Exercise Guide for

PA310

Create and Maintain Employee Data

Disclaimer: The position action scenarios and exercises included in this course have been created solely for the purposes of training.

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Exercise 3.1 - New Hire

ZPAA076

Scenario

The Cultural Resources Library is undergoing a digitization process and will hire a new Digitization Clerk into its organizational unit (20010287). The new employee will begin working today at a salary that is equivalent to the minimum salary range. The new employee will be issued a badge and two keys. The employee's military status is Reserve.

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Watch as Instructor demonstrates the Agency and Funding approval process

III. Complete Approved PCR from the Initiator's Inbox

It is important to complete all of the exercises in their entirety because some subsequent exercises depend upon the data that was entered in previous exercises.

The online Business Process Procedure (BPP) is the step-by-step process. The Exercise Guide is not intended to be a step-by-step guide but merely contains the data to use. There are steps included in the first couple of exercises in the Exercise Guide; after that, you are instructed to use what you have learned up to that point to perform the subsequent exercises.

Part I – Initiate Workflow (WF) as Initiator

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. Log onto SAP using the Initiator user ID and password.
2. Assume the following: you have already run the Cross Verification Report and were not able to locate the employee in the system. You used PPOSE and verified that the position is vacant. You checked PMIS and did not find a record.
3. On the Easy Access screen, type **ZPAA076** in the Command field.
4. Click **Enter** . The Employee Action Request screen is displayed.

5. Enter the following data:

Field	Value
Last 4 digits (SSN)	Any of your choosing (make up a social security number for training purposes). Important! Write down the numbers you used because you will need them again: ____________________________ Enter the last 4 digits as applicable (if you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers until it is accepted).
Employee Name	Any of your choosing – Be sure you write down the name you use because you will need this person in subsequent exercises. ____________________________
Effective on	Today's date (in your work environment, follow State policy if the employee reports to work one day after the beginning of a payroll period that falls on a weekend or holiday).
Action Type	New Hire
Reason	New Hire

6. Click **Enter** .

7. Click **Create** . The second screen of the Employee Action Request screen is displayed.

8. Enter the following data:

   ***Refer to "peanut butter and jelly" on board.

Field	Value
EE Position	Use the Digitization Clerk position number in the Data Set that was assigned to your student number. ____________________________ Press Enter. Observe that the Employee Group and Employee Subgroup fields are now populated.

Field	Value
EE Group/Subgroup	Change to the appropriate subgroup to indicate that the employee is full time, subject to overtime, and is a **probationary** employee (use the matchcode and then double-click the correct selection). SPA Employees FT S-FLSAOT Prob. **NOTE:** When the Position number is entered, the Employee Subgroup defaults to FT S-FLSAOT Perm. Because this is a New Hire, the employee should be in probationary (or trainee) status.
Annual Salary	Select the minimum of the salary range

NOTE: Observe the field that will not be used now, but would be used in appropriate Actions: Last Date Worked.

9. Click **Enter** .
10. Click **Save** . The Information pop-up is displayed with the assigned PCR number.
11. Write the **PCR number** on your new hire paperwork (in class, use your Exercise Guide).
12. Click to close the pop-up.
13. Click **Services for Object** .

    NOTE: This button is not available until you have saved the Employee Action Request. 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.
14. Select **Create > Create Note**.
15. Enter a **note title**.
16. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date.

    NOTE: The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action. However, you can copy and paste from WF into the Action when you are processing the infotypes.
17. Click the **green check** to close the notes. If applicable, close the notes icon menu.

18. Click Initiate WF. The Information pop-up is displayed indicating that the PCR has been submitted.

19. Click the green check to close the Information pop-up. You are returned to the Employee Action Request (first screen).

Part II – Watch as the Instructor demonstrates the two approval levels (Agency and Funding)

Note to Instructor. Access thePA310 Instructor Supplement to this guide for additional steps..

Part III – Complete Approved PCR from Initiator's Inbox

NOTE: If you are on the Employee Action Request screen, use the Back button to return to the Easy Access Screen.

20. From the Easy Access screen, click **SAP Business Workplace**

21. Click the **node** beside Inbox Inbox to expand it.

22. Before you process the PCR, make a copy of the note in order to paste it into the Actions infotype:
    - Select (do not double-click) the Workflow to select it.
    - At the bottom of the screen, click the "**header**" (not tracker) link: PA PCR xxxxx ###### (where X and # represent employee's name and PCR number).
    - At the Employee Action Request screen, click the **Services for Object** button to review the notes or attachments.
    - Select **Attachment List**.
    - Highlight the **line item** for the note.
    - Double-click or use the eyeglasses.
    - Highlight the entire note, including the title.
    - Right-click and select **Copy**. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**
    - Click **X** to close the Display note pop-up.
    - Click **X** to close the Services for Objects pop-up. It is a best practice to make sure the PCR is closed before you process the approved PCR Actions because an open PCR uses a lot of memory.
    - Click the **Back** button.

23. With the PCR still selected, click the **Execute** (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is the Hiring Action screen).

24. On the Hiring Action screen, enter the following data:

Field	Value
SSN	On the Hiring Action screen, you must enter the complete social security number (on WF, you only entered the last 4). For training, use the set of numbers from the previous step. **CAUTION! Be sure the last 4 are the same as the ones you entered on WF.** If you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers (except the last 4) until it is accepted.
DOB	11/15/1980
Gender	Use a gender that matches the name you chose.

25. Click **Enter** and **Execute** . The Personnel Actions screen is displayed with an assigned personnel number.

26. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Today's date (this must always match the date you entered on WF).
Action Type	Select New Hire

27. Click **Enter** .

28. Click **Execute** .

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

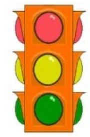
29. Complete the following fields:

Infotype/Field	Value
Create Actions (IT0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF
EE Group/Subgroup	Observe the field defaulted from WF If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Enter and Save. A warning message displays indicating that the employee and position have different groups/subgroups. Enter to bypass the warning.
Enter note copied from WF	From the menu bar: • Select Edit • Maintain text. • Press Enter if a warning message displays indicating that person and position have different group/subgroup • Enter • Use Ctrl+V (or use the Insert button) to paste the note from the PCR. • Click Enter. • Click Save. • Click Save as needed to bypass warning messages again.
Create Personal Data (IT0002)	
Title	Select from drop-down list.
Marital status	Single
Gender	A gender that matches the name you chose
Dependents	Leave blank (this field is not used during the Action) Enter and Save

Infotype/Field	Value
Create Organizational Assignment (IT0001)	Enter and Save
Delimit vacancy	Yes
Create Date Specifications (IT0041)	Review for accuracy Enter and Save
Create Addresses (IT0006)	
Permanent address	4 Paws Lane Raleigh Wake County NC 27604 INSTR: Mention limited number of characters **NOTE**: Enter address information on Address line 1. Only use Address line 2 if all of the information doesn't fit on line 1.
Telephone	Choose a type from the matchcode list. 919-244-8754 Enter and Save.
Tax screens (IT0207, IT0208, IT0209)	These all default from the previous information you entered. Review for accuracy, Enter and Save.
Create Withholding Info W4/W5 US (Required) (IT0210)	**NOTE**: The initial set-up is done by HR. Changes can be made by the employee via ESS. If updated after the first day of the month, the changes take effect the following pay period. If the employee is exempt from taxes, you will select the exempt option and choose "reportable" from the list. If the employee wants an additional amount withheld, enter the dollar amount in the "add. Withholding" field.
Federal Filing Status	Single (01)
Allowances	1 Enter and Save
Create Withholding Info W4/W5 US – State Filing Status (IT0211)	See the note above on Federal W4 regarding the other information about this infotype. Single (01)

Infotype/Field	Value
State Allowances	1 Enter and Save
Create Addresses (IT0006)	**NOTE**: Enter address information on Address line 1. Only use Address line 2 if all of the information doesn't fit on line 1.
Emergency	Havya Bach 65 Red Cross Rd Raleigh NC 27604 Telephone: 919-898-4545 (be sure to select a type) Enter and Save.
Mailing address/phone	PO Box 5104 Raleigh NC 27604 Enter and Save
Create Monitoring of Tasks (IT0019)	You are using the Monitoring of Tasks infotype to remind you of a task that you need to follow up on concerning the employee (like a tickler file).
Task type	For this exercise, use End of Probation. In your work environment, you would make the selection based upon the task for which you want to be reminded.
Date of task	Enter 9 months from date of hire. In your work environment, you would enter a date applicable to your Agency process. Press Enter.
Reminder date	This field has been designed to automatically populate. You can change the date if a different date better meets your needs. Add comments. Enter
Processing Indicator	Defaults to "New Task." Do not change. Save

