

Monitoring of Tasks – Create and Maintain

Purpose Use this procedure to create or maintain reminder dates for different tasks being created for the employee.

Trigger Perform this procedure when tracking the task dates for an employee.

Prerequisites • Employee is on probation, trial service, in-training, or Leave of Absence, etc.

End User Roles In order to perform this transaction you must be assigned the following role:
Personnel Administration Processor

| Change History | |
|----------------|---|
| Date | Change Description |
| 8/7/2009 | New procedure created. |
| 11/23/2012 | Updated types of Leave in helpful hints. Updated the description of Processing indicator in step 7. |

Menu Path Human Resources → Personnel Management → Administration → HR Master Data → Maintain

Transaction Code PA30

| | |
|----------------------|---|
| Helpful Hints | <ul style="list-style-type: none"> The Monitoring of Task (0019) infotype is part of the New Hire, Re-hire, Appointment Change and Leave of Absence Active/Inactive actions using the transaction code PA40. This infotype follows Contract Elements (0016) only if the Probationary Period field has been completed. Use the Task Monitoring report (S_PH0_48000450) to view the reminder dates created for different task types. See OLQR procedure Task Monitoring. <p> It is important to mark a task complete when it is finished. If this is not done, the task appears in reporting as incomplete.</p> |
|----------------------|---|

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

| Message Type | Description |
|---|--|
| Error  | Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to validate and proceed. |
| Warning  | Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed. |
| Confirmation  or  | Example:  Save your entries. Action: Perform the required action to proceed. |

Procedure

1. Start the transaction using the above menu path or transaction code **PA30**.

The screenshot shows the 'Maintain HR Master Data' window. The 'Personnel no.' field is highlighted with a red box and contains '40000331'. Below it, the 'Monitoring of Tasks' checkbox is checked and also highlighted with a red box. The 'Addtl. Personal Data' tab is selected, and the 'All' radio button is chosen. A red arrow points to the 'Addtl. Personal Data' tab.

2. Complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry | | |
|---|-------|---|
| Field Name | R/O/C | Description |
| Personnel no. | R | The employee's unique identifying number. Example: 40000331 |

3. Click the box to the left of **Monitoring of Tasks** to select.
4. Click **Addtl. Personal Data** to select.

5. Perform one of the following:

| IF | Go To |
|---------------------------------------|-------------|
| You need to create a new task | Steps 6-10 |
| You need to maintain an existing task | Steps 11-18 |

6. Click  (Create) to create a new record.

7. Complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry | | |
|---|-------|---|
| Field Name | R/O/C | Description |
| Task Type | R | A task type is a relevant task that an HRMS user would be expected to perform.  Click  (Dropdown) to view the selection list. Example: 08 Backgrnd Ck Complete |
| Date of Task | R | This is the date on which the task needs to be completed. Example: 07/15/2009 |
| Processing indicator | C | This is used to signify if a task entered in the Monitoring of Tasks infotype is new, in process, or completed. Example: 2 Task completed |

| | | |
|---------------------|---|--|
| Reminder Date | C | This is the date on which the system will remind a user (via report) that a specific period is expiring or a record needs to be updated. Example: 07/08/2009 |
| Lead/follow-up time | C | This is the amount of time to be notified in advance or after an event has occurred.  This option will populate the <i>Reminder Date</i> field when your entries have been validated. Example: 1 Weeks |

8. Click  (Enter) to validate the information.
9. Click  (Save) to save.
10. You have completed this transaction.
11. Click  All to select.
12. Click  (Overview) for an overview of all actions associated with the *Monitoring of Tasks* (0019) infotype.

Infotype Edit Goto Extras System Help

List Monitoring of Tasks (0019)

Personnel No. 40000331 Name CROWLEY RICHELLE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 to 12/31/9999 STy .

Overview

| Task On | Task Type | Task Type Text | Processing indicator | Reminder |
|------------|-----------|----------------------|----------------------|------------|
| 07/15/2009 | 08 | Backgrnd Ck Complete | New task | 07/08/2009 |
| 05/01/2009 | 02 | Trial Service expire | New task | 03/01/2009 |
| 06/16/2007 | 01 | Prob por ts expire | 2 Task completed | 06/01/2007 |

13. Click  05/01/2009 02 Trial Service expire New task 03/01/2009 to select.

14. Click  (Change) to change and continue.

Infotype Edit Goto Extras System Help

Change Monitoring of Tasks (0019)

Personnel No. 40000331 Name CROWLEY RICHELLE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Task

Task Type Trial Service expire

Date of Task 05/01/2009 Processing indicator Task completed

Reminder

Reminder Date 04/17/2009

Lead/follow-up time For specific task type



For this screenshot example, the *Processing indicator* is changed to 'Task completed'.

- Review and complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry | | |
|---|-------|--|
| Field Name | R/O/C | Description |
| Task Type | O | A task type is a relevant task that an HRMS user would be expected to perform. Click (Dropdown) to view the selection list. Example: 02 Trial Service expire |
| Date of Task | O | This is the date on which the task needs to be completed. Example: 05/01/2009 |
| Processing indicator | O | This is used to signify if a task entered in the Monitoring of Tasks infotype is new, and in process. Example: 2 Task completed |
| Reminder Date | O | This is the date on which the system will remind a user (via report) that a specific period is expiring or a record needs to be updated. Example: 03/01/2009 |
| Lead/follow-up time | O | This is the amount of time to be notified in advance or after an event has occurred. This option will populate the <i>Reminder Date</i> field when your entries have been validated. Example: 1 Weeks |

- Click (Enter) to validate the information.
- Click (Save) to save.
- You have completed this transaction and will be taken back to the List Monitoring of Tasks (0019) screen.

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|--|
| Results |
| You have created or maintained the employee's Monitoring of Tasks (0019) infotype. |
| Comments |
| None. |