



COPYING NOTES FROM THE PCR TO INFOTYPES

PER-57 | BUSINESS PROCESS PROCEDURE

TRANSACTIONS ZPAA076 AND SBWP

PA

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 has the ability to 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.

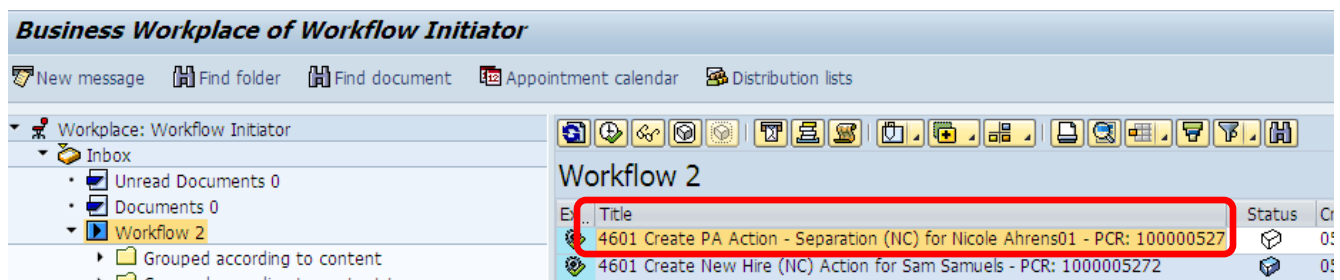
Access Transaction

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

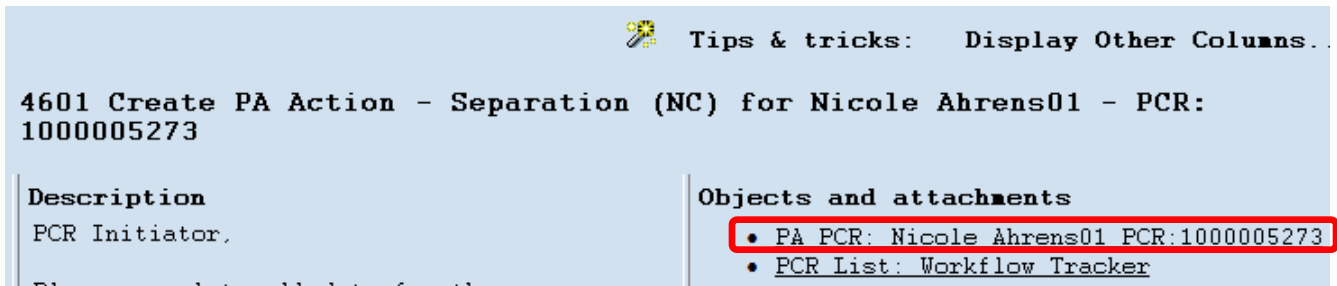
Via Transaction Code: N/A

Procedure

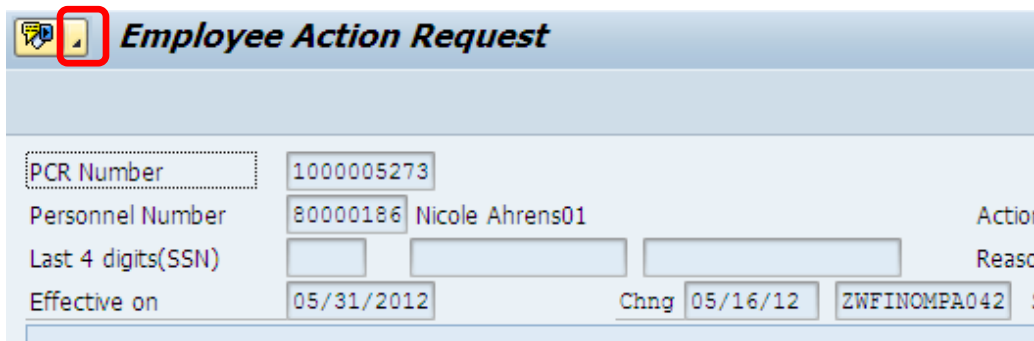
Begin the copy process on the Business Workplace of the Workflow Initiator (see below).



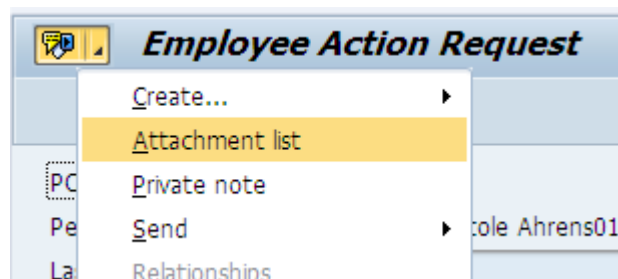
1. Single-click the **PCR** to select it.



