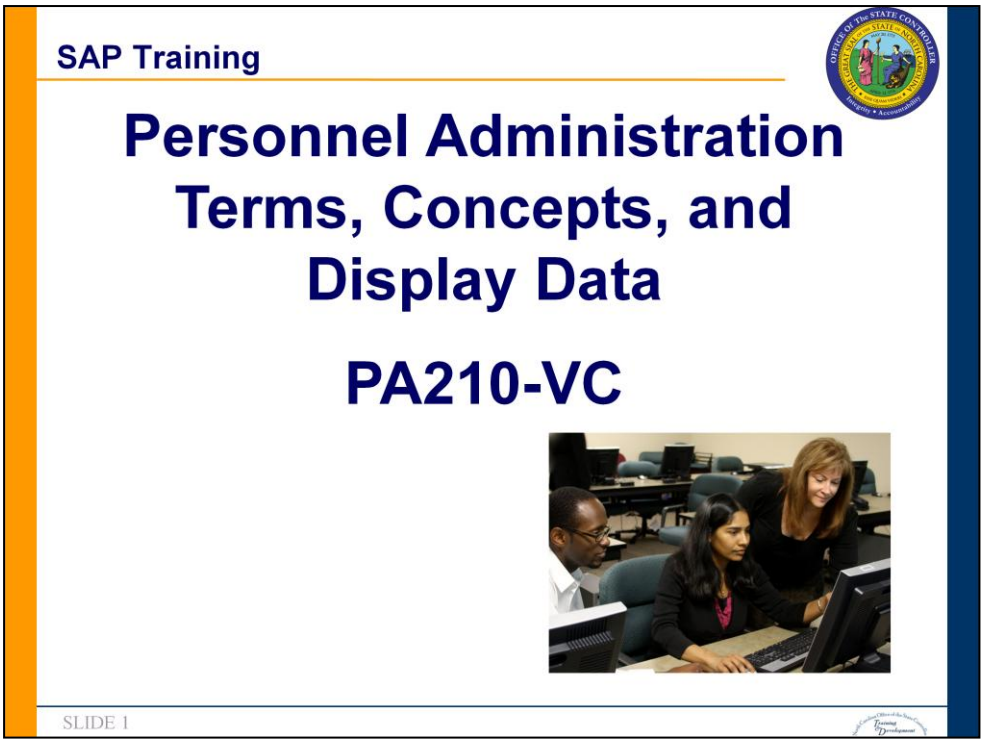


Notes:

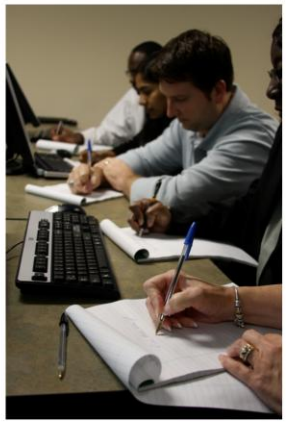
Welcome to *PA210 - Terms, Concepts, and Display Data* virtual classroom training course.

This virtual class is taught in two sessions: A and B. Based on the pace of the class, the instructor will determine a logical place to conclude session A (which may or may not be at the end of a lesson).

Welcome and Introductions

Welcome to the *Terms, Concepts and Display Data* course.

- Introductions
- Breaks
- Parking Lot
- Virtual Classroom etiquette
  - Mute telephone
  - Cell phone off



SLIDE 2

Notes:

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. There will be at least one break during this session.

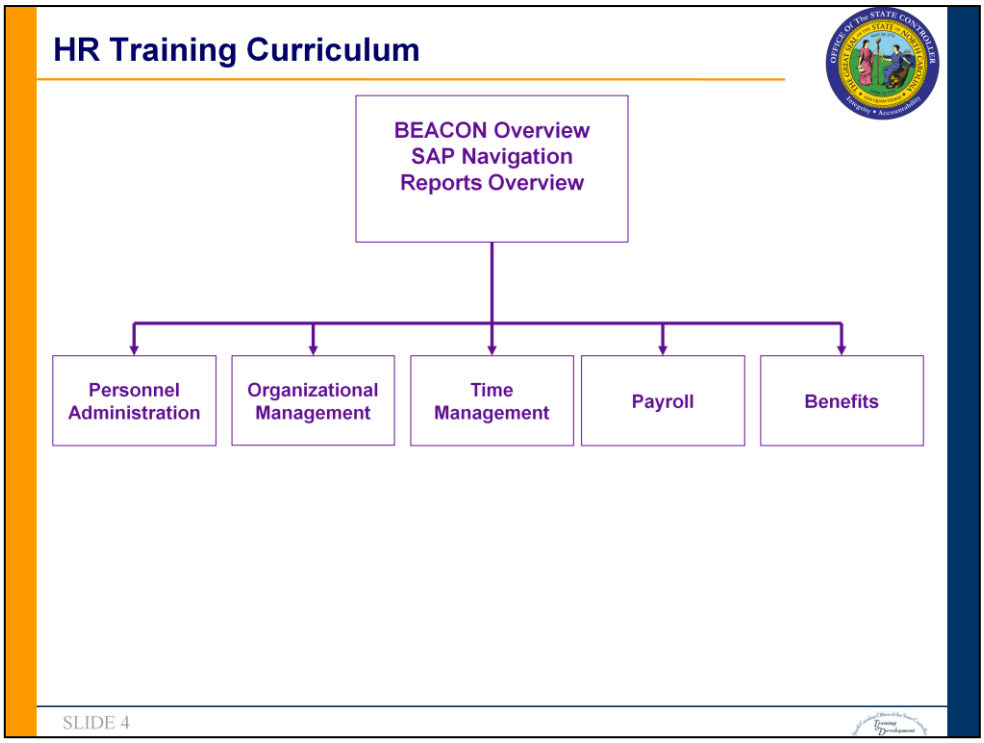
Pre-requisites

- BEACON Overview BC100
- SAP Basic Navigation BC110
- Personnel Administration Overview PA200
- VC101 – Virtual Classroom Navigation

SLIDE 3

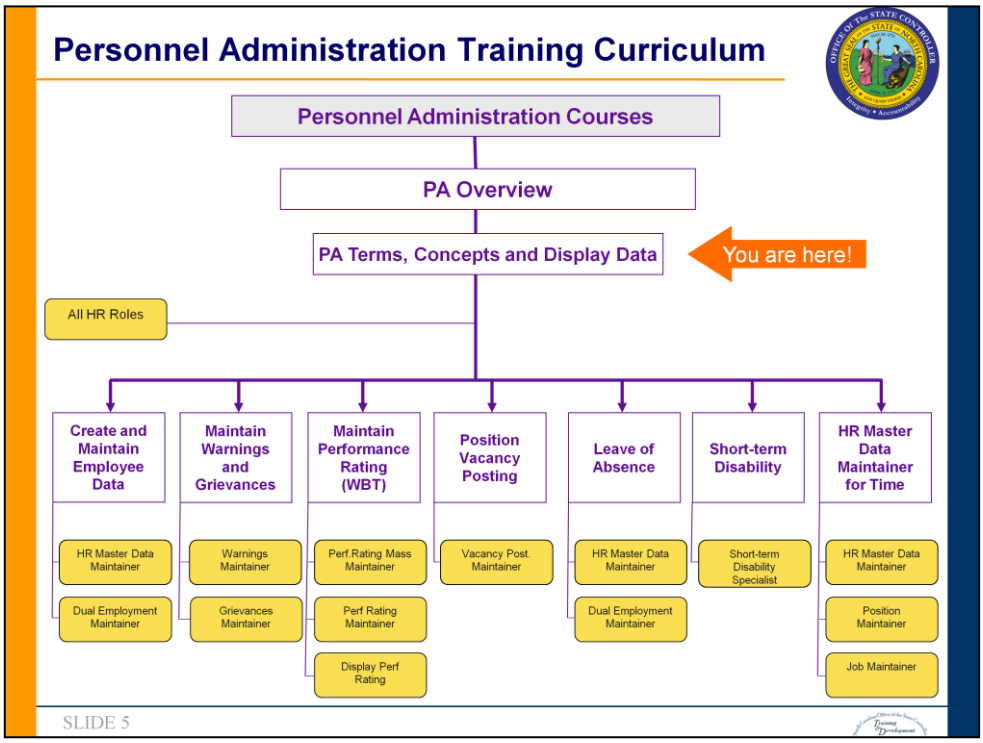
Notes:

There are four pre-requisites that you must take before attending this class. Attending these pre-requisites ensures that you are adequately prepared to learn the new processes, concepts, terms and data entry skills that are covered in this course.



Notes:

The OSC HR/ Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the Personnel Administration module.



Notes:

Within the Personnel Administration module, there are several courses. Everyone attends this first course, *Personnel Administration Overview*. Your position determines which additional courses you may be required to attend.

Course Map – PA Overview

- Lesson 1: Terms and Definitions
- Lesson 2: Display Employee Data
- Lesson 3: Course Review

SLIDE 6

Notes:

All of the job aids and simulations that are used in this class are available on BEACON University. For the most up-to-date versions, you should always use the materials on the BEACON University website.

Course Objectives

Upon completion of this course, you should be able to:

- Define key terms and processes
- Display information in an employee's SAP personnel record
- Distinguish between the display transaction codes

SLIDE 7

Notes:

This course is designed to provide you with general knowledge about Personnel Administration and how to display data.

Course Map – PA Overview

Lesson 1: Terms and Definitions

Lesson 2: Display Employee Data

Lesson 3: Course Review

SLIDE 8

Notes:

Lesson Objectives

After completing this lesson, you should be able to:

- Identify and define basic SAP Personnel Administration terms
- Explain the importance of dates in SAP HR
- Identify reasons associated with Actions

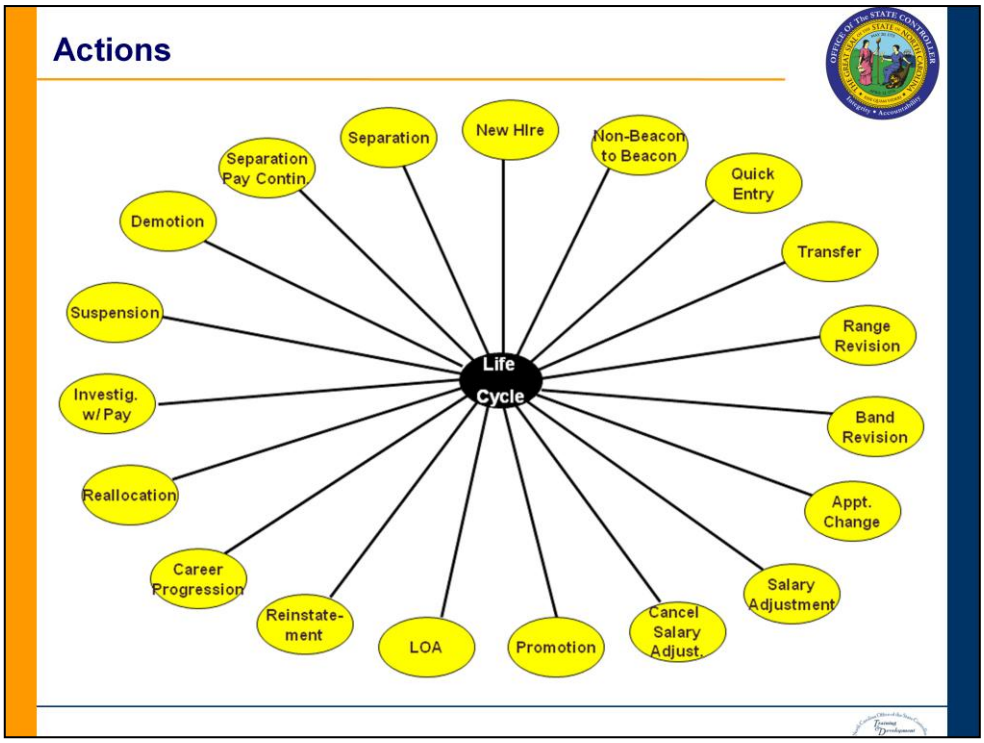
SLIDE 9

Notes:

In order to communicate effectively, it is important that everyone has the same understanding of new terms and concepts in the OSC HR/Payroll environment.

