



PA WORKFLOW APPROVAL

WF-9 | TRANSACTION SWBP

WF

The purpose of this Business Process Procedure is to explain the PA Workflow Approval process in the Integrated HR-Payroll System.

Trigger: A PCR (Personnel Change Request) workflow item has arrived in your SAP Inbox for review and approval.

Business Process Procedure Overview:

All PCRs initiated/requested via workflow will go through an approval process. Depending on the action being processed (type of personnel action such as New Hire or Separation), different levels of approval are required. The levels of approval may include Division, Agency, OSHR or Funding.

Review the data within the PCR, add any comments as appropriate using the Services for Objects functionality (notes/attachments/URLs), and either approve or reject the PCR. If you approve the PCR, it will be sent to the next defined stage of the approval process. If you are the last stage in the approval process, the PCR will be returned to the initiator/requestor for subsequent processing. If you reject the PCR, you are required to enter comments as to the reason for rejection, and the PCR is returned immediately to the initiator/requestor for adjustments and resubmission, or cancellation.

Tips and Tricks:

SAP Business Workplace Inbox Functionality

- The SAP Business Workplace inbox is where all workflow documents will be initiated/requested, and where all workflow documents will arrive for approvers to review and respond.
- In the SAP Business Workplace, workflow documents are SAP messages that are created and read similar to any outside emailing system (MS Outlook, etc.).
- For more information on the SAP Business Workplace, including an overview of all Tree Functions (folders, organization of the workplace), see the Business Workplace Overview Tree Functions Job Aid on the OSC Training Help website. (See Additional Resources section at the end of this document.)

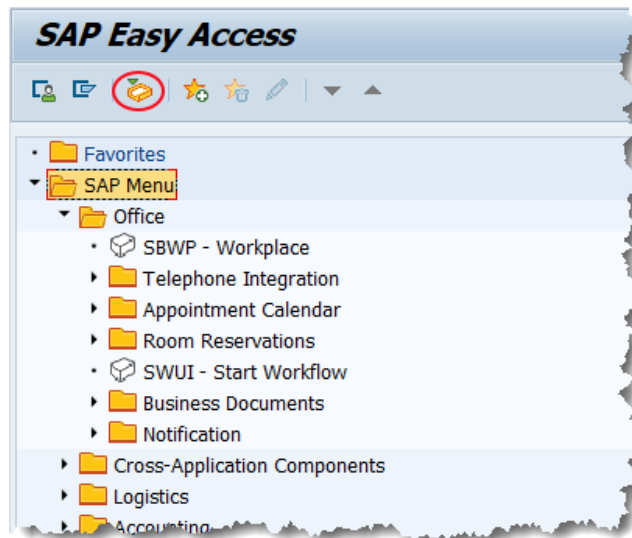
Access Transaction:


Via Menu Path: SAP menu>>Office>>SBWP – Workplace

Via Transaction Code: SBWP

Procedure

1. Click the **SAP Business Workplace**  button.



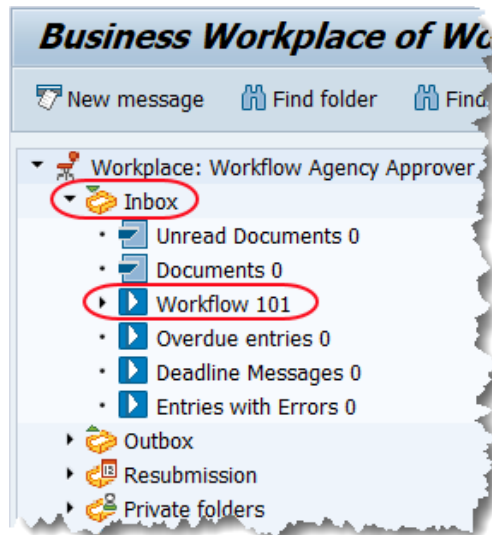



Information

Inbox Functionality (SAP Business Workplace)

- SAP’s inbox and can be accessed by clicking on the SAP Business Workplace button, or by entering transaction code SBWP in the Command Field.
- Workflow documents are SAP messages that are created and read similar to any outside emailing system (MS Outlook, etc.).
- For more information on the SAP Business Workplace, including an overview of all Tree Functions (folders, organization of the workplace), see the Job Aid “[Business Workplace Overview Tree Functions.](#)”

2. Select **Inbox >> Workflow**.



3. Identify and double click the PCR which needs your attention. In the below example, we will be using PCR 100005396. (You can also single click the PCR and then click the Execute  button.)