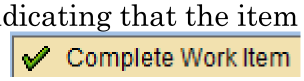
Create I-9 Status (IT0094)	
Residence status	Click the drop-down and select Citizen. Be aware that if an employee is not a citizen, you would make a different choice in the drop-down, and a second infotype (0048 Residence Status) would display. See the Student Guide for details concerning how to process infotype 0048. **NOTE**: The OSC HR/Payroll system entry for non-Citizen employees does not replace Windstar—you must still enter non-Citizen employees into the Windstar system, the official system of record for non-citizen employees.
ID type	Click the drop-down and select U. S. Passport **NOTE**: There are other options in the Employment verification section like birth certificate, social security number, etc.
Issuing Authority	New Orleans LA, USA
ID #	874032
Dates	Issues 10/1/2006, expires 10/1/2016 Enter and Save
Create Communication (IT0105)	919-259-4574. This infotype is for the entry of the employee's office telephone. Enter and Save You may receive a warning that the ID number is already in use. Enter to bypass the warning.
Create Planned Working Time (IT0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure. **It is especially important to check the part-time box when applicable.** For this exercise, accept the default. Observe that when you press Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field. Enter and Save

Create Basic Pay (IT0008) You should use **Edit > Maintain** text to write a note when applicable	**Reason**: New Hire --- STOPLIGHT!!!  **NOTE**: Observe that the salary defaulted from WF. Observe also that the value is USD which has automatically populated. If the employee was assigned to a DOT position, the HR/Payroll system would automatically change the field to USDN. All permanent DOT positions require 5 decimals on the Basic Pay infotype (0008). If the DOT employee is a temporary employee, the field will remain as USD because 5 decimals are not required for DOT temporary employees. Enter and Save
Possible subsequent activities	• Click the green check to get to the enrollment screen. • Double-click the "automatic offer" option in order for TSERS to display. • Click the Enroll button. • Click Enroll again. • Click Continue. • Click the back button (top of screen). • Click the red X to return to the data entry screen.
Create Bank Details (Required) (IT0009) You should always use **Edit > Maintain text** to write an applicable note when needed	The completion of the Bank Details infotype (0009) must be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, set up a paper check. It is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing. You must obtain high level approval before you can change the field from "direct deposit" to "check".
Bank routing (key)	011100106 (Wachovia)
Bank account number	5487542
Bank Control key	01 (01 is checking; 02 is savings) Enter and Save

Create Additional Personal Data (IT0077)	
Ethnic Origin	Use your own
Military status	Reserve
Veteran status	Non-veteran **NOTE:** If "Recently Separated Veteran" is chosen, a new date box displays, and will need to enter the employee's discharge date.
Disability status	None/prefer not to report Click Enter and Save.
Subtypes for "Quota Corrections" pop-up	Select Military Leave (Training)
Create Quota Corrections (IT2013)	Quota number: 120 hours Click the drop-down box in the Transfer field and select the **Only transfer quota correction immediately** option. Enter and Save.
Subtype for Infotype "Education"	Select 06 for Bachelor (BAC) Degree Click the green check.
Create Education (IT0022)	
Start and to	9/01/1998 - 5/30/2002
College attended	NC State. **NOTE:** Be sure you are consistent in the way you enter the college name. For example, you would not enter NC State on one employee and enter North Carolina State on another employee. Consistency assists when you are running reports.
Verified	Use the drop-down menu and select the option that indicates that verification is pending. Enter and Save
Monitoring of Tasks (IT0019)	This time, the Monitoring of Tasks (0019) gives you an opportunity to follow up on the verification of the education. Monitoring of Tasks displays on your manager's self service. To view a list of your tasks, you must run the Date Monitoring Report (transaction S_PH0_48000450).

Task type	Select "Credential Verification."
Date of task	Enter 30 days from today. In your work environment, you would enter a date applicable to your Agency process. Press Enter.
Processing Indicator	Defaults to "New Task." Do not change.
Reminder date	This field has been designed to automatically populate. You can change the date if a different date better meets your needs. If education is verified prior to the reminder date, the task is not automatically deleted; it will still display on the report and on MSS. You can delimit the infotype on the day you verify the education which will keep it from displaying on the report. Enter and Save
Subtypes for infotype Certification and Licensing	Click X to remove pop-up window. This infotype is used when the position requires a specific certificate or license.
Create Objects on loan (IT0040)	State ID #45. 1/pieces **NOTE:** On the initial hire, you are to only enter one item on loan. If the employee receives more than one item--like in this case key # B05 and key #A12-- you will use PA30 to add the additional items; however you will perform that part of the exercise in this class). Enter and Save

30. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action.

31. The pop-up is displayed indicating that the item must be explicitly completed. Click **Complete Work Item** 

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NOTE: It is critical that you complete this last step. Also be aware that if you cancelled the PCR without finishing the Action (which put the PCR back into your Inbox), when you click the Complete Work Item button, you will receive another screen where you have to indicate again that you have finished the Personnel Action.

32. Click **PA Action Completed** at the Decision Step in Workflow screen (middle option).
33. Click the **Back** button to return to the Easy Access screen.
34. On the Easy Access screen, type **PA30** in the Command field and press Enter.
35. Type **0040** in the Infotype field and press Enter.
36. Click **Create** .
37. Select the code for **Office Keys** in the Object on loan field.
38. Enter **2 / pieces** in the Number/unit field.
39. **Enter** and **save**. The system again displays the PA30 screen.
40. Click the **Overview** button to view a list of the Objects on Loan you created.

Manually Adding Performance Infotype

If you are processing a new hire between mid-April and June 30 every year, you will have to manually add the Performance Rating Infotype on all new hires (see Performance Rating IT0024 BPP for details). You will not perform this part of the exercise in class.

Questions

Answer the following questions.

Question 1

What are the transactions that should always be done prior to initiating a New Hire Workflow?

Question 2

What system did SAP communicate with in order to receive the Personnel No.?

Question 3

Which transaction code and infotype must you use to document any additional State-owned property the employee is issued?

This exercise is complete.

Exercise 3.2 - Non-Beacon to Beacon – Lateral (Rejected PCR)

ZPAA076

Scenario

Anita _________________, an Office Assistant IV at UNC-CH, has accepted an Office Assistant IV position at the Cultural Resources Archives and History office. Her current salary is the minimum of the salary range (the same salary she was receiving in her previous position) and she is a permanent, subject to FLSA OT employee. She had 110 months of creditable service at UNC-CH. Anita was given a State ID and two office keys.

Instructions

There are three parts to this Exercise. You are responsible for I and III.

I. Initiate Workflow (WF)

II. Wait as Instructor processes the Agency and Funding approvals

III. Complete Approved PCR from the Initiator's Inbox

Part I – Initiate Workflow (WF) as Initiator

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. Assume you have already run the *Verify Employment* Report and did not find the employee in the system; assume you also used PPOSE and verified that the position is vacant.
2. On the Easy Access screen, type **ZPAA076** in the Command field.
3. Click . The Employee Action Request screen is displayed.

4. Enter the following data:

Field	Value
Last 4 digits (SSN)	Use any 4 digits of your choosing (if you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers until it is accepted). Anita ____________ (make up last name) **Important! Write down the nine (9) digits you used because you will need them again:** ______________________________ You only have to enter the last 4 SSN when you are processing a New Hire or Non-Beacon to Beacon. For all other Actions, you do not enter the last 4 SSN.
Employee Name	Anita _______________________. You only enter your initials in class, not in your work environment.
Effective on	Today's date
Action Type	Non-Beacon to Beacon
Reason	Transfer Lateral

5. Click **Enter** .

6. Click **Create** . The second screen of the Employee Action Request screen is displayed.

7. Enter the following data:

Field	Value
EE Position	Use the Data Sheet Office Assistant IV position number assigned to your student number. Press Enter.
EE Group/Subgroup	Observe that the Employee Group and Employee Subgroup fields are now populated. When the Position number is entered, the HR/Payroll system defaults the Employee Subgroup to **FT Perm** (S or N-FLSAOT depending on the position). You will change as applicable for the Action you are processing. For this exercise, leave the default.
Annual Salary	$1000 above Minimum range

NOTE: Observe that the Last Date Worked field will not be used now, but will be used in later Actions.

8. Click **Enter** .
9. Click **Save** . The Information pop-up is displayed with the assigned PCR number.
10. Write the **PCR number** on the employee paperwork (in class, use the Data Sheet).
11. Click to close the pop-up.
12. Click **Services for Object** .

    NOTE: This button is not available until you save the PCR. 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. Private notes can only be seen by the Initiator.
13. Select **Create > Create Note**.
14. Enter a **note title**.
15. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date.

