FN-02 Funding Approver PA PCR Process

Purpose

The purpose of this Business Process Procedure is to demonstrate how Funding Approvers use transaction PO13 to change the budgeted amount for positions during the PCR review process in the Integrated HR-Payroll System.

Trigger

When reviewing PA PCRs, adjustments to a position's budgeted salary is often required.

Business Process Procedure Overview

Funding Approvers are required to approve many Personnel Administration actions which necessitate a change to the budgeted amount to the position that the employee holds. The approver will review the PCR's header info to determine if a change to the position is likely. A new screen is opened to review the current budgeted amount for the position. If it is determined that a change is required, the Funding Approver will use transaction PO13 to make the necessary adjustment before returning to PCR and approving.

Access Transactions

Via Menu Path: SAP menu >> Human Resources >> Organizational Management >> Expert Mode >> PO13 – Position

Via Transaction Code: PO13, ZPOS, SBWP

Note: All data in this document is from the OSC training environment and does not reflect any real-world information.

Procedure

There are 20 steps to complete this process.

Step 1. Click on the **SAP Business Workplace** button to open your inbox.

Step 2. Review the Workflow Header for each PCR as part of the approval process. Carefully review the Annual Salary fields.

Image

Employee Action Request

Menu

PCR Number	1000005559				
Personnel Number	10000151	Michelle Anna Salazar 01	Action:	ZC	Salary Adjustment (NC)
Last 4 digits(SSN)			Reason:	23	Performance Increase
Effective on	04/20/2024	Chng 04/20/24 INOTPATEL800	St:	A	Approved

CURRE...			PROPOS...		
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	SHRA Employees	EE Group	A	SHRA Employees
EE Subgroup	A1	FT N-FLSAOT Perm	EE Subgrp	A1	FT N-FLSAOT Perm
Org. Unit	20010134	CR CDS Archives & History	Org. Unit	20010134	CR CDS Archives & History
Job	32001187	Administrative Officer I	Job	32001187	Administrative Officer I
EE Position	65002487	Contracts Administrator	EE Position	65002487	Contracts Administrator

Basic Pay

Pay Scale type	18 North Carolina		Pay Scale type	18 North Carolina	
Pay Scale Area	01 Annual Salaries		Pay Scale Area	01 Annual Salaries	
Pay Scale Group	NC11	Level 02	Pay Scale Group	NC11	Level 02
Annual Salary	56,170.00	Hrly Sal 0.00	Annual Salary	58,389.00	Hourly Salary 0.00
	Calc Step - -MP		Calc Step - MP	3.95	
			Min	50,428.00	
			Max	58,389.00	Next Inc Date

If an employee's salary is changing as part of the PCR process, then the budgeted amount of the position most likely needs to change as well. Make note of the effective date on the PCR and check the budgeted amount for the position in the proposed column. This is the date that will be used when adjusting the position's budget.

Some PA PCRs have a cost tab. Viewing this area will allow you to see relevant budget information; however, it cannot be changed via Workflow's PA action approval process.

Step 3.   Input transaction **ZPOS** into the command field. Click the **Enter** button.

Image

Step 4.   Input the position number and effective date and choose **Execute**.

Step 5.   Review the Fund Data.

If the position is occupied, it should match the incumbent employee's salary before the PA action is completed. If it is vacant, then it should match the minimum of its classification.

If the Budgeted Salary equals the amount in the PCR, then no adjustment needs to be made and you can close this window and approve the PCR without further action. Otherwise, proceed with the following steps

