



FUNDING APPROVER PA PCR PROCESS

FN-2 | TRANSACTIONS SBWP, ZPOS & PO13

FN

The purpose of this Business Process Procedure is to demonstrate how Funding Approvers use transaction PO13 to change the budgeted amount for positions during the PCR review process in the Integrated HR-Payroll System.

Trigger: When reviewing PA PCRs, adjustments to a position's budgeted salary is often required.

Business Process Procedure Overview:

Funding Approvers are required to approve many Personnel Administration actions which necessitate a change to the budgeted amount to the position that the employee holds. The approver will review the PCR's header info to determine if a change to the position is likely. A new screen is opened to review the current budgeted amount for the position. If it is determined that a change is required, the Funding Approver will use transaction PO13 to make the necessary adjustment before returning to PCR and approving.

Access Transactions:

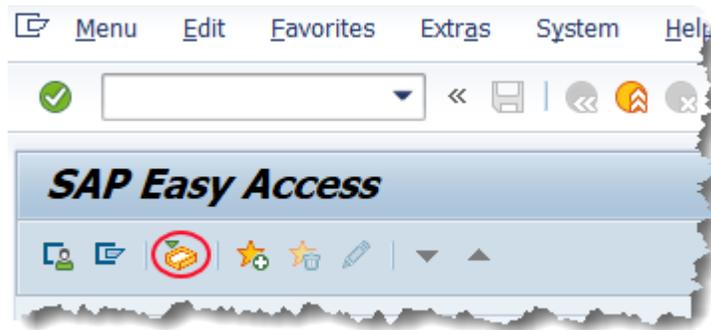
Via Menu Path: SAP menu >> Human Resources >> Organizational Management >> Expert Mode >> PO13 – Position

Via Transaction Code: PO13, ZPOS, SBWP

Note: All data in this document is from the OSC training environment and does not reflect any real-world information.

Procedure

1. Click on the SAP Business Workplace  button to open your inbox.



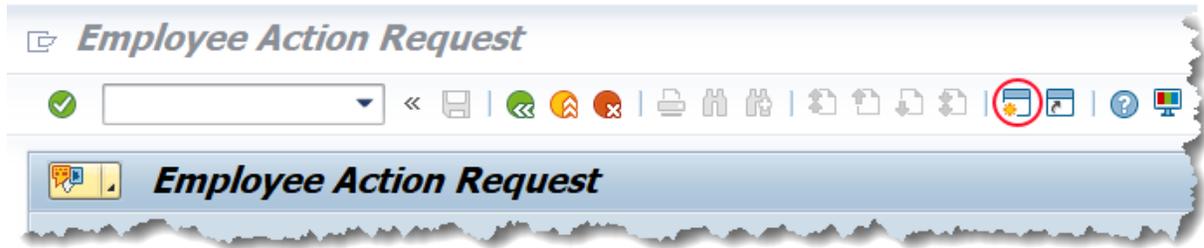
2. Review the Workflow Header for each PCR as part of the approval process. Carefully review the Annual Salary fields.

PCR Number	1000005416						
Personnel Number	10000170	Michelle Anna Salazar 20	Action:	ZC	Salary Adjustment (NC)		
Last 4 digits(SSN)			Reason:	07	Acting Pay		
Effective on	06/01/2016	Chng	04/25/16	ZWFINOMPA191	St:	A	Approved
CURRENT				PROPOSED			
Pers.Area	4601	Natural and Cultural Resources	Pers.Area	4601	Natural and Cultural Resources		
Subarea	NC01	7day Norm	Subarea	NC01	7day Norm		
EE Group	A	SPA Employees	EE Group	A	SPA Employees		
EE Subgroup	A1	FT N-FLSAOT Perm	EE Subgrp	A1	FT N-FLSAOT Perm		
Org. Unit	20010134	CR CDS Archives & History	Org. Unit	20010134	CR CDS Archives & History		
Job	30000804	Administrative Officer II	Job	30000804	Administrative Officer II		
EE Position	65002506	Contracts Administrator	EE Position	65002506	Contracts Administrator		
Basic Pay				Basic Pay			
Pay Scale type	01	Graded	Pay Scale type	01	Graded		
Pay Scale Area	01	Annual Salaries	Pay Scale Area	01	Annual Salaries		
Pay Scale Group	GR70	Level	GR	Pay Scale Group	GR70	Level	GR
Annual Salary	56,170.00	Hrly Sal	0.00	Annual Salary	66,170.00	Hourly Salary	0.00
	Calc Step - +MP				Calc Step - Z	17.80	
				Min	39,632.00		
				Max	63,372.00	Next Inc Date	

