OSC TRAINING

OM210

Organizational Management for Agencies

TRAINING COURSE

State of North Carolina

Office of the State Controller

December 29, 2015

For assistance with any TRAINING needs, contact:

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Introduction

Overview

Welcome to the OSC HR/Payroll *Organizational Management (OM) for Agencies* training course. This course is for those individuals working at State agencies who process position actions. In this course you are going to learn how to enter required data and how to initiate the approval process for a position action.

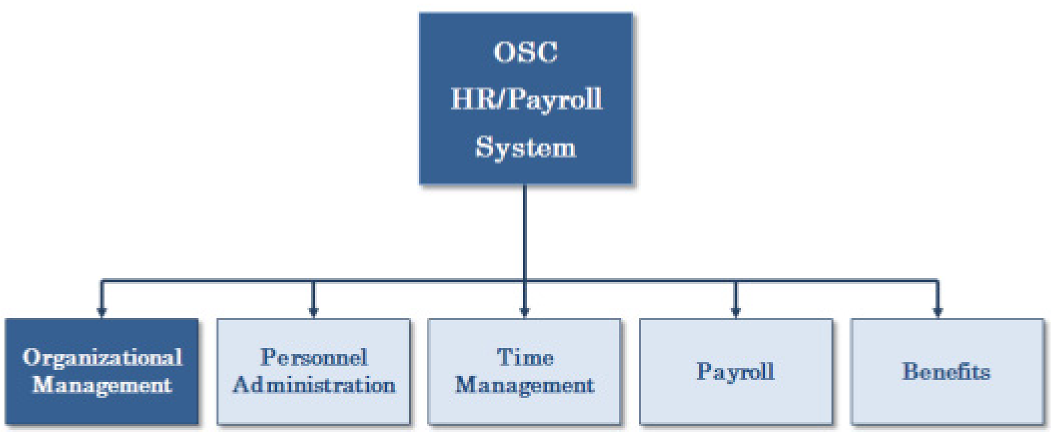
NOTE: OM is the acronym for Organizational Management.

Pre-requisites

- OM200 - Organizational Management Overview

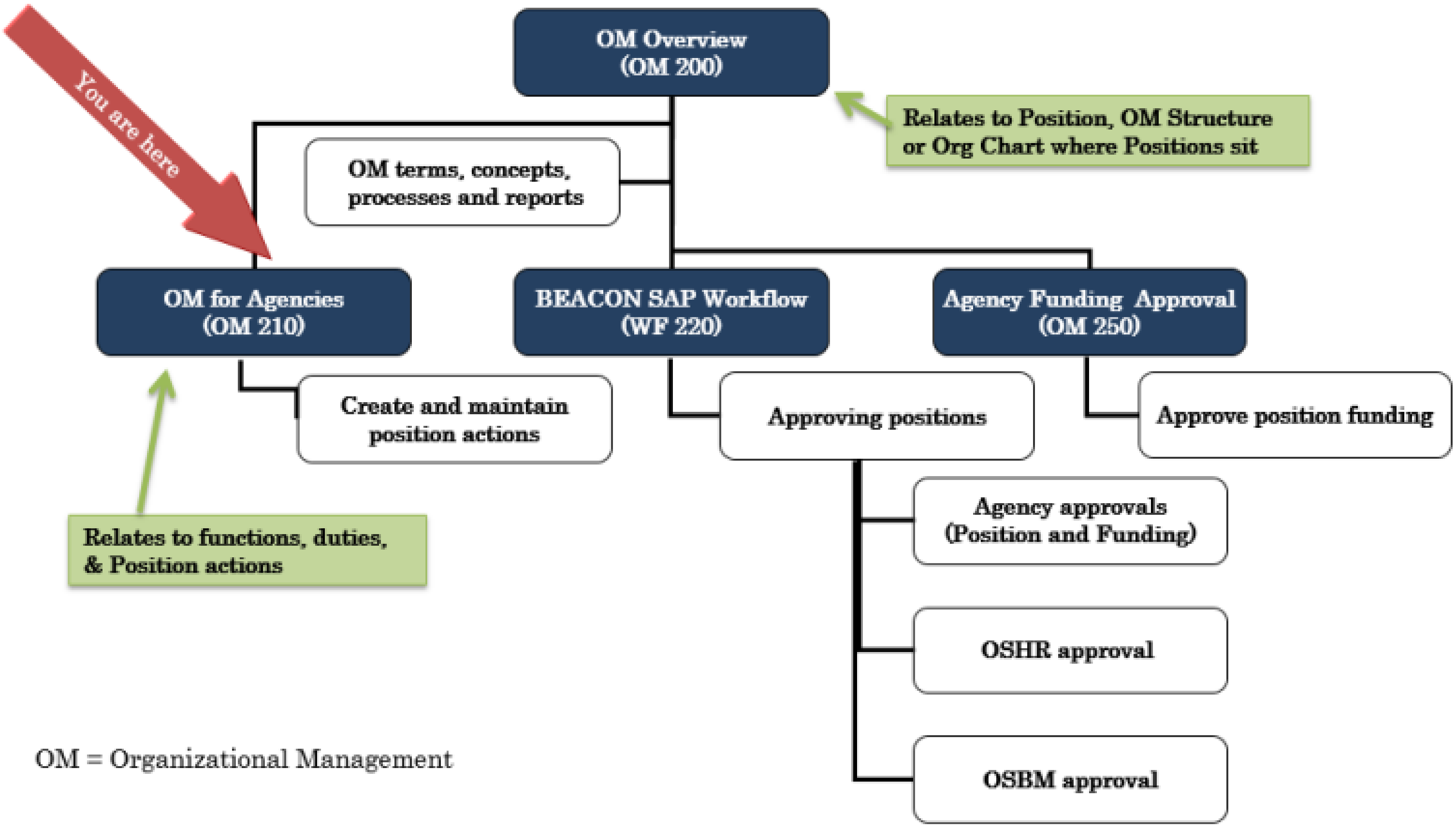
OM200 is the prerequisite that you must take before attending this class. Attending this prerequisite ensures that you are adequately prepared to learn the new processes, concepts and data entry skills that are covered in this course.

OSC HR/Payroll Training Curriculum



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

OM Curriculum by Security Role



Within the OM curriculum, there are several courses. Everyone attends the first course, *OM200 OM Overview*. Your position determines which additional courses you may be required to attend.

Strategy for Training

<u>Tell Me (Concepts)</u>

- Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

<u>Show Me (Demonstrations)</u>

- Instructor will demonstrate job-related tasks performed in the OSC HR/Payroll system – HANDS OFF.

<u>Let Me (Exercises)</u>

- Student will complete the exercises which allows for hands-on practice in class – HANDS ON

<u>Support Me (Availability)</u>

- Instructor will be available to answer questions while the students complete the exercises

Course Map

You can see the Course Map of the class at the beginning of each lesson. The bolded and larger text indicates which lesson you are beginning.

