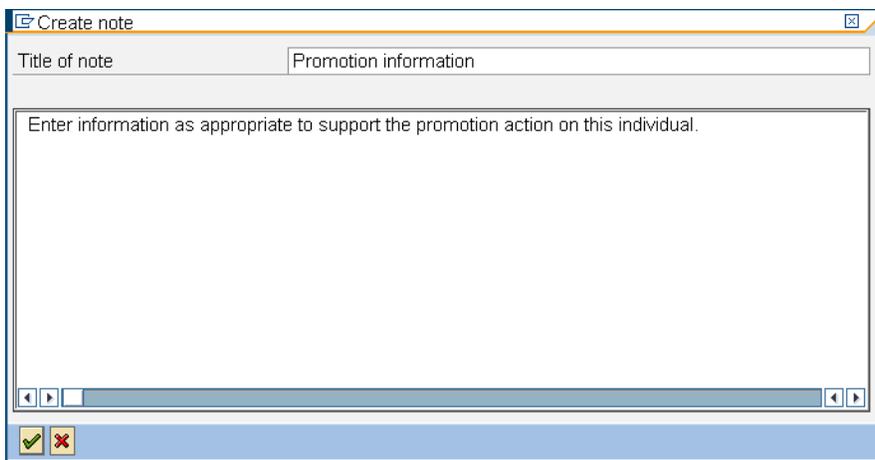


10. Click the **Services for Objects**  button.

11. Click **Create... >> Create note**.

You may enter any information that would be useful to the approvers downstream using the notes area, or attachment area. If you just need to type some information in, or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.

Follow the OSP or Agency-specific guidelines on notes and attachments to be added.



12. Update the following fields:

Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note. Example: Promotion information
Long text	An open text field	Enter value in Long text. Example: appropriate information

13. Click the **Copy (Enter)**  button.

Employee Action Request

Initiate WF

PCR Number: 1000005272
 Personnel Number: 80000610 Susan Castro Action: Z1 Promotion (NC)
 Last 4 digits(SSN): Reason: 01 Promotion
 Effective on: 08/08/2011 Chng: 08/08/11 ZWFINOMPA031 St: 0 Created

CURRENT		PROPOSED	
Pers.Area	4601 Cultural Resources	Pers.Area	4601 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	A1 FT N-FLSAOT Perm	EE Subgrp	A1 FT N-FLSAOT Perm
Org. Unit	20010310 CR CDS A&H MOH Design Sec	Org. Unit	20010137 CR CDS A&H HIS RES Resear
Job	30001528 Museum Specialist	Job	30001497 Research Historian
EE Position	65001875 Lighting And Interactive Design...	EE Position	60083310 Research Historian

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	GR66 Level GR	Pay Scale Group	GR68 Level GR
Annual Salary	31,959.00 Hrly Sal 0.00	Annual Salary	35,154.90 Hourly Salary
Calc Step - 0		Calc Step - 0	10.00
Min	35,337.00	Max	56,330.00
Next Inc Date			

Dates

Last day worked

- Click the **Enter**  button.
- Click the **Save (Ctrl+S)**  button.
- Click the **Initiate WF**  button.

Select the **Initiate Workflow** button to send the Promotion Action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).



17. Click the **Continue (Enter)**  button.

Employee Action Request

Existing PCR No.

Personnel No.

Last 4 digits (SSN) First Last

Effective on

Action Type Promotion (NC)

Reason Promotion

18. Click the **Back (F3)**  button.

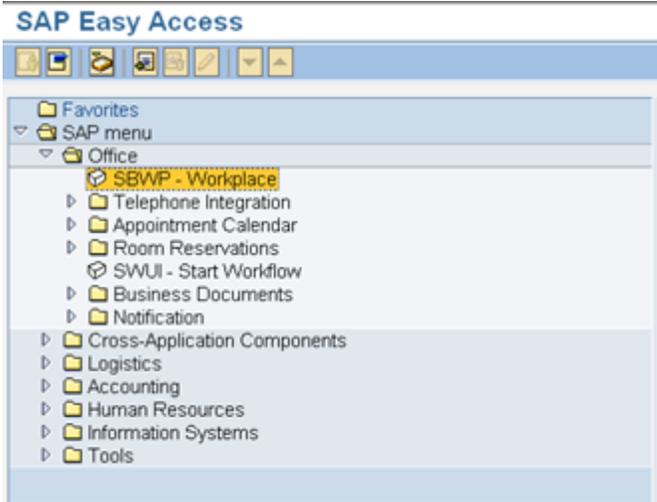
19. The Initiate Promotion Action is complete.

