



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

SAP	SAP Easy Access						
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• 🗋 Fat	vorites P monu						
•) Office						
•	Cross-Application Components						
> 🛄	Accounting Human Resources						
) 🗋) Information Systems) Tools						

1. Click the SAP Business Workplace (Ctrl+F12) 2 button. The Business Workplace is displayed.

Business Workplace of Workflow Funding App	prover	
🐯 New message 🛛 Find folder 🖓 Find document 💿 Appointr	nent calendar 🛛 🗃 Distribution lists	
Workplace: Workflow Funding Approver Solution	90 ~00 72 0. 10	I III F I H
Unread Documents 0	Workflow 61	
• 🛃 Documents 0	Ev. Title	Status Creation Da Creation P Att Co W
Workflow 61	4601 - Annrove PA Action Salary Adjustment (NC) for Susan Cast	01/19/2011 13:58:02 5
 Grouped according to task 	4601 - Approve PA Action Salary Adjustment (NC) for Bisbard Alst	► 07(03(2008 07:37:15 5)
 Grouped according to content 	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	
Grouped according to content type	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	07/03/2008 07:36:48 5
Grouped according to sort key	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	07/03/2008 07:36:35 5
Overdue entries 0	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	07/03/2008 07:36:22 5
 Deadline messages u Interment entries 0 	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	07/03/2008 07:36:09 5
Outbox	8 4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	O7/03/2008 07:35:57 5
Resubmission	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:35:44 5
A Private folders	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	
Shared folders	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:35:17 5
Folders subscribed to	🐵 4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:35:04 5
• 🛱 Trash	😻 4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:34:51 5
 T Shared trash 	😻 4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:34:38 5
	😻 4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:34:25 5
	😻 4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:34:11 5
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:33:58 5
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:33:45 5
	😻 4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:33:31 5
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:33:17 5
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø 07/03/2008 07:33:04 5
	4601 - Approve PA Action Salary Adjustment (NC) for George Crur	O6/27/2008 14:34:29 5 O6/27/2008 14:34:29 5 O6/27/2008 14:34:29 5 O6/27/2008 14:34:29 O6/27/2008 O6/27 O6/27 O6/27/2008 O6/20 O6/27 O6/27/2008 O6/27 O6/27
	4601 - Approve PA Action Salary Adjustment (NC) for George Crur	<u>16/27/2008</u> 14:34:13 5
		🎾 Tips & tricks: Create substitute
	4601 - Approve PA Action Salary Adjustment (NC	for Susan Castro - PCR: 1000005329
	Description	Objects and attachments
	Workflow status: Approved	 BA BCP: Supan Captro BCP:1000006329
		PCR List: Workflow Tracker
	Please review the information on this screen and make one of t following choices:	he
	Approve change - the request will continue onto the next approver or processor.	

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

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

CR Number ersonnel No. ast 5 dig SSN	100000	05329 510 Su	san Castro	Action Type 2 Reason 1 Effective on	C Salary Ad 2 In-Range 81/24/2	ljustment (NC) - Higher Level 811	Changed by Modified on Status	ZWFINOMPA 01/19/201 A
General	Cost						ſ	
	CURRE	ENT			PROP	OSED		Ť.
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Subarea	NC01	7day No	m	Subarea	NC01	7day Norm		
EE Group		SPA Emp	loyees	EE Group	A	SPA Employees		III.
EE Subgroup	A1 1	FT N-FLS	AOT Perm	EE Subgrp	A1	FT N-FLSAOT Perm		
Org. Unit	200103	310 C	R CDS A&H MOH Design Sec	Org. Unit	20010310	CR CDS A&H MOH Design Se	c	
Job	300015	528 M	useum Specialist	Job	38881528	Museum Specialist		
EE Position	650018	875 LI	ghting And Interactive Design	EE Position	65001875	Lighting And Interactive Desig	n	
Basic Pay								
Pay Scale t	уре	01 Gra	ided	Pay Scale type	81 Gr	aded		
Pay Scale /	Area	81 Anr	ual Salaries	Pay Scale Area	a 01 An	nual Salaries		