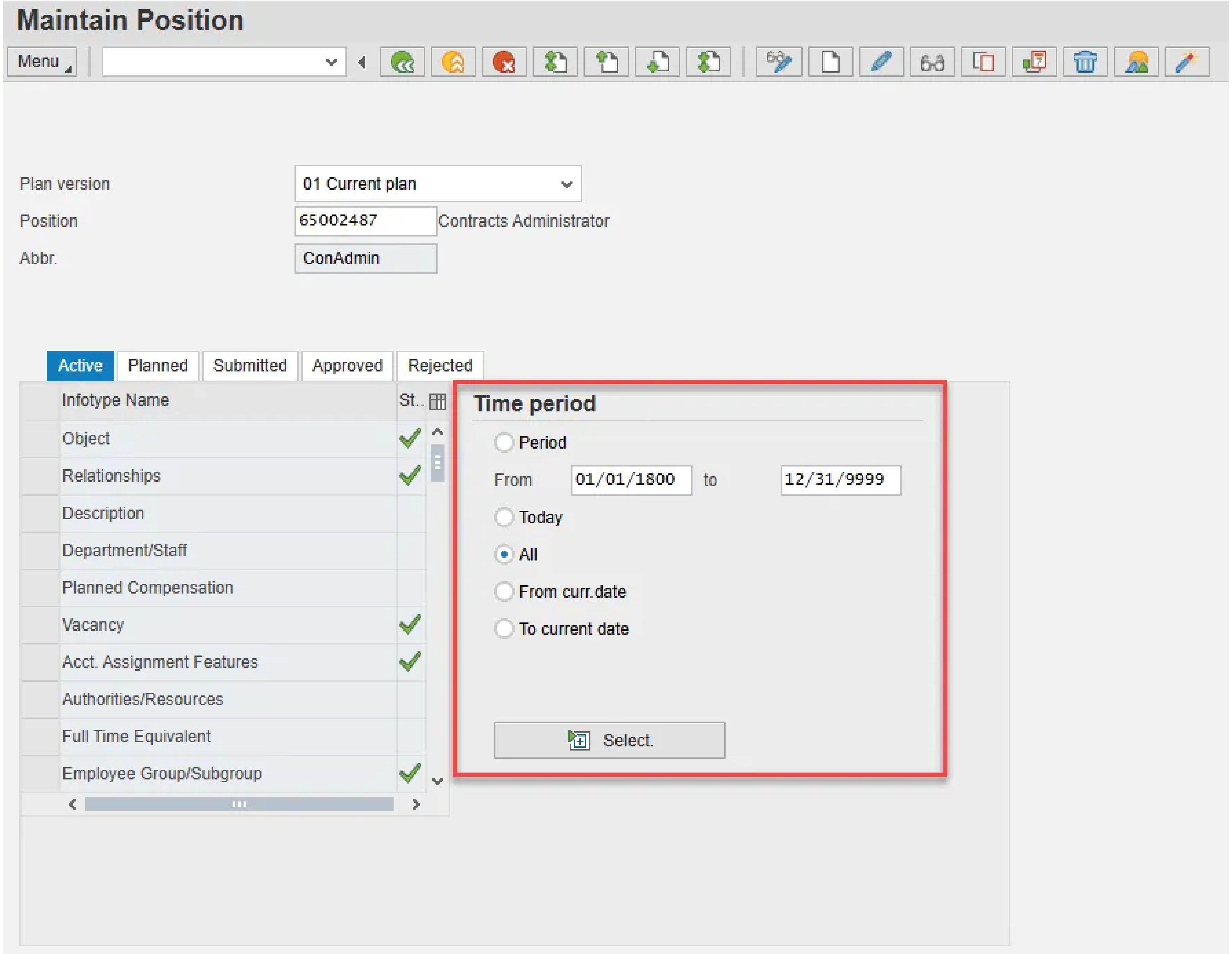
Step 6.   Click the **back** button twice to bring you back to the SAP Easy Access screen

Step 7. Input **PO13** into the command bar and click the **Enter** button.

