pennsylvania

USER GUIDE_BOARD ADMINISTRATOR

Contents

Board Administrator SAP Role and Functions

The Board Administrator role can create, delete, and update the Board/Commission. This guide outlines the three Boards/Commissions functions only.

The Board Administrator can also perform all Non-Commonwealth Traveler transactions that are detailed in the User Guide for Boards & Commissions and Travel Exception Non-Comm Travelers posted at www.travel.pa.gov on the travel forms and resource tile.

*For those assigned the **Board Administrator role** (YPC>AGY_NONCOMM_ADMIN_COPA), begin by executing transaction **Y_DC6_NCOMMTRAVEL**.*

Upon executing the transaction, the following screen will appear.

Non Commonwealth Travel Process

Please select the Action to Complete:

Boards/Commissions
- ⦿ New Board/Commission
- ○ Delete Board/Commission
- ○ Update Board/Commission

Non Commonwealth Traveler
- ○ Hire
- ○ Separate
- ○ Update Address
- ○ Update Bank Details
- ○ Update Default Travel Account Coding
- ○ Update Name
- ○ Update Travel Approver Position#
- ○ Update Email ID

✔ OK   ✖ Cancel

Create New Board / Commission

Use this option to create a new Board / Commission and request a Board Organization (Org) number in SAP.

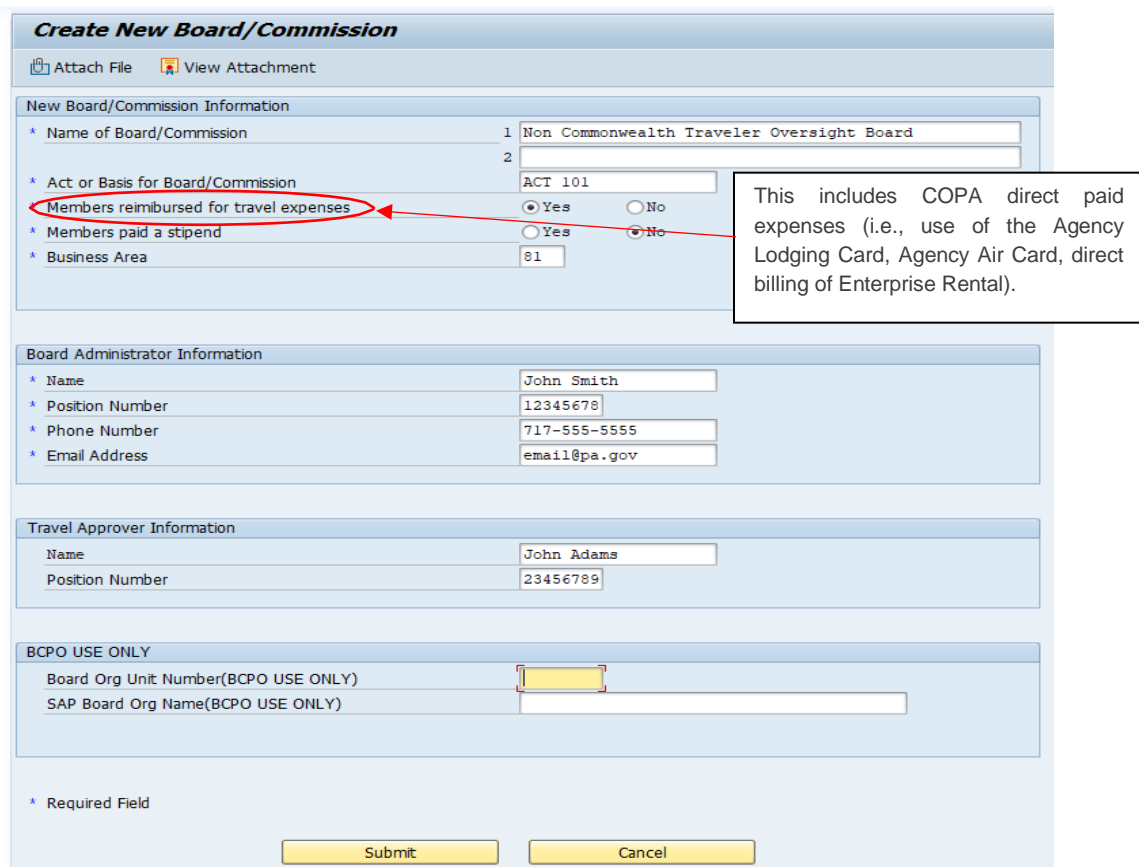1. Select the 'New Board/Commission' radio button and click 'OK' to continue.