4. 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.

mployee Action Request - Funding		
PCR Number 1800005329 Personnel No. 80000610 Susan Castro Last 5 dig SSN	Action Type ZC Salary Adjustment (NC) Changed by Reason 12 In-Range - Higher Level Modified on Effective on 01/24/2011 Status	y ZWFINOMPA025 01/19/2011 A
Job 30001528 Museum Specialist EE Position 65001875 Lighting And Interactive Design	Job 30001528 Museum Specialist EE Position 65001875 Lighting And Interactive Design	•
Basic Pay Pay Scale type 01 Graded Pay Scale Area 01 Annual Salaries Pay Scale Group 6R66	Pay Scale type 01 Graded Pay Scale Area 01 Annual Salaries Pay Scale Group 6R66 Level 6R	
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]
Dates	Max 51,446.00 Next Inc Date	
• •	Lastworked 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.

R Numt rsonnel	ber] 10000	05329 0610 Susan C	castro	Action Type ZC Salary Reason 12 In-Rar	Adjustmer	nt (NC) er Level	C M	hanged by Iodified on	ZWFINOMPA0 01/19/2011
ist 5 dig SSN			Effective on 01/24	Effective on 01/24/2011				А	
Gene	eral Cost								
Total	Budgeted Amo	unt 31,959	9.00	Action/Reason Code	30				
Total	Budgeted Amo	unt 31,959	9.00	Action/Reason Code	30				
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This is a continuation of the Cost Tab screen below.

Employee Action Request - Funding	
PCR Number 1000005329 Personnel No. 80000610 Susan Castro Last 5 dig SSN	ction Type ZC Salary Adjustment (NC) Changed by ZWF INOMPA025 eason 12 In-Range - Higher Level Modified on 01/19/2011 ffective on 01/24/2011 Status A
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 O	ISTORY 60000000000000
	< >

- 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.

👼 📕 Maintain Position	
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Image: Scenario: SZENPP01 Image: Scenario: SZENPP01	Plan version Current plan Position 65001875 Lighting And Interactive Designer Abbr. 800904000859
	Active Planned Submitted Approved Rejected
	Obsolete Period Cost Planning From 01/01/1800 to 12/31/9999 Standard Profiles Today PD Profiles All Cost Distribution From curr.date Address To current date Job Evaluation Results Current Year Gualification Management Select.

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** Sutton.
- 12. Select the **Cost Distribution** infotype for the position specified in the PCR.
- 13. Click the **Copy** 🖸 button.

👦 Copy Cost Distribution	1			
68 11 24 24				
	Position	800904000859 Lighting And Interact	tive Designer	
Object manager scenario: SZENPP01	Planning Status	Active		
🝷 🚨 Position	Start date	01/24/2011 🗇 to 12/31/9999	🔗 Change Infor	mation
• 🛗 Search Term				
• 🕞 Structure Search	Cost Distribution 01 S 65	0018751		
	Master cost center 46	99999999 CULTURE RESOURCES]	
	Cost distribution			
	CO Cost ctr Order	WBS element	Name	Pct. Name of
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				-
				4 1
	New entries	E	ntry 1 / 1	
	Entry 1 of 1		Record 1 of	_1

- 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 Solution go to the budgeted salary Infotype 9018.

👼 📘 Copy Cost Distribution	1												
(나라) 동문 (1997) (정소) Object manager scenario: SZENPP01 • 온 Position	Position Planning Sta	atus			8 A	0090400085 ctive	9 Lighting And I	nteractive Designer	Change Informatio	n			
B Search Term B Structure Search													
Total Budgeted	Amount [33,6	500.0	0		Action/Reaso	Code 111	1				<u> </u>
Budgeted Amo	unt Pct.	Co	Bu	co	R	Cost Ctr	Order	WBS Element	FMA	Fund	Functional Area	Grant	
31,959.00	100.00	NCOT	4600	NCOT	к	4611000000	10000005437	U	NCOT	461500001	6000000000000000		
													* *
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		_	_	_	_							×	Toggle

- 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.



