



Release 1 Update and other Topics April 13, 2010



HR Conference Call Agenda – April 13

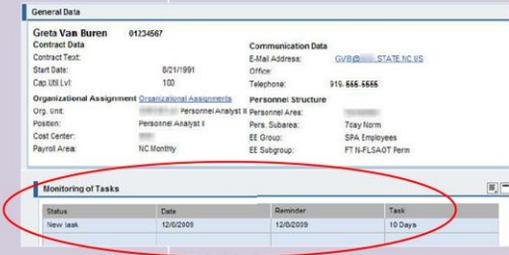
- Release 1 topics
- Employee Group/Subgroups and Wagetypes
- Date Specification modifications – IT 41
- Social Security Mismatches
- OM Workshops
- Performance IT loaded/refreshed
- Org Unit can be added to ERP reports
- BI Time Reports Update
- Data Migration Update – Employee and Position History
- Coming Attractions – Fall Release



Date	Deliverable	Notes
Feb	ESS W2 Reprint Capability	
Feb	Adverse Weather Fixes	
Feb	Added <i>Fax Number</i> to vacancy posting	



Pre-Released cont.

Date	Deliverable	Notes
Feb	Managers can view <i>Monitoring of Tasks</i> in MSS	
March	State Health Plan Changes for 2010	Added smoking attestation criteria

Release 1, 2010



	Deliverable	Notes
☺	BI: <i>Variable Screen</i> button moved from filter screen to main screen 	This change will reduce steps to get to variable screen
✓	Employee Group, Subgroups, and Wage Types	See next slides for details

5

✓ In release as promised X = Didn't make release ☺ = Added to release



Release 1, 2010 - New Subgroups

- 48 new Employee Groups/Subgroup for School of Science and Math
 - EPA 10M, 11M and 12M contract employees
 - These groupings only exist for SPA currently
- 4 new Employee Subgroup for Department of Transportation
 - SPA LEO Bi-Weekly employees subject to FLSA
 - To support time processing rules regarding subject versus non-subject employees
- 16 new Employee Subgroups for 115C Teachers in DHHS, DOC and DJJDP
 - Correcting the designation from SPA to EPA



Release 1, 2010 - New Subgroups

- 16 new Employee Subgroups for AOC
 - 4 ESGs – for EPA Law Enforcement Officer groupings
 - To correct setting from SPA to EPA
 - 12 ESGs for Assistant Defenders
 - Benefit rules - eliminates manual entry by BEST to move to TSERS from Judicial plan

NOTE: Personal Services Contractors subgroup will NOT be in release; under OSP review

Please hold off on other actions for these specific employees and positions until these changes are entered. If you need to initiate a change, please contact your HR Specialist first.



Employee Group/Subgroup Changes

- In system with upcoming release – April 19, 2010
- To be effective May 1, 2010
- Employee Group/Subgroup on both employee and position
- Usually the same for both employee and position
- Different MAYBE if a work against, trainee or probation
- Most changes on SUBGROUP



Biggest Change – EPA Employees (K) Subgroup

- The position exempt type will no longer be repeated in the Employee Group/Subgroup.
- Only two choices now –
 - FT EPA indicating Full Time employee (1) OR
 - PT EPA indicating Part Time employee (2)
- Other subgroup choices have an N/A placed in front of description and should not be used in future for anything.
- For Example:
 - N/A EPA Ex Managerial
 - N/A EPA Constitut Off
 - N/A EPA Chief Deputy



Release 1, 2010 - New Wage Types

- 2 for AOC
 - For Attorneys in TSERS
 - Benefit rules - get same benefits as Public Defenders but are treated like standard AOC employees in every other way
- 1 for School of Science and Math
 - For SPA 11 month, no contract employees
- 1 for 115c Teachers in DHHS, DOC and DJJDP



Prep Work for New EE/ESG and Wage Types

- 3/22/10: Impacted agencies were sent spreadsheets to valid which position and employees would change to the new EE/ESG/WageTypes
- 4/12/10: Spreadsheets from agencies are due back to BEST
- 4/19/10: new EE/ESG/WageTypes are available for agencies to use in workflow processing with an **April 19, 2010 effective date**



Authorities and Resources on Position

- Policy making exempt status will be kept only on the position using infotype Authorities and Resources
- Authorities and Resources can only be changed by BEST HR at the direction of OSP
- One of five choices:
 - Confidential Assistant
 - Confidential Secretary
 - Chief Deputy
 - Exempt – policy-making
 - Exempt – managerial



Changes to Date Specifications – IT 41

- Reinstatement from LOA and Transfer within Agency - action will pull a COPY of the current IT. Agency can change the Agency Hire date if necessary. Before, the action effective date was defaulting. Save the infotype.....
- Reinstatement from Separation has not changed. Action presents the Agency Hire Date on IT 41 as date of the current action. Agency can change to prior date if necessary.
- Special functions for Judicial and Lottery
- Temps do NOT have an IT 41....do not create one for them.

