



PA WORKFLOW REPORT

JOB AID WF-11 | ZPA0189

WF

The purpose of this job aid is to explain how to generate the PA Workflow Report and how to set up an ALV Variant.

Access the *PA Workflow Reports* screen by entering the following Transaction code in the Command field:

- Enter **zpa0189**

The requested Workflow Report is displayed. See the examples below of the *PA Workflow Report* screens.

PA Workflow Report

The screenshot shows the SAP selection screen for the PA Workflow Report. It includes the following fields and options:

- Selection:** Personnel number (with a search icon).
- Additional data:** Created Date, Effective Date, Action Type, Personnel area, PCR ID, and PCR WF Approval Level. Each field has a corresponding 'to' field and a search icon.
- Output options:** ALV Layout variant.

Workflow Report Search Criteria

The Workflow Reports can be generated only for those entities for which you have security. You can generate the report for your entire agency *if* you have that security access. The Workflow Report can also be run for smaller groups or for an individual PCR.

Data Search Options

For **PA** you can search by:

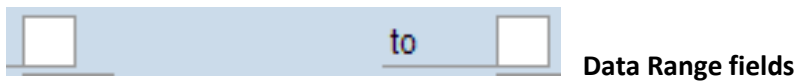
- Personnel number – employee personnel number
NOTE: You must enter all eight digits, including any leading zeros.
- Create Date – the date the PCR was created.
- Effective Date – the date of the Action.

- Action type
 - Use the drop-down menu to select the actions type.
- Personnel area
 - For those for which you have security access
- PCR ID (if known)
- PCR WF Approval Level
 - Use the drop-down menu to select the workflow approval levels. (see last page for code definitions)



Multiple Selection icon

In the Selection and the Additional Data sections the search can be performed using multiple selection criteria to broaden the output.



Data Range fields


In the Additional Data section, the search can be performed using individual data or even a range of data.



Variant List field

ALV Layout Variants can be created. This job aid will explain how to set up the ALV Layout Variant later in the document.

Executing the Workflow Report

1. Determine the search criteria data needed for your report.
2. Enter the data in the various fields.
3. Click  (Execute) to perform the search.




Information on the Workflow Report

1. Click  for Job Aid.

Managing the Layout View



Layout Management Options:

-  Change layout icon
-  Select layout icon
-  Save layout icon

Executing, Changing, and Saving the Layout of a Report

The following actions are demonstrated in this section:

- How to search for PA Actions Z1 to Z6
- How to search in Personnel area 4601
- How to execute the report
- How to change the layout
- How to save the layout as a variant

1. Type **ZPA0189** in the Command field and press Enter to access the PA Workflow Report.

The image shows the main search screen of the PA Workflow Report. The title 'PA Workflow Report' is at the top. Below the title is a search bar with a green checkmark icon and a blue 'f' icon. The search bar is labeled 'Selection' and contains the text 'Personnel number'. Below the search bar is a section labeled 'Additional data' which contains several search criteria: 'Created Date', 'Effective Date', 'Action Type', 'Personnel area', 'PCR ID', and 'PCR WF Approval Level'. Each criterion has a text input field and a 'to' field. To the right of these fields are five yellow arrow icons pointing right. At the bottom of the screen is a section labeled 'Output options' with a text input field for 'ALV Layout variant'.

2. Enter the search criteria in the fields needed in the **Selection** and **Additional data** sections of this screen.

NOTE: You will see only what your system security will allow you to see.

3. Click the **Execute** button.

4. Click the **Change layout** icon . A pop-up box is displayed.

There are five tab options on the Change Layout box.

- **Displayed Column tab**– Displays the fields included on the current report. If you want a different layout, adjust the display by moving the columns to the right column to “hide” them from the display.



Highlight an item in the **Displayed Columns** list and move it to the **Column set** list



Highlight a **Column set** item and move it to the **Displayed Columns** list



Move the highlighted item up in the order (moves the column to the left on the report)



Move the highlighted item down in the order (moves the column to the right on the report)




Move the highlighted item to the top of the list (to the left of the report)



Move the highlighted item to the bottom of the list (to the right of the report)



Helps to search for a field


- **Sort Order tab** – Displays the currently sorted fields on the left and the set of available fields on the right. (also available under the **Sort** buttons ).

