PER-57 Copying Notes from the PCR to Infotypes

Purpose

The purpose of this Business Process Procedure is to explain how to copy notes from the PCR to Infotypes.

Trigger

The PCR is ready to be executed. The notes/comments on the PCR need to be copied to the applicable Infotypes.

Business Process Procedure Overview

PA Actions need approval before the Action can be executed. The Integrated HR-Payroll System Workflow enables approvals (or rejections) to be obtained electronically. Documentation must be provided to the Approver. In the Integrated HR-Payroll System, you can attach documents to the Workflow as well as write notes.

Note: Keep in mind that the notes and documents associated with Workflow do not move forward automatically when processing the infotypes of the approved workflow document.

When a PCR is created, notes are created utilizing the Services for Objects button. The Services for Objects option allows notes and attachments (Word, Excel, Notepad) to be included with the Workflow PCR. All Approvers at the next levels (unless marked private) can view the notes or attachments. Only the creator of the private note can view it.

When the Initiator receives an approved PCR in his/her Inbox, it is ready for processing.

By using the Header, you can access the Services for Object button to see any notes or attachments that were created with the PCR.

The Initiator can access the comments from the Services for Object and copy them to the clipboard which services as a holding area for the copied notes/comments. Once the PCR is executed from the Initiator’s Inbox, the notes/comments can then be pasted to the appropriate infotypes.

Access Transaction

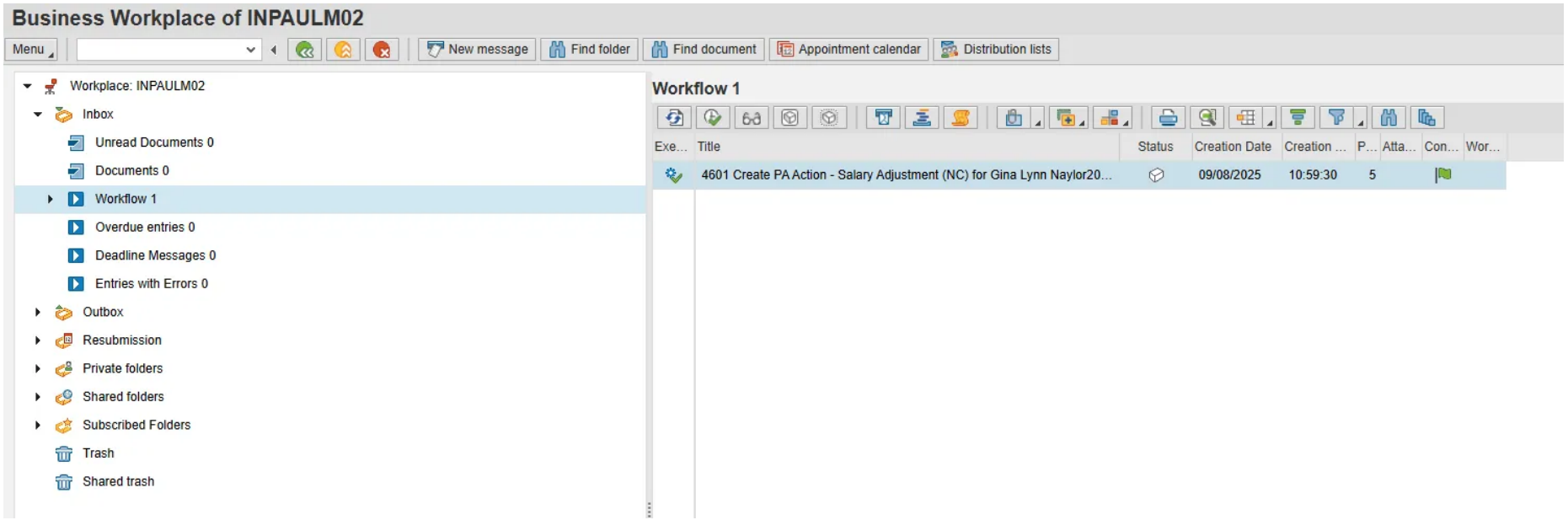
Via Menu Path: SAP Menu > Office > SBWP – Workplace > Inbox > Workflow

