



DIVISION/AGENCY APPROVER INBOX

WF-3 | TRANSACTION SBWP

WF

The purpose of this Business Process Procedure is to demonstrate how Division and Agency approvers access their Workflow inbox, review their pending PCRs, and take action on them.

Trigger: A workflow item has been placed in your SAP Inbox for Division or Agency approval.

Business Process Procedure Overview:

As the Organizational Management (OM) Division or Agency Approver, you will log into your SAP Business Workplace (inbox) to review, adjust if appropriate and approve/reject the position change request related to the Personnel Change Request (PCR) in your SAP inbox.

The OM Division or Agency Approver is responsible for reviewing and approving/rejecting the request for a change of action on a position.

The PCRs which display in your SAP Business Workplace inbox were initiated by someone within your Agency using transaction code ZOMA069.

Tips and Tricks:

See the OM Tips and Tricks Job Aid for a full listing of Best Practices and Tips and Tricks. The job aid is located on the Training HELP website <https://www.osc.nc.gov/training> in the following folder: *Organizational Management > Job Aids*.

- **CAUTION - OM Actions:** For Division or Agency Approvers (and anyone else on the workflow approval process), until the OM action has been completely approved, processed, and marked as Complete by BEST Shared Services, the action will not be in an Active status in the system. Once the last person has approved this PCR, it is sent to BEST Shared Services for completion. BEST Shared Services opens the PCR in their inbox, marks it complete, and then the infotype(s) on the position are moved from a status of Planned to a status of Active. When reviewing data in the HR-Payroll System via transaction code PO13D, you will not see the changes submitted in this request on the Active Tab until the workflow approval process is 100% complete. You must look for the changes requested in the Planned Tab. If you do not see the changes you requested on the Active Tab, go to the Workflow Tracker and see which stage of the approval process the PCR is currently in. The person's name handling the PCR will be listed, so you can touch base with them on the status if you have questions.

Access Transaction:

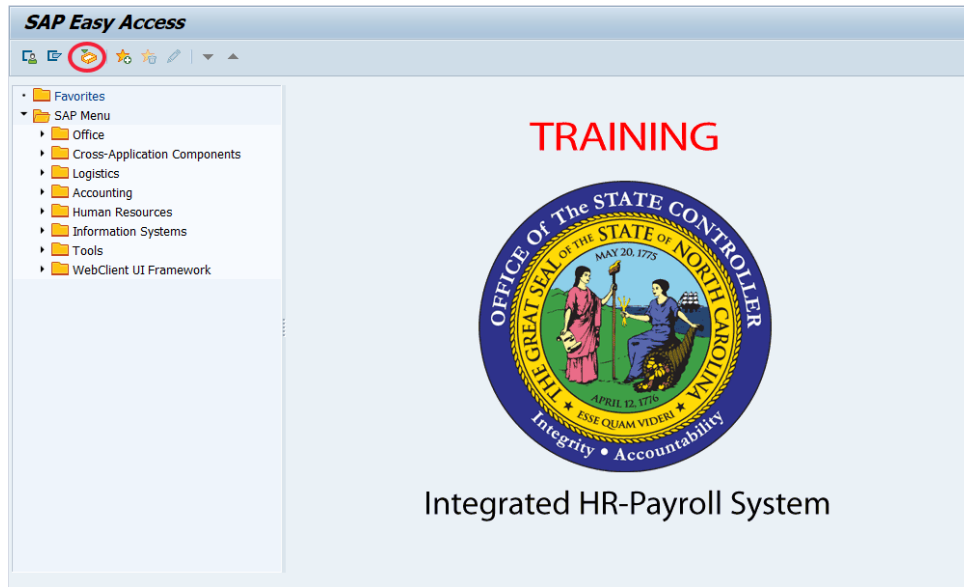
Via Menu Path: SAP menu > Office > SBWP - Workplace

Via Transaction Code: SBWP

Via SAP Easy Access Button: 


