OSC TRAINING

WF225

BEACON Workflow for Funding Approvers

TRAINING COURSE

State of North Carolina

Office of the State Controller

July 6, 2016

For assistance with any TRAINING needs, contact:

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TABLE OF CONTENTS

Introduction

Introduction

Overview

Welcome to the *BEACON Workflow for Funding Approvers* training course. This course is for those individuals working at State agencies who approve funding for position actions. In this course you are going to learn how to display a Position/Personnel Change Request (PCR) request from an initiator and approve the PCR or reject it as appropriate.

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

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

Pre-requisites

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

You need to take the following course:

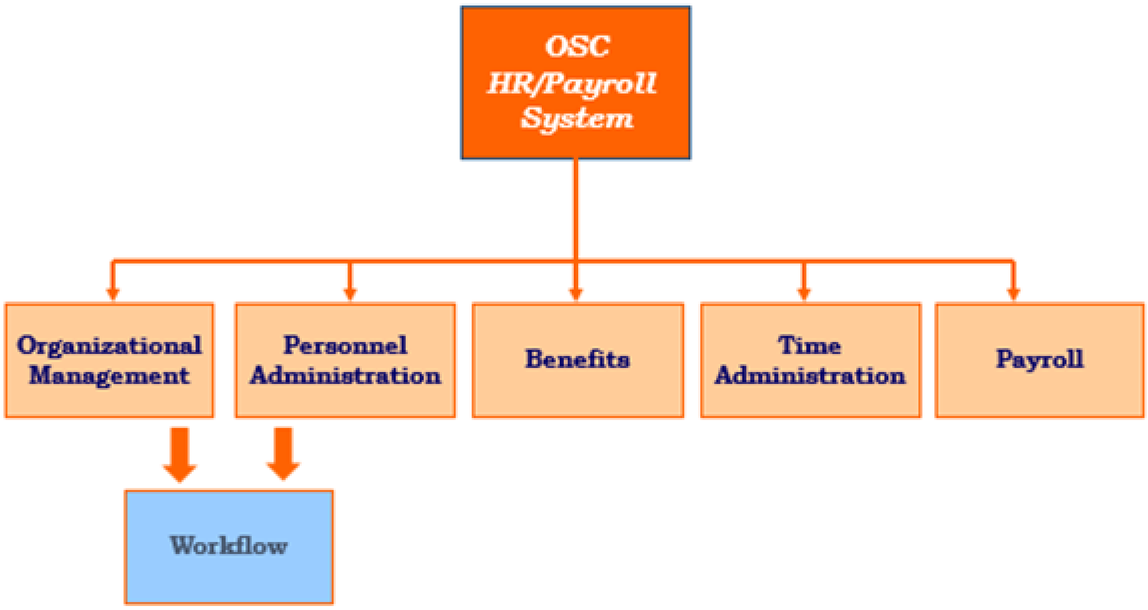
- Organizational Management Overview, OM200

Post-requisites

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

- Business Objects Reporting - (BOBJ410)

OSC HR/Payroll Training Curriculum



The OSC HR/Payroll training program comprises several courses and different modules.

Strategy for Training

<u>Tell Me (Concepts)</u>

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

<u>Show Me (Demonstrations)</u>

- Instructor will demonstrate job-related tasks performed in the OSC HR/Payroll system – HANDS OFF.

<u>Let Me (Exercises)</u>

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

<u>Support Me (Availability)</u>

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

Course Map

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

The lessons covered in this class include:

- Lesson 1: Workflow Overview
- Lesson 2: NCAS Crosswalk
- Lesson 3: Maintain Position
- Lesson 4: Accessing and Navigating Workflow
- Lesson 5: Approving OM & PA Workflow PCRs
- Lesson 6: Course Review

The *BEACON Workflow for Funding Approvers* Student Guide can be used as a reference when you return to the workplace.

Course Objectives

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

- Explain the NCAS budget information and how it is connected to BEACON.
- Enter Cost Distribution using the PO13 - Maintain Position transaction.
- Identify key differences in the routing of Workflow (WF) Items in OM and PA
- Access, navigate and complete items within the Workflow Inbox
- Approve, reserve and replace OM/PA Workflow PCRs

Reference Materials

- Student Guide
- Support Material
  - Business Process Procedures (BPPs)
  - Job Aids
- *What's New*

The material listed above can accessed through the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/

Workflow Overview

Objectives

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

Purpose of Workflow

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

- Division/Agency
- Funding
- OSHR
- OSBM

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

Key Terms

- **Action**: This term is used in both PA and OM to indicate a new or change to an existing position or employee.
- **Documents**: A documents option is contained in both the Inbox and Outbox. Documents are the HR/Payroll system's way of tracking all transactions that take place within the system. You will not use documents very often.
- **Initiator**: The OM or PA user who enters the data for either an OM or PA Action. In PA, the Initiator will ultimately enter the data for the Action into the employee's HR/Payroll personnel record.

- **Routing Tables**: Both OM and PA have a custom table created for the State of North Carolina within OSC HR/Payroll system to hold the list of actions/reasons and logic to support the approval process for positions and employee. The table identifies which Action goes to which approval level.
- **PCR**: A Personnel or Position Change Request (PCR) is a number assigned by the system to each Workflow item. The PCR can be used to identify and track a Workflow item.
- **Workflow Tracker**: a link that will show you the name of the Step, Status, Result, Time & Agent for each Workflow item. The Workflow Tracker shows who initiated, who approved, and who the next approvers are in the process.
- **Workflow Header**: displays the data that was entered by the Initiator for the Workflow item. The Workflow Header answers this question, "What data was used to execute this Workflow item?".
- **Workflow Log**: a more detailed view of the individual steps the document goes through within the Workflow process (detailed Workflow Tracker). The Workflow Log answers the question, "Who has the Workflow item in his/her inbox?".
- **Approver**: Several positions are assigned with approval status at various levels within the organization. The security access assigned to the position determines if the position holder has approval authority for PA, OM, FI or all three. The authority to approve belongs to the position, not the person holding the position. When the person leaves the position, he or she may no longer have approval authority.

  Generally, there are at least two Approvers assigned to each level in an agency or division so that when the Initiator executes Workflow, the PCR is sent to the Inbox of all of the Approvers at that level. This allows the approval process to continue if one of the Approvers is out of the office for a period of time.
- **Substitutions**: Agencies can have a substitute assigned when an individual is out. The Agency must submit a request to BEST Shared Services. The user that is substituting must have the same security role(s) as the one for whom the user is being substituted. The Substitute will see all of the items in the Inbox of the individual for which he or she is substituting.

HR/Payroll System Workflow Process

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

Services for Objects

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

Funding Approver in the Workflow Process

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

OM Workflow Process

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

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

2. OSBM approval is a step in the HR/Payroll system new position Action Workflow process; therefore, it is not necessary to have OSBM approve the funding of a position in a separate form prior to creating the new position (establish position action). OSBM Funding Approval is not required if creating new positions as temporary.

3. After all approvals are final, the OM Workflow item is sent to BEST. They move the position from Planned status to Active status.

PA Workflow Process

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

Workflow Approver Relationships

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

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

🗁 OSBM approval is only required for New Position Action (100) and Re-Establish Action (102).

🗁 OSHR is not an automatic action in the OM Workflow process. The PCR must be manually sent to OSHR.

🗁 PA Workflow does have some reasons that will automatically be sent to OSHR. See those reasons which are detailed in the *Actions Reason Definitions* job aid. For those reasons that are not automatic submissions to OSHR, the Agency Approver (AA1) must manually click the *Send to OSHR* button.

KNOWLEDGE CHECK

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

SUMMARY

In this lesson, you learned to:

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

NCAS Crosswalk

Overview

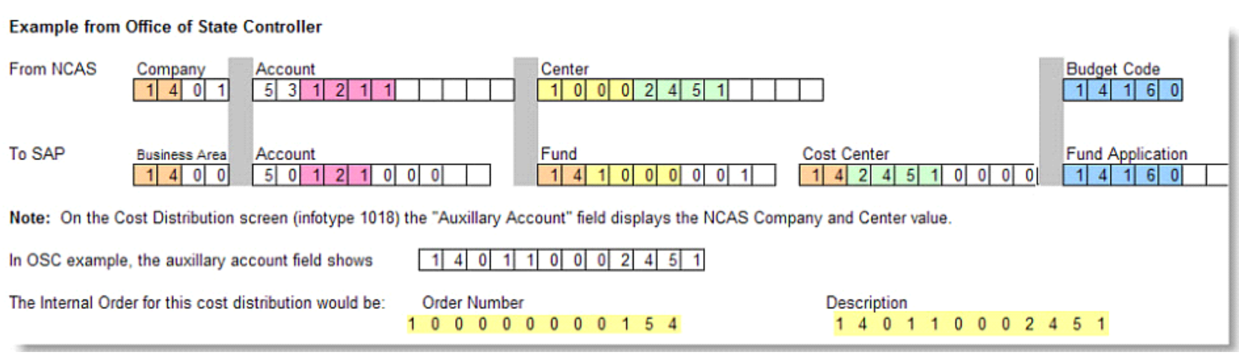
Most OM and PA actions are initiated in Workflow. There are situations where the fund approver will want to correct or update the cost distribution or the salary and it is not necessary to associate it with an action or get agency approval.

Objectives

In this chapter, you will learn to:

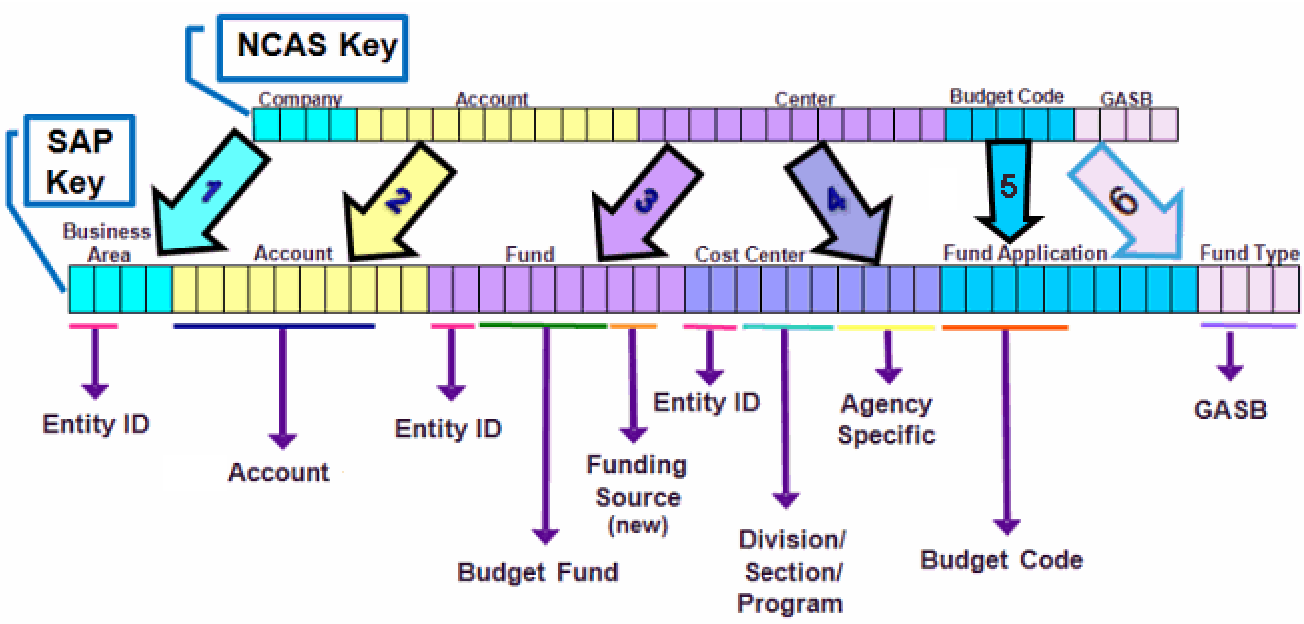
- Explain the structure of the cost distribution
- Describe the Funding infotypes
- Correct salary and/or cost distribution
- Enter the appropriate Reason codes

NCAS Crosswalk



There are system interfaces that crosswalk or "map-to" information from the old Salary Control System (SCS) IBIS and NCAS to the BEACON SAP HR system.

Use the crosswalk below to understand how the components of NCAS cost distribution are determined in the SAP system.



NOTE: There are interfaces that crosswalk data to IBIS for salary control and to NCAS for general ledger posting of payroll expenditures. The internal order description field contains the full NCAS company and center, and the NCAS interface uses this data to crosswalk the payroll expenditures to NCAS.

NOTE: Account is determined by employee group/subgroup and funding source.

Current funding sources include:

- 01 Appropriated
- 04 Federal
- 05 Other Receipts
- 10 Highway (ONLY FOR DOT)

1. Company Code to Business Area

The COMPANY code in NCAS maps to the Business Area in BEACON.

2. Account to Account Area

The ACCOUNT code in NCAS maps to the Account Area in BEACON.

NCAS Account number maps to Account and Sub-Account components in BEACON.

NOTE: The NCAS account is mapped from the SAP Account and Funding Source.

NCAS Account Number	
531211	SPA Appropriated
531212	SPA Receipt Supported
531213	Undesignated Fund (DHHS)
SAP Account	
50 121 000	SPA Salaries

updated - 7-6-16

3. **Center to Fund and Cost Center**

The CENTER code in NCAS maps to the FUND and COST CENTER in SAP. The SAP Fund has three components:

🗁 NOTE: A zero was added to Budget Fund, making it 5 digits.

Funding Source		
01	Appropriated	
04	Federal	
05	Other Receipts	
SAP Fund		
Entity ID = 2 digits Agency Identifier	Budget Fund = 5 digits ending in a final 0	Funding Source New = 2-3 digits
18	**1000 0**	**01 Appropriated**
25 (DMA at DHHS)	**1000 0**	**02 Receipts**

4. **Center to Fund and Cost Center**

The CENTER code in NCAS maps to the FUND and COST CENTER in SAP.

The SAP Cost Center has three components shown on the chart and listed at the right.

NCAS Cost Center		
10102200		
SAP Cost Center		
Entity ID = 2 digits Agency Identifier	Division / Section / Program = 4 digits	Agency Specific is a placeholder (for future use)
14	**2200**	**0000**

5. **Budget to Fund Application**

The BUDGET code in NCAS maps to the FUND APPLICATION in SAP.

The SAP Fund Application uses the same code as the NCAS Budget Code as shown in the example at the right.

NCAS Budget Code
14160
SAP Fund Application
Budget Code = 5 digits
14160

BEACON and IBIS Salary Control

Over the course of the fiscal year, there are many changes that affect positions, budgets, salaries, and labor distributions. These changes have an impact on Agency budgets and salary reserves, so BEACON and the Office of State Budget and Management (OSBM) must interface through a nightly update process

Position salary change information from BEACON SAP creates an output file in a Salary Control Interface Program that is shared with IBIS Salary Control.

Data Searches

There are two search functions that are commonly used to locate data - Matchcode search and Wildcard search.

Matchcode Search

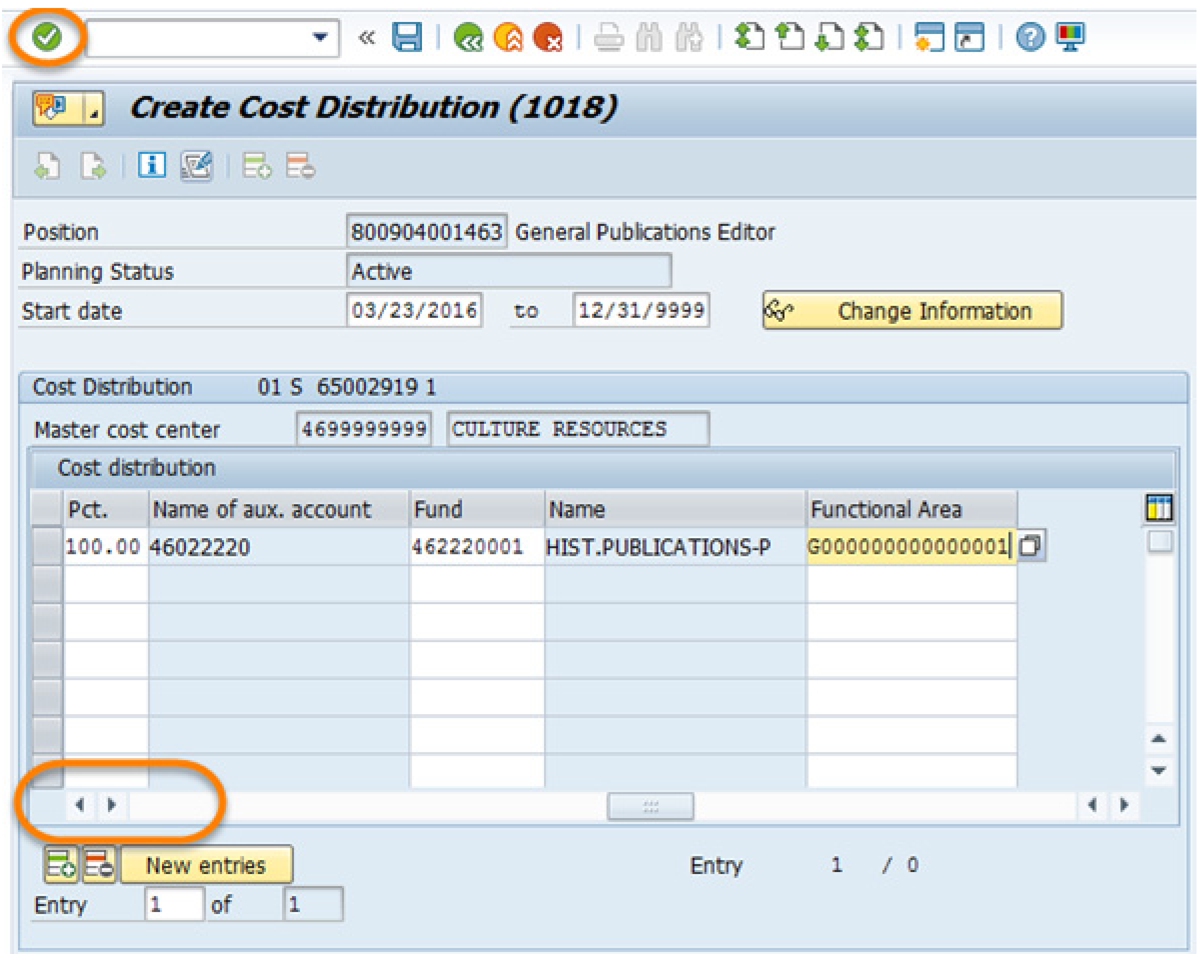
As a Funding Approver, you will usually have the information that you need, but you may use the Match Code feature on this PO13 transaction to conduct searches.