If an employee’s salary is changing as part of the PCR process, then the budgeted amount of the position most likely needs to change as well. Make note of the effective date on the PCR and check the budgeted amount for the position in the proposed column. This is the date that will be used when adjusting the position’s budget.

Some PA PCRs have a cost tab. Viewing this area will allow you to see relevant budget information; however, it cannot be changed via Workflow’s PA action approval process.

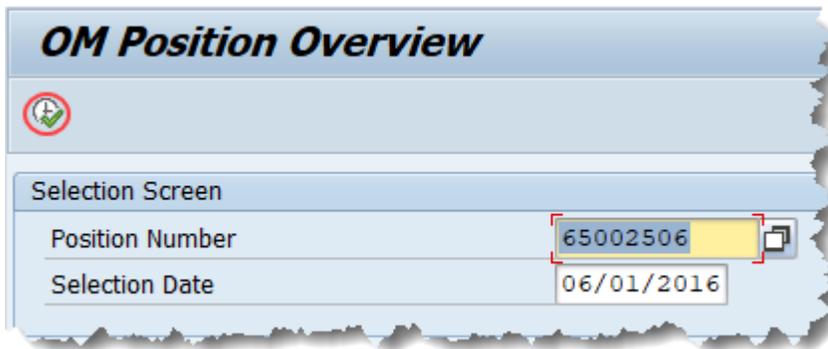
- Click the New GUI Window  button to open a new session of SAP (or use one that you already have open.)



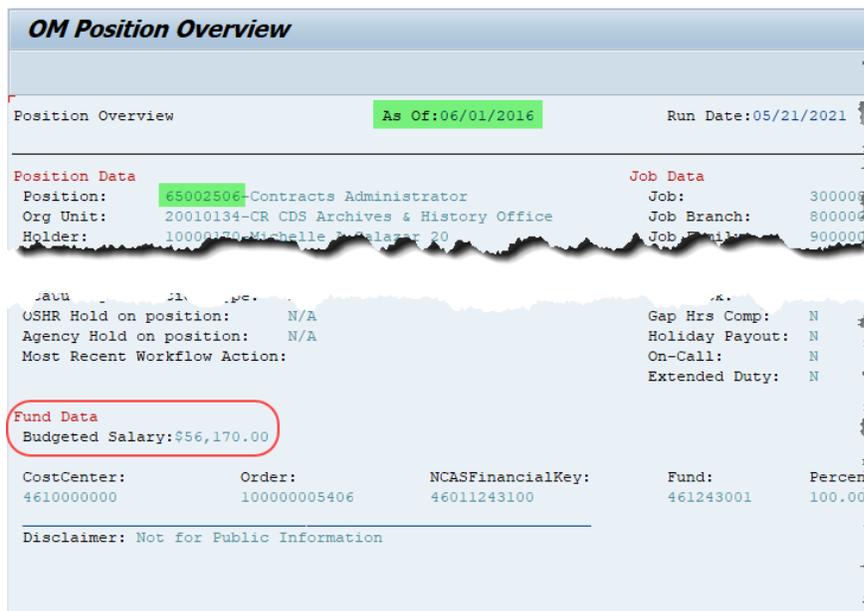
- Input transaction **ZPOS** into the command field. Click the Enter  button.



- Input the position number and effective date that you noted in step 2. Click the Execute  button.



