

PER-57 Copying Notes from the PCR to Infotypes

Purpose

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 can 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

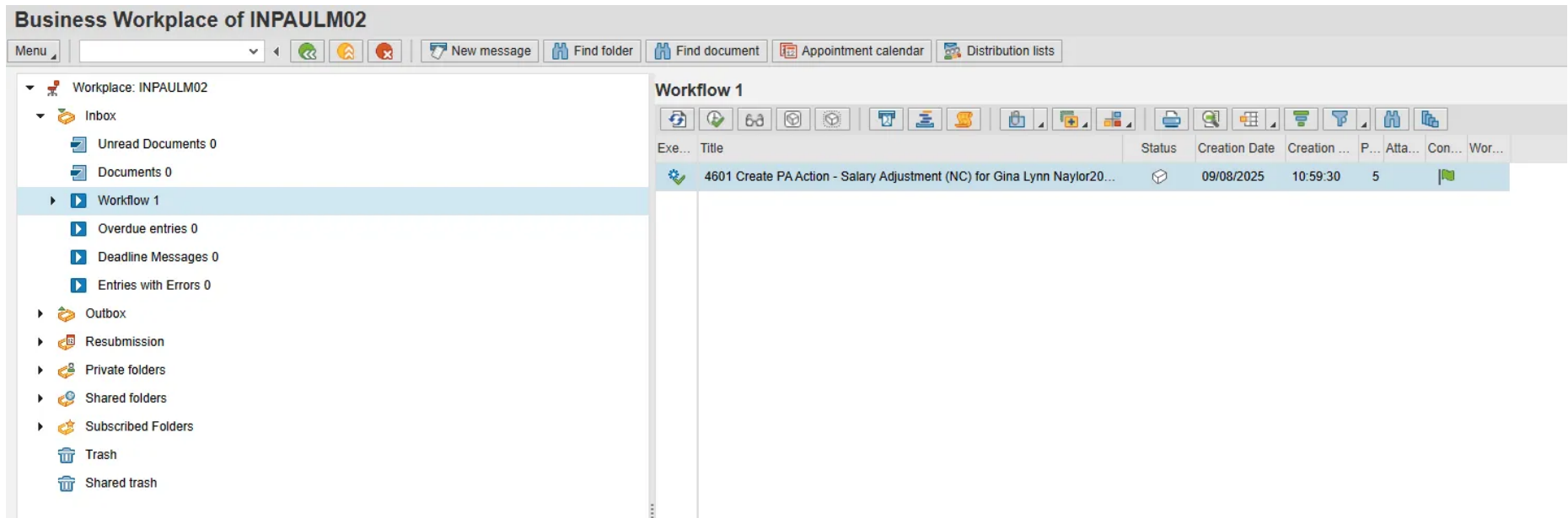
Via Menu Path: SAP Menu > Office > SBWP – Workplace > Inbox > Workflow