As you are probably aware, the matchcode button is available in many fields in BEACON. As illustrated here, clicking on the match code opens up a second window that allows you to search using any of the tabs that are available.

Wildcard Search

As you are searching, you may use an asterisk * as a wild card placeholder to narrow your selection criteria.

Create Cost Distribution



On the screen above, review the entries for accuracy.

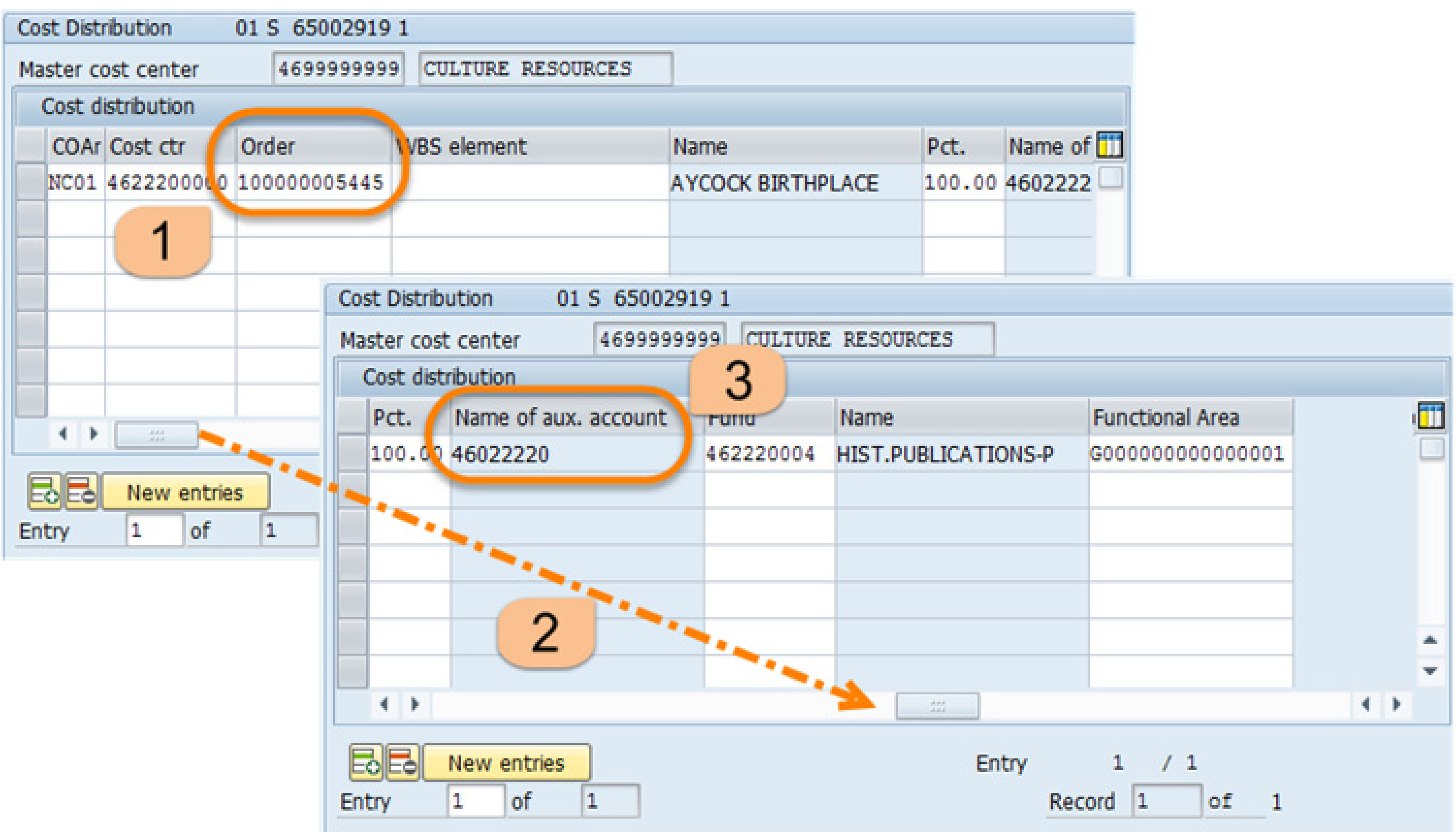
Note the highlighted slide bar at the bottom of the screen. You must drag this bar to the right to view all fields on the screen.

If there are no errors, click the Enter check mark highlighted at the top left of the screen to access the detailed Budget Distribution screen that will display as a pop-up screen.

It is critical to verify that the correct Internal Order Number was entered on this screen because it must be an exact duplicate of the NCAS Company Code and the full NCAS Center. To verify that the Order Number assigned by SAP is correct, you would follow the steps listed below and labeled on this screen.

NOTE: Whenever a Funding or Cost Center changes, the Internal Order will generally change.

1	Review the Order number.
2	Slide the bar at the bottom of the screen segment to view the **"Name of aux account"** field.
3	Review the number in the **"Name of aux account."** This field displays the description for the Internal Order (NCas Company and Center). Make sure that this matches the Cost Center and the Fund. If not, correct using PO13, Maintain Position.

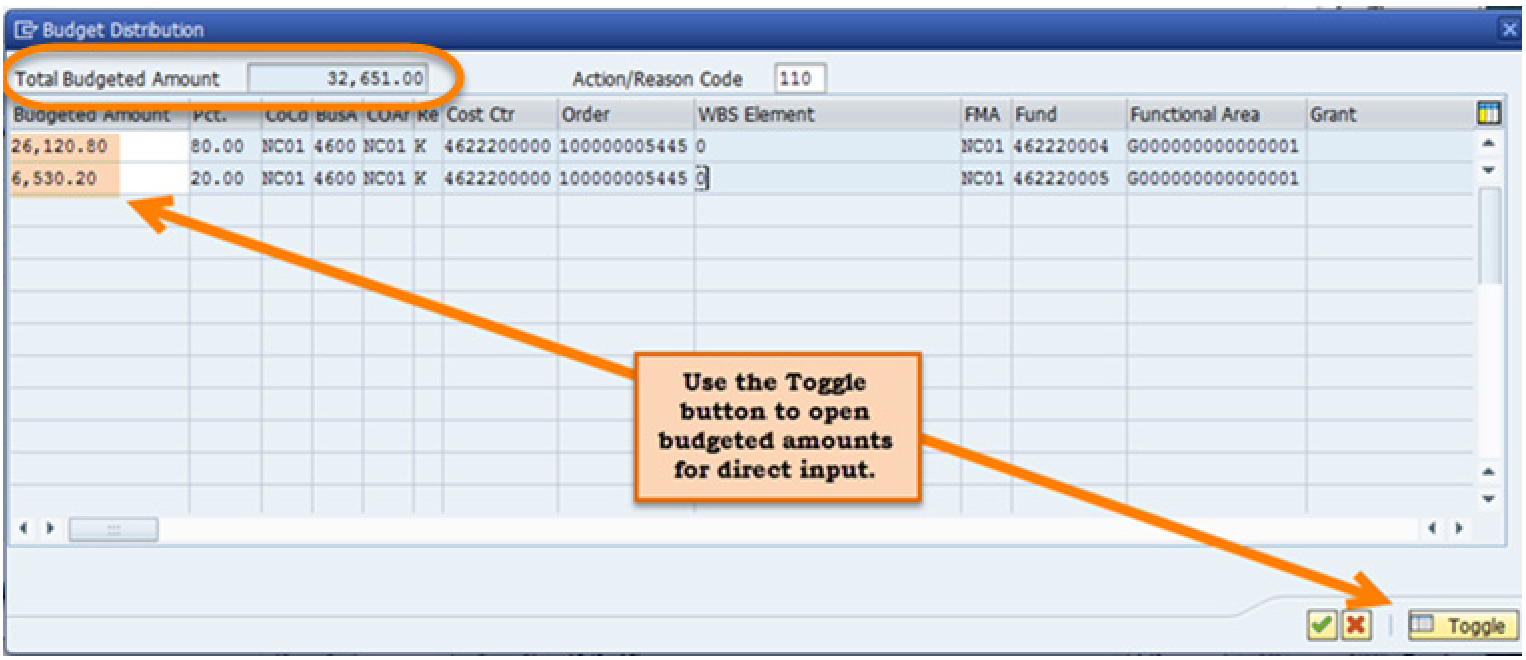


The screen capture above is an example of the IT9018 Budget Distribution pop-up screen that would be displayed after clicking the Enter check mark on the last Create Cost Distribution screen. After verifying that there were no errors on the Cost Distribution Information screen, you would complete the steps listed at the right and labeled on the screen capture above.

NOTE: The Reason code that you enter on this screen is sent to the IBIS Salary Control system and displays on Business Objects (BOBJ) Position reports.

1	Enter the reason for the funding update: 110 – Funding Source Change 111 – Salary Change
2	Make entries in any other fields, as appropriate.
3	Click the **Save** icon and press **Enter** (not displayed on this screen capture).

Whole Dollar Amounts



If you enter the percentages in a split funding situation, the dollar amounts may display as dollars and cents as illustrated in the highlighted area above on this screen. The salary figures in the Budgeted Amount column must be in whole dollar amounts, so these amounts must be corrected.

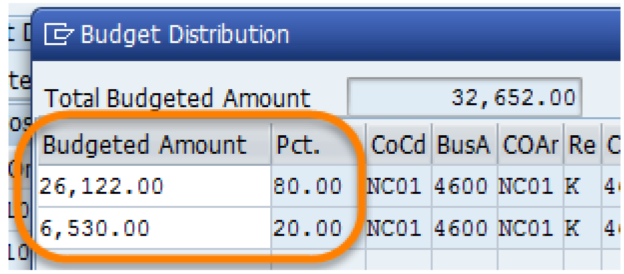
The **Toggle** button indicated by the arrow (bottom right corner of screen) allows you to jump back and forth between *Total Budgeted Amount* and the *Budgeted Amount* detail lines.

To correct the dollar amounts, use the Toggle button to open the *Budgeted Amount* fields and then change amounts to whole dollars. BEACON will automatically re-adjust the percentages if necessary (although the change is slight and will probably not be reflected on the screen).

Use the Toggle button again to close the *Budgeted Amount* fields and open the *Total Budgeted Amount* field.

Click **Next** to see how the screen will change when you have removed the cents in the Budgeted Amount fields.

Now that you have used the Toggle button and corrected the Budgeted Amount fields to whole dollar figures, this is how the screen would display. (See example at right.)



SUMMARY

In this lesson, you learned to:

- Explain the structure of the cost distribution
- Describe the Funding infotypes
- Correct salary and/or cost distribution
- Enter the appropriate Reason codes

Maintain Position

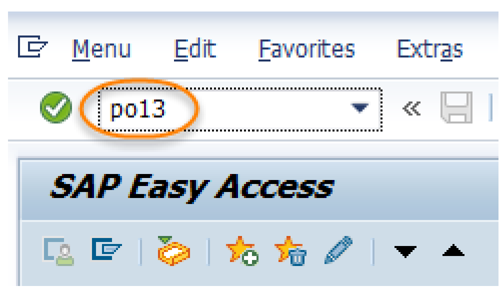
Objectives

- Explain the purpose of Workflow
- Be able to identify Position funding infotypes
- Learn how to maintain Cost and Budget distributions in BEACON (SAP)

Position Funding Infotypes

PO13 - Maintain Position

To access the Maintain Position screen, enter PO13 in the Command Field on the SAP Easy Access screen.



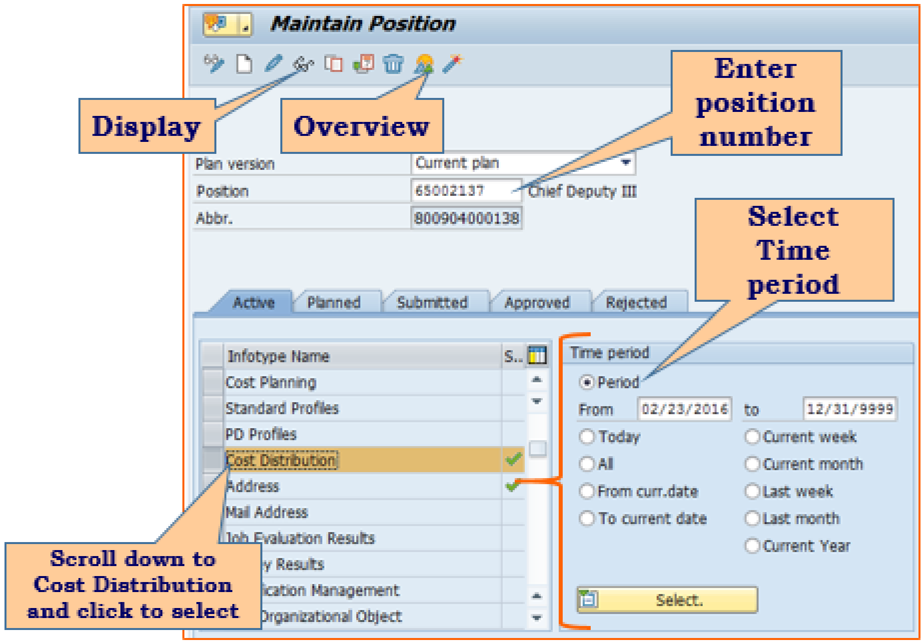
From the Maintain Position screen illustrated below you can:

- View position funding infotypes
- Update position funding infotypes

On the Maintain Position screen, you will enter the position number, time period, and select the infotypes you are going to update: IT1018 or IT9018.

NOTE: If you have been working in this area, be sure to check and enter the correct position number since the number of the last object you accessed will automatically display in the Position field, even if that object was an Org unit or a Job.

View Position Funding Infotypes



To view the funding infotypes (IT1018 and IT9018), select the Cost Distribution infotype (IT1018) and click either icon as illustrated at the top of this screen:

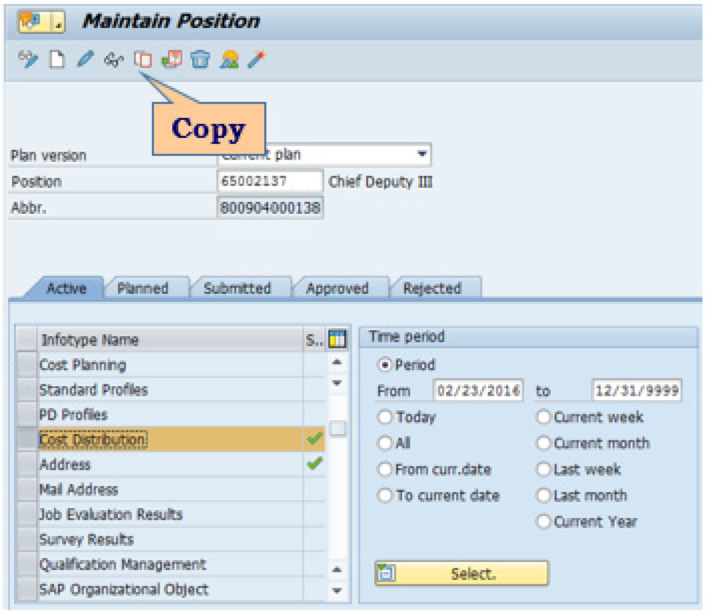
- Display icon  to see the full infotype screen
- Overview icon  to see a list or summary of the entries made for the Infotype

From the Cost Distribution IT1018 screen, press Enter to go to the Budget infotype IT9018.

As mentioned previously, you can also select Display Budget to see IT9018 instead of going through IT1018.

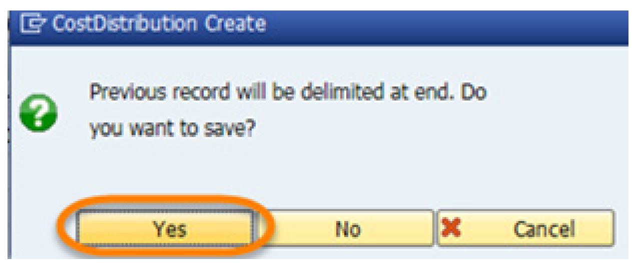
OSC Training
Integrity & Accountability

Updating Position Funding Infotypes



To update or revise position funding data, use the Copy icon to enter the new position funding information and effective date.

After entering the updated funding, a pop-up window displays (see example at right). Click *Yes* on this pop-up to save the action and delimit the previous record. The system then delimits the prior record by entering an effective date of one day prior to the new funding date to maintain accurate history.



