



FUNDING APPROVER INBOX

WF-4 | TRANSACTIONS SBWP, PO13



The purpose of this Business Process Procedure is to explain how to review, approve, or reject the funding and/or salary on a position related to the Personnel Change Request (PCR) in the Integrated HR-Payroll System.

Trigger: As the Agency Funding Approver, you need to log into your SAP Business Workplace (inbox) to review, approve or reject the funding and/or salary on a position related to the Personnel Change Request (PCR).

Business Process Procedure Overview:

The Funding Approver is responsible for updating and maintaining Infotype 1018 (Cost Distribution infotype) and Infotype 9018 (Budget infotype) directly on these infotypes via transaction PO13 and not through the workflow process.

Tips and Tricks:

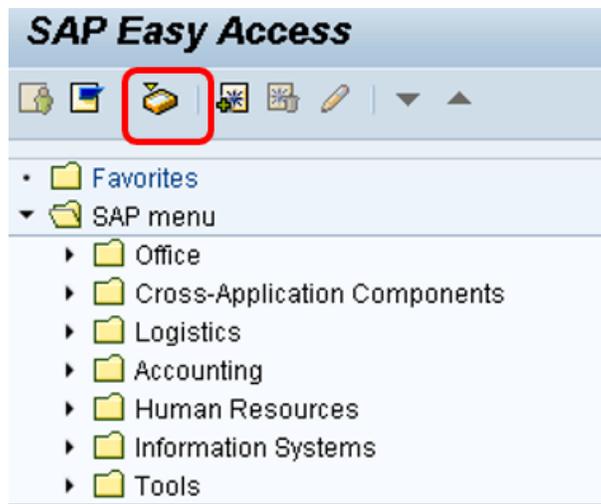
It is important to maintain the position budgeted salary to match employee salary unless there is an approved exception.

Access Transaction:

Via Menu Path: Your menu path may contain this custom transaction code depending on your security roles.

Via Transaction Code: ZPAA076

Procedure



1. Click the **SAP Business Workplace (Ctrl+F12)**  button. The Business Workplace is displayed.

Business Workplace of Workflow Funding Approver

New message Find folder Find document Appointment calendar Distribution lists

Workplace: Workflow Funding Approver

- Inbox
 - Unread Documents 0
 - Documents 0
 - Workflow 61**
 - Grouped according to task
 - Grouped according to content
 - Grouped according to content type
 - Grouped according to sort key
 - Overdue entries 0
 - Deadline Messages 0
 - Incorrect entries 0
- Outbox
- Resubmission
- Private folders
- Shared folders
- Folders subscribed to
- Trash
- Shared trash

Workflow 61

Ex.	Title	Status	Creation Da...	Creation ...	P Att...	Co...	W...
4601	Approve PA Action Salary Adjustment (NC) for Susan Casto		01/19/2011	13:58:02	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:37:15	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:37:01	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:36:48	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:36:25	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:36:22	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:36:09	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:35:57	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:35:44	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:35:30	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:35:17	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:35:04	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:34:51	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:34:38	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:34:25	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:34:11	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:33:58	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:33:45	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:33:31	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:33:17	5		
4601	Approve PA Action Salary Adjustment (NC) for Richard Aist		07/03/2008	07:33:04	5		
4601	Approve PA Action Salary Adjustment (NC) for George Cru		06/27/2008	14:34:29	5		
4601	Approve PA Action Salary Adjustment (NC) for George Cru		06/27/2008	14:34:13	5		

Tips & tricks: Create substitute...

4601 - Approve PA Action Salary Adjustment (NC) for Susan Castro - PCR: 1000005329

Description
Workflow status: **Approved**
Please review the information on this screen and make one of the following choices:
Approve change - the request will continue onto the next approver or processor.

Objects and attachments

- PA PCR: Susan Castro PCR-1000005329
- PCR List: Workflow Tracker

- Click one time on the PCR to be reviewed and approved.
- Click the **Execute (F8)**  button.

NOTE: You can also double-click the PCR to execute.