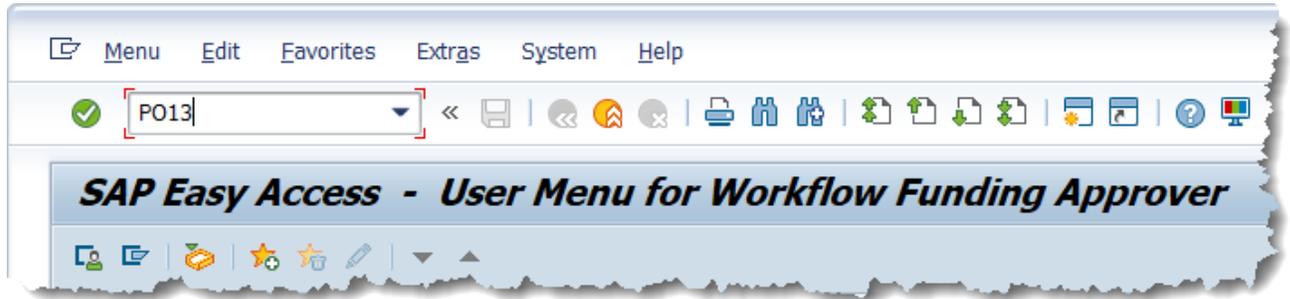
- Review the Fund Data.



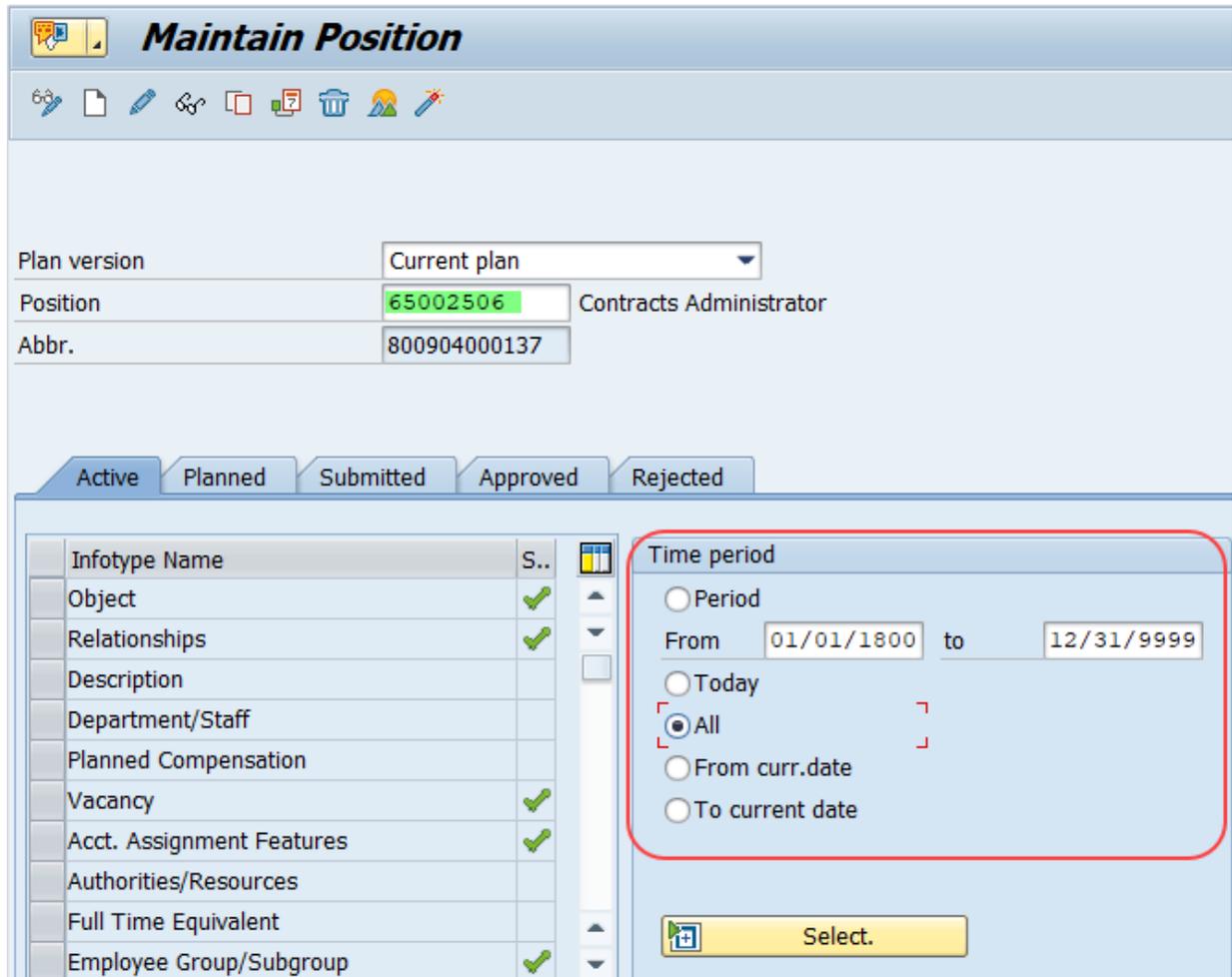
If the position is occupied, it should match the incumbent employee’s salary before the PA action is completed. If it is vacant, then it should match the minimum of its classification.