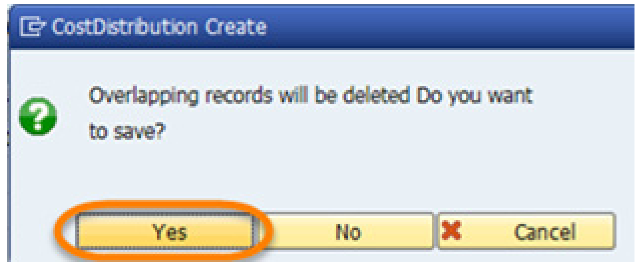
NOTE: The date on the screen defaults to the last entry on the infotype, so it is critical that you change the date to the new effective date. Failure to enter a new date will overwrite existing history. Be sure to enter a new date to maintain the historical record of actions related to the position.

Correcting Position Funding Infotypes

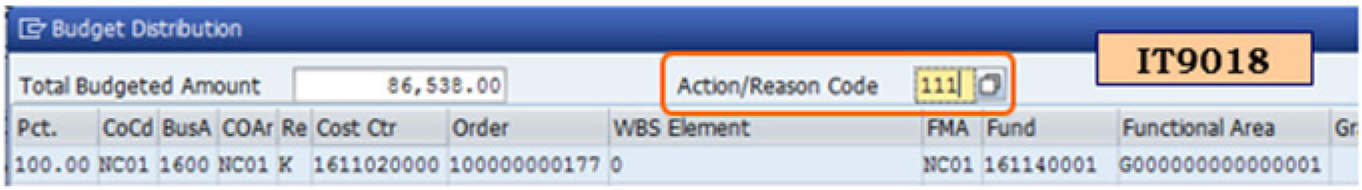
To correct position funding data, use the Copy icon rather than the Change icon to enter the corrected position funding information <u>without</u> changing the effective date.

By leaving the effective date unchanged, you are overwriting the existing data so that the funding history shows no record of the previous incorrect amount.

After entering the updated funding, a pop-up window displays (see example at right). Click Yes on this pop-up to save the action and delete the incorrect data from history.



Reason Codes



As you are making changes via PO13, you will select the appropriate Action/Reason code on IT9018 for the funding change as highlighted above from the following choices:

- 110 - Source of Position's Fund Change
- 111 - Position Budgeted Salary Change

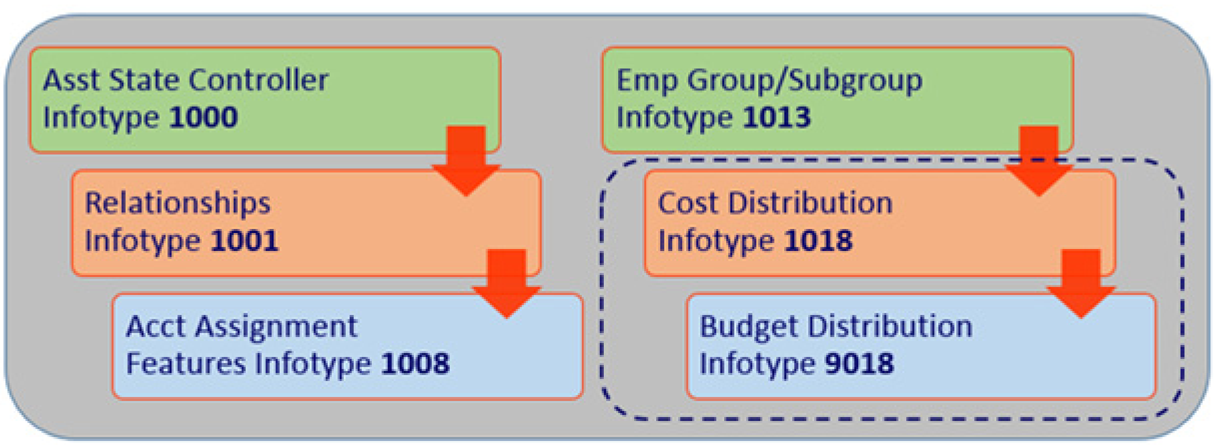
CAUTION: Be careful when selecting the reason code because you will see several other reasons in the drop-down list that are not appropriate for you to use such as *112 - Legislative Increase for Position* (although BEACON will not stop you from doing so).

OM Infotypes

OM Infotypes are screens containing information about a position with a name and numerical code. These relationship Infotypes track:

- **Attributes** - information such as funding, employee group/sub-group, etc.
- **Relationships** - connecting one object to another

As illustrated below, infotypes group pieces of information together into a single file folder. Click on each file tab below to learn more.



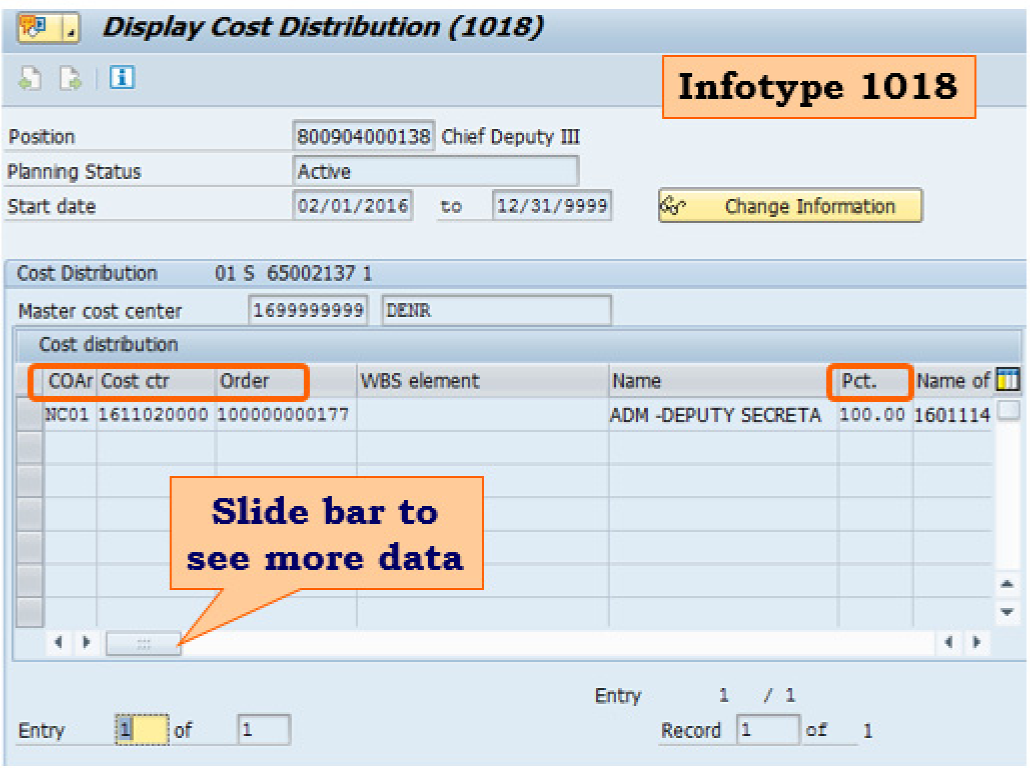
Pay special attention to the infotypes used by Funding Approvers within the blue dotted box.

- **Asst State Controller:** IT1000 Object - holds short and long name
- **Relationships:** IT1001 Relationships - one for each relationship such as Position to Org Unit (S-O), Position to Job (S-C), Position to Person (S-P)
- **Acct Assignment Features:** IT1008 Account Assignment Features - defines the Company Code, Personnel Area/Subarea, etc.
- **Emp Group/Subgroup:** IT1013 Employee Group/Subgroup - defines the Employee Group and Subgroup
- **Cost Distribution:** One of two Infotypes used by Funding Approvers: IT1018 Cost Distribution - used for financial information such as cost center, fund, internal order, etc.
- **Budget Distribution:** One of two Infotypes used by Funding Approvers: IT1018 Cost Distribution - used for financial information such as cost center, fund, internal order, etc.

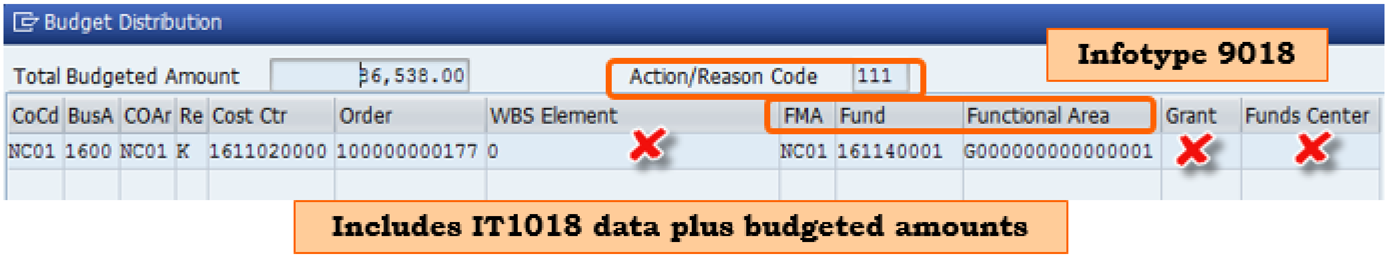
Position Infotypes for Funding

You will access the infotypes through one of these two methods:

- Receipt in your Inbox to process a position ZOMA069 Workflow or a personnel ZPAA076 Workflow
- Using PO13 Maintain Position if the process did not require Workflow



Note the slide bar referenced above to use for scrolling to the right to view all of the screen data.



NOTE: IT9018 is a display-only screen. Changes to the cost distribution fields must be made using IT1018. Only the Budgeted Amount and Action/Reason Code are updated on this infotype.

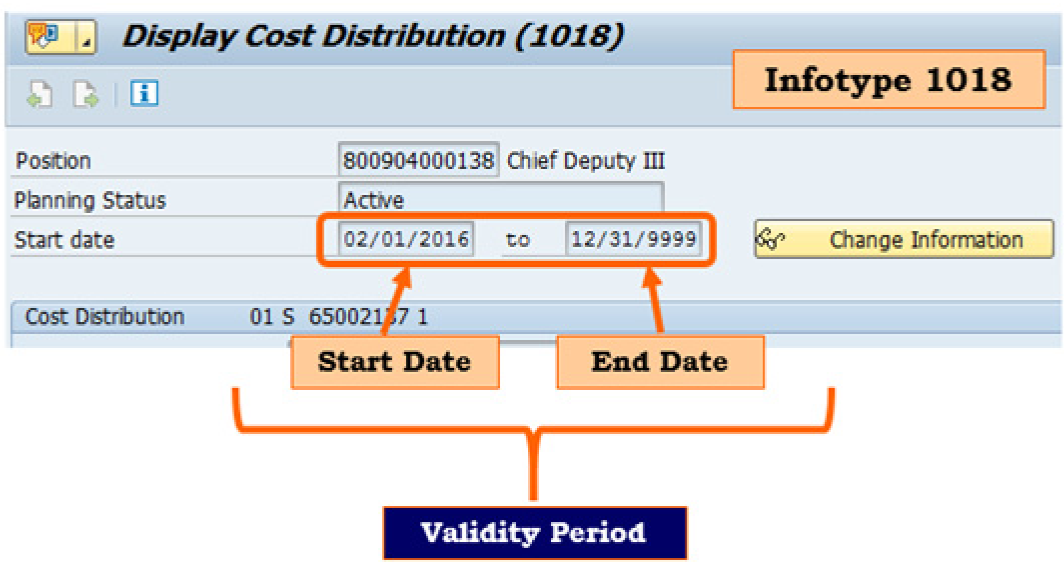
You enter the following fields on IT1018:

- Cost center
- Order
- Percent
- Fund

You enter the following fields on IT9018:

- Budgeted salary
- Action/Reason Code (110 or 111)

Validity Periods



All infotypes must have a Start Date (effective date) and an ending date. The Validity Period highlighted on the screen above. Note that if payroll has already run before this Start Date, the change will not be reflected until the next payroll run.

Although you will always know the Start Date of a record, you won't usually know the end date. For example, if a position is created or funding is revised effective today, the end date for either of those records is unknown. To accommodate for that uncertainty, BEACON automatically assigns a default end date of December 31, 9999 for all current records.

This end date of December 31,9999 is sometimes referred to as the "end of time" in SAP business language.

To maintain a historical record of changes to a position, the system automatically assigns end dates to create an accurate historical record when positions are revised.

The term **Delimit** means to put an end date on a previous record. When a position change is entered, the system assigns an end date on the original record of one day prior to the effective date of the change.

Overwriting History - Appropriate Circumstances

If a position record is corrected because of an error in the original position information, the incorrect data is overwritten rather than delimited by the system, to avoid maintaining incorrect position data in history.

Overwriting History - When to Avoid

If you have more than one funding action that affects a position at the same time, enter different Effective Dates for each action if you want to maintain the history showing these actions.

If this is not possible or appropriate, each budget change will process correctly based on the sequence of your entries, <u>but the history record will not reflect these changes</u>.

> *Example*: An employee receives a Legislative Increase (LI) on 7-01-16. Later in the month, the position funding source changes to Federal Receipts effective 7-1-16. If you enter the funding change with an effective date of 7-1-16, this would delete the LI record. Instead, use another effective date for the funding source change such as 7-2-16 to maintain the position history including the Legislative Increase that occurred on 7-1-16.

* *

EXERCISE 3.1: Logging on to the HR/Payroll System

SCENARIO
Use the following steps to log on to the HR/Payroll system as a Funding Approver.

Instructions

1. Click on the Favorites on your Internet browser to access the Training portal link.
2. Enter the **User ID** and **password** that is assigned to you by your instructor. You will be logging in as a Funding Approver.
3. Click on the **Log on** button.
4. Click **Yes** to confirm the security message displayed.
5. Click on the **SAP GUI tab**.

6. Click on the **training client** specified by your instructor.

7. **Stop** when you have reached the SAP Easy Access screen.

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

8. Select **Extras > Settings** from the menu at the top of the screen to display the settings dialog box.

9. Click the **Display technical names** checkbox.

10. Click the **Continue (Enter)** button. The transaction codes will now display in the menu tree.

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

11. Right-click on **Favorites**.

12. Select **Insert transaction** from the list. A dialog box is displayed.

13. Enter **PO13** in the text box.

14. Click the green check mark to close the box and add the transaction to your Favorites list.

15. Repeat steps 11-14 to add the following transaction to your Favorites.

    - **ZOM0178**

You can also add a bookmark to a web page (URL).

16. Copy the web address as indicated by your instructor for the OSC Training HELP page.

17. Right-click on **Favorites**.

18. Select **Add other objects** from the list. A drop-down list is displayed.

19. Click **Web address or file** from the list. A pop-up box dialog displays.

20. Enter a title for your web page in the **Text** field.

21. Paste the web address you copied in step 15 for the OSC Training HELP page in the **Web Address or File field**.

22. Click the **Continue**  button at the bottom right-hand corner of the box.

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

24. Follow along with your instructor as he/she shows you the following support documentation for Workflow:

    - Job Aids and BPPs
    - *What's New*

* *

EXERCISE 3.2: Update Cost Center

SCENARIO

Effective today, the General Publications Editor position has a different cost center. The budget amount did not change.

- Make the appropriate update to the position to indicate that 1611030000 is the new cost center using the modification transaction (PO13).
- Change the internal order by using the matchcode in the Order field to search for the appropriate order for cost distribution 160111401130*.

Instructions

1. From the Easy Access favorites, click the **PO13** transaction.
2. From the table below, select the Position Number assigned to you by your instructor and enter it into the Position number field.

	POSITION #: General Publications Editor						
A	65002900	F	65002905	K	65002910	P	65002915
B	65002901	G	65002906	L	65002911	Q	65002916
C	65002902	H	65002907	M	65002912	R	65002917
D	65002903	I	65002908	N	65002913	Inst 1	65002918
E	65002904	J	65002909	O	65002914	Inst 2	65002919

3. Press **Enter** . Make sure the Active tab is displayed.
4. Scroll down the list of Infotypes until you see **Cost Distribution**. It will have a green check mark next to it to show that it exists in the system and contains data.
5. Click in the gray box in front of the Cost Distribution infotype to select it.
6. Click the **Display** button on the toolbar at the top of the screen under the Transaction title (Display Position). The Cost Distribution (1018) infotype is displayed.
7. View the data on the screen. Be sure to use the horizontal scrollbar at the bottom of the distribution table to scroll all the way to the right to see all of the information.
8. After viewing the data currently existing for the infotype, click the **Back** button until you return to the SAP Easy Access screen.
9. Click in the gray box in front of the Cost Distribution infotype to select it.
10. Click the **Copy** button on the toolbar at the top of the screen under the Transaction title (Maintain Position). The Cost Distribution (1018) infotype is displayed.

11. Change the **Start date field** to the first day of the current month.

    NOTE: By using the Copy function and changing the start date, you are creating history for this infotype rather than overwriting it.

12. Click in the **Cost Ctr field** and change it to **4620550000**.
13. Click in the **Order** field.
14. Enter **100000005446** click or press **Enter** . The Budget Distribution screen displays.
15. Click the **Matchcode** button in the **Action/Reason Code** field.
16. Select code **110 - Source of Position's Fund Change**.
17. Click the **Enter** button at the bottom right corner of the screen.
18. Click the **Save** button to create your new record.
19. A pop-up box displays asking if you want to delimit the previous record with yesterday's date. Click **Yes**. The system returns to the PO13 - Maintain Position screen.
20. Click the **Back** button to return to the Easy Access screen.

This exercise is complete.