Via Transaction Code: N/A

Procedure

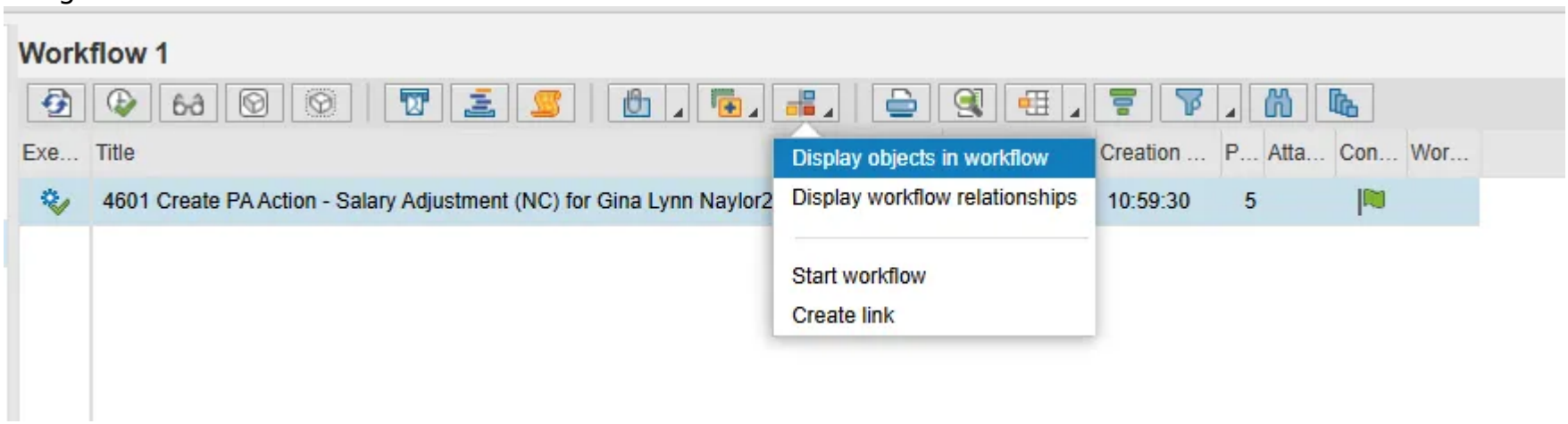
Begin the copy process on the Business Workplace of the Workflow Initiator. There are 17 steps to complete this process.

Image



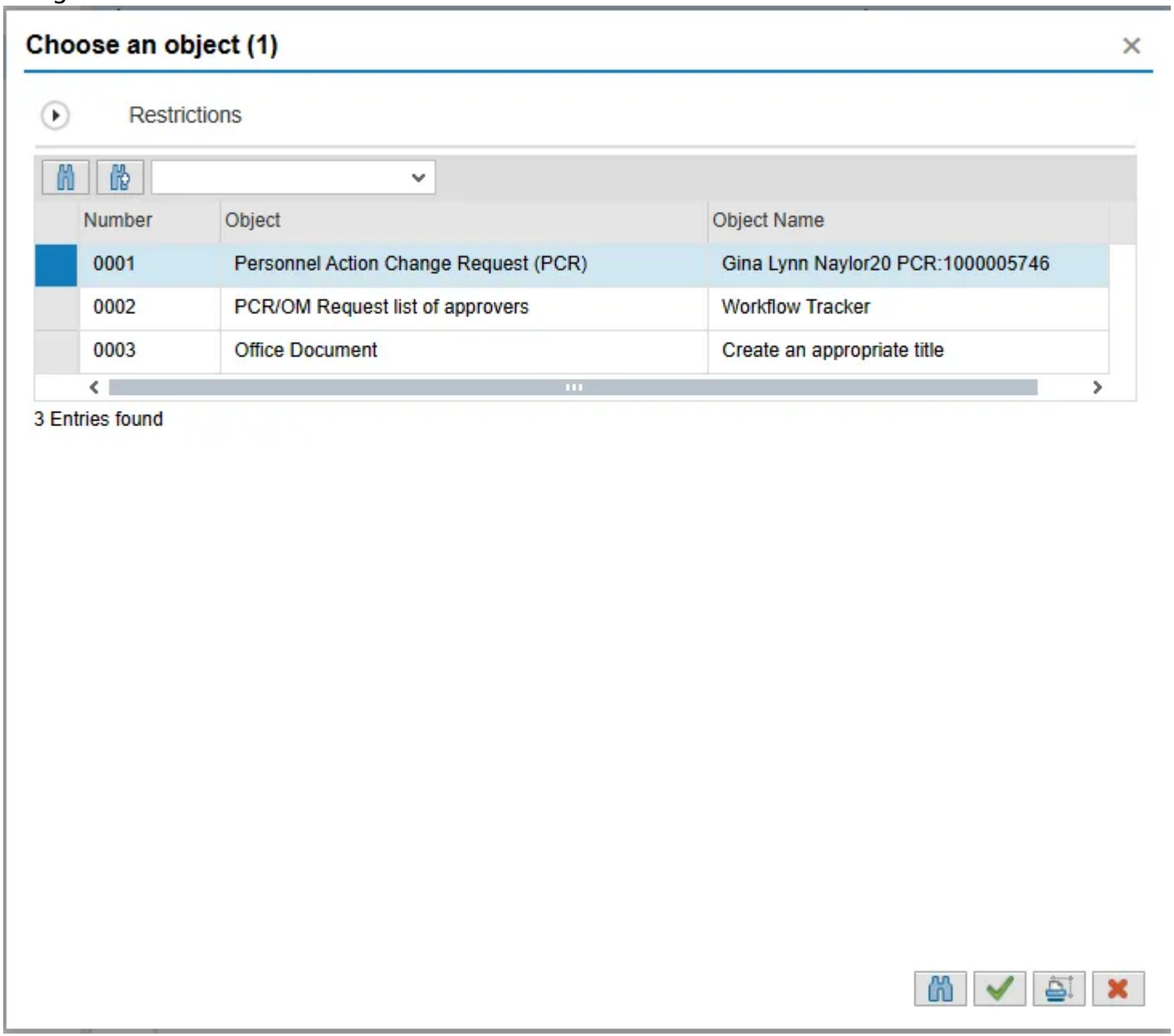
Step 1: Single-click the **PCR** to select it.