This lesson provides terms that will become familiar to you. Each term is explained in detail in the next pages.

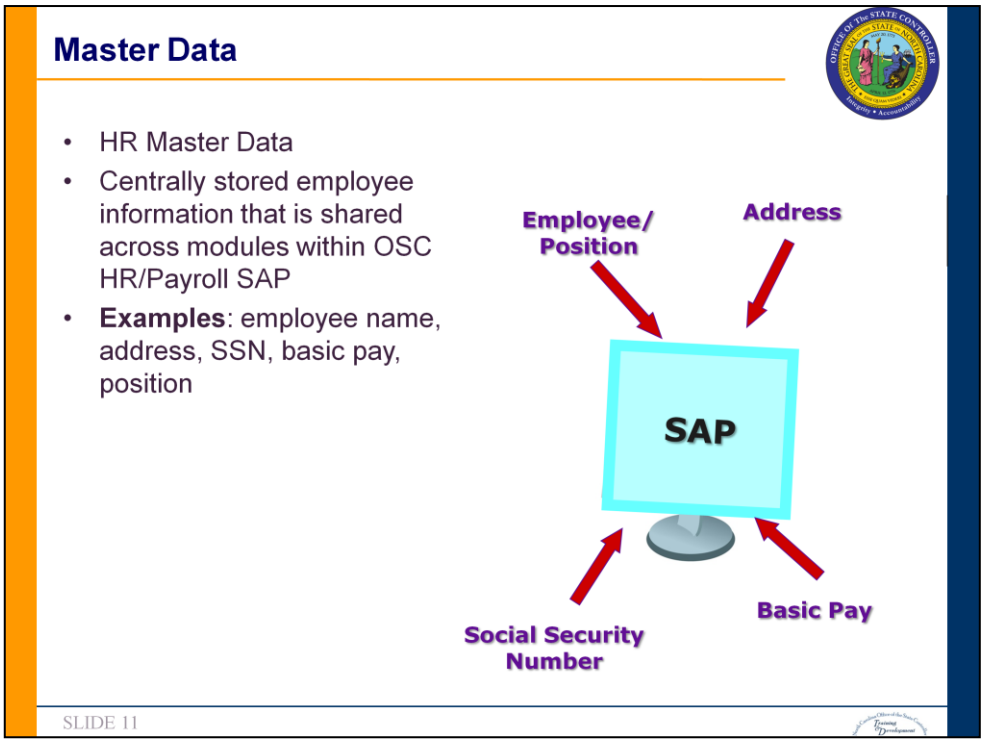
PA 310 – Create and Maintain Employee Data



Notes:

As discussed in the *PA Terms, Concepts and Display Data* course, the life cycle of an employee comprises many different events. BEACON SAP defines those events as a specific infotype called **Actions** (0000). Actions for the State of North Carolina are shown above.

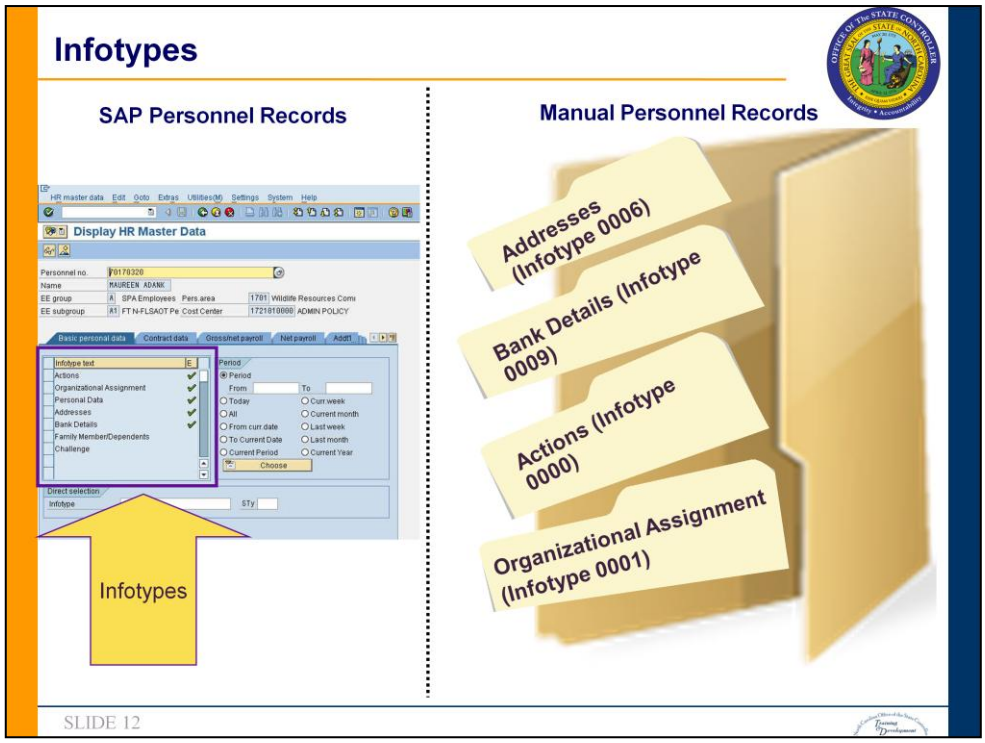
An Action combines logically related infotypes into one infogroup. The infotypes in the infogroup are sequentially arranged and automatically display. This helps to simplify the data entry for the Action. You don't have to remember whether a particular infotype should be included—BEACON SAP automatically includes the infotypes that are associated with a particular Action. Depending upon the employee's specific data, you may not need to enter data on each of the infotypes presented in the Action.



Notes:

OSC HR/Payroll SAP stores employee data, called **Master Data**, in a central database that can be shared across all modules. Master Data contains the employee's personal, position, and organizational related information and includes all of the data required for processing benefits, time, and payroll. Master Data represents individual entries such as employee name, address, and basic pay.

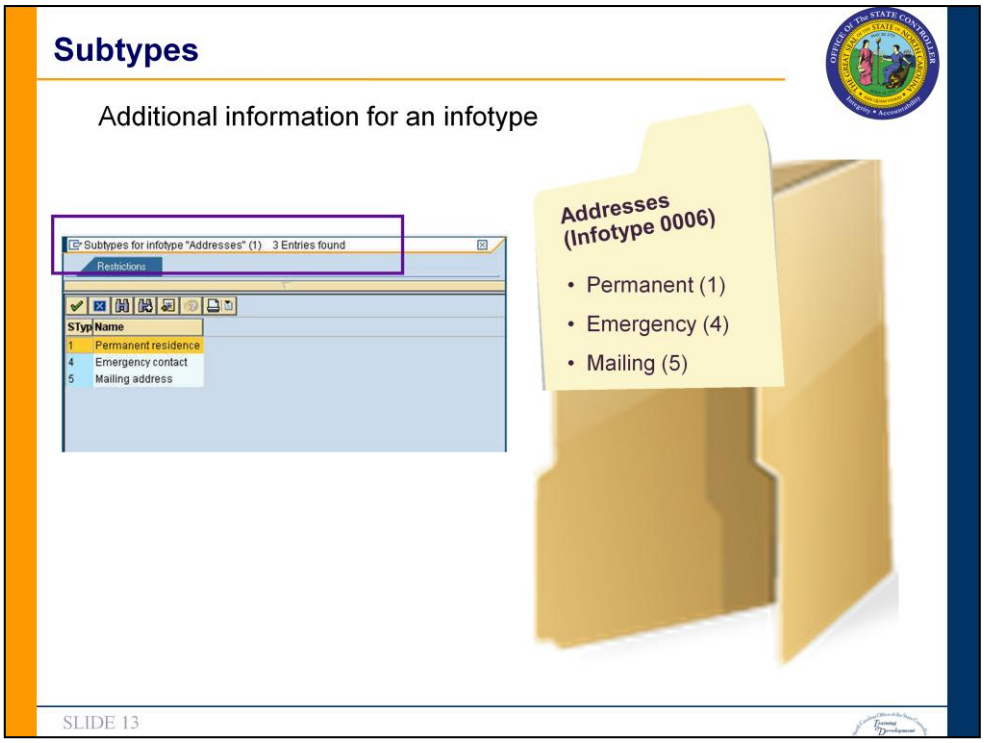
Generally, Master Data is information that remains the same over a long period of time. Since OSC HR/Payroll SAP is integrated with other modules, those modules can use HR Master Data as applicable. This eliminates duplicate data entry. Likewise, HR can use Master Data associated with other modules.



Notes:

Employee master data is organized into **infotypes**. Infotypes are used to group related data fields together to form units of information in the HR module. Infotype is the term SAP uses to identify the screens that make up an employee's personnel file. Just as you would have individual pieces of paper in a file folder to comprise a manual personnel record, you will now have electronic infotypes to comprise a personnel record. Just think of an infotype as a screen of information.

Infotypes form the basis of the actions and sequencing that allow for easier and faster data entry and updates.



Notes:

A **subtype** is an expansion of an infotype to hold additional screens of information. For example, the State of North Carolina will record not only an employee's permanent address, but the mailing address and emergency contact information as well. Therefore, the Addresses infotype (0006), contains subtypes (1, 4, 5) for those additional addresses. Only a few infotypes require subtypes.

Dates are Critical in OSC HR/Payroll SAP

- Every entry must have a beginning (effective) date
- OSC HR/Payroll SAP automatically assigns an end date
- Infotypes can be manually assigned an end date

SLIDE 14

Notes:

Every HR Action and infotype must have a beginning (effective) and ending date. When records are created or revised you are required to enter an effective (beginning) date. The OSC HR/Payroll SAP effective date default is the current date. Therefore, when you are entering data you must be especially diligent about entering the correct effective date.

OSC HR/Payroll SAP automatically assigns an end date of 12/31/9999 to the new or revised data. In addition, OSC HR/Payroll SAP assigns an end date to the previous data (if applicable) for an Action or infotype. An end date can also be manually entered by data entry personnel.

Validity Periods

Start and end dates that define the life span of an infotype

Start date End date

Start date End date

SLIDE 15

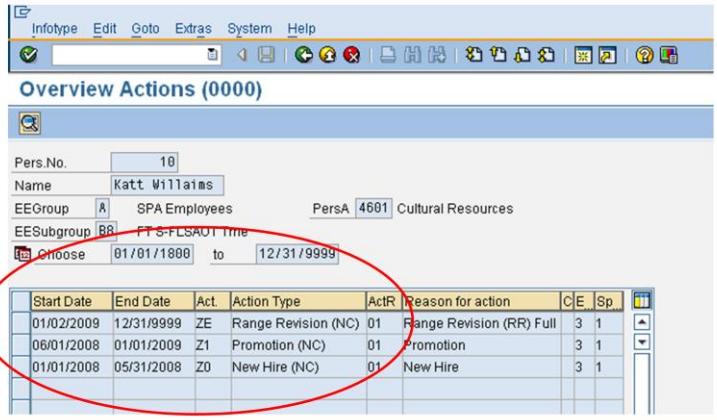
Notes:

When a record is created, it must have a beginning or start date and an ending date, which is called the **validity period**. Although the data entry personnel will always know the start date of a record, he or she often will not know the end date. For example, if an employee is hired or promoted today, the end date for either of those records is unknown. To accommodate for that uncertainty, SAP allocates an end date of December 31, 9999 (sometimes referred to as the end of time) for all current records. When that current record ends, SAP applies the appropriate end date.

When an infotype in an employee's SAP personnel record is revised, the old record is not lost or overwritten (unless it is a correction entry), it just ceases to be the most current record. The old record remains in the system as part of the employee's history. Historical records will have actual start and end dates; the current record's end date is 12/31/9999. In case of a correction entry, the incorrect data is overwritten because you obviously don't need a historical record of the incorrect data.