Via Transaction Code: N/A

Procedure

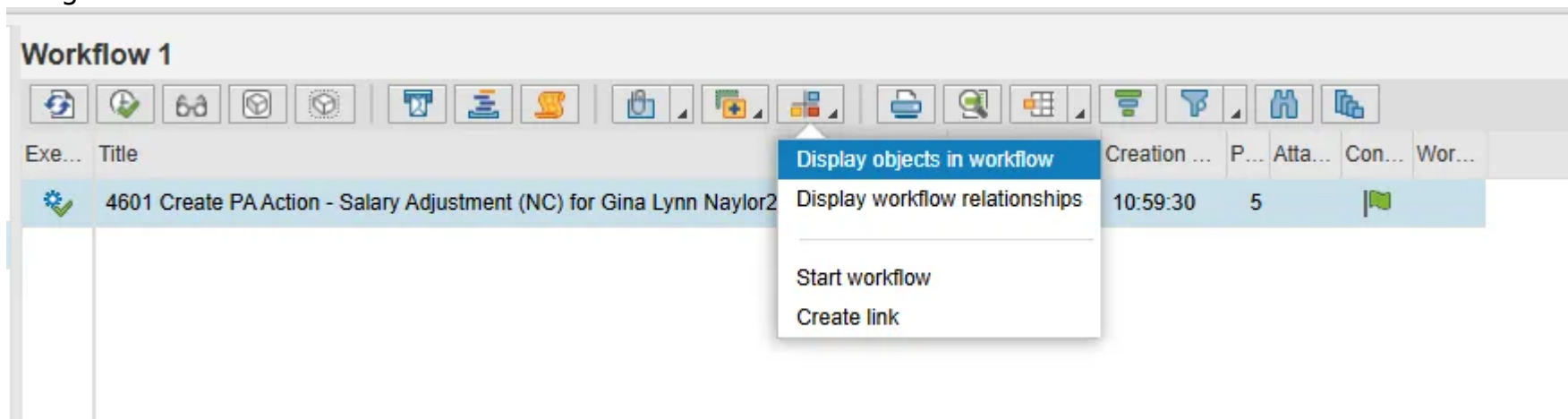
Begin the copy process on the Business Workplace of the Workflow Initiator. There are 17 steps to complete this process.

Image



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

Image



Step 2: Click the Environment button and choose Display objects in workflow from the drop-down menu.

Image

Choose an object (1)

×

▶

Restrictions



▼

Number	Object	Object Name
0001	Personnel Action Change Request (PCR)	Gina Lynn Naylor20 PCR:1000005746
0002	PCR/OM Request list of approvers	Workflow Tracker
0003	Office Document	Create an appropriate title

<

...

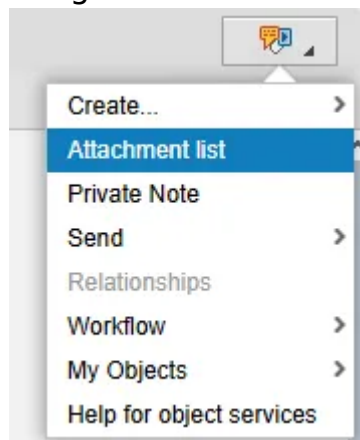
>

3 Entries found



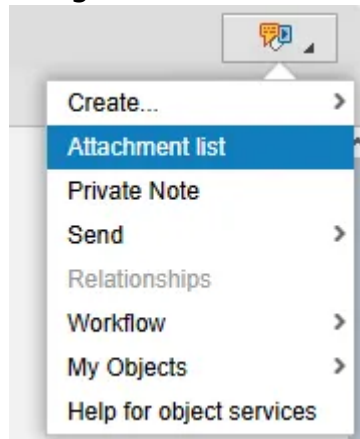
Step 3: Double-click the Workflow Header. It contains the PCR number.

Image



Step 4: Click Services for Object and choose Attachment list from the drop-down menu.

Image



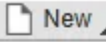
Step 5: Click **Attachment list**.