Image



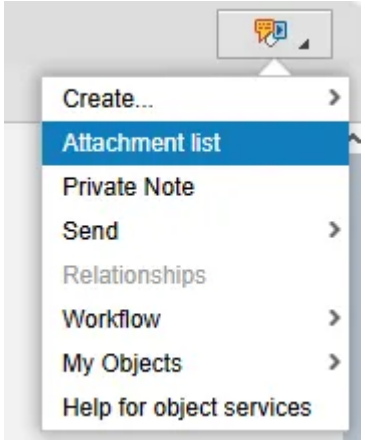
Step 2: Click the Environment button and choose Display objects in workflow from the drop-down menu.

Image


Choose an object (1)
Restrictions
Number
Object
Object Name
0001
Personnel Action Change Request (PCR)
Gina Lynn Naylor20 PCR:1000005746
0002
PCR/OM Request list of approvers
Workflow Tracker
0003
Office Document
Create an appropriate title
3 Entries found

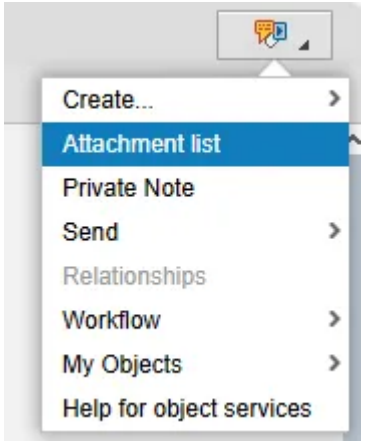
Step 3: Double-click the Workflow Header. It contains the PCR number.

Image



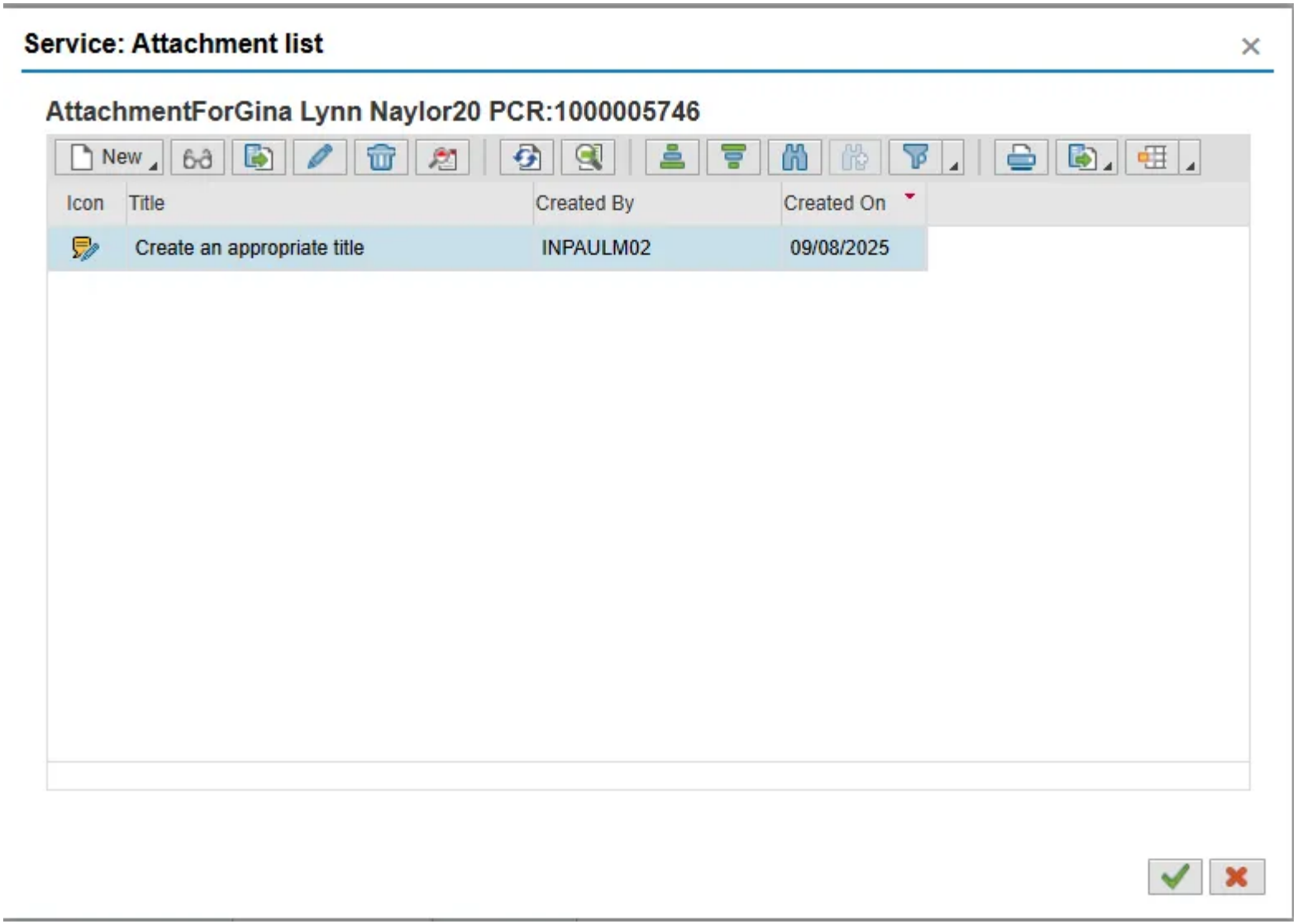
Step 4: Click Services for Object and choose Attachment list from the drop-down menu.