After Workflow Approvals have been received, process with the Complete Promotion Action process.

Instructions for Completing the Action

Access Transaction:

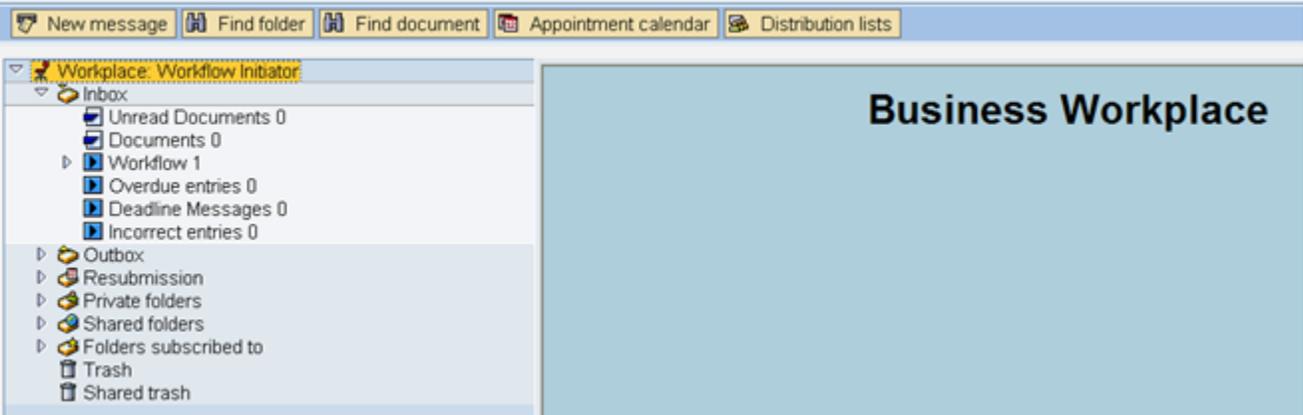
Via Menu Path:	SAP menu ==> Office ==> SBWP - Workplace
Via Transaction Code:	SBWP



20. Click the **SAP Business Workplace (Ctrl+F12)**  button.

These instructions assume you have already initiated the Promotion Personnel Change Request (PCR) in workflow, and you have an approved PCR ready to be processed as a Promotion in the system.

Business Workplace of Workflow Initiator



21. Select **Inbox >> Workflow**.

You can process using step 22 or step 23.

Business Workplace of Workflow Initiator

New message Find folder Find document Appointment calendar Distribution lists

Workplace: Workflow Initiator

Inbox

- Unread Documents 0
- Documents 0
- Workflow 1**
 - Grouped according to content
 - Grouped according to content type
 - Grouped according to sort key
 - Grouped according to task
- Overdue entries 0
- Deadline Messages 0
- Incorrect entries 0

Outbox

- Resubmission
- Private folders
- Shared folders
- Folders subscribed to
- Trash
- Shared trash

Workflow 1

Ex...	Title	Status	Creation Da...	Creation ...	P Att...	Co...	W...
4601	Create PA Action - Promotion (NC) for Susan Castro - PCR: 1000005272		08/08/2011	08:30:46	5		

Tips & tricks: Create Attachment...

4601 Create PA Action - Promotion (NC) for Susan Castro - PCR: 1000005272

Description
PCR Initiator.
Please complete all data for the new personnel action for Employee Susan Castro ~ Personnel #80000610 based on the attached request.
* Make sure to Save your changes before exiting from the screen, and do not press the 'Complete Work Item' button until