Most Actions.... Agency Hire = Effective Date of Action



Create Date Specifications (0041)



Personnel No Name
EEGroup SPA Bi-Weekly PersA Transportation
EESubgroup FT S-FLSAOT Perm Statu Active
Start to

Date Specifications

Date type	Date	Date type	Date
<input type="text" value="01"/> Original Hire Date	<input type="text" value="03/01/2010"/>	<input type="text" value="02"/> Agency Hire Date	<input type="text" value="03/01/2010"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Reinstatement from LOA and Within Agency Transfer: Original dates default.

COPY & SAVE



Copy Date Specifications (0041)

Personnel No Name

EEGroup SPA Bi-Weekly PersA Transportation

EESubgroup FT S-FLSAOT Perm Statu

Start to

Date Specifications			
Date type	Date	Date type	Date
<input type="checkbox"/> 01 Original Hire Date	<input type="text" value="03/01/2010"/>	<input type="checkbox"/> 02 Agency Hire Date	<input type="text" value="03/01/2010"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>



Other "Stuff"

- OM Workshop – if interested send email to Doug Genzlinger indicating the number to be trained.
- Soc Security Number and Names do not match....emails going out – fax copy of SS Card to BEST, include HR Specialist's name as instructed in email – these need to be corrected before end of corrections this month....
- Performance Qualification Loaded this weekend –
 - DO NOT change the dates....
 - Yr. End Cycle report pulls only active, filter for separated
 - Separations loaded except for Lottery and Judicial



Request to Add Organizational Unit as a Selection Criteria to ERP Reports



Selection Criteria

- Original CCB request from DOC
 - “Organizational Structure” should always be an option on all SAP reports; example: PT_ERL00 does not have this option as a button or a further selection choice
- List of reports was generated from agencies input
 - ZPT2013: Quota Corrections Report
 - PT_EDT_TEDT: Time Statement
 - PT_ERL00: Time Evaluation Messages
 - CATC - Time Sheet: Time Leveling (already has org unit on selection screen)
 - PT_QTA10: Display Absent Quota Information

How to add Organizational Unit to Report Selection cont.



Program Edit Goto System Help

Display Absence Quota Information

Further selections Search helps Sort order

Period

Today Current month Current year

Up to today From today

Other period

Period To

Payroll period

Selection

Personnel Number		
Employment status		
Personnel area		
Personnel subarea		
Employee group		
Employee subgroup		
Payroll area		
Organizational unit		

If you want *Organizational unit* to always appear when you run the transaction, you can save this configuration by saving a variant.

Organizational unit is now available in the selection box



How to add Organizational Unit to Report Selection

Program Edit Goto System Help

Display Absence Quota Information

Further selections Search helps Sort order

Period

Today Current month Current year

Up to today From today

Other period

Period To

Payroll period

Selection

Personnel Number

Employment status

Personnel area

Personnel subarea

Employee group

Employee subgroup

Payroll area

Note: there is no Organizational unit selection available in the selection box

Step 1: use *Further Selections* button

Step 2: on the Choose Selection Fields screen, select *Organizational unit*

Step 3: add *Organizational unit* to the Selection fields box, using the add button

Choose Selection Fields

Selection options

Selection options

Company code

Organization key

Business area

Legal person

Work contract

Controlling area

Cost center

Organizational unit

Position

Job

Supervisor area

Administrator group

Payroll administrator

Selection fields

Personnel number

Employment status

Personnel area

Personnel subarea

Employee group

Employee subgroup

Payroll area

Selection: 7

Post-Release



Date	Deliverable	Notes
May	DOA Parking Interface (Phase 1)	Will provide extract files with payroll deductions and employee perner's
May 10	BI Time Reports Pilot	Details will be presented in next section
May 28	Position & Employee History BI Reports	Details will be presented in next section



New Functionality Coming in May

BI Time Reports – Pilot Project



What are BI Time Reports?

