

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 ሯ 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 Salaz	ar 20		Action: ZC	Salary Adjustment (NC) 🚦
Last 4 digits(SSN)				Reason: 07	Acting Pay	
Effective on	06/01/2016	Chng 04/25/16	ZWFINOMPA	191 St: A	Approved	3
CURRE Pers.Area 4601 Subarea NC01	NT Natural and Cultural Resources 7day Norm	Pers. <i>A</i> Subar	Area 460 Yea NCO	PROPOSED 1 Natural a 1 7day Nor	ind Cultural Resources m	
EE Group A	SPA Employees	EE Gro	A quo	SPA Emp	lovees	
EE Subgroup A1	FT N-FLSAOT Perm	EE Su	bgrp A1	FT N-FLS	AOT Perm	
Org. Unit 20010 Job 30000 EE Position 65002	CR CDS Archives & Histor Administrative Officer II Contracts Administrator	y Org. L Job EE Por	Jnit 200 300 sition 650	10134 CR CDS 00804 Adminis 02506 Contrac	i Archives & History strative Officer II ts Administrator	
Basic Pay						
Pay Scale type	01 Graded	Pay S	cale type	01 Graded		
Pay Scale Area	01 Annual Salaries	Pay S	cale Area	01 Annual Salari	ies	1
Pay Scale Group	GR70 Level GR	Pay S	cale Group	GR70 L	Level GR	5
Annual Salary 5	66,170.00 Hrly Sal	0.00 Annua Calc	al Salary Step – Z	66,170.00	Hourly Salary	0.00
		Min	39,63	2.00		3
		Max	63,37	2.00	Next Inc Date	
and the second second second	and the second	and the second second second				-

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.

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



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



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

OM Position Overview		
Selection Screen		
Position Number	65002506	
Selection Date	06/01/2016	
	And the second second	

6. Review the Fund Data.

OM Position O	verview			
Position Overview	2	As Of:06/01/2016	Run Date:05/21	/2021
Position Data Position: 6500 Org Unit: 2001 Holder: 1000	02506-Contracts Admir 10134-CR CDS Archives 0120-Michelle 1984	nistrator 5 & History Office arer 20	Job Data Job: Job Branch: Job Prijl:	300008 800000 900000
Javu Ji OSHR Hold on positi Agency Hold on posi Most Recent Workflo	Lon: N/A Ltion: N/A ww Action:		Gap Hrs Comp: Holiday Payout: On-Call: Extended Duty:	N N N N
Fund Data Budgeted Salary:\$56 CostCenter: 4610000000	5,170.00 Order: 100000005406	NCASFinancialKey: 46011243100	Fund: 461243001	Perce 100.0
Disclaimer: Not for	Public Information			

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.

Maintain Pos	sition		
🦘 🗅 🖉 🗞 🗔 🕫 🖠	<u>8</u> 🎢		
Plan version	Current plan		•
Position	65002506	Cont	tracts Administrator
Abbr.	800904000137	1	
Active Planned Subm	nitted Approve	ed	Rejected
	1 1		
Infotype Name	S.,		Time period
Object		-	○ Period
Relationships	✓	-	From 01/01/1800 to 12/31/9999
Description			⊖Today
Department/Staff			€All
Planned Compensation			OFrom curr.date
Vacancy			To current date
Acct. Assignment Features			
Authorities/Resources			
Full Time Equivalent			Colort
Employee Group/Subgroup		-	

10. 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.

Active Planned Submitted App	orove	d	Rejected
	I		
Infotype Name	s		Time period
Acct. Assignment Features	✓	-	OPeriod
Authorities/Resources		-	From 01/01/1800 to 12/31/9999
Full Time Equivalent	~		◯Today
Employee Group/Subgroup	~		●All
Profiles			From curr.date
Cost Distribution	<		○ To current date
Address	~		
OM Actions	~		
Single Custody Level Prem			Select
Double Custody Level Prem		-	

11. Click the Copy 🛄 button.



Very Important

It is <u>VERY</u> important that you use copy when updating a position's budgeted amount. Doing so will ensure that prior budgetary information is retained.