    NOTE: The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action. Private notes can only be seen by the person who created them.
16. Click to close the notes. If applicable, close the notes icon menu.
17. Click **Enter** .
18. Click **Save** .
19. Click Initiate WF. The Information pop-up is displayed indicating that the PCR has been submitted.
20. Click to close the Information pop-up. You are returned to the Employee Action Request (first screen).

Part II – Wait for Instructor or Navigator to Approve the PCR

There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

Part III – Resubmit PCR

Your PCR has been rejected by an Approver. Rejection notes have been included in the PCR that has been returned to your Workflow Inbox.

21. From the Easy Access screen, click **SAP Business Workplace** .
22. Click the **node** beside Inbox Inbox to expand it.
23. Double-click **Workflow**. The PCRs that have been approved (or rejected) are listed in the right column.
24. Double-click to select the **PCR** you want to process. The Decision Step in Workflow screen is displayed.
25. Click the Change and Resubmit button. The Employee Action Request screen is displayed.
26. Change the Annual Salary per PCR rejection note from Approver.
27. Enter.
28. Save.
29. Initiate Workflow.

Part IV – Wait for Instructor or Navigator to Approve the PCR

Your instructor and/or navigator will perform this part.

Part V – Process Approved PCR from Initiator Inbox

30. From the Easy Access screen, click **SAP Business Workplace** .
31. Click the **node** beside Inbox Inbox to expand it.
32. Double-click **Workflow**. The PCRs that have been approved (or rejected) are listed in the right column.
33. Select the **PCR** you want to process.
34. Click **Execute** (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is the Hiring Action screen).

CAUTION! SAP Actions are designed to be completed from beginning to end; it is not appropriate for one person in the Agency to enter some of the infotypes and someone else to go in and use PA30 to complete the infotypes individually. The Action has dynamic processes that take place behind the scenes which affect time and payroll. Completing the Action in a piece-meal manner does not allow these dynamic processes to take place which causes errors in the employee's time and payroll processes at a later date.

35. On the Hiring Action screen, enter the following data:

Field	Value
SSN	On the Hiring Action screen you must enter the complete social security number (on WF, you only entered the last 4). For training, use any set of numbers of your choosing. Caution! Be sure the last 4 are the same as the ones you entered on WF. If you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers (except the last 4) until it is accepted.
DOB	04/01/1975
Gender	Female

36. Click **Enter** and Execute . The Personnel Actions screen is displayed with an assigned personnel number.

37. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Today's date (the date on this screen should always be the same date as you entered on the WF).
Action Type	Non-Beacon to Beacon

38. Click **Enter** .

39. Click **Execute** .

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

40. Complete the following fields:

Infotype/Field	Value
Actions (IT0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF

Infotype/Field	Value
EE Group/Subgroup	Observe the field defaulted from WF If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Enter and Save
Date Specifications (IT0041)	Review for accuracy Enter and Save
Organizational Assignment (IT0001)	Enter and Save
Delimit vacancy	Yes
Personal Data (IT0002)	
Title	Select from drop-down list
Marital status	Single
Gender	Female
Dependents	Leave blank (this field is not used during the Action) Enter and Save
Addresses (IT0006)	
Permanent address	67 Bill Ding Road Raleigh NC 27604 Wake County
Telephone	Select a type of telephone. 919-867-5309 Enter and Save
Tax screens (IT0207, IT0208, IT0209)	These all default from the previous information you entered. Review for accuracy, Enter and Save.
Withholding Info W4/W5 US- Federal Filing Status (IT0210)	Single (01)
Allowances	1 Enter and Save

Infotype/Field	Value
Withholding Info W4/W5 US – State Filing Status (IT0211)	Single (01)
State Allowances	1 Enter and Save
Addresses (IT0006)	
Emergency	Iona Clinic 1212 Mettie Cal Dr Raleigh NC 27604 Telephone: 919-818-4545 (don't forget to select a type) Enter and Save
Mailing address/phone	Use Next Record to skip
Monitoring of Tasks (IT0019)	The Monitoring of Tasks infotype is used to remind you of a task on which you need to follow up concerning the employee (such as a tickler file). For this Exercise, click Next Record to skip.
I-9 Status (IT0094)	
Residence status	Click the drop-down and select Citizen. Be aware that if an employee is not a citizen, you would make a different choice in the drop-down, and a second infotype (0048 Residence Status) would display. See the Student Guide for details concerning how to process infotype 0048. **NOTE**: The system entry for non-Citizen employees does not replace Windstar—you must still enter non-Citizen employees into the Windstar system which is the official system of record for non-citizen employees.
ID type	Click the drop-down and select U. S. Drivers License w/photo. Observe there are additional options in the Employment Verification section of the screen.
Issuing Authority	North Carolina
ID #	NC7856524

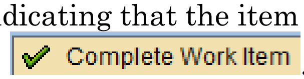
Infotype/Field	Value
Dates	Issued 02/18/2007 Expires 02/18/2015
Issuing Authority	US Government Enter and Save.
Communication (0105)	919-259-4574. (use hyphens) This infotype is for the entry of the employee's office telephone. Enter and Save You may receive a warning that the ID number is already in use. Enter to bypass the warning.
Planned Working Time (IT0007)	It is critical that you review this infotype. The planned working time defaults based on the employee's organizational structure. **It is especially important to check the part-time box** when applicable. For this exercise, accept the default. Observe that when you press Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field. Enter and Save
Basic Pay (IT0008) 	**Reason**: Non-Beacon to Beacon It is **important** that you always enter the Reason field and that you use the same reason as the Action type. Observe that the salary defaulted from WF. Observe also that the value is **USD** which has automatically populated. If the employee was assigned to a DOT position, the HR/Payroll system would automatically change the field to USDN. All permanent DOT positions require 5 decimals on the Basic Pay infotype (0008). If the DOT employee is a temporary employee, the field will remain as USD because 5 decimals are not required for DOT temporary employees. Enter and Save.

Infotype/Field	Value
Possible subsequent activities	• Click the green check to get to the enrollment screen • Double-click the "automatic offer" option in order for TSERS to display • Click the Enroll button • Click Enroll again • Click Continue • Click the Back button (top of screen) • Click the red X to return to the data entry screen
Create Bank Details (IT0009)	The completion of the Bank Details infotype (IT0009) <u>must</u> be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, set up a paper check. It is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing. In order to change the field to "check" you must fill out the proper forms and receive higher level approval.
Bank routing (key)	021312971 (Capital Bank and Trust)
Bank account number	234987656
Bank Control key	01 (01 is checking; 02 is savings) Enter and Save
Additional Personal Data (IT0077)	
Ethnic Origin	Use your own
Military status	Leave blank
Veteran status	Non-veteran
Disability status	None/prefer not to report Enter and Save
Subtype for Infotype "Education"	Select High School Click the green check to close.

Infotype/Field	Value
Education (IT0022)	
Start and to	09/01/1992 - 05/30/1995 **NOTE**: You are entering the dates the employee indicated they attended the institution.
Institution location	________ High School (use your High School)
Verified	High School 02. **NOTE**: you would only choose 02 if your Agency does not require verification of high school education; otherwise you would use the pending code. Enter and Save
Monitoring of Tasks (IT0019)	Use applicable icon to skip infotype. **NOTE**: You would skip this infotype if your Agency does not require verification of high school education; otherwise you would enter the applicable date on this infotype indicating when you expected to have the verification completed.
Subtypes for infotype Certification and Licensing	Click X to close pop-up window. This infotype is used when the position requires a specific certificate or license.
Objects on loan (IT0040)	State ID Number/unit: 1/pieces #99919 **NOTE:** On the Action, you are to only enter one item on loan. If the employee receives more than one item--like in this case key # B05 and key #A12-- you will use PA30 to add the additional items after completing this section. Enter and Save

41. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).

42. The pop-up is displayed indicating that the item must be explicitly completed.

    Click **Complete Work Item** 

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    NOTE: It is critical that you complete this last step. You may receive a Decision in Work Item screen. If you do, select PA Action Completed.

Using PA30 to add additional Objects on Loan

Access PA30 to add the office keys to IT0040. Refer to Exercise 3:2 beginning at step 34 if you need help.

Using PA30 to add IT0552

Creditable service earned PRIOR to BEACON must be entered via PA30 on IT0552; however you will not perform that part of the exercise in this class.

Questions

Answer the following questions.

Question 1

When is the Non-Beacon to Beacon Action appropriate?

Question 2

When is the Reinstatement/Reemployment Action appropriate?