Employee Action Request - Funding

PCR Number: 1000005329 Action Type: ZC Salary Adjustment (NC) Changed by: ZWF1N0MPA025
 Personnel No.: 80000610 Susan Castro Reason: 12 In-Range - Higher Level Modified on: 01/19/2011
 Last 5 dig SSN: Effective on: 01/24/2011 Status: A

General Cost

CURRENT		PROPOSED	
Pers.Area	4601 Cultural Resources	Pers.Area	4601 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	A1 FT N-FLSAOT Perm	EE Subgrp	A1 FT N-FLSAOT Perm
Org. Unit	20010310 CR CDS A&H MOH Design Sec	Org. Unit	20010310 CR CDS A&H MOH Design Sec
Job	30001520 Museum Specialist	Job	30001520 Museum Specialist
EE Position	65001875 Lighting And Interactive Design...	EE Position	65001875 Lighting And Interactive Design...

Basic Pay

Pay Scale type	01 Graded	Pay Scale type	01 Graded
Pay Scale Area	01 Annual Salaries	Pay Scale Area	01 Annual Salaries
Pay Scale Group	GR66 Level GR	Pay Scale Group	GR66 Level GR

- Review the Employee Action Request information on the General tab. This is the information submitted by the Initiator.

5. Scroll down to view the entire record which includes the new salary.

Employee Action Request - Funding

PCR Number: 1000005329 Action Type: ZC Salary Adjustment (NC) Changed by: ZWF1NOMPA025
 Personnel No.: 80000610 Susan Castro Reason: 12 In-Range - Higher Level Modified on: 01/19/2011
 Last 5 dig SSN: Effective on: 01/24/2011 Status: A

General **Cost**

Job: 30001528 Museum Specialist Job: 30001528 Museum Specialist
 EE Position: 65001875 Lighting And Interactive Design... EE Position: 65001875 Lighting And Interactive Design...

Basic Pay

Pay Scale type: 01 Graded	Pay Scale type: 01 Graded
Pay Scale Area: 01 Annual Salaries	Pay Scale Area: 01 Annual Salaries
Pay Scale Group: GR66 Level: GR	Pay Scale Group: GR66 Level: GR
Annual Salary: 31,959.00 Calc Step - 0	Annual Salary: 33,600.00 Hourly Salary: 0.00 Calc Step - -MP 5.13 Min: 32,796.00 Max: 51,446.00 Next Inc Date:

Dates

Last worked day:

6. When you have finished with your review, click on the **Cost tab** **Cost** to review funding information. The Funding Approver cannot make any changes to Infotypes 1018/9018 from within the workflow. Once the information has been verified, the Fund Approver should go directly to IT1018 and IT9018 via transaction PO13 to update any changes to cost distribution or salary.

Employee Action Request - Funding

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 Last 5 dig SSN: Effective on: 01/24/2011 Status: A

General **Cost**

Total Budgeted Amount: 31,959.00 Action/Reason Code: 30

Master cost center: 4699999999 CULTURE RESOURCES

CO...	Cost ctr	Order	WBS element	Name	Pct.	Name of
NC01	4611000000	100000005437		DIRECTOR'S OFFICE	100.00	4601150

Entry 1 / 1

This is a continuation of the Cost Tab screen below.

Employee Action Request - Funding

PCR Number: 1000005329 Action Type: ZC Salary Adjustment (NC) Changed by: ZWFINOMPA025
 Personnel No.: 80000610 Susan Castro Reason: 12 In-Range - Higher Level Modified on: 01/19/2011
 Last 5 dig SSN: Effective on: 01/24/2011 Status: A

General Cost

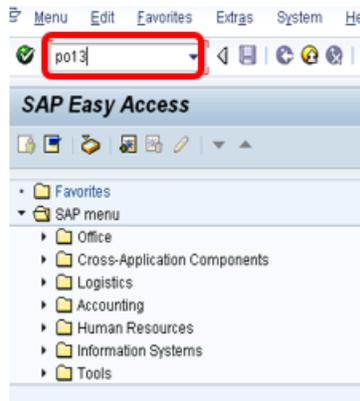
Total Budgeted Amount: 31,959.00 Action/Reason Code: 30