* *

EXERCISE 3.3: Split Funding

SCENARIO

Effective the first day of this month, the Processing Assistant IV for Department of Revenue will be split 70% appropriated in fund 161140001 and 30% receipt supported in fund 161140005. Make the appropriate revisions to the position using reason code 110.

Instructions

1. From the Easy Access favorites, click the **PO13** transaction.
2. From the table below, select the Position Number assigned to you by your instructor and enter it into the Position number field.

	POSITION #: Processing Assistant IV						
A	60081687	F	60081727	K	60081732	P	60081757
B	60081719	G	60081728	L	60081734	Q	60081758
C	60081723	H	60081729	M	60081752	R	60081759
D	60081724	I	60081730	N	60081754	Inst 1	60081760
E	60081725	J	60081731	O	60081756	Inst 2	60081761

3. Press **Enter** . Make sure the Active tab is displayed.
4. Scroll down the list of Infotypes until you see **Cost Distribution**.
5. Click in the gray box in front of the Cost Distribution infotype to select it.
6. Click the **Copy** button on the toolbar at the top of the screen under the Transaction title (Maintain Position). The Cost Distribution (1018) infotype is displayed.
7. Change the **Start date field** to reflect today's date.

   NOTE: By using the Copy function and changing the start date, you are creating history for this infotype rather than overwriting it.

8. On the first line in the Cost Distribution, change the **Pct** field to **70.00 percent**.
9. Change the Fund to **451662001**.
10. On the second line in the Cost Distribution section, enter the following information:
    - Company Code = **NC01**
    - Cost Center = **4516620000**
    - Order = **100000005350**
    - Pct = **30**
    - Fund = **451662005**
    - Functional Area = **G000000000000001**
11. Press **Enter** on the keyboard.
12. Enter **110** in the **Action/Reason Code** field.
13. Click the **Enter** button at the bottom right corner of the screen to return to the Cost Distribution infotype.
14. Click the **Save** button to create your new record.
15. A pop-up box displays asking if you want to delimit the previous record with yesterday's date. Click **Yes**. The system returns to the PO13 - Maintain Position screen.
16. Click the **Back** button to return to the Easy Access screen.

This exercise is complete.

EXERCISE 3.4: Revise Budget

SCENARIO

Effective today, the Administrative Support Specialist for the State Treasurer's Office needs to be changed to $32,150. Use Action/ Reason code 111.

Instructions

1. From the Easy Access favorites, click the **PO13** transaction.

2. From the table below, select the Position Number assigned to you by your instructor and enter it into the Position number field.

	POSITION #: Administrative Support Specialist						
A	60009114	F	60009142	K	60009185	P	60009213
B	60009115	G	60009150	L	60009188	Q	60009220
C	60009136	H	60009168	M	60009189	R	60009222
D	60009139	I	60009172	N	60009202	Inst 1	60009223
E	60009141	J	60009174	O	60009204	Inst 2	60009232

3. Press **Enter** . Make sure the Active tab is displayed.

4. Scroll down the list of Infotypes until you see **Cost Distribution**.

5. Click in the gray box in front of the Cost Distribution infotype to select it.

6. Click the **Copy** button on the toolbar at the top of the screen under the Transaction title (Maintain Position). The Cost Distribution (1018) infotype is displayed.

7. Change the **Start date field** to reflect today's date and press **Enter** on the keyboard. The Budget Distribution screen is displayed.

   NOTE: By using the Copy function and changing the start date, you are creating history for this infotype rather than overwriting it.

8. Enter **32,150** in the Total Budgeted Amount field.

9. Enter **111** in the Action/Reason Code field.

10. Click the **Enter** button at the bottom right corner of the screen to return to the Cost Distributions infotype.

11. Click the **Save** button to create your new record.

12. A pop-up box displays asking if you want to delimit the previous record with yesterday's date. Click **Yes**. The system returns to the PO13 - Maintain Position screen.

13. Click the **Back** button to return to the Easy Access screen.

This exercise is complete.

* *

SUMMARY

In this lesson, you learned to:

- Explain the purpose of Workflow
- Identify Position funding infotypes
- Maintain Cost and Budget distributions in BEACON (SAP)

Accessing and Navigating Workflow

Objectives

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

* *

EXERCISE 4.1: Workflow Overview and Navigation

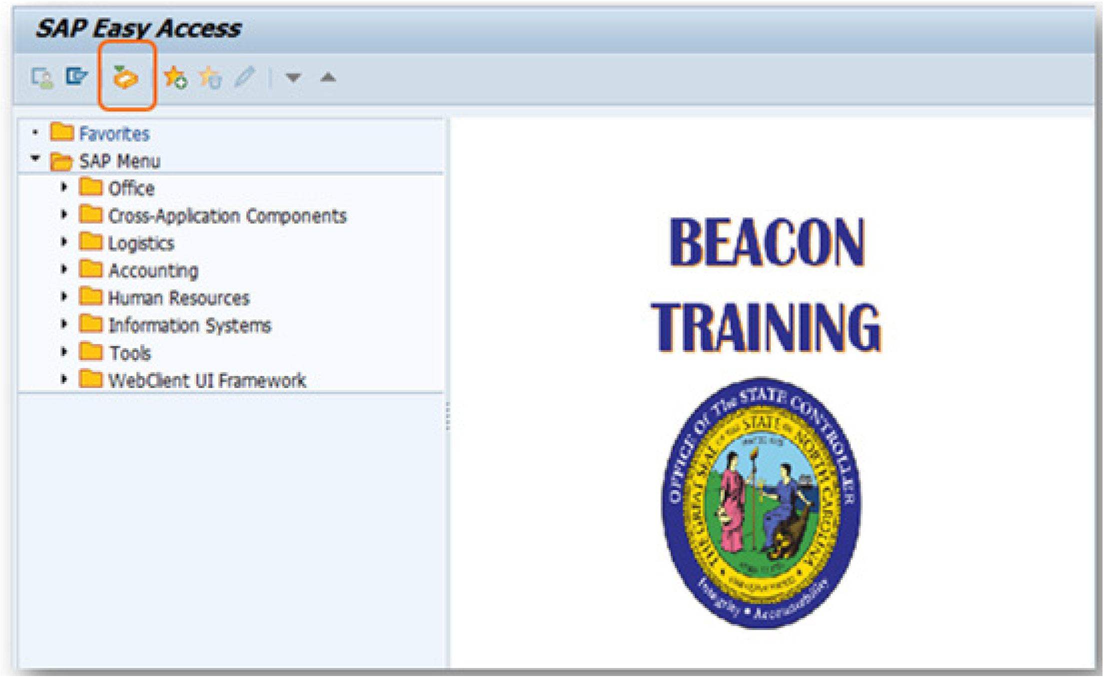
SCENARIO

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

Instructions

You are currently on the SAP Easy Access screen.

Accessing and Navigating the Workflow Inbox (SBWP)

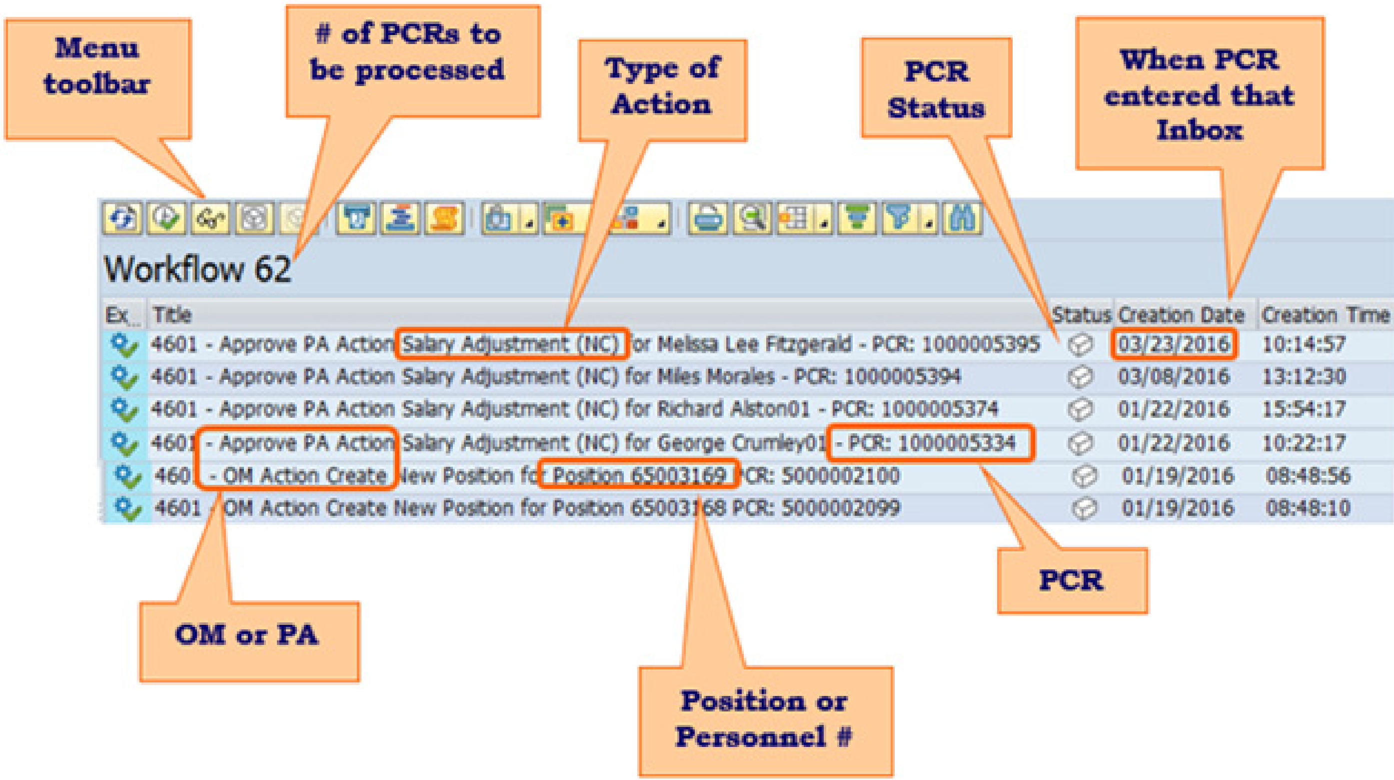


An Approver accesses the Workflow PCRs that have been sent for him or her to take Action on via the Workflow option in the Inbox.

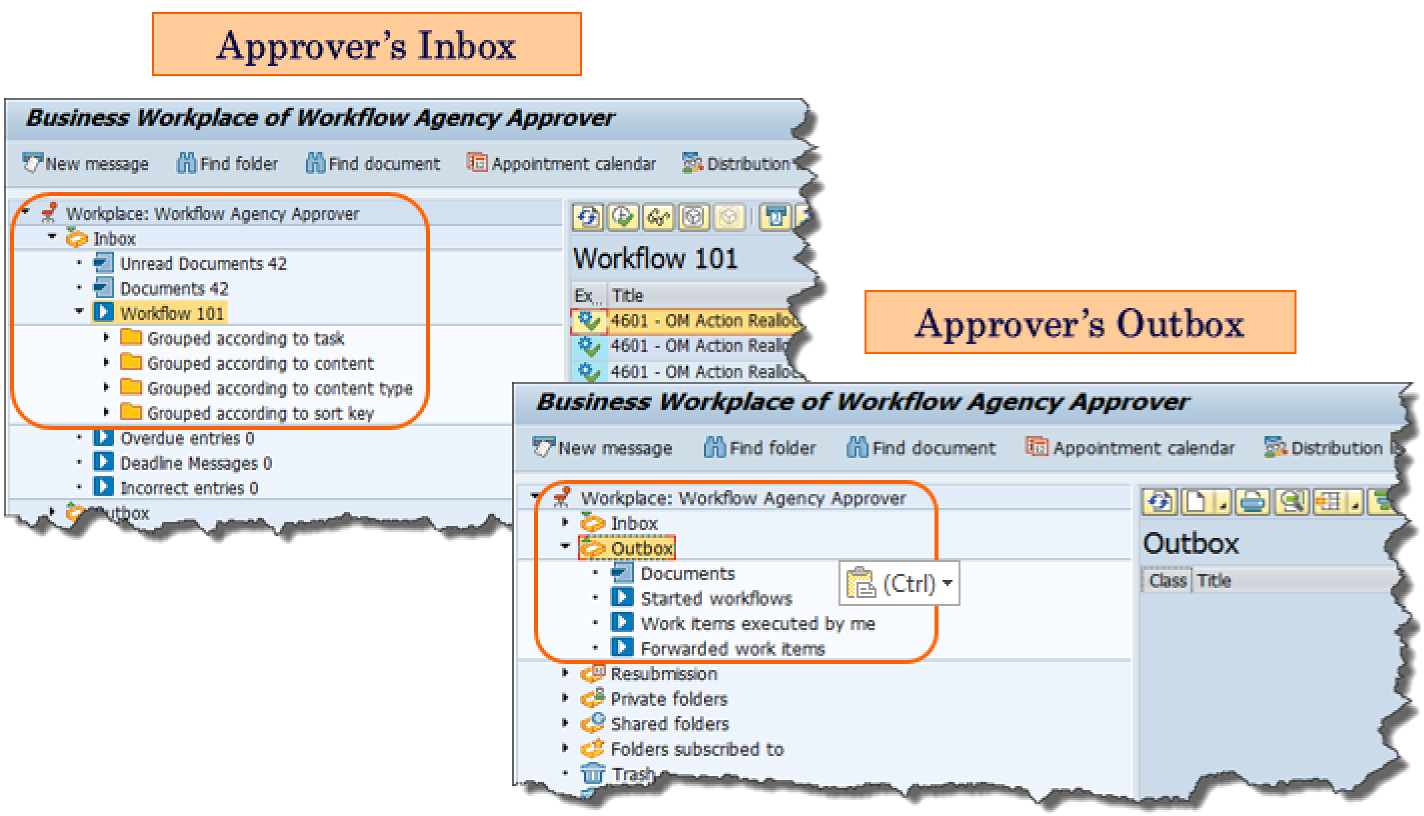
The Inbox is accessed either from the Easy Access screen using the Business Workplace button or by entering SBWP in the Command field.

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

The Workflow Inbox



Options in the Workplace



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

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

INBOX

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

The following Inbox options are not being used:

- Overdue entries
- Deadline Messages
- Incorrect entries

5. Click on the node in front of **Outbox** Outbox.

OUTBOX

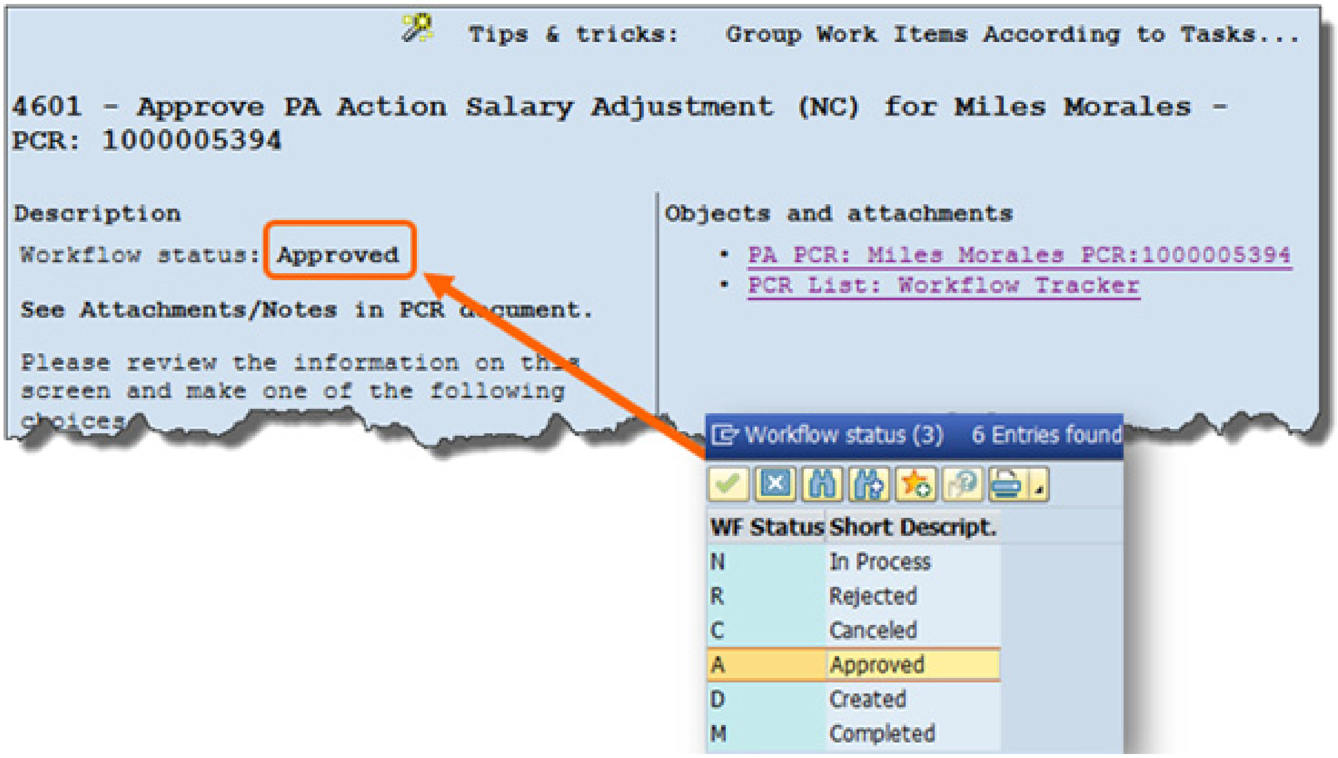
- *Started Workflows*: This folder includes Workflow items for which you were the Initiator.
- *Work items executed by me*: Work Items that you have processed by either approving or returning to the Initiator.
- The *Forwarded work items* Outbox option is not being used.

