

WF-09 Workflow Approval

Purpose

The purpose of this Business Process Procedure is to explain how to approve a Work Item in the Integrated HR-Payroll System.

For the procedure on how to reject an item, use this document instead: Workflow Rejection Process

Trigger

A PCR (Personnel Change Request) workflow item has arrived in your SAP Inbox for review.

Business Process Procedure Overview

All PCRs initiated/requested via workflow will go through an approval process. Depending on the action being processed (type of personnel action such as New Hire or Separation), different levels of approval are required. The levels of approval may include Division, Agency, OSHR or Funding.

Review the data within the PCR, add any comments as appropriate using the Services for Objects functionality (notes/attachments/URLs), and either approve or reject the PCR. If you approve the PCR, it will be sent to the next defined stage of the approval process.

Tips and Tricks

SAP Business Workplace Inbox Functionality

- The SAP Business Workplace inbox is where all workflow documents will be initiated/requested, and where all workflow documents will arrive for approvers to review and respond.
- For more information on the SAP Business Workplace, including an overview of all Tree Functions (folders, organization of the workplace), see the Business Workplace Overview Tree Functions Job Aid on the OSC Training Help website. (See Additional Resources section at the end of this document.)

Access Transaction

Via Transaction Code: SBWP

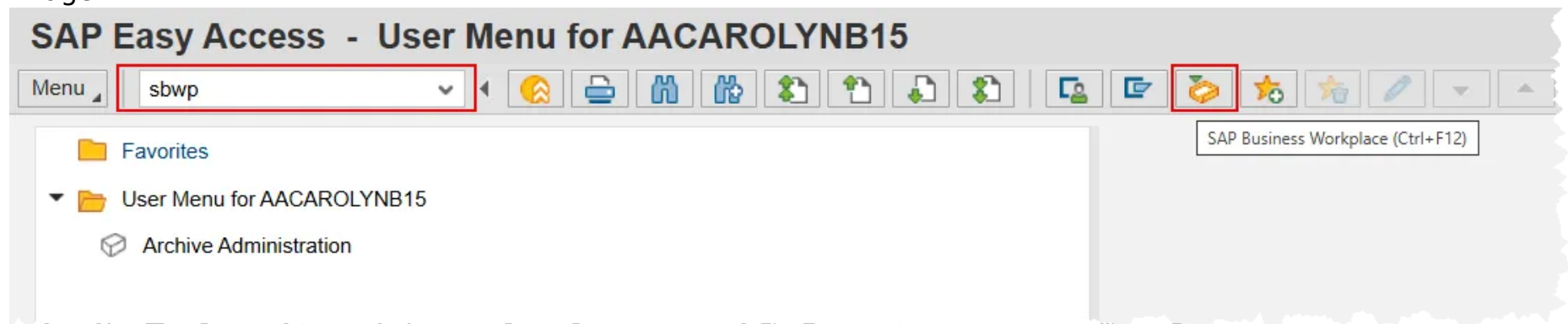
Click the **SAP Business Workplace** button. (see step 1).

Procedure

There are 9 steps to complete this process.

Step 1. Either click the **SAP Business Workplace** button or type **sbwp** in the command field and press enter.