Image

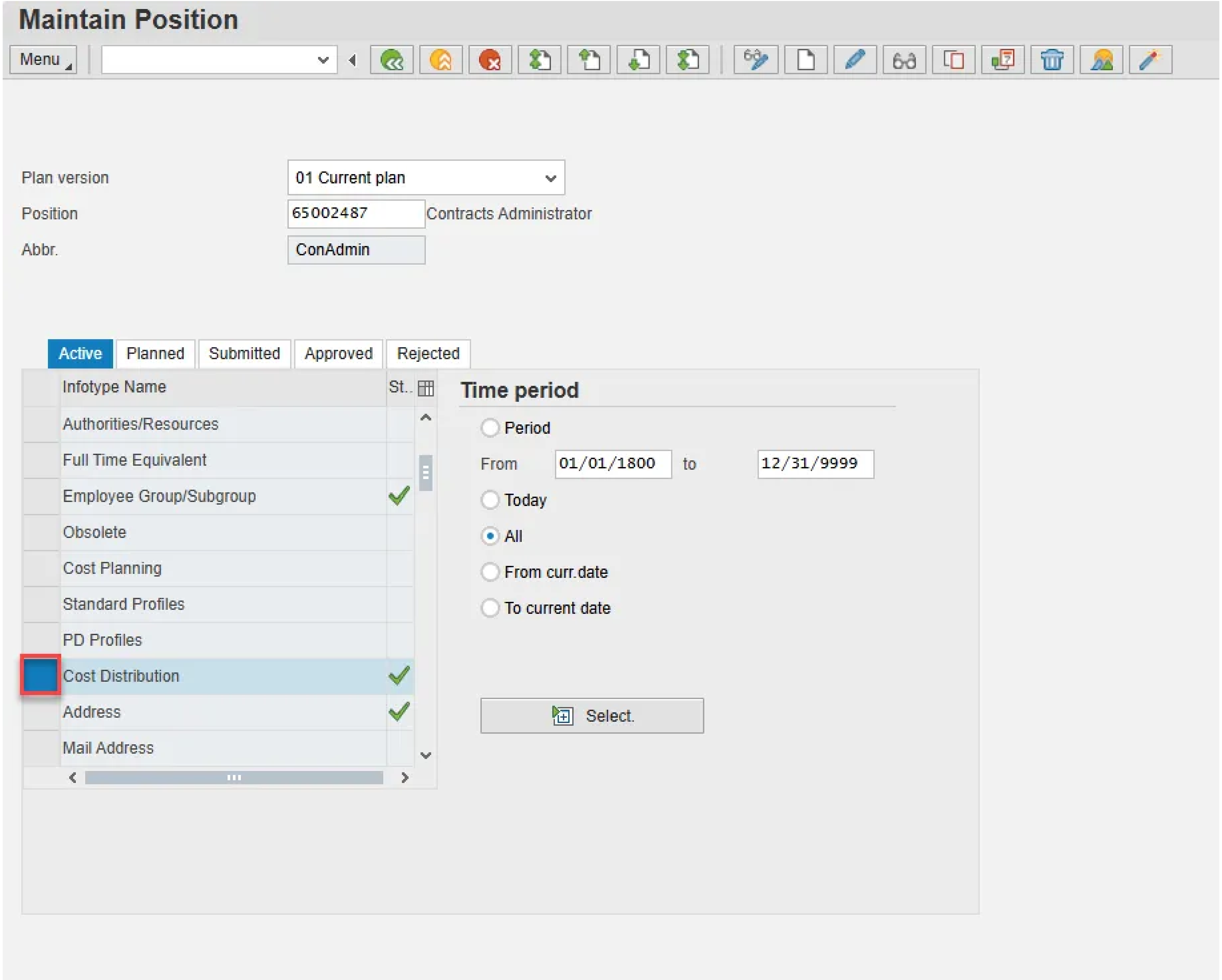
Step 8. Input the position number and choose **Enter**. Also, ensure that your time period encompasses the effective date of the PCR. Using the ‘All’ option is an easy way to do this.

Image


Maintain Position
Menu
Plan version
01 Current plan
Position
65002487
Contracts Administrator
Abbr.
ConAdmin
Active
Planned
Submitted
Approved
Rejected
Infotype Name
St..
Object
Relationships
Description
Department/Staff
Planned Compensation
Vacancy
Acct. Assignment Features
Authorities/Resources
Full Time Equivalent
Employee Group/Subgroup
Time period
Period
From
01/01/1800
to
12/31/9999
Today
All
From curr.date
To current date
Select.