Procedure

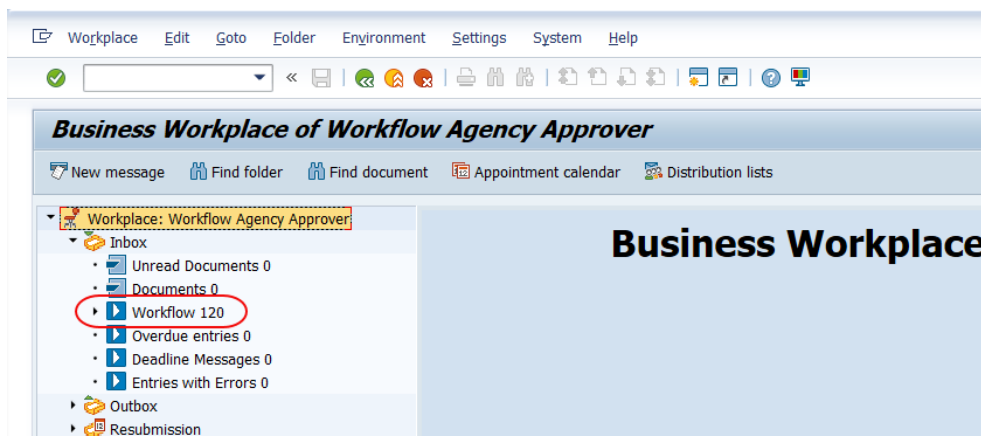
1. Click the **SAP Business Workplace (Ctrl+F12)**  button.



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

Inbox Functionality (SAP Business Workplace)

- The SAP Business Workplace is 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.
- The SAP Business Workplace inbox is where all workflow documents will be initiated and/or 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, Lotus Notes, etc).
- For more information on the SAP Business Workplace, including an overview of all Tree Functions (folders, organization of the workplace), see the Additional Resources section at the end of this document.



3. Click the appropriate row in the **PCR Title** column.

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 120**
- Overdue entries 0
- Deadline Messages 0
- Entries with Errors 0
- Outbox

Workflow 120

Exe...	Title	Status	Creation Date	Creation
	4601 PA Action - Salary Adjustment (NC) for Dianne Burger20 PCR: 1000005456	Work Item Title	01/13/2017	16:12:4
	4601 PA Action - Salary Adjustment (NC) for Dianne Burger19 PCR: 1000005455		01/13/2017	16:12:0
	4601 PA Action - Salary Adjustment (NC) for Dianne Burger18 PCR: 1000005454		01/13/2017	16:11:1
	4601 PA Action - Salary Adjustment (NC) for Dianne Burger17 PCR: 1000005453		01/13/2017	16:10:3
	4601 PA Action - Salary Adjustment (NC) for Dianne Burger16 PCR: 1000005452		01/13/2017	16:09:5

4. Click the **Execute (F8)**  button.

PCR List

- All columns can be sorted and adjusted based on your personal preference for viewing the data.
- Execute** column – you may 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's white, all designated approvers can view the PCR in their inbox; if it's gray/blue, you have reserved this PCR, and no one else can see it in their inbox (until released)
- Creation Date** – the date the PCR was created
- Creation Time** – the time of day the PCR was created
- 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.
 - 1 = Highest – Express
 - 2 = Very high
 - 3 = Higher
 - 4 = High
 - 5 = Medium
 - 6 = Low
 - 7 = Lower

- 8 = Very low
 - 9 = Lowest
5. Click the **PCR_List: OM Header** hyperlink. [OM Header: PCR -5000002090 - Position:65003159](#)
(in the example below)

Prior to approving or rejecting the workflow item, review the details within the request.