Delimit

- Application of an end date to a previous record
- History is created
- End date becomes the day before the effective date of the newly created record



SLIDE 16

Notes:

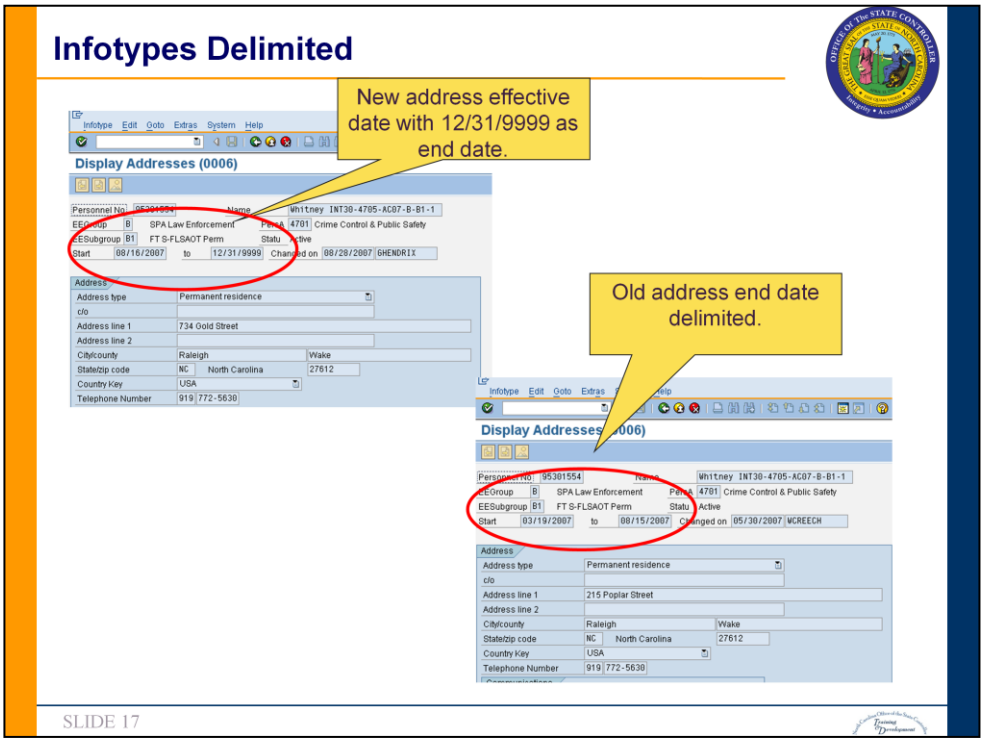
Delimit means to put an end date on a previous record. When the new record for an infotype is created, OSC HR/Payroll SAP automatically delimits the previous record to one day prior to the new record's effective date. This preserves history. Any record with an end date other than 12/31/9999 has been delimited.

In the example illustrated above the employee's original Action was the New Hire. When it was entered, it had an end date of 12/31/9999.

On 6/1/2008, an entry was made to promote the employee. When the effective date of 6/1/2008 was entered, SAP automatically delimited the new hire record to 5/31/2008 and applied 12/31/9999 to the promotion.

In a similar manner, when a range revision was entered 1/2/2009, SAP delimited the promotion one day prior and made the range revision the most current record.

OSC HR/Payroll SAP is date-driven so it is essential to understand the concept of validity periods and how OSC HR/Payroll SAP preserves history.



Notes:

The preceding example was for the Actions (New Hire, Promotion) infotype. However, the same concept is true for individual infotypes as well.

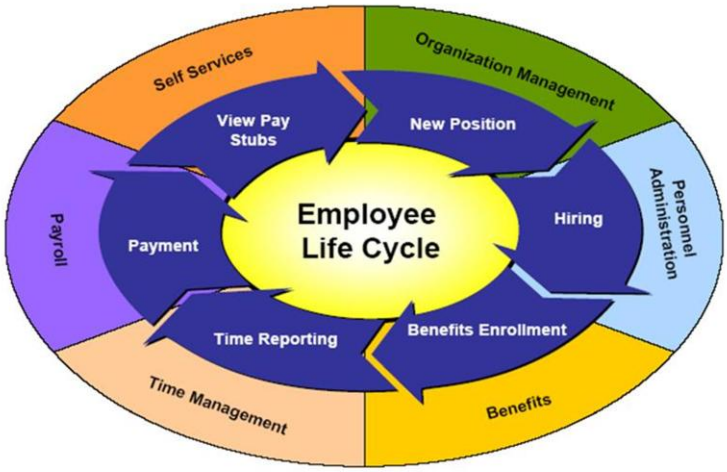
In the above example, the employee moved to a new permanent address effective 8/16/2007. When the new permanent address was entered with the 8/16/2007 effective date, SAP automatically assigned the end date as 12/31/9999 and delimited the old permanent address as of 8/15/2007.

The employee's other addresses, emergency contact and mailing address, still have their original end dates of 12/31/9999 because no changes have been made to them. In this case, the Addresses infotype has several subtypes, all with ending dates of 12/31/9999.

NOTE: Emergency addresses must be manually delimited because SAP assumes that an employee can have more than one emergency contact. Therefore, when a new emergency infotype is added, SAP does not automatically delimit the former emergency record.

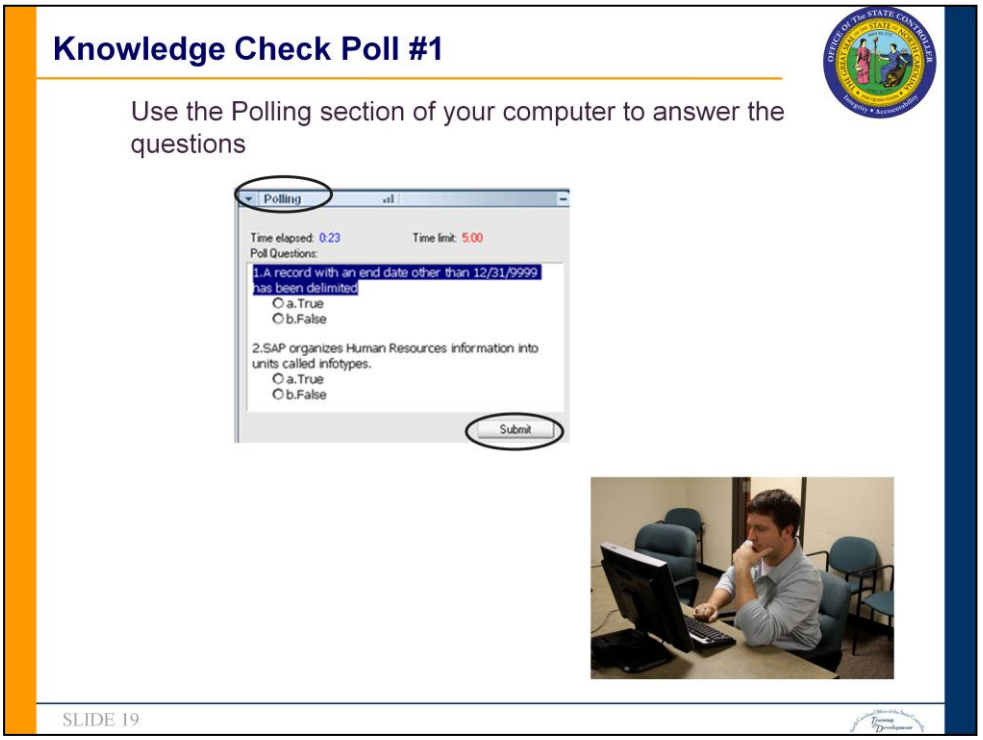
OSC HR/Payroll SAP Integration

Because OSC HR/Payroll SAP is an integrated system, many entries made in Personnel Administration affect some component of an employee's time, benefits and pay.



SLIDE 18

Notes:



Notes:

1. A record with an end date other than 12/31/9999 has been delimited.

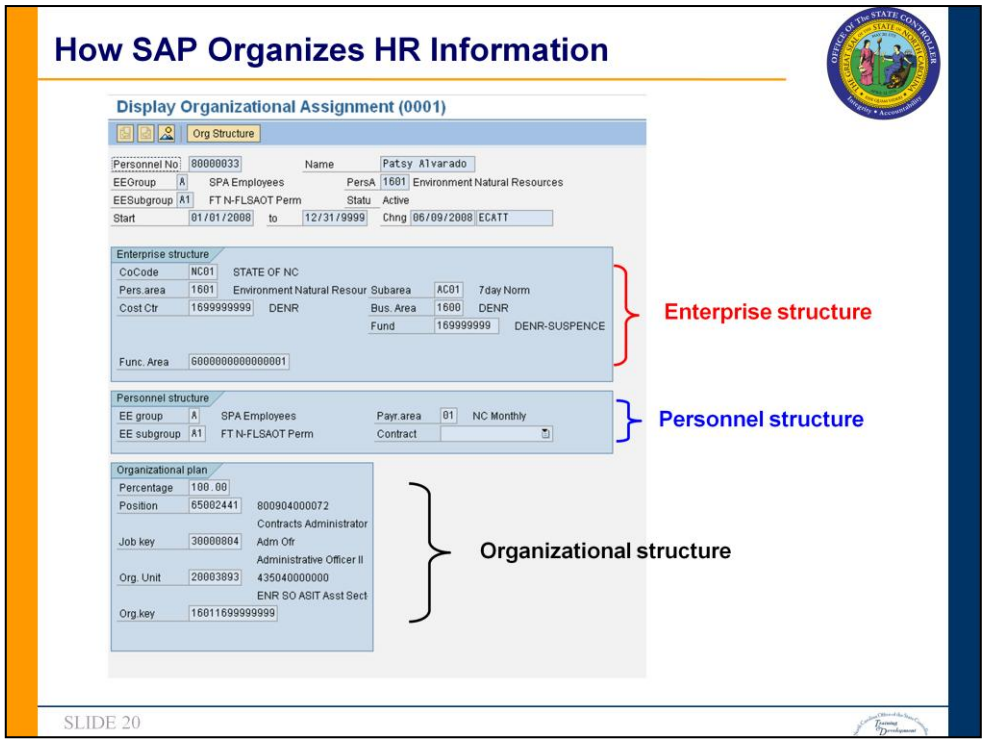
   - a. True
   - b. False

2. OSC HR/Payroll SAP organizes Human Resources information into units called infotypes and some have subtypes.

   - a. True
   - b. False

3. Information entered in Personnel Administration affects an employee's time, benefits and payroll.

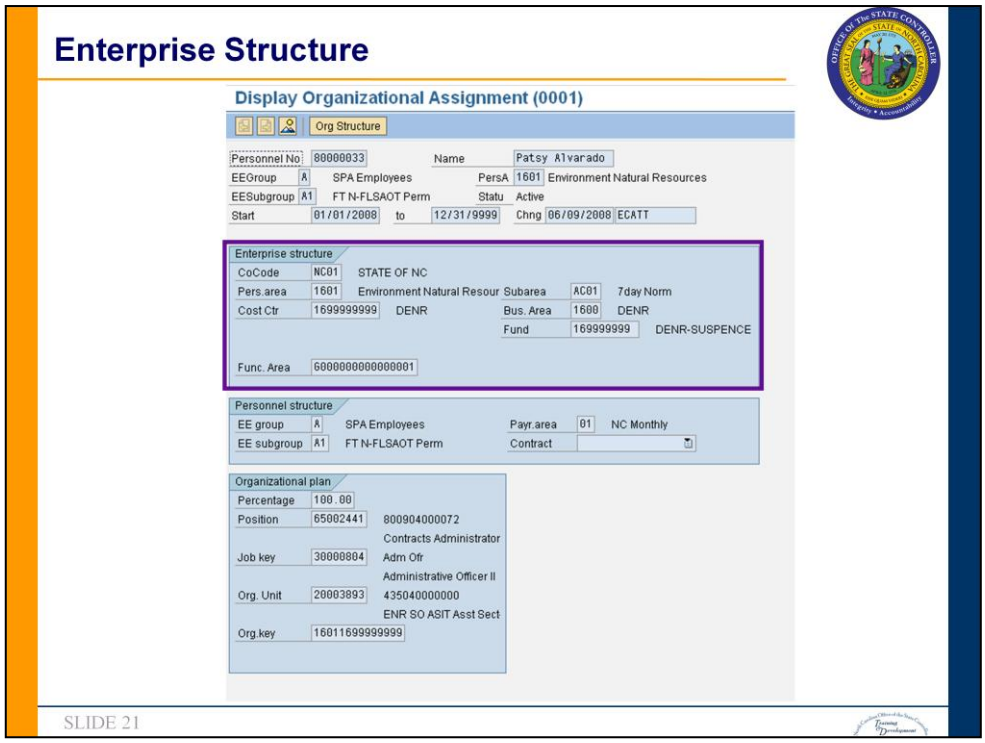
   - a. True
   - b. False



Notes:

SAP uses the following areas to organize organizational and employee information:

- Enterprise Structure
- Personnel Areas
- Organizational Structure



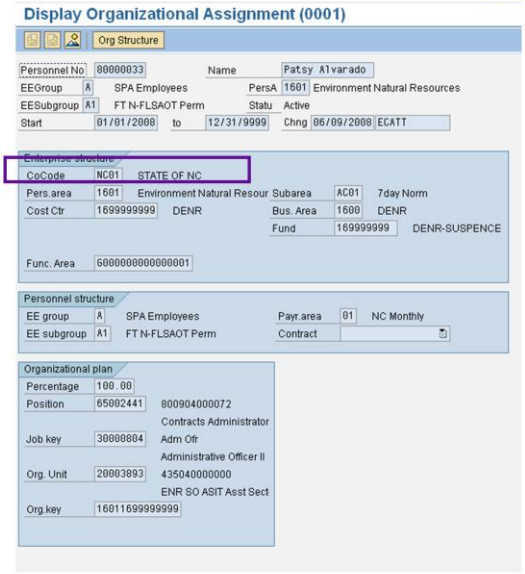
Notes:

The Enterprise structure defines the legal and financial (fiscal) structure of the State of North Carolina and is comprised of:

- Company Code
- Personnel Areas
- Personnel Sub-Areas
- Cost Center
- Functional Area
- Fund
- Business Area

Company Code

- The company code allows for independent accounting.
- Multiple company codes can exist.



SLIDE 22

Notes:

A **Company Code** is an HR integration point with SAP financial accounting applications and is an integral part of an employee's HR record through the connection with Personnel Administration. The Company Code represents the highest levels of the organizational structure. The State of North Carolina uses two company codes: NC01 and NC02. All agencies, except Transportation and Employment Security Commission, use NC01.

NC01 – State of North Carolina - NCAS

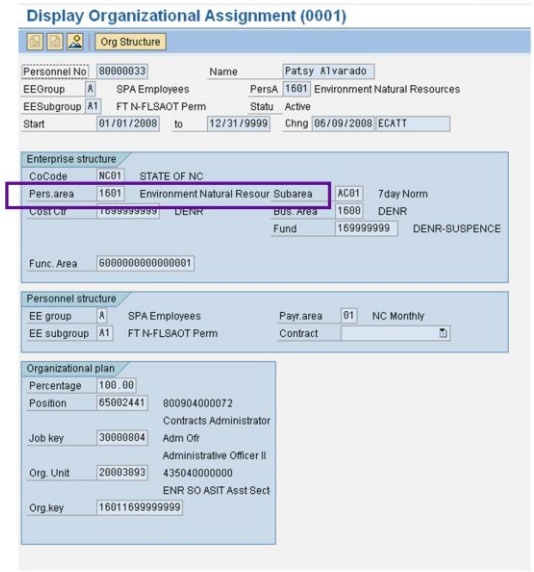
NC01 represents primary government agencies and component units which use NCAS (North Carolina Accounting System) as their main accounting system. Until NCAS is replaced, payroll financial postings from company code NC01 will be interfaced to NCAS.

NC02 – State of North Carolina - Others

NC02 represents any primary government agency or component unit that does *not* use NCAS as its primary accounting system but is included in the HR/Payroll project for processing payroll transactions. These agencies or component units have their own accounting system and chart of accounts, and require payroll entries to be interfaced to their accounting systems.

Personnel Area

- Designates specific agency for Payroll
- Related to Company Code
- Assigned at the position level and defaults to the employee's record



SLIDE 23

Notes:

The **Personnel Area** is tied directly to the company code and is used by Payroll to identify the specific agency for whom the employee works. A company code can include one or more Personnel Areas. Personnel Area is important for selecting dates for reporting. Personnel areas determine where wages and salaries are posted and from where they are paid. Some examples are:

Company Code NC01

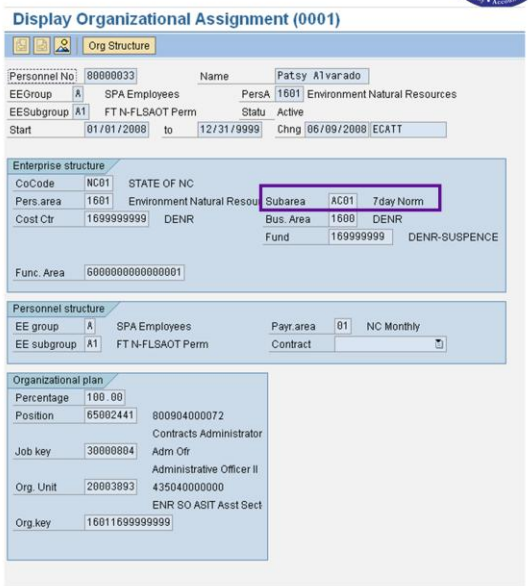
- 1401 State Controller
- 1601 Environmental and Natural Sciences
- Z101 State Personnel
- 8701 School of Science and Math

Company Code NC02

- 1501 Transportation
- 4401 Employment Security Commission

Personnel Subarea

- Assigned at the position level and defaults to the employee's record
- Defines Time Management rules



SLIDE 24

Notes:

The **Personnel Subarea (PSA)** further defines the Personnel Area. PSA has been designed to identify various working schedules so that Time Management can define groups of specific time entry rules (for example, 7-day schedule; 24/7 etc.). PSA groups similar jobs to conform to time and attendance rules. There are five key elements that determine an employee's Personnel Subarea assignment:

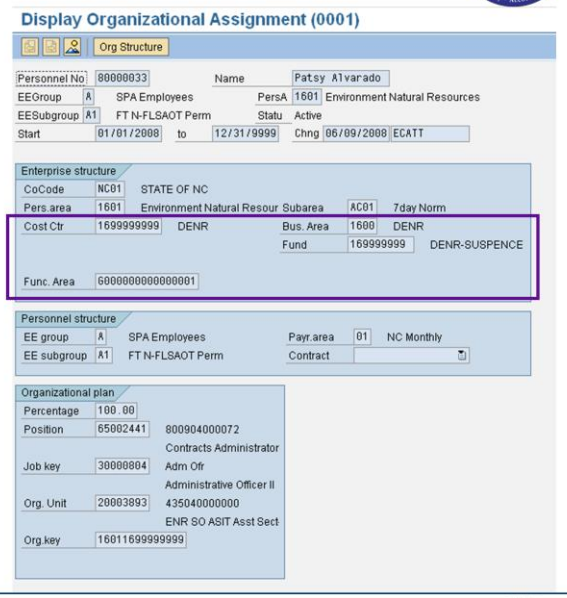
- Calendar assignment
- Relationship to the state (regular vs. temp vs. elected vs. contractor)
- Quota accrual rules/requirements
- Work schedule rule (to restrict the available work schedules)
- Working period (which defines Overtime Period)

See the *Personnel Area and Subarea* (PSA) Job Aid for detailed information concerning the relevant PSAs associated with each Personnel Area. Job Aids are accessible online at the BEACON University website:

www.BEACON.nc.gov/training/index.html

Miscellaneous Fields

- Cost Center
- Fund
- Functional Area
- Business Area



SLIDE 25

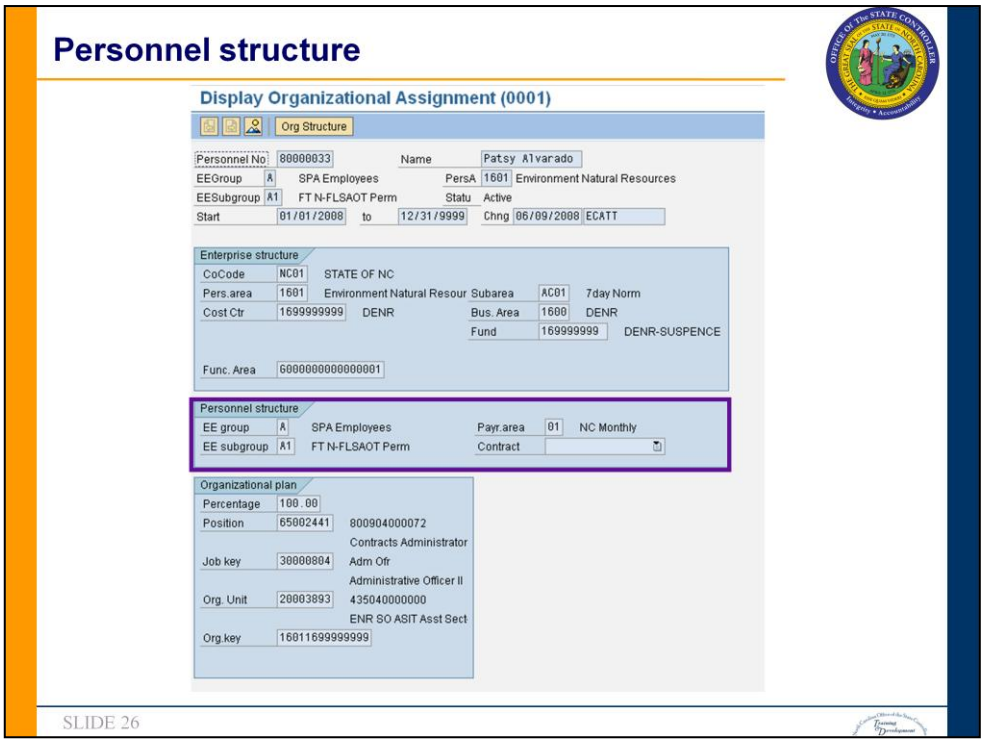
Notes:

The **Cost Center, Functional Area** and **Fund** fields defaults from the Organizational Unit and therefore be grayed out. There is only one Functional Area for the whole *State*. There is only one default Cost Center and one default Fund per *agency*. Neither the Functional Area nor the Fund are associated with the position.

A **Business Area** is a unit within a company code used by Finance. The Business Area is the lowest level at which a complete set of income statements and balance sheets can be processed. The Business Area represents a separate area of operations or responsibilities within an organization.

In most cases, the Business Area represents an agency. The exceptions are:

- Justice (SBI)
- HHS (403-b)
- CCPS (Highway Patrol)



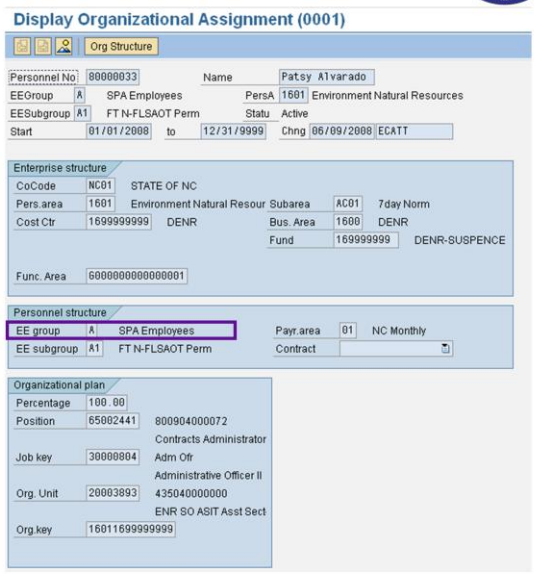
Notes:

The Personnel structure is comprised of:

- Employee Group
- Employee Subgroup
- Payroll Area

Employee Group

- Assigns employee appointment type
- Establishes rules for calculating leave and managing pay



SLIDE 27

Notes:

In addition to identifying the employment status and the employee's relationship to the State, the **Employee Group** also establishes business rules for calculating leave and personnel calculation rules for managing employee pay. This also provides for benefit eligibility determination in concert with further use in alternative reporting combinations. The table below illustrates just a few examples of the State of North Carolina Employee Groups.