Image



Step 5: Click **Attachment list**.

Image



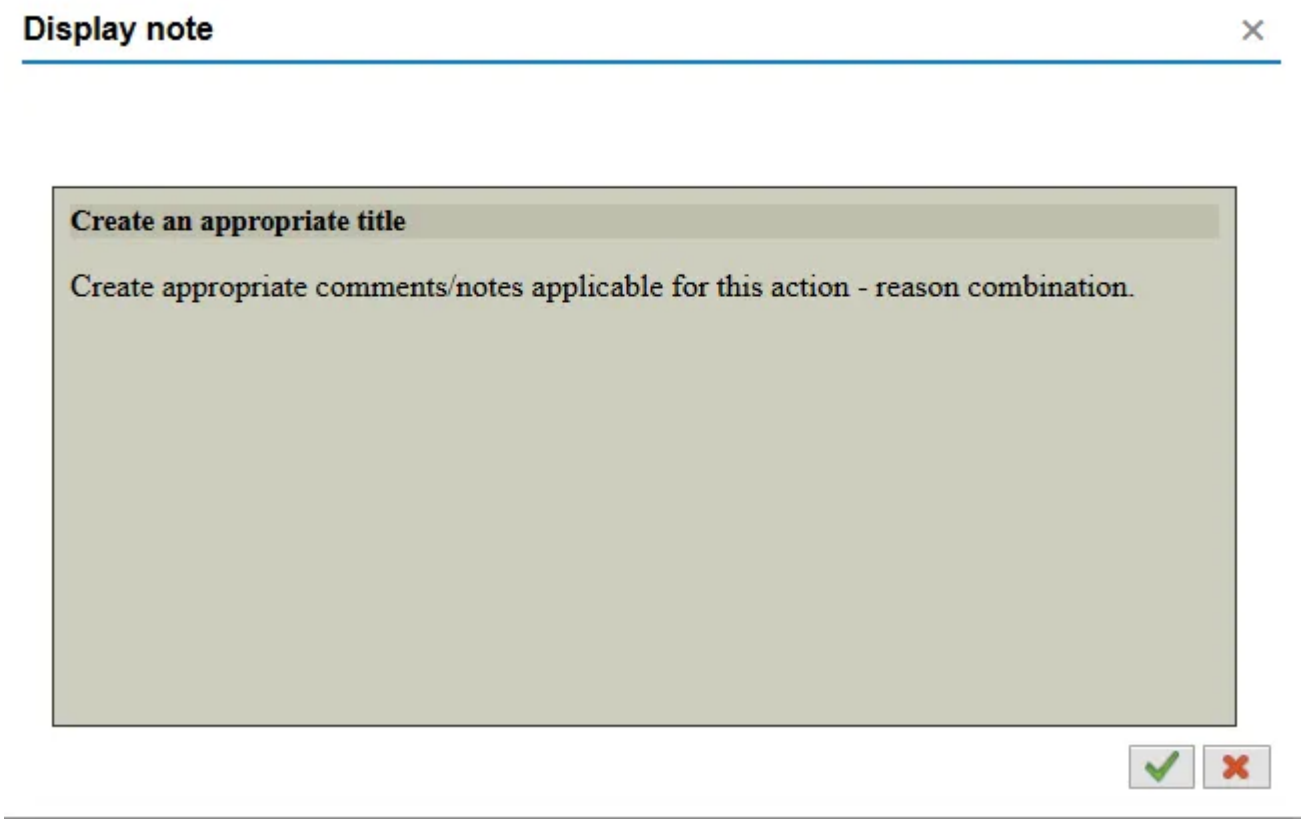
Step 6: Double-click on the desired **attachment**. The attachment is displayed.