If the Budgeted Salary equals the amount in the PCR, then no adjustment needs to be made and you can close this window and approve the PCR without further action. Otherwise, proceed with the following steps.

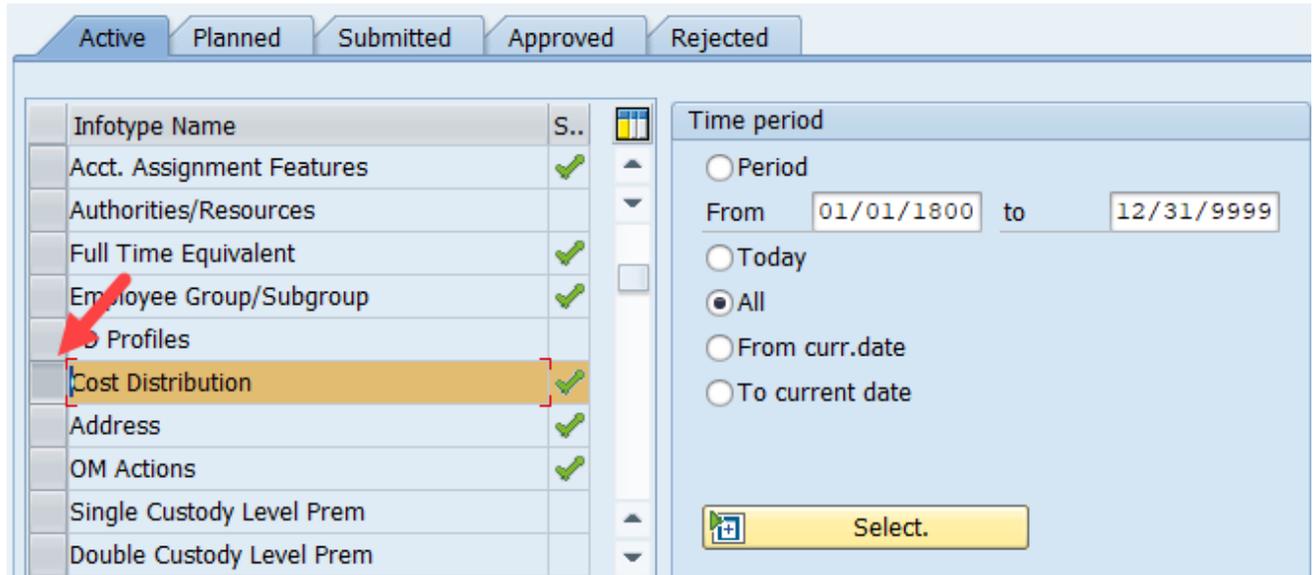
7. Click the back  button twice to bring you back to the SAP Easy Access screen.
8. Input PO13 into the command bar and click the enter  button.



9. The position in question *should* be in the Position field already, but always verify that this is correct! If not, input the position number you are working on and click enter. Also, ensure that your time period encompasses the effective date of the PCR. Using the 'All' option is an easy way to do this.



- Locate and select the Cost Distribution infotype in the list of infotypes. You will have to scroll down just a little way and it will have a check mark next to it.