A – SPA Employee (subject to State Personnel Act)

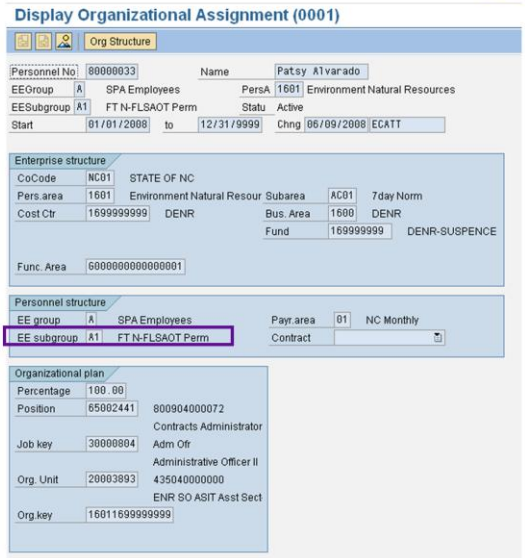
B – SPA Law Enforcement (subject to State Personnel Act)

K – EPA Employees (Exempt from State Personnel Act)

O – Supplemental Staff (temporaries, pick up firefighter, National guard, contractor, etc.)

Employee Subgroup

- Defines employee work status (full time, part time) and the work schedule
- Determines detailed and specific calculation rules for employee pay
- Defines subject or not subject to FLSA Overtime (OT)



SLIDE 28

Notes:

The **Employee Subgroup** defines whether the employee is subject or not subject to the Fair Labor Standards Act (FLSA) overtime, and full-time/part-time status. It is also used to determine other types of Personnel Calculation Rules specific to the combination of groups and sub-groups. The employee subgroup for the Personnel Calculation Rule allows payroll to define different payroll procedures for different employee subgroups. Some examples are:

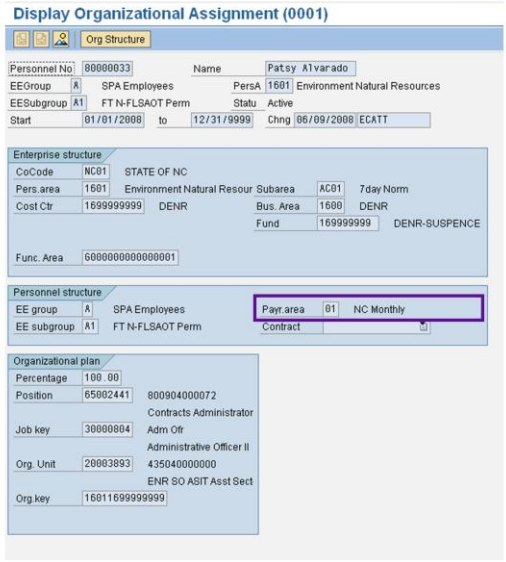
- A1 FTN-FLSAOT Perm [Full Time Not-(subject to) FLSA Overtime Permanent]
- B1 FTS-FLSAOT Perm [Full time Subject (to) – FLSA Overtime – Permanent]
- Y8 PTS-FLSAOT Trne [Part-time Subject (to)-FLSA Overtime-Trainee]

The employee groups and subgroups are the same as those used in PMIS; however, they are organized very differently. There are many combinations of Employee Groups and Subgroups in SAP. If the incorrect Employee Group and Subgroup are entered, it impacts time, work against, dual employment, benefits, and pay. As covered in PA200, you can continue to see why accuracy is so critical when data is entered.

See the *Employee Groups and Subgroups* Job Aid for details concerning the various groups and subgroup combinations.

Payroll Area

- Describes the pay frequency and payroll cycle for each employee
- Defaults based on personnel area, personnel subarea, employee group, and employee subgroup
- **Examples** – Monthly, Biweekly



SLIDE 29

Notes:

The **Payroll Area** is derived from a combination of personnel area, personnel subarea, employee group and employee subgroup. The payroll area determines payroll cycle.

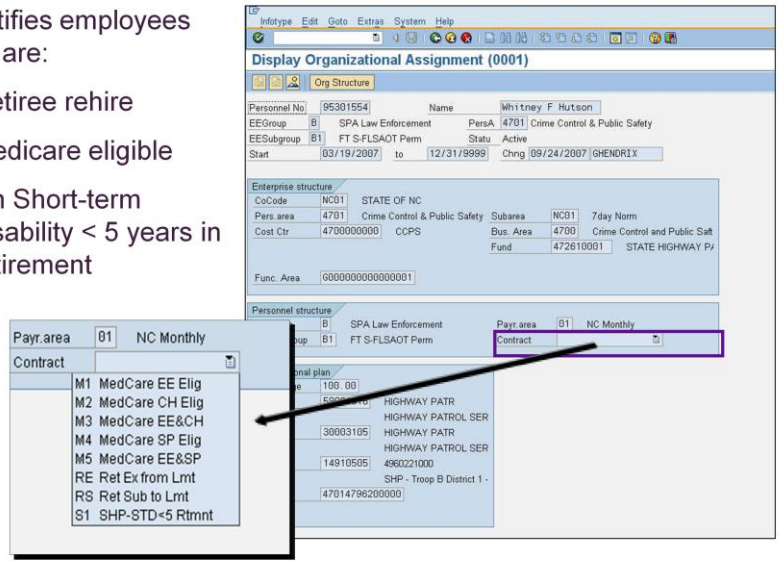
SAP uses payroll areas to group together employees from whom payroll is run at the same time, and also to set the dates for the payroll period.

All temporary positions are in the biweekly cycle!

Work Contract

Affects benefits and identifies employees who are:

- Retiree rehire
- Medicare eligible
- On Short-term disability < 5 years in retirement



SLIDE 30

Notes:

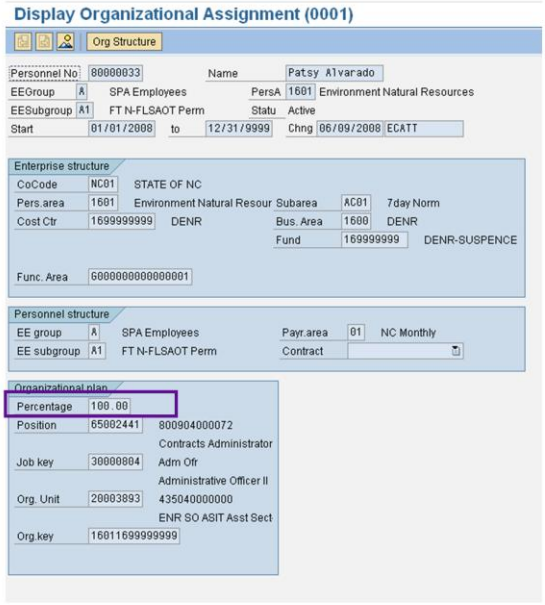
Benefits adjustments are made as applicable when the Contract field is populated. The Contract field is used to identify employees who meet the following criteria:

- Medicare eligibility – the employee pays an adjusted deduction for the State Health Plan (SHP) because Medicare rates are applied.
- Retiree rehire – a indication of whether the retiree has earning limitations or no limitations.
- Short-term Disability (STD) – used to change the State Health Plan deduction to full employee cost when an employee is out on Short-term Disability leave and has fewer than 5 years of service in the Retirement system.

Medicare eligibility and STD enables the system to collect the correct premium amount for health insurance as well as controlling the cost of SHP.

Retiree rehire earning limitations are used to report to ORBIT employees who are subject to earning limitations.

Percentage



SLIDE 31

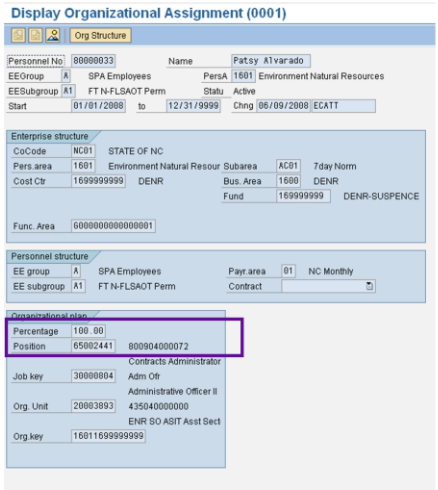
Notes:

The **Percentage** will always be 100% and identifies that the employee is working 100% of what he or she was offered and accepted.

For example, if an employee accepted a full time position at $48,000, that employee's percentage will be 100%. By the same token, if a position is going to be shared, with two employees each working 20 hours at $20,000, each of those employee's percentage will also be 100% (because each employee is working 100% of what was offered and accepted, which is a 20-hour work week at $20k).

Organizational Unit

- An entity within the organization
- Example:
  - Wildlife (Agency/department)
    - Conservation Education (Division)
      - Communication (Section)
        - » Magazine (Branch)



SLIDE 32

Notes:

An **Organizational** (Org) **Unit** is an entity within the organizational structure. An Org Unit can be the State of North Carolina, agencies/departments, divisions, sections, branches, work groups, or units throughout the organization.

Positions and the people who hold positions are assigned to an Organizational Unit. An Org Unit can have subordinate Org Units reporting to it, or it can be a subordinate that reports to another Org Unit.

EE HR Overview (ZEMP)

EE HR Overview

As Of: 09/21/2009 Run Date: 09/21/2009

Employee Data

PERNR:	80000326		
EE Name:	Kumar Reinaldo01		
Employment St:	Active		
Personnel Area:	Cultural Resources		
EE Group:	SPA Employees		
EE Subgroup:	FT N-FLSAOT Perm		
Personnel Subarea:	7day Norm		
Ann Sal/Hr Rate:	$35,500.00		
PS Group:	GR68	Level:	GR
Cap.util.lvl:	100.00	WkHrs/Pd:	173.33 Monthly
DOB:	08/28/1956	Gender:	F
Ethnic Origin:	White (Non-Hispanic/Latino)		
Disability:	None/Prefer not to report		
Military Status:	Reserve		
Veteran Status:	Non-Veteran		
State EOD:	01/01/2008	Agency EOD:	01/01/2008
Length of Service:	000 Mths		
Est Long Due Date:	03/2010		

Latest EE Action & Salary Changes:

Most Recent Actn:	New Hire (NC)
Reason:	New Hire
Action Date:	01/01/2008
Amt Last Sal Chg:	$0.00
Salary Chg Date:	01/01/2008

Position Data

Position:	65001574 - Historic Sites Specialist II
Job:	30001542 - Historic Sites Specialist II
Supervisor:	80000124 - Jessica Hunter
Org Unit:	20010138 - CR CDS Eastern Region Representative
EE Group:	SPA Employees
EE Subgroup:	FT N-FLSAOT Perm
Personnel Subarea:	7day Norm
Budgeted Salary:	$35,500.00
Exempt Status:	No

Time Data

Time Management St:	1 - Positive Time Recording			
Working Week:	07 - Wk - Sun (mdnt) - Sat			
Work Schedule Rule:	D01N086N - MTWHF-8,SaS-O			
OT Comp:	Y	365	Holiday Payout:	Y 365
Extended Duty:	N	0.00	Holiday Premium:	50%
Callback:	N	0.00	EV Premium:	N 00%
On-Call:	N	0.00	WK Premium:	N 00%
Gap Hrs:	N	000	NS Premium:	N 00%

Disclaimer: Not for Public Information

SLIDE 33

Notes:

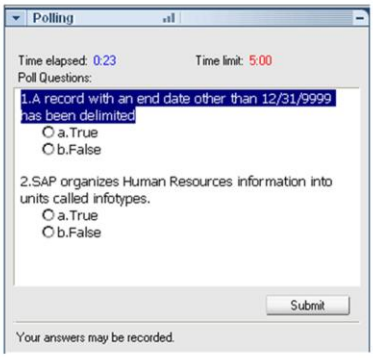
The Employee Overview screen is a “snapshot” of an employee’s information.