Non Commonwealth Travel Process

Please select the Action to Complete:

Boards/Commissions
- ⦿ New Board/Commission
- ◯ Delete Board/Commission
- ◯ Update Board/Commission

2. Complete all required fields.

Create New Board/Commission

Attach File   View Attachment

New Board/Commission Information

* Name of Board/Commission	1	Non Commonwealth Traveler Oversight Board
	2	
* Act or Basis for Board/Commission		ACT 101
Members reimbursed for travel expenses		⦿ Yes ◯ No
* Members paid a stipend		◯ Yes ⦿ No
* Business Area		81

> This includes COPA direct paid expenses (i.e., use of the Agency Lodging Card, Agency Air Card, direct billing of Enterprise Rental).

Board Administrator Information

* Name	John Smith
* Position Number	12345678
* Phone Number	717-555-5555
* Email Address	email@pa.gov

Travel Approver Information

|	
Name	John Adams
Position Number	23456789

BCPO USE ONLY

Board Org Unit Number(BCPO USE ONLY)	
SAP Board Org Name(BCPO USE ONLY)	

* Required Field

Submit   Cancel

3. After completing the form, attach a file with the supporting documentation (copy of ACT, Executive Order, Etc.) authorizing the Board / Commission using the "Attach File" button at the top of the form.

   *Note: Only **one** file can be attached to the form. If there are multiple supporting documents, please scan and combine the documents into a single document.*

   .
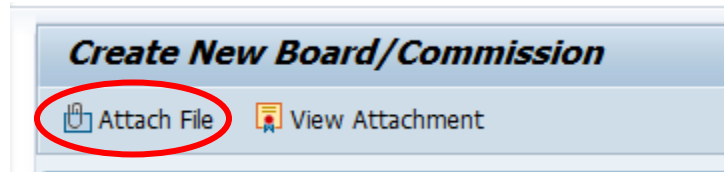
4. Once completed, select the 'Submit' button to send to BCPO for review and action.

If approved, submitter will receive an email notification containing the org number for the board/commission which is needed to hire board/commission members.

Sample email:

> **PLEASE DO NOT REPLY TO THIS EMAIL (it is system generated).**
> **The creation of the following Board/Commission has been reviewed and approved:**
> --
> **Board Org Unit Number: 77880003**
> **Board Org Name: EMAIL APPROVAL BOARD**
> **Please use the hire action to add individuals to Board/Commission.**
> **Please use the Board Org Unit Number 77880003 as the Board Org Unit Number on the hire action.**
> --

If request is rejected by BCPO, the submitter will receive an email notification which will contain the reason for the rejection.

Sample email:

> **PLEASE DO NOT REPLY TO THIS EMAIL (it is system generated).**
> **The creation of the following Board/Commission has been reviewed and rejected:**
> --
> **Board Org Name: EMAIL REJECTED BOARD**
> **Rejection Reason: SAMPLE REJECTION EMAIL**
> --

Delete Board / Commission

Use this option to request a Board/Commission Org number be deleted (delimited) in SAP. This should only be used when the Board/Commission is no longer active and <u>after all Board/Commission members have been separated and all past travel reimbursements are paid</u>.

1. Select the 'Delete Board/Commission' radio button and click 'OK' to continue. Enter the Board Org Number and click 'OK' to continue.

Note: If all the board members have not been separated in the SAP Board Org number, the following message will appear:

2. Enter the date that the board/commission became inactive and select the 'Submit' button to send the request to BCPO for review and action.

An email notification will be sent showing approval or disapproval with reason.

Update Board / Commission

Use this option to request the Board/Commission Org information be updated in SAP.

1. Select the 'Update Board/Commission' radio button and click 'OK' to continue. Enter the Board Org Number and click 'OK' to continue.

2. Input the updates and select the 'Submit' button to send the request to BCPO for review and action.

Update Board/Commission

Update Board/Commission Information

Board Org Unit Number	77000000
SAP Board Org Name(BCPO USE ONLY)	
* Name of Board/Commission	1 BOARD OF ADMISSIONS
	2
* Act or Basis for Board/Commission	ACT OF 2018
* Members reimbursed for travel Expenses	◉ Yes ○ No
* Members paid a stipend	○ Yes ◉ No

Board Administrator Information

* Name	JOE SMITH
* Position Number	50538925
* Phone Number	717-555-5555
* Email Address	EMAIL@PA.GOV

Travel Approver Information

Name	JACK STONE
Position Number	50538927

* Required Field

[Submit]   [Cancel]

An email notification will be sent showing approval or disapproval with reason.