Master cost center: 4699999999 CULTURE RESOURCES

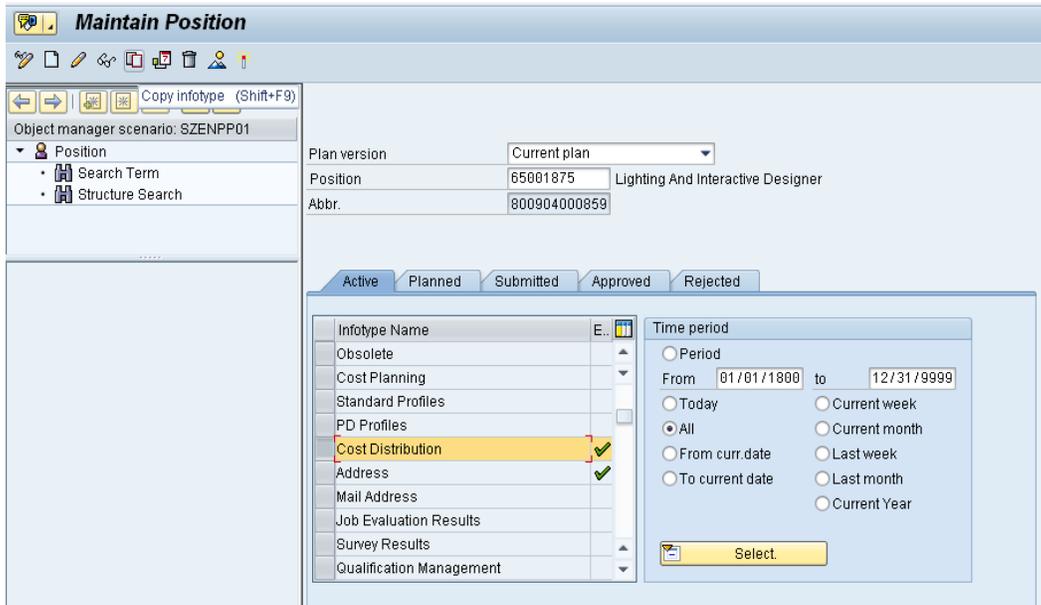
Pct.	Name of aux. account	Fund	Name	Functional Area
100.00	46011500110	461500001	MUSEUM OF HISTORY	6000000000000001

Entry 1 / 1

7. Scroll to the right and left to view the entire cost distribution record. The salary and reason code are also displayed.
8. Click the **Back (F3)**  button until you get back to the SAP Easy Access screen. You now need to update the position on the PO13 screen.



9. Enter **PO13** in the Command field. The Maintain Position screen displays.



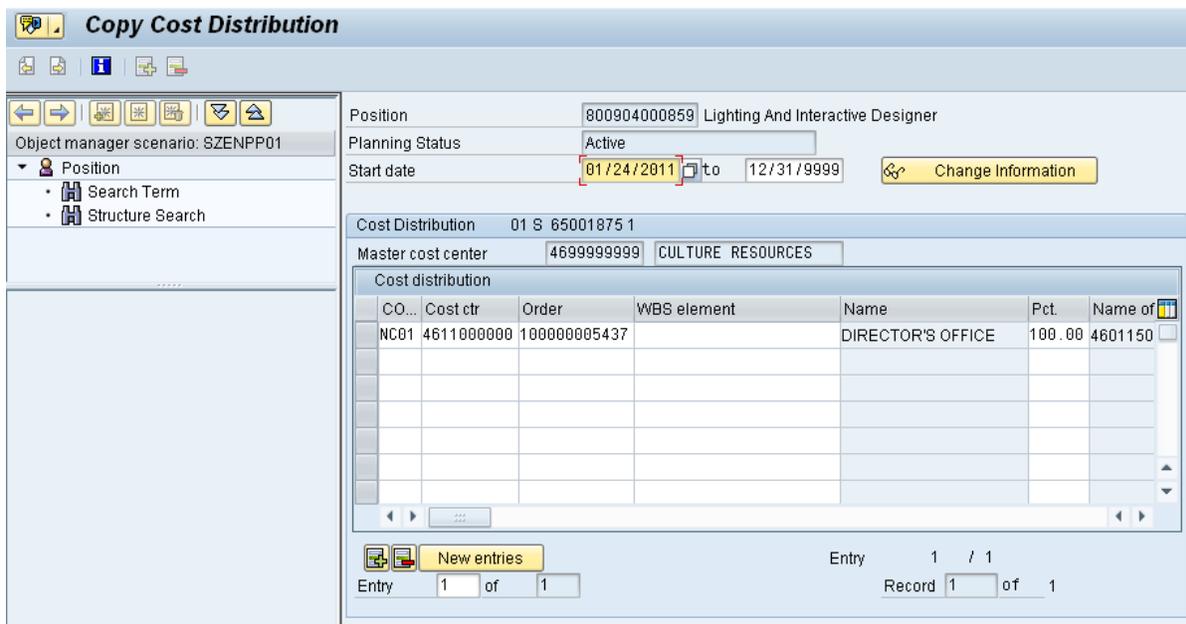
10. Update the following fields:

