

PER-37 PA Tips and Tricks

Purpose

The purpose of this job aid is to be a companion job aid to the Personnel Administration-Business Process Procedures (PA-BPP).

Reference it prior to following any PA BPP instructions.

CRITICAL!

PA Actions: When processing a PA Action in SAP (this means the PCR has gone through the approval process successfully, returned to the Initiator's/Requestor's inbox, and been opened by the Initiator/Requestor). Let the system guide you through ALL screens. Each Action will have a different number of screens, potentially in a different order. Each screen represents an infotype, such as address information, objects on loan, or benefits information. If you exit the Action prior to processing all of the screens SAP presents, all data required for that Action will not have been entered and saved. Let SAP bring you all the way to the front screen of the Action as a signal that all infotype data required by that Action has been entered, prior to clicking Complete on the PCR workflow item.

When processing a PA Action in SAP, on each infotype screen the system presents, review the information for accuracy and click Save even if nothing has changed. SAP will dynamically pre-fill data in some fields based on data entered on previous infotype screens (to reduce the amount of data required to be entered), but this pre-filled data will not be saved if the Next Record button is clicked without stepping through each screen.

When processing a PA Action in SAP, the header date may be different than the date within the body. The header date reflects the information as the system knows it before the new Action has been saved, and the body date reflects the new date to take effect once the Action has been saved.

Observe the title at the top of any infotype screen. If the word Create is included in the title, the infotype is being created on this person's record for the first time. If the word Copy is included in the title, a copy has been made of the original Action record, delimiting the original or previous record and saving the new record. All historical records are saved within the system, with dates to reflect when they were active. Use the Overview button to display any historical records on an infotype. Double-click or click Choose on any individual record to view the details.

Prior to starting the New Hire process from within workflow, display the position to ensure it is still vacant. Use transaction code PPOSE or PO13D to display the position. Not all will have access to PO13D.

Best Practices

- Write the personnel number and PCR# on the HR package or form for reference in the future.
- Click or press Enter on the keyboard to validate data after entry. This is helpful prior to saving or moving to the next screen – the system will validate the entered data and provide information if any of the data is in an incorrect format or missing. The system will not validate whether you have entered the correct data from a business angle, such as which position entered – only that the position has the correct number of characters, etc.
- Save: Before exiting the system, click Save to validate and save all edits/changes made to the data. This will not only validate the data has been correctly entered (not that the correct number was chosen, but that it was entered in the correct format), but also save the data and incorporate it within the SAP system. SAP is a live system; the data is available to others as soon as it has been saved.

Functionality

- Numbers can be entered without hyphens, such as social security numbers and telephone numbers.
- Personnel actions are date sensitive. Dates can be entered for an event in the future and will not take effect until that date but will show in the system as soon as they are entered (future-dated actions will not be visible unless searched within that date range – the default date range for searches is the current date).
- Notes can be attached to the PCR to aid in the approval decisions by those in the approval workflow chain. These notes will not transfer to the Action but can be copied and pasted into new notes within the Action.
- Effective date is the date employee “enters on duty.” If the first of the month falls on a non-work day and the employee starts to work on the first available workday, the effective date would be on the first.
 - *Example:* 5/1/11 was on a Sunday, and the employee started work Monday, 5/2/11. The employee’s effective date would be 5/1/11.

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