Objects and attachments

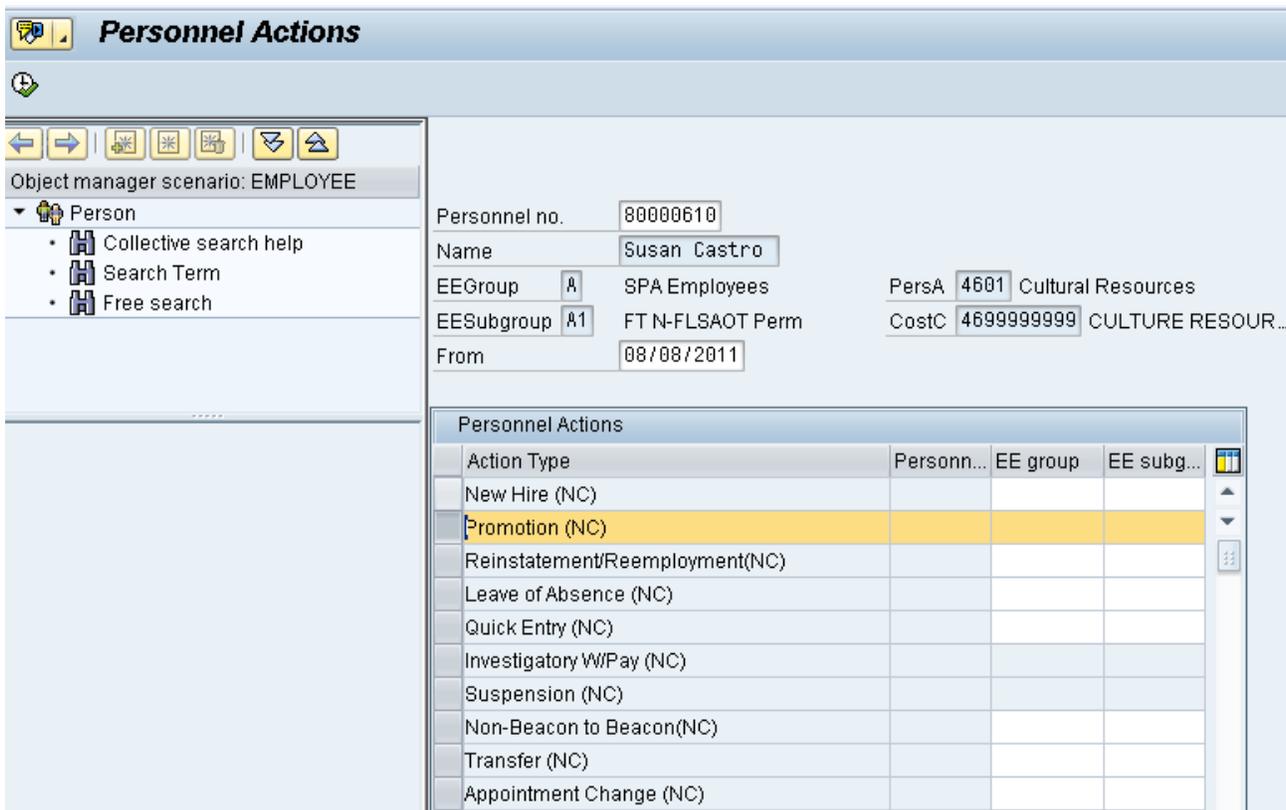
- PA PCR: Susan Castro PCR:1000005272
- PCR_List: Workflow Tracker

22. Select the **PCR** 4601 Create PA Action - Promotion (NC) for Susan Castro - PCR: 1000005272 row.

23. Double -click on row.

24. Click the **Execute (F8)**  button.

A list of your approved (or rejected) PCR's are listed on the right side of the screen. Select the PCR to be processed and click Execute (or double-click the PCR). You may view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. Once executing the PCR, the Promotion action will be launched.



25. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. Example: 08/08/2011

26. Highlight **Promotion (NC)** action type.

27. Click the **Execute (F8)**  button.

The effective date is the date the Promotion will go into effect.

Copy Actions (0000)

Pers.No. 80000610
Name Susan Castro
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup A1 FT N-FLSAOT Perm
Start 08/08/2011 to 12/31/9999

Personnel action
Action Type Z1 Promotion (NC)
Reason for Action 01 Promotion

Status
Customer-specific
Employment 3 Active
Special payment 1 Standard wage type

Organizational assignment
Position 60083310 Research Historian
Personnel area 4601 Cultural Resources
Employee group A SPA Employees
Employee subgroup A1 FT N-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action

28. Click the **Enter** button.

Record valid from 01/01/2008 to 12/31/9999 delimited at end

The system will provide a yellow warning message informing you the existing record will be delimited. Click Enter past this warning message.

Notice at the top of this screen the title includes the word “Copy”. This action takes the original action and makes a copy of it, delimiting the previous record and saving the new record. The word “Create” in the title indicates that this infotype is being created on this person's record for the first time.

Person and position have different employee groups/subgroups

When the employee subgroup is different from the position employee subgroup you will receive a warning message. Click **Enter** to continue.

Infotype Text



Enter or paste appropriate comments. |

29. Click **Edit, >> Maintain text.**

To add your comment based on agency or OSP Policy/Guidelines. Remember you can cut and paste from the PCR.