- Copy Cost Distribution (1018) ţ 🔽 « 🔚 I 🗞 🚷 I 🗁 🖞 👘 I 🏝 🏝 💭 💭 📰 I 📀 💻 P Copy Cost Distribution (1018) 🔉 🕼 i 🖬 i 🗟 🗟 800904000137 Contracts Administrator Position Planning Status Active 06/01/2016 to 12/31/9999 60° Change Information Start date Cost Distribution 01 S 65002506 1 Master cost center 4699999999 CULTURE RESOURCES Cost distribution 🗈 COAr Cost ctr 🛛 Order 🛛 WBS element Name Pct. Name o 100.00 4601124 NC01 4610000000 10000005406 ADMINISTRATION 4 F 4.0 BB New entries Entry 1 / 1 Record 1 Entry 1 of 1 of 1
- 12. Input the effective date of the PCR in the Start date field and click the Enter Subtron.

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.

🖙 Budget Distribution										
Total Budgeted Amour	nt 🄇		6	56,170	.00	Action/Reas	on Code	111	\supset	
Budgeted Amount 56,170.00	Pct. 100.00	CoCd NC01	Bus 460	ça leon ⊡∕⊤γι	pe of Action (1) 38 Entries found	MDC C	lomont	_×	FMA NC01
			101	Act. 108 109 110 111 112 113 114	Restrictions	on Differential n tion's Funds Change ted Salary Change rease for Position fer				
				38 E	Intries found	2007 - UD2			111	

14. Click the Continue 🗹 button.

15. Click Save on the Copy Cost Distribution screen.

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0			•	« 🕒 (🛛 🚫 😡		🎝 🎦	1) 1) 🗐	2 🕐 🖳	
P		Copy Co	st Dis	tributio	n (101	8)				
Ð			>							
Posi	tion			8009040001	37 Contr	acts Administra	tor			
Plan	ning St	tatus		Active						
Star	t date			06/01/201	.6 to	12/31/9999	Se Contraction of Con	Change Ir	nformation	
Cos	st Distr	ibution 01	LS 65002	506 1						
	ster co	ost center	4699	9999999	ULTURE F	ESOURCES				
Ma		stribution								
Ma (Cost di			WBS	element		Name		Pct.	Name o
Ma (Cost di COAr	Cost ctr	Order							
Ma (Cost di COAr NC01	Cost ctr 4610000000	Order 1000000	05406			ADMINIS	STRATION	100.00	4601124
Ma (Cost di COAr	Cost ctr	Order							

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.

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Wo	rkflow 101			
Exe	Title	Status	Creation Date	Creation Ti
8/	4601 - Approve PA Action Salary Adjustment (NC) for Michelle Anna Salazar 20 - PCR: 1000005416	9	04/25/2016	13:04:46
V	4601 - Approve PA Action Salary Adjustment (NC) for Michelle Anna Salazar 19 - PCR: 1000005415	Ø	04/25/2016	13:04:42
V	4601 - Approve PA Action Salary Adjustment (NC) for Michelle Anna Salazar 18 - PCR: 1000005414	Ø	04/25/2016	13:04:38 🥈
Q.	4601 - Anprove PA Action Salary Adjustment (NC) for Michelle Anna Salazar 17 - PCR- 1000005413		04/25/2016	12.04.35

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

R Number [1000005416]	Action Type ZC Salary			
R Number 1000005416	Action Type ZC Salary			
st 5 dig SSN	Reason 07 Acting Effective on 06/01	Adjustment (NC) Pay /2016	Changed by Modified on Status	ZWFINOMPA1 04/25/2016 A
Total Budgeted Amount 66, 170.00	Action/Reason Code	111		
Cost distribution	.25			
COAr Cost ctr Order WBS element	Name	Pct. Name o		
NC01 4610000000 10000005406	ADMINISTRATION	100.00 4601124		
		A		

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 1000005416	(NC) for Michelle Anna Salazar 20 - PCR:
Choose one of the following alternative	
Approve Change	
Return to the Initiator	
Cancel and keep work item in inbox	
Cancel and keep work item in inbox	
Cancel and keep work item in inbox	Objects and attachments
Cancel and keep work item in inbox Description Workflow status: Approved	Objects and attachments
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:	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