WF-17 Workflow Tracker

Purpose

The purpose of this job aid is to review the Workflow Tracker tool.

Overview

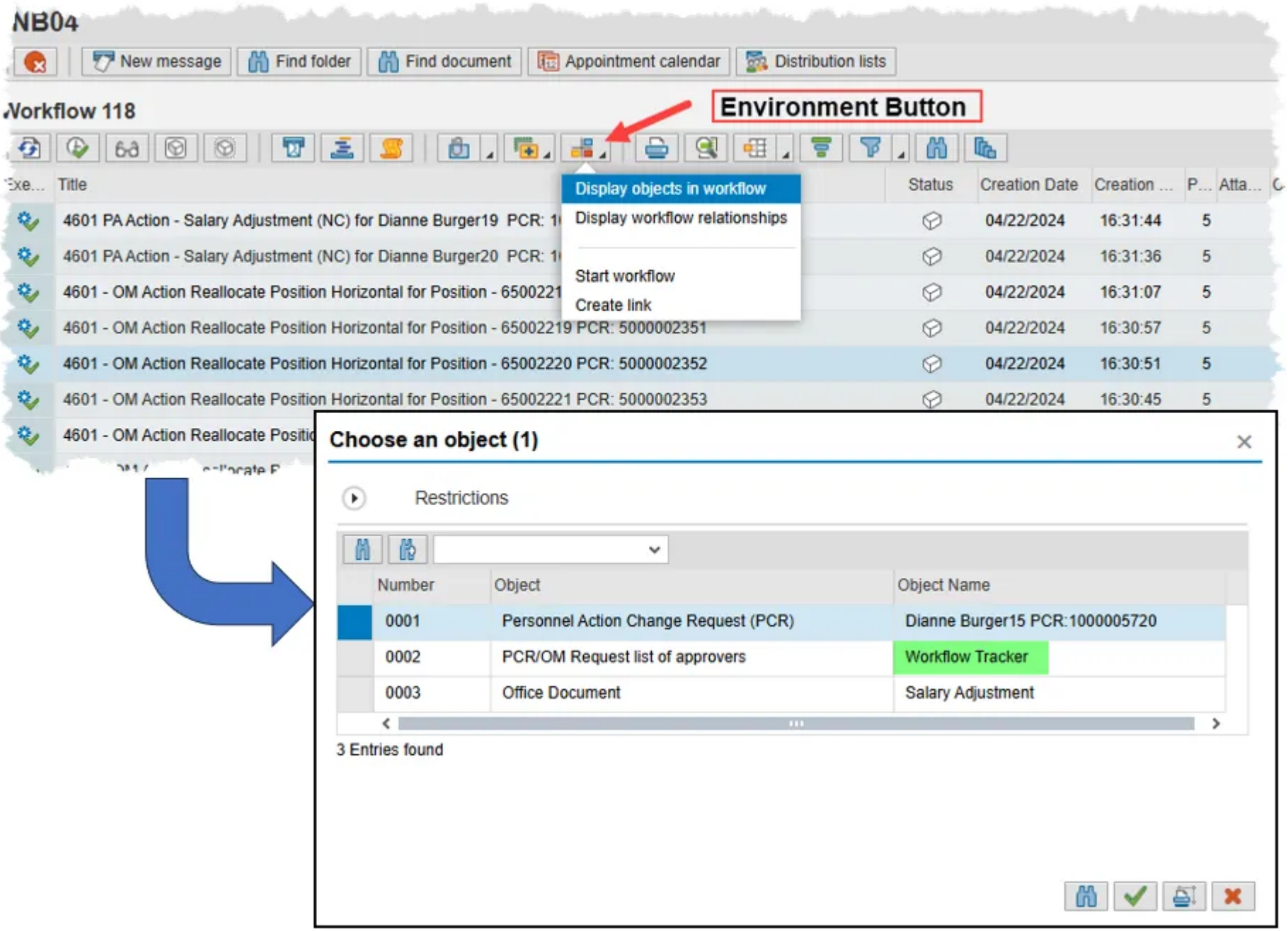
Workflow is the electronic approval process for making changes to person and position data in the system. The **Workflow Tracker** is a tool which shows who initiated, who’s approved/rejected, and who the next approvers are in the process for a workflow item.