Business Workplace of Workflow Agency Approver


New message Find folder Find document Appointment calendar Distribution lists

Workplace: Workflow Agency Approver

- Inbox
 - Unread Documents 0
 - Documents 0
 - Workflow 101**
 - Grouped according to content
 - Grouped according to content type
 - Grouped according to sort key
 - Grouped according to task
 - Overdue entries 0
 - Deadline Messages 0
 - Entries with Errors 0
- Outbox
- Resubmission
- Private folders
- Shared folders
- Subscribed Folders
- Trash
- Shared trash

Workflow 101

Exe..	Title	Status	Creation Date	Creation Ti...	P	Atta...	Con...	Wor
	4601 PA Action - Salary Adjustment (NC) for Dianne Burger19 PCR: 1000005455		01/13/2017	16:12:03				5
	4601 PA Action - Salary Adjustment (NC) for Dianne Burger20 PCR: 1000005456		01/13/2017	16:12:47				5
	4601 PA Action - Salary Adjustment (NC) for Melissa Lee Fitzgerald PCR: 1000005396		03/28/2016	09:40:14				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez02 PCR: 1000005418		07/07/2016	12:59:29				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez03 PCR: 1000005419		07/07/2016	13:01:13				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez04 PCR: 1000005420		07/07/2016	13:02:45				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez05 PCR: 1000005421		07/07/2016	13:04:16				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez06 PCR: 1000005422		07/07/2016	13:06:00				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez07 PCR: 1000005423		07/07/2016	13:06:54				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez08 PCR: 1000005424		07/07/2016	13:09:50				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez10 PCR: 1000005426		07/07/2016	13:14:56				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez11 PCR: 1000005427		07/07/2016	13:16:06				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez12 PCR: 1000005428		07/07/2016	13:17:09				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez13 PCR: 1000005429		07/07/2016	13:18:36				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez14 PCR: 1000005430		07/07/2016	13:20:19				5
	4601 PA Action - Salary Adjustment (NC) for Nancy Gonzalez15 PCR: 1000005431		07/07/2016	13:27:02				5

 **Information**

PCR List:

- All columns can be sorted and adjusted based on your personal preference for viewing the data.
- Execute** column – you can either click the Execute button to enter a PCR for processing, or double-click anywhere on the PCR line.
- Title** column
 - Agency**
 - Type of action** (what it is requesting)
 - REJECTED** = this PCR has been rejected
 - PCR #**
 - Personnel #** (if applicable)
- Status** column – contains the reserved box – if it is white, everyone within the approval bucket can view the PCR in their inbox; if it is gray/blue or if it has a flag in it, you have reserved this PCR, and no one else can see it in their inbox (until you release it)
- Creation Date** – the date the PCR appeared in the inbox
- Creation Time** – the time of day the PCR appeared in the inbox
- Priority** – the priority of the PCR set by the approvers. Initiators do not have the ability to set the priority unless it has returned to their inbox for further processing. Approvers can set priority for workflow items in their inbox. Once the priority is set, all approvers will see the priority assignment for a workflow item. By default, all workflow items are set to “5” Medium. Priorities are a global setting and are denoted with a color ledger.
 - Highest – Express
 - Very high
 - Higher
 - High

5. Medium
6. Low
7. Lower
8. Very low
9. Lowest

4. Click on the **Workflow Header**. It is always the second link from the bottom in the 'Objects and attachments' area.

Decision Step in Workflow

Workflow Create Import

4601 PA Action - Salary Adjustment (NC) for Melissa Lee Fitzgerald PCR: 1000005396

Choose one of the following alternatives

- Approve Change
- Return to the Initiator
- Cancel and keep work item in inbox

Description
 Workflow status: In Process
 See Attachments/Notes in PCR document.
 Please review the information in this screen and make one of the following choices:
 Approve change - the request will continue onto the next approver or processor.