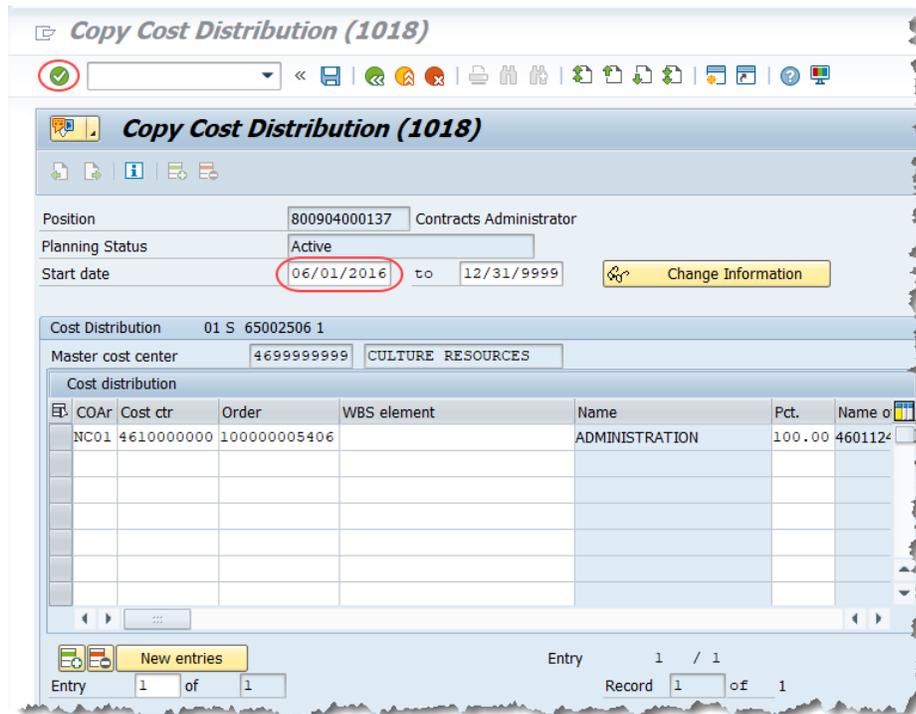
- Click the Copy  button.



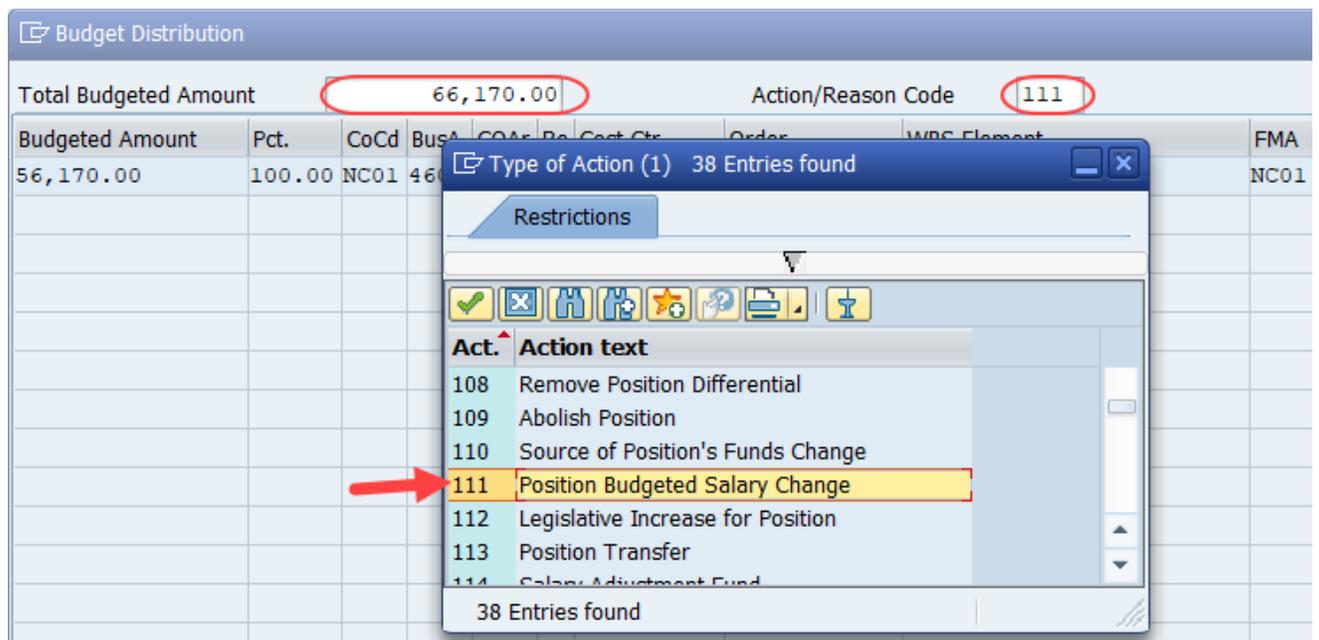
****Very Important****

It is **VERY** important that you use copy when updating a position’s budgeted amount. Doing so will ensure that prior budgetary information is retained.