Decision Step in Workflow

Workflow Create Import

4601 - OM Action Create New Position for Position - 65003159 PCR: 5000002090

Choose one of the following alternatives

Approve change
Return to initiator
Cancel and keep work item in inbox

Description


Workflow status: In Process

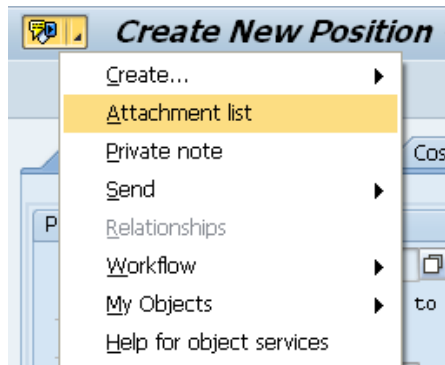
Please review the information in this screen and make your choice as follows:

Approve change - the request will continue onto the next approver or processor

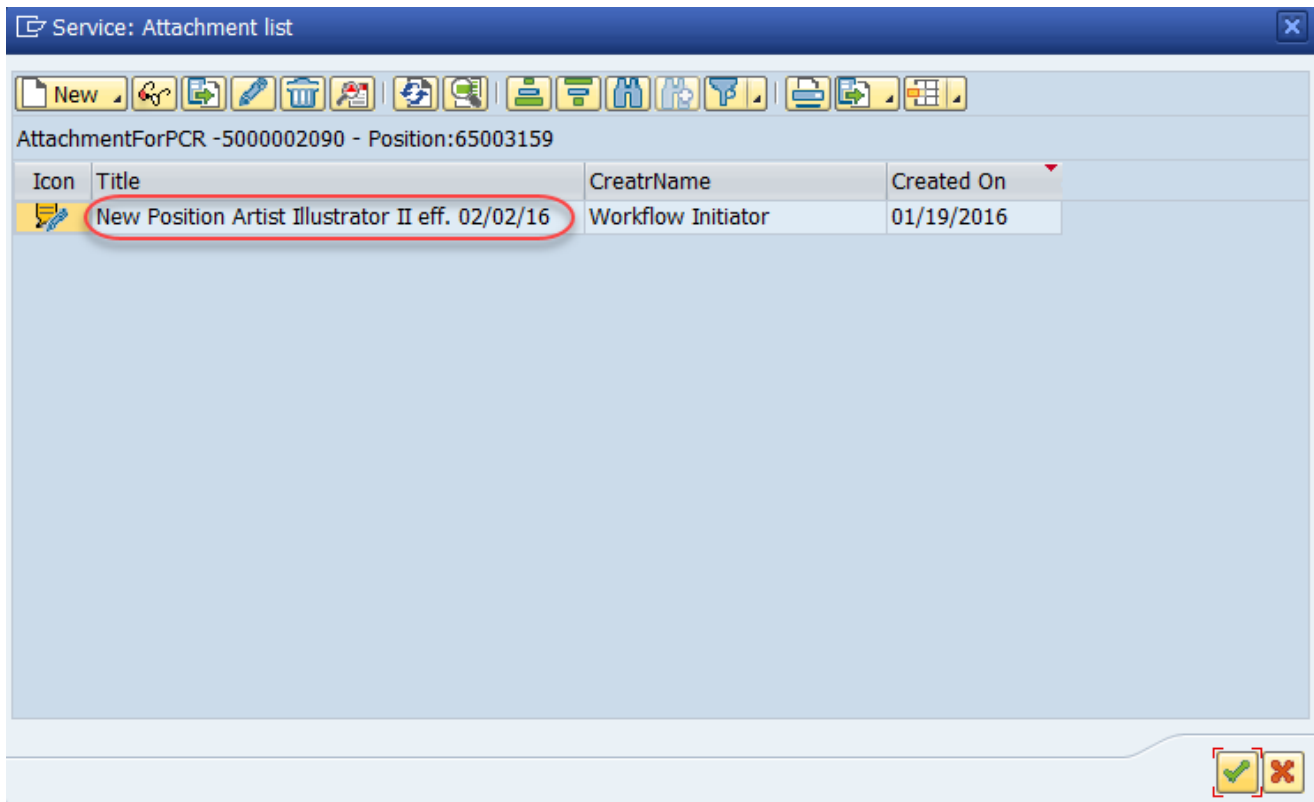
Objects and attachments

- [Object Attachment: New Position Artist Illustrator II eff. 02/02/16](#)
- [OM Header: PCR -5000002090 - Position:65003159](#)
- [OM Control: Workflow Tracker](#)