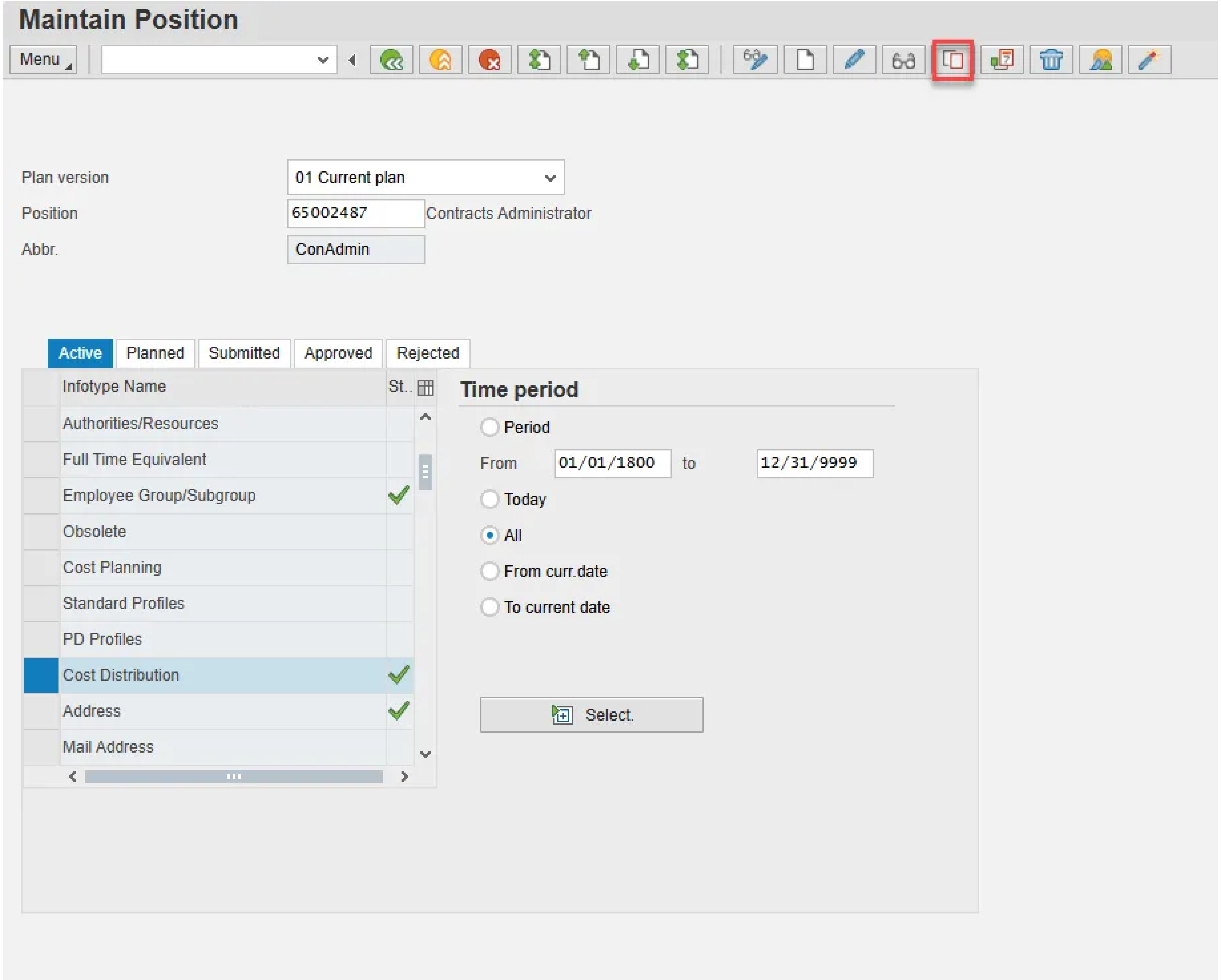
Step 9. Locate and select the Cost Distribution infotype in the list of infotypes. You will have to scroll down just a little way and it will have a check mark next to it.

Image


Maintain Position
Menu
Plan version
01 Current plan
Position
65002487
Contracts Administrator
Abbr.
ConAdmin
Active
Planned
Submitted
Approved
Rejected
Infotype Name
St..
Authorities/Resources
Full Time Equivalent
Employee Group/Subgroup
Obsolete
Cost Planning
Standard Profiles
PD Profiles
Cost Distribution
Address
Mail Address
Time period
Period
From
01/01/1800
to
12/31/9999
Today
All
From curr.date
To current date
Select.