The lessons covered in this class include:

- Lesson 1: OM Position Concepts
- Lesson 2: Position Creation
- Lesson 3: Display Position Infotypes Using Infotype Reporting
- Lesson 4: Position Reallocation
- Lesson 5: Other Position Actions
- Lesson 6: OM Workflow Process & Inquiry
- Lesson 7: Job Information
- Lesson 8: Course Review

The *Organizational Management Overview* Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the HR/Payroll system training environment.

You may also find it useful to take the Employee Self-Service and Manager Self-Service courses although they are not required for the PA curriculum. They are, however, mandatory for other requirements.

Course Objectives

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

- Perform position actions using the *Position Action* transaction, *ZOMA069.*
- Display position actions using the *Display Position* transaction, *PO13D.*
- Display position data in planned status using the Display *Position* transaction, *PO13D.*
- Search for the status of a position action using the *Display Position* transaction, *PO13D.*
- Explain the OM Workflow process
- Display Workflow information using the *Workflow Monitoring* report transaction, *ZOMWFMON* and the *OM Workflow Process Monitoring* report transaction, *ZOM0178.*

Reference Materials

- Student Guide
- OSC Training HELP website
  - Job Aids
  - Work instructions - Business Process Procedures (BPPs)
  - Support Material Updates - *"What's New"*
- Other Resources
  - Online help - from the SAP portal

SUMMARY

This course is intended to give HR professionals an understanding of the HR/Payroll system Organizational Management module. This course will provide you with demonstration and practice for creating and modifying positions.

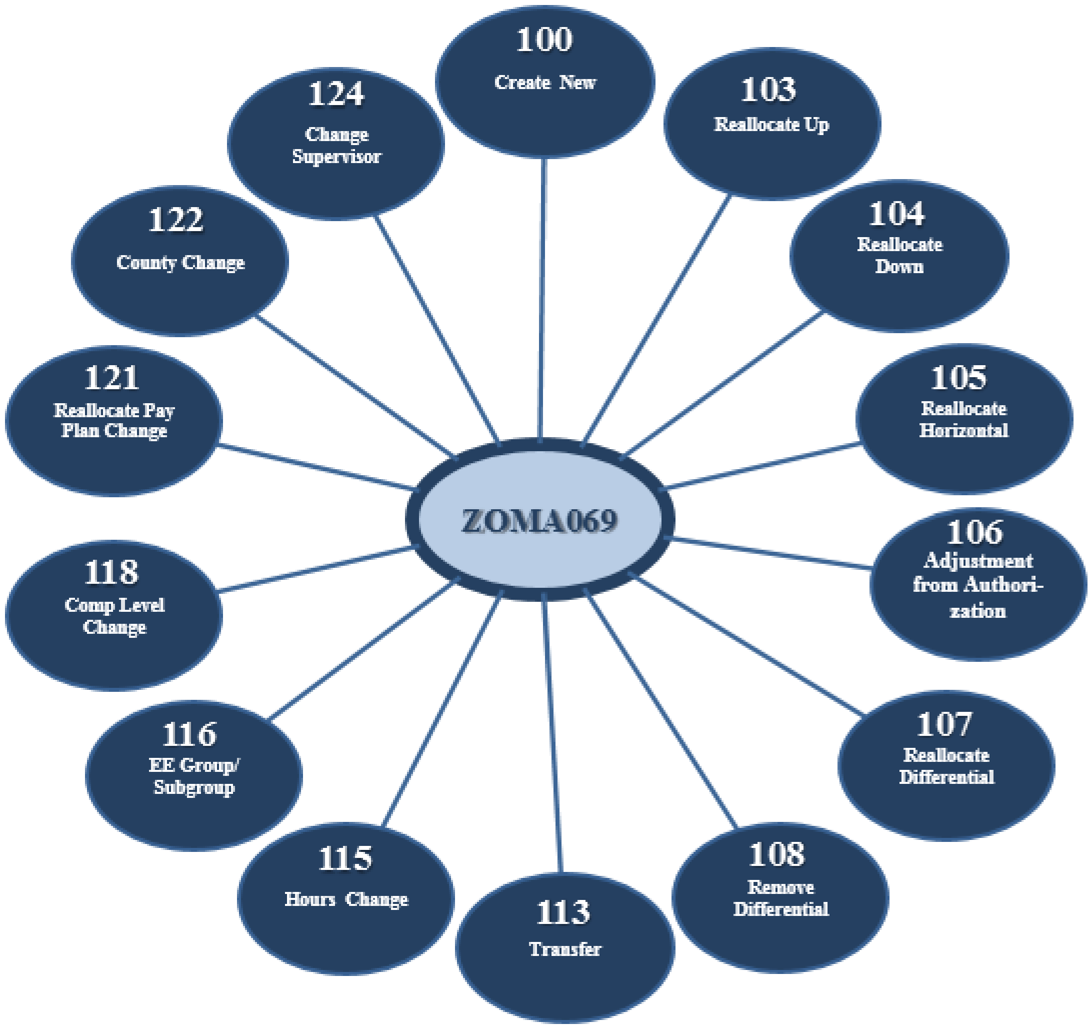
OM Position Concepts

Lesson 1 Objectives

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

- Define the various position actions
- Describe the position Workflow process at a high level
- Explain the importance of the validity period associated with an action
- Explain the naming and data entry conventions for positions
- Describe the interdependencies between position information and other system functions such as Personnel Administration, Payroll, Benefits and Time
- Describe the position types

Position Actions



Thirteen actions have been developed for creating and maintaining positions. These actions are accessed using the Position Action transaction, ZOMA069 or using transaction PO13. Additional information and an example of how each action is used can be found in the *Position Actions Descriptions* reference job aid that is available on the OSC Training HELP website. (Go to the *OM > Job Aids* folder.)

NOTE: The three-digit number above the abbreviated action title represents the position action code.

The following actions will be taught in this class:

<u>ZOMA069</u>

- 100 Create New Position
- 103 Reallocate Position Up
- 104 Reallocation Position Down
- 113 Position Transfer
- 116 Position Employee Group/Subgroup Change
- 122 Position County Change

<u>PO13</u>

- (PO13) Position Working Title Change

Position Creation Workflow

🗁 **NOTE**: All OM position actions entered through the ZOMA069 transaction are initiated in Workflow.

Roles involved in position actions:

- Agency HR Personnel Analyst researches the action with the appropriate manager.
- Agency HR data entry/personnel analyst uses the ZOMA069 transaction to enter the required position data in planned status, and then initiates Workflow approvals.
- Agency Salary Control Officer (Agency Position Funding Approver) approves the action after entering the cost distribution and position salary or rejects the action.
- Agency position approver approves or rejects the position action.
- Division HR Administration position approver approves or rejects the position action.
- The OSBM (Office of State Budget and Management) Position Funding HR approves or rejects the position action.
- The Office of State Human Resources (OSHR) Position approver approves or rejects position action if sent to OSHR by the agency.
- Upon final approval, the action is changed to active in the HR/Payroll system by BEST Shared Services.