- The BI Team is working on a project to extract time data from the ERP system to produce a series of new reports to cover a number of high priority needs such as
 - List quota balances for multiple employees
 - Create an employee time statement for a user defined period
 - Review holiday time reporting for errors
 - Determine who's late in submitting or approving timesheets
 - Review when comp time is aging out

- There are 12 reports grouped into 4 categories
 - Quotas – 6 reports
 - Comp Aging – 1 report
 - CATS – 2 reports
 - Voluntary Shared Leave – 3 reports

- **Reports with detailed absence/attendance data will be limited to dates within the current month and three previous months**



A Big Thank You to Agency SME's/Designers

- SME's from various agencies are working with the BI Team to design and test the reports

Name	Agency
Marshall Barnes	NC Legislature Fiscal Research
Andrea Cannon-Mang	Dept of Justice
Phyllis Creech	Dept of Agriculture and Consumer Services
Matt Daughtrey	Dept of Transportation
Dan Domico	Crime Control and Public Safety
Sherry Forbes	Information Technology Services
Kim Greene	Crime Control and Public Safety
Patty Norris	Dept of Environment and Natural Resources
Bill Stockard	Office of State Budget and Management
Brenda Warburton	Office of State Personnel
Debbie Watkins	Administrative Office of the Courts
Vicky Williford	Dept of Correction
Mike Zeinstra	Dept of Health and Human Services



Who will have access to reports?

- Security is based on having a specific ERP role and having access to the Time tab
- In BI reports, a user has access to the top org unit in the associated ERP role and to all other org units that flow down from that point

BI Report Group/Name		ERP Security Role
VSL	B0211 VSL Eligibility B0212 VSL Donations By Receiver B0214 VSL Donations by Donor	Leave Admin or Master Data Maint.
CATS	B0208 Late Approvals B0209 Late Timesheets	Display Time or Display Payroll
Aging	B0202 Comp Time Aging	Display Time or Display Payroll
Quota	B0201 Quota Balances with Estimated Costs	Display Payroll
Quota	B0203 Time Overview by Employee B0204 Total Time Exceptions (CATS vs. 2001/2002) B0205 Time Leveling Exceptions B0206 Holiday Activity B0207 Time Entry Other Than 9300 on Specified Holiday	Display Time or Display Payroll

Note: VSL security roles are still under discussion



Roll-Out Plan for Time Reports

- The new reports will be available in production to a pilot group of users on May 10
 - The pilot users are from the agencies represented in the SME list
- The pilot users will provide feedback to the project team on errors/issues and the usefulness of the reports
- At the end of August, the BI Time Project team will assess whether the new reports are of significant value to deploy to additional users and a deployment timeframe will be created
- **Training on the new reports will be through a webinar presentation and assumes the user is already familiar with BI report functions**



New Reports Tab and Menu

Home | My Data (ESS) | My Staff (MSS) | SAP GUI | **Reports** | My Documents

Welcome | Personnel Admin | Organization Mgmt | Benefits | Cost Center | **Time** | PMIS Data | Agency Metrics

Detailed Navigation

- ▼ VSL
 - B0211: VSL Eligibility
 - B0212: VSL Donations by Receiver
 - B0214: VSL Donations by Donor
- ▼ CATS
 - B0208: Late Approvals
 - B0209: Late Timesheets
- ▼ Compensation Aging
 - B0202: Comp Time Aging
- ▼ Quota
 - B0201: Quota Balances with Estimated Cost
 - B0203: Time Overview by Employee & ZTCSSO_CALDAY&
 - B0204: Total Timesheet Exceptions (CATS vs. 2001/2002)
 - B0205: Time Leveling Exceptions
 - B0206: Holiday Activity & ZTCSSO_CALDAY&
 - B0207: Time Entry Other Than 9300 On Specified Holiday



Today

There are 12 T

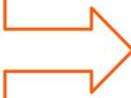


B0201 Quota Balances with Estimated Cost

Display includes quota types: Vacation, Sick, Overtime Comp, Gap Hours Comp, Holiday Comp, and Bonus. All other quotas are available by adjusting the report filter.