Workflow Status

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

Ready		The PCR is ready for an Approver to take action.
Reserved		The PCR has been reserved by an Approver which removes the PCR from the Inbox of all other Approvers at that level. The PCR is only displayed in the Workflow inbox of Approver who reserved it.
In process		**In Process** or **Executed**: The PA PCR is awaiting a specific confirmation of its completion which is required. If an Approver has double-clicked a PA PCR and selected the option to *Cancel and keep work item in inbox*, the PCR will reflect the Executed status. This simply means the item has been viewed. When the Approver is ready to take action on a PA PCR with an Executed status, they can double-click on the PA PCR and perform one of the tasks shown displayed in the screen print below. Choose one of the following alternatives Approve change Return to initiator Send to OSHR Cancel and keep work item in inbox
Executed		
Completed		The execution of the PCR is completed and is no longer displayed in the Workflow inbox of the Business Workplace.

Workflow Status - Approved



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

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

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

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

If the initiator cancels the action, the Workflow status will change to **C** for canceled.

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

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

6. Hover over the status “brick.” An electronic “sticky note” will display the status.

7. Listen while your instructor explains the purpose of this button.

   If you double-click a PCR and do not plan to process it, “replace” it by clicking the status brick.

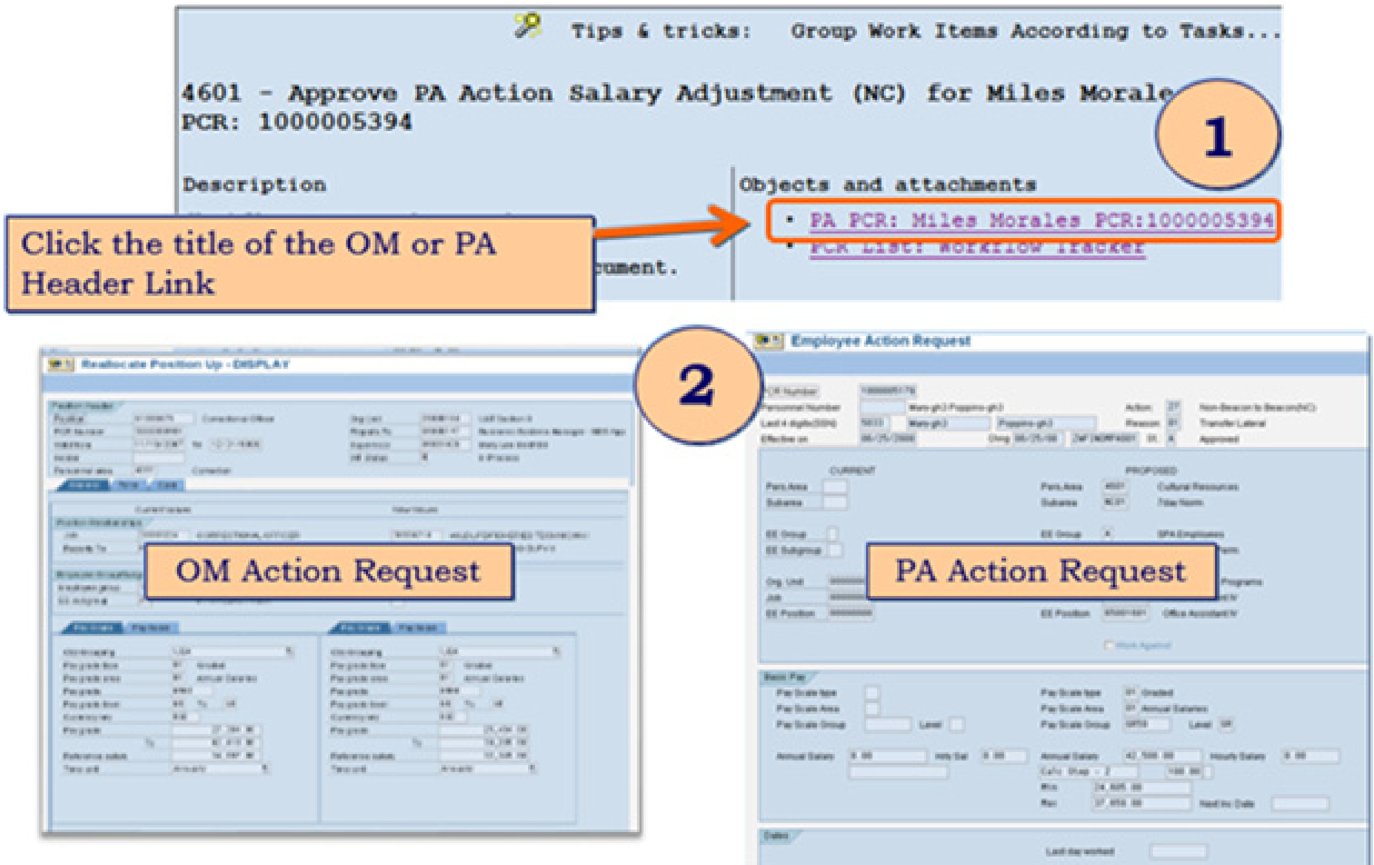
8. Hover over the Salary Adjustment Action PCR for Lynette Rosamond.

   A What is the status of the PCR? ____

Display and Use the Workflow Header

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

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



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

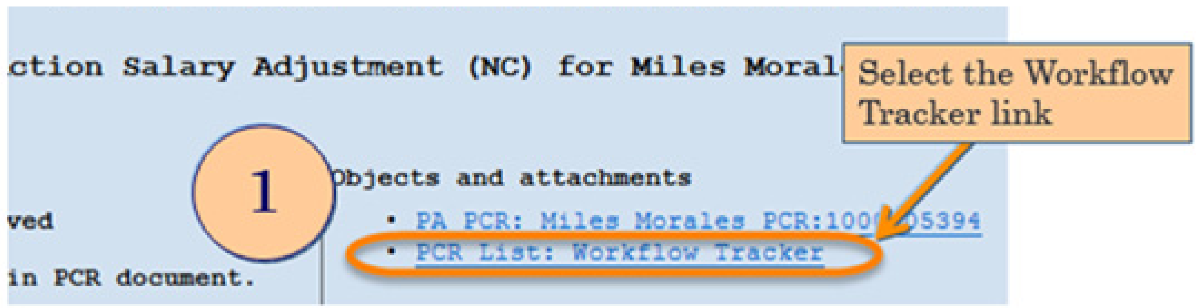
By using the Header, you can also access the Services for Object button to see any notes or attachments that were sent with the PCR.

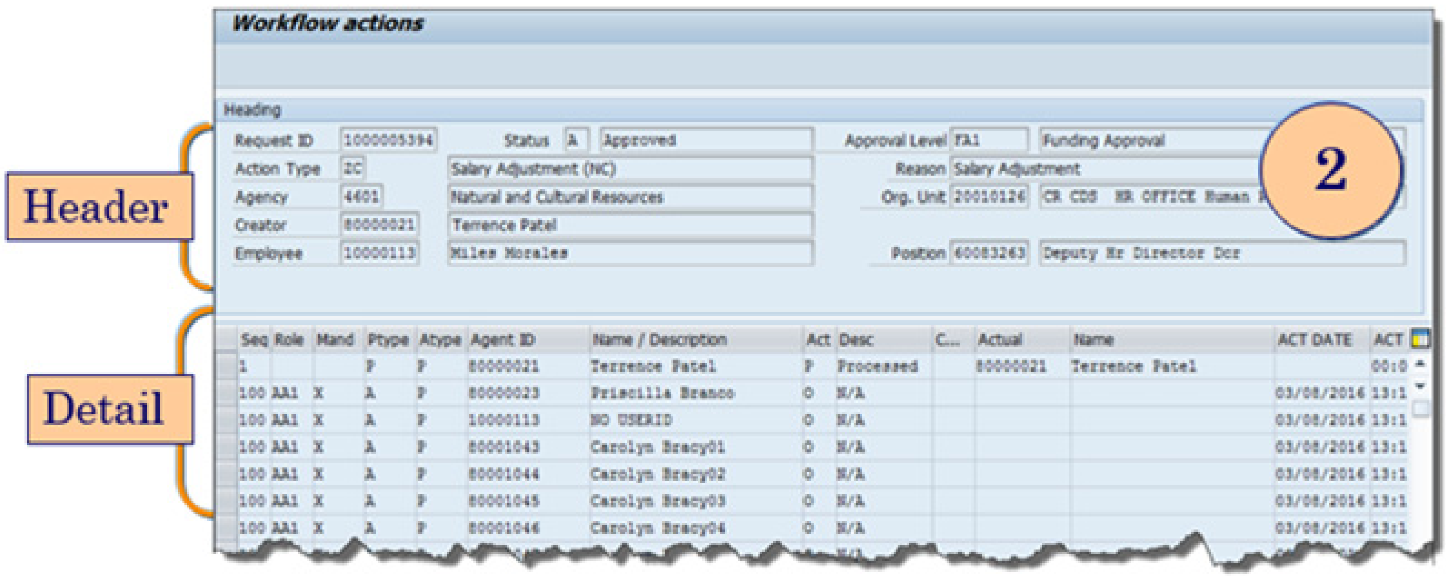
10. Click the **Back** button to return to the Workflow inbox.

Workflow Tracker

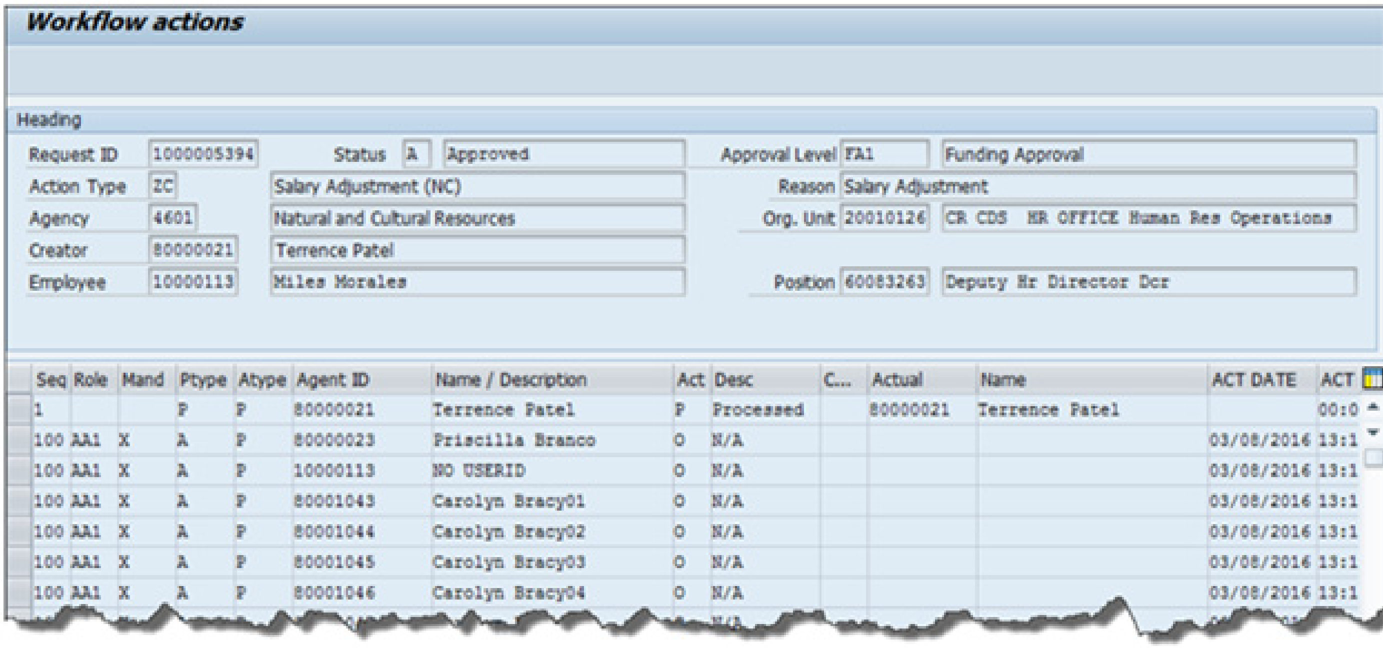
11. SINGLE-click the **PA Action - Salary Adjustment for Miles Morales** (near the top of the PCR list in your Inbox).

12. SINGLE-click the **Workflow Tracker** at the bottom right of the screen. (See example #1 below.)





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



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

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

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

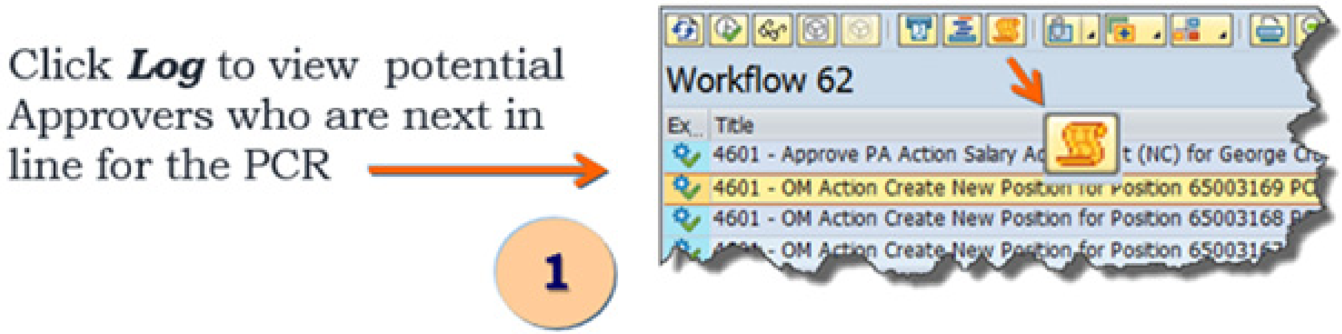
The Detail section of the Tracker will list these attributes:

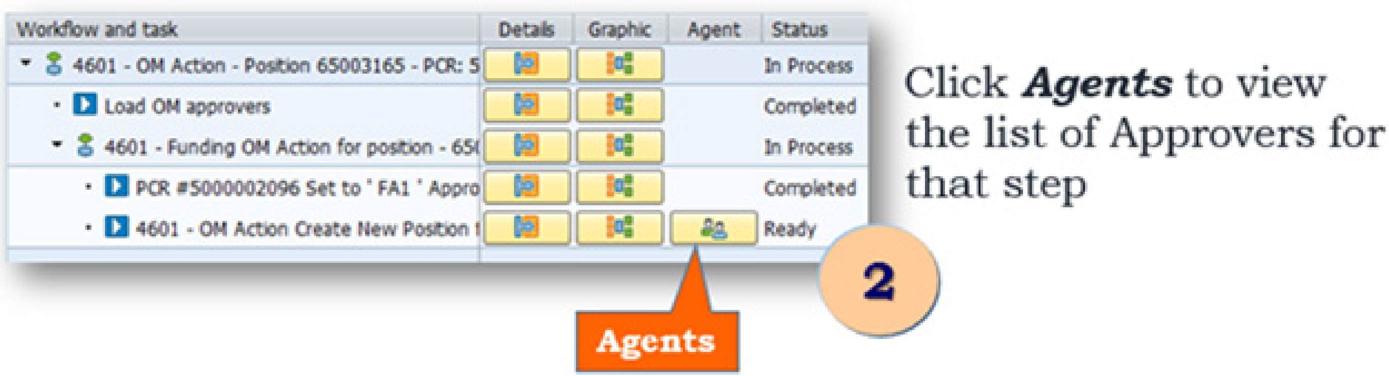
- Sequence (line item sequence)
- Role represents the approver relationship
  - — FA1 Funding Approver
  - — DA1 Division Approver
  - — OA1 OSHR
  - — AA1 Agency Approver
  - — SOM Shared Services
  - — BA1 OSBM
- An X in the Mandatory column indicates that the approval of the specific Approver is required.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

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

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

Display the Workflow Log





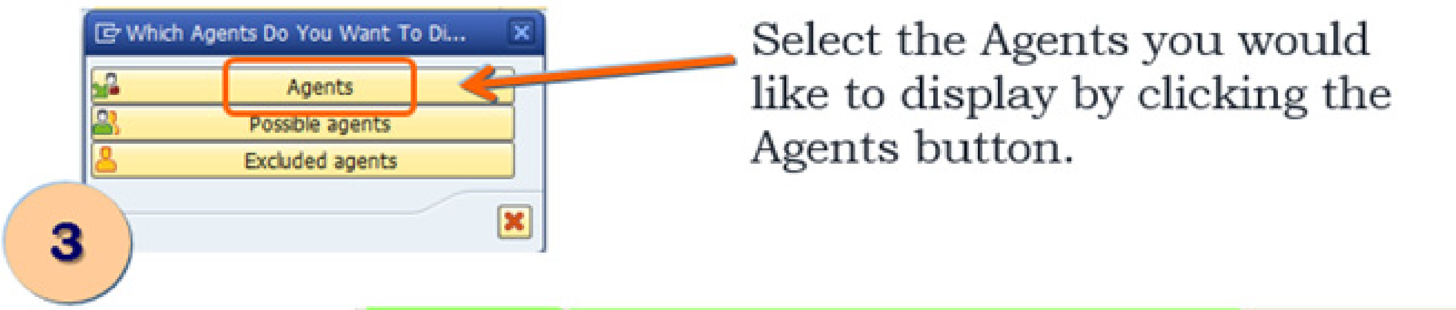
14. SINGLE-click the <u>first</u> Workflow action in your Inbox (should be a *Salary Adjustment for Lynette Rosamond*).