🗁 **NOTE**: The system automatically sends a record of the action to the Salary Control System for necessary updates and reporting.

🗁 **NOTE**: If an agency does not have delegated authority for the action being processed, the approver must click the decision step to send the request to OSHR. This is not an automatic action.

Once BEST Shared Services makes a position active, you can see it on PPOSE.

🗁 **NOTE**: The required agency approval levels for each action mirror the legacy process. However, the Create New Position action does require the funding approval from OSBM (Office of State Budget and Management).

🗁 **NOTE**: If the PCR is canceled, the Workflow still comes to BEST Shared Services for approval.

Position Validity Date Rules

When creating a position, the validity date must be equal to, or prior to the date the employee is assigned to the position.

Criticality of Validity Dates

Every OM Action must have a beginning (effective) and ending date. The beginning date default is the current date. Therefore, you must be especially diligent about entering the correct beginning date when performing an action. The system automatically assigns an end date as 12/31/9999 to denote the end of time. 12/31/9999 is often referred to as "high date."

Example 1: You have 15 new customer service representatives starting their employment on 2/1/2013. You will be filling 11 current positions, and creating four new positions. You can create them earlier in January and make the effective date match the date you create the position, or you can use 2/1/2013. Even if you don't create the position until after 2/1/2013, you still must have the position validity (begin) date no later than the date you create the position. (This would be a retroactive action. Retroactive actions are questioned by the BEST Shared Services team before processing.)

🗁 **NOTE**: The effective date should be current or future dated unless there is a specific reason to go retroactive, i.e., legislative mandate. Be aware that BI has problems with retroactive actions.

Example 2: The Chemist II position is reallocated up to Chemist III effective March 1, 2013. The validity (begin) date of the position reallocation would be March 1, 2013.

Position Naming Conventions

Apply your agency's data standards when naming positions.

- Short description: up to 12 characters
- Long description: Up to 40 characters and is known as the position title

  🗁 **NOTE**: Position title (long description) will be displayed in reports.

The position name should be more descriptive than the job name. For example, a Personnel Analyst II job may contain a Compensation Specialist position.

Enter the position Long Description in Title case (mixed case with captious at beginning of each word).

🗁 **NOTE**: The system assigns a unique eight-digit (non-intelligent) ID number to a new position. Positions begin with 60 or 65. Those that begin with **60**, are positions brought over at Go-Live. Positions beginning with **65** have been established since Go-Live.

Position Information

Position Interdependencies

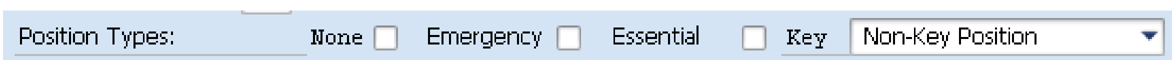
- Determines how overtime, holiday, and premium pay is calculated and paid out
- Determines the benefits that are offered to an employee
- Defines the payroll area (pay cycle) for an employee
- Defines the organizational structure and reporting relationships at the State and Agency levels
- Defines planned compensation for banded jobs (classes)
- Inherits planned compensation for graded jobs (classes)
- Defines the county (the physical location most times)
- Defines the courier, main, and mailing address for the position
- Defines time management settings

Best Practice Recommendations

Before creating a position we recommend that you have your agency's completed Position Change Request form noting the following:

- The Org Unit to which this position will belong
- The Job (class) that describes the position
- Competency level, if position is Career Banded
- The position number of the supervisor (Reports to field)
- The Employee Group, Employee Subgroup, Personnel area, and Personnel subarea for the position
- The County in which the position is located (most times)
- The courier, main, and mailing addresses for the position
- The position type (Emergency, Essential, Key, and None)
- Any time management settings

Position Types



The State has three separate designations for critical positions which are defined by OSHR as follows:

- **Emergency Position**: A position designated by an agency that is mandatory/essential to agency operations during adverse weather or other conditions of a serious nature that prohibit some employees from reporting to work but do not necessitate the closing of state offices and facilities; or a position designated that is mandatory/essential during emergency conditions that necessitate the closing of state offices or curtailing of operations. These designations are related only to the "Adverse Weather and Emergency Closing" policy in the State Human Resources Manual.
- **Essential Position**: A position designated by an Executive Branch Department Head with the approval of the Office of State Budget and Management, as exempt from an Executive Order prohibiting the filling of positions. Essential positions include positions directly related to law enforcement and public safety, classroom instruction, and the custody or care of persons for whom the state has a constitutional duty to serve. Administrative and support positions are not deemed essential, but the Office of State Budget and Management may designate additional positions as an Essential Position depending upon the circumstances of each request.
- **Key Position**: A position that requires specialized knowledge that is unique within the organization. The specialized knowledge is essential for the organization to meet the goals and objectives that are linked to its mission or statutory requirements. The loss of an employee in a key position would lead to immediate difficulties in getting the work accomplished.

A position can be designed with more than one type. If no types are applicable, select *None*.

KNOWLEDGE CHECK

True	False	Question
		1. A position can be designated with more than one position type.
		2. All OM positions actions entered in the ZOMA069 transaction must be initiated in Workflow.
		3. Position names and addresses should be entered in the HR/Payroll system in upper case type.
		4. Position information determines how overtime, holiday, and premium pay are calculated and paid out.
		5. When creating a position, the validity date must be equal to, or prior to the date the employee is assigned to the position.

SUMMARY

In this lesson you learned to:

- Define the various position actions
- Describe at a high level the position Workflow process
- Explain the importance of the validity period associated with an action
- Explain the naming and data entry conventions for positions
- Describe the interdependencies between position information and other system functions such as Personnel Administration, Payroll, Benefits and Time
- Describe the position types

Position Creation

Lesson 2 Objectives

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

- Upon completion of this lesson, you should be able to create new positions using the *Position Actions* transaction code, ZOMA069.