Step 10. Click the **Copy** button.

Image

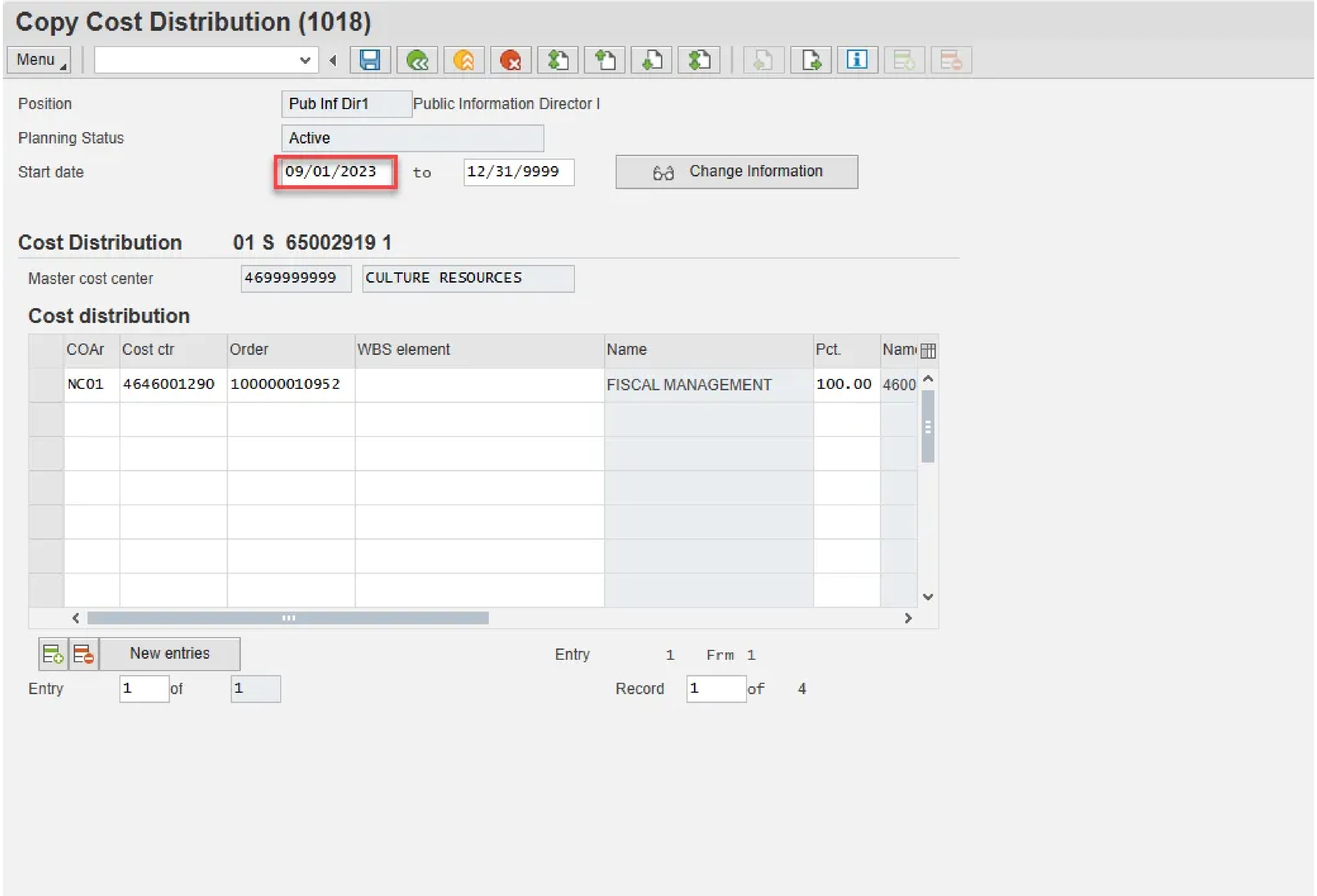

Maintain Position
Menu
Plan version
01 Current plan
Position
65002487
Contracts Administrator
Abbr.
ConAdmin
Active
Planned
Submitted
Approved
Rejected
Infotype Name
St..
Authorities/Resources
Full Time Equivalent
Employee Group/Subgroup
Obsolete
Cost Planning
Standard Profiles
PD Profiles
Cost Distribution
Address
Mail Address
Time period
Period
From
01/01/1800
to
12/31/9999
Today
All
From curr.date
To current date
Select.