Identify and Monitor Board/Commission Members or Non-Comm Travelers

There are multiple ways to track and identify Board/Commission Members and Non-Comm Travelers:

Agency Organization Chart

If you have access to the Agency Organization Chart, you may use it to view current Board/Commission Members and Non-Comm Travelers. All Board/Commission Members' and Non-Comm Travelers' names and SAP Employee Numbers will appear on the organization chart under the person designated in SAP as the 'Travel Approver'.

For Board/Commission Members, the chart should also provide the name of the Board and the Board Org Unit No. (which you will need when submitting a hire, separate, or update transaction in SAP for a Board/Commission Member).

The old BCPO Board Numbers (ex: 081-1111) are no longer being used, and the new Board Org Unit No. replaces it. All Board Org Unit Numbers begin with 77 (ex: 77XXXXXX) and are unique to each Board.
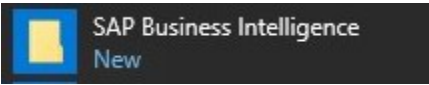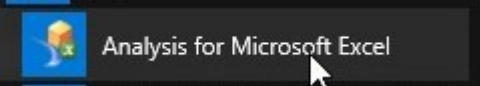
Each Agency has only one 'default' Org Unit Number for all Travel Exception Non-Comms within that Agency (see below listing):

BUSINESS AREA	DEFAULT ORG NUMBER	BUSINESS AREA	DEFAULT ORG NUMBER
10	77100000	32	77320000
11	77110000	33	77330000
12	77120000	35	77350000
13	77130000	37	77370000
15	77150000	38	77380000
16	77160000	40	77400000
17	77170000	65	77650000
18	77180000	67	77670000
19	77190000	68	77680000
20	77200000	70	77700000
21	77210000	71	77710000
22	77220000	72	77720000
23	77230000	74	77740000
24	77240000	75	77750000
25	77250000	78	77780000
26	77260000	79	77790000
27	77270000	81	77810000
28	77280000	88	77880000
30	77300000	99	77990000
31	77310000		

## Travel Complement – Non-Commonwealth SAP Analysis for Office (AO) Report

This report may be used to review and maintain your Board/Commission Members or Non-Comm Travelers.

Your position must have the 'YMW>FI_TVE' SAP Role to run this Travel Report. *If you do not currently have this SAP Role, contact your Agency HR Office and request the role be added to your position.*

1. To login, click Start (button). .

2. Scroll and select SAP Business Intelligence folder. .

3. Select Analysis for Microsoft Excel (list item). .

An Excel spreadsheet (Book 1) will open.

4. Select the File Tab (button).

5. Select Analysis (list item).

6. Select Open Workbook (menu item) and select Open a workbook from the SAP Business Warehouse Platform (menu item). Note: you may need to click on Connections (tree item) and COPA (tree item) the first time before you have the option to select Business Warehouse reports.

7. Select Business Warehouse Reports and click Next.
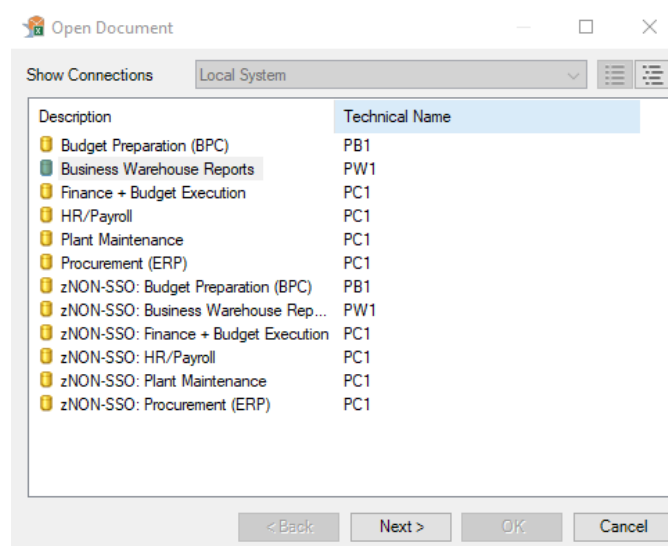
8. Enter 110 as the client and ENG as the language and click ok. This screen only comes up the first time you log on.
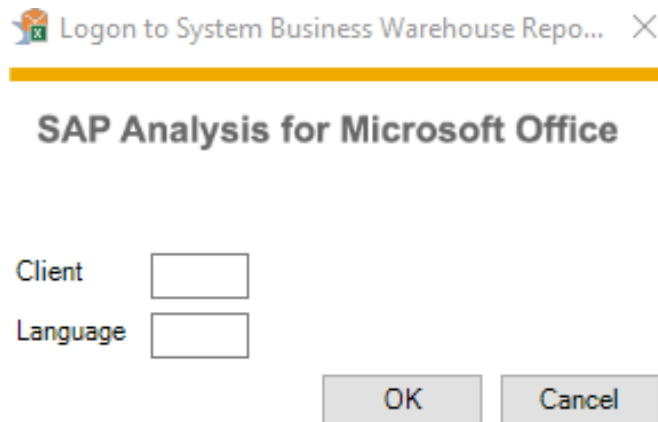
9. On the Role tab, click on the + next to the Travel Expenses folder to expand.