Objects and attachments

- Object Attachment: Salary Adj. for Melissa Fitzgerald, eff. 04/01/26
- Object Attachment: Title of note
- PA PCR: Melissa Lee Fitzgerald PCR:1000005396
- PCR List: Workflow Tracker

Workflow Header (with arrow pointing to the 'Workflow Tracker' link)

5. Review the PCR details as appropriate.

System Help

Employee Action Request


PCR Number: 1000005396
 Personnel Number: 10000112 Melissa Lee Fitzgerald
 Last 4 digits(SSN):
 Effective on: 04/01/2016 Chng: 03/28/16 ZWFINOMPA191 St: N In Process
 Action: ZC Salary Adjustment (NC)
 Reason: 01 Salary Adjustment

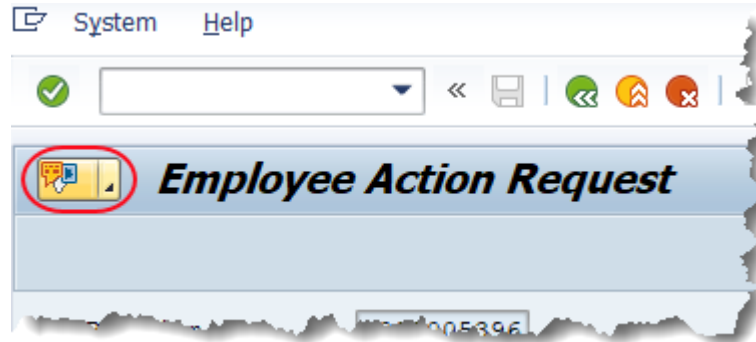
CURRENT		PROPOSED	
Pers.Area	4601 Natural and Cultural Resources	Pers.Area	4601 Natural and Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgrp	A1 FT N-FLSAOT Perm	EE Subgrp	A1 FT N-FLSAOT Perm
Org. Unit	20010126 CR CDS HR OFFICE Human R	Org. Unit	20010126 CR CDS HR OFFICE Human R
Job	30001000 Personnel Analyst I	Job	30001000 Personnel Analyst I
EE Position	60083266 Personnel Analyst I	EE Position	60083266 Personnel Analyst I

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	GR70 Level GR	Pay Scale Group	GR70 Level GR
Annual Salary	40,250.00 Hrly Sal 0.00	Annual Salary	44,500.00 Hourly Salary 0.00
Calc Step	--MP	Calc Step	--MP 10.56
Min	39,632.00	Min	39,632.00
Max	63,372.00	Max	63,372.00
		Next Inc Date	

Note: The particular items which need review will vary based on the action & reason combination. The employee’s current data are on the left side of the screen whereas the proposed new data are on the right. Some action/reason combinations will also have multiple tabs of data for review.

- Click the **Services for Objects**  button.

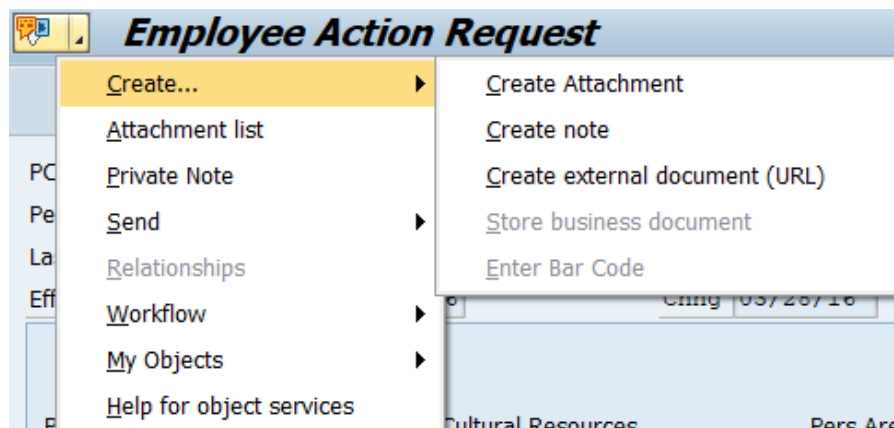


Services for Objects are available on all Personnel Administration actions and allows you to link critical business documents to the PCR or an action. You may add notes, attachments, or hyperlinks on a PCR and/or an action, but the items added on any PCR will not transfer automatically to the related action. You must copy and paste the notes or re-add the attachments or hyperlinks on the action once the PCR has been completed.

- If a note, attachment or URL has been added, the **Attachment list** option will be live (it is grayed out in the list if there are no attachments). Click on **Attachment list** to view one or more items.
- A **Private note** will be viewable by you only, using your user id. It will follow the PCR or action, but no one else will be able to view it.