Image



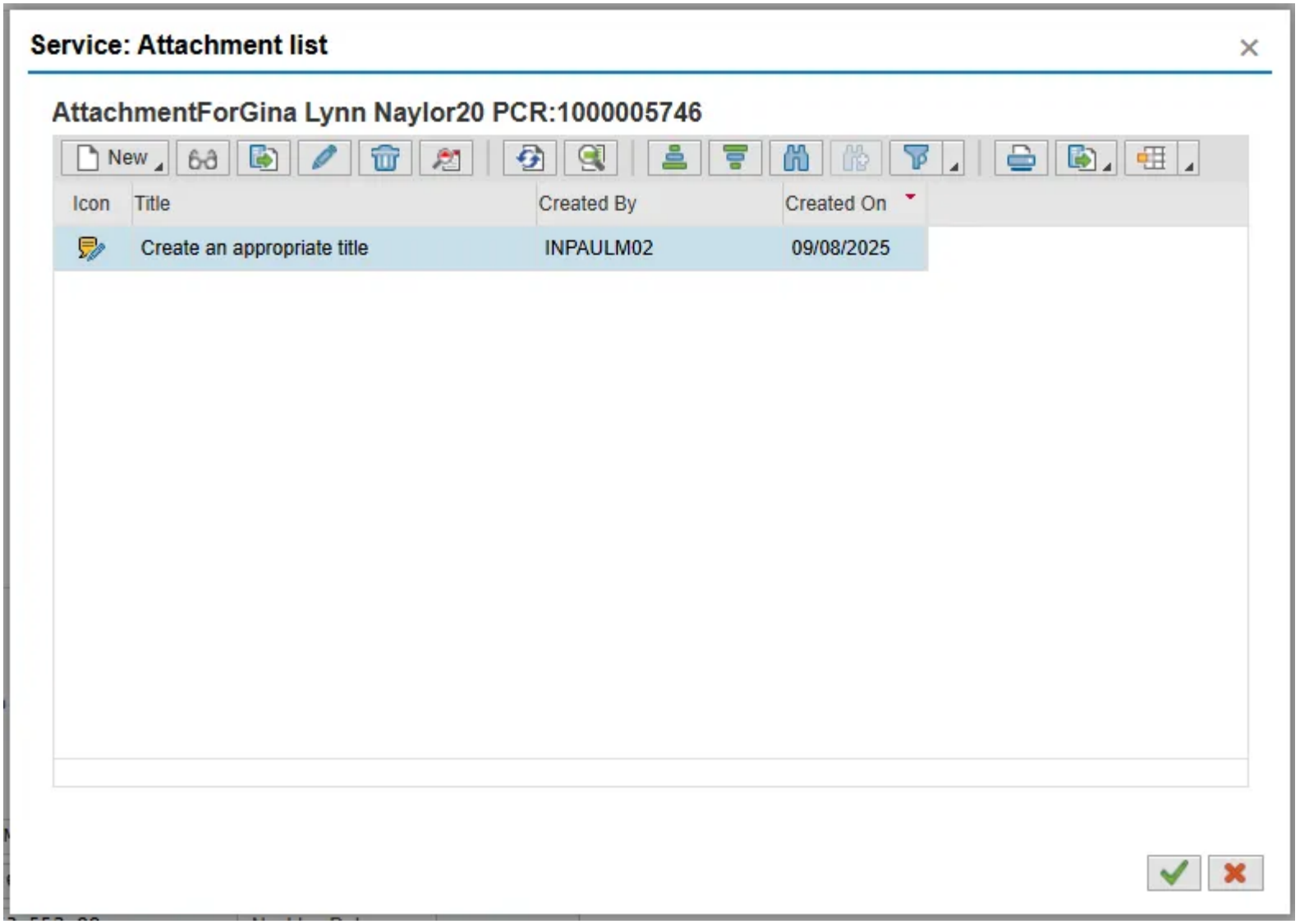
Step 7: Highlight the contents of the note and copy the information to your computer’s clipboard. You can use control + c or right-click copy.

Image



Step 8: Click the **Red X** to close the attachment window.