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

Copy Cost Distribution	ui r o)					
681						
Object manager scenario: SZENPP01	Position 800904000859 Lighting And Interactive Designer					
Section Section Generation	Start date	01/24/2011 1 to 12/31/9999	ୟ <mark>ିଂ</mark> Change Information			
• 🙀 Structure Search	Cost Distribution 01 S 650 Master cost center 4699	018751 19999999 CULTURE RESOURCES				
	Cost distribution CO Cost ctr Order	WBS element	Jame Pct. Na	ame of 📆		
	NC01 4611000000 1000000	05437 D	IRECTOR'S OFFICE 100.00 460	01150		
				-		
				▼ 4 ►		
	Entry 1 of 1	Ent	try 1 / 1 Record 1 of 1			

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



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

👦 J Maintain Position					
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 ◆● 畿 圏 階 ▼ 全 Object manager scenario: SZENPP01 ◆ Position ・ 聞 Search Term ・ 聞 Structure Search 	Plan version Position Abbr.	Current plan 65001875 800904000859	Lighti	ng And Interactive	Designer
	Active Planned S	ubmitted App	proved	Rejected	
	Infotype Name Obsolete	E.,	•	Time period	
	Cost Planning		-	From 01/01	/1800 to 12/31/9999
	PD Profiles			O Today	O Current week
	Cost Distribution	×		From curr.da	te OLast week
	Address	 ✓ 		O To current da	ite OLast month
	Mail Address				O Current Year
	Job Evaluation Results				
	Qualification Management		-	E Sele	ect.

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

Business Workplace of Workflow Funding App	rover						
🖓 New message 🛛 🔀 Find folder 🕼 Find document 🐵 Appointment calendar 🔗 Distribution lists							
🖌 Workplace: Workflow Funding Approver							
🝷 🧽 Inbox							
🔹 🛃 Unread Documents 0	VVorktiow 61						
• 🛃 Documents 0	Ex Title	Status	Creation Da	Creation	P Att Co W		
 Workflow 61 	4601 - Approve PA Action Salary Adjustment (NC) for Susan Casti	0	01/19/2011	13:58:02	5		
Grouped according to task	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	ø	07/03/2008	07:37:15	5		
Grouped according to content	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	ě	07/03/2008	07:37:01	5		
Grouped according to content type	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ň	07/03/2008	07:36:48	5		
Grouped according to sort key	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	ě	07/03/2008	07:36:35	5		
Overdue entries U	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ň	07/03/2008	07:36:22	5		
• Deadline Messages U	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ř	07/03/2008	07:36:09	5		
Outher	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ň	07/03/2008	07:35:57	5		
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ř	07/03/2008	07:35:44	5		
Resubmission	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	ě	07/03/2008	07:35:30	5		
Shared folders	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ř	07/03/2008	07:35:17	5		
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	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	ě	07/03/2008	07:34:11	5		
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	ě	07/03/2008	07:33:58	5		
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	ě	07/03/2008	07:33:45	5		
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ò	07/03/2008	07:33:31	5		
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ø	07/03/2008	07:33:17	5		
	4601 - Approve PA Action Salary Adjustment (NC) for Richard Alst	Ò	07/03/2008	07:33:04	5		
	🐵 4601 - Approve PA Action Salary Adjustment (NC) for George Crur	Ŷ	06/27/2008	14:34:29	5		
	3 4601 - Approve PA Action Salary Adjustment (NC) for George Crut	Ŕ	06/27/2008	14:34:13	5		
	4601 - Approve PA Action Salary Adjustment (NC)	for Su	san Castro	% - PCR: 1	Tips & tricks:	Create substitute	
	Developing Objects and etterhouse						
	Ubjects and attachments						
	Workflow status: Approved • PA PCR: Susan Castro PCR:1000005329				<u>329</u>		
	Please review the information on this screen and make one of th following choices:	he	PUK_LIST. Workflow Tracker				
	Approve change - the request will continue onto the next approver or processor.						

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							
	Set Workflow (D) 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 • <u>PA PCR: Susan Castro PCR:1000005329</u> • <u>PCR_List: Workflow Tracker</u>					

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