Field Name	Description	Values
Position number	Eight-digit unique number identifying the position	Enter value in Position. Example: 65001875

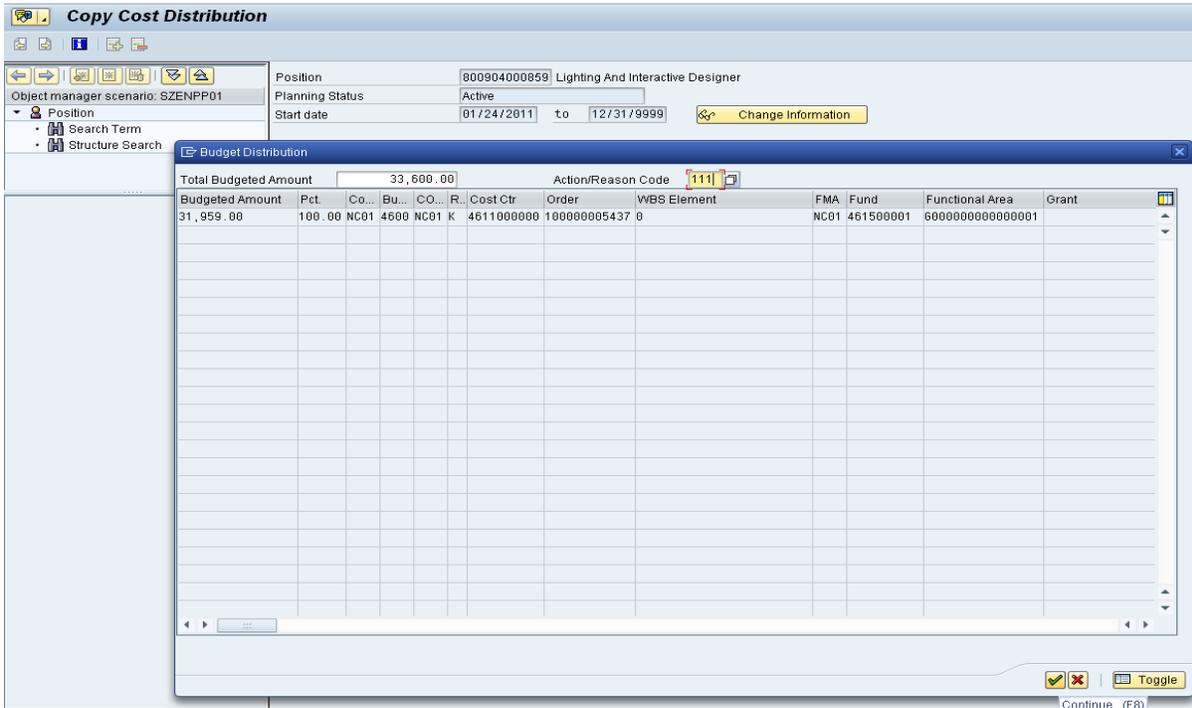
11. Click the **Enter**  button.

12. Select the **Cost Distribution** infotype for the position specified in the PCR.

13. Click the **Copy**  button.



14. Change the **date** to match the date of the PCR.
15. Change the **cost distribution** as appropriate.
16. Scroll to the right to update the **fund information**.
17. Click the **Enter**  button go to the budgeted salary **Infotype 9018**.