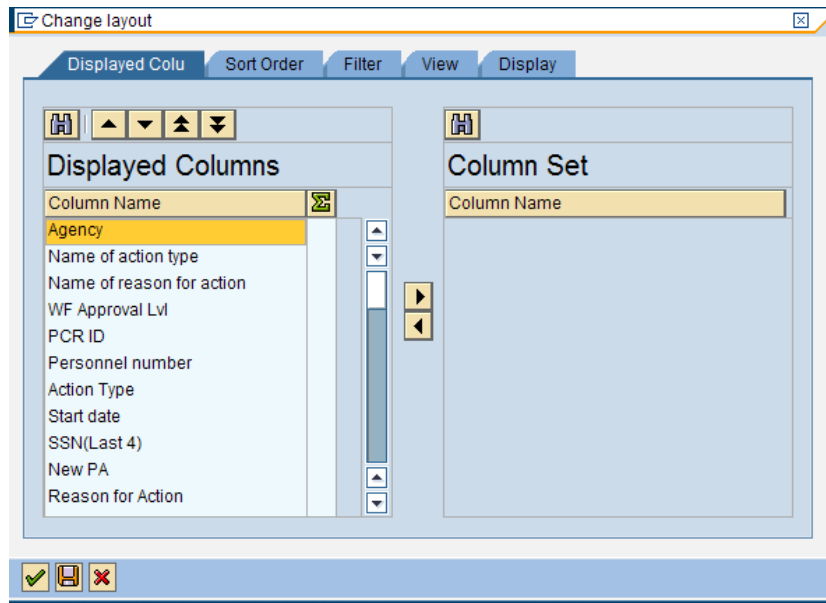



Ascending order filter

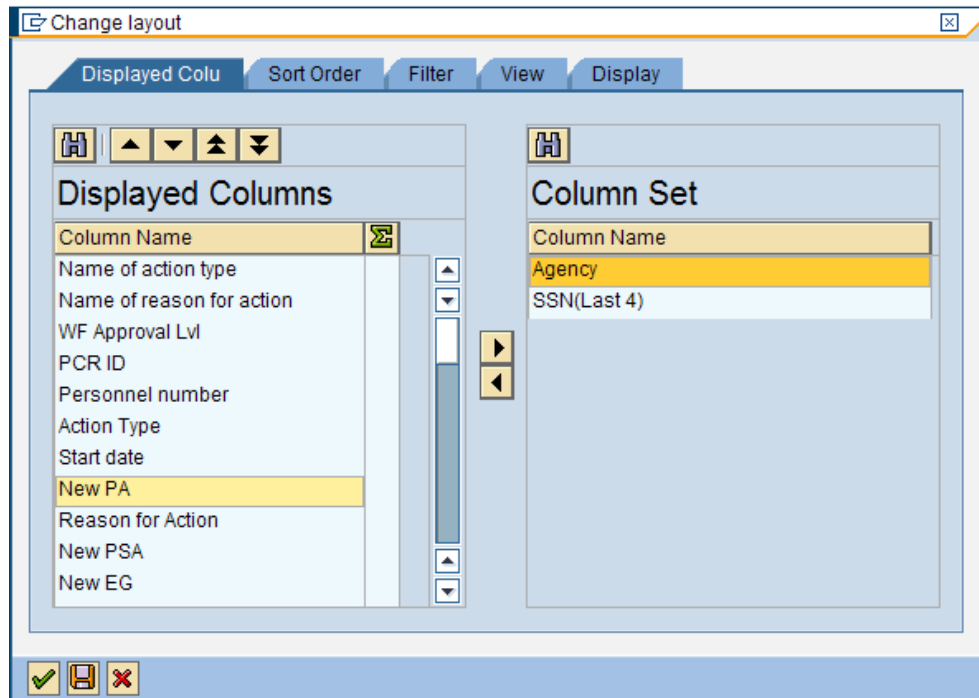


Descending order filter

- **Filter tab** - The fields currently filtered on are shown on the left, the set of available fields are shown on the right (also available under the filter button .
- **View tab** - allows the user to choose various data views
- **Display tab** - allows various data views



5. Select any columns not needed on this report by highlighting the column name in the Displayed Columns list and either double-clicking or clicking the Hide selected columns button  located in between the column sets.




6. Once the unneeded columns are selected, click on the green check mark at the bottom left of the pop-up box. The report redisplay with the column set selected.

7. The order of the columns can be rearranged in the display. Position your mouse over the top of the column to be moved until the cursor changes to a dark down arrow. Single-click to highlight that column. In the following example the Act. Column is highlighted.
8. Position the cursor over the title of the column and drag it to where it should display. A red line will indicate when it is where the column needs to be moved. Release the mouse and the column will move to that position.

| Action Type | Name of reason for action | Act. | WF Approval Lvl | PCR ID | Pers. No. | Start date |
|----------------|---------------------------|------|-----------------|------------|-----------|------------|
| Promotion (NC) | Promotion | Z1 | Agency Approval | 1000005170 | 80000754 | 06/30/2008 |
| Promotion (NC) | Promotion | Z1 | Agency Approval | 1000005169 | 80000753 | 06/30/2008 |

In the preceding example, note that the **Act. Code column** was moved to follow the **Name of reason for action** column.