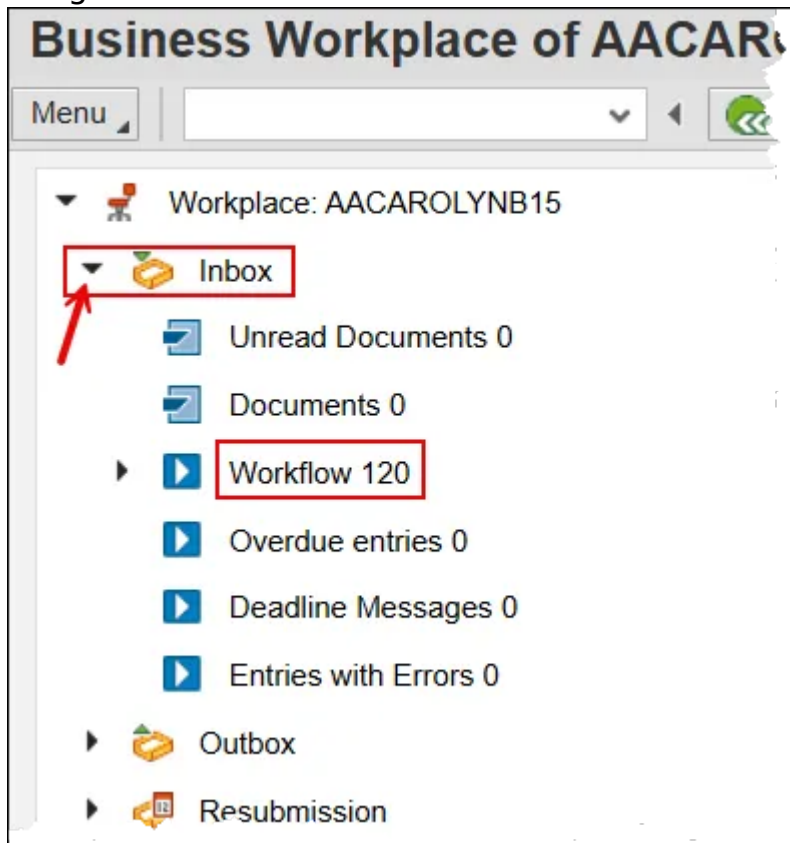
Image



Step 2. Click on the **node (triangle)** next to Inbox then click on the word **Workflow #** in the resulting list. The number represents the amount of Work Items awaiting review.

Although clicking on the word Inbox will produce Work Items to review, the button bar will be missing the **Environment** button, which is where you will access the **Workflow Header**. Following the instruction above will give you a list of Work Items and the Environment button.

Image



Step 3. Identify and double click the **PCR** which needs your attention. In the below example, we will be using PCR 100005711. You can also single click the **PCR** and then click the **Execute** button.

Image

The screenshot displays the 'Business Workplace of AACAROLYNB15' interface. On the left, a navigation pane shows the 'Inbox' with 'Workflow 120' selected. The main area, titled 'Workflow 120', contains a table of PCR entries. The table has columns for 'Exe...', 'Title', 'Execute', 'Status', 'Creation Date', 'Creation ...', 'P...', and 'Atta...'. The 'Execute' column is highlighted with a red box. The table lists 9 PCR entries, each with a title starting with '4601 PAAction - Salary Adjustment (NC) for Dianne Burger' followed by a number (01 to 09) and a PCR number (1000005706 to 1000005714). The 'Status' column shows a cube icon for each entry. The 'Creation Date' is '04/22/2024' for all entries. The 'Creation ...' column shows times ranging from 16:33:30 to 16:32:42. The 'P...' column shows the number '5' for all entries. The 'Atta...' column is empty.

Exe...	Title	Execute	Status	Creation Date	Creation ...	P...	Atta...
✓	4601 PAAction - Salary Adjustment (NC) for Dianne Burger01	PCR: 1000005706	✓	04/22/2024	16:33:30	5	
✓	4601 PAAction - Salary Adjustment (NC) for Dianne Burger02	PCR: 1000005707	✓	04/22/2024	16:33:21	5	
✓	4601 PAAction - Salary Adjustment (NC) for Dianne Burger03	PCR: 1000005708	✓	04/22/2024	16:33:15	5	
✓	4601 PAAction - Salary Adjustment (NC) for Dianne Burger04	PCR: 1000005709	✓	04/22/2024	16:33:08	5	
✓	4601 PAAction - Salary Adjustment (NC) for Dianne Burger05	PCR: 1000005710	✓	04/22/2024	16:33:02	5	
✓	4601 PAAction - Salary Adjustment (NC) for Dianne Burger06	PCR: 1000005711	✓	04/22/2024	16:32:56	5	
✓	4601 PAAction - Salary Adjustment (NC) for Dianne Burger07	PCR: 1000005712	✓	04/22/2024	16:32:52	5	
✓	4601 PAAction - Salary Adjustment (NC) for Dianne Burger08	PCR: 1000005713	✓	04/22/2024	16:32:47	5	
✓	4601 PAAction - Salary Adjustment (NC) for Dianne Burger09	PCR: 1000005714	✓	04/22/2024	16:32:42	5	

The list of PCRs has several columns. Some that are returned by default include **Title**, **Status**, **Creation Date**, & **Creation Time**. These columns can be reordered and resized. Columns can be removed from the display and other columns not currently being displayed can be added to the results. See [WF-14](#) for further information on these processes.

Step 4. Click on the **Workflow Header**. It is always the second link from the bottom in the 'Objects and attachments' area and will include the PCR number.

Image

Decision Step in Workflow

Menu

Workflow

Create

Import

4601 PA Action - Salary Adjustment (NC) for Dianne Burger06 PCR: 1000005711

Choose one of the following alternatives

Approve Change

Return to the Initiator

Cancel and keep work item in inbox

Description

Workflow status: **In Process**

See Attachments/Notes in PCR document.

Please review the information in this screen and make one of the following choices:

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

Return to the initiator - the request will be returned to the person creating

Objects and attachments

- [Object Attachment: Salary Adjustment](#)
- [PA PCR: Dianne Burger06 PCR:1000005711](#)
- [PCR_List: Workflow Tracker](#)

Step 5. Review the PCR details as appropriate.