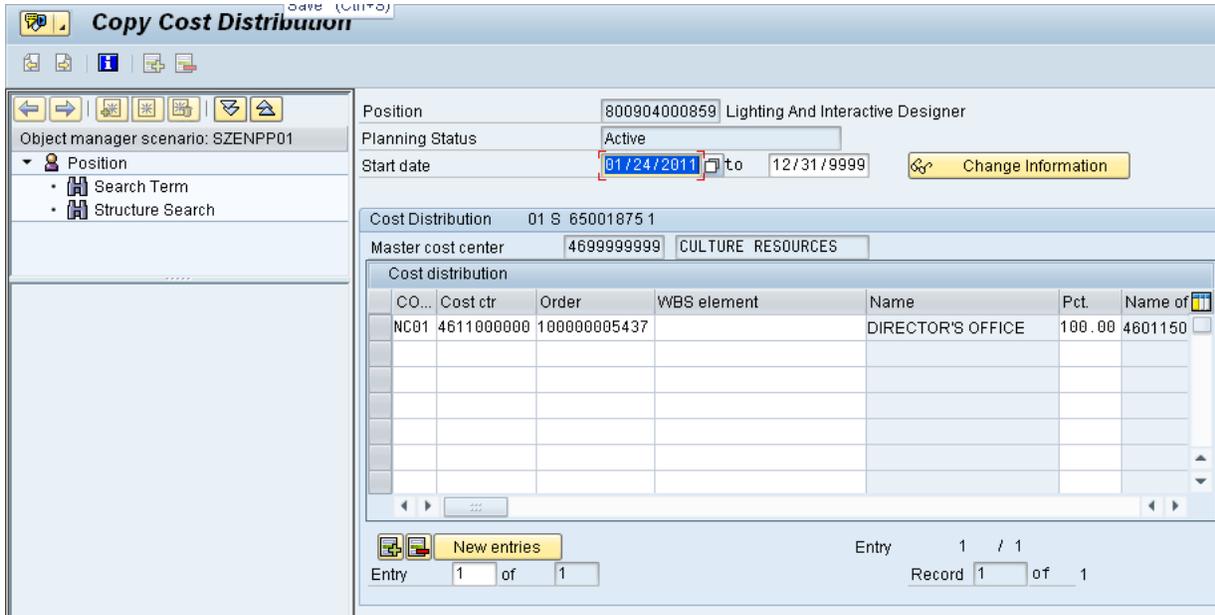


18. Update the budgeted salary.
19. Enter one of the following action/reason codes:
 - 111 - Position Budgeted Salary Change
 - 110 - Source of Position's Funds Change.

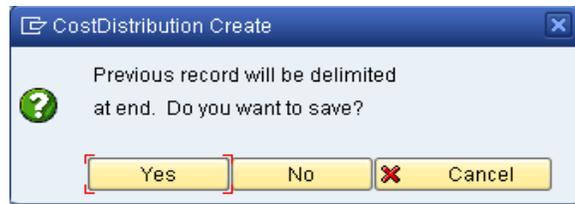


CRITICAL! It is important to only use 111 when you are changing the salary since a salary increase record will be sent to the Salary Control System at OSBM.