Organizational Unit		Employee Name	EE Nbr	Calendar Day: 09/30/2009				Overall Result	
				Quota/Att&Abs Type: 10 : Vacation Leave		15 : Sick Leave		Ending Balance	Estimated Cost
				Ending Balance	Estimated Cost	Ending Balance	Estimated Cost	Ending Balance	Estimated Cost
20000015	OSP Director's Office	COLUMB, LINDA	3092	154.53	8,942.65	72.00	4,166.64	226.53	13,109.29
		HORNER, JAMES	3091	7.83	271.07	8.00	276.96	15.83	548.03
		MELTON, ALFREDA	3097	387.03	8,437.25	1,311.79	28,597.02	1,698.82	37,034.27
		SLIVER, ROSS	1408	293.31	16,079.25	1,077.74	59,081.71	1,371.05	75,160.96

Estimated Cost is based on a calculated hourly rate. For a FT employee, the rate is the annual salary / 2080.



- Free characteristics
 - Age Range
 - Cal Mth/Yr
 - EE Hrly Rate
 - EE Hrs Per Wk
 - Employee Group
 - Employee Subgroup
 - Employment Status
 - Job
 - Mths of Svc
 - Personnel Area
 - Personnel Subarea

- Position
- Position County
- Supervising Employee
- Supervising Position
- Time Mgmt Status
- Time Type Group
- Working Week
- Work Schedule Rule



B0202 Comp Time Aging

Employee Name ⇅	EE Nbr ⇅	Cal Mth/Yr	Quota Type ⇅	Overall Result	APR 2010	MAY 2010	JUN 2010	JUL 2010
				Remaining Hours ⇅	Remaining Hours	Remaining Hours	Remaining Hours	Remaining
XXXXXXXX	XXXX		OT Compensatory Time	45.00	0.00	37.00		
XXXXXXXX	XXXX		OT Compensatory Time	54.50	4.00	7.00	4.25	
XXXXXXXX	XXXX		OT Compensatory Time	9.00	0.00	6.00		
XXXXXXXX	XXXX		OT Compensatory Time	21.50				

- Free characteristics
 - Age-out Date
 - EE Hrs Per Wk
 - Employee Group
 - Employee Subgroup
 - Employment Status
 - Job
 - Liability Flag
 - Organizational Unit
 - Position
 - Processed Date
 - Supv Employee
 - Work Schedule Rule

Drag on Age-out Date to see the specific expiration date

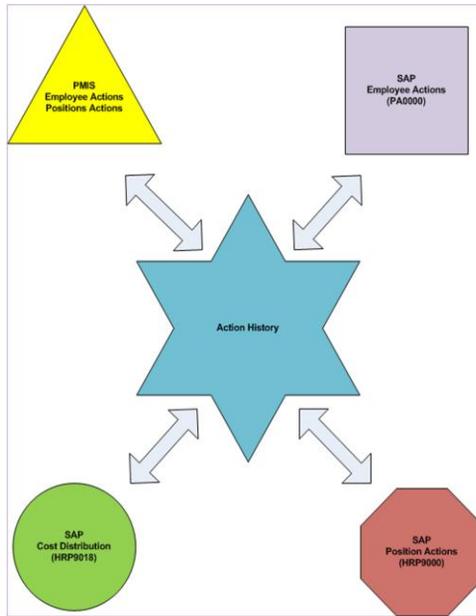
- Blank cell means no comp time is set to expire for this period
- 0 value means comp time set to expire this period was used



Data Migration Summary

- Phased Approach
- Action History's delivered in May
- Headcount is scheduled for Release 2 – 2010
- Two additional initiatives are in scope
- Will need active Agency participation in UAT
- Main objective is to “Sunset” PMIS.

Action History Conceptual Diagram



Employee Action History

Valid From	Action Type	BI EE and Pos Action	Employee
07/01/2008	EE Action	ZC22	Legislative Increase
12/31/2007	PHIS Action	489	SEPARATION - CONVERT TO BEACON
12/01/2007	EE Action	ZV01	POSITION ASSIGNMENT-Active
07/01/2007	PHIS Action	100	LEGISLATIVE INCREASE-AUTO UPDATE
07/01/2008	PHIS Action	016	POSITION & EMPLOY/EE TRANSFER FRM
		042	APPOINTMENT CHANGE

Position Action History

Valid From	Action Type	BI EE and Pos Action	Employee
07/01/2008	EE Action	ZC22	Legislative Increase
	Fund Action	0112	Legislative Increase for Position
12/31/2007	PHIS Action	489	SEPARATION - CONVERT TO BEACON
12/01/2007	EE Action	ZV01	POSITION ASSIGNMENT-Active
07/01/2007	Fund Action	0200	Conversion Purpose for Technical
	PHIS Action	100	LEGISLATIVE INCREASE-AUTO UPDATE
07/01/2008	PHIS Action	016	POSITION & EMPLOY/EE TRANSFER FRM
		042	APPOINTMENT CHANGE



DM Action History Project Timeline

This schedule is tentative and may change slightly depending on resource availability.