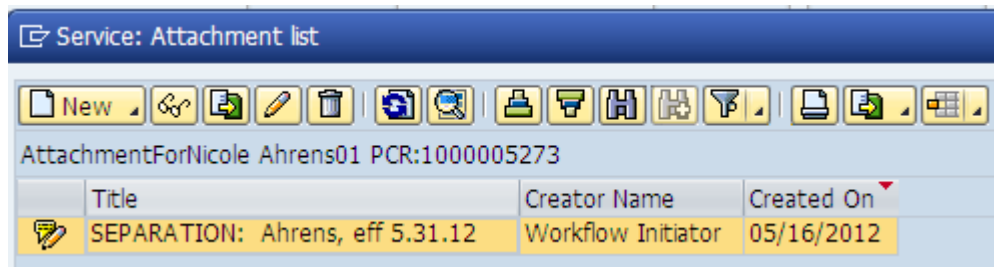
2. Single-click the **PA PCR number Header** at the bottom right of the Initiator's Workplace. The Employee Action Screen is displayed.



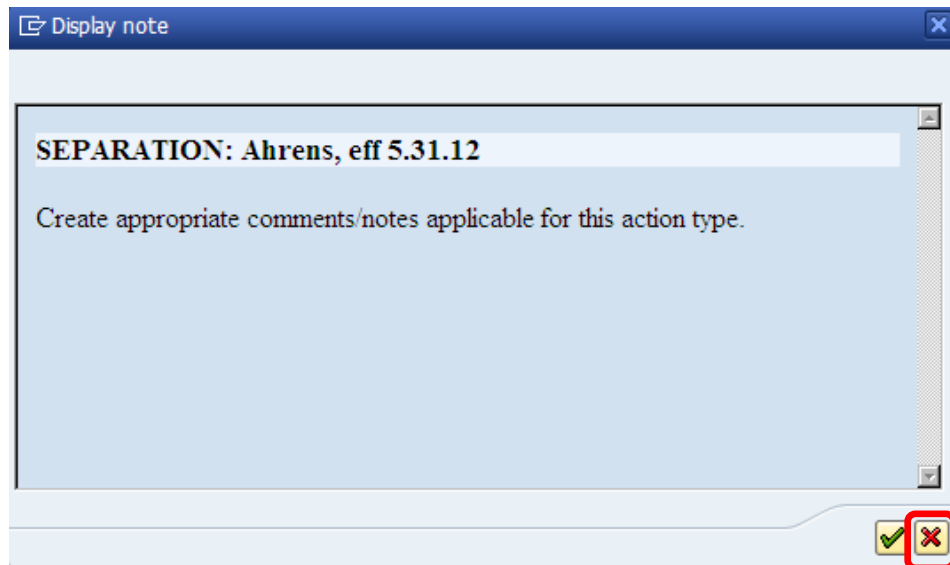
3. Click the right side of the **Services for Object button** to display a drop-down menu.






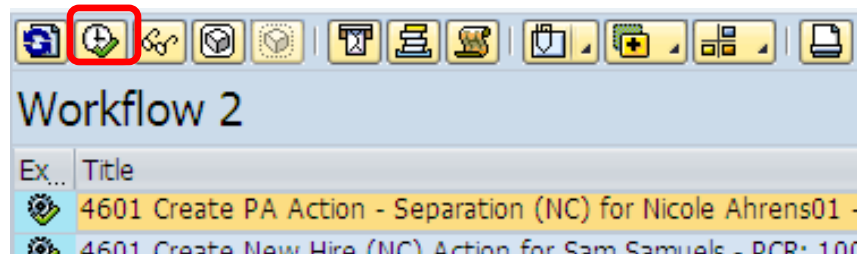
4. Click **Attachment list**.



5. Double-click on the desired **attachment**. (This example uses the Separation.) The attachment is displayed.



6. Right-click in the text area. A drop-down menu is displayed.
7. Click on **Select All**.
8. Right-click in the text area again.
9. This time click on **Copy**. Your text (including the title) has been copied to the computer’s “clipboard.”
10. Click the **Red X**  to close the attachment window.
11. Click the **Red X**  again to close the Services for Objects attachment window.
12. Click the **Green back arrow**  to return to the PCR.




