IS&T Training

10

# Administer HR Transactions

**SAPweb HR Transactions**

# Table of Contents



October, 2010

# 1

# HR Transaction Inbox

# 1-A : HR Transaction Inbox Overview

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

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

# 1-B : Access the HR Transaction Inbox

### ▶To Access HR Transaction Inbox:

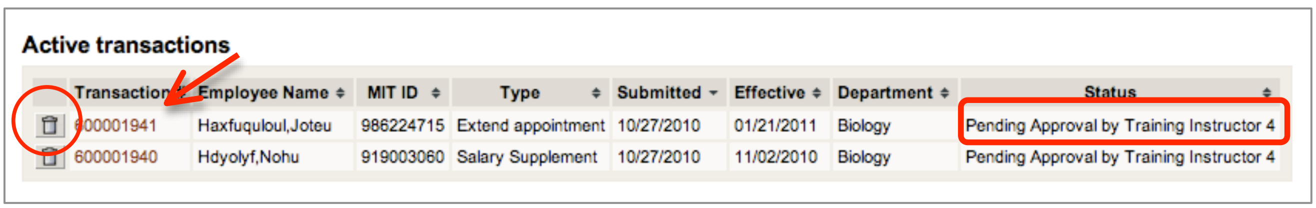
1. Click on the **Employees** Tab.
2. Under the heading HR Transactions > Administer, click the **HR Transaction Inbox** link.

# 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**

| | Transaction # | Employee Name | MIT ID | Type | Submitted | Effective | Department | Status |
|---|---|---|---|---|---|---|---|---|
| | 600001941 | Haxfuquloul,Joteu | 986224715 | Extend appointment | 10/27/2010 | 01/21/2011 | Biology | Pending Approval by Training Instructor 4 |
| | 600001940 | Hdyolyf,Nohu | 919003060 | Salary Supplement | 10/27/2010 | 11/02/2010 | Biology | Pending Approval by Training Instructor 4 |

# 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.

| Transaction # | Employee Name | MIT ID | Type | Submitted | Effective | Department | Status |
|---|---|---|---|---|---|---|---|
| 600000225 | Fultynn,Visl | 941501050 | Supplement | 6/19/09 | 6/19/09 | Biology | Pending Approval |
| 600000216 | Louden,Dick | 941601080 | Supplement | 6/11/09 | 6/25/09 | Chemistry | Rejected |
| 600000215 | Louden,Dick | 941601080 | Supplement | 6/11/09 | 6/5/09 | Chemistry | Pending Processing by Service Center |
| 600000146 | Lytojo,Ynne | 948804060 | Termination | 4/16/09 | 4/17/09 | Biology | Requires Action by Service Center |

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**

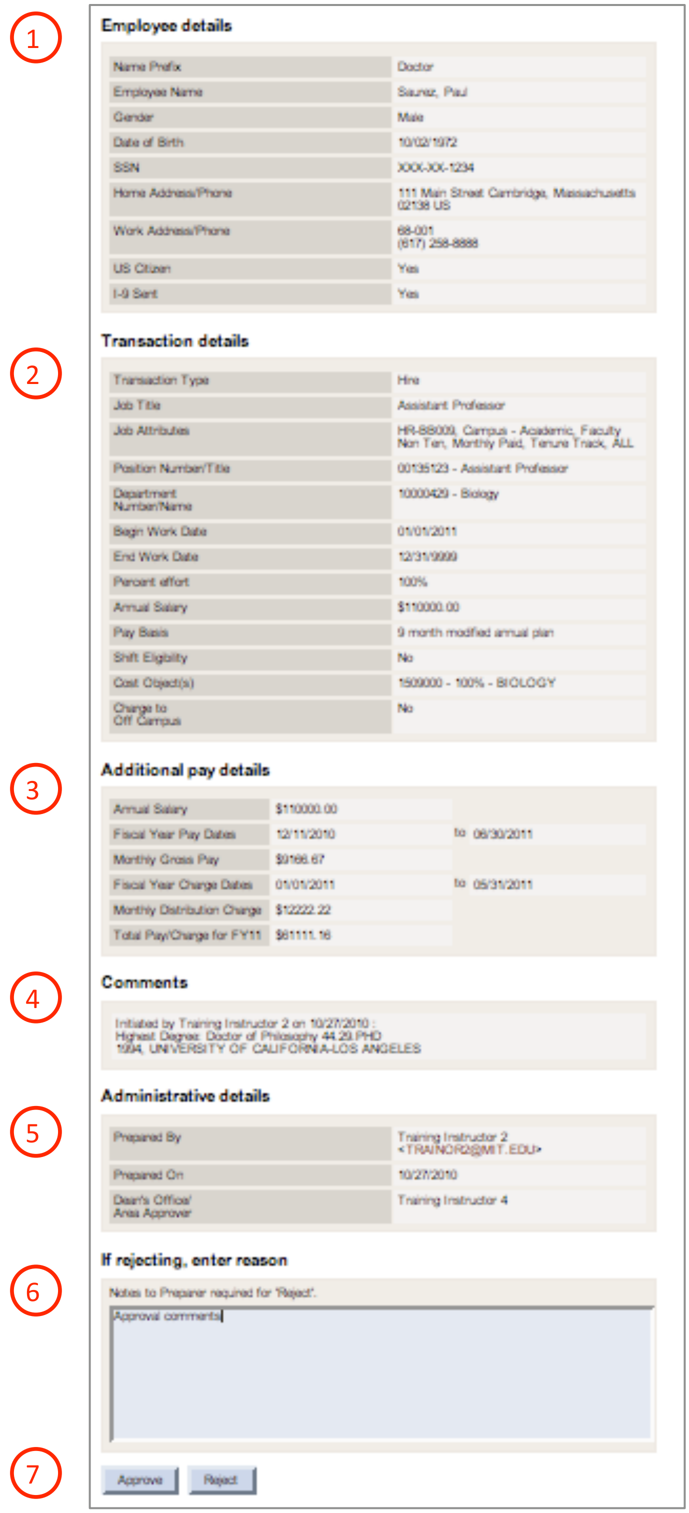
3. Additional Pay Details (**Academic only)**
   - **Fiscal Year charge Dates**
   - **Monthly Gross Pay**
   - **Total Pay/Charge for FY**