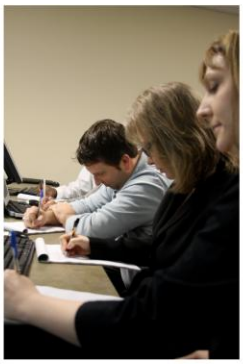
The transaction is initiated by entering data to define who and what time frame an HR user needs to view a particular employee’s information.

1. Enter **ZEMP** in the Command field on the Easy Access screen and press the Enter key or click the green check ball.
2. Enter an Employee ID.
3. The current date defaults into the Selection Date field. You have the option to enter any date that the employee has data in the system. If you enter a date that is not valid, you receive the message ‘No Information for the date Entered’. If you are not authorized, you will receive a message indicating that you do not have authorization.
4. Click the Execute button to perform the transaction.

Knowledge Check Poll #2

Use your computer to answer the questions and then click **Submit**.





SLIDE 34

Notes:

1. The elements that determine an employee's Personnel Subarea assignment involve time and leave accrual rules.

   ❍ a. True
   ❍ b. False

2. The Company Code is the highest level of the organizational structure.

   ❍ a. True
   ❍ b. False

3. Enter one of the two agencies that belongs to Company Code NC02.

4. An Employee Subgroup such as FT N-FLSAOT TL indicates the employee is a permanent employee who will receive overtime pay when applicable.

   ❍ a. True
   ❍ b. False

Job versus Position (1 of 2)

Job

- Defines general classification of functions and duties that are identical across the State
- Has a one to many ratio to positions
- Defines EEO, Job Group, and Census Codes
- Is not held by a person
- Is the basis for creating positions
- Is maintained by BEST Shared Services

Position

- Represents specific tasks performed by a person
- Has a many to one ratio to jobs
- Belongs to an Organizational Unit
- Inherits attributes from the job and organizational unit
- Is held by a person
- May be classified as Chief position
- Is maintained by agency and BEST Shared Services

SLIDE 35

Notes:

A **job** is the foundation from which positions are created. A job is a general *classification* of duties and attributes. Typical attributes are: function, job family, FLSA status and role. One job can be used to create many positions. A job is identified by a unique number. When you hear the term *class* or *classification* you immediately know that a job is being referenced. Of course, the converse is also true—when you hear job, you know it is a *class*.

A **position** inherits the general classification of duties and attributes from the job. However, additional specific tasks and duties are added to the position. Many positions can be created from only one job. Each position has its own unique number as an identifier.

In OSC HR/Payroll, you can see both the job (class) and the position title for an employee.

Job versus Position (2 of 2)

Official Job (Class) Title	Position (Working) Title
• Engineer (graded)	• Water Quality Engineer • Air Quality Engineer • Building Systems Engineer • County Maintenance Engineer • Elevator Engineer • Environmental Engineer
• Forestry Technician (banded)	• County Ranger • Nursery Technician • District Ranger

SLIDE 36

Notes:

An example of a job (class) and its related positions is engineering. There may be several different types of engineers in the organization. Each engineer position has its own specific tasks and duties; however, some general information is common to all engineer positions. That general information is created in the job and then used as a template to create the various engineer positions. The specific information pertinent to each engineer position is then added at the position level.

The relationship between jobs and positions is the same in both graded and banded jobs and positions.

Positions

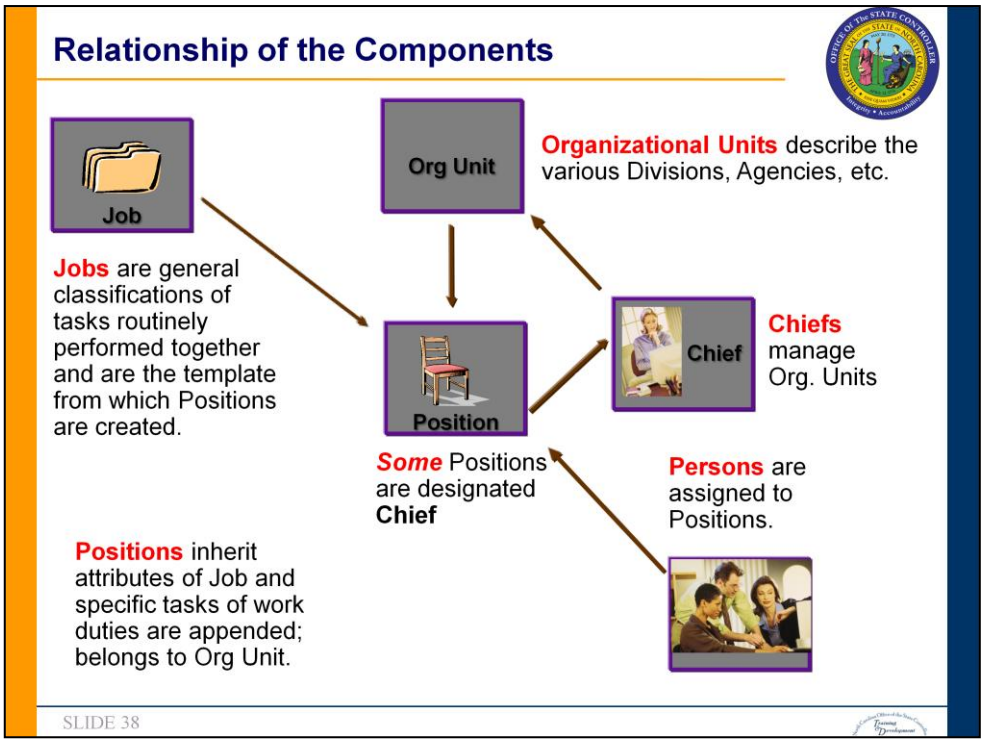
- A person holds a position
- Supervisors or managers who manage org units are identified as Chiefs
- A Chief manages his or her org unit and any subordinate org units
- A Chief reports to other Chiefs just as org units report to other org units
- Only one Chief is assigned to an org unit
- Position numbers are sequentially assigned

SLIDE 37

Notes:

A position is described by a job and held by a **person**. In SAP terms, a person is a holder of a position, and is not a holder of a job. When a person is hired using the PA modules, he or she is assigned to a position that resides in an organizational unit. It is important to remember that an employee's personnel record contains the position name and number, org unit name and number, and job name and number as well as the person's name and personnel number. In OSC HR/Payroll, position numbers are assigned sequentially. There is no set numbering convention.

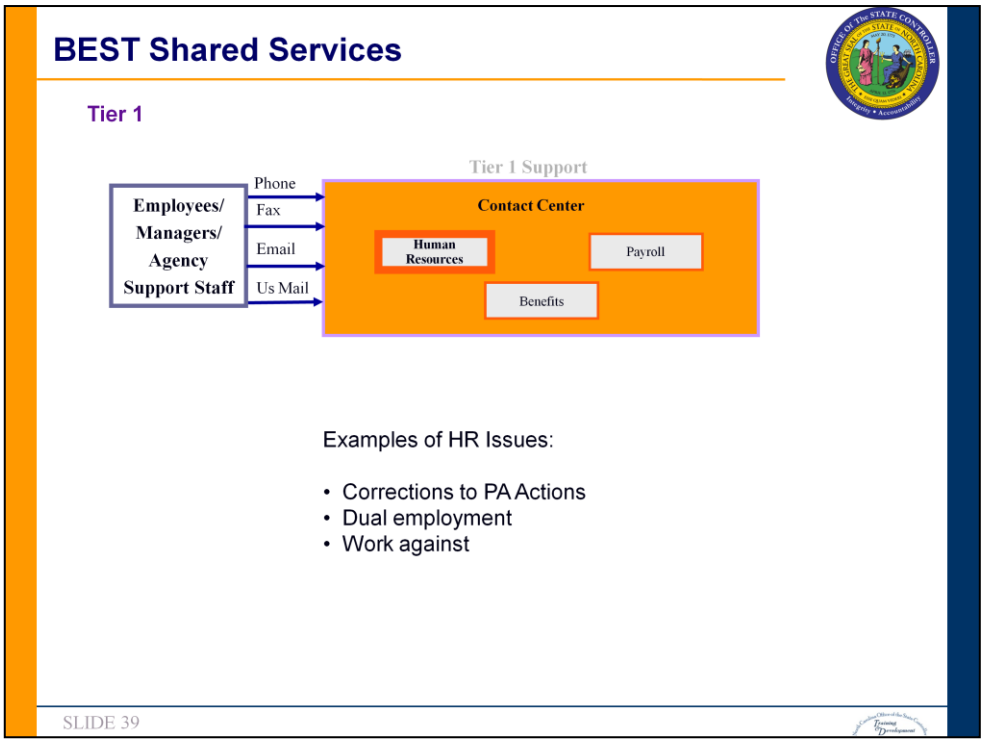
Some positions are designated as Chief positions. Any position that manages employees and/or an organizational unit is designated a Chief position. When you think of a traditional organizational chart, you know that managers usually report to an upper level manager, and the division, agency or department reports up the organization as well. The same is true for the Chief position and the organizational unit that he or she manages.



Notes:

As illustrated, the Org Unit, Job, Position, and Persons are related. After the Org Unit is created, a Position is created from a Job and assigned to the Org Unit. The Position may be classified as a Chief Position if it manages an Org Unit. Persons are assigned to the various Positions.

Org units, Jobs, and Positions are maintained in the Organizational Management modules which are not part of Personnel Administration. However, it is necessary that you have a general understanding of how the components are related.



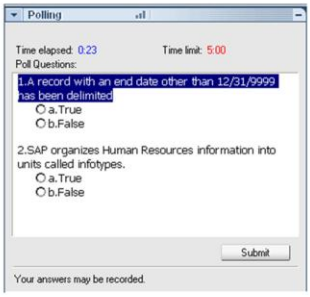
Notes:

The BEACON Enterprise Support Team (BEST) Shared Services is a group of employees and managers who provide a point of contact to answer questions as well as research and resolve issues. BEST Shared Services is:

- A team of support specialists with access to common knowledge content and management tools
- A single point of contact for all initial questions
- Available to employees, managers, business partners, and Agency support staff
- Able to either provide immediate answers, or route calls to appropriate expert or support group
- Able to establish Alerts for known issues
- Available via phone, fax, email, or US mail
  - 1-866-NCBEST4U (1-866-622-3784)
  - 919-707-0707 - in Raleigh
  - **BEST@osc.nc.gov**
  - Fax: 919-855-6861
- Hours of operation:
  - 8:00 am to 5:00 pm

Knowledge Check Poll #3

Use your computer to answer the questions and then click **Submit**.



SLIDE 40

Notes:

1. Enter the percent value that should always display in the Percentage field on the Organizational Assignment infotype, even if the employee is part-time.

2. A person holds a:

   - a. Job
   - b. Position

3. A position inherits the general classification of duties and attributes from the job.

   - a. True
   - b. False

4. In OSC HR/Payroll, position numbers are not assigned sequentially; therefore the numbers identify certain parameters such as the agency, etc.