Image

Service: Attachment list



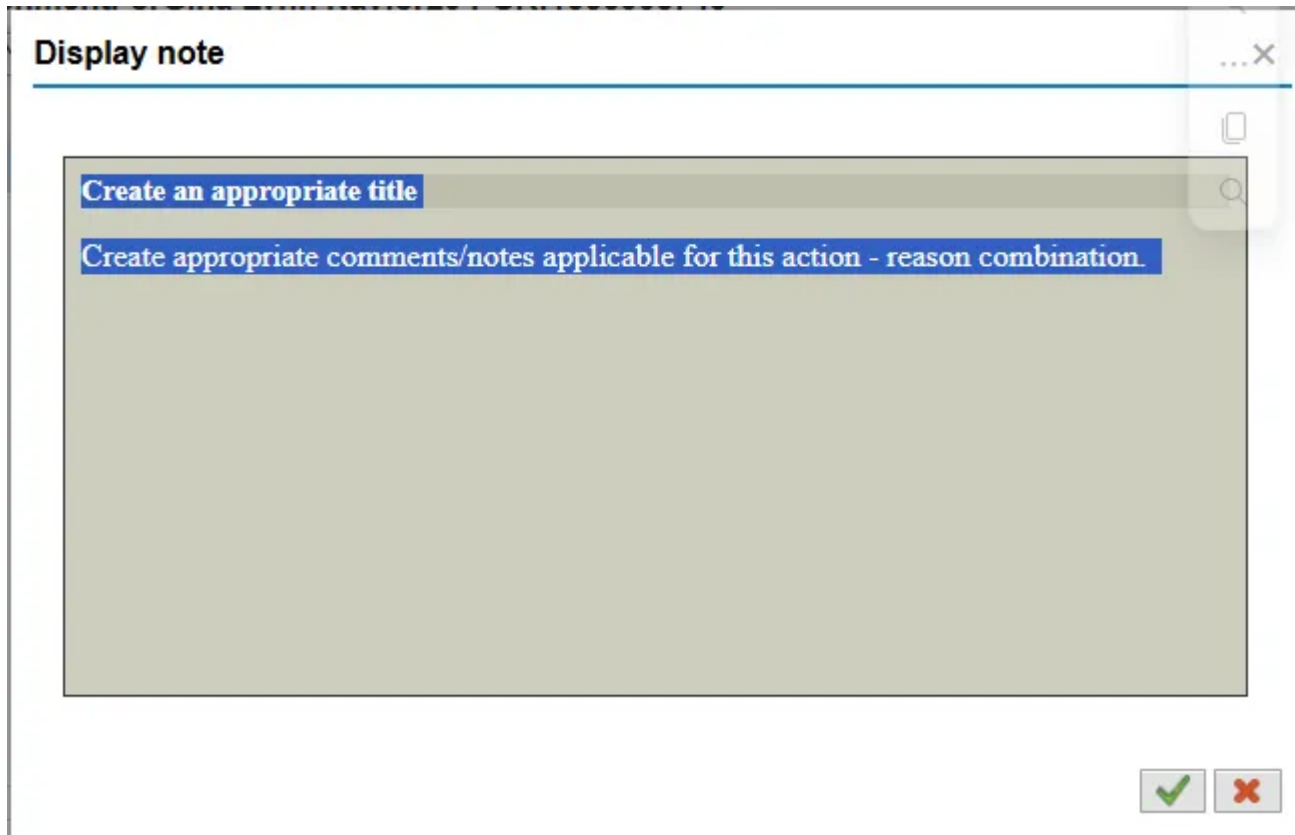
AttachmentForGina Lynn Naylor20 PCR:1000005746

            			
Icon	Title	Created By	Created On
	Create an appropriate title	INPAULM02	09/08/2025



Step 6: Double-click on the desired **attachment**. The attachment is displayed.

Image



Step 7: Highlight the contents of the note and copy the information to your computer's clipboard. You can use control + c or right-click copy.