6. Click the **Services for Objects**  button.
7. Click the **Attachment List** option from the drop-down menu.



8. Click the **Title** [New Position Artist Illustrator II eff. 02/02/16](#) [Workflow Initiator](#) row.



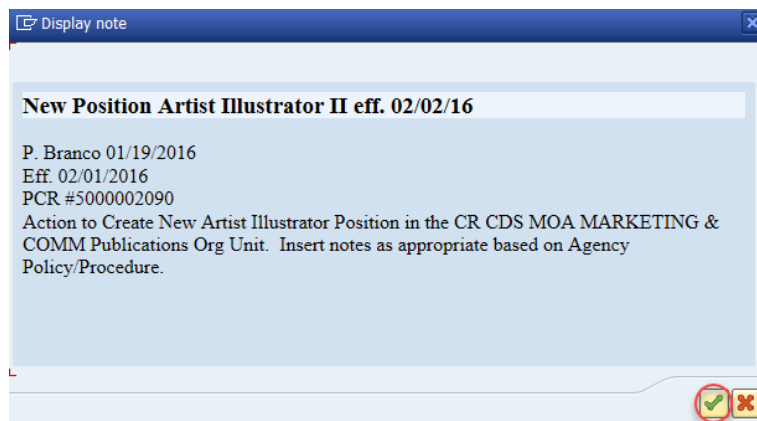
9. Click the **Display (F7)** button.

If multiple notes and/or attachments have been added to this PCR, they will be listed here. This is where you can display and copy the data as needed. You can also attach the notes/attachments to the corresponding Action once approved.

NOTE: If you receive a window requesting that you choose between PCR attachments, choose the attachment corresponding to the PCR number with which you're working. This extra window does not normally display.

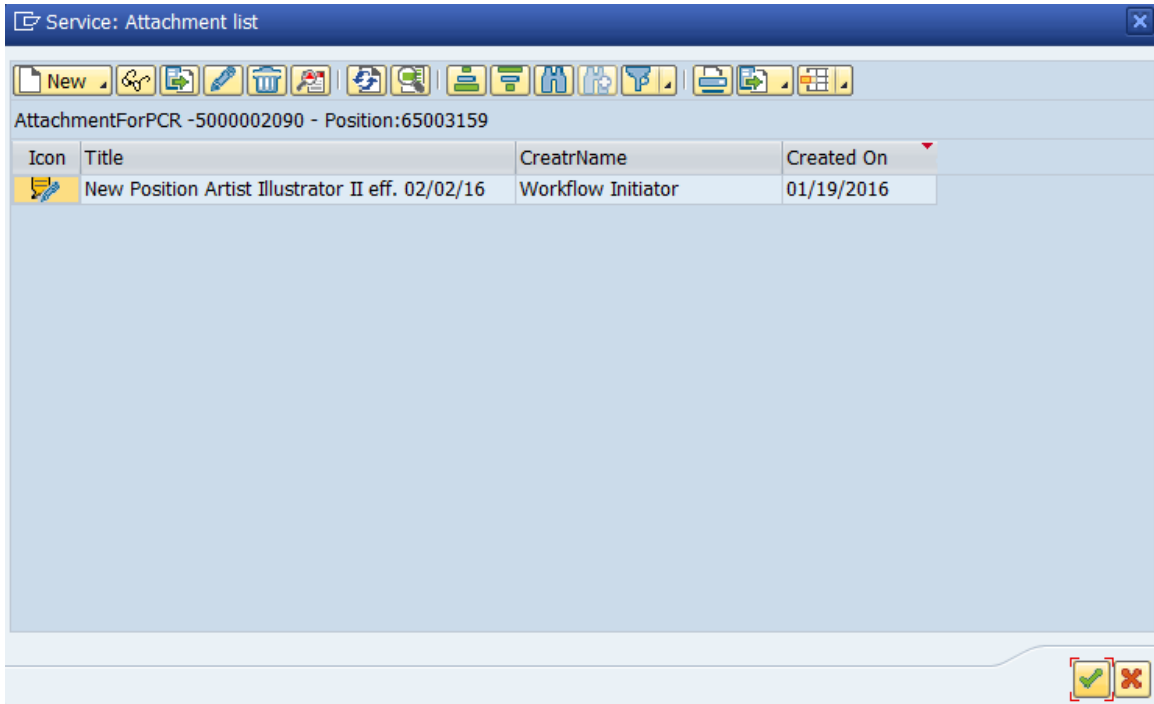
10. Click the **Copy (Enter)** button.