Image

Employee Action Request



Menu



PCR Number 1000005711

Personnel Number 80000555 Dianne Burger06

Action: ZC Salary Adjustment (NC)

Last 4 digits(SSN)

Reason: 01 Salary Adjustment

Effective on 04/01/2024

chnng 04/21/24 INOTPATEL800 st: N In Process

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 SPA Employees

EE Group A SPA Employees

EE Subgroup A1 FT N-FLSAOT Perm

EE Subgrp A1 FT N-FLSAOT Perm

Org. Unit 20010337 CR CDS A&H MOH Museum of

Org. Unit 20010337 CR CDS A&H MOH Museum of

Job 32000719 Regional History Museum A

Job 32000719 Regional History Museum A

EE Position 65001719 Administrator Museum Of The Cap...

EE Position 65001719 Administrator Museum Of The Cap...

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 NC15 Level 01

Pay Scale Group NC15 Level 01

Annual Salary 51,616.00 Hrly Sal 0.00

Annual Salary 56,777.00 Hourly Salary 0.00

Calc Step - MIN

Calc Step - -MP 10.00

Min 51,616.00

Max 61,294.00 Next Inc Date

Notes:

PA work items will all have the same look. The left hand side will display current employee data (and will be blank for New Hire actions). The right hand side will display the proposed new data, some of which may be the same as current.

OM work items are dependent on the action being proposed. Similar to PA actions, most OM actions will have current data in a column on the left and proposed new data on the right. The notable exception to this standard is a Create New Position action since there is no current data to display. Each OM action will display the various fields that may be changed as part of the action. Some of these fields may appear on different tabs. Each of the fields is clearly labeled and there will be no question as to what data is being shown.

The picture below is an example of a Reallocate Position action with the **General**, **Time**, and **Cost** tabs highlighted.

Image

Reallocate Position Horizontal - WORK FLOW WAITING FOR COMPLETION

Menu

Position Header

Position

65002232

chivist III

PCR Number

5000002364

Valid from

01/01/2024

to

12/31/9999

Holder

80000810

Barbara Phillips16

Personnel area

4601

Natural and Cultural Resources

Org Unit

20010150

CR CDS A&H HIS RES A&R ST AR Spec ...

Reports To

60083339

Archivist Supervisor

Supervisor

WF Status

A

Approved

General

Time

Cost

Current Values

New Values

Position Relationships

Position abbr.

800904001059

Position Name

Archivist III

Job

30001550

Archivist III

SOC Code

254011

Archivists

Reports To

60083339

Archivist Supervisor

Archlglist

Archaeologist

32000697

Archaeologist II

193091

Anthropologists and Archeologists

60083339

Archivist Supervisor

Employee Group/Subgroup

Employee group

A SPA Employees

EE subgroup

A1

FT N-FLSAOT Perm

A SPA Employees

A1

FT N-FLSAOT Perm

Step 6. Locate the note provided by the initiator by clicking on the **Services for Object** button and choosing **Attachment List** in the resulting dropdown menu. If Attachment List is grayed out, then a note has not been attached. Initiators are required to include, and complete a note template for every action submitted to Workflow. If the note has not been attached, then the PCR should be rejected (barring an exceptional situation).

The **Services for Object** button can be found on the top right of your SAP screen.

Image

The screenshot displays the 'Employee Action' form. On the left, there is a sidebar with a 'Menu' button and several input fields: 'PCR Number', 'Personnel Number', 'Last 4 digits(SSN)', and 'Effective on'. Below these is a 'Pers.Area' field with the value '4601'. The main form area contains fields for 'Action' (ZC), 'Reason' (01), 'St' (N), and 'In Process'. A dropdown menu titled 'Services for Object' is open, showing options: 'Create...', 'Attachment list' (highlighted with a red box), 'Private Note', 'Send', 'Relationships', 'Workflow', 'My Objects', and 'Help for object services'. The bottom of the form shows 'CUR' and 'ROPOS...' fields, and a 'Natural and Cultural Resources' label.

Step 7. Double click the note(s) you wish to read. Ensure that the initiator has used the OSHR designed template and that it is completed. The note may provide information that will help you to determine whether or not the action should be approved or rejected. (The image below is from the training database and only an empty template has been attached.)

Once you have reviewed an individual attachment, close it by clicking on the cancel button (red 'X'). Once you have reviewed all the attachments you wish, close the Attachment list pop-up by clicking the cancel button (red 'X').