Image



Step 9: Click the **Red X** again to close the Services for Objects attachment window.

Image

Employee Action Request

Menu

PCR Number	1000005746				
Personnel Number	10000110	Gina Lynn Naylor20	Action:	ZC	Salary Adjustment (NC)
Last 4 digits(SSN)			Reason:	12	In-Range - Higher Level
Effective on	09/08/2025	Chng 09/08/25 INPAULM02	St:	A	Approved

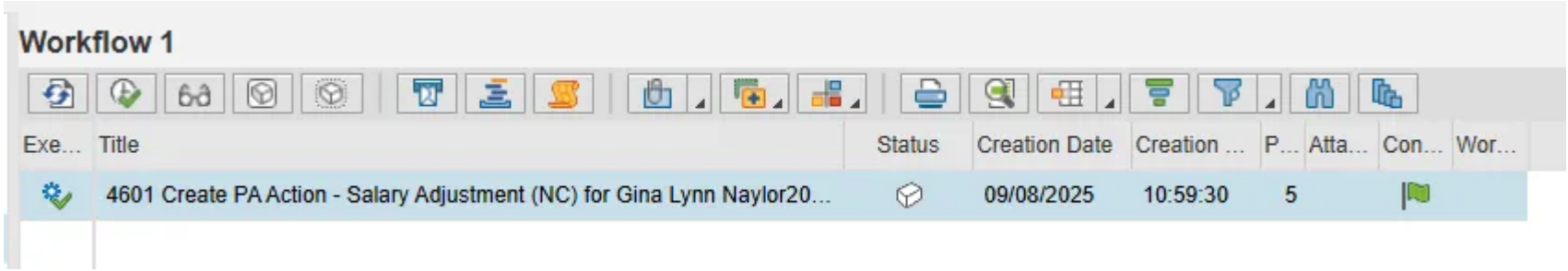
	CURRE...		PROPOS...	
Pers.Area	4601	Natural and Cultural Resources	4601	Natural and Cultural Resources
Subarea	NC01	7day Norm	NC01	7day Norm
EE Group	A	SPA Employees	A	SPA Employees
EE Subgroup	A2	FT N-FLSAOT Prob	A2	FT N-FLSAOT Prob
Org. Unit	20010281	CR CDS ST LIBRARY ADID Te	20010281	CR CDS ST LIBRARY ADID Te
Job	32000330	Systems Consultant	32000330	Systems Consultant
EE Position	65002016	Systems Consultant	65002016	Systems Consultant

Basic Pay

Pay Scale type	07 General		Pay Scale type	07 General	
Pay Scale Area	01 Annual Salaries		Pay Scale Area	01 Annual Salaries	
Pay Scale Group	GN12	Level 01	Pay Scale Group	GN12	Level 02
Annual Salary	51,000.00	Hrly Sal 0.00	Annual Salary	56,220.00	Hourly Salary 0.00
	Calc Step - -MP			Calc Step - MIN	10.24
			Min	56,220.00	
			Max	63,552.00	Next Inc Date

Step 10: Click **Green back arrow** to return to the PCR.

Image



Step 11: Double-click the **selected PCR** or click on the **Execute** button.

Image

Personnel Actions

Menu

Personnel no.	10000110				
Name	Gina Lynn Naylor20				
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A2	FT N-FLSAOT Prob	CostC	4699999999	CULTURE RESOURCES
From	09/08/2025				