Actions You Will Perform in this Lesson

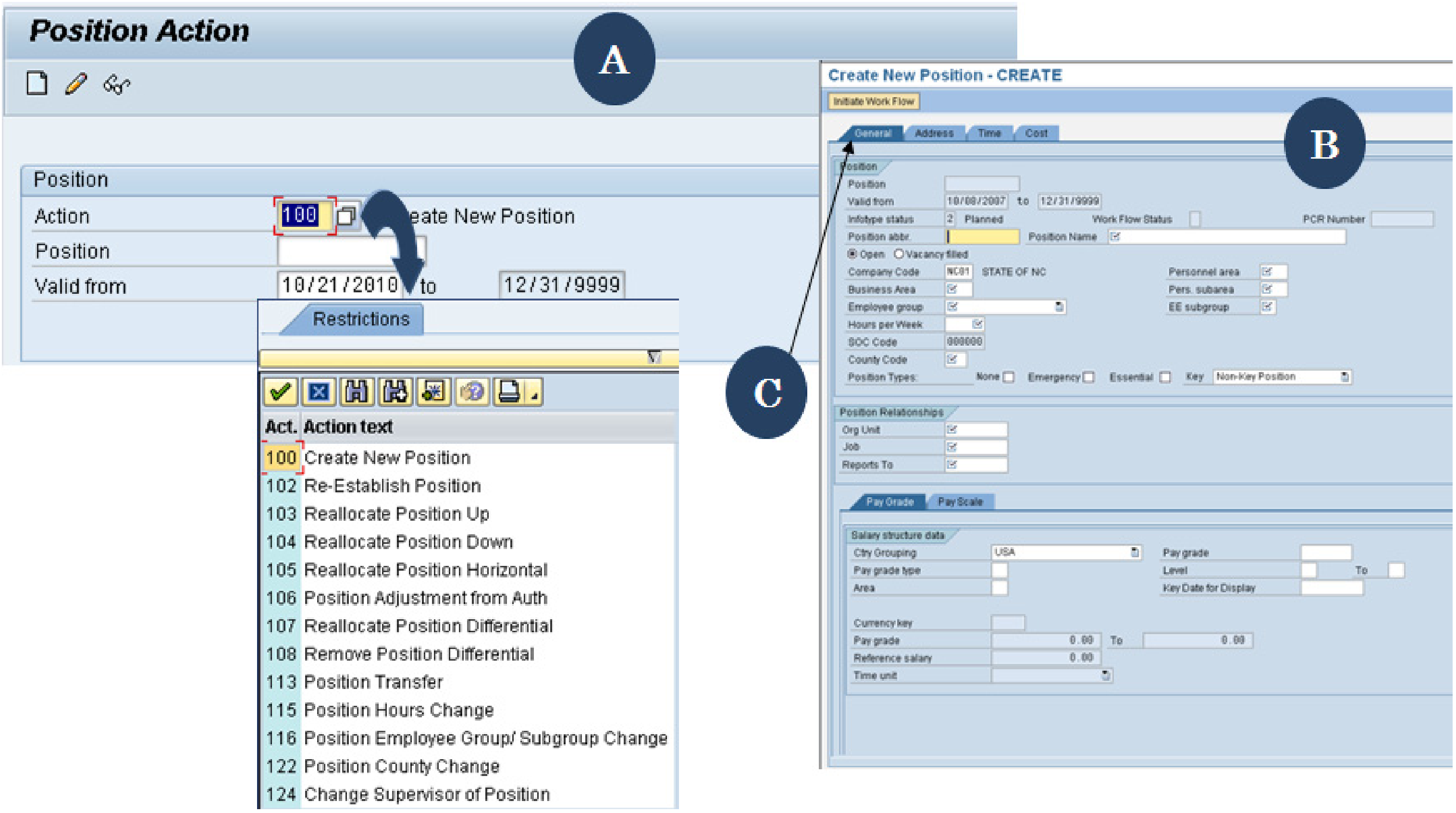
- Create a Building Technician, full-time banded position assigned to Cultural Resources
- Create a Market Promotions Assistant, part-time graded position assigned to the Department of Agriculture
- Create a Paralegal, part-time banded position assigned to the Legal Division of Justice
- Changing a position before initiating Workflow

Assignment of SOC Codes

The **Standard Occupational Classification (SOC)** code is an occupational classification used by the U.S. Department of Labor. OSHR also uses SOC codes for EEO reporting.

- The OSC HR/Payroll system automatically assigns the SOC code for actions that involve **graded** positions.
- It is the responsibility of each agency/university to assign the SOC codes when creating a new **banded** position. The initiator will be prompted by the system to select the SOC code from an established list when creating a new banded position or when changing a banded position prior to initiating Workflow. The agency personnel analyst is responsible for identifying the SOC code to be used.

ZOMA069 - Position Actions

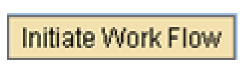


ZOMA069 process steps

A. The first step in performing a position action is to use the ZOMA069 transaction code to access the Position Action screen.

B. On the initial Position Action screen, you will enter the Action that you want to perform and then choose either the create, change, or display mode. The screen refreshes and displays tabs that contain the required new field values for the action you are processing.

C. After you complete the data entry, you will initiate Workflow. The system automatically sends the request to the appropriate approvers. There may be more than one level of approval in the process. Any approver that is part of the process can approve or reject the request. If the request is rejected, it will be sent back to the initiator.



NOTE: During this training class you will initiate the Workflow for the actions that you create. If you are an approver, you will need to take the WF220 - SAP Workflow for Approvers course. You will learn how to navigate the Approver's Inbox and approve/take action on PCRs.

Workflow

All position actions entered through the ZOMA069 transaction need approval before the action can be executed. Workflow enables approvals (or rejections) to be obtained electronically. In your agency, you may already have a manual process in place. Workflow does not eliminate that process entirely, however, Workflow may duplicate a portion of your manual process (unless you change your process accordingly).

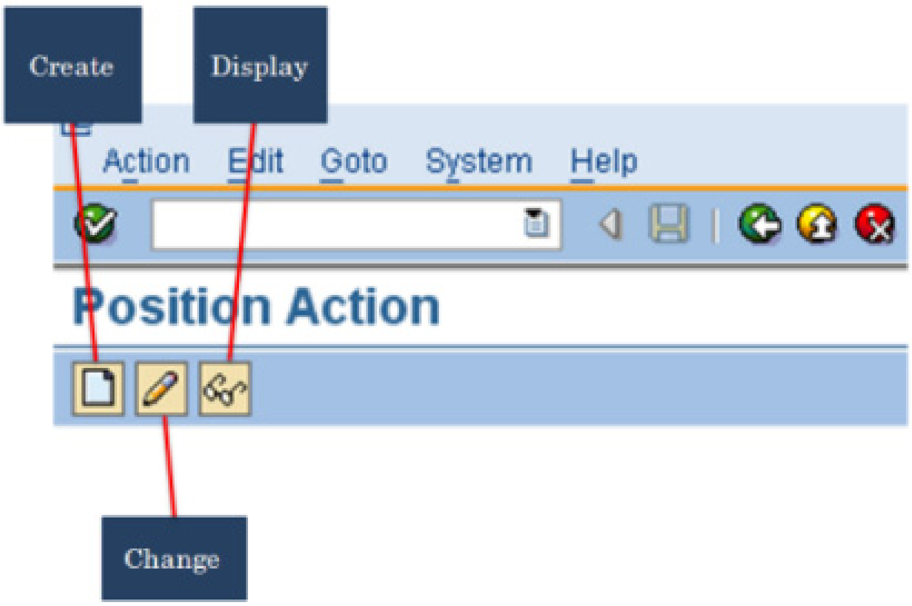
PCR Number

Once you initiate Workflow for a position action, the system generates a **PCR (Position Change Request)** number.

The PCR number is used by the system to track the status of the position action.

You can use these numbers to make it easier to track your items in workflow.