9. Click the **Save layout** icon  to save this layout to display each time this report is generated. The Save layout pop-up box is displayed.

10. Enter a short description in the **Save layout:** field to identify the layout design.

NOTE: To make this layout user-specific, begin the layout name with a **Z**.

11. Enter a more descriptive name for the layout in the **Name:** field.

12. Check the **User-specific** checkbox to restrict this layout design your user ID.

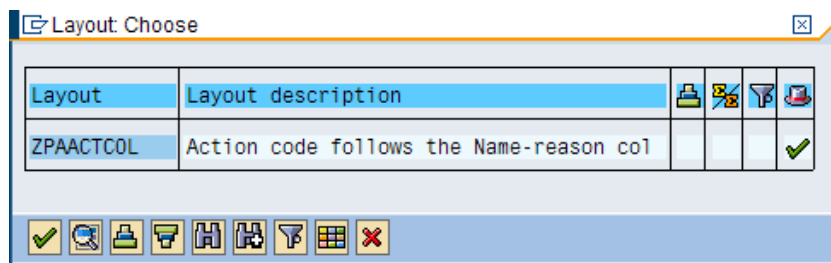
NOTE: If the User-specific box is not checked, the layout will be available to all who have security to generate this report. It can be changed by anyone with security access to this report.


13. When all the fields are entered on the Save layout box, click the green check mark in the lower left hand corner of the box to save the layout design.

An ALV Variant layout has just been created.

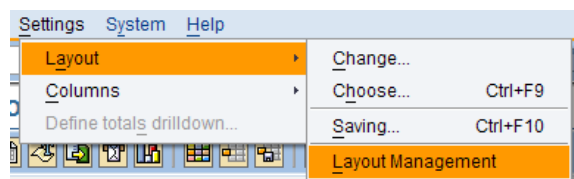
Retrieving an ALV Variant Layout of a Report

1. To retrieve an ALV Variant for a report, complete the search criteria fields in the **Selection** and **Additional data** sections of the report screen.
2. Click on the matchcode in the **ALV Variant** field. The **Layout: Choose** pop-up selection box is displayed showing any preset variants.



3. Click on the layout needed, and click Execute to generate the report. The report will display with the applied variant layout.
 - If the variant isn't selected prior to executing the report, it can be applied once you are in the report by clicking on the **Select layout** icon . The **Choose layout** selection box is displayed with the available options. Click on the layout needed. The layout is then applied.
 - To change the current view to another view, use the **Select layout** icon to apply that view in the current report.
 - The default layout view can be set by accessing the following menu path:

Settings > Layout > Layout Management



- A default setting can be set so that it is used each time the report is generated. Do this by clicking in the **Default setting** field next to layout you choose.

Layout: Management

| Layout | Default setting | Layout description |
|-----------|-----------------|---|
| ZPAACTCOL | ✓ | Action code follows the Name-reason col |
| ZPASIMPLE | | Limited view |

New WF Approval Level Codes

| Level Code | Level Description | Conditions |
|-------------|-----------------------------------|---|
| ICRE | Awaiting Initiator PCR Initiation | Coded in both screen Tranx programs when PCR is first created (D) |
| IREJ | Awaiting Initiator Resubmission | After rejected waiting for Initiator to “Resubmit” or “Cancel PCR” |
| IPRO | Initiator Processing | PA – Waiting for Initiator to complete ZHR_HIRING and/or PA40 |
| DA1 | Division Approval | Waiting for Division Approval |
| AA1 | Agency Approval | Waiting for Agency Approval |
| FA1 | Funding Approval | Waiting for Funding Approval |
| OA1 | OSHR Approval | Waiting for OSP Approval |
| BA1 | OSBM Approval | OM – Waiting for Budget Approval |
| SOM | OM Shared Services Approval | OM – Waiting for Shared Service Approval and/or processing |
| SPA | PA Shared Services Approval | PA – Waiting for Shared Services Approval and/or processing |
| CREJ | Complete – Rejected | Initiator “Cancels PCR” after a Rejection |
| CAPR | Complete – Approved | PA – After all approved (<i>Main</i>) OM – After all approved (<i>Main</i>) and after Shared Services Approval |
| CCAN | Complete – Cancelled | PA – After Initiator chooses “Reject after Execution” . (<i>In Cancel Sub-WF, End of Main</i>) |