****Very Important****

It is **VERY** important that you use copy when updating a position's budgeted amount. Doing so will ensure that prior budgetary information is retained.

Step 11.   Input the effective date of the PCR in the Start date field and click the **Enter** button.

Image


Copy Cost Distribution (1018)
Menu
Position
Pub Inf Dir1
Public Information Director I
Planning Status
Active
Start date
09/01/2023
to
12/31/9999
Change Information
Cost Distribution
01 S 65002919 1
Master cost center
4699999999
CULTURE RESOURCES
Cost distribution
COAr
Cost ctr
Order
WBS element
Name
Pct.
Nam
NC01
4646001290
100000010952
FISCAL MANAGEMENT
100.00
4600
New entries
Entry
1
Frm 1
Entry
1
of
1
Record
1
of
4

Step 12. On the Budget Distribution screen that comes up, input the proposed salary amount from the PCR. In the Action/Reason field, choose 111 – Position Budgeted Salary Change.

Image

Type of Action (1)

Restrictions

Act.	Action text
10	Create Organizational Unit
100	Create New Position
102	Re-Establish Position
103	Reallocate Position Up
104	Reallocate Position Down
105	Reallocate Position Horizontal
106	Position Adjustment from Auth
107	Reallocate Position Differential
108	Remove Position Differential
109	Abolish Position
110	Source of Position's Funds Change
111	Position Budgeted Salary Change
112	Legislative Increase for Position
113	Position Transfer
114	Salary Adjustment Fund
115	Position Hours Change
116	Position Employee Group/ Subgroup Change
118	Position Competency Level Change
120	Agency Consolidation / Agency Separation
121	Reallocate Pay Plan Change

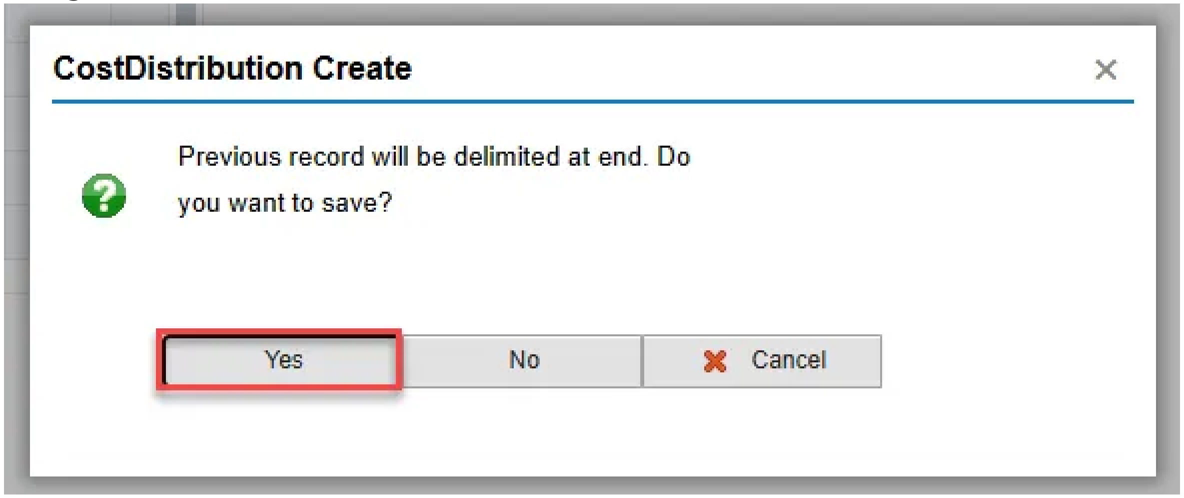
38 Entries found

Step 13. Click the **Continue** button.