ZOMA069 Processing Modes



There are several processing modes to process a position action using the ZOMA069 transaction as listed below:

- **Create**: Create a new action.
- **Change**: Before you initiate Workflow, you can add additional information or correct an error which overwrites previous entry. After initiating Workflow, the effective dates CANNOT be changed. The PCR must be canceled all the way through BEST HR and then a new PCR must be created with the correct effective date.
- **Display**: View an individual position action.

In this lesson, you will learn how to use each processing mode.

* *

EXERCISE 2.1: Logging on to the HR/Payroll System

SCENARIO
You need to log on the HR/Payroll training client so that you can complete course exercises. You also need to add the transactions you will use in class to your Favorites folder.

Instructions

Use the steps and data presented below to log into the training client in the classroom.

1. Access the HR/Payroll portal web page.
   - https://trg-mybeacon.its.state.nc.us
2. Enter the **User ID** and **password** that is assigned to your classroom PC.
3. Click on the **Log on button**.
4. Click **Yes** to confirm the security message displayed.
5. Click the **SAP GUI** tab.
6. Click the **training client** specified by your instructor. The SAP Easy Access screen is displayed.
7. Maximize your screen by clicking on the **Min/Max** icon in the upper right hand corner of the screen.
8. Right-click on the **Favorites** folder in the directory on the left hand side of the screen.
9. Select **Insert Transaction** from the drop-down list. A dialog box is displayed.
10. Type **ZOMA069** in the Transaction Code field and click the green check mark or press the Enter key to process your request. The Position Actions transaction short cut is now visible in your Favorites folder.
11. Repeat steps 9-10 to add the following transactions to your Favorites folder:
    - **PO13** – Maintain Position
    - **PO13D** – Display Position
    - **PPOSE** – Display Organizational Structure
    - **ZOMWFMON** - OM Workflow Process Monitoring
    - **ZOM0178** - Workflow Monitoring Report
12. To display the transaction codes in the menu structure, select the **Extras > Settings > Display technical names** menu option.

You can also add a bookmark to a web page (URL).

13. Copy the web address as indicated by your instructor for the OSC Training HELP page.
14. Right-click on **Favorites**.
15. Select **Add other objects** from the list. A drop-down list is displayed.
16. Click **Web address or file** from the list. A pop-up box dialog displays.
17. Enter a title for your web page in the **Text** field.
18. Paste the web address you copied in step 17 for the OSC Training HELP page in the **Web Address or File field**.
19. Click the **Continue** button at the bottom right-hand corner of the box.

20. The URL has been added to the SAP Favorites folder. Click the **URL** to access the website you just added.

* *

EXERCISE 2.2: Create a New Full-time Banded Position

SCENARIO

The Western office of the History Department of Cultural Resources has requested more building and environmental technicians. The new position will be:

- Available the first day of the next calendar quarter
- Permanent, full-time banded position at the Journey level working forty hours per week
- Subject to FLSA overtime

In this exercise, you will create a full-time banded Building Tech position (Journey level) assigned to Cultural Resources. The position is described by the Building & Environmental Technician job. Therefore, the position will inherit the field values for planned compensation and the job schematic code.

As you progress through each tab (screen), observe the field names and definitions on the individual tabs so that you can become familiar with the various types of information required to create a banded position. For more information, the *Glossary of OM Fields* job aid is available on the OSC Training HELP website in the OM > Job Aid folder.

NOTE: Although you see the Cost tab, you will not be able to access this screen. The cost tab will be completed by agency funding approvers and the Office of State Budget and Management.

Instructions

Use the steps and data presented below to create the full-time banded position. Also, if required, refer to the ***OM Field glossary*** job aid for the complete definitions of the data fields that are on the Create New Position action screens.

NOTE: Use the Tab key rather than the Enter key to move through the fields on this screen.

1. Enter transaction code **ZOMA069,** for Position Actions, in the **Command** field and then click **Enter** to display the initial screen for the transaction.
2. Type or select **100**, for Create New Position, in the Action field.
3. Click **Enter** to continue. The screen is refreshed to display additional fields.

4. Type or select the **effective start date** of the position action in the Valid from field in the mm/dd/yyyy format. For this exercise, the position is effective on the first day of the next calendar quarter.

5. Observe that 12/31/9999 is the default in the Valid to field.

6. Click the **Create.** button. The Create New Position – CREATE screen displays with the General tab active.

7. Complete the following fields on the General tab:

Field	Value
Position	
Position abbr.	**BldgTech** (Use agency required naming convention.)
Position Name	**Building Technician_XX** where XX is your initials. (You will only use the initials in the training class…not at your workplace.)

8. Accept the default selection of the Open radio button to indicate that the position is not filled by an employee.

9. Complete the following fields on the General tab:

Field	Value
Position (continued)	
Company Code	**NC01** (**NOTE:** The State of North Carolina uses two company codes: NC01 and NC02. All agencies, except Transportation and Employment Security Commission, use NC01.)
Personnel Area	**4601** for Cultural Resources
Business Area	**4600** for Cultural Resources
Pers. Subarea	**NC01** for 7-day normal calendar
Employee Group	**SPA Employees**
EE Subgroup	**B1** for Full-time, Subject to FLSA overtime, permanent **NOTE:** Using the matchcode on this field may take several minutes, depending on system performance.
Hours per week	**40**
County Code	**011**
Position Types	**None**
Position Relationships	
Org Unit	**20010236** (for CR CDS A&H HIS RES Western Office
Job	**30005055** for Bldg & Environmental
Reports To	**60083644** for Archives & History Regional Supervisor

SOC Code	**372010** (You must press Enter to access this field.)

10. Click **Enter** to validate your data entries and to populate the Pay Grade tab.
11. On the Pay Grade tab, click the matchcode drop-down list in the Level field and select **J** for Journey.
12. Click **Enter** to validate your data entries.
13. Click **Save** to save the information entered on the General tab. The system displays the message, "Position ######## successfully created" where ######## is the 8-digit position number SAP assigned.

IMPORTANT: Write the position number that was generated by the system for your position on your Transaction Log.

NOTE: We recommend, as a best practice, that you record the position number generated by the HR/Payroll system on an appropriate business document for future inquiry in the system.

NOTE: The HR/Payroll system will hold the position number in the *Planned* status until the workflow has gone through the entire approval process. Once the workflow is approved, all of the data for the position will be moved into the *Active* status. If the workflow is rejected or canceled, the data will be moved into the Rejected status on the position. Once a position number has been assigned, BEST Shared Services can also view this position in the HR/Payroll system.

14. Click the **Address** tab to continue. The screen refreshes and displays the data fields for address information. A position can have one or more of these three address records (subtypes): courier, main, and mailing.
15. Select **Courier** in the **Subtype** field.
16. Complete the following fields on the Address tab using title case for the data entry convention:

Field	Value
House no/street	**CS# 38-14-22**
PCode/City	**28803 Asheville**
Country	**USA** (should default)
Region (State)	**NC** (should default)
Telephone number	**828-274-6789**

17. Click **Enter** to validate your data entries.

NOTE: Do Not Save between address types. This will lock the record and will require exiting the record and coming back into the record in Change (Edit) mode.