Action History Detail:

- March 29 –April 23 Development
- April 26 – April 30 Functional Testing
- May 4 User Acceptance Testing
- May 18 User Acceptance Testing
(only if necessary)
- May 20 – May 26 Training (via Conference Call)
- May 27 Promote to production
- May 28 Available for Use



Employee Action History Report

- Employee action history will retrieve both SAP and PMIS data

- Accessed by Employee **Last Name** and **Last 4 SSN**

- Source system source identifier (PMIS, SAP)

- Report will pull from the following source repositories:
 - SAP Employee Actions

 - PMIS Employee Actions



Position Action History Report

- Position History will retrieve both SAP and PMIS data
- Accessed by SAP position number
- Additional report will be provided to lookup the SAP position number and “Jump To” the position history report
- Source system source identifier (PMIS, SAP, Fund)
- Report will contain records from the following data entities:
 - SAP Position Actions
 - SAP Employee Actions
 - PMIS Position Actions
 - PMIS Employee Actions
 - SAP Position Funding

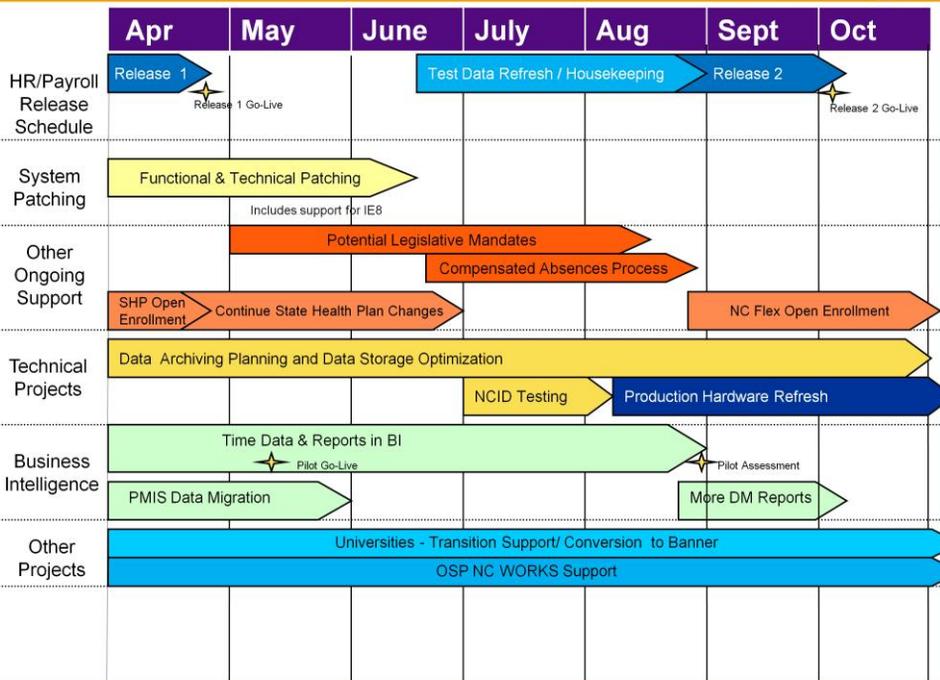


Release 2, 2010 Plan

Coming Attractions this Fall

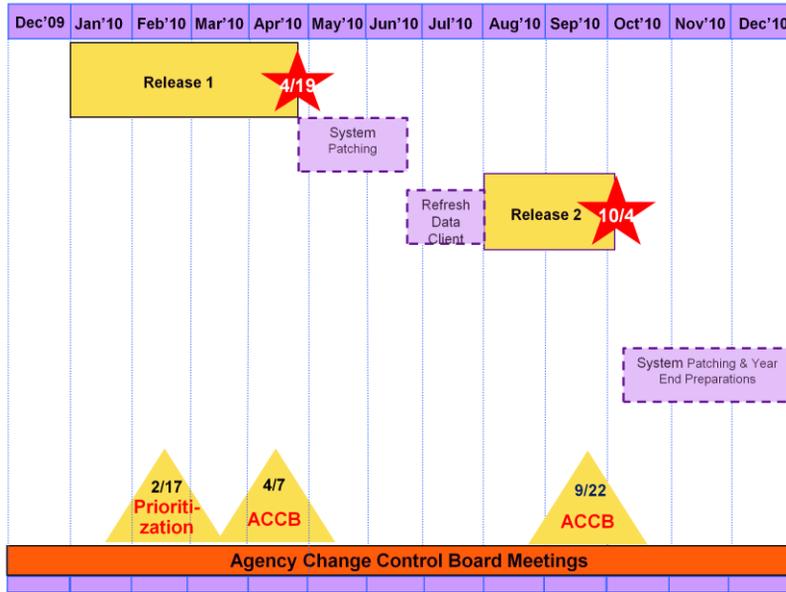
Upcoming Projects – 7 Month Plan

04/07/2010





Planned Releases for 2010



NOTE:

There will be instances where bug fixes, or enhancements will go in the system on dates other than the release dates; we'll take these on a case by case basis.



Release 2 – BI

Type	Deliverable	Notes																																																		
*E	Modify Turnover Report	Request to change the default of the output from quarterly and monthly, to reporting the final results for a requested timeframe																																																		
<p>B0042: Employee Turnover with Transfers History Back Forward</p> <p>Save As... Display As Table Information Print Version Export to Excel Filter Settings</p> <table border="1"> <thead> <tr> <th colspan="2">Columns</th> <th colspan="2">Cal. Qtr/Yr</th> <th colspan="2">4/2009</th> <th colspan="2"></th> <th colspan="2"></th> </tr> <tr> <th>Org Unit</th> <th>State of North Carolina</th> <th>Cal Mth/Yr</th> <th>Voluntary Separations</th> <th>Vol Separation Rate %</th> <th>Total Turnover</th> <th>Total Turnover Rate %</th> <th>Number of Employees</th> <th