Administer HR Transactions

SAPweb HR Transactions
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October, 2010
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HR Transaction Inbox
## 1-A : HR Transaction Inbox Overview

Based on your authorization, the HR Transaction Inbox will provide you with the following features:

<table>
<thead>
<tr>
<th>Authorization</th>
<th>HR Transaction Inbox</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initiator</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Active Transactions</strong> – HR Transactions, which have not been processed in SAP, created by the user are listed with current status.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Transaction History</strong> – A 30-day history of Transactions initiated by the user, which were processed in SAP.</td>
</tr>
<tr>
<td><strong>Approver</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Active Transactions</strong> – HR Transactions, which have not been processed in SAP, created by the user are listed with current status.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Active Transactions</strong> – HR Transactions with status Pending Approval, which the Approver may access, and then Approve or Reject.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Transaction History</strong> – A 30-day history of HR Transactions initiated or approved by the user, which were processed in SAP.</td>
</tr>
<tr>
<td><strong>HRO</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Active Transactions</strong> – HR Transactions with status Pending Approval, which the HRO may access, and then Approve or Reject.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Transaction History</strong> – A 30-day history of Transactions approved by the user, which were processed in SAP.</td>
</tr>
</tbody>
</table>

## 1-B : Access the HR Transaction Inbox

To Access HR Transaction Inbox:

1. Click on the Employees Tab.
2. Under the heading HR Transactions > Administer, click the **HR Transaction Inbox** link.
1-C : View Active Transactions

**Active Transactions** will display in the upper part of the *HR Transaction Inbox* screen. Active Transactions are those that have not yet been processed in SAP by the HR-Payroll Service Center. For each transaction the Transaction #, Employee Name, MIT ID, Type (i.e. Termination), Submitted (date), Effective (date), Department, and Status are listed. The transactions may be sorted using the ▼▲ symbols.

►To View, Sort, or Cancel Active Transactions you Created:

1. In the upper part of the *HR Transaction Inbox* screen, view the list of **Active Transactions**.
2. Transactions may be sorted using the ▼▲ symbols next to each of the column headings.
3. To View the HR Transaction details, click on the Transaction # link for the specific HR Transaction.
4. To **Cancel** an HR Transaction that you initiated, it must have a Pending Approval status. Click on the trashcan symbol next to the Transaction number. Canceling an HR Transaction will delete it from all inboxes.

![Active transactions table]

**Active transactions**

<table>
<thead>
<tr>
<th>Transaction #</th>
<th>Employee Name</th>
<th>MIT ID</th>
<th>Type</th>
<th>Submitted</th>
<th>Effective</th>
<th>Department</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>000001941</td>
<td>Hashtag</td>
<td>98624715</td>
<td>Extend appointment</td>
<td>10/27/2010</td>
<td>01/21/2011</td>
<td>Biology</td>
<td>Pending Approval by Training instructor 4</td>
</tr>
<tr>
<td>000001940</td>
<td>Hdyemy</td>
<td>919003000</td>
<td>Salary Supplement</td>
<td>10/27/2010</td>
<td>11/02/2010</td>
<td>Biology</td>
<td>Pending Approval by Training instructor 4</td>
</tr>
</tbody>
</table>
**1-D : Active HR Transaction Approval**

**HROs, Dean's Office and DLC Approvers** who are assigned an HR Transaction for approval will receive Email notification containing the Transaction number, a summary of the Transaction, and a link to the SAPweb HR Transaction Inbox. The Transaction will appear listed in the Active Transactions section of the HR Transactions Inbox with the status **Pending Approval**.

For each transaction the **Transaction #**, **Employee Name**, **MIT ID**, **Type** (i.e. Termination), **Submitted** (date), **Effective** (date), **Department**, and **Status** are listed. The transactions may be sorted using the ▼▲ symbols. Clicking on the **Transaction #** of HR Transaction listed under Active Transactions will open HR Transaction Details.

▶ To Approve or Reject Active Transactions:

1. In the upper part of the **HR Transaction Inbox** screen, view the list of **Active Transactions**.
2. The transactions may be sorted using the ▼▲ symbols next to each of the column headings.
3. To **Approve** or **Reject** a Transaction, click on the **Transaction #** link for the specific Transaction with **Pending Approval** status.