18. Select **Mailing Address** in the Subtype field.

19. Click Get Address to clear the previously displayed address.

20. Complete the following fields on the **Address** tab using title case letters for the data entry convention:

Field	Value
House no/street	**PO Box 2600**
PCode/City	**28808 Asheville**
Country	**USA** (should default)
Region (State)	**NC** (should default)
Telephone number	**828-274-6789**

21. Click **Enter** to validate your address data entry, but <u>do not</u> click Save.

22. Select **Main Address** in the Subtype field.

23. Click Get Address to clear the previously displayed address.

24. Complete the following fields on the Address tab using title case letters for the data entry convention:

Field	Value
House no/street	**2200 Village Ln Ste 303**
PCode/City	**28803 Asheville**
Country	**USA** (should default)
Region (State)	**NC** (should default)
Telephone number	**828-274-6789**
Fax number	**828-274-6995**

25. Click **Enter** to validate your data entries.

26. Click **Save** to save the main address information entered on the Address tab. The system displays the message, “Position ######## Address data successfully created,” where ######## is the 8-digit position number that was assigned by SAP.

27. Click the **Time** tab to continue. The screen refreshes and displays the data fields required for time entry and payroll calculation rules. A position can have one or more of these three fields.

Field	Value
Overtime Compensation	
Comp Aging Limit	**30 days**
Holiday Payout Period	
Comp Aging Limit	**365 Days**
Night Shift Premium	
Night Shift Prem Rate	**10%**
Holiday Premium Rate	
Holiday Premium Rate	**50%**

28. Click **Enter** to validate your data entries.

29. Click **Save** to save the data entered on the Time tab. The system displays the message, "Position ######## Time Data Successfully Created."

30. Observe that you do not enter information on the **Cost** tab. The workflow process will include the Funds Approver, who will enter the budget information on this cost tab.

The **Services for Object** list icon is located at the upper left-hand corner of your screen. It is used to add notes to notify the Office of State Human Resources (OSHR) of your action. It may also be used to attach a file or a web link (URL) to the record. You may also attach a private note as a reminder to yourself the purpose for creating the action, to document resource data used in the information gathering process for the action or for numerous other reasons you may choose to document. Only the initiator can see a private note. If you click the left side of the document, a menu tool bar is displayed. If you click the right side of the icon, only a drop-down list is displayed.

31. Click the right side of the **Services for Object** list icon to display the drop-down list and add a note to notify the Office of State Human Resources (OSHR) of your action.

32. Click **Create > Create Note** from the drop-down list. A dialog box is displayed.

33. You will be attaching notes to send to OSHR regarding the request of the new position. Add a title and some notes to the dialog box to justify the position.

34. You also have the option of attaching documents. Select **Create > Create attachment** from the drop-down list or select the right side of the icon to display the toolbar.

35. Depending on where you clicked, an import file dialog box is displayed. Select any document in the list you wish to attach and click **Open** or click **Cancel** to continue.

36. To view the note you just created, click on the **Services for Object** tool icon . The Services for Object tool bar is displayed.

37. Click on the **Attachment list** icon to view a list of Notes or Attachments that have been saved to your request.

38. Click the **green check mark** to add your comments to the Position Request.

39. Click (Save) to save the note you just added for OSHR.

40. Click Initiate Work Flow to initiate the workflow process. The system displays the message, "Workflow submitted for position: ######## PCR ID: ##########." The system also refreshes the Create New Position screen in display only mode.

NOTES:

- Once you have initiated workflow, no additional changes may be made to the position until the entire workflow approval process has been completed in either the approved or rejected status.

- If you do not initiate Workflow after you have saved the position record, you may access the Create New Position action using the Change mode. You must enter both the original validity dates and the system assigned position number.

IMPORTANT: Write the PCR ID number that was generated by the system for your work flow item on your Transaction Log.

This exercise is complete.

* *

EXERCISE 2.3: Display a Position

SCENARIO

Sally, the personnel analyst for Cultural Resources just called you to verify that the Employee Group, SPA Employees, was entered for the Building Technician position that you just created. She was concerned that she inadvertently told you to use EPA Employees.

Verify that your data entries for the Building Technician position are correct by displaying position information using the Position Action transaction (ZOMA069).

You will display the **Building Technician** position you created in Exercise 2.2.

Instructions

Use the steps and data presented below to display the Building Technician position you created in Exercise 2.2.

1. Enter transaction code **ZOMA069**, for Position Actions, in the **Command** field and then click **Enter** to display the initial screen for the transaction.
2. Type or select **100**, for Create New Position, in the **Action** field.
3. Click **Enter** to continue. The screen is refreshed and displays additional fields.
4. Refer to your Transaction log to obtain the eight-digit position number generated by the system for the Building Technician position that you created in exercise 2.2.
5. Enter that position number in the **Position number** field.
6. Type or select the effective start date of the position action in the **Valid from** field in the mm/dd/yyyy format that you entered in Exercise 2.2. The default in the **Valid to** field is 12/31/9999. <u>It cannot be changed</u>.
7. Click **Display** . The Create New Position – Display screen displays with the General tab active.
8. Verify that the **Employee Group** field value is SPA Employees.
9. Click the **Address** tab to verify the address information for each address subtype entered is correct.
10. Click the **Time** tab to verify that the time management settings for the position have been correctly entered.
11. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

What do you do if you have...

Not received all of the information from the Personnel Analyst to complete the position action?

- As a best practice, we recommend that you do not perform a position action until you have all of the data requirements that you need.

Inadvertently entered the wrong information or received additional information, such as courier address for a position?

- If you have initiated Workflow, you cannot add or change data unless an approver rejects the item back to your Inbox. And, if the item is not rejected back to you, you will need to contact BEST Shared Services.

- If you have not initiated Workflow, you can use the Change processing mode in transaction code ZOMA069 to add information or to correct information. So, if you know that you are missing data or are unsure if the data you have entered is accurate, we recommend that you save your entries but not initiate Workflow.
- If the wrong information is the effective date, the PCR will have to be canceled all the way through BEST Shared Services and a new PCR must be started.

* *

EXERCISE 2.4: Create a New Part-time Graded Position

SCENARIO

The Marketing Department of the Department of Agriculture has requested a Market Promotions Assistant position be created. The personnel analyst has met with the department manager and has determined that the position:

- Will be available the first day of the next calendar quarter.
- Is a permanent, part-time position working 24 hours per week.
- Is subject to FLSA overtime.
- Is described by the graded job (class) Administrative Assistant I.
- Is not a key position and will not be required to work during adverse weather or conditions of a serious nature that prohibit some employees from reporting to work.

Instructions

Complete the following exercise scenario in the system.

NOTE: You will NOT initiate Workflow in this exercise at this time.