Review the information as appropriate, and close then window (or document if you opened an attachment) when complete.



11. Click the **Continue (Enter)** button.

Also, you can add your own notes and/or attachments on this screen. Choose the type of note from the **New** button drop-down (not demonstrated here).



12. Click the **Approve Change** **Approve change** button.

Approval Screen options

- **Approve Change** – The PCR is moved to the “approved” status for that step within the approval route. The PCR is moved to the next step in the approval process.
- **Return to the Initiator** – The PCR is moved to the “reject” status and returned to the initiator for cancellation or modifications and resubmission.
- **Cancel and keep work item in Inbox** – The PCR display is closed and the item remains in your inbox. Note that the item is “Reserved” as yours, and no other approver within your group can see it in their inbox unless you “Release” the PCR for general viewing.

NOTE: The PCR will remain in your inbox until you either 1) approver/reject it, or 2) another approver approves/rejects it.

NOTE: After approving or rejecting a PCR, you can go to your Outbox “Workflow items executed by me” to view the PCR work item as a confirmation that the PCR was indeed processed and sent to the next stage (if approved, forward or if rejected, back to the initiator).

Decision Step in Workflow

Workflow Create Import

4601 - OM Action Create New Position for Position - 65003159 PCR: 5000002090

Choose one of the following alternatives

Approve change
Return to initiator
Cancel and keep work item in inbox

13. Select **Outbox >> Work items executed by me.**

Notice that the PCR workflow item is no longer in your Inbox. To verify the PCR has gone to the next step in the workflow process and to locate the place you can find this PCR in the future and research the exact stage of the approval process, go to your Outbox ==> Workflow items executed by me.

Business Workplace of Workflow Agency Approver

New message Find folder Find document Appointment calendar

Workplace: Workflow Agency Approver

- Inbox
 - Unread Documents 0
 - Documents 0
 - Workflow 124**
 - Overdue entries 0
 - Deadline Messages 0
 - Entries with Errors 0
- Outbox
 - Documents
 - Started workflows
 - Work items executed by me**
 - Forwarded work items

Workflow 124

Exe...	Title
	4601 - OM Action Create New
	4601 - OM Action Create New
	4601 - OM Action Create New
	4601 - OM Action Create New
	4601 PA Action - Salary Adjus
	4601 PA Action - Salary Adjus
	4601 PA Action - Salary Adjus
	4601 PA Action - Salary Adjus
	4601 PA Action - Salary Adjus
	4601 PA Action - Salary Adjus

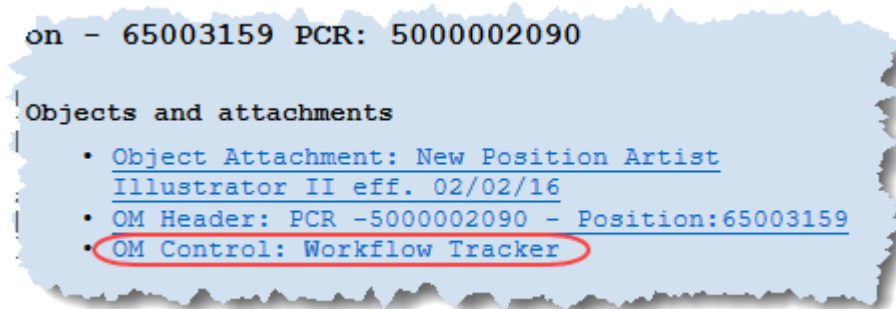
14. Select the **PCR Title** 4601 - OM Action Create New Position for Position - 65003159 row.