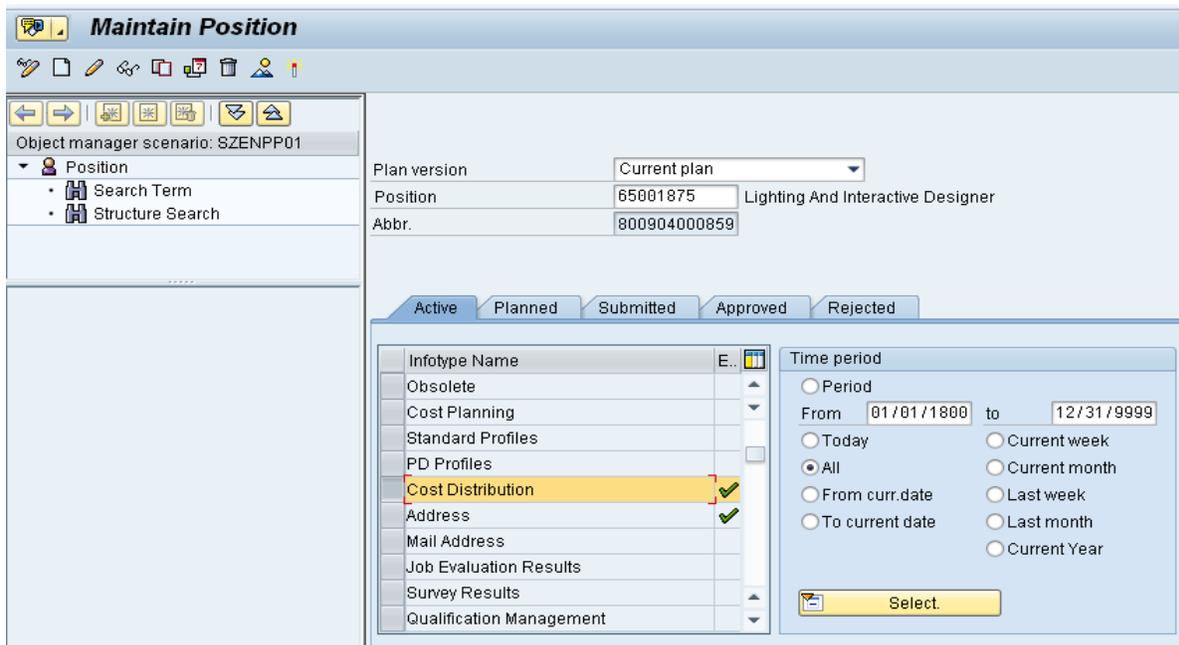
20. Click the **Copy (Enter)**  button.



21. Click the **Save (Ctrl+S)**  button to save your changes.



22. Click the **Yes**  button to delimit the previous record.



23. Click the **Back (F3)**  button to return to your inbox to complete the approval of the PCR.

Business Workplace of Workflow Funding Approver

New message Find folder Find document Appointment calendar Distribution lists

Workflow: Workflow Funding Approver

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- Unread Documents 0
- Documents 0
- Workflow 61**
 - Grouped according to task
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 - Grouped according to content type
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Outbox

- Resubmission
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Tips & tricks: Create substitute...

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Description
Workflow status: **Approved**

Please review the information on this screen and make one of the following choices:

Approve change - the request will continue onto the next approver or processor.

Objects and attachments

- PA PCR: [Susan Castro PCR:1000005329](#)
- PCR List: [Workflow Tracker](#)

Now that the salary has been updated on 1018/9018, it is time to approve the PCR.

24. Select the PCR for the employee you have been processing.

Decision Step in Workflow

Workflow Create

4601 - Approve PA Action Salary Adjustment (NC) for Susan Castro - PCR: 1000005329

Choose one of the following alternatives

Approve Change

Return to the Initiator

Cancel and keep work item in inbox

Description
Workflow status: **Approved**

Please review the information on this screen and make one of the following choices:

Approve change - the request will continue onto the next approver or processor.

Return to the initiator - the request will be returned to the person creating the request.

Cancel and keep work item in inbox - the user decision remains in your inbox for processing.

Thank You

Objects and attachments

- PA PCR: [Susan Castro PCR:1000005329](#)
- PCR List: [Workflow Tracker](#)

Once the 1018/9018 infotypes have been updated directly via transaction PO13, approve the PCR.

25. Select **Approve Change** to approve the PCR.

OPTIONS:

- Return to Initiator if there is a problem and you want to reject the PCR.
- Cancel and keep the PCR in inbox if you do not wish to take action at this time.

This completes the Fund Approver's steps. The PCR will no longer be located in the inbox.

Additional Resources

Training HELP website: https://www.osc.nc.gov/training/training_help_documents

Change Record

Change Date: 5/13/20 – Changed by C. Ennis

Changes: Updated format, assigned reference number, and made accessible

Change Date: 4/30/21 – Changed by D. Genzlinger

Changes: Reassigned to Workflow category