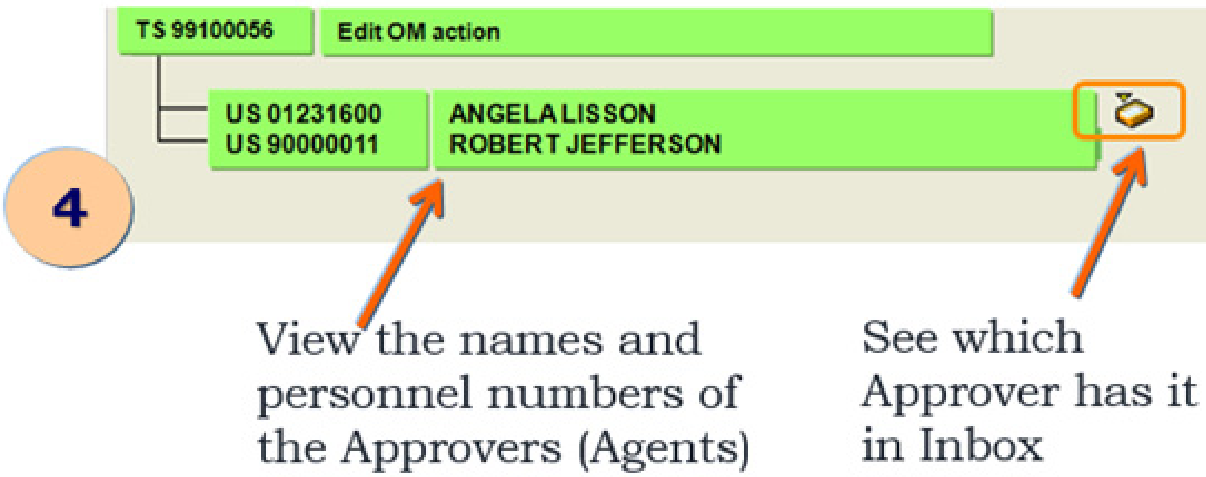
15. Click the **Log** button as identifed above. This will allow you to view potential Approvers who are next in line for the PCR.

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

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

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





16. Click the **Agents** button to view a list of Approvers for the <u>READY</u> status.

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

The Workflow Log illustrated above (note the same as on your screen) indicates that this Work Item has two possible Approvers at this level: Angela Lisson or Robert Jefferson. The list of approvers on your computer screen may look different than the example above.

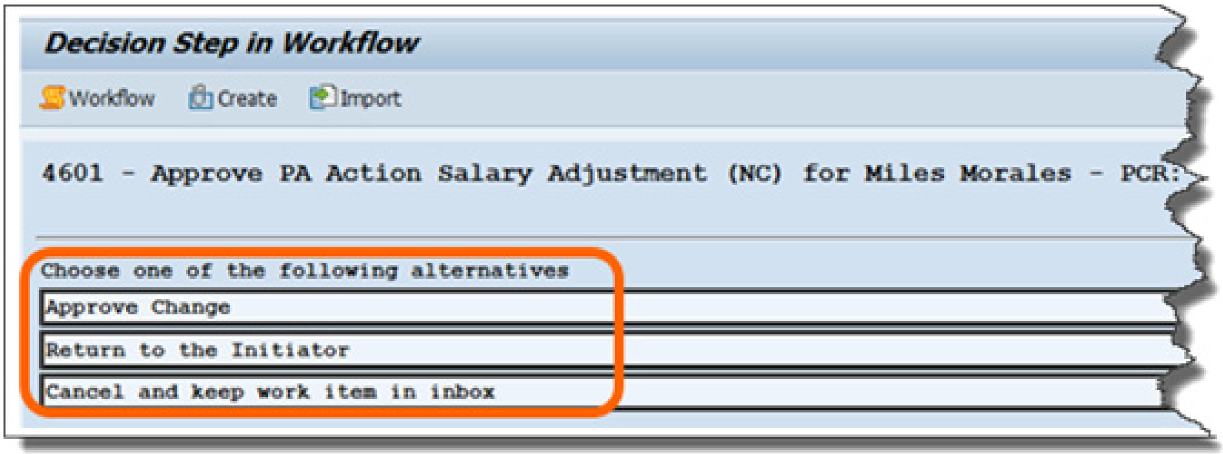
18. Click the **red X** to close the pop-up box.

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

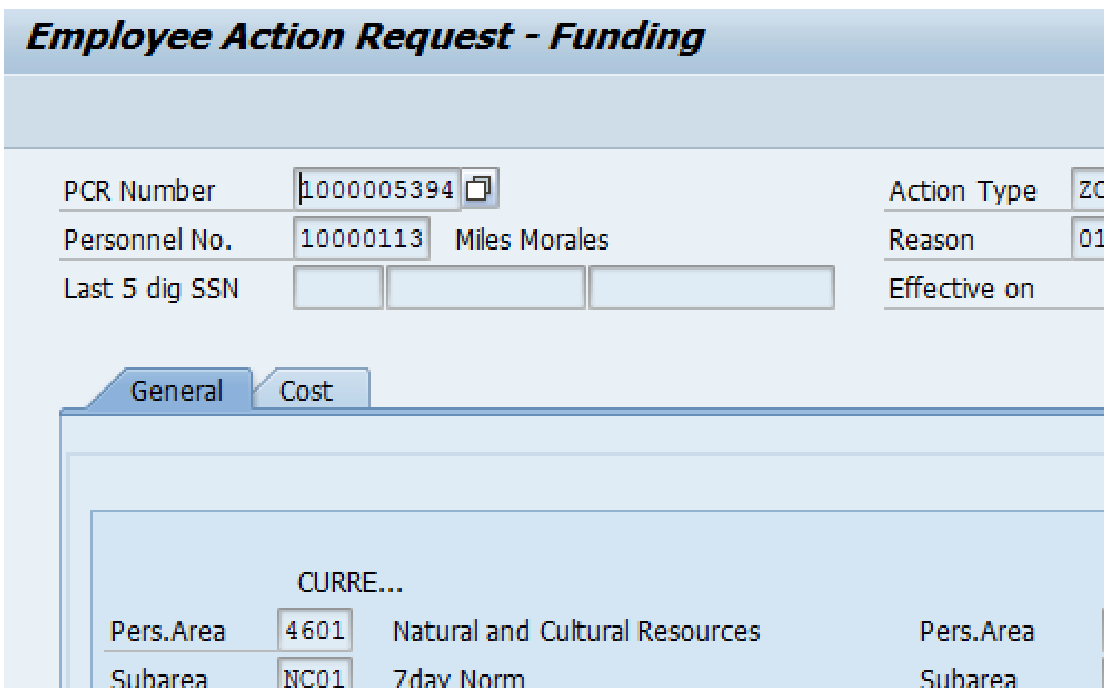
20. Click the **Workflow Tracker** at the bottom right corner of the screen.

Decision Step

21. Watch as your instructor demonstrates the Decision Step.



22. As soon as you click the PCR to open it to take action on it, the PCR Header is displayed.



23. You should check the data on the PCR header and then click the **Back** button.

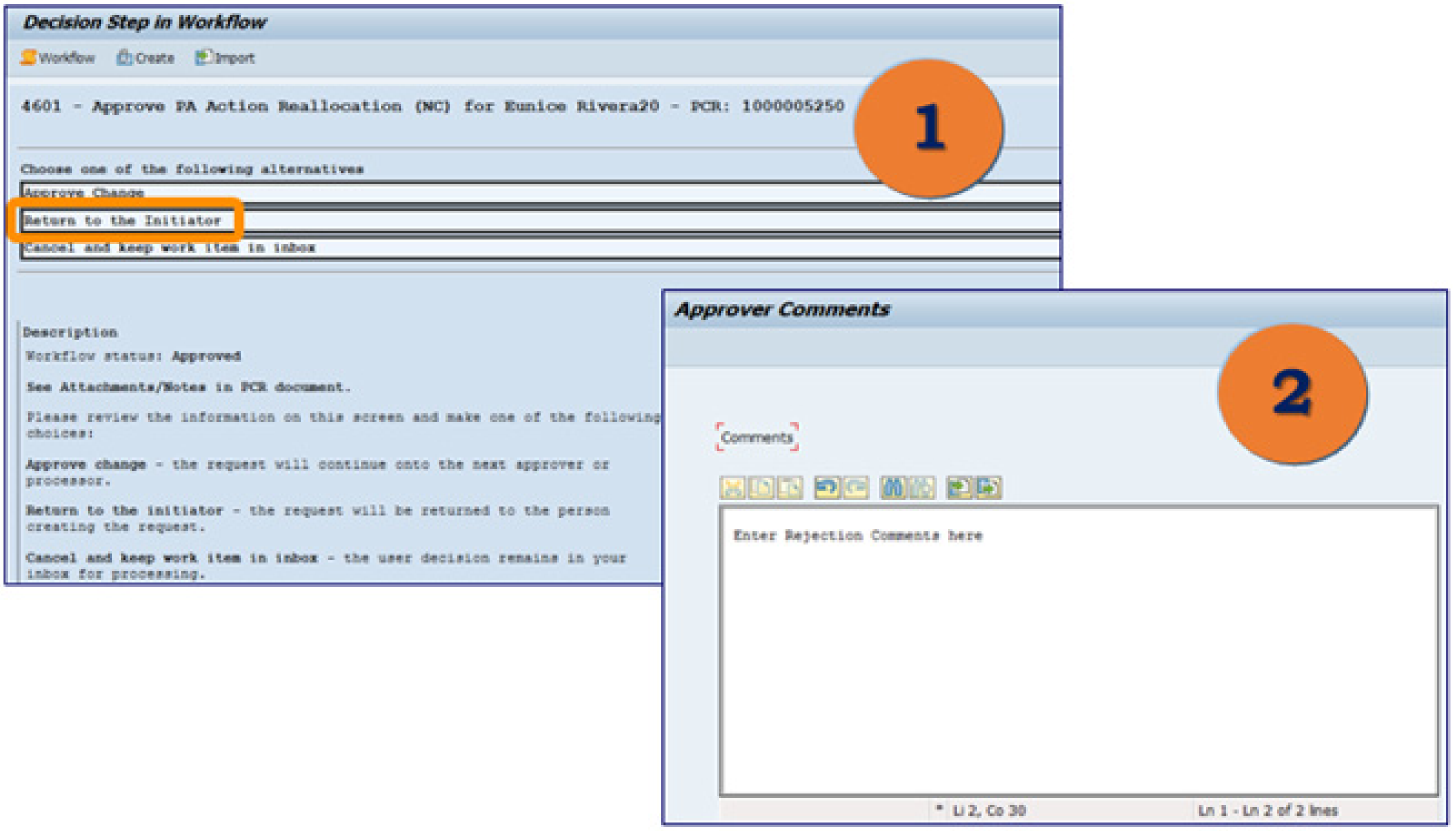
The **Decision Step in Workflow** screen offers the Funding Approver three action options:

24. **LISTEN ONLY (<u>Do not click or process</u>)** as the instructor explains the following features:

- Approve Change - The request will continue to the next approver or processor.
- Return to Initiator - The Request will be returned to the person creating the request.

- Cancel and Keep in Inbox - The user decision remains in the Approver's inbox for processing.

Workflow Status – Return to Initiator (Reject)

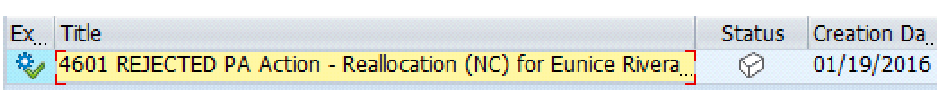


If an Approver clicks the *Return to initiator* option, a comments window automatically displays (this is not the same as the Services for Objects button). The Approver is required to write a note to the Initiator indicating why the PCR was rejected.

🗁 NOTE: The rejected item will not display in the Initiator's Inbox, and the Approver will still see a comments work item in his or her Inbox until the comments are saved.

🗁 NOTE: When creating approver comments, you do not have to click the Enter (green check) button. You only need to click the Save button to save the comments. If you click the green check or press the Enter key and then Save, the comments are lost.

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



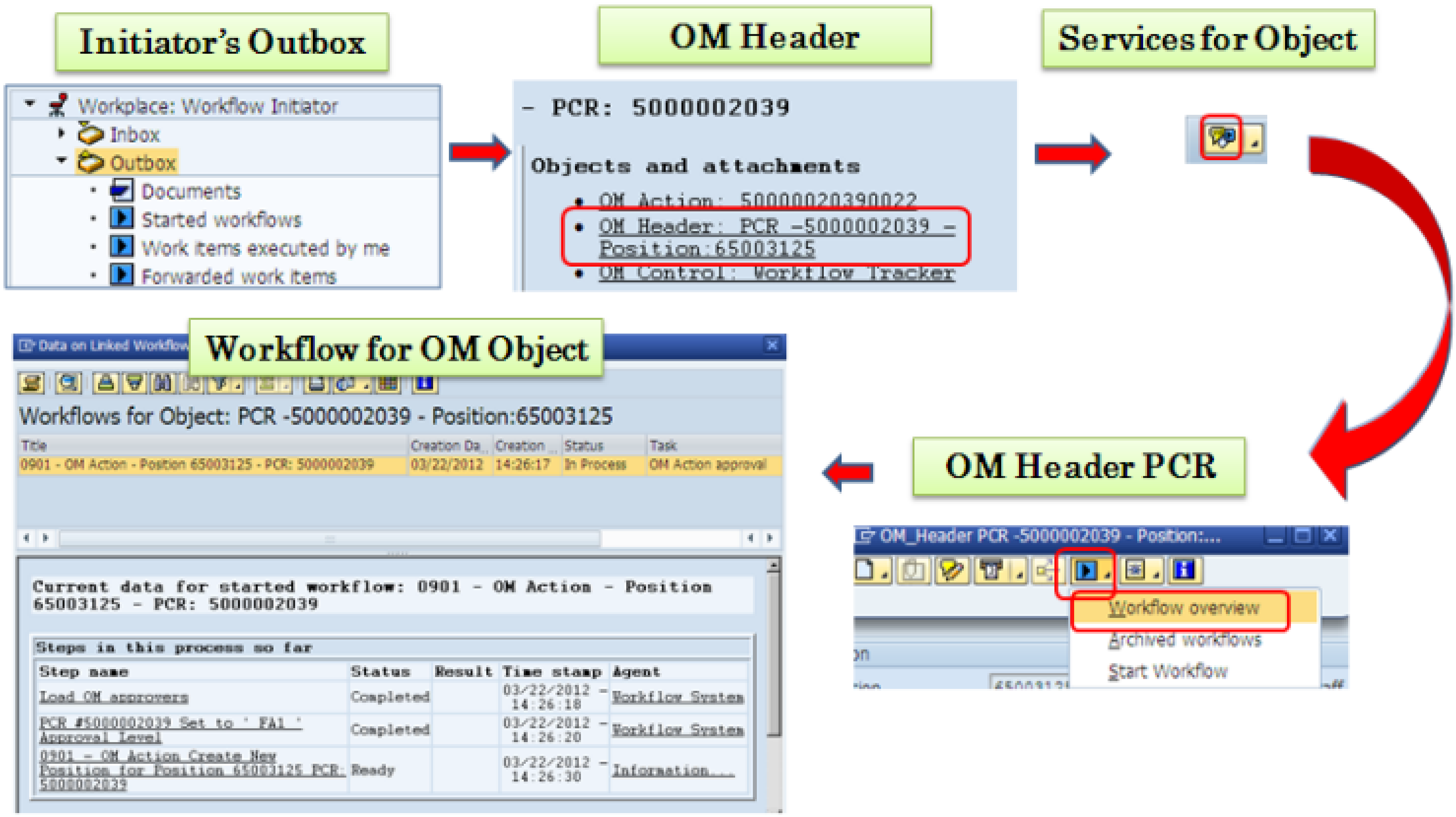
Additional Resource
You can find several additional support materials about OM and PA Workflow on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *Organization Management > Job Aids* • How to Locate an OM PCR *Personnel Administration > Job Aids* • How to Locate a PA PCR *Personnel Administration > Job Aids* • Business Workplace Button Functions

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

This exercise is complete.