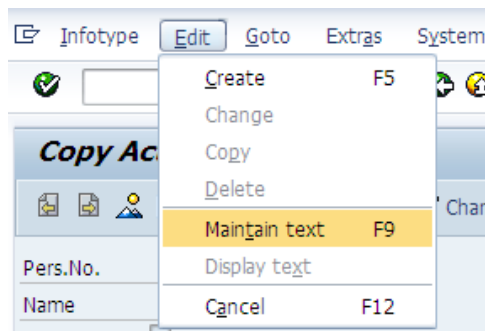
13. Double-click the **selected PCR** or click on the **Execute**  button

Personnel Actions

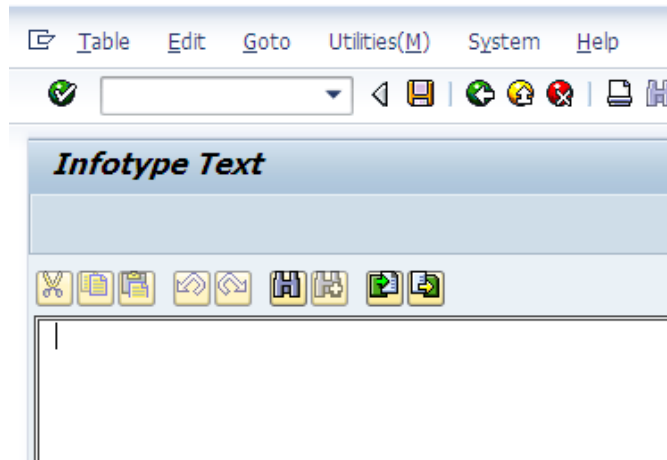
Personnel no. 80000186
 Name Nicole Ahrens01
 EEGroup A SPA Employees PersA 4601 Cultural Resources
 EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOURC...
 From 05/31/2012

Action Type	Personn...	EE group	EE subg...
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)			
Separation (NC)			
Career Progression (NC)			

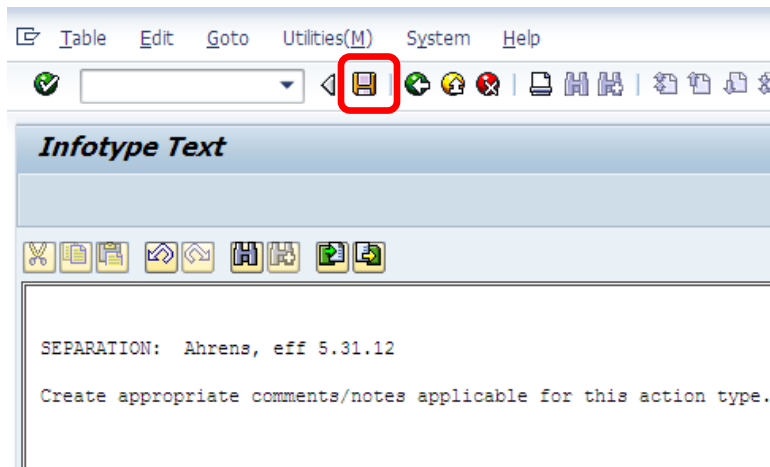
14. Enter the **effective date** of the action in the **From** field (should be same as PCR).
15. Click in front of the **action** you wish to process. (This example uses the Separation action.)
16. Click the **Execute**  button. The Actions infotype is displayed.




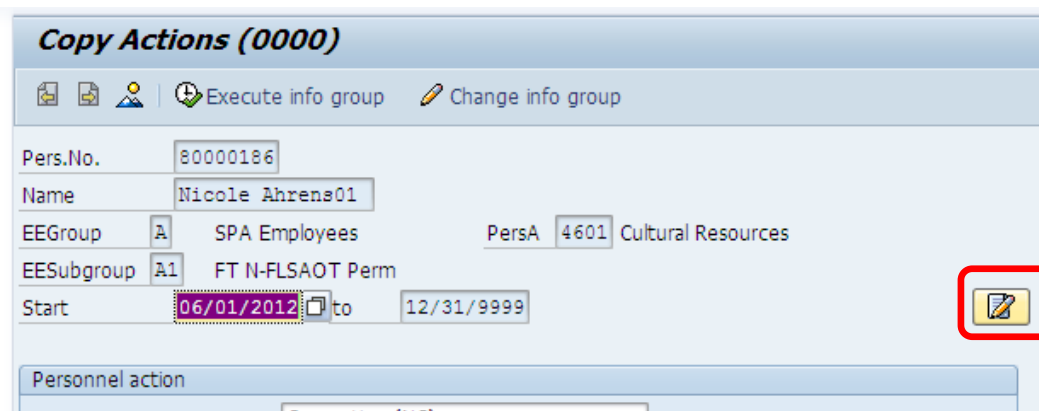
17. On the menu bar at the top of the screen, click **Edit > Maintain text**. A dialog box is displayed.



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



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



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

Additional Resources

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

Change Record

Change Date: 3/17/20 – Changed by C. Ennis

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