Exercise 3.3 – Reinstatement/Reemployment

ZPAA076

Scenario

Karla Hart formerly worked with the State of North Carolina and left for the private sector. After only a few months, she decided to come back to the State. The employee is returning to Cultural Resources as an Information & Communications Spec I, which is the same position (salary and grade) that she held before she left. The salary is the minimum of the salary range.

While she was out, she completed the qualifications for a licensed counselor.

NOTE: In your work environment, you only add a certification or license when it is a requirement of the position. In Karla's case, the license is not a requirement but is being presented here for you to enter in order to give you the training experience.

If a returning employee's data on an infotype has not changed, you STILL save the infotype in the Action.

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Wait for the Instructor or Navigator to Approve PCR

III. Complete approved PCR

Part I – Initiate Workflow

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. Assume you have already run the Cross Verification Report and verified that the employee **was** previously in BEACON. Assume you also used PPOSE and verified that the position is vacant.
2. Type **ZPAA076** in the Command field on the Easy Access screen.
3. Click **Enter** . The Employee Action Request screen is displayed.

4. Enter the following data:

Field	Value
Personnel number	Use the Karla Hart personnel number from the Data Set that was assigned to your student number. Enter. **NOTE**: You do not need to enter the SSN except on New Hire and Non-Beacon to Beacon Actions.
Effective on	Today's date
Action Type	Reinstatement/Reemployment
Reason	Select the appropriate reason. The employee was separated three months ago.**01 Rtn S w/in 12 months (same salary/grade)**

5. Click **Enter** .

6. Click **Create** . The second screen of the Employee Action Request screen is displayed. Observe that the Current column has data concerning the employee as a quick reference.

7. Enter the following data:

Field	Value
EE Position	Observe that the position field is 9s. When an employee is separated, the position field is either automatically changed to 9s by the HR/Payroll system, or in the case of a Separation Pay Continuation, by the Master Data Maintainer. Use the Information & Communications Spec I position number from the Data Set that was assigned to your student number. Observe that the Employee Group and Employee Subgroup fields are now populated.
EE Group/Subgroup	Change to the appropriate subgroup to indicate that the employee is full time, subject to overtime. **B1** **NOTE**: When the Position number is entered, the Employee Subgroup defaults to FT N-FLSAOT Perm and must be changed as applicable for the Action.
Annual Salary	Minimum of salary range

NOTE: By design, the step-by-step directions to complete the Action are deliberately missing in this exercise. Use the information you have learned in previous exercises to complete the application sections.

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number with the date
- Write a note for the approvers
- Initiate Workflow

Part II – Wait for Instructor or Navigator to Approve the PCR

There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

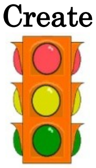
Part III – Complete Approved PCR

NOTE: In this exercise, you are entering data on an employee who already exists in the system. As a result, on each infotype you will receive a message indicating that the previous record will be delimited. Press Enter or click the Enter button to bypass the warning.

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR. As the Initiator:

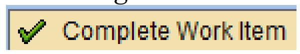
- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process each infotype as applicable as outlined below. Remember that on the Actions and Basic Pay infotypes you should always use Edit > Maintain text to write the appropriate note
- Explicitly complete Workflow item

Field	Value
Addresses (IT0006) Permanent **NOTE:** Enter address information on Address line 1.	3368 Ali Katt Avenue Apex, NC 27502 Telephone: 919-257-4578 (don't forget to select the type)
Federal Withholding (IT0210)	Single, with 1 allowance

State Withholding (IT0210)	Single, with 1 allowance
Addresses (IT0006) Emergency	Add the name Darren Deeds. The address stays the same.
Monitoring of Task (IT0019)	End of probation – 9 months from today
Create I-9 Status (IT0094)	US Citizen NC Dr. License #7761272; Issued 07/01/2009, Exp. 07/01/2017 Valid Social Security Card
Communication (IT0105)	919-707-4566
Create Planned Working Time (IT0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure. **It is especially important to check the part-time box** when applicable. For this exercise, accept the default. Observe that when you press Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field. Enter and Save
Create Basic Pay (0008) 	Reason: **Reinstatement/Reemployment** Salary defaulted from WF
Possible subsequent activities	Enroll the employee into TSERS
Create Bank Details (IT0009)	
Bank routing	011001742 – Bank of America
Bank account number	2157884 Change to **Direct Deposit**

Bank Control key	01 (01 is checking; 02 is savings). Observe that when the employee separated, the bank method field automatically defaulted from direct deposit. You must change the default back to direct deposit. Accept delimit message.
Create Additional Personal Data (IT0077)	Ethnic Origin – use your own Military Status – Inactive Veteran Status – Recently Separated Veteran (07/04/2011) Disability Status – None/prefer not to report
Subtypes for infotype "Education"	Master's degree from Wake Forest 10/01/1998 to 12/15/2002
Create Monitoring of Tasks (IT0019)	Reason: Credential Verification. Indicate that you will verify within 60 days, and that you want to be reminded 15 days prior.
Subtypes for infotypes "Certification and Licensing"	Select 0011 – Licensed counselor.
Create Certification and Licensing (IT0795)	The Start and To dates must be exactly the same as the Valid from and Valid To dates.
Start Date	06/30/2008
To Date	06/30/2012
Identification	The certificate # is NC0932454
Doc Status	Select Renewable
Valid from field	06/30/2008
Valid to field	06/30/2012
Copy Date Specifications (IT0041)	Delete the Last Day Worked information. Verify dates and Save.
Create Objects on loan (IT0040)	Office key #987

8. Click the **Back** button when you are automatically returned to the Personnel Actions screen.

9. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item 

.

   NOTE: It is critical that you complete this last step.

Questions

Answer the following questions.

Question 1

True or False. You should always save a pre-populated infotype, even if you did not make changes to it.

Question 2

What was the major difference in the infotypes that were presented in the Reinstatement/Reemployment Action as opposed to a New Hire Action?

Question 3

If an infotype has blank required fields for which you do not need to enter data, should you use the Next record button or the Save button?

This exercise is complete.

Exercise 4.1 – Salary Adjustment

ZPAA076

Scenario

Assume today is the first day of next month. The supervisor of the first employee you hired (Exercise 2.1) has been in a serious accident and is out on leave for at least four months. Your employee, who is a Digitization Clerk, is being asked to assume some of the major responsibilities of the supervisor (Digital Project Manager) for a specific length of time. Adjust the salary of the Digitization Clerk so that the employee is receiving acting pay of an additional $4,000. The effective date is the 1st day of next month and will end four months from that date. In your work environment, you would use PA30 to enter a reminder (Monitoring of Tasks) to remove the acting pay from the employee at the end of four months.

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Wait for Approver to approve PCR

III. Complete approved PCR

Part I – Initiate Workflow

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. Access **ZPAA076** and enter the following data:

Field	Value
Personnel number	Use the employee name you hired in Exercise 3.1
Effective on	1st day of next month
Action Type	Salary Adjustment
Reason	Acting Pay

2. Click **Enter** .
3. Click **Create** . The second screen of the Employee Action Request screen is displayed.

4. Enter the following data:

Field	Value
Annual Salary	Add $4,000 to current salary. **NOTE:** The resulting salary will place the employee in "Z" step. In addition to the note in Workflow, you would write the appropriate note on both Actions and Basic Pay infotypes to explain the reason for the increase.

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

Part II – Wait for Instructor or Navigator to Return the PCR

There are two approver levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

Part III – Complete Approved PCR

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR.
- Enter the applicable date and select the Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate:
    - **CAUTION!** Do <u>not</u> enter an end date on IT0001. Even though the Salary Adjustment is for only 4 months, you do not enter an end date on the Salary Adjustment Action. At the time that the salary adjustment ends, you will use a new Action (Cancel Salary Adjustment) to end the current Action.
    - Don't forget to enter the Reason on IT0008.
- Explicitly complete Workflow item.

Questions

Answer the following questions.

Question 1

Which infotype will you use to enter a reminder to remove the salary adjustment at the end of four months?

Question 2

At the end of four months, which Action do you think you would use to remove the acting pay?

This exercise is complete.

Exercise 4.2 – Appointment Change

ZPAA076

Scenario

Leona Grayson was hired in Cultural Resources as a Historic Sites Specialist I in trainee status, and has completed the training progression. You need to create an Appointment Change to change the employee's status to permanent, full time, not subject to FLSA overtime. In addition, the employee received an increase in salary.

See the Student Guide for information about changing temporary employees to permanent employees.

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Wait for Approver to approve PCR

III. Complete approved PCR

Part I – Initiate Workflow

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. Type **ZPAA076** in the Command field on the Easy Access screen.
2. Click **Enter** . The Employee Action Request screen is displayed.
3. Enter the following data:

Field	Value
Personnel number	Use the Leona Grayson from the Data Sheet assigned to your student number.
Effective on	Today's date
Action Type	Appointment Change
Reason	Trainee to Perm

4. Click **Enter** .
5. Click **Create** . The second screen of the Employee Action Request screen is displayed.

6. Enter the following data:

Field	Value
EE subgroup	A1
Annual Salary	Add $500 to the current salary range.