Personnel Actions

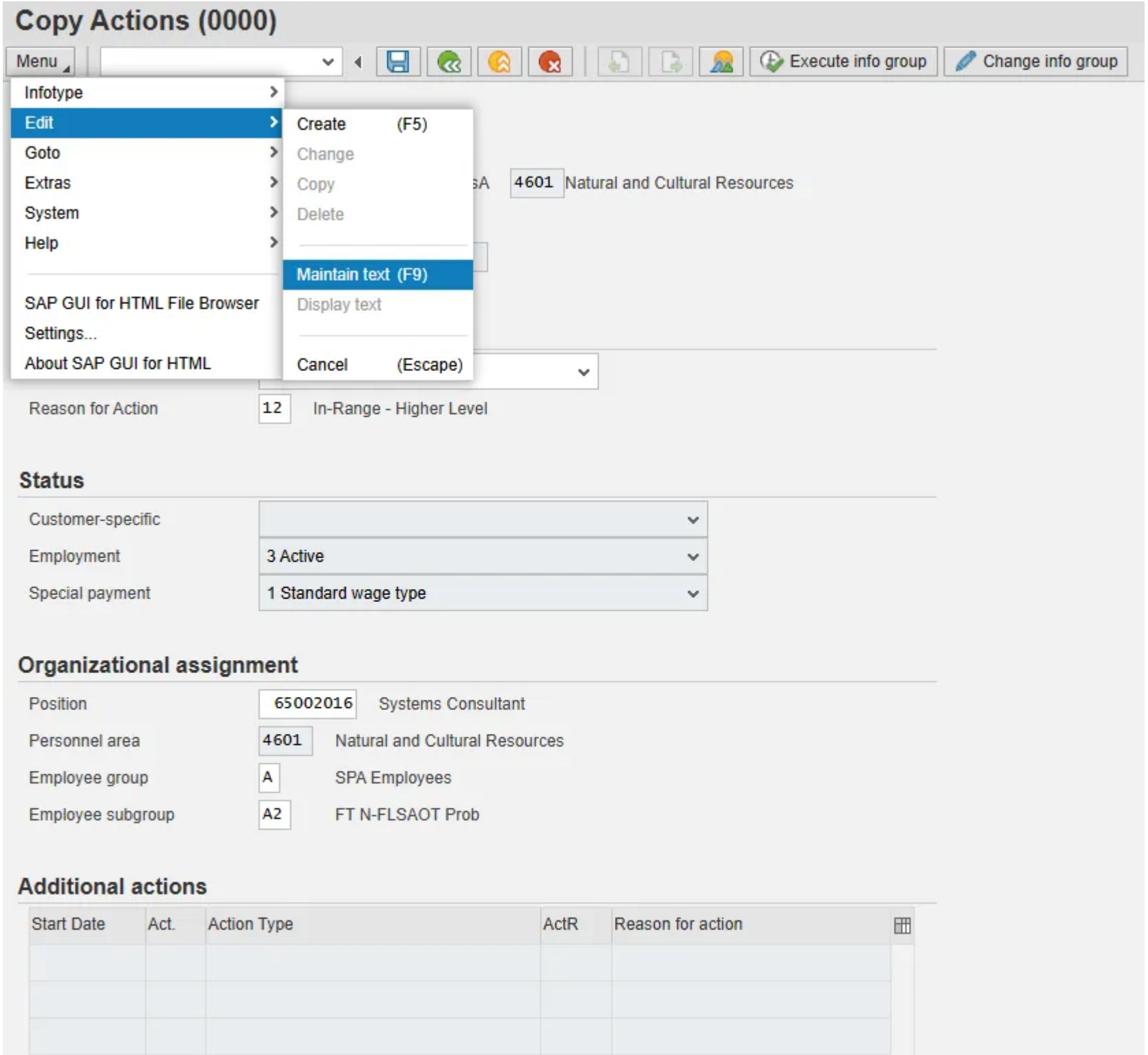
Action Type	Personne...	EE group	EE subgr...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion (NC)			
Salary Adjustment (NC)			
Cancel Salary Adjustment(NC)			
Range Revision (NC)			
SeparationPayContinuation(NC)			

Step 12: Enter the **effective date** of the action in the From field (should be same as PCR).

Step 13: Click on the gray box to the left of the **action** you wish to process. (This example uses the Salary Adjustment action.)

Step 14: Click the **Execute** button. The Actions infotype is displayed.