Procedure

The Workflow Tracker can be accessed from your SAP Business Workplace Inbox and Outbox as well as on the Decision Step screen.

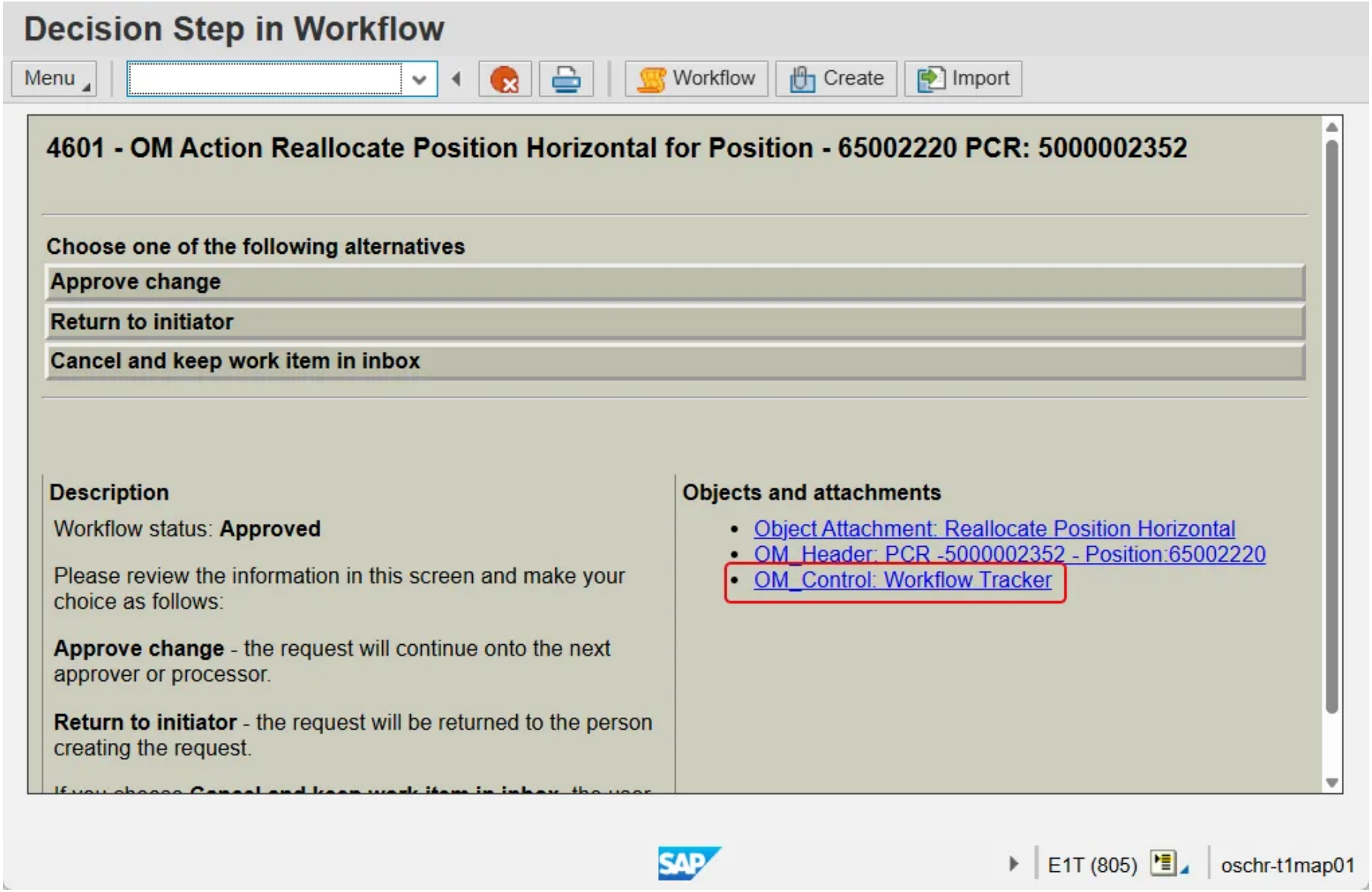
To view the Tracker from your Inbox or Outbox, use the **Environment** button, then click **Display objects in workflow** in the drop-down menu. In the ensuing pop-up, simply double click the line item labeled **Workflow Tracker** in the Object Name column.