1. Enter transaction code **ZOMA069,** for Position Actions, in the **Command** field and then click **Enter** to display the initial screen for the transaction.
2. Type or select **100**, for Create New Position, in the **Action** field.
3. Click **Enter** to continue. The screen is refreshed and displays additional fields.
4. Type or select the effective start date of the position action in the **Valid from** field in the mm/dd/yyyy format. The position is effective on the first day of the next calendar quarter. The default in the **Valid to** field is 12/31/9999. It cannot be changed.
5. Click **Create**. The Create New Position – CREATE screen displays with the General tab active.

6. Complete the following fields on the General tab:

Field	Value
Position	
Position abbr.	**MrktPromAsst** (Use agency required naming convention.)
Position Name	**Market Promotions Assistant_XX**.

7. Accept the default selection for the **Open** radio button. This field indicates that the position is open and not held by an employee.

8. Complete these remaining fields on the General tab:

Field	Value
Position (continued)	
Company Code	**NC01**
Personnel Area	**1001** for Agriculture and Consumer Services
Business Area	**1000** for Agriculture and Consumer Services
Pers. Subarea	**7-day norm**
Employee Group	**SPA Employees**
EE Subgroup	**Y1** for PT S-FLSAOT Perm
Hours per week	**24**
SOC Code	Will be grayed out and the value is inherited from the job (436010)
County Code	**Wake**
Position Types	**None**
Position Relationships	
Org Unit	**20001359** for the Marketing Department for the State Farmer's Market of the Department of Agriculture based in Raleigh (Agr Mkt Farmers Mkt & Mnt Fair Raleigh)
Job	**30000799** for Administrative Assistant I
Reports To	**60011646** for Farmer's Market Manager II

9. Click **Enter** to validate your data entries and to populate the Pay Grade tab.

10. Click **Enter** to validate your data entries.

11. Click **Save** to save the information entered on the General tab. The system displays the message, "Position ######## was successfully created" where ######## is the 8-digit position number that was assigned by the system.

12. **IMPORTANT**: Write the position number that was generated by the HR/Payroll system for your position on your Transaction Log.

13. Click the **Address** tab to continue.

14. Select **Main Address** in the Subtype field.

15. Complete the following fields on the Address tab using title case letters for the data entry convention:

Field	Value
House no/street	**1201 Agriculture St**
PCode/City	**27603 Raleigh**
Country	**USA** (should default)
Region (State)	**NC** (should default)
Telephone number	**919-733-7125**
Fax number	**919-733-9932**

16. Click **Enter** to validate your data entries.

17. Click **Save** to save the information entered on the Address tab.

18. Click the **Time** tab to continue. The screen refreshes and displays the data fields required for time entry and payroll calculation rules. A position can have one or more of these three fields.

Field	Value
Overtime Compensation	
Comp Aging Limit	**30 Days**
Holiday Payout Period	
Comp Aging Limit	**365 Days**
Holiday Premium Rate	
Holiday Premium Rate	**50%**

19. Click **Enter** to validate your data entries.

20. Click **Save** to save the information entered on the Time tab.

21. Click the **Services for Object** list icon at the upper left-hand corner of your screen to add notes to notify the Office of State Human Resources (OSHR) of your action. Include the following:

- Name of initiator
- Date of note/comments
- PCR # and Effective date of action
- Reason for action

22. Click the **green check** mark to add your comments to the Position Request record.

    NOTE: If needed, a URL can be added to the Services for Object record.

23. Click **Save** to save the note you just created for OSHR.

24. For this exercise, <u>**do not initiate**</u> workflow.

25. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

Initiate Workflow

<u>Before</u> you initiate Workflow, you may access the Create New Position action using the Change mode to modify or add data (except the effective date).

<u>After</u> you have initiated Workflow, no additional changes may be made to the position until the entire Workflow approval process has been completed in either the approved or rejected status.

* *

EXERCISE 2.5: Change a Position Before Initiating Workflow

SCENARIO

Bob, the personnel analyst for the Department of Agriculture and Consumer Services, has emailed you the courier address for the Market Promotions Assistant position you created in Exercise 2.4. He has also asked that you verify that the Org unit and Supervisor position numbers he provided to you earlier are correct.

- Will be available the first day of the next calendar quarter.
- Is a permanent, part-time position working 24 hours per week.
- Is subject to FLSA overtime.
- Is described by the graded job (class) Administrative Assistant I.
- Is not a key position and will not be required to work during adverse weather or conditions of a serious nature that prohibit some employees from reporting to work.

Instructions

Complete the following exercise scenario in the system.

To verify Org unit and position numbers, perform these actions:

If you are in a session which you do not wish to leave to perform an inquiry, you can open a new session. After you have performed your search and obtained the information you need, you can close this newly opened session and continue processing in the original session.

1. Click **Create New Session** button to open a second session of SAP.
2. Enter transaction code **PPOSE, Organization & Staffing Display,** in the Command field and then click **Enter** to display the initial screen for the transaction.
3. Search for the Org unit by using the Object ID by performing these actions:
   - Expand the Org unit node.
   - Click **Free Search**.
   - Click the node next to **Key fields**.
   - In the Value selection column, select the **Object ID** checkbox.
   - Type the Object ID for the Org unit in the Value field. For this exercise type **20001359**.
   - Click the green check mark (Transfer hit list… not the Hit List button) to close the search window.

- If needed, click **Yes** to confirm the system performance message. The Org unit is displayed in the Selection area. For this exercise the Org unit **Agr Mkt Farmers Mkt & Mnt Fair Raleigh** is displayed.
- Double-click on the Org unit to display its structure in the Overview section.
- Click on the **One Level Up** button. Note the Org unit to which the position reports.

4. Click the **Column Configuration** button (on the far right).
5. Check **Code** and **ID**.
6. Click **Enter** to display the Organization ID and codes.
7. Verify that the IDs for the Org Unit and Chief position listed in the following table are correct.

Field	Value
Position	
Position abbr.	**20001359** for the Marketing Department for the State Farmer's Market of the Department of Agriculture & Consumer Services based in Raleigh (Agr Mkt Farmers Mkt & Mnt Fair Raleigh)
Position Name	**600116146** for Farmer's Market Manager II

8. Click **Back** to return to the SAP Easy Access screen of the current SAP session that you have open.
9. After you have written down the information you searched for, close this session. Your original session should still be open.

To change position information before you initiate workflow, perform these actions:

10. Enter transaction code **ZOMA069**, for Position Actions, in the **Command** field and then click **Enter** to display the initial screen for the transaction.
11. Type or select **100**, for Create New Position, in the **Action** field.
12. Click **Enter** to continue. The screen is refreshed and displays additional fields.
13. Refer to your Transaction log to obtain the eight-digit position number generated by the system for the Administrative Assistant I position that you created in exercise 2.4.
14. Type or select the effective start date of the position action that you performed in Exercise 2.4 which is the first day of the next calendar quarter. The default in the **Valid to** field is 12/31/9999.
15. Click **Change**. The Create New Position – Change screen displays with the General tab active.