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

NOTE: If the PCR results in moving the employee from one payroll type to a different payroll type, you will only initiate the WF. When the PCR is approved and back in your inbox, you must contact BEST.

Part II – Wait for Instructor or Navigator to Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will complete this part.

Part III – Process Approved PCR

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR.
- Enter the applicable date and Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate.
    - In this case, you don't need Monitoring of Tasks, therefore, it is appropriate to use next record skip it.
- Explicitly complete Workflow item.

Field	Value
Create Basic Pay (IT0008) 	Reason: Appointment Change Salary defaulted from WF
Monitoring of Tasks (IT0019)	Use Next Record to skip since there is no follow-up tasks for this employee

Questions

Answer the following questions.

Question 1

What field in Workflow did you have to revise to ensure that the employee’s status was changed from trainee to permanent?

Question 2

Did the Workflow Employee Group change?

This exercise is complete.

Exercise 4.3 – Range Revision – Funds Available

ZPAA076

Scenario

OSP has notified you that a range revision for the Historic Interpreter job class has been approved which affected all Docent Coordinator positions. The new range has increased the employee's salary by $1,000.

You have identified that Rose Brown in your Agency was affected by the revision. Funds are available for the employee to receive the full amount. The effective date is today. Observe that the employee's grade has already been changed based on the changes OM Production Support made to the job class.

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Approve PCR

III. Complete approved PCR

Part I – Initiate Workflow

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. Type **ZPAA076** in the Command field on the Easy Access screen.
2. Click **Enter** . The Employee Action Request screen displays.
3. Enter the following data:

Field	Value
Personnel number	Use the Rose Brown from the Data Sheet assigned to your student number
Effective on	Today's date
Action Type	Range Revision
Reason	Labor Market (LM) Full
Annual Salary	Add $1,000 to current salary. Observe that the Grade in the Proposed column reads GR68 (formerly GR62)

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow
- Log out

Part II – Wait for Instructor or Navigator to Approve the PCR

There are two approval levels:

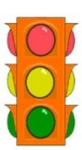
- Agency
- Funding

Your instructor and/or navigator will complete this part.

Part III – Process Approved PCR

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR. As the Initiator:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate
- Explicitly complete Workflow item

Field	Value
Create Basic Pay (IT0008) 	Reason: Range Revision

Questions

Answer the following question.

Question 1

What must take place prior to initiating ZPAA076-Workflow approval process?

This exercise is complete.

Exercise 4.4 – Range Revision – No Funds Available

ZPAA076

Overview

When a Range Revision is processed and no funds are available, there are additional steps that must be implemented. First, you must make an entry on the employee's record that a Range Revision was authorized, but that no funds are available. Then you must put the balance of the funds in reserve. This step is necessary in case the funds are eventually released, and the employee is entitled to some or all of the reserve funds. Later, if some or all of the funds are released, another Range Revision Action with an applicable reason will need to be processed. In addition, the applicable adjustment will need to be made to the PA30 Wage Maintenance infotype.

For this exercise, the funds of $1,500 will be released in two increments ($500 and then $1,000).

This exercise contains three scenarios. Each scenario has four parts. You are responsible for Parts I, III, and IV:

I. Initiate Workflow (WF)

II. Wait for Instructor or Navigator to approve PCR

III. Complete approved PCR

IV. Process PA30 to reserve the balance

Scenario A: Part I – Initiate Workflow

OSP has notified you that a range revision for the Accounting Clerk job class and position has been approved. Additionally, you have been notified that both the job class and the position have been changed by Shared Services to reflect the revision from Grade 59 to 61. The range revision increased the compensation range of the position by $1,500. You have identified that one employee (Emily Stafford) in your Agency was affected by the revision. However, there are no funds for an increase to the employee. The effective date is today. Observe that the employee's grade has already been changed based on the change that OM Production Support made to the job class. You need to enter the Range Revision and then reserve the balance for the employee.

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. Type **ZPAA076** in the Command field on the Easy Access screen.
2. Click **Enter** . The Employee Action Request screen is displayed.

3. Enter the following data:

Field	Value
Personnel number	Use the Emily Stafford from the Data Sheet assigned to your student number. 80000224
Effective on	Today's date
Action Type	Range Revision
Reason	LM No Salary Adjustment

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Enter the employee's CURRENT salary
- Initiate Workflow

Scenario A: Part II - Instructor or Navigator will Approve the PCR

There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will complete this part.

Scenario A: Part III – Process Approved PCR from Initiator's Inbox

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate
- Explicitly complete Workflow

Field	Value
Basic Pay (IT0008)	Reason: Range Revision

Scenario A: Instructions Part IV – Reserve the balance in PA30

Reserve the balance in the employee's wage maintenance infotype

You must now put the money on reserve by modifying the employee's Wage Maintenance (0052) infotype. Use the **Create** function to enter the data. The effective date is the same as the Range Revision. Observe when you access the Wage Maintenance infotype, there are several blank fields. Those do not require data entry, and they are not supposed to default from any previous entry.

4. From the Easy Access screen, enter **PA30** in the Command field
5. Enter the **employee's personnel number** (be sure you use the same one you used in the first part of the exercise).
6. Enter **IT0052** (Wage Maintenance) and **subtype 0100** (Future Adjustment Range Revision).
7. Click **Enter** to validate.
8. Click the **Create** icon.
9. Type **today's date** in the Start Date field.
10. Type the amount being reserved in the Amount field (for this example, enter $**1,500.00**).
11. **Enter** and **Save**.

Scenario B: Part I – Initiate Workflow

Assume that it is 15 days from the current date. You have received word that $500 of the money has been released. You will go back to Workflow and submit another PCR for a Range Revision with the new date, reason and salary amount.

12. Create a new **WF**.
13. Be sure to use **15 days** from today as the effective date.
14. Reason for this new Action is: **Labor Market Partial**.
15. The new salary is: **the original salary plus $500.00**.
16. Notes: **Range Revision – Partial – Emily Stafford**

Scenario B: Part II - Instructor or Navigator will Approve the PCR

There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will complete this part.

Scenario B: Part III - Process the Approved PCR as the Initiator

17. Access the Inbox and process the PCR.

Scenario B: Part IV - Reduce the Wage Maintenance Balance

You must now decrease the amount on the employee's Wage Maintenance infotype by $500.

18. Enter **PA30** in the Command field.
19. Enter **employee personnel number** (verify you have selected the correct one).
20. Enter **0052** in the Infotype field and **0100** in the Subtype field.
21. Click the **Copy** button.
22. Change the date to **15 days from today's date** (it is always the same date that you entered the Range Revision to give the released funds to the employee).
23. In the Amount field, highlight the $1,500 to delete it and enter **$1,000** in the amount field (the sum when you subtract $500 from $1500).
24. **Enter** and **Save**.
25. Select the **Overview option** on the infotype. You should have two line items: one for the original $1,500 and one for $1,000.

Scenario C: Part I - New Range Revision – More Funds Have Been Released

Assume that it is 30 days from today. You have received word that the rest of the reserve money ($1,000) has been released. You will go back to Workflow and submit another PCR for a Range Revision with the new date, reason and salary amount.

26. Create a new **WF**.
27. Be sure to use **30 days** from today as the effective date.
28. Reason for this new Range Revision action is: **LM After effective date complete.**

29. The new salary is: Add **$1000** to the current salary.

Scenario C: Part II - Instructor or Navigator will Approve the PCR

There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will complete this part.

Scenario C: Part III - Process the Approved PCR

30. Access the Initiator Inbox and process the PCR

After the Range Revision is complete, you must then access PA30. This time, you will **delimit** the balance on the Wage Maintenance infotype.

Scenario C: Part IV - Delimit the Reserve on Wage Maintenance

Because all of the reserved funds have been given to the employee, the reserve must be delimited.

31. Enter **PA30** in the Easy Access Command field.
32. Enter **employee personnel number** and **verify**.
33. Enter **IT0052** and **subtype 0100**.
34. Click the **Delimit** button.
35. On the Delimit pop-up window, enter the **date (1 day past when you gave the remainder of the money)**. You enter 1 day past because SAP will use the day prior to delimit the infotype. So if you want the infotype to show an end date the same as when you gave the remainder of the money, you have to enter the delimit date as one day past).