4. The **Transaction for <Name>, <MIT ID>** window will open displaying Transaction Details.
5. Click the **Approve** button to approve the Transaction. You may add comments (not actions for the Payroll Service Center) as needed.
6. Click the **Reject** button to prevent further processing of the Transaction and return it to the Initiator. In the textbox labeled **If rejecting, enter reason**, you are required to enter a reason for the rejection for the Initiator of the Transaction.
SAMPLE Transaction Details Key

1. **Employee Details**
   - Date of Birth, Citizenship, etc.
   - Appointment Details
     - (Change and Extend Appointment only)

2. **Transaction Details**
   - Summary of Transaction data submitted when initiated. May include:
     - Job, Position Number/Title
     - Position numbers delimited – if selected Yes to delimit position
     - Department
     - Effective Date(s)
     - Salary, Rate of Pay,
     - Cost Object(s)
     - Faculty Sponsor
     - Additional Pay Details (Change and Extend Appt. only)
     - Reason for Transaction
     - Rehire / Reappoint

3. **Additional Pay Details (Academic only)**
   - Fiscal Year charge Dates
   - Monthly Gross Pay
   - Total Pay/Charge for FY

4. **Comments/Justification**

5. **Administrative Details**
   - Prepared by – Name and email address of person who initiated Transaction
   - Approver(s), HRO

6. **If rejecting, enter reason/Comments**
   - Visible only to HRO or Approver
   - Comments – Comments are required if you Reject a Transaction. You may add Comments if you Approve the transaction.

7. **Approve / Reject**

**Note:** Initiator will receive email notification if a Transaction is Rejected, including Reason for Rejecting.
1-E: Transaction History

Transaction History, which displays in the lower portion of the screen, provides a 30-day history of Transactions created or approved by the user that have been processed in SAP by the HR-Payroll Service Center.

To View Transaction History:

1. In the lower part of the HR Transaction Inbox screen, view the 30-day Transaction History of processed transactions.
2. The transactions may be sorted using the ▼▲ symbols next to each of the column headings.
3. To view details of a processed Transaction, click on the Transaction # link for the specific Transaction.

<table>
<thead>
<tr>
<th>Transaction #</th>
<th>Employee Name</th>
<th>MIT ID</th>
<th>Type</th>
<th>Submitted</th>
<th>Effective</th>
<th>Department</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>600000493</td>
<td>Larissa_test2,Srs</td>
<td>9299997409</td>
<td>Termination</td>
<td>3/23/09</td>
<td>3/27/09</td>
<td>Biology</td>
<td>Processed</td>
</tr>
<tr>
<td>600000863</td>
<td>Alkabhalakim,Alissa</td>
<td>9249910887</td>
<td>Termination</td>
<td>3/31/09</td>
<td>3/31/09</td>
<td>Biology</td>
<td>Processed</td>
</tr>
</tbody>
</table>
2

View a HR Transaction
2-A : View an HR Transaction

The View a Transaction function allows a user to search HR Transactions within their authority. Transactions may have a status of Pending, Processed, or Rejected. You may view the Transaction Details of a Transaction in the search results.

To View a Transaction:

1. Click on the Employees Tab.
2. Under the heading “HR Transactions,” click the View a Transaction link.
3. The Search for a Transaction screen will display. The search is limited to Transactions that you have authorization to view. Search by entering data in one or more of the available search fields:

   - **Transaction #**
   - **Transaction Type** – select Transaction from pull-down list.
   - **Employee Name** – search by First Name, Last Name, or a combination.
   - **Employee MIT ID** – Enter entire MIT ID
   - **Effective Date** – Use pop-up calendar to format mm/dd/yyyy
   - **Submission Date** – Use pop-up calendar to enter range of dates in mm/dd/yyyy format.

4. Click the Search button.
5. Results matching the search criteria to which you have access authorization are listed in a table. If there is no match, SAP presents the message 'No search results were found'.
6. Click on a Transaction # link of an HR Transaction to view details.