Image

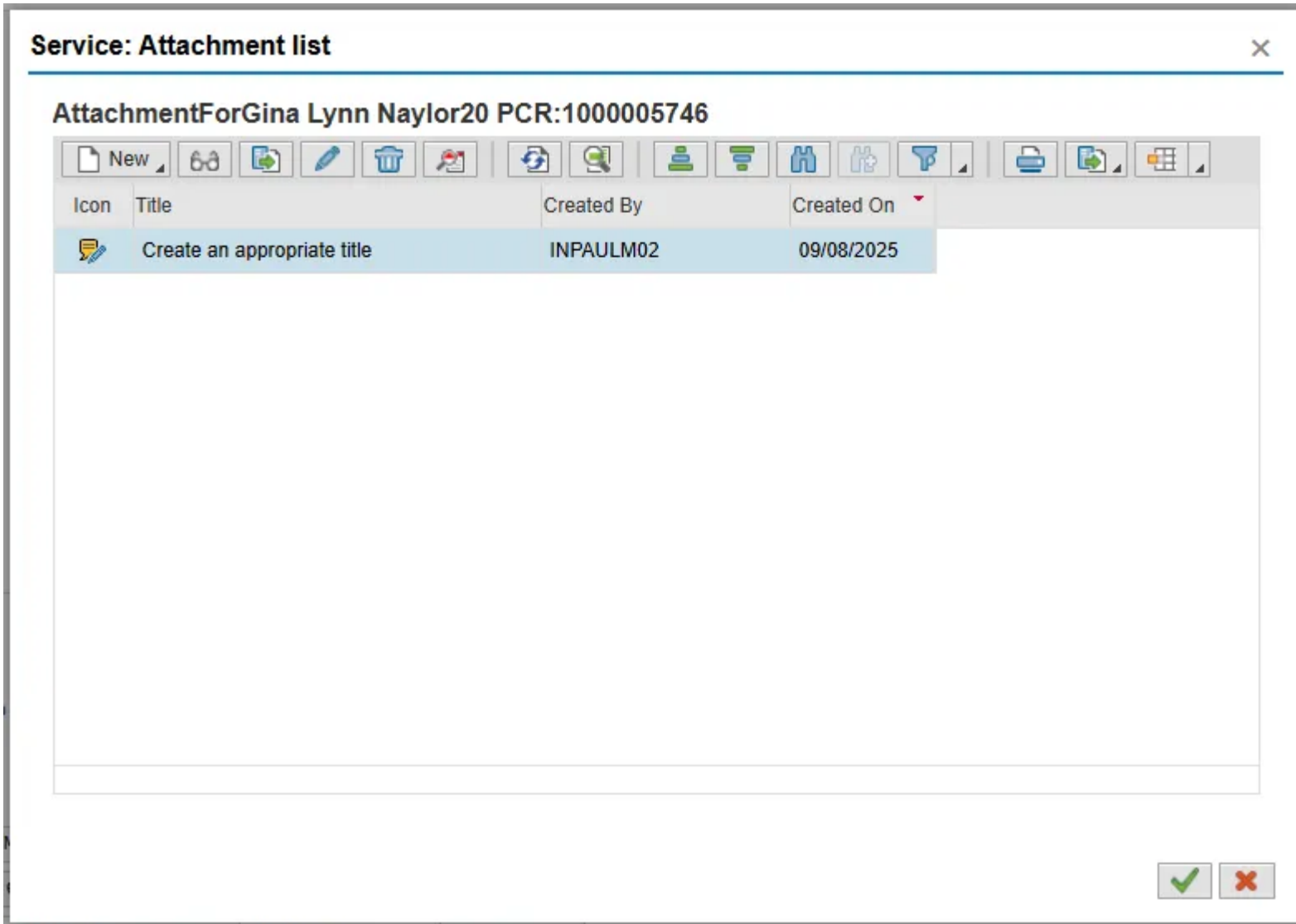
Create an appropriate title

Create appropriate comments/notes applicable for this action - reason combination.

Step 8: Click the **Red X** to close the attachment window.

Image



Step 9: Click the **Red X** again to close the Services for Objects attachment window.

Image

Employee Action Request

Menu



PCR Number

1000005746

Personnel Number

10000110 Gina Lynn Naylor20

Action:

ZC

Salary Adjustment (NC)

Last 4 digits(SSN)

Reason:

12

In-Range - Higher Level

Effective on

09/08/2025

Chng

09/08/25

INPAULM02

St:

A

Approved

CURRE...

Pers.Area

4601

Natural and Cultural Resources

Subarea

NC01

7day Norm

EE Group

A

SPA Employees

EE Subgroup

A2

FT N-FLSAOT Prob

Org. Unit

20010281

CR CDS ST LIBRARY ADID Te

Job

32000330

Systems Consultant

EE Position

65002016

Systems Consultant

PROPOS...