    NOTE: If the Delimit pop-up window did not display, it is because you did not start from the Easy Access screen. In this case, you must enter the delimit date on the second delimit screen.
36. Click **Continue** button.
37. Select line item (there should only be one line that is displayed for $1,000) and click the **Delimit** button again.
38. To verify both line items are delimited click the **Overview** button. The List Wage Maintenance screen displays.

39. Result: You will see both line items delimited (one for $1,000 and one for $1,500).
40. While you are on the List Wage Maintenance screen, **select the line item with the $1,000 delimited amount**.
41. Click the **Copy** button.
42. Click **Edit > Maintain Text** and write a note that indicates all funds have been distributed.
43. Click **Save** to save the note.
44. Click **Save** at the Copy Wage Maintenance screen.
45. Press **Enter** to bypass the warning that a record will be deleted.
46. Click the **Back** button to return to the Maintain HR Data screen.
47. Select the **All** time period.
48. Use the **Display function** to view both infotypes and read the accompanying note.

    NOTE: You have to delimit manually ---- Make sure you set the date to cover last action.

Questions

Answer the following questions.

Question 1

When funds are available, which Action would you use to increase the salary?

Question 2

What must take place prior to initiating ZPAA076-Workflow approval?

Question 3

If you were not sure whether use to the reason “Labor Market Full” or “Labor Market After Effective Date Complete”, how do you make the determination?

This exercise is complete.

Discussion - Reallocation

You will not perform an exercise for Reallocation. The instructor will walk through the steps with you. The steps for Reallocation are very similar to the ones you performed in the Range Revision, with the obvious difference of the Action and reasons. In Reallocation, your Agency HR section must make changes to the *position* before you can do the PA Reallocation Action

Scenario

Carol Adams holds a Wildlife/Fisheries Tech I position. The position has been reallocated to a Wildlife/Fisheries Tech II. Her current salary is $33k. She is approved for an increase to $36,300 (a 10% increase), but funds are only available for 5% ($34,650) at this time. Create the applicable Actions and transactions to indicate that Carol has the Reallocation and new salary, and also that the extra $1,650 are reserved.

Instructions

Use the Business Process Procedure (BPP) to complete the exercise scenario.

Reallocation Action

There are several Actions and transactions needed to complete this scenario. First, if no funds are available, you must make an entry on the employee's record that a Reallocation was authorized, but no funds were available. Then you must put the balance of the funds in reserve. This step is necessary in case the funds are eventually released, and the employee is entitled to some or all of the reserve funds.

Enter Reallocation on the employee's record

1. Verify employee's current salary (PA20, Basic Pay IT0008. In this scenario, the salary is $33,000.
2. Initiate transaction code **ZPAA076**
    - Action type: **Reallocation**
    - Reason: **Real Inc - Partial**

Personnel Actions:

3. When PCR is approved, execute from your Inbox to access the Personnel Actions screen.
4. Enter the **date** (the same as the PCR).
5. Select **Reallocation**.
6. Click **Execute** .
7. **Save** infotypes as applicable.
8. On the *Create Basic* Pay infotype (IT0008), enter **reason code ZA (Reallocation)**.

Reserve the balance in the employee's wage maintenance infotype

You must now put the remaining money on reserve by modifying the employee's Wage Maintenance infotype. Use the **create** function to enter the data. The effective date is the same as the Reallocation. Observe when you access the Wage Maintenance infotype, there are several blank fields. Those do not require data entry, and they are not supposed to default from any previous entry.

9. From the Easy Access screen, enter **PA30** in the Command field
10. Enter the **employee's personnel number** (be sure you use the same one you used in the first part of the exercise).
11. Enter **Infotype 0052** (Wage Maintenance) and **subtype 0200** (Future Adjustment Reallocation).
12. Click **Enter** to validate.
13. Click the **Create** icon.
14. Type **today's date** in the Start Date field.
15. Type the amount being reserved in the Amount field (for this example, enter **$1,650.00**).
16. **Enter** and **Save**.

Questions

Answer the following questions.

Question 1

If you executed a Reallocation and no funds were available, what Action and additional step would you use to increase the salary when funds do become available?

Question 2

What must take place prior to initiating ZPAA076-Workflow approval for a Reallocation?

This exercise is complete.

Exercise 5.1 – Promotion

ZPAA076

Scenario

The supervisor for Karla Hart is promoting her from an Informational & Communications Spec I position to an Informational & Communications Spec II position. The promotion will be effective as of the 15th of the next month. The accompanying pay increase is in accordance with State policy. Process the promotion in SAP.

Don't forget! You must have reinstated the Karla Hart assigned to you in a previous exercise before you can promote her.

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Wait for Instructor or Navigator to approve PCR

III. Complete approved PCR

Part I – Initiate Workflow

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. Before you begin, use **PA20** to view the Actions infotype to make sure that the Karla Hart assigned to you indicates "Reinstated" as her last action.
2. Access **ZPAA076**.
3. Click **Enter** . The Employee Action Request screen displays.
4. Enter the following data:

Field	Value
Personnel number	Use the Karla Hart from the Data Sheet assigned to your student number
Effective on	15th of next month
Action Type	Promotion
Reason	Promotion
Annual Salary	Enter the minimum of the new position's salary range

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow
- Log out

Part II – Wait for Instructor or Navigator to Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

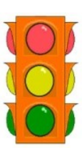
Your instructor and/or navigator will complete this part.

Part III – Process Approved PCR

NOTE: If the PCR results in moving the employee from one payroll type to a different payroll type, you would not process the PCR. Contact BEST.

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR.
- Enter the applicable date and Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate.
- Explicitly complete Workflow item.

Field	Value
Create Basic Pay (IT0008) 	Reason: **Promotion**

Exercise 6.1 – Separation

ZPAA076

Overview

Cost Distribution: The Cost Distribution infotype displays in both types of Separation Action. In each case, you save the infotype to create the existing record. This record is needed in order to process any subsequent payouts to a separated employee who is in withdrawn status.

CAUTION! You should always ensure that time evaluation has been run for the employee and that the time balances to be paid out are accurate. Check to see that the last timesheet has been entered, released, and approved.

Separation Date: The State of North Carolina defines your effective separation date as the last day you are still an employee. The OSC HR/Payroll system defines it as the last day you are no longer an employee. DO NOT add a day to the Employee Action Request, nor any of the infotypes in the Personnel Action (except IT0416). The system automatically adds one day to the last day worked within the action. However, you must change the date on the Create Time Quota Compensation (IT0416) infotype to the effective date of the Action. This infotype only displays if you selected a leave payout subtype.

Scenario

Nicole Ahrens has informed you that the 15th of next month is the last day she will work. She is resigning effective that day for personal reasons and has leave that needs to be paid out. As you enter the Separation Action, you should remember to delimit any items on loan that the employee returned. If the employee has not returned the items on loan, but you need to process the Action in order to get him or her off payroll, you can go ahead and complete the Separation Action, but in that case, do not delimit the items on loan. You should then complete a PA30 on Monitoring of Tasks (0019) to create a reminder to retrieve the items.

Part I – Initiate Workflow

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. Type **ZPAA076** in the Command field Log the Easy Access screen.
2. Click **Enter** . The Employee Action Request screen is displayed.

3. Enter the following data:

Field	Value
Personnel number	Use the Nicole Ahrens from the Data Sheet assigned to your student number
Effective on	15th of next month
Action Type	Separation
Reason	Personal Reasons

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Don't forget to enter the Last Day Worked.
- Write a note for the approvers
- Initiate Workflow
- Log out

Part II – Wait for Instructor or Navigator to Approve the PCR

There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will complete this section.

Part III – Process Approved PCR from Initiator's Inbox

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR. As the Initiator:

- Execute the approved PCR.
- Enter the applicable date and Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate.
    - Subtypes for infotype Time Quota compensation pop-up: select vacation payout
    - Infotype 0416: Change the Date!
    - Enter hours equal to those in the Rem. Column.
- Explicitly complete Workflow item.

Questions

Answer the following questions.

Question 1

What is the main difference between a Separation Action and a Separation Pay Continuation Action?

Question 2

Which infotype must be delimited when a Separation occurs?

This exercise is complete.

Exercise 6.2 – Separation Pay Continuation

ZPAA076

Overview

When you initiate a Separation Pay Continuation, there are at least 3 aspects of the process (1) Separation Pay Continuation Action (2) PA30 Monitoring of Tasks (3) Separation Action

Position number IT0000 - Actions

In the Separation Pay Continuation, OSC HR/Payroll SAP does not default the position to 99999999. You must manually change the position to the default value in order for the position to show as vacant. **Do not change** the position number to 9s **in Workflow**. You **change** the position number to 9s **on the Actions infotype** when you process the approved PCR (Personnel Actions).