   - a. True
   - b. False

Lesson Review

In this lesson, you learned to:

- Identify and define basic SAP Personnel Administration terms
- Explain the importance of dates in SAP HR/Payroll

SLIDE 41

Notes:

Course Map – PA Overview

- Lesson 1: Terms and Definitions
- **Lesson 2: Display Employee Data**
- Lesson 3: Course Review

SLIDE 42

Notes:

Lesson Objectives

Upon completion of this lesson, you should be able to:

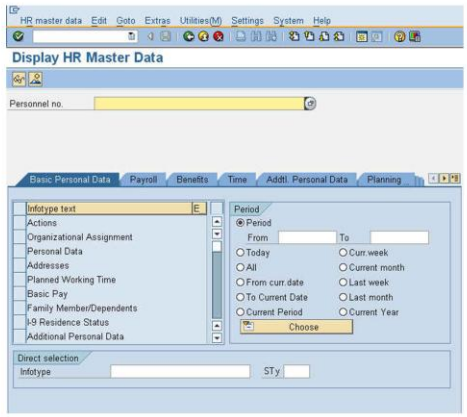
- Differentiate between the two display transactions
- Locate employees in SAP
- Display an Action and associated reason for the Action
- Display an individual infotype

SLIDE 43

Notes:

Transaction Codes

- PA10 – Use to display the personnel file
- PA20 – Use to display individual infotypes in PA



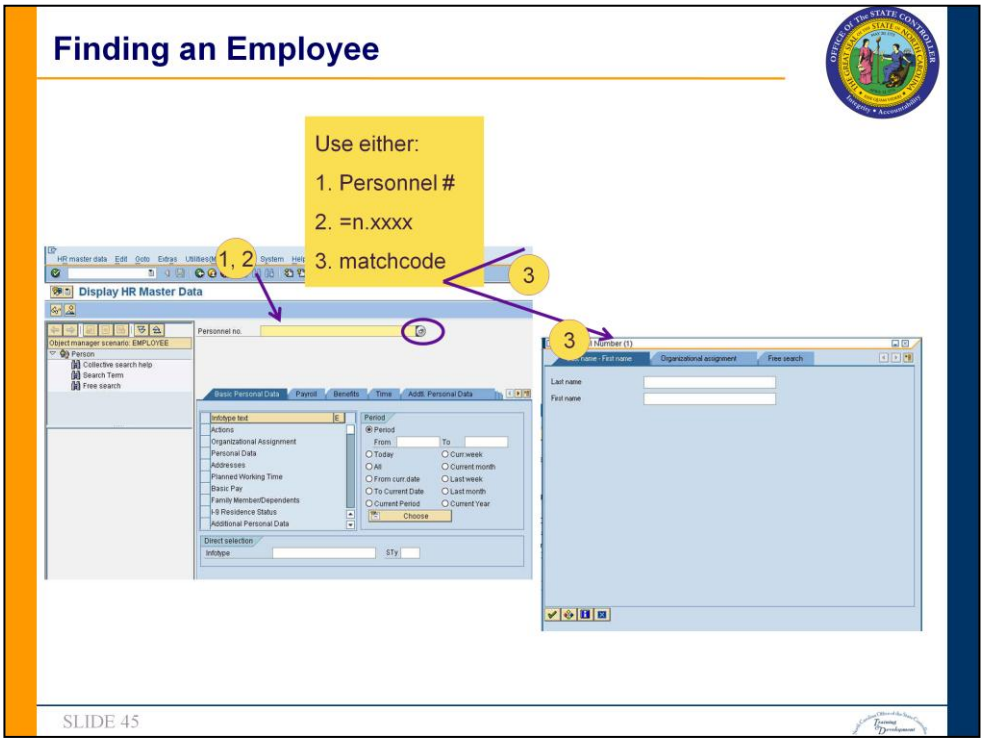
SLIDE 44

Notes:

To display personnel information, you will use either transaction code **PA10** or **PA20**. With the exception of Shared Services, you will only see the employees within your own division or agency. In a similar manner, you will only see those infotypes to which you have the security access to view. For example, if an employee has a grievance infotype, but your security access doesn't include grievances, you will not be able to see that record for your employee.

PA10 is used to display an employee's personnel record. It is the equivalent of having a personnel record on several pieces of paper stapled together in logical sequence. Using PA10 is an efficient way to look at the personnel record.

PA20 is used to display individual infotypes. Using PA20 saves time when you need to look at only one or two pieces of information in a personnel file. For example, if you only need to view the employee's salary, you can go directly to the Basic Pay infotype (0008). However, if you used PA10, you would have to page forward until you reached that particular infotype.



Notes:

Before you can display employee data, you must identify the employee that you want to view. There are a variety of ways you can identify or search for an employee:

1. Enter the personnel number into the *Personnel no*. field.
2. Use the shortcut in the Personnel No. field to search for the employee using the last name:

   =n.xxxxx (equals, n, dot, last name)—no spaces
   Example: =n.Hendrix

   A list of all of the employees with that last name displays. Double-click to select the appropriate employee and press **Enter**.
3. Use the match code at the end of the Personnel No. field. You can then search for the employee by last and first name, personnel number or org assignment.

NOTE: Many SAP fields contain a matchcode, indicating that you can search for applicable information for the specific field.

Viewing Icons

- Use any of the applicable functions to view employee records:
  - *Display*
  - *Overview*
  - *Next Record*
  - *Previous Record*
  - *Choose (drill down)*

SLIDE 46

Notes:

After you access an infotype, there are several ways you can view and navigate within the records, as illustrated above.

When you use the Overview function, observe that the transactions for the infotype display in a list, or summary. The most current record (with the data 12/31/9999) is at the top of the list.

Instructor Demonstration

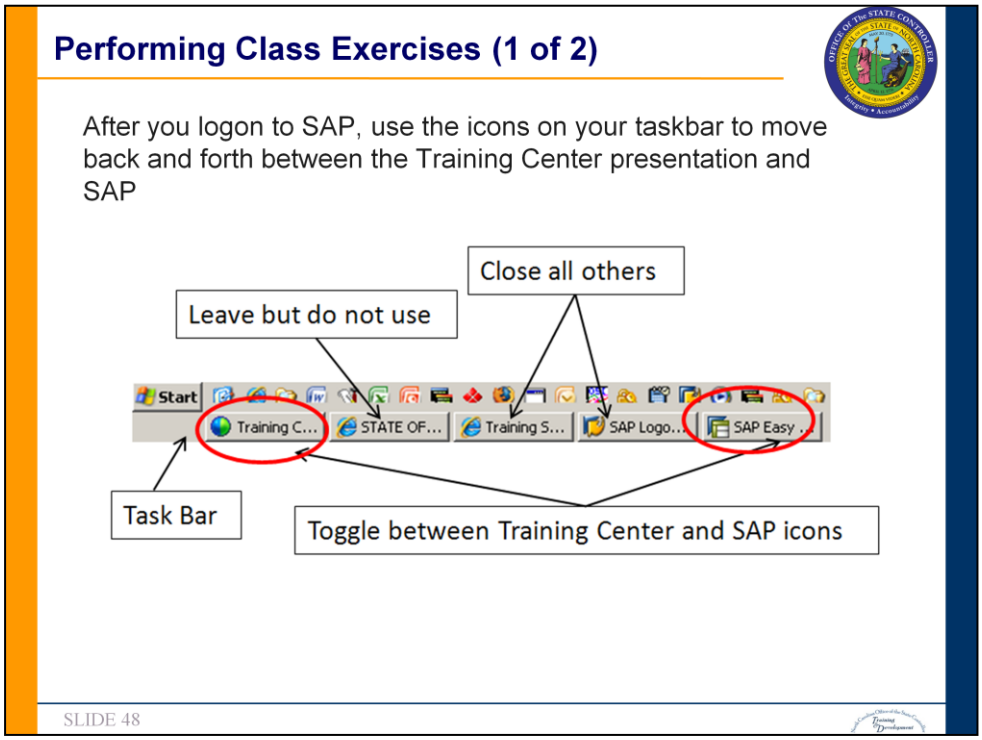
Log on to SAP

- In this demonstration, the Instructor will:
  - Access the SAP training client
  - Enter the training User ID and password
  - Stop at the Easy Access screen

SLIDE 47

Notes:

Watch as the instructor illustrates how to log on to the SAP training client, enter the user name and password, and access the Easy Access screen.



Notes:

To perform exercises in a virtual class, you will navigate back and forth between the SAP application and the Webex Training Center. You will close some of the icons that appear on your taskbar to make it less confusing about which icons to use.

Look at the bottom of your screen now and you should see two icons:

- State of NC- Office of Controller WebEx
- Training Center

You will leave both of these open during the course. If you have other applications open, you should close them now.

Click the green check to let the Instructor know you see these two icons on your taskbar.

Performing Class Exercises (2 of 2)

After you complete a Virtual class exercise in BEACON SAP:

- Access the Training Center from your taskbar

- In the Participant's panel, click the **green check** icon

- Leave the green check active – the instructor will clear it

SLIDE 49

Notes:

By using the green check to indicate you have completed an exercise, the instructor can see at a glance those students who may need additional time.

Exercise #2.1

Log onto SAP:

1. Use the task bar to open a new internet window.
2. Access SAP with your own User ID and password.
3. Click the training GUI.
4. Click Training Sandbox E1T 899.
   a) If necessary, enter your own user id and password again.
5. The Easy Access screen displays.
6. On the taskbar, **leave open** the **Training Center, SAP Easy Access** and **State of NC** icons; close all other icons.
7. Click the Training Center icon on your taskbar to return to the Training Center.
8. Use the **Green Check** icon to let the Instructor know you have successfully logged on. The Instructor will remove the check.

SLIDE 50

Notes:

Instructor Demonstration

In this demonstration, the Instructor will:

- Use the menu path to access PA10
- Illustrate how to search for an employee using the matchcode
- Use the following functions:
  - *Display*
  - *Overview*
  - *Next Record*
  - *Previous Record*
  - *Choose (drill down)*

Employee name:

- **Maureen Ahmed**

SLIDE 51

Notes:

Watch as the instructor illustrates how to use the menu path to access PA10. The instructor will search for Maureen H. Ahmed by using the matchcode and the employee's last name.

1. From the SAP Easy Access screen, use the following menu path:

   Human Resources > Personnel Management > Administration > HR Master Data > Personnel File
2. Double-click Personnel File.
3. Click the **matchcode** button on the Personnel File screen.
4. At the *Personnel Number (1)* screen, type **Ahmed** in the Last Name field.
5. Click the **Start Search** button. A list is displayed, even if there is only one employee with the last name. Double-click the applicable employee. The employee's personnel number is populated in the Personnel No. field. You must press **Enter** in order for the employee's name to display on the screen.
6. Use the various function icons to display, move to next record, or drill into a record.

NOTE: As an alternative to using the menu code, you can enter the transaction code directly into the Command field and then press Enter.

2.2 - Exercise

Scenario

You want to view the employee's entire personnel file. You prefer to see all of the data rather than viewing the infotypes individually.

Transaction Code: PA10 Personnel File

- Use the menu path to access PA10
- Use the matchcode to search for the employee
- Select the appropriate employee
- Use the various icons to navigate in the records
- Employee name:
  - **Maureen Ahmed**

SLIDE 52

Notes:

Use the menu path on the previous page to access transaction code **PA10**. As you progress through each infotype (screen), observe the name and the fields so that you can become familiar with the various types of information on each one.