10. Select Travel Complement – Non-Comm and click ok to open the variant prompts box.
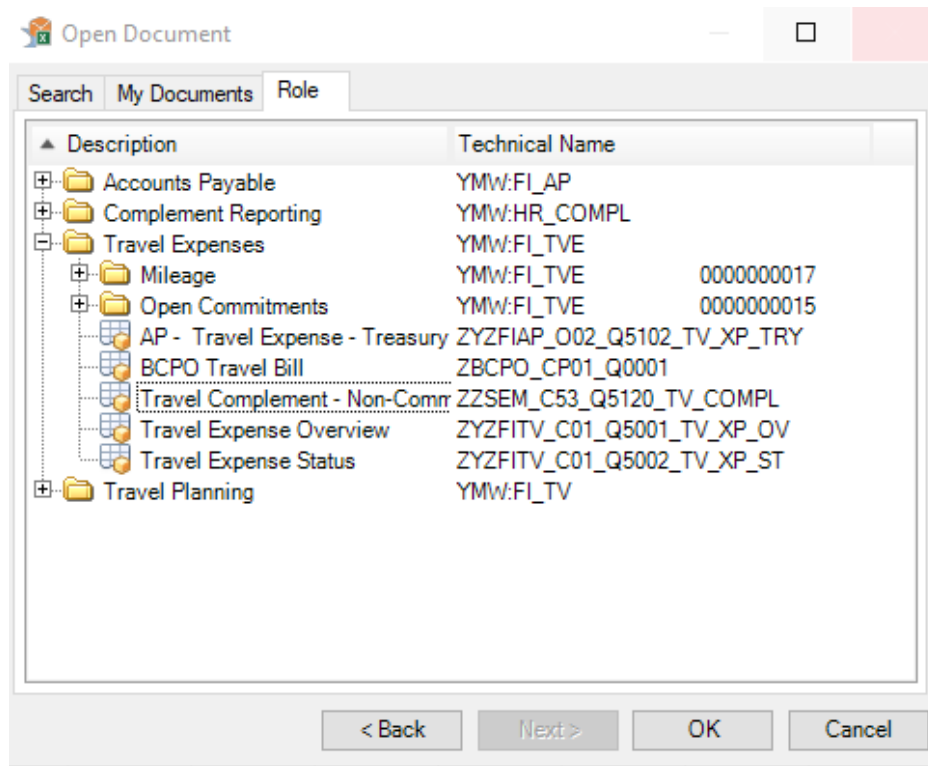
11. The Calendar Month / Year is a required field.

12. A Monday date must be used if you enter a date in the calendar date (Information refreshes on Mondays).

13. Enter the Personnel Area to bring up ALL Non-Commonwealth Org Units within the Personnel Area.

14. If you want to see a specific Non-Commonwealth Org Unit – enter the Org Unit No. and only that Org Unit will appear on the report.