Image

Service: Attachment list



AttachmentForDianne Burger06 PCR:1000005711

Icon	Title	Created By	Created On
	Salary Adjustment	INOTPATEL800	04/21/2024



Display note



Salary Adjustment

Salary Adjustment-01

PCR#

Today's Date

Initiator Name/PNR-Completing Action

EE Name/PNR

Action Eff Date

Reason for retro, if applicable

Justification of Salary Adjustment

Salary change (Current Salary + % = New Salary)

Qualifications and salary administration policy used

Address Equity Considerations

Approvals/Delegation – Indicate OSHR Approval if applicable



Cancel (Escape)



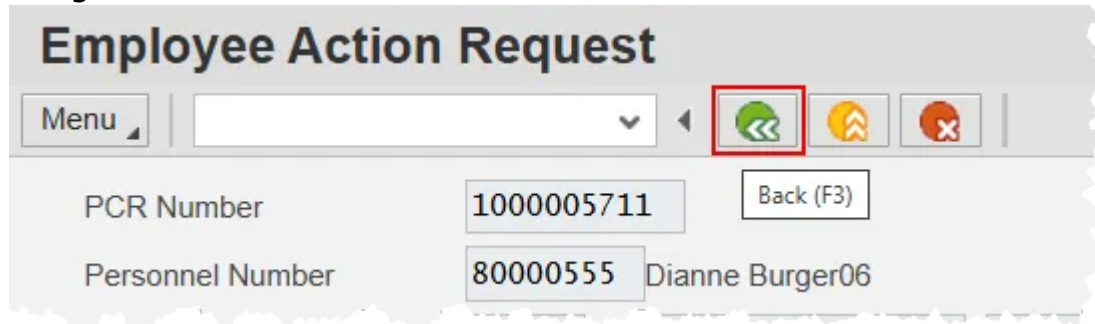
Cancel (Escape)

Services for Objects are available on all Personnel Administration actions and allows you to link critical business documents to the PCR or an action. You may add notes, attachments, or hyperlinks on a PCR and/or an action.

- If a note, attachment or URL has been added, the **Attachment list** option will be live (it is grayed out in the list if there are no attachments). Click on **Attachment list** to view one or more items.
- As an approver, you have the option to create a note as well. When you click on the **Services for Object** button, choose the **Create note** option. Provide a title, write your note and then click the green check to save. If you will be rejecting the Work Item, this step will be mandatory and is detailed in this help doc: [Workflow Rejection Process](#).
- A **Private note** will be viewable by you only, using your user ID. It will follow the PCR or action, but no one else will be able to view it.

Step 8. When you have completed your review of the Workflow Header and any attached notes and/or documents, return to the **Decision Step** screen by clicking the green **Back** button.

Image



The screenshot shows the 'Employee Action Request' form. At the top, there is a title bar with the text 'Employee Action Request'. Below the title bar, there is a navigation area with a 'Menu' button, a search bar, and three icons: a green double arrow pointing left (highlighted with a red box), a yellow arrow pointing up, and a red circle with an 'X'. Below the navigation area, there are two input fields: 'PCR Number' with the value '1000005711' and 'Personnel Number' with the value '80000555'. To the right of the 'Personnel Number' field, the text 'Dianne Burger06' is displayed. A 'Back (F3)' button is located to the right of the 'PCR Number' field.

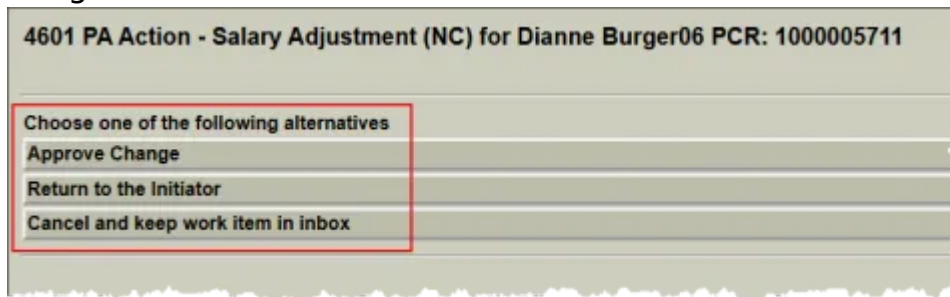
Step 9. Click the appropriate decision.

If you choose the **Approve change** option, the Work Item will go to the next level of approval or be returned back to the initiator for processing (depending on your specific role and the category of the Work Item). This choice will also complete the process for the chosen work item.

If you don't wish to approve nor reject the PCR at this time, choose the **Cancel and keep work item in inbox** button. The PCR is not canceled. Instead, it is returned to your inbox in an **In Process** status. This status indicates that the PCR will appear only in your inbox. Once you have enough information to either approve or reject the item, you can double click it to be brought back to the Decision Step screen.

Finally, you may choose the **Return to the Initiator** option. This is the choice to make when there is incorrect data in the request or it otherwise needs to be rejected and there are a couple of extra steps to follow. See [WF-16](#) for the full procedure.

Image



First Published

Wed, 12/11/2013

Last Updated

Fri, 01/30/2026

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