Questions/Results:

1. On what date was the employee hired?_____

2. T or F: The New Hire date is the most current record____

   How do you know your answer is correct? _____

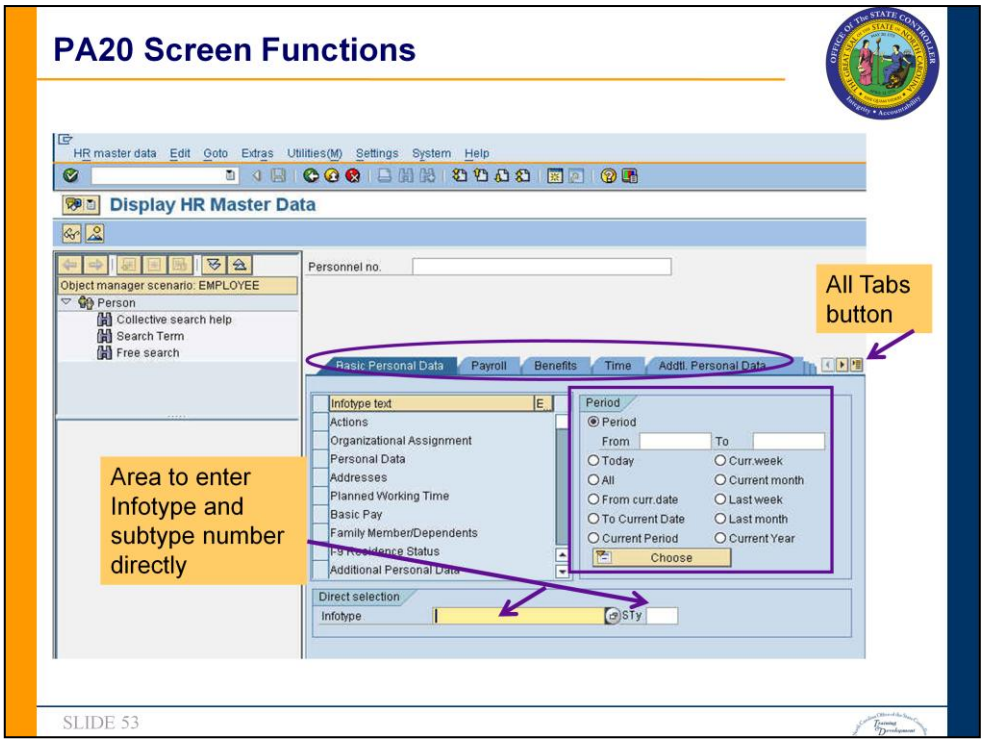
3. What is the employee's position number? _____

   Position title?_____

4. What is the employee's personnel number?_____

5. Which infotypes did you use to find this information? _____

Return to the Training Center and click the green check to indicate you are finished.



Notes:

When you use PA20 to access the *Display HR Master Data* screen, you can use several options to choose the individual infotypes you wish to view:

Tabs: The infotypes are grouped together by subject matter on a Tab menu. Merely select the Tab you want to access, or use the display all tabs button.

Period: You have various options regarding the time frame you wish to use when displaying an infotype. It is important when you are viewing infotypes to ensure that you have selected the appropriate time frame. If an infotype does not display, it could be because it was not valid during the time period you have selected. Some infotypes only displays if the *All* option has been selected.

Direct Selection: You can either enter the infotype code and subtype in the *Direct Selection* field, or use the matchcode to search for the infotype by name.

The left panel, the Object Manager, can be hidden from view by selecting **Settings > Hide Object Manager** on the menu.

Instructor Demonstration

Display an employee's Actions

- In this demonstration, the Instructor will:
  - Use the short cut method to display a different transaction code
  - Use the short cut method to find an employee
  - Use PA20 to view an Employee's Actions
- Employee's name:
  - **Nicole Milam**

SLIDE 54

Notes:

The instructor will first demonstrate how to change from one transaction code to another without going back to the Easy Access screen. By using /nxxxx (where x represents the new transaction code), you can immediately go from one transaction to another. For example, /nPA20 immediately takes you to PA20. **Using this short cut method when you are entering data, however, does not prompt you to save your data.** Also, if you are already on the Easy Access screen, you do not need to enter /n.

In addition, the instructor will use the =n.xxx shortcut method to find the employee.

Once again, as the instructor moves through each infotype (screen), observe the name and number of the infotype and review the fields on the individual infotypes so that you can become familiar with the various types of information on each one.

1. In the Command field, type **/nPA20**.
2. Press **Enter**.
3. At the *Display HR Master Data* screen, type **=n.milam** in the *Personnel No.* field.
4. Press **Enter**.

2.3 - Exercise

Scenario

You want to view the employee's Actions information. You don't want to scroll through several pages of information to view the data you are seeking. Use the appropriate transaction code and the instructions on the previous page to view the Actions infotype.

Infotype

Actions

Transaction code PA20

Employee's name: Nicole Milam

SLIDE 55

Notes:

Use the instructions on the previous page to access **PA20**.

Questions/Results:

1. Besides the new hire, what other Actions and reasons have been entered for the employee?
   _____

2. Was the employee's salary affected by any of the Actions? _____. If yes, what was the previous salary?_____. What is the current salary?_____

3. Which infotype did you used to find this information?
   _____

Return to the Training Center and click the green check to indicate that you are finished.

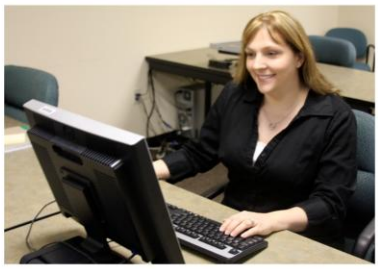
2.4 - Exercise

Scenario

- View information about an employee's marital and veteran status as well as the social security information.

Employee

- Elizabeth Watkins



SLIDE 56

Notes:

Scenario:

Use the search method of your choice and view the employee's information. Answer the questions below.

Transaction code: *PA20 Display HR Master Data*

Questions/Results:

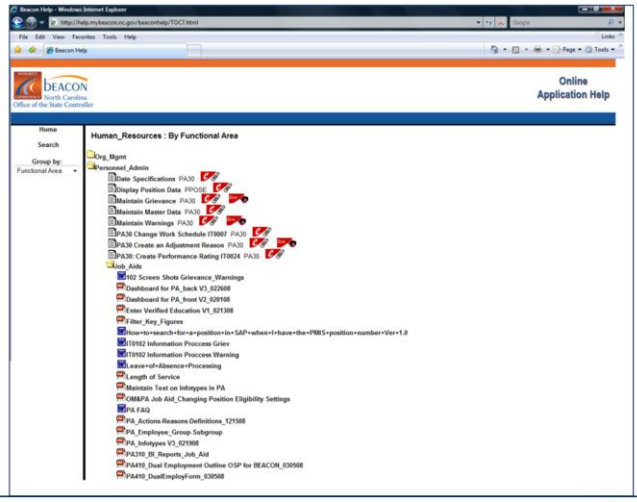
1. What is the marital status?_____
2. T or F: The employee's Personnel Number is the same as the Social Security Number._____

   How do you know your answer is correct without even looking at the numbers? _____
3. Does the employee have military status? _____
4. Has the employee identified disability status?_____
5. Which infotypes did you used to find this information?

   _____

Access BEACON Help

- Open a new web browser
- Access BEACON University
- Follow the menu path to access job aids



SLIDE 57

Notes:

The *PA Infotypes* Job Aid contains a list of many of the infotypes used in Human Resources including the code and a brief description. The *Dashboard* front and back is a quick reference version of the job aid.

Menu path:

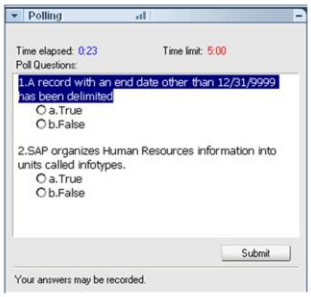
1. From your website, access BEACON University Training > Courseware & Job Aids > Job Aids and Business Process Procedures (BPP) > Table of Contents by Functional Area > Human Resources > Personnel Administration > Job Aids.
2. View the following job aids:
    - Dashboard for PA back
    - Dashboard for PA front
    - PA Infotypes

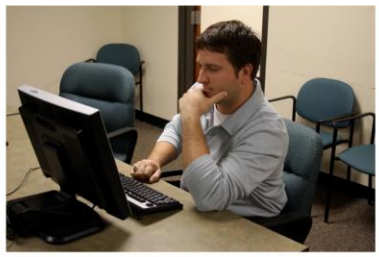
Other job aids that might be useful include:

- PA Employee_Group_Subgroup
- Personnel Area_Subarea

Knowledge Check Poll #4

Use your computer to answer the questions and then click **Submit**.





SLIDE 58

Notes:

1. Enter the transaction code that is used to display individual infotypes.

2. Events in the life cycle of an employee in OSC HR/Payroll are defined by a specific infotype called Actions.

   - a. True
   - b. False

3. If an infotype does not display, it could be because the information was not valid during the time period you have selected.

   - a. True
   - b. False

Lesson Objectives

In this lesson you learned to:

- Differentiate between the two display transactions
- Locate employees in SAP
- Display an Action and associated reason for the action
- Display an infotype

SLIDE 59

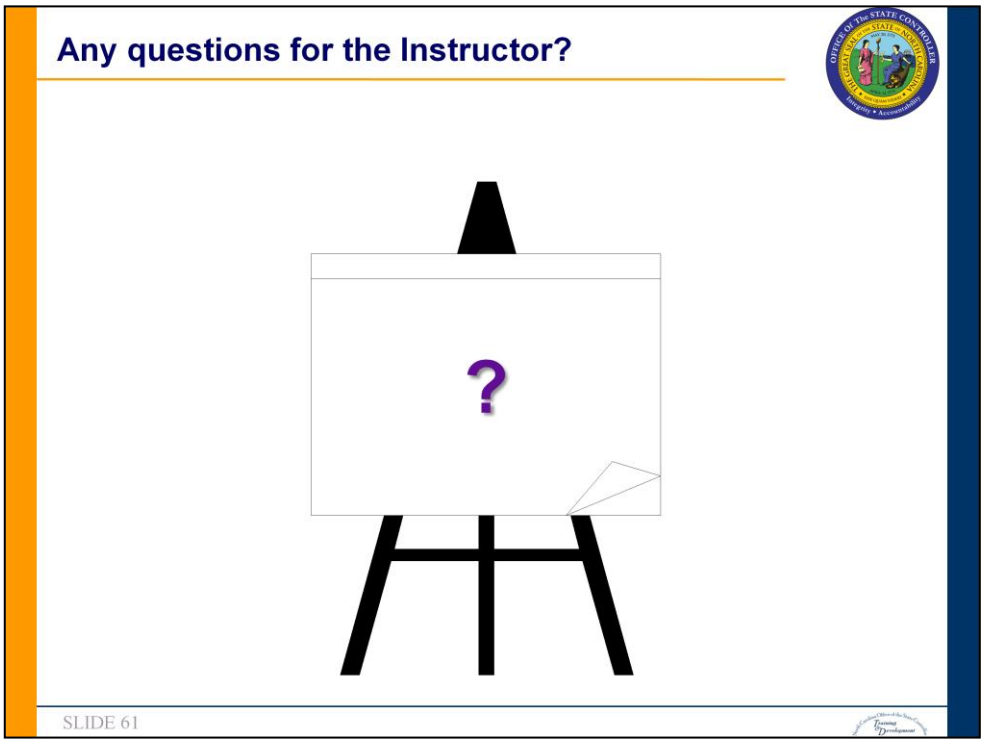
Notes:

Course Map – PA Overview

- Lesson 1: Terms and Definitions
- Lesson 2: Display Employee Data
- **Lesson 3: Course Review**

SLIDE 60

Notes:



Notes:

Course Review

In this course you learned to:

- Define key terms and processes
- Display information in an employee's SAP personnel record
- Distinguish between the display transaction code

SLIDE 62

Notes:

Next Steps

- Monitor OSC HR/Payroll communication
  - BEST Shared Services web site (especially the Updates tab)
  - URL: http://www.osc.nc.gov/BEST/index.html
- Review conceptual materials
- Access BEACON Help
  - Access from an SAP transaction
  - URL: http://help.mybeacon.nc.gov/beaconhelp
- Practice what you've learned
  - URL: https://mybeacon.nc.gov
  - Client 899
  - Use your current NCID user name and password

SLIDE 63

Notes:

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON Help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON Help from within an SAP transaction.

Level 1 – Course Evaluation

SLIDE 64

Notes:

Please listen as your instructor explains the Course Evaluation process.

Conclusion

CONGRATULATIONS!

When you have completed the class, you may:

- Hang up the telephone
- Exit the virtual classroom

SLIDE 65

Notes:

Thank you for attending and participating in the virtual classroom session of this course.