Click the right side of the button to get the drop-down menu from the Services for Objects button. Clicking the left side of this button will produce a pop-up bar with buttons having the same functionality as the menu items which are used in this document.

- Hover mouse over **Create >>**

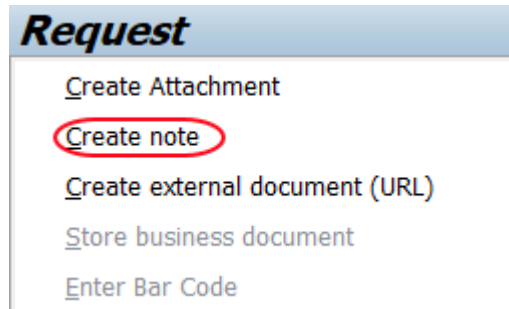


- An **Attachment** can be created by referencing a document within a directory or using the script editor to create a new document within a document type, such as MS Word.

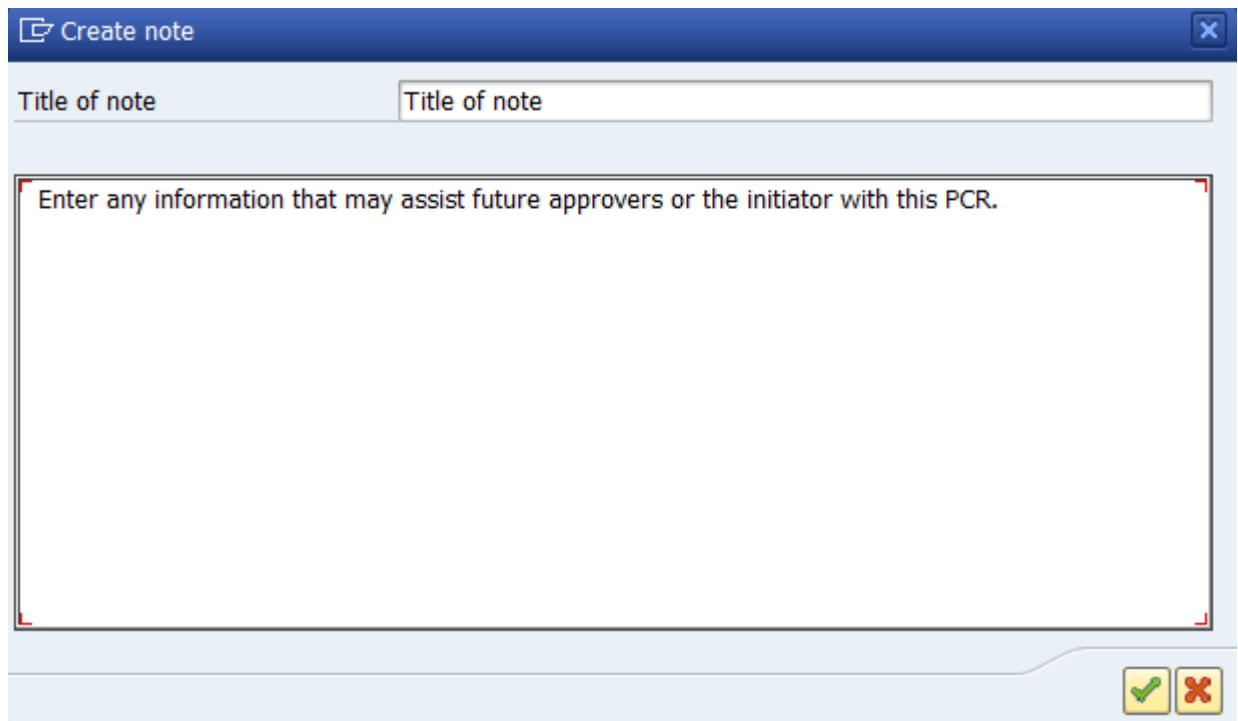
- A **Note** opens a text box for you to enter a title and body of a note. The text can be copied from an email or other document and pasted into the fields. The text cannot be formatted, but there is a lot of room to enter text in the box. The note functionality is created using SAP script (SAP’s coding language).
- An **External Document (URL)** is a hyperlink to a web page, such as to policy or other document.