12. Input the effective date of the PCR in the Start date field and click the Enter  button.

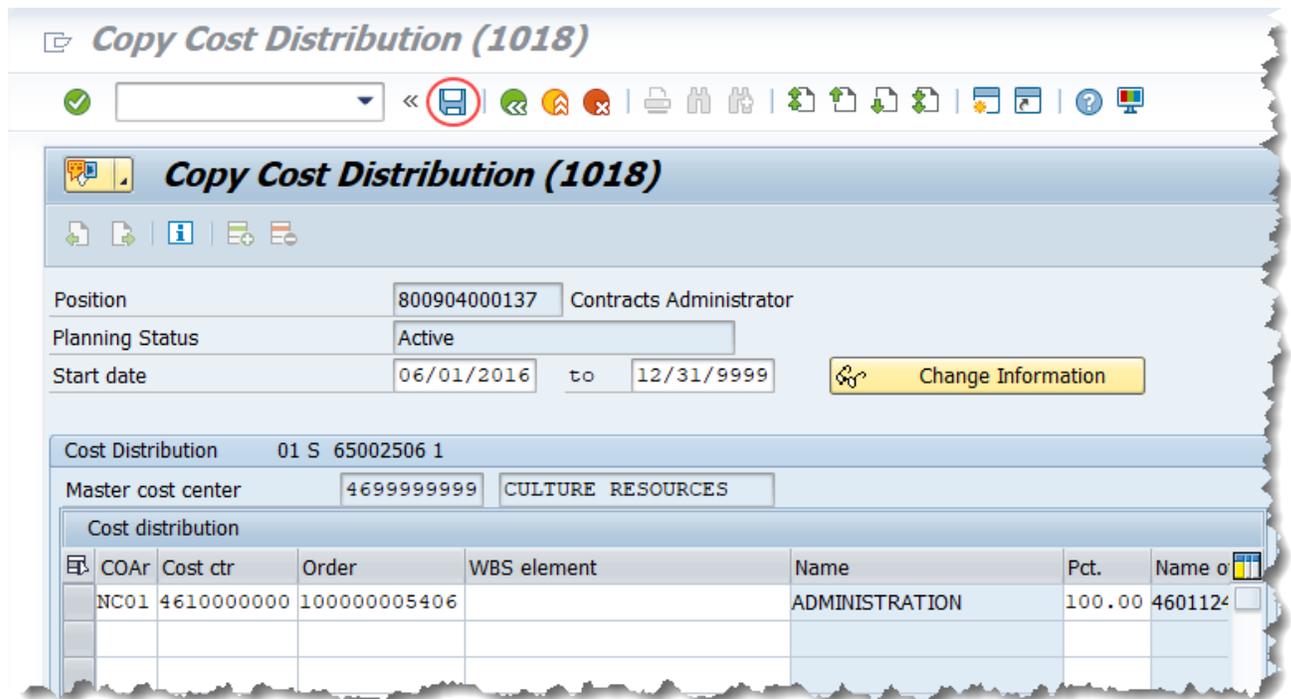


13. On the Budget Distribution screen that comes up, input the proposed salary amount from the PCR. In the Action/Reason field, choose 111 – Position Budgeted Salary Change.