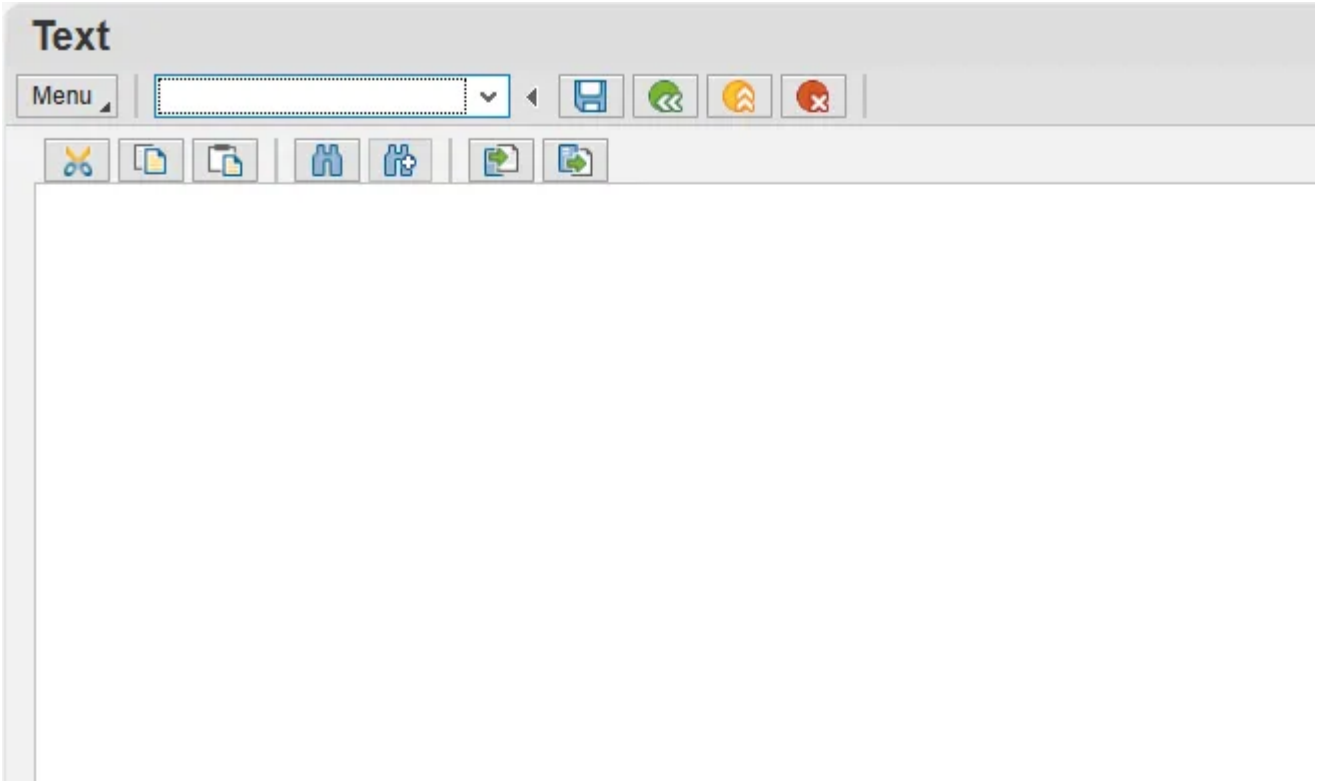
Image


Copy Actions (0000)
Menu
Execute info group
Change info group
Infotype
Edit
Goto
Extras
System
Help
SAP GUI for HTML File Browser
Settings...
About SAP GUI for HTML
Create (F5)
Change
Copy
Delete
Maintain text (F9)
Display text
Cancel (Escape)
4601 Natural and Cultural Resources
Reason for Action
12 In-Range - Higher Level
Status
Customer-specific
Employment
3 Active
Special payment
1 Standard wage type
Organizational assignment
Position
65002016 Systems Consultant
Personnel area
4601 Natural and Cultural Resources
Employee group
A SPA Employees
Employee subgroup
A2 FT N-FLSAOT Prob
Additional actions
Start Date
Act.
Action Type
ActR
Reason for action

Step 15: Click **Menu > Edit > Maintain text**. A dialog box is displayed.

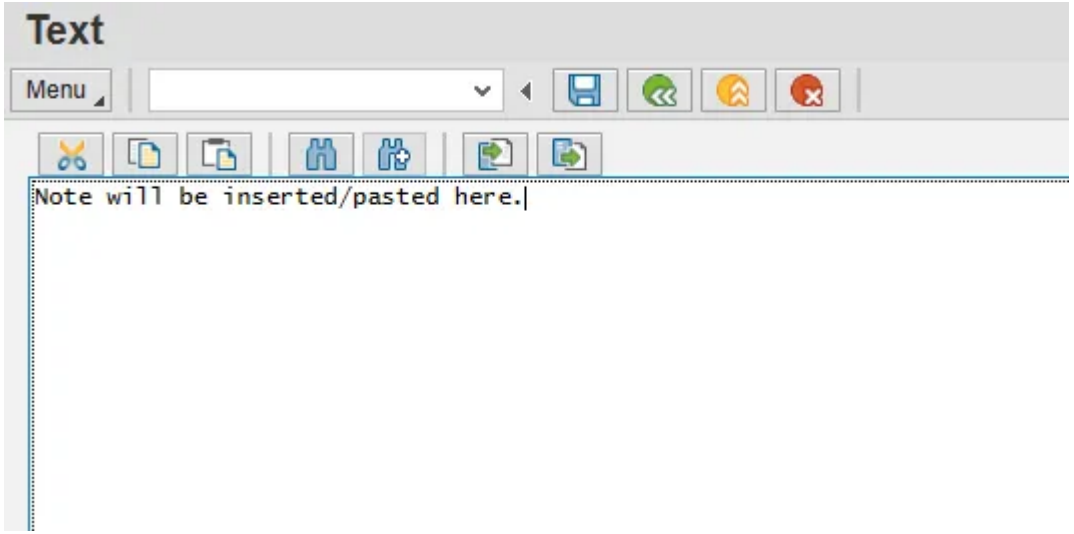
Note: If the dialog box screen does not display, try clicking Enter until it displays.

Image



Step 16: In the text box area, right-click and select **Insert Text**. Text is pasted into the text box.

Image



Step 17: Click the **Save** button. The Actions infotype screen displays again, now with an icon indicating that there are comments attached to this infotype.

Image



Continue processing the Action. Add notes to other infotypes as appropriate.

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