All notes, attachments or URLs added to PCRs are viewable when displaying the PCR through the SAP inbox. All viewers of the PCR throughout the approval levels will be able to view the Services for Objects items.


8. Click >> **Create Note**



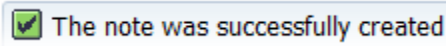
9. Enter in the title of the note as well as any information that may assist future approvers or the initiator with this PCR.



Note: Creating a note as an approver is optional when the PCR is being approved. However if the PCR is being rejected, a note should be created in the PCR’s Services for Object in addition to the one required within the Workflow process.

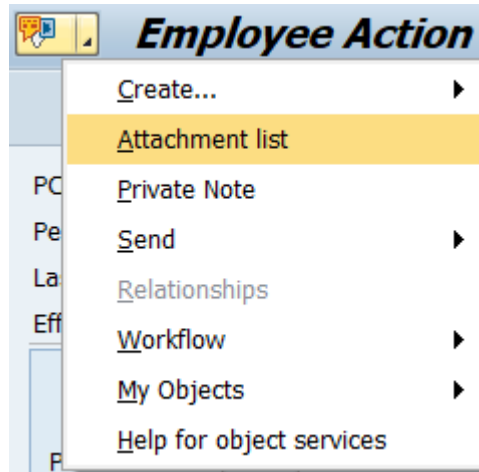
10. Click the Continue  button.

The system indicates that the note/attachment/URL was successfully created with a note on the bottom of the screen:



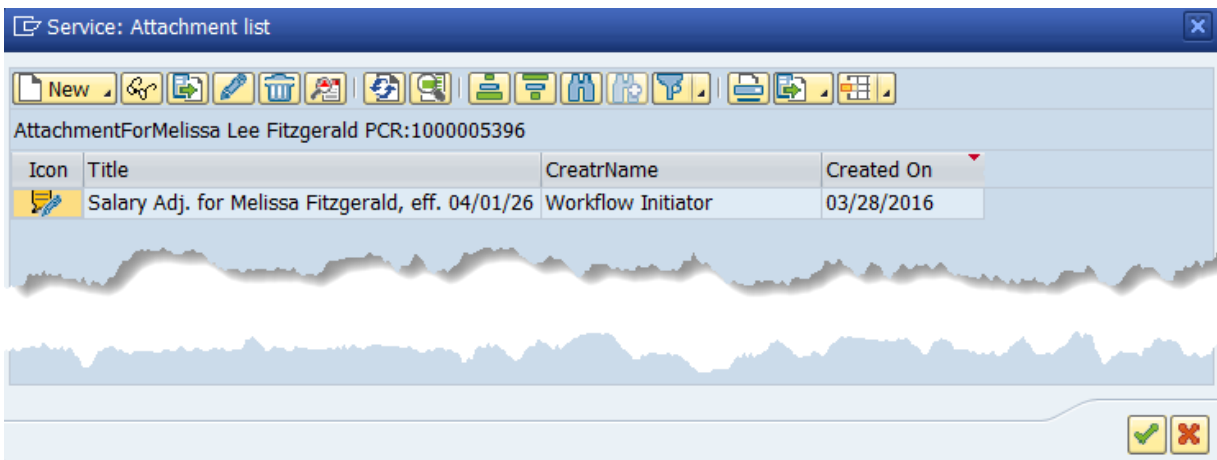
11. Click the **Services for Objects**  button.

12. Click **Attachment List**.



To view a note or attachment that has been added to this PCR, view the items in the **Attachment list**. Double click any item to view its contents.

Review any of the notes/attachments as appropriate and close this window when complete.



13. Click the Continue  button.

14. Click the Back  button.

15. Click the appropriate decision – **Approve Change**, **Return to the Initiator**, or **Cancel and keep work item in inbox**. Descriptions of each decision are below.