Image


NB04
New message
Find folder
Find document
Appointment calendar
Distribution lists
Workflow 118
Environment Button
Display objects in workflow
Display workflow relationships
Start workflow
Create link
Exe...
Title
Status
Creation Date
Creation ...
P...
Atta...
4601 PA Action - Salary Adjustment (NC) for Dianne Burger19 PCR: 1
04/22/2024 16:31:44 5
4601 PA Action - Salary Adjustment (NC) for Dianne Burger20 PCR: 1
04/22/2024 16:31:36 5
4601 - OM Action Reallocate Position Horizontal for Position - 6500221
04/22/2024 16:31:07 5
4601 - OM Action Reallocate Position Horizontal for Position - 65002219 PCR: 5000002351
04/22/2024 16:30:57 5
4601 - OM Action Reallocate Position Horizontal for Position - 65002220 PCR: 5000002352
04/22/2024 16:30:51 5
4601 - OM Action Reallocate Position Horizontal for Position - 65002221 PCR: 5000002353
04/22/2024 16:30:45 5
4601 - OM Action Reallocate Positi
Choose an object (1)
Restrictions
Number
Object
Object Name
0001
Personnel Action Change Request (PCR)
Dianne Burger15 PCR:1000005720
0002
PCR/OM Request list of approvers
Workflow Tracker
0003
Office Document
Salary Adjustment
3 Entries found

Or, on the **Decision Step** screen, there will be an area labeled **‘Objects and Attachments’** with two or more hyperlinks on the bottom right. The Workflow Tracker will always be the link on the bottom.

Image



Once open, the Workflow Tracker has two sections: **Heading** and **Routing Table**.

Heading Section

The Heading section is at the top of the Workflow Tracker and includes many useful pieces of information including the current status and approval level. Below is a description of each data field and what it represents:

- **Request ID** – The 10-digit PCR number (Personnel/Position Change Request). PA PCRs will start with a '1' while OM items start with a '5'.
- **Status** – This is the overall status of the workflow item and can be one of 6 values.
  - **Created (D)** – The PCR has been saved by the initiator but has not yet been sent to workflow
  - **In Process (N)** – The PCR has been sent to workflow but has not yet been reviewed by an approver.
  - **Approved (A)** – The most recent action taken on this request is approval. It does not indicate that all necessary approvals have been attained.
  - **Rejected (R)** – The PCR has been sent back to the initiator for further review.
  - **Canceled (C)** – After receiving the PCR back in their inbox, the initiator has chosen to cancel the workflow request.
  - **Completed (M)** – The workflow item is completed.
- **Approval level** - The approval level indicates which group of approvers currently has the responsibility to review and act upon the PCR. The six below are the pre-completion, non-error levels within which most PCRs are found.
  - **DA1 (Division Approval)** – This is an optional level which some agencies have elected to implement, and others have not. Division Approvers will work within the same agency as the initiator.
  - **AA1 (Agency Approval)** – Every single PCR, in both OM and PA will need review by an Agency Level approver. These approvers will work in the same agency as the initiator.
  - **OA1 (OSHR Approver)** – An OSHR approver works at the Office of State Human Resources. The only PA action/reason combination that OSHR needs to approve is a Separation/Pay in lieu of notice (ZG/21). OSHR does not approve any OM actions.
  - **BA1 (OSBM Approver)** – An OSBM approver works at the Office of State Budget and Management. The only action reviewed at this level is a request to create a non-temporary new position.

    - **FA1 (Funding Approver)** – Most actions require funding approval, though not all. A Funding Approver will work at the same agency as the initiator.
    - **SOM (OM Shared Services Processing)** – Better known as BEST Shared Services. These approvers work at OSC and are the last step for all OM requests.
- **Action Type** - The technical code and text of the requested action. (For OM PCRs, this field will simply be labeled 'Action')
- **Reason** – Contains the Reason for the proposed PA action. OM PCRs will not have this field.
- **Agency** – The personnel area and name of the agency originating the request.
- **Org. Unit** – The number and name of the organizational unit containing the subject position.
- **Creator** – The personnel number and name of the initiator of the action.
- **Employee** – The personnel number and name of the employee who is the subject of the proposed PA action. (This field does not exist for OM PCRs.)
- **Position** – The number and name of the relevant position.