* *

OM Workflow Status Overview



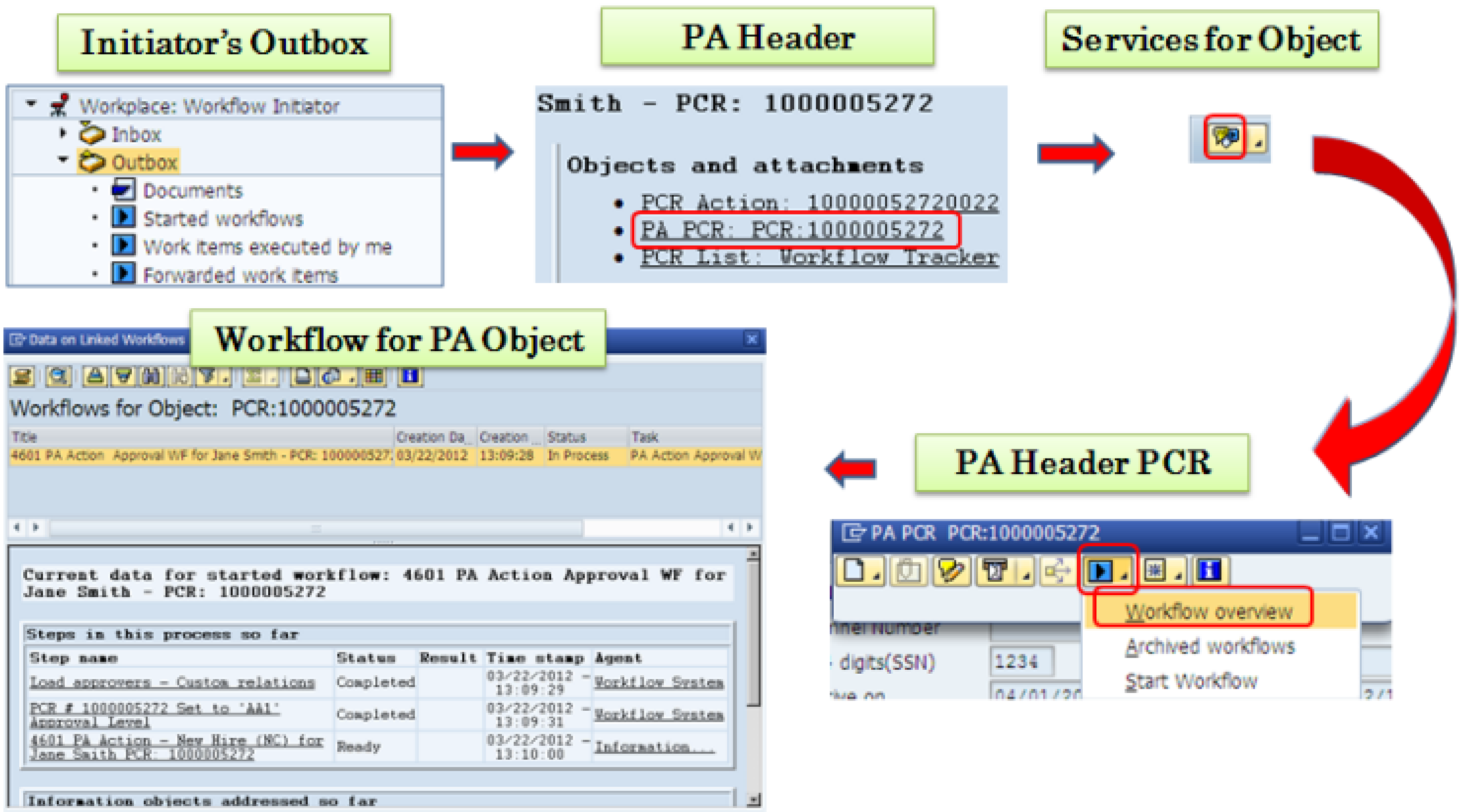
For the initiator, there is an additional way to access the workflow status of an OM PCR.

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

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

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

PA Workflow Status Overview



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

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

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

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

KNOWLEDGE CHECK

Answer	Question
	1. The ___ status is used when an Approver removes the PCR from the Inbox of all other Approvers at that level.
	2. Routing a PCR to the Office of the State Human Resources (OSHR) is not an ___ part of the process.
	3. When an Approver rejects a PCR, they must ___ to the Initiator indicating why the PCR was rejected.
	4. On the Workflow Tracker, an X in the Cmnt column indicates whether a ___ has been created for the Action.
	5. Use the ___ to see which Approver has put the PCR on reserve.
	6. Click the ___ to access the Action screen to view the data entered for the PCR.

SUMMARY

In this lesson, you learned to:

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

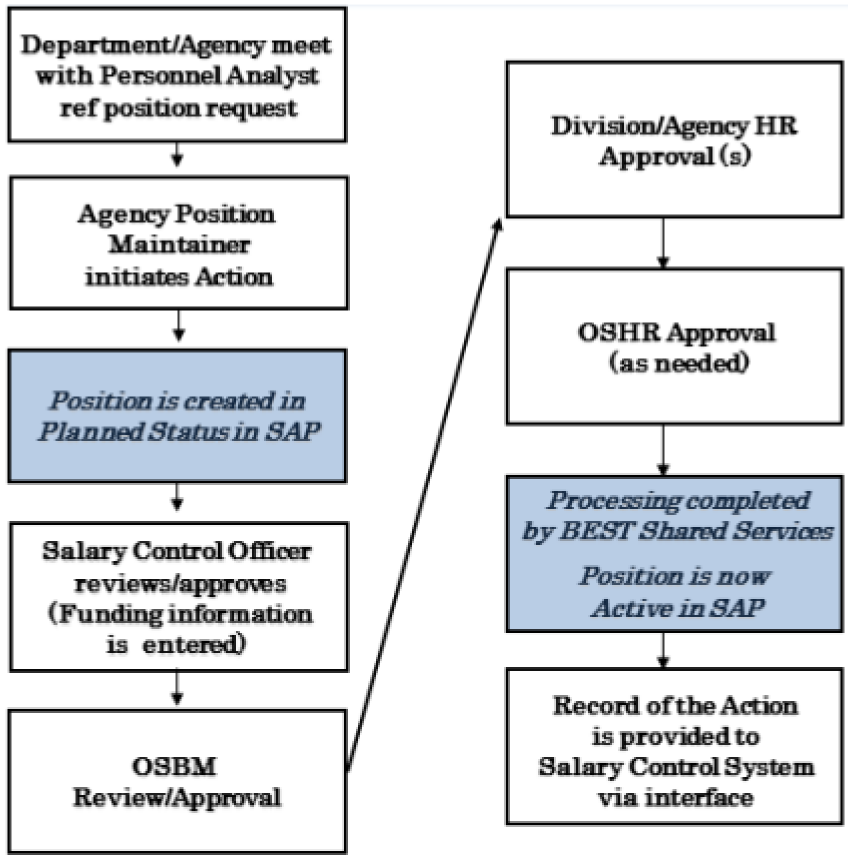
Approving OM & PA Workflow PCRs

Objectives

- Describe the OM Position & PA Workflow processes
- Discuss the routing and processing of OM & PA Workflow Items
- Use the Workflow Log and Tracker
- Approve a new Position
- Remove a PCR from the process
- Approve PA Actions

Organizational Management (OM) Workflow Process Flow

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



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

Roles involved in Position Actions:

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

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

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

OM Routing Table

Action	Action Description
100	Create New Position

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

The New Position OM Action requires OSBM Approval.

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

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

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

These Actions shown above do not require OSBM approval.

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

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

Additional Resource
You can find several additional support materials about Workflow buttons and functions on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *Organization Management > Job Aids* • OM Workflow Routing Process Job Aid • OM Workflow Steps in Approval Process Job Aid

* *

EXERCISE 5.1: Reserve a Position Creation PCR

SCENARIO

You have received a PCR requesting the addition of a new position (Special Assistant to Div Director). When you review the PCR and the accompanying note, you feel you need to do additional reserach before acting on the it. Use the Reserve function to remove it from Workflow until you complete your research.

Instructions

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

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

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

3. Single-click **Workflow**. The PCRs that have been sent for approval are listed in the right column.

4. Click to update the screen. This ensures that the most current PCRs that have been sent to the Inbox display.

5. Click <u>one time</u> (do not double-click) the **applicable PCR** below as assigned to you by your instructor:

PCR #: *OM Action - Position #*							
A	5000002101	F	5000002106	K	5000002111	P	5000002116
B	5000002102	G	5000002107	L	5000002112	Q	5000002117
C	5000002103	H	5000002108	M	5000002113	R	5000002118
D	5000002104	I	5000002109	N	5000002114	Inst 1	5000002119
E	5000002105	J	5000002110	O	5000002115	Inst 2	5000002120

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

7. Review the information. Observe that you can view the information but cannot make any changes to the data.

8. Click the **Services for Object** button to review any notes that were entered by the Initiator.

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

9. Select **Attachment List**. The Services: Attachment list pop-up is displayed.

10. Highlight the line item for the note, and click the **Display** button . The Display note pop-up displays with the note title and note information.

11. Click to close the Display note pop-up.

12. Close the *Service: Attachment* list pop-up. If necessary, close the Services for Object menu.

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

14. With the applicable PCR selected, click the **Reserve** button . You have now taken ownership of the workflow item and removed it from the general Inbox of the other Funding Approvers. Observe that the icon for Reserve is now grayed out and the new icon (Replace) is active. You will use Replace when you are ready to put the PCR back into the group of Agents again. At this time, you decide that you still have more research to do, and so you are not ready to put the PCR back into Workflow.

15. Exit the Workflow Log back to the Easy Access screen.

This exercise is complete.

* *

EXERCISE 5.2: Replacing a Position Creation PCR

SCENARIO
You have researched the PCR requesting the addition of a new position (Special Assistant to Div Director). You need to restore (replace) it to the Inbox.

Instructions

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

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

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

3. Single-click **Workflow**. The PCRs that have been sent for approval are listed in the right column.

4. Click to update the screen. This ensures that the most current PCRs that have been sent to the Inbox display.

5. Click <u>one time</u> (do not double-click) the **applicable PCR** below as assigned to you by your instructor:

PCR #: *OM Action - Position #*							
A	5000002101	F	5000002106	K	5000002111	P	5000002116
B	5000002102	G	5000002107	L	5000002112	Q	5000002117
C	5000002103	H	5000002108	M	5000002113	R	5000002118
D	5000002104	I	5000002109	N	5000002114	Inst 1	5000002119
E	5000002105	J	5000002110	O	5000002115	Inst 2	5000002120

6. The applicable PCR now has a “brick” that indicates it is **Reserved**. . To unreserve the PCR and restore it to the inbox, click the **Replace** button . You have now put the PCR back into the group of Agents again. The PCR is ready to be Approved.

This exercise is complete.

* *

EXERCISE 5.3: Approving a New Position PCR

SCENARIO

The PCR you just replaced in the Workflow Inbox for all agents is now ready for you to approve. You need to add the cost distribution information and approve the PCR.

Instructions

You are currently in your Funding Approver Workflow Inbox.

1. Click to update the screen. This ensures that the most current PCRs that have been sent to the Inbox display.

2. Make sure the PCR you wish to approve is selected. If it is not selected, single-click **Workflow**.

PCR #: *OM Action - Position #*							
A	5000002101	F	5000002106	K	5000002111	P	5000002116
B	5000002102	G	5000002107	L	5000002112	Q	5000002117
C	5000002103	H	5000002108	M	5000002113	R	5000002118
D	5000002104	I	5000002109	N	5000002114	Inst 1	5000002119
E	5000002105	J	5000002110	O	5000002115	Inst 2	5000002120

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

4. Click the **Cost** tab to make it active.

5. Click the Create / Update button. The screen is now active for data entry.

6. Enter the following data on the first line of the Cost distribution section.

   - Cost Center = **4610000000**
   - Order = **100000005371**
   - Pct = **100**
   - Fund = **461210005**

7. Click or press **Enter**. The Budget Distribution screen is displayed.

8. Enter **36,100** in the Total Budgeted Amt field.

9. Enter **100** for new position in the Action/Reason code field if it does not default.

10. Click the green check button at the bottom of the screen.

11. Click the **Save** button. The Cost tab displays again.

12. Click the **Back** button. An action pop-up box is displayed.

13. Click the Complete Work Item button. The Decision step screen displays.

14. Click the Approve change button.

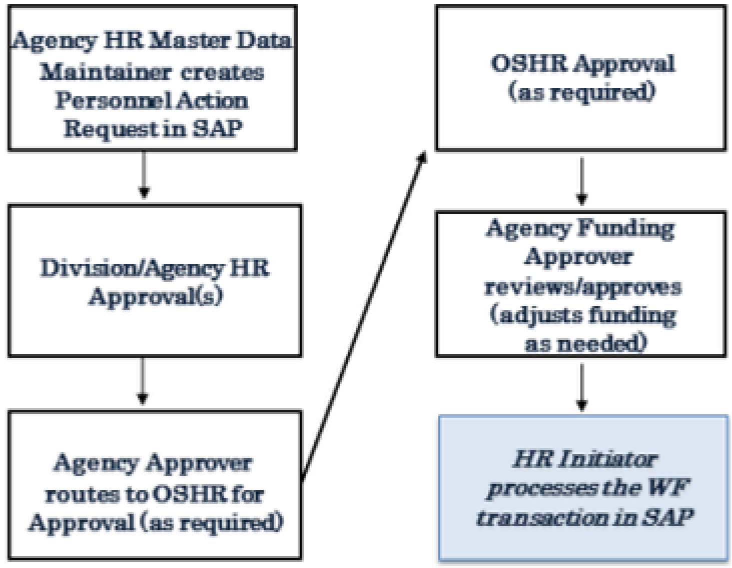
This exercise is complete.

* *

KNOWLEDGE CHECK

Answer	Question
	1. ___ approval is not required for temporary positions.
	2. When the Workflow item is saved, the HR/Payroll system assigns a ___.
	3. The ___ Approver enters Cost information and budgeted salary.
	4. The *Cancel and keep the work item in inbox* option does not ___ the PCR.

Personnel Administration (PA) Workflow Process Flow

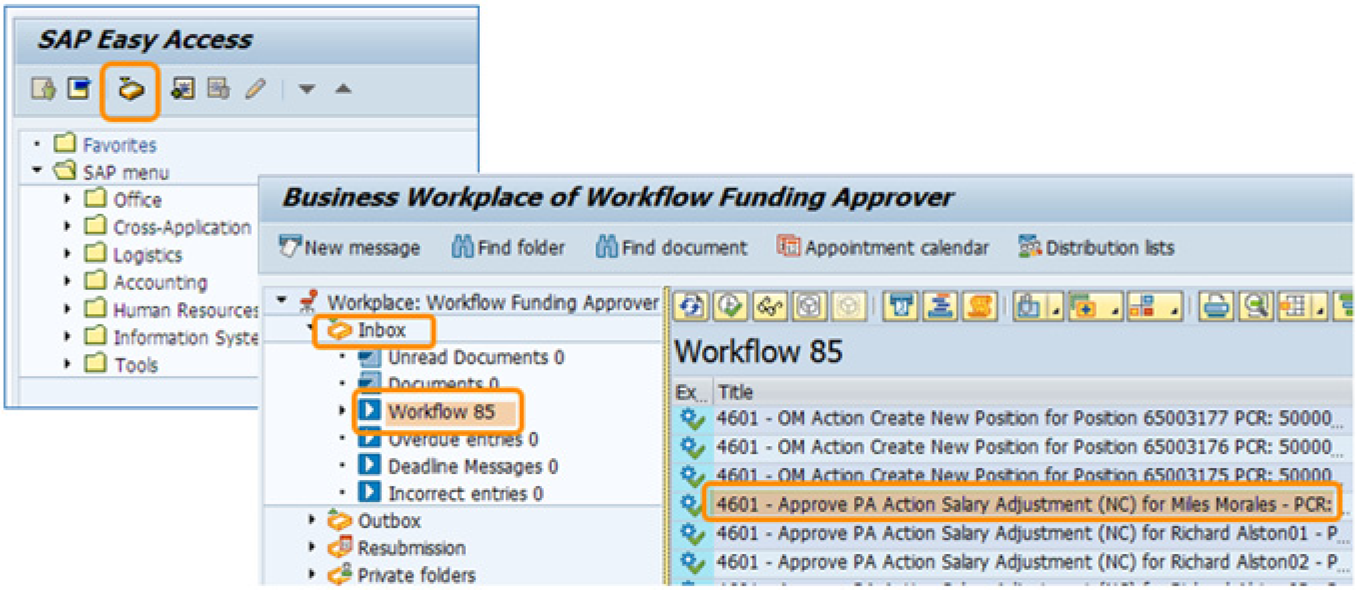


The PA action is not complete until the PCR has been approved and processed by the Initiator. The Workflow PCR is simply a form to collect some of the basic information for approval purposes before the Personnel Action is processed (and the employee's personnel file is updated). When the approval process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

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

Additional Resource
You can find several additional support materials about Workflow buttons and functions on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *Personnel Administration > Job Aids* • Business Workplace Button Functions • Business Workplace Overview Tree Functions

Approving PA Actions via the Inbox (SBWP)



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

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

* *

EXERCISE 5.4: Approve a Salary Adjustment PCR

SCENARIO

The first of next month the Civil War Roster Branch Supervisor for the History Civil War division of the Department of Natural and Cultural Resources, George Crumley, will receive a salary adjustment due to assuming Lead worker responsibilities. His salary will change from $45,500 to $55,500, yet remain within pay grade GR72.

You have received a PCR in your inbox requesting approval and a change in the budget to support the salary change.

Instructions

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

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

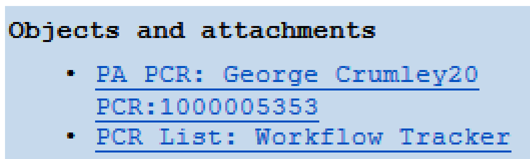
3. Double-click the **Workflow** sub-folder. The PCRs that have been sent to you for approval are listed in the right column.

4. Listen as your instructor assigns you a PCR from the table below to process for this exercise.

PCR #: Salary Adjustment: *George Crumley*							
A	1000005334	F	1000005339	K	1000005344	P	1000005349
B	1000005335	G	1000005340	L	1000005345	Q	1000005350
C	1000005336	H	1000005341	M	1000005346	R	1000005351
D	1000005337	I	1000005342	N	1000005347	Inst 1	1000005352
E	1000005338	J	1000005343	O	1000005348	Inst 2	1000005353

5. Locate the PCR you have been assigned in the list of PCRs.

6. SINGLE-click on it to activate it. The information at the bottom of the screen will change to depict your PCR's information.



7. Follow along as your instructor guides you through the Workflow Header and Tracker.

8. When you have completed your information discovery process, click the **Back** button to return to the Workflow screen.