Decision Step in Workflow

Workflow
Create
Import

4601 PA Action - Salary Adjustment (NC) for Melissa Lee Fitzgerald PCR: 1000005396

Choose one of the following alternatives

Approve Change	
Return to the Initiator	
Cancel and keep work item in inbox	

<p>Description</p> <p>Workflow status: In Process</p> <p>See Attachments/Notes in PCR document.</p> <p>Please review the information in this screen and make one of the following choices:</p> <p>Approve change - the request will continue onto the next approver or processor.</p> <p>Return to the initiator - the request will be returned to the person creating the request.</p> <p>Cancel and keep work item in inbox - the user decision remains in your inbox for processing.</p> <p>Thank You</p>	<p>Objects and attachments</p> <ul style="list-style-type: none"> Object Attachment: Salary Adj. for Melissa Fitzgerald, eff. 04/01/26 Object Attachment: Title of note PA PCR: Melissa Lee Fitzgerald PCR:1000005396 PCR List: Workflow Tracker
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Approve Change – The PCR will continue onto the next approver or processor. You are returned to your inbox and this PCR now appears in your outbox. The workflow approval process is now complete.

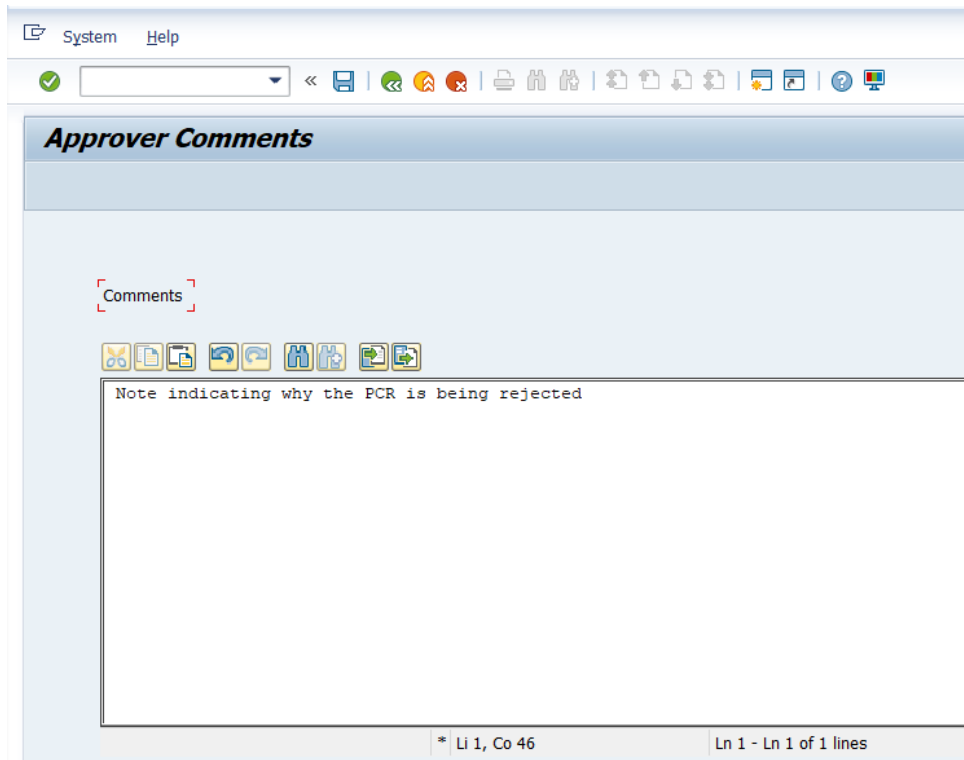
Cancel and keep work item in inbox – Reserves the PCR to your inbox but takes no action on it and you are returned to your inbox. Selecting this option *does not cancel* the actual PCR but allows you to make a decision at a later time.

Return to the Initiator – Rejects the PCR back to the initiator who will then have the opportunity to correct and resubmit or to cancel the PCR altogether. See extra steps below for this decision.

PROCEED WITH THE NEXT STEPS **ONLY IF** THE PCR NEEDS TO BE REJECTED BACK TO THE INITIATOR

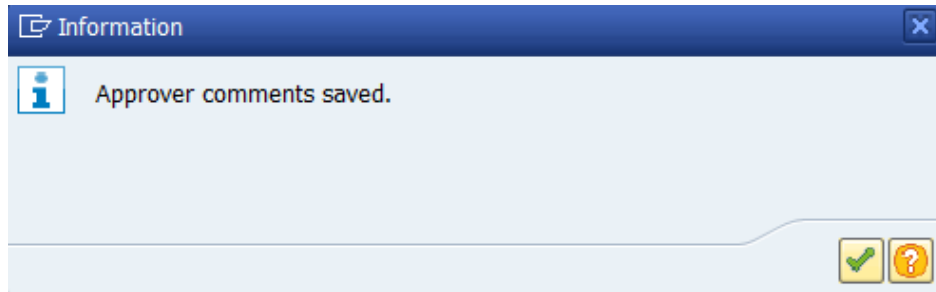
16. Click **Return to Initiator**.