30. Click the **Enter**  button.

31. Click the **Save (Ctrl+S)**  button.

Create Organizational Assignment (0001)

Org Structure

Personnel No 80000610 Name Susan Castro

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 08/08/2011 to 12/31/9999

Enterprise structure

CoCode NC01 STATE OF NC

Pers.area 4601 Cultural Resources Subarea NC01 7day Norm

Cost Ctr 4699999999 CULTURE RESOU... Bus. Area 4600 Cultural Resources

Fund 4699999999 CULTURE- SUSP...

Func. Area 600000000000000001 General Government

Personnel structure

EE group A SPA Employees Payr.area 01 NC Monthly

EE subgroup A1 FT N-FLSAOT Perm Contract

Organizational plan

Percentage 100.00 Assignment

Position 60083310 20100002039
Research Historian

Job key 30001497 Resrch His
Research Historian

Org. Unit 20010137 48020102037
CR CDS A&H HIS RE...

Org.key 46014699999999

32. Click the **Enter**  button.

Enter the Contract if required. The Contract key identifies eligibility for Medicare, less than 5 yrs for STD, and the Rehire of Retiree statuses.

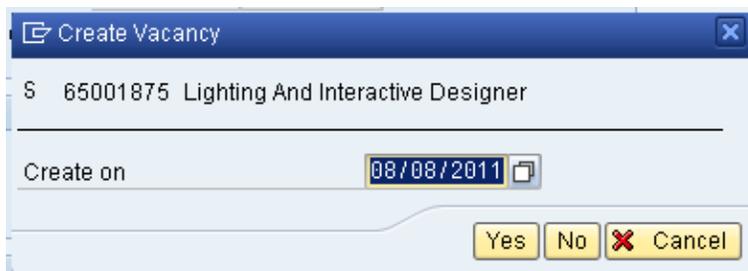


If the contract field is completed on the previous IT0001, it will copy to the new IT0001.

CRITICAL!

33. Click the **Save (Ctrl+S)**  button.

The system will display a yellow warning message informing you the existing record will be delimited. Click **Save** to move pass this warning message.



34. Click the **Yes** button.

Click **Yes** to create a vacancy in the position from which the individual is leaving.



35. Click the **Yes** button.

Click **Yes** to delimit (put an end date to) the vacancy of the position into which the individual is being promoted. If you click **No**, the position will show up as unoccupied on vacancy reports.

 Information	Use PO13D to review infotype 1001, B008 holder relationship was delimited or created. IT1007 Vacancy – controls if shows up on the BI Report correctly.
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Create Planned Working Time (0007)

Work schedule

Personnel No: 80000610 Name: Susan Castro
EEGroup: A SPA Employees PersA: 4601 Cultural Resources
EESubgroup: A1 FT N-FLSAOT Perm Statu: Active
Start: 08/08/2011 To: 12/31/9999

Work schedule rule

Work schedule rule: 001N08GN MTWHF-8,SaS-O
Time Mgmt status: 1 1 - Positive Time Recording
Working week: 07 Wk - Sun (mdnt) - Sat
 Part-time employee

Working time

Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00
Weekly workdays	

36. Click the **Enter**  button.

Adjust their work schedule as appropriate and save the data.

The Work Schedule Rule and Time Mgmt status defaults from the employee's enterprise structure. It is critical that you review for correctness (including the working week) and change the work schedule as appropriate for the employee if it is different from the one that defaults.

If the individual is part-time, be sure to check the Part-time employee box and verify the working hours are less than 40.

The defaulted work schedule is based on information provided by the various agencies and OSC HR/Payroll system team members.

	Subject employees must be positive time. Employment percent should always be 100%.
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CRITICAL!

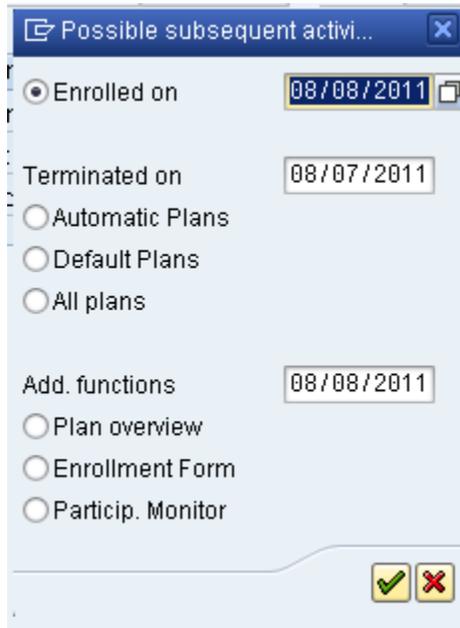
37. Click the **Save (Ctrl+S)**  button.