9. With the applicable PCR still highlighted, click the **Execute** button (or double-click the PCR line item). The Employee Action Request - Funding screen is displayed.

10. Review the **General** tab for accuracy.

11. Click the **Cost** tab and review the current funding information for accuracy. Note that on this screen, all of the fields are grayed out. You cannot make changes.

12. Click the **Back** button to return to the Decision Step in Workflow.

13. Click the **Approve Change** Approve change button. The PCR is approved. You are returned to the Workflow inbox.

14. Click the Refresh button to update your Inbox.

NOTE: Note that, because others in the class have approved PCRs, the number following "Workflow" at the top of the PCR list has decreased.

This exercise is complete.

* *

Rejecting a PCR

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

EXERCISE 5.5: Reject a Salary Adjustment PCR

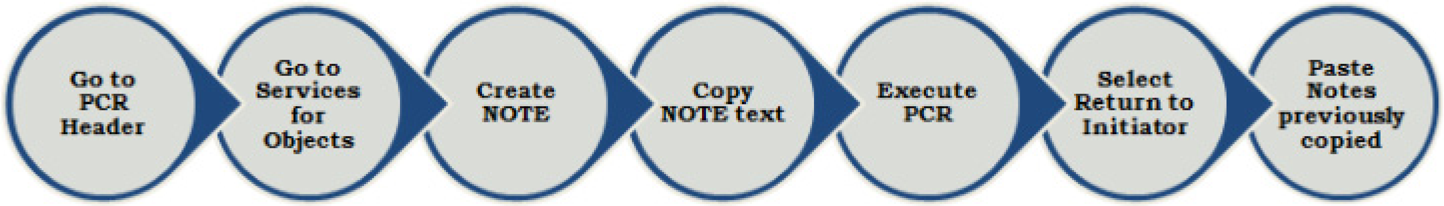
SCENARIO
A PCR is in your Workflow Inbox for a Salary Adjustment for Michelle Salazar. She will be assuming her Supervisor's role while he is out on Leave of Absence. The salary request is well over the 10% allowed by OSHR policy. You need to reject this PCR and return it to the Initiator with instructions to reduce the salary increase request to no greater than the 10% allowed by OSHR policy.

Rejecting PCRs

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

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

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



Instructions

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

PCR #: S*alary Adjustment: Michelle Salazar*									
A	1000005397	F	1000005402	K	1000005407	P	1000005412
B	1000005398	G	1000005403	L	1000005408	Q	1000005413
C	1000005399	H	1000005404	M	1000005409	R	1000005414
D	1000005400	I	1000005405	N	1000005410	Inst 1	1000005415
E	1000005401	J	1000005406	O	1000005411	Inst 2	1000005416

3. Open the PCR to review by SINGLE-clicking the **PCR Header** in the lower right-hand corner of the screen.
4. Access the **Attachment list** on Services for Objects and double-click on the note to read the comments from the Initiator.
5. Close the comments pop-up box.
6. While still in the Attachment list, click on the **New > Create note** button.
7. Enter the title of your note as **Rejection Comments**.
8. Enter your rejection comments in the text box below the title.
9. <u>Before</u> you click the **green check** button, copy those notes.
10. Now, click the **green check** button. You are again on the Services for Objects attachment list.
11. Click the **green check** button.
12. Click the **green back arrow** to return to the PCR list in Workflow screen.
13. Make sure your PCR is still selected (highlighted).
14. Open the PCR by either double-clicking on the selected PCR or clicking the **Execute (F8)**  button.

15. Click the **Return to the Initiator** option. An Approver Comments dialog box opens on the screen.

16. Paste the text you copied in step 8 in the text box in the Approver Comments box.

17. Click **Save**. A pop-up box displays indicating that the approver comments have been saved.

    - REMEMBER...after entering the rejection note, <u>do not click the Green Check mark first</u>.

18. Click the **green check** to close the pop-up box.

19. Click the **Back** button to return to the Inbox.

20. Click the **Update** button to refresh the Inbox.

21. On the SAP Business Workplace, click the **Outbox**.

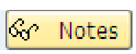
22. SINGLE-click **Workflow items executed by me**. The PCRs on which you have taken action (approved or returned) are listed in the right column.

23. In the Inbox, SINGLE-click the **PCR** you just rejected.

24. At the bottom right-hand area of the screen, SINGLE-click the **PCR List: Workflow Tracker**. The Workflow actions screen is displayed.

25. Locate the **X** mark under the Comments column.

26. Select that line by **clicking on the box** to the left at the beginning of the line.

27. Click the **Notes** 

button at the bottom left-hand corner. A comment box is displayed with the Approver's rejection comments.

28. Click the **Back** button to return to the Workflow actions screen.

29. Click the **Back** button again to return to the SAP Business Workplace screen.

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

This exercise is complete.

* *

<u>*KNOWLEDGE CHECK*</u>

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

SUMMARY

In this lesson, you learned to:

- Describe the OM Position & PA Workflow processes
- Discuss the routing and processing of OM & PA Workflow Items
- Use the Workflow Log and Tracker
- Approve a new Position
- Remove a PCR from the process
- Approve PA Actions

Workflow Reporting & Troubleshooting

Objectives

- Access and execute the Workflow Report for OM
- Change the layout of the report
- Create a variant for the report
- Retrieve a report variant
- Modify funding for a position

Workflow Report Overview

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

- Type of Actions and reasons created in the Agency
- Actions that are awaiting approval and at which approval level
- Length of time an approval has been waiting
- Transaction codes:
  - ZOM0178 (OM reports)
  - ZOMWFMON (OM Workflow Process Monitoring)
- Reports can be run based on security by:
  - Agency
  - Groups
  - Individual PCR
- The **Workflow Report Job Aid** is located in both the OM and PA folder on the OSC Training HELP website. Access the job aid online at: http://www.osc.nc.gov/training/osctd/help/

  Locate the Job Aids sub-folder. You will find the Job Aid there.

Searching for PCRs

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

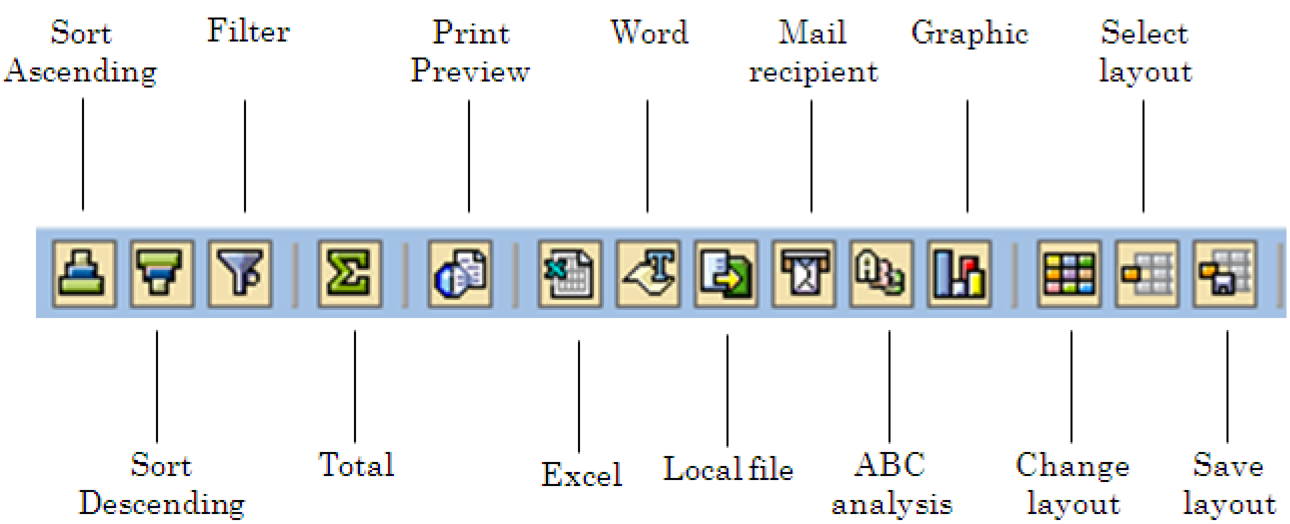
PA

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

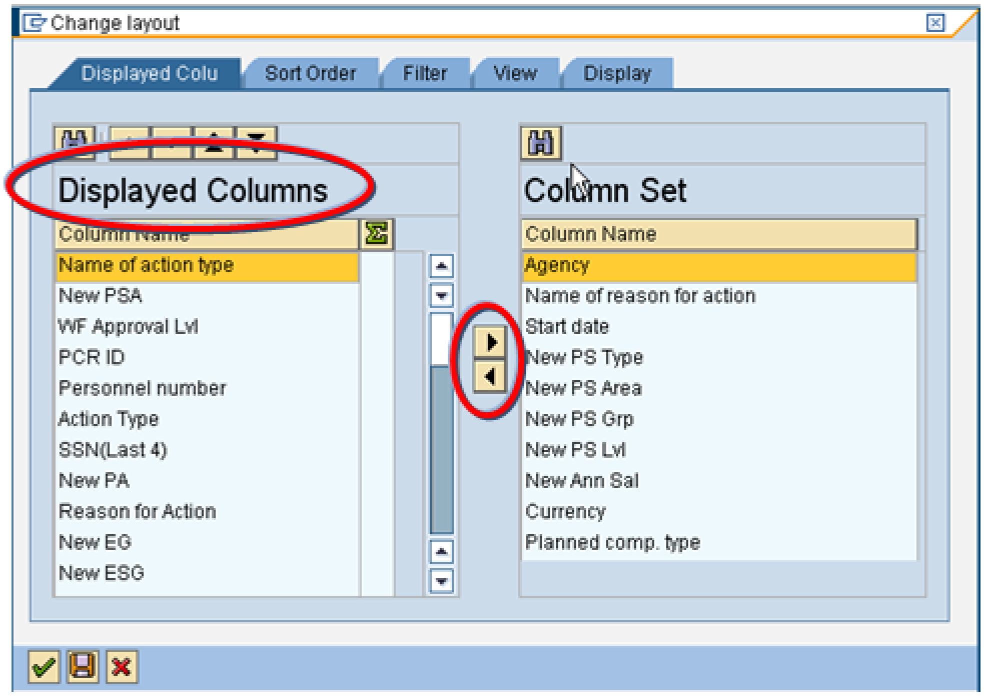
OM

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

Report Options



Modify Layout



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

Save Layout

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

Use a Layout

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

- - OR - -

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

PCR Troubleshooting

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

1. If the Initiator merely saved the PCR and did not click the Initiate Workflow button, the PCR is not visible in their outbox. Therefore an Approver who is waiting to see the PCR in the Approver Inbox will not be able to see it in their inbox. The Initiator may choose edit in either ZOMA069 (OM) or ZPAA076 (PA).
2. The Initiator or Approver has incorrect security roles to process a PCR.
3. If a user is an Initiator as well as an Approver, it can sometimes be confusing. That is because the same PCR will leave the Inbox of the Initiator role and be sent to the Inbox of the Approver role (which to the employee is the same Inbox).
4. In PA, the Initiator has to click a "Completed Workflow Item" button when the personnel action has been processed. In some cases, the Initiator may have inadvertently clicked the button prematurely after backing out of an Action without processing all infotypes.
5. If a PCR/workflow item is "touched" more than 20 times or too quickly by an approver, it can disappear from the workflow process automatically. Contact BEST Shared Services to confirm. A new PCR may need to be created.

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

EXERCISE 6.1: Execute the Workflow Report (PA)

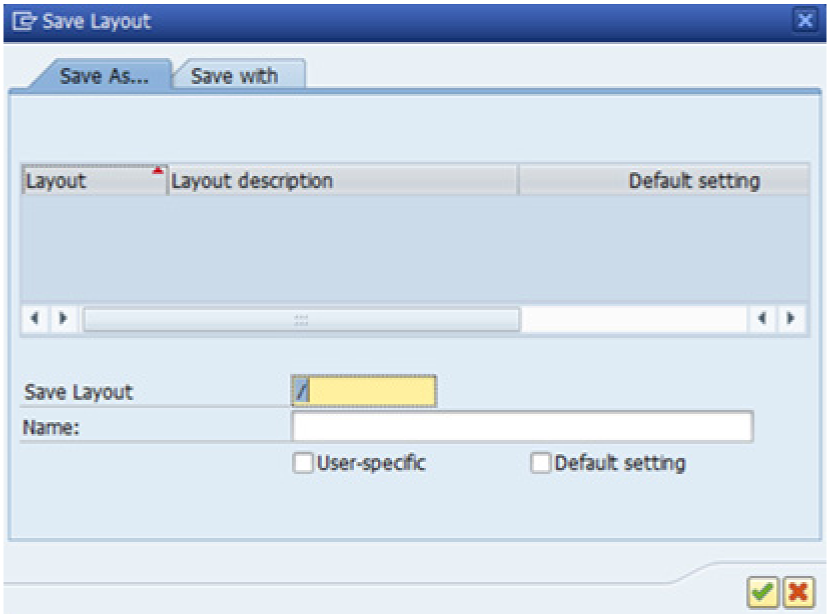
SCENARIO
You need to see if there are any Create New Position and Reallocate Actions awaiting approval for the Natural & Cultural Resources Personnel Area. In addition, you want to change and save the layout to your specifications.
NOTE: For PA Actions use transaction code ZPA0189; for OM use ZOM0178.

Instructions

1. From the Easy Access screen, enter **ZOM0178** into the Command Field.
2. **Enter**.
3. In the Action field, enter the Action codes for **Create New Position (100)** to **Reallocations (107)**.
4. In the Personnel Area field, use the matchcode to select **Natural & Cultural Resources (4601)**.
5. **Enter** and **Execute**.
6. Click the **Change Layout** button and move items on the left Columns Displayed panel to the Column Set on the right until only those in the list below are visible in the Columns Displayed:
   - Action text
   - WF Approval Lvl
   - WF Status
   - Position Title
   - Effective Date
   - PCR ID
   - Action
   - Position Number
7. Click the **green check** to close the Change Layout pop-up.
8. Assume you have decided to move the order of the columns. Drag and drop the columns so that they display left to right as shown below:
   - PCR ID
   - Position Number
   - Action text
   - Action
   - WF Status
   - WF Approval Lvl

- Position Title
- Effective Date

9. Click the **Save Layout**  button.



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

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

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

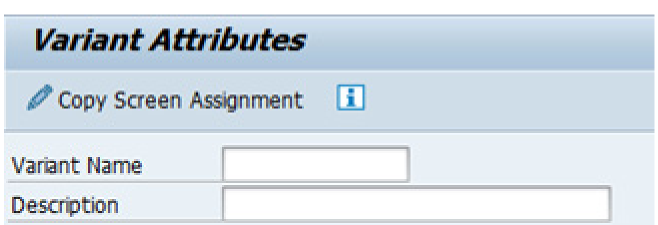
12. Click the **User-specific** checkbox. This indicates that the layout is restricted to your user ID. If you do not select User-specific, the layout can be used and modified by anyone with the security to run the report.

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

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

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

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



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

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

18. **Save** your variant.

    The next time you need to use a Variant:

    - Click the **Get Variant** button or select menu path Goto > Variants > Get.
    - In the pop-up box, double-click desired **Variant** to select.
    - The system will populate your report with the fields you set up when you created the variant.
    - **Modify** and **enter data** as needed prior to executing the report.

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

This exercise is complete.

* *

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

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

1. From the Easy Access screen, enter **ZOM0178** into the Command Field.
2. In the Action Type fields, enter **100** in the first Action field Create New Position.
3. In the Personnel Area field, use the matchcode to select **Natural & Cultural Resources**.
4. Click in the **ALV** variant field and select the layout you previously saved.
5. **Enter** and **Execute**. The report should display with the same layout as in the previous exercise.

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

This exercise is complete.

* *

Additional Resources
You can find several additional support materials about Workflow buttons, functions, and reports on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *Organization Management > Job Aids* • Business Workplace Button Functions • How to Locate an OM PCR • OM Business Workplace Dynamic Columns & Layouts • Business Workplace Overview Tree Functions • OM Workflow Inbox • OM Workflow Routing Process • OM Workflow Steps in Approval Process *Personnel Administration > Job Aids* • Business Workplace Button Functions • How to Cancel a PCR • How to Locate a PA PCR • PA Business Workplace Dynamic Columns & Layouts • PA Business Workplace Overview Tree Functions • PA Workflow Inbox • PA Workflow Routing Process • PA Workflow Steps in Approval Process

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SUMMARY

In this lesson, you learned to:

- Execute the Workflow Report
  - Access and execute the Workflow Report for OM
  - Change the layout of the report
  - Create a variant for the report
  - Retrieve a report variant
  - Modify funding for a position

Course Review

Objectives

- Explain the NCAS budget information and how it is connected to BEACON.
- Enter Cost Distribution using the PO13 - Maintain Position transaction.
- Identify key differences in the routing of Workflow (WF) Items in OM and PA
- Access, navigate and complete items within the Workflow Inbox
- Approve, reserve and replace OM/PA Workflow PCRs

Next Steps

- Monitor the HR/Payroll System communication
  - — BEST Shared Services web site (especially the Updates tab)
    URL: http://www.osc.nc.gov/BEST/index.html
  - — BEACON Training website: What's New link
    URL: http://www.osc.nc.gov/beacon/training/whats_new.html
- Review conceptual materials
- Access the Training HELP site

  URL: http://www.osc.nc.gov/training/osctd/help
- Practice what you've learned

  URL: http://mybeacon.nc.gov
  - — Client 899
  - — Use your current NCID user name and password

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

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

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

Need transactional assistance?

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

Course Assessment/Evaluation

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

CONGRATULATIONS!

You've completed the course!