Image



(The screenshot above is from the training database and does not reflect actual records in the Integrated HR-Payroll System.)

Routing Table

The routing table displays the history of the Workflow item, and if it is not in completed status will show the remaining levels of approval required. It will also indicate the names of the approvers who will have or who may have had access to the workflow item. Below is a description of the columns displayed in the routing table.

- **Seq** – (Sequence) Three-digit numbers are associated with approvers and convey the order in which the PCR will proceed. A single digit number will indicate a touch of the PCR by the initiator.
- **Role** - The approval level, such as Agency Approver or Funding Approver, is indicated in the role column. A key to the codes in this column can be found behind the matchcode button in the Approval Level field in the Heading section.
- **Agent ID** – This column contains personnel numbers of the initiator and approvers in the Workflow process.
- **Name/Description** – The name of the employee associated with personnel number in the Agent ID column.
- **Act** – (Action) A single letter key indicating the action taken by the person listed in the Agent ID & Name/Description columns. They are described in Desc bullet item.
- **Desc** – (Description) Indicates the action taken by the person listed in the Agent ID & Name/Description columns. There are 5 possible values:
    - **P – Processed**: Associated with the Initiator level and indicates that the request has been sent to workflow.
    - **A – Approved**: Indicates that the approver on the same line has approved the PCR to go to the next step.
    - **R – Rejected**: Indicates that the approver on the same line has sent the PCR back to the initiator for review.
    - **O – N/A**: Once an approver either approves or rejects a workflow item, all other approvers at the same level will have this indication.
    - **Blank** – Indicates that no one at this level of approval has taken action on the PCR.
- **Cmnt** – (Comment) When a PCR is rejected, the approver is required to furnish a note for the initiator to review. The existence of the note is indicated by an X in this column. To read, highlight the line with the gray box on the left of the line and click the Notes button at the bottom of the screen.

- **Actual** – When an initiator or approver takes action on a Workflow item, their personnel number appears here.
- **Name** - When an initiator or approver takes action on a Workflow item, their name appears here.
- **Act Date/Act Time** – (Action Date/Action Time) Indicates when the PCR left the inbox of the approver or initiator on the same row. It indicates when the workflow item was Processed, Approved or Rejected.
- **CR Date/CR Time** – (Creation Date/Creation Time) Indicates when the PCR arrived in the inbox of the approver or initiator on the same row.
- **Miscellaneous** – The rest of the columns in the Routing Table can be safely disregarded.

Image

Seq	Role	Mand	Ptype	Atype	Agent ID	Name / Description	Act	Desc	Cmnt	Actual	Name	ACT DATE	ACT TIME	CR DATE	CR TIME	PCRNO
1			P	P	80000021	Terrence Patel	P	Processed		80000021	Terrence Patel	04/22/2024	16:27:13	04/22/2024	16:27:13	50000023
100	FA1	X	A	P	80000024	James Matthews	O	N/A				04/22/2024	16:29:54	04/22/2024	16:27:13	5000002
100	FA1	X	A	P	80001063	Earl Gutierrez01	A	Approved		80001063	Earl Gutierrez01	04/22/2024	16:29:54	04/22/2024	16:27:13	5000002
100	FA1	X	A	P	80001064	Earl Gutierrez02	O	N/A				04/22/2024	16:29:54	04/22/2024	16:27:13	5000002
100	FA1	X	A	P	80001065	Earl Gutierrez03	O	N/A				04/22/2024	16:29:54	04/22/2024	16:27:13	5000002
100	FA1	X	A	P	80001066	Earl Gutierrez04	O	N/A				04/22/2024	16:29:54	04/22/2024	16:27:13	5000002
100	FA1	X	A	P	80001067	Earl Gutierrez05	O	N/A				04/22/2024	16:29:54	04/22/2024	16:27:13	5000002
100	FA1	X	A	P	80001068	Earl Gutierrez06	O	N/A				04/22/2024	16:29:54	04/22/2024	16:27:13	5000002
100	FA1	X	A	P	80001069	Earl Gutierrez07	O	N/A				04/22/2024	16:29:54	04/22/2024	16:27:13	5000002

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