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.

**Transaction history**

| Transaction # | Employee Name ▾ | MIT ID ⬍ | Type ⬍ | Submitted ⬍ | Effective ⬍ | Department ⬍ | Status ⬍ |
|---|---|---|---|---|---|---|---|
| 600000493 | Larissa_test2,Srs | 92[redacted]09 | Termination | 3/23/09 | 3/27/09 | Biology | Processed |
| 600000663 | [redacted] | 92[redacted]87 | Termination | 3/31/09 | 3/31/09 | Biology | Processed |

# 2

# View a HR Transaction

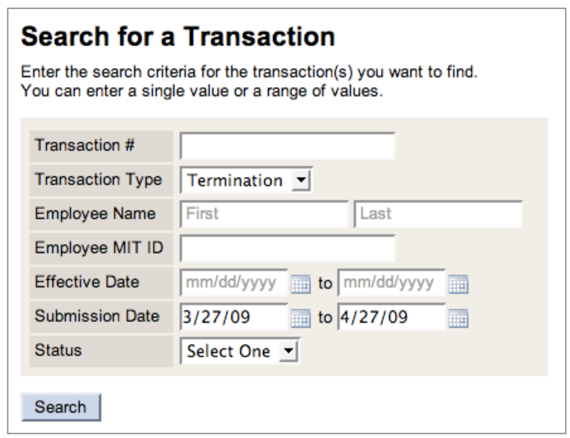
# 2-A : View an HR Transaction

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.

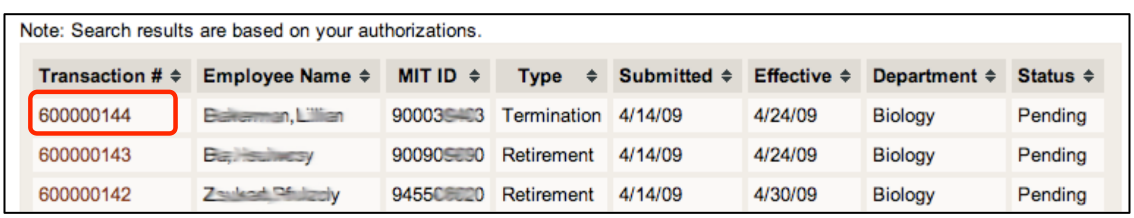
### ▸To View a Transaction:

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.



Note: Search results are based on your authorizations.

| Transaction # | Employee Name | MIT ID | Type | Submitted | Effective | Department | Status |
|---|---|---|---|---|---|---|---|
| 600000144 | [illegible] | 90003[illegible] | Termination | 4/14/09 | 4/24/09 | Biology | Pending |
| 600000143 | [illegible] | 90090[illegible] | Retirement | 4/14/09 | 4/24/09 | Biology | Pending |
| 600000142 | [illegible] | 94550[illegible] | Retirement | 4/14/09 | 4/30/09 | Biology | Pending |