Notice that when you change the details on the working time infotype, the system reminds you to also manage IT0008, Basic Pay.

 Attention: Please check Basic Pay infotype (0008)

38. Click the **Enter**  button.

39. Click the **Save (Ctrl+S)**  button.



Subsequent activities should only be completed if the employee is being promoted to a position in a different retirement system than his or her current position (for example – going from TSERS to LEORS).

40. Click the **Cancel (F12)**  button.

If you do not need to make changes to the benefits of the individual, click **Cancel** to bypass this infotype.

Create Basic Pay (0008)

Salary amount Payments and deductions

Personnel No: 80000610 Name: Susan Castro

EEGroup: A SPA Employees PersA: 4601 Cultural Resources

EESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: 08/08/2011 to: 12/31/9999

Subtype: 0 Basic contract

Salary

Reason: Z1 Cap.util.M: 100.00

PS type: 01 Graded WkHrs/period: 173.33 Monthly

PS Area: 01 Annual Salaries Next inc.:

PS group: GR68 Level: GR Ann.salary: 35,154.90 USD

Wa...	Wage Type Long Text	O..	Amount	Curr...	I...	A..	Number/Unit	Unit
1000	Regular Salary		2,929.58	USD		<input checked="" type="checkbox"/>		

IV 08/08/2011 - 12/31/9999 0.00 USD

41. Update the following field:

Field Name	Description	Values
Reason	Reason for the action such as Promotion	Enter value in Reason. Example: Z1

42. Click the **Enter**  button.

The pay scale values (pay scale type, pay scale area, pay scale group and level) have been designed to default based on the rules assigned to the employee's position. If the pay scale values do not default, please contact BEST Shared Services or your BEST HR Specialist.

Enter the Reason Promotion (Z1), click Enter to validate the data. Notice the Annual Salary field has retrieved the amount submitted via workflow (or the hourly field is appropriated).

You will manually enter the hourly rate in the amount field; then press Enter and the annual salary automatically calculates.

43. Click the **Save (Ctrl+S)**  button.

Personnel Actions

Object manager scenario: EMPLOYEE

Personnel no. 80000610
Name Susan Castro
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOUR...
From 08/08/2011

Action Type	Personn...	EE group	EE subg...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			

44. Click the **Back (F3)**  button.

This Work Item Has To Be Completed Explicitly...

Info Log Attachments Agents

4601 Create PA Action - Promotion (NC) for Susan Castro - PCR: 1000005272

Description
PCR Initiator,
Please complete all data for the new personnel action for Employee Susan Castro ~ Personnel #80000610 based on the attached request.
* Make sure to Save your changes before exiting from the screen, and do not press the 'Complete Work Item' button until the necessary changes have been Completed.
** If you need to Cancel the entire PCR, click once on the work item to highlight it. press the 'Other functions...' button

Objects and attachments

- PA PCR: Susan Castro
PCR:1000005272
- PCR_List: Workflow Tracker

Complete Work Item Cancel

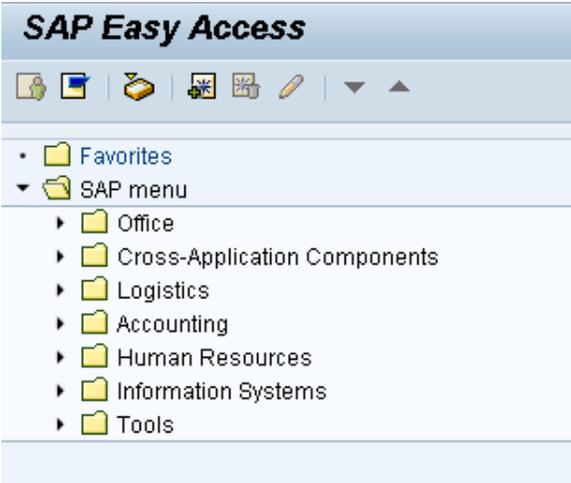
45. Click the **Complete Item**  button.

Only once all of the infotype screens within the action have been processed and the system has returned you to the main screen will this Complete button be visible. Now you may complete the PCR in workflow.



46. Click the **Back (F3)**  button.

You may remain in this SAP Business Workplace and process additional PCR's, or click the Back to return to the main SAP screen.



47. The Promotion Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

ADDITIONAL RESOURCES

OSC Training HELP website: <http://www.osc.nc.gov/training/osctd/help/>

Student Guides	<i>PA310 – Create & Maintain Employee Data</i> <ul style="list-style-type: none">• Student Guides folder
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