16. Click the **Address** tab.

17. Select **Courier** in the Subtype field.

18. Click Get Address to clear the previously displayed address.

19. Complete the following fields on the Address tab using title case letters for the data entry convention:

Field	Value
House no/street	**CS# 17-27-03**
PCode/City	**27704 Durham**
Country	**USA** (should default)
Region (State)	**NC** (should default)

20. Click **Enter** to validate your data entries.

21. Review the Services for Object note you created earlier. Click the right side of the **Services for Object** list icon .

22. Click **Attachment** in the drop-down list. A dialog box displays a list of notes created for this action.

23. Double-click on any of the notes in the list to display the text of that note.

24. Close the dialog boxes when you have reviewed the note.

25. Click **Save** to save the data entered on the Address tab. The system displays the message, "Position ######## Address Data Successfully Modified".

26. Click Initiate Work Flow to initiate workflow. The system displays the message, "Workflow submitted for position: ######## PCR ID: ##########." The system also refreshes the Create New Position screen in display, read-only mode.

IMPORTANT: Write the PCR ID number that was generated by the system for your work flow item on your Transaction Log.

27. Click Back to return to the SAP Easy Access screen.

This exercise is complete.

EXERCISE 2.6: Create a New Part-time Banded Position

SCENARIO

The Chief Deputy Attorney General of the Legal Services Branch of Justice has requested that a part-time, banded Paralegal position be created. The Personnel Analyst has met with the Department Manager and has determined that the position:

- Will be available the first day of the next calendar quarter
- Belongs to the DOJ Legal Services Branch Org unit
- Is described by the Paralegal job
- The SOC code provided by the personnel analyst is 232011
- Reports to the Chief Deputy Attorney General, position number 60010462
- Is located at the main address of 301 N Wilmington, Raleigh, NC 27699
- Can be reached through the MSC 4301 courier route or at 919-716-6865
- Pay Grade level field is banded progression level - Contributing

Instructions

Complete the following exercise scenario in the system.

The following BPP is available to assist you in performing the Create a New Position action: **ZOMA069 Change New Position**.

As you enter the exercise data, observe how the SOC field becomes active after the Job field entry has been validated.

🗁 **Reminder**: Although you see the Cost tab, you will not be able to access this screen. The Cost tab will be completed by funding approvers.

1. Access the **ZOMA069**, for Position Actions, transaction and create the part-time Paralegal position using the information provided in both the scenario and the data table. You should initiate workflow once you have entered all of the data.

Field	Value
POSITION	
Position Abbr.	**Paralegal**
Position Name	**Legal Services Paralegal_XX**
Company Code	**NC01**

Personnel Area	**Justice**
Business Area	**Justice**
Pers. Subarea	**7-day Normal**
Employee Group	**SPA Employees**
EE Subgroup	Part-time subject to FLSA, permanent **(Y1)**
Hours per week	**20**
SOC Code	**Will be grayed out until you validate the job information**
County Code	**Wake**
Position Types	**None**

> **NOTE**: Be aware that when you perform a matchcode search, sometimes the search view can change. To see the possible search view choices, click on (Other search help) at the bottom of the search screen displayed. A pop-up box displays your search view choices. Click on the search you need. Your view will change to that search view.

2. You will need to search for the eight-digit ID code for Org Unit to which the position belongs and the ID code for Job that describes the position.
   - Click in the Org Unit field and click the matchcode. Select the **Abbreviation & Name** tab.
   - In the Name field, type ***Legal Services Branch***. (Don't forget the wild cards.)
   - Click the **green check mark** (Enter) to search. DOJ Legal Services Branch is displayed in a pop-up box.
   - Double-click on the text to apply it to the Org Unit field.
   - **Repeat** the steps for the Paralegal job.
3. Refer to the scenario for the data for the **Reports To** field.
4. Click **Enter** to verify your information on the General tab.
5. You are prompted to complete the SOC field. Click on the **matchcode** and select the code displayed.
6. Click **Enter** to verify your information.
7. Note that the Level field in the Pay Grade tab at the bottom of the screen is populated. Confirm that the levels are correct based on the information given in the scenario.
8. **Save** your request.

   > **NOTE**: For instructional purposes, you are not going to enter any address information for the position.

9. Enter a Holiday Premium Rate of **50%** on the Time tab.
10. Click **Enter**.
11. **Save** your request.

12. Add a Services for Object note **for OSHR**.

13. **Save** your request.

    IMPORTANT: Write the position number that was generated by the system for your position on your Transaction Log. Also write down your PCR number.

14. Initiate **Workflow**.

15. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

KNOWLEDGE CHECK

Answer	Question
	1. The Cost tab will be completed by ___.
	2. True or False: Before you initiate Workflow, you may access the Create New Position action using the Change mode to modify or add data (including the effective date).
	3. All position actions entered through the ___ transaction need approval before the action can be executed.
	4. The OSC HR/Payroll system automatically assigns the ___ for actions that involve graded positions.
	5. True or False: The PCR number is used by the system to track the status of the position actions.
	6. As a best practice, we recommend that you do not begin creating a ___ until you have all of the data requirements that you need.

SUMMARY

In this lesson you learned to:

- Create both graded and banded positions using the Position Actions transaction code, ZOMA069.

Display Position Infotypes Using Infotype Reporting

Lesson 3 Objectives

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

- Explain the difference between active and planned position (infotype) statuses
- Validate your data entries by displaying the OM infotypes for a position

Actions You Will Perform in this Lesson

Display the position infotypes for these positions:

- Paralegal
- Building Technician
- Market Promotions Assistant

Key Terms

Infotype - used in the HR/Payroll system to group data fields that are similar content

- Examples of Position infotypes:
  - **Relationships, 1001** - Defines the Relationships between different objects such as Org unit to Org unit, Position to Org unit, etc.
  - **Planned Compensation, 1005** - Stores data that uses the salary and pay scale structures to create planned compensation data at the job and position level. The system uses the information stored in this infotype to suggest default values for the Basic Pay infotype, 0008.

Subtype - categorizes the information within an infotype record. Not all infotypes have subtypes.

- Examples of Position subtypes:
  - The Relationships infotype has several subtypes, such as:
    - ❖ A002 – Reports (line) to
    - ❖ A007 – Describes
    - ❖ A008 – Holder

— The Addresses infotype has these subtypes:
- ❖ Main
- ❖ Mailing
- ❖ Courier

List of Required Position Infotypes

Infotype	IT #
Object	1000
Relationships	1001
Planned Compensation	1005
Vacancy	1007
Acct, Assignment Features	1008
Full Time Equivalent	1011
Employee Group/Subgroup	1013
Cost Distribution	1018
Charge Object Assignment	9015
Display Budget	9018
SOC/County Code	9022
Position Types	9023
OM Actions (This infotype is created when a position action has occurred.)	9000

Take a moment to review the OM Infotypes reference guide. It contains a complete description of all the OM infotypes.

Discuss with the instructor any questions you have about OM infotypes.

The infotypes listed on this page are required for a Position to exist in the system.