Assignment button IT0001 – Organizational Assignment

On a Separation Pay Continuation during the Action, you must use the Assignment button on IT0001 to enter the Org Unit to which the position belongs. If you fail to process this step, you will not be able to create a Separation Workflow.

Effective Date

The State of North Carolina defines your effective separation date as the last day you are still an employee. OSC HR/Payroll SAP defines it as the last day you are no longer an employee. DO NOT add a day to the Employee Action Request, nor any of the infotypes in the Personnel Action (except 0416). OSC HR/Payroll SAP automatically adds one day to the last day worked within the action. However, you must change the date on the Create Time Quota Compensation (0416) infotype to the effective date of the Action. This infotype only displays if you selected a leave payout subtype.

Monitoring of Tasks

Create a PA30 Monitoring of Tasks to remind you at the end of the pay continuation to go in and initiate a regular Separation. For the following exercise (Inez Hayes), you would enter a due date that is 4 months from the Separation Pay Continuation Action to remind you to execute a regular Separation on that date. If the Separation Pay Continuation is for a law enforcement office, enter the date of the task **as the last date of the month** in which the employee turns 62, with a reminder 2-3 weeks prior that you must complete a regular Separation. If the law enforcement employee is on Separation Pay Continuation and dies prior to his or her 62nd birthday, a Separation would need to be created.

IT0041 if RIF

When the Separation Pay Continuation is due to RIF, IT0041 must be used to document when the employee was notified of the RIF.

> **CAUTION!** You should always ensure that time evaluation has been run and that time balances to be paid out are accurate.

Scenario

The department for which your employee (Inez Hayes) works is being downsized. As a result, Inez will be given severance for 4 months. Inez has applicable leave that she wants to be paid out also.

There are four parts to this Exercise:

I. Initiate Workflow (WF)

II. Wait for Instructor or Navigator to approve PCR

III. Process Approved PCR

IV. Complete the PA30 transaction

Part I – Initiate Workflow

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. Type **ZPAA076** in the Command field on the Easy Access screen.
2. Click **Enter** . The Employee Action Request screen is displayed.
3. Enter the following data:

Field	Value
Personnel number	Use the Inez Hayes from the Data Sheet assigned to your student number
Effective on	15th of next month
Action Type	Separation Pay Continuation
Reason	RIF Severance and/or Health Ins

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow
- Log out

Part II – Wait for Instructor or Navigator to Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will complete this part.

Part III – Process Approved PCR

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR. As the Initiator:

- Execute the approved PCR.
- Enter the applicable date and Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate.
    - Actions : **change the position number to 9s**
    - Organizational Assignment:
        - Click the **Assignment** button.
        - Click the **Organizational Unit** radio button.
        - Enter: **20010330** (for this scenario. In your work environment, enter the Org Unit to which the position belongs.
        - Click **Continue**. You are returned to IT0001. If necessary, enter 99999999 in the position number field.
        - Click **Save**.
- Subtypes for infotype Time Quota pop-up: **Select Vacation Payout**
- Create Time Compensation:
    - **Change the date!**
    - Enter the **number of hours** that are reflected in the Rem. Column.
    - Explicitly complete Workflow item.

Part IV - PA30

Use the Business Process Procedure (BPP) to complete the exercise scenario.

4. Enter transaction code **PA30** in the command field and click .
5. Select the **employee**.
6. Select the applicable infotype for **Monitoring of Task** and complete the appropriate fields. You want this infotype as a reminder to follow up and perform the regular Separation when the severance ends in four months (remember, the effective day of the Separation for this exercise was the 15^{th} of next month). Complete the following fields:
    - Task Type (120 days)
    - Date of task (date on which the task occurs)
    - Comments

Assume two days have passed (it is now the 17^{th} of next month) and you have been informed the employee was presented with the RIF letter 30 days ago.

7. Select **IT0041**.
8. Use the **Copy** function.
9. Change the **Start date** of the infotype to the 17th of next month.

   CAUTION! If the date you enter the letter notification is the same or precedes the date of the Separation Action, the infotype will be deleted; otherwise it should delimit.
10. Use the down arrow to select the **applicable date type**.
11. Enter the date the employee was notified (**30 days ago**).

Questions

Answer the following questions.

Question 1

After you enter the Separation Pay Continuation, what is the next step you should take?

Question 2

Which infotype is used to document that the employee received the RIF notification?

This exercise is complete.

Exercise 7.1 – Transfer Within Agency – Lateral

ZPAA076

Scenario

Helen Stephens is an Office Assistant IV at the CR CDS MOA Deputy Director CFO organizational unit. She is making a lateral transfer to the CR CDS MOA Educational Service org unit. She is currently a full-time, subject FLSA employee with the same salary. The effective date is today. At the new division, she receives a cell phone.

Overview

Whether you are the Releasing Agency or the Receiving Agency, you should contact each other to discuss the transfer before processing in the HR/Payroll system. The releasing Agency takes no action in BEACON (except delimit items the employee returned).

If your security access permits, you can see some information on employees from other Agencies. Run the *Verify Employment* BI Report located in the Cross Agency Verification folder.

If you transfer an employee from one *employee type* to a different *employee type*, you must change the Employee Subgroup. If the employee is going from one *payroll type* to a different *payroll type*, you will only initiate the PCR and when it is approved, you will contact BEST.

Two ways to process a Transfer in BEACON

There is only one Transfer Action in BEACON; however, you may process transfers in one of two ways, depending upon your security access.

If you have security access for:

1. Both the *Releasing* Agency and the *Receiving* Agency. SAP allows you to complete all of the infotypes during the Transfer Action.
2. Only the Receiving Agency. SAP allows you to partially complete the Action. In the latter case, you will use PA30 to complete the infotypes.

In this exercise you have authority for both the Receiving and the Receiving Agency.

There are three parts to this Exercise; however you will only be responsible for Parts I and III:

I. Initiate Workflow (WF)

II. Approve PCR

III. Process Approved PCR

Part I – Initiate Workflow (WF) as Initiator

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. Assume you have already run the *Verify Employment Report* and found the employee in the Releasing Agency; assume you also used PPOSE and verified that the position is vacant.
2. On the Easy Access screen, type **ZPAA076** in the Command field.
3. Click **Enter**. The Employee Action Request screen is displayed.
4. Enter the following data:

Field	Value
Personnel number	Use the Data Sheet Helen Stephens personnel number that is assigned to your student number.
Effective on	Today's date
Action Type	Transfer
Reason	Within Agency - lateral

5. Click **Enter**.
6. Click **Create**. The second screen of the Employee Action Request screen is displayed.
7. Enter the following data:

Field	Value
EE Position	Use the Data Sheet Office Administrative IV position number that is assigned to your student number. Enter
EE Group/Subgroup	The Employee Group and Employee Subgroup fields are now populated. When the Position number is entered, the Employee Subgroup defaults to FT Perm (S or N FLSAOT depending upon the position). You should change as applicable for the Action. For this Exercise, save the default.
Annual Salary	Same as previous salary (Hint: look in Current column)

NOTE: Observe that the Last Date Worked field will not be used now, but will be used in later Actions.

8. Click **Enter** .
9. Click **Save** . The Information pop-up is displayed with the assigned PCR number.
10. Write the PCR number on the employee paperwork (in class, use your Data Sheet).
11. Click to close the pop-up.
12. Click **Services for Object** . **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.
13. Select **Create > Create Note**.
14. Enter a **note title**.
15. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date.

    NOTE: The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.
16. Click to close the notes. If applicable, close the notes icon menu.
17. Click Initiate WF. The Information pop-up is displayed indicating that the PCR has been submitted.
18. Click to close the Information pop-up. You are returned to the Employee Action Request (first screen).
19. You must now wait until the PCR has been approved and returned to your Inbox.

Part II - Instructor or Navigator will Approve the PCR

There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will complete this part.

Part III – Process Approved PCR from Initiator's Inbox

NOTE: In this exercise, you are processing an employee who already has an existing record; therefore, each infotype will have a warning message that the previous record will be delimited. Enter to bypass the warning message. Remember to save infotypes.