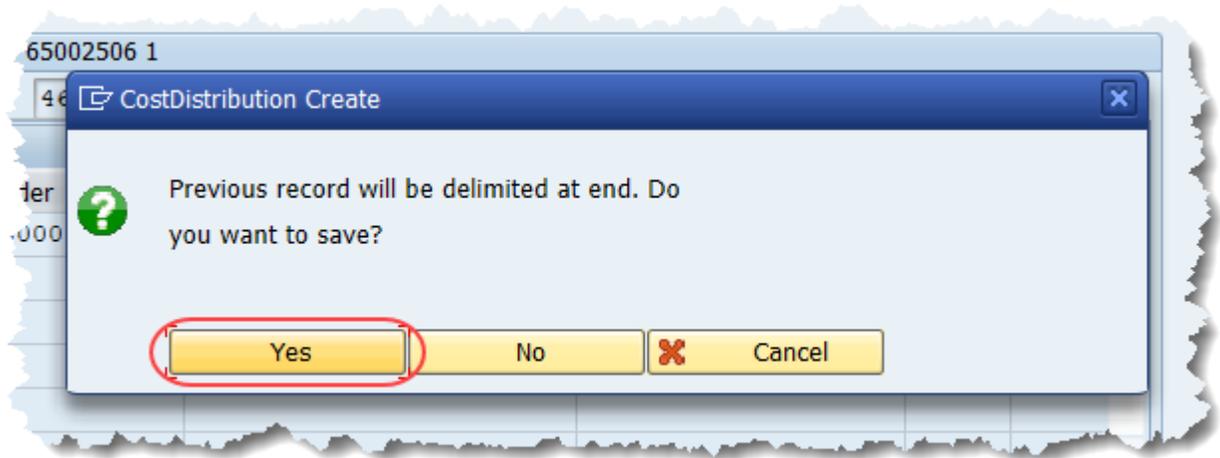


14. Click the Continue  button.

15. Click Save on the Copy Cost Distribution screen.



16. Click Yes in the pop-up window.



By delimiting the previous record, you have created history for this position!

17. You can close the Maintain Position screen, or you can leave it open to use again if you have more PCRs to review.

18. Return to your PCR list and execute the PCR for which you previously viewed the header.

Exe...	Title	Status	Creation Date	Creation TI...
	4601 - Approve PA Action Salary Adjustment (NC) for Michelle Anna Salazar 20 - PCR: 1000005416		04/25/2016	13:04:46
	4601 - Approve PA Action Salary Adjustment (NC) for Michelle Anna Salazar 19 - PCR: 1000005415		04/25/2016	13:04:42
	4601 - Approve PA Action Salary Adjustment (NC) for Michelle Anna Salazar 18 - PCR: 1000005414		04/25/2016	13:04:38
	4601 - Approve PA Action Salary Adjustment (NC) for Michelle Anna Salazar 17 - PCR: 1000005413		04/25/2016	13:04:35

19. On the pop-up window, click into the Cost tab and ensure that your change is reflected in the data.

Employee Action Request - Funding

PCR Number: 1000005416 | Action Type: 2C Salary Adjustment (NC) | Changed by: ZWFINOMPA191
 Personnel No.: 10000170 Michelle Anna Salazar 20 | Reason: 07 Acting Pay | Modified on: 04/25/2016
 Last 5 dig SSN: | Effective on: 06/01/2016 | Status: A

General | **Cost**

Total Budgeted Amount: 66,170.00 | Action/Reason Code: 111

Master cost center: 4699999999 CULTURE RESOURCES

COAr	Cost ctr	Order	WBS element	Name	Pct.	Name o
NC01	4610000000	100000005406		ADMINISTRATION	100.00	4601124

Entry 1 / 1

20. Click the Back button to return to the Decision Step in Workflow Screen. Click Approve Change.

Decision Step in Workflow

Workflow | Create | Import

4601 - Approve PA Action Salary Adjustment (NC) for Michelle Anna Salazar 20 - PCR: 1000005416

Choose one of the following alternatives:

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

Description: Workflow status: Approved. See Attachments/Notes in PCR document. Please review the information on this screen and make one of the following choices: Approve change - the request will continue on...

Objects and attachments:

- Object Attachment: Salary Adjustment for Michelle Salazar eff 6/1/16
- PA PCR: Michelle Anna Salazar 20 PCR:1000005416
- PCR List: Workflow Tracker

21. The system task is complete.

Change Record

- 5/27/21 – Converted from slide presentation to BPP format, updated screen shots, removed out of date references – D. Genzlinger
- 5/27/21 – Updated format, assigned reference number – Claire Ennis