17. Add your mandatory note to the initiator indicating why the PCR is being rejected.



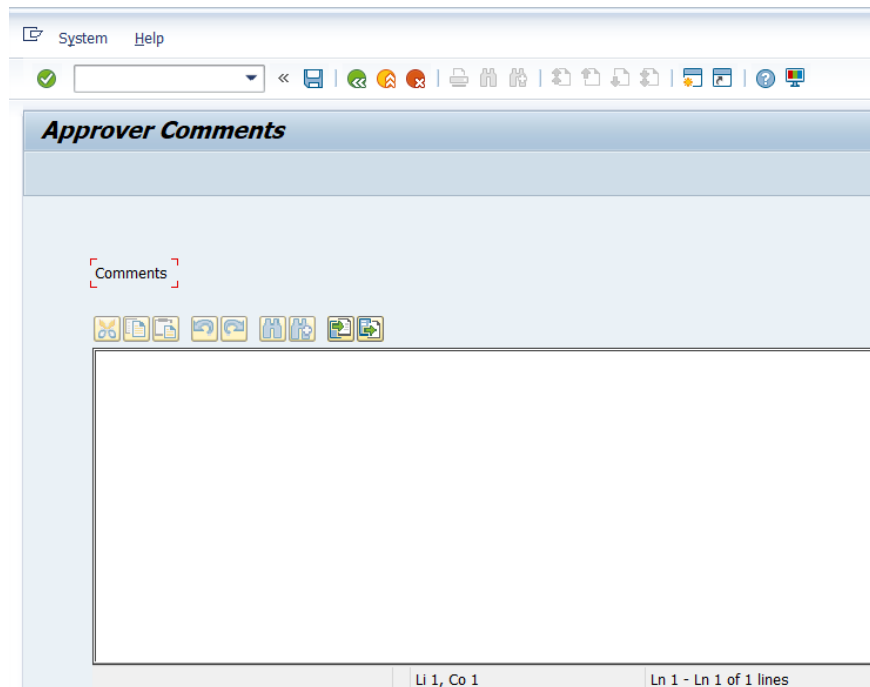
HINT: When you create a note within Services for Object for the rejected PCR, copy it into your clipboard before closing the window. You can then paste it to this screen.

18. Click the **Save**  button.



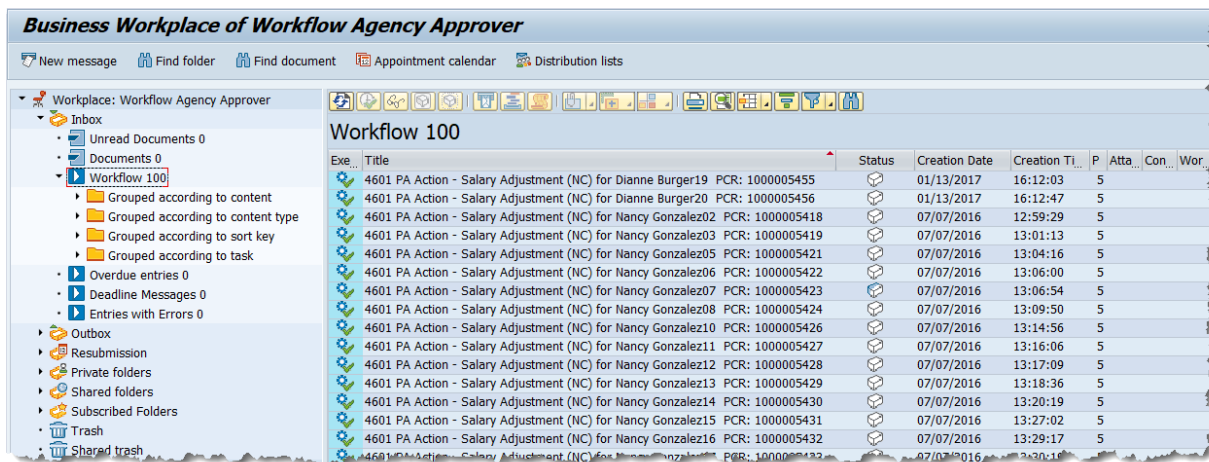
A pop-up will appear indicating that your note has been saved.