Work items executed by me (Since 02/27/2021)

Wor...	Title	Status	Executed on	Execu
	4601 - OM Action Create New Position for Position - 65003159 PCR: 50000020...		03/29/2021	08:15

15. Select the **OM Control Workflow Tracker** [OM Control: Workflow Tracker](#) hyperlink.

To view the current history of this PCR (which will display the most updated history when you review it), click on the PCR to highlight it in yellow, and scroll to the bottom of the screen in the lower right window. Locate the item within the *Objects and attachments* area. Look for the words, "OM Control: Workflow Tracker. Click this link to display the Workflow Tracker Details.



16. Review the information within the Workflow Tracker.

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 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
 - FA1 = Funding Approver
 - DA1 = Division Approver
 - AA1 = Agency Approver
 - SPA = Shared Services
 - 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

Workflow actions

Heading

Request ID: 5000002090 Status: A Approved Approval Level: SOM OM Shared Services Processing

Action: 100 Create New Position

Agency: 4601 Natural and Cultural Resources Position: 65003159


Creator: 80000021 Terrence Patel Org Unit: 20010272 CR CDS MOA MARKETING & COMM Publications

Seq	Role	Mand	Ptype	Atype	Agent ID	Name / Description	Act	Desc	Cmnt	Actual	Name	ACT DATE	ACT TIME
1			P	P	80000021	Terrence Patel	P	Processed		80000021	Terrence Patel	01/19/2016	08:38:17
100	FAL	X	A	P	80000024	James Matthews	O	N/A				03/26/2021	13:45:06
100	FAL	X	A	P	80001063	Earl Gutierrez01	O	N/A				03/26/2021	13:45:06
100	FAL	X	A	P	80001064	Earl Gutierrez02	A	Approved		80001064	Earl Gutierrez02	03/26/2021	13:45:06
100	FAL	X	A	P	80001065	Earl Gutierrez03	O	N/A				03/26/2021	13:45:06
100	FAL	X	A	P	80001066	Earl Gutierrez04	O	N/A				03/26/2021	13:45:06
200	AA1	X	A	P	80001043	Carolyn Bracy01	A	Approved		80001043	Carolyn Bracy01	03/29/2021	08:15:01
200	AA1	X	A	P	80001044	Carolyn Bracy02	O	N/A				03/29/2021	08:15:01
200	AA1	X	A	P	80001045	Carolyn Bracy03	O	N/A				03/29/2021	08:15:01
200	AA1	X	A	P	80001046	Carolyn Bracy04	O	N/A				03/29/2021	08:15:01



17. Click the **Back (F3)**  button.

This information will provide you the most up-to-date view of this PCR now and anytime in the future.

NOTE: There are currently no plans to delete (clean-up) items from your Outbox.



Work items executed by me (Since 02/27/2021)

Wor..	Title	Status	Executed on	Exec
	4601 - OM Action Create New Position for Position - 65003159 PCR: 50000020...		03/29/2021	08:15

18. Click the **Back (F3)**  button.

You may remain in this SAP Business Workplace and process additional PCRs or click **Back** to return to the SAP Easy Access screen.

The system task is complete.

Additional Resources

Training HELP website: <https://www.osc.nc.gov/training>

Student Guides	<i>Student Guides > WF220: BEACON SAP Workflow</i>
Job Aids	<i>OM > Job Aids > Business Workplace Button Functions</i> <i>OM > Job Aids > OM Business Workplace Dynamic Columns & Layouts</i> <i>OM > Job Aids > OM Business Workplace Overview Tree Functions</i> <i>OM > Job Aids > OM Workflow Inbox</i> <i>OM > Job Aids > OM Workflow Routing Process</i> <i>OM > Job Aids > OM Workflow Steps in Approval Process</i>

Change Record

Change Date: 4/30/21 – Changed by D. Genzlinger

Changes: Converted from OM-26 to WF-3. Added active links to Additional Resources section.
Redesigned so that screen shots follow instructions.