colspan="2"></th> </tr> </thead> <tbody> <tr> <td>20000000</td> <td>State of North Carolina</td> <td>October 2009</td> <td>476</td> <td>0.616</td> <td>894</td> <td>1.160</td> <td>77,037</td> <td colspan="2"></td> </tr> <tr> <td></td> <td></td> <td>November 2009</td> <td>357</td> <td>0.464</td> <td>646</td> <td>0.840</td> <td>76,921</td> <td colspan="2"></td> </tr> <tr> <td></td> <td></td> <td>December 2009</td> <td>381</td> <td>0.496</td> <td>679</td> <td>0.883</td> <td>76,862</td> <td colspan="2"></td> </tr> </tbody> </table>			Columns		Cal. Qtr/Yr		4/2009						Org Unit	State of North Carolina	Cal Mth/Yr	Voluntary Separations	Vol Separation Rate %	Total Turnover	Total Turnover Rate %	Number of Employees			20000000	State of North Carolina	October 2009	476	0.616	894	1.160	77,037					November 2009	357	0.464	646	0.840	76,921					December 2009	381	0.496	679	0.883	76,862		
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*E	Add DOB for B0095-1: Employees by Personnel Area and B0037: Employee Personnel Data	Approved by OSP																																																		
*E	Add "age" but also keep age range on B0033:Emps in Graded & Non-Graded Classifications and B0035: EEO General Demographics	Approved by OSP																																																		

38

* Agency Request Submitted through CCB

BF = Break Fix E = Enhancement N = New Functionality



Release 2 – BN, OM

Type	Deliverable	Notes
E	NC Flex Annual Enrollment Changes	
N	Workflow Validations based on Infotype status	System will stop new workflow from being created if there is an existing one already in process for the same position; Will prevent PCR's from getting "stuck" in the system

39

*** Agency Request Submitted through CCB**

BF = Break Fix E = Enhancement N = New Functionality



Release 2 – PA, PY, Time

Type	Deliverable	Notes
N	PA Workflow Reminder Message to complete other steps (PA30/PA40)	
*N	ITS interface - Employee Email Directory	
*N	DOA parking interface -Phase 2	Will provide additional extract files
*N	Add warning message when changing CATS record tied to an FMLA Event	
*N	Create mechanism to prevent changes to CAT2 records prior to a specified date	Similar to the creation of the "payroll wall"

40

* Agency Request Submitted through CCB

BF = Break Fix E = Enhancement N = New Functionality



Questions?