19. Click the **Continue**  button.



The note window will reappear with no note in it. This is expected behavior and you **do not** need to type the note again.

20. Click the **Back** button.



You are returned to your inbox and the PCR is now in your outbox. The workflow rejection process is complete.

Additional Information

Workflow Tracker:

The Workflow Tracker is used to view the approval status of the PCR as it moves throughout the workflow process. It displays all of the approvers who will participate in the approval process, the list of all possible approvers for the PCR.

The Workflow Tracker link is available on PCRs within your inbox, PCRs in your outbox and on the decision step screen. It will always be the bottom link in the Objects and attachments area of the screen.

Objects and attachments

- Object Attachment: Salary Adj. for Melissa Fitzgerald, eff. 04/01/26
- Object Attachment: Title of note
- PA PCR: Melissa Lee Fitzgerald PCR:1000005396
- PCR List: Workflow Tracker**

Upon clicking that link, a screen such as this will appear:

Workflow actions

Heading

Request ID	1000005396	Status	R Rejected	Approval Level	IREJ	Awaiting Initiator Resubmission	
Action Type	ZC	Salary Adjustment (NC)		Reason	Salary Adjustment		
Agency	4601	Natural and Cultural Resources		Org. Unit	20010126	CR CDS HR OFFICE Human Res Operations	
Creator	80000021	Terrence Patel					
Employee	10000112	Melissa Lee Fitzgerald		Position	60083266	Personnel Analyst I	

Seq	Role	Mand	Ptype	Atype	Agent ID	Name / Description	Act	Desc	Cmnt	Actual	Name	ACT DATE	ACT TIME	CR DA
1			P	P	80000021	Terrence Patel	P	Processed		80000021	Terrence Patel		00:00:00	
100	AA1	X	A	P	80000023	Priscilla Branco	O	N/A				04/22/2021	11:48:05	03/2
100	AA1	X	A	P	10000113	NO USERID	O	N/A				04/22/2021	11:48:05	03/2
100	AA1	X	A	P	80001043	Carolyn Bracy01	R	Rejected	X	80001043	Carolyn Bracy01	04/22/2021	11:48:05	03/2
100	AA1	X	A	P	80001044	Carolyn Bracy02	O	N/A				04/22/2021	11:48:05	03/2
100	AA1	X	A	P	80001045	Carolyn Bracy03	O	N/A				04/22/2021	11:48:05	03/2
100	AA1	X	A	P	80001046	Carolyn Bracy04	O	N/A				04/22/2021	11:48:05	03/2
100	AA1	X	A	P	80001047	Carolyn Bracy05	O	N/A				04/22/2021	11:48:05	03/2

The Header section includes:

- PCR number (Personnel Change Request)
- Status – the overall status of the PCR
- Action Type/Reason – the action and associated reason performed for this PCR
- Agency – Personnel Area assigned to the position during the action
- Organizational Unit – the Org Unit ID and description
- Creator – The user who initiated/requested this PCR workflow item
- Employee – the Employee ID related to this PCR
- Position – the Position ID and description held by the Employee

The Detail section includes:

- Sequence – the line item sequence of where the PCR will be sent throughout the workflow process
- Role - represents the approver relationship
 - DA1 = Division Approver
 - AA1 = Agency Approver
 - FA1 = Funding Approver
 - OA1 = OSHR Approver
- Mandatory - whether this approver is mandatory (X = yes)
- Ptype - used to signify the Processor (P) and Approvers (A)
- Agent ID – Personnel number of the Approver
- Name/Description – name of the Employee
- Act/Desc – holds on value (P) Processed to indicate who processes the action
- Cmnt – indicates if a rejection note has been created for the action (click on “Notes Display” (eye glass icon with the text Notes) to view the rejection notes)
- Actual/Name – the Personnel number and name of the Initiator/Requestor

The person at the top of the list is the person who initiated/requested this PCR. The date and time requested is also included. When you have completed your review of the data in the workflow tracker, return to the main inbox.

Additional Resources

Training HELP website: https://www.osc.nc.gov/state-agency-resources/training/training_help_documents

Change Record

Change Date: 3/19/20 – Changed by C. Ennis

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