20. From the Easy Access screen, click **SAP Business Workplace** .
21. Click the **node** beside Inbox Inbox to expand it.
22. Double-click **Workflow**. The PCRs that have been approved (or rejected) are listed in the right column.
23. Select the **PCR** you want to process.
24. Click **Execute** (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is Personnel Actions)
25. On the Personnel Actions screen, enter:

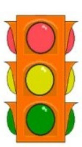
Field	Value
From	Today's date (should always match the date you entered on WF).
Action Type	Transfer

26. Click **Enter** .
27. Click **Execute** .

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

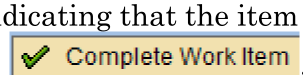
28. Complete the following fields:

Field	Value
Actions (IT0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF

Field	Value
EE Group/Subgroup	Observe the field defaulted from WF If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Enter and Save
Organizational Assignment (IT0001)	Enter and Save
Create vacancy	Yes
Delimit vacancy	Yes
Date Specifications (IT0041)	Review for accuracy Enter and Save
Planned Working Time (IT0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure—company code, personnel area and subarea, cost center, business area, fund and functional area. For this exercise, accept the default. Observe that when you press Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field. Enter and Save
Possible subsequent activities	Use the X to cancel. Since this is a "with-in" Agency transfer, the employee is already enrolled in the applicable retirement from the Releasing Agency.
Basic Pay (IT0008) 	Reason: **Transfer** Observe that Salary populated from WF. Enter and Save
Unemployment State (IT0209)	Save

Field	Value
Objects on loan (IT0040)	If the employee returned the items and the Releasing Agency did not delimit the objects, the infotype will display with the item and the end date of 12/31/9999. In that case, you can either enter your item and complete a PA30 to delimit the Releasing Agency's item, or alternatively, you can delimit the Releasing Agency's item in the Action and do a PA30 to add your item. It doesn't matter as long as you remember to do both if needed. In this case, assume that the employee did not return the item on loan to the previous Agency. However, you are going to enter the cell phone and use PA30 to delimit the ID later. Object on loan field: Use the down arrow to select the cell phone option Number/unit: 1.pieces Loan object #: BR549

29. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).

30. The pop-up is displayed indicating that the item must be explicitly completed. Click Complete Work Item 

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NOTE: It is critical that you complete this last step.

When the Releasing Agency notifies you that the employee has returned the item issued to the employee, follow the steps below to delimit the item (you will not perform these steps in class):

PA30	• Enter the personnel number. • Enter 0040 and choose the applicable subtype for State ID. • Click the Delimit button. • Enter the delimit date in the pop-up. If the pop-up did not display, enter the delimit date in the Delimit Date field. • Click the green check to close the delimit date notice. • Select the line item that contains the items that were issued by the Releasing Agency. • Click the Delimit button.

Questions

Answer the following questions.

Question 1

What is the name of the report that you should view before you transfer a BEACON employee into your BEACON Agency?

Question 2

True or False: You can use the Transfer Action only when you are transferring an employee into your Agency from another BEACON Agency; however, you cannot use this Action to move an employee within your own Agency.

This exercise is complete.

Exercise 7.2 – Transfer – Agency to Agency – Agency – Promotion

ZPAA076

Scenario

Marsha Sanders is being promoted from Facility Survey Consultant I at DHHS to a Facility Planner III at the CR CDS Capital Projects Unit Org unit. She returned the objects on loan to the Releasing Agency, but the HR Master Data Maintainer there failed to delimit the infotype. In addition, your agency issued Marsha a cell phone.

Be sure to read the information in the previous exercise about processing Transfer Actions.

In this exercise, you only have authority for the Receiving Agency and no authority for the Releasing Agency. Therefore, you will only partially complete the infotypes in the Transfer Action. You will finish the infotypes using PA30.

There are four parts to this Exercise; however you will only be responsible for Parts I, III and IV:

I. Initiate Workflow (WF)

II. Wait for Instructor or Facilitator to approve PCR

III. Process Approved PCR

IV. PA30 to complete the infotypes

Part I – Initiate Workflow (WF) as Initiator

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. Assume you have already run the *Verify Employment Report* and found the employee in the Releasing Agency; assume you also used PPOSE and verified that the position is vacant.
2. On the Easy Access screen, type **ZPAA076** in the Command field.
3. Click **Enter** . The Employee Action Request screen is displayed.
4. Enter the following data:

Field	Value
Personnel number	Use the Data Sheet Marsha Sanders personnel number that is assigned to your student number.
Effective on	Today's date

Field	Value
Action Type	Transfer
Reason	Agency to Agency - Promotion

5. Click **Enter** .
6. Click **Create** . The second screen of the Employee Action Request screen is displayed.
7. Enter the following data:

Field	Value
EE Position	Use the Data Sheet Facility Planner III position number in that is assigned to your student number. Press Enter. **NOTE**: When the Position number is entered, the Employee Subgroup defaults to FT Perm. Change as needed for the Action. Save to accept the default.
Annual Salary	The minimum of the salary range for the new position.

NOTE: Observe that the Last Date Worked field will not be used now, but will be used in later Actions.

8. Click **Enter** .
9. Click **Save** . The Information pop-up is displayed with the assigned PCR number.
10. Write the **PCR number** on your new hire paperwork (in class, use your Data Sheet).
11. Click to close the pop-up.
12. Click **Services for Object** . 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.
13. Select **Create > Create Note**.
14. Enter a **note title**.
15. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date.

NOTE: The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.

16. Click the **green check** to close the notes. If applicable, close the notes icon menu.
17. Click Initiate WF. The Information pop-up is displayed indicating that the PCR has been submitted.
18. Click the **green check** to close the Information pop-up. You are returned to the Employee Action Request (first screen).
19. You must now wait until the PCR has been approved and returned to your Inbox.

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will complete this part.

Part III – Process Approved PCR as Initiator

20. From the Easy Access screen, click **SAP Business Workplace** .
21. Click the **node** beside Inbox Inbox to expand it.
22. Double-click **Workflow**. The PCRs that have been approved (or rejected) are listed in the right column.
23. Select the **PCR** you want to process.
24. Click **Execute** (or double-click the PCR line item). The HR/Payroll system automatically takes you to the applicable screen for the Action, (in this case it is Personnel Actions).
25. On the Personnel Actions screen, enter:

Field	Value
From	Today's date
Action Type	Select Transfer

26. Click **Enter** .
27. Click **Execute** .

28. Complete the following fields:

Field	Value
Actions (IT0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF
EE Group/Subgroup	Observe the field defaulted from WF If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Enter and Save.
Organizational Assignment (IT0001)	Enter and Save
Create vacancy	Yes
Delimit vacancy	Yes  STOP!!!!

NOTE: In your work environment, as soon as you click the second "yes", the system automatically takes you out of the Action and returns you to the Personnel Actions screen because you do not have the authority to create a vacancy for the releasing Agency.

In Training, you must manually back out of the Action.

- Click the **Back** button on the Date Specifications infotype to exit the Action and return to the Personnel Actions screen (you perform this step only in training).
- Click **Yes** at the message indicating data will be lost (you perform this step only in training).

The remaining steps are done the same in training as in your work environment.

29. Click the **Back** button at the Personnel Actions screen.

30. The pop-up is displayed indicating that the item must be explicitly completed. Click Complete Work Item [✔ Complete Work Item]. **NOTE:** It is understood that technically you have not completed the work item at this step; however, you are to still select it, and then immediately process a PA30 to complete the item.

Part IV – Process PA30

31. From the Easy Access screen, enter **PA30** in the Command field.
32. If necessary, enter the Personnel number.
33. Select the **Actions** infotype.
34. Select the **All** time period
35. Click the **Overview** button.
36. Select the **Transfer action row** on the List Actions infotype (IT0000).
37. Click the **Copy** icon. The Copy Actions infotype (0000) is displayed.
38. Select the **Execute Infogroup** button on the Change Actions infotype. A message at the bottom indicates the record is stored only in additional infotypes.
39. Click **Save**.
40. Click the **check** to bypass the message that the record will not be saved. The Organizational Assignment infotype (IT0001) is displayed.
41. Click **Save**. Enter to get past the message that indicates the entry deletes a record. The Copy Date Specifications infotype is displayed.
42. Beginning with the Copy Date Specifications infotype, either enter data and save, or just save the infotypes as applicable:
    - IT0041 (Agency date should have pre-populated as the transfer date.)
    - IT0007 Planned Working time – change as necessary and Save
    - IT0008 (**CAUTION!** The reason on 0008 is **always** the same type as the Action name (in this case the Action was **Transfer** even though a promotion was involved).
    - IT0209 Unemployment State - Save
    - IT0040 Enter the cell phone: 919-584-1212
43. When you have completed the last infotype in the series, the HR/Payroll system automatically returns you to the List Actions infotype screen.
44. Click the green arrow **back** to the Maintain HR Master Data screen.
45. Use the **Overview** function to see both items on loan. You should see the item from the Releasing Agency is still active and the cell phone has been added with an end date of 12/31/9999.

46. Verify that the Transfer Work Item is complete (assuming you clicked the Complete Work Item in a previous step as instructed) by checking the Outbox in either the Started Workflows as well as the Work Items Executed folders.
47. In either folder, use the **Workflow tracker** to see that the last item on the list shows that it was processed by you.