Pers.Area

4601

Natural and Cultural Resources

Subarea

NC01

7day Norm

EE Group

A

SPA Employees

EE Subgrp

A2

FT N-FLSAOT Prob

Org. Unit

20010281

CR CDS ST LIBRARY ADID Te

Job

32000330

Systems Consultant

EE Position

65002016

Systems Consultant

Basic Pay

Pay Scale type

07

General

Pay Scale Area

01

Annual Salaries

Pay Scale Group

GN12

Level

01

Pay Scale type

07

General

Pay Scale Area

01

Annual Salaries

Pay Scale Group

GN12

Level

02

Annual Salary

51,000.00

Hrly Sal

0.00

Calc Step - -MP

Annual Salary

56,220.00

Hourly Salary

0.00

Calc Step - MIN

10.24

Min

56,220.00

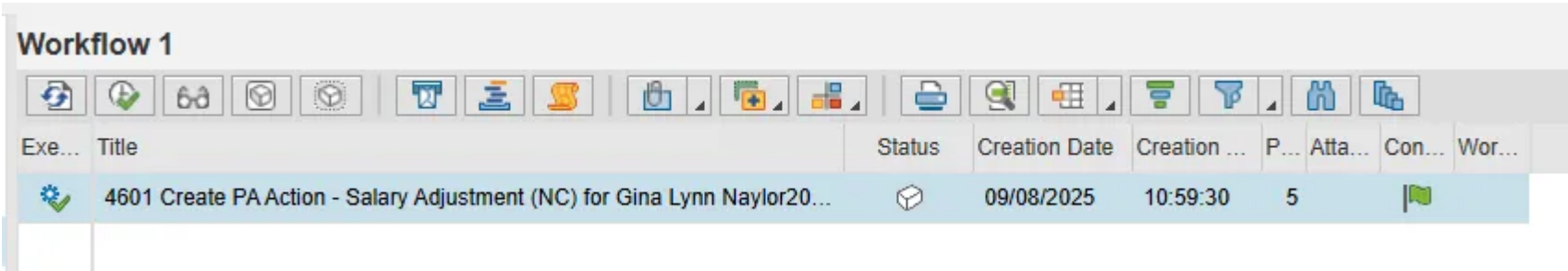
Max

63,552.00

Next Inc Date

Step 10: Click **Green back arrow** to return to the PCR.

Image



Step 11: Double-click the **selected PCR** or click on the **Execute** button.

Image

Personnel Actions

Menu



Personnel no.

10000110

Name

Gina Lynn Naylor20

EEGroup

A

SPA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

A2

FT N-FLSAOT Prob

CostC

4699999999

CULTURE RESOURCES

From

09/08/2025

Personnel Actions

Action Type	Personne...	EE group	EE subgr...	
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)				

Step 12: Enter the **effective date** of the action in the From field (should be same as PCR).

Step 13: Click on the gray box to the left of the **action** you wish to process. (This example uses the Salary Adjustment action.)

Step 14: Click the **Execute** button. The Actions infotype is displayed.

Image

Copy Actions (0000)

Menu

Infotype

Edit

Goto

Extras

System

Help

SAP GUI for HTML File Browser

Settings...

About SAP GUI for HTML

Create (F5)

Change

Copy

Delete

Maintain text (F9)

Display text

Cancel (Escape)