Step 14. Click **Save** on the Copy Cost Distribution screen.

Step 15. Click **Yes** in the pop-up window.

Image

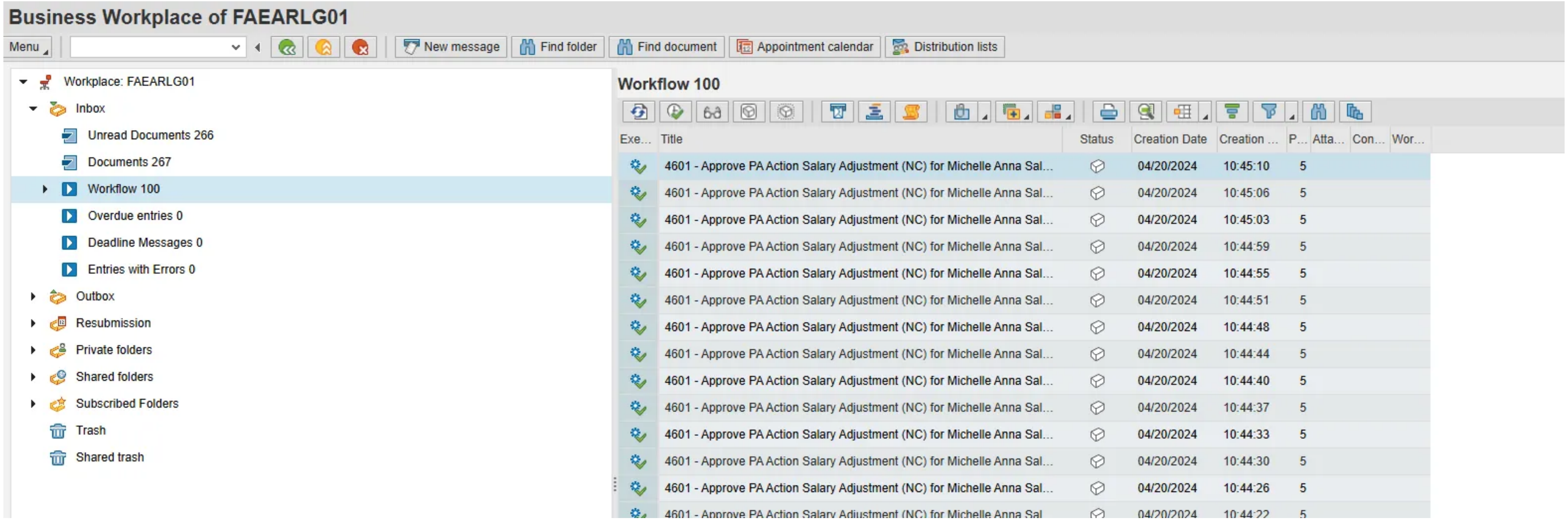


By delimiting the previous record, you have created history for this position!

Step 16. You can close the Maintain Position screen, or you can leave it open to use again if you have more PCRs to review.

Step 17. Return to your PCR list and execute the PCR for which you previously viewed the header.

Image



Step 18. On the pop-up window, click into the **Cost** tab and ensure that your change is reflected in the data.

Image

Employee Action Request - Funding

Menu

PCR Number	1000005559	Action Type	ZC Salary Adjustment (NC)	Changed by	INOTPATEL800
Personnel No.	10000151 Michelle Anna Salazar 01	Reason	23 Performance Increase	Modified on	04/20/2024
Last 5 dig SSN		Effective on	04/20/2024	Status	A