15. Click OK. Report will open.

Personnel area		Organizational Unit		Position	Pos Fil, Vac, New	Employee		Job		Calendar day	04/13/2020
											Full-time Equivalent
35	Environmental Protection	77350000	EP Non Comm Traveler	50590572	F	764027	MARTEN EDWARDS	3025703	Non Cmwl Travlr/Bd Mbr		1.00
				50591011	F	417949	Thomas Simmons	3025703	Non Cmwl Travlr/Bd Mbr		1.00
		77350001	EP Climate Chng Adv Cmte	50563000	F	751185	LINDSAY A BAXTER	3025703	Non Cmwl Travlr/Bd Mbr		1.00
				50589554	F	481640	Luke Floyd Brubaker	3025703	Non Cmwl Travlr/Bd Mbr		1.00
		77350002	Ctzns Advry Cncl	50577120	F	482639	DONALD WELSH	3002701	Mbr Bd Comm		1.00
				50577121	F	602243	THADDEUS K STEVENS	3002701	Mbr Bd Comm		1.00
				50577325	F	612481	TERRY L DAYTON	3002701	Mbr Bd Comm		1.00
				50577327	F	625563	JOHN J WALLISER	3002701	Mbr Bd Comm		1.00
				50577331	F	195775	WALTER N. HEINE	3002701	Mbr Bd Comm		1.00
				50577334	F	695859	WILLIAM C. FINK	3002701	Mbr Bd Comm		1.00
				50577335	F	717426	MARK D. CASKEY	3002701	Mbr Bd Comm		1.00
				50577336	F	732055	JAMES SANDOE	3002701	Mbr Bd Comm		1.00
				50577337	F	742925	JOHN J ST. CLAIR	3002701	Mbr Bd Comm		1.00
				50577338	F	744594	JEROME SHABAZZ	3002701	Mbr Bd Comm		1.00
				50577339	F	744595	JAMES SCHMID	3002701	Mbr Bd Comm		1.00
				50577340	F	745945	DUANE E MOWERY	3002701	Mbr Bd Comm		1.00
				50577342	F	602854	CYNTHIA CARROW	3002701	Mbr Bd Comm		1.00
				50577356	F	100380	JOHN R OVER Jr	3002701	Mbr Bd Comm		1.00
		77350003	EP Wtr Res Advry Cmte	50570746	F	754962	JENIFER D CHRISTMAN	3025703	Non Cmwl Travlr/Bd Mbr		1.00
				50577326	F	612905	ROBERT TRAVER	3002701	Mbr Bd Comm		1.00
				50577328	F	637477	JOHN K JACKSON	3002701	Mbr Bd Comm		1.00
				50577333	F	684269	EMIL Charles WUNZ	3002701	Mbr Bd Comm		1.00
				50577341	F	414038	SHERENE HESS	3002701	Mbr Bd Comm		1.00
				50593099	F	765301	MATTHEW GENCHUR	3025703	Non Cmwl Travlr/Bd Mbr		1.00
		77350004	Lw Lvl Wste Advry Cmte	50575473	F	756592	YUANGING GUO	3025703	Non Cmwl Travlr/Bd Mbr		1.00
				50575525	F	756593	JESSE R SLOANE	3025703	Non Cmwl Travlr/Bd Mbr		1.00
				50577332	F	215894	HARRY GARMAN	3002701	Mbr Bd Comm		1.00
				50577343	F	602916	KATHERINE M SHELLY	3002701	Mbr Bd Comm		1.00
				50577344	F	602935	CHARLOTTE GLAUSER	3002701	Mbr Bd Comm		1.00
				50577351	F	651737	JO Ellen LITZ	3002701	Mbr Bd Comm		1.00
				50577354	F	715976	CAROLE RUBLEY	3002701	Mbr Bd Comm		1.00
		77350005	EP St Bd Cert Wtr Wstewtr Sys Oprs	50577615	F	443943	MARK Allan SMITH	3025703	Non Cmwl Travlr/Bd Mbr		1.00
				50577619	F	651243	RONALD D. NEUFELD	3002701	Mbr Bd Comm		1.00
				50577655	F	757396	Mary Roland	3002701	Mbr Bd Comm		1.00
		77350006	EP Mng Rclm Advry Bd	50577601	F	289271	DARREL K. LEWIS	3025703	Non Cmwl Travlr/Bd Mbr		1.00

16. All Org Unit Numbers begin with 77XXXXXXX.

17. The Org Unit No. on the report ending in 0 is the Agency's 'Default' Non-Comm Org Unit. Non-Comms that are traveling more than one time and receiving reimbursement per an approved Travel Exception (i.e., not members of a Board) should appear under this Default Org Unit.

18. The remaining Org Unit Numbers ending in a number other than 0 represent the Org Unit Numbers established for each Board within the Agency who are reimbursed for travel expenses.

19. This report should be used to review and maintain your Agency's Board/Non-Comms. Travelers who serve on multiple boards will have a different Employee No. for each board.

20. If your report does not reflect Board/Non-Comms active in your Agency or if the listing reflects Board/Non-Comm Travelers no longer active, please Hire or Separate as needed. Please refer to the *User Guide for Boards & Commissions and Travel Exception Non-Comm Travelers* posted at www.travel.pa.gov on the training tile for instructions.

Contact

Please send questions or requests for assistance to the OB, BCPO Board and Commissions Resource Account at ra-obbcpoboard@pa.gov.

.