Execute info group

Change info group

SA 4601 Natural and Cultural Resources

Reason for Action

12

In-Range - Higher Level

Status

Customer-specific



Employment

3 Active



Special payment

1 Standard wage type



Organizational assignment

Position

65002016

Systems Consultant

Personnel area

4601

Natural and Cultural Resources

Employee group

A

SPA Employees

Employee subgroup

A2

FT N-FLSAOT Prob

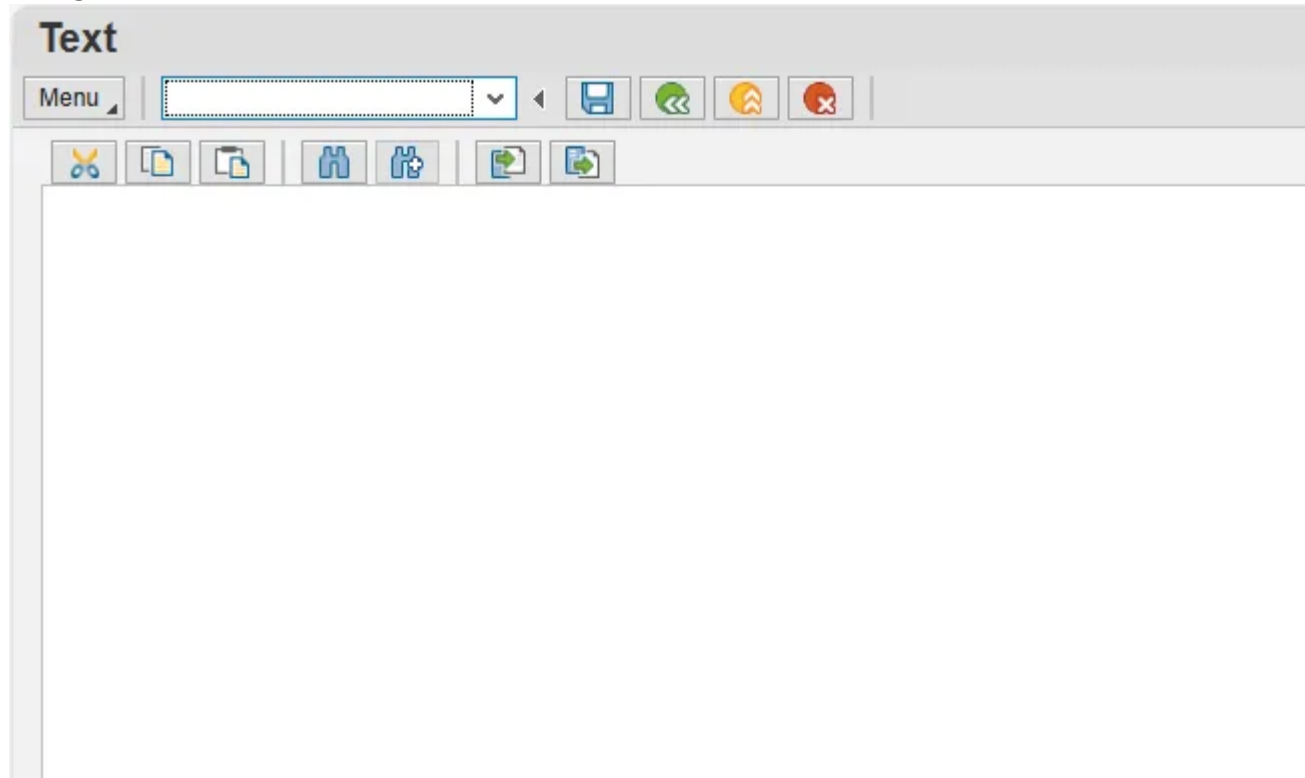
Additional actions

Start Date	Act.	Action Type	ActR	Reason for action	

Step 15: Click **Menu > Edit > Maintain text**. A dialog box is displayed.

Note: If the dialog box screen does not display, try clicking Enter until it displays.

Image



Step 16: In the text box area, right-click and select **Insert Text**. Text is pasted into the text box.

Image

Text

Menu    

Note will be inserted/pasted here.

Step 17: Click the **Save** button. The Actions infotype screen displays again, now with an icon indicating that there are comments attached to this infotype.

Image

Copy Actions (0000)

Menu         Execute info group  Change info group

Pers.No.

Name

EEGroup SPA Employees PersA Natural and Cultural Resources

EESubgroup FT N-FLSAOT Prob

Start  12/31/9999 

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

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Wed, 02/04/2026

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