General | Cost

Total Budgeted Amount 52,174.00

Action/Reason Code 30

Master cost center 4699999999 CULTURE RESOURCES

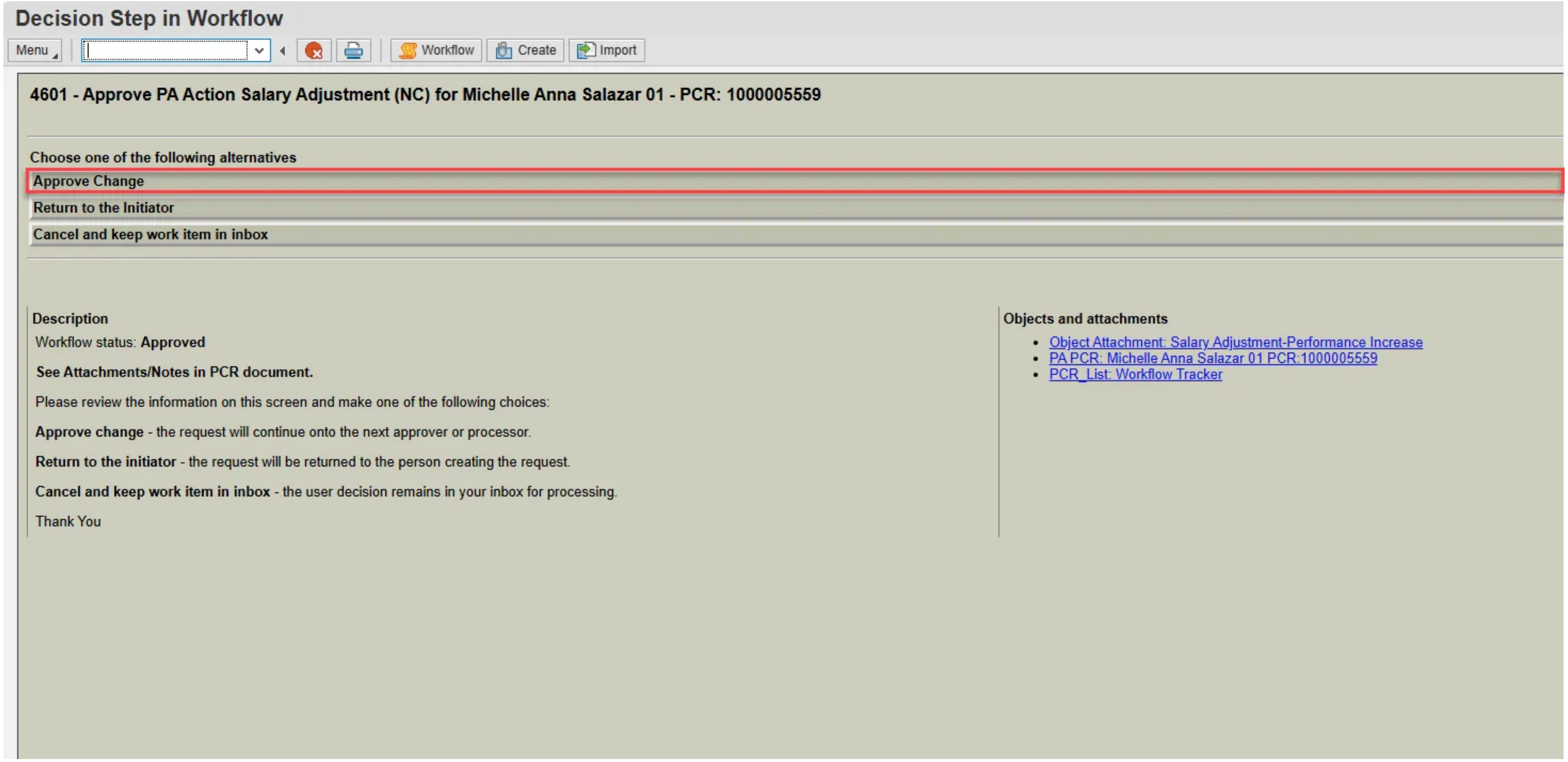
Cost distribution

COAr	Cost ctr	Order	WBS element	Name	Pct.	Nam
NC01	4610000000	100000005406		ADMINISTRATION	100.00	4601

Entry 1 Frm 1

Step 19. Click the **Back** button to return to the Decision Step in Workflow Screen. Click **Approve Change**.

Image



Step 20. The system task is complete.

First Published

Thu, 01/27/2011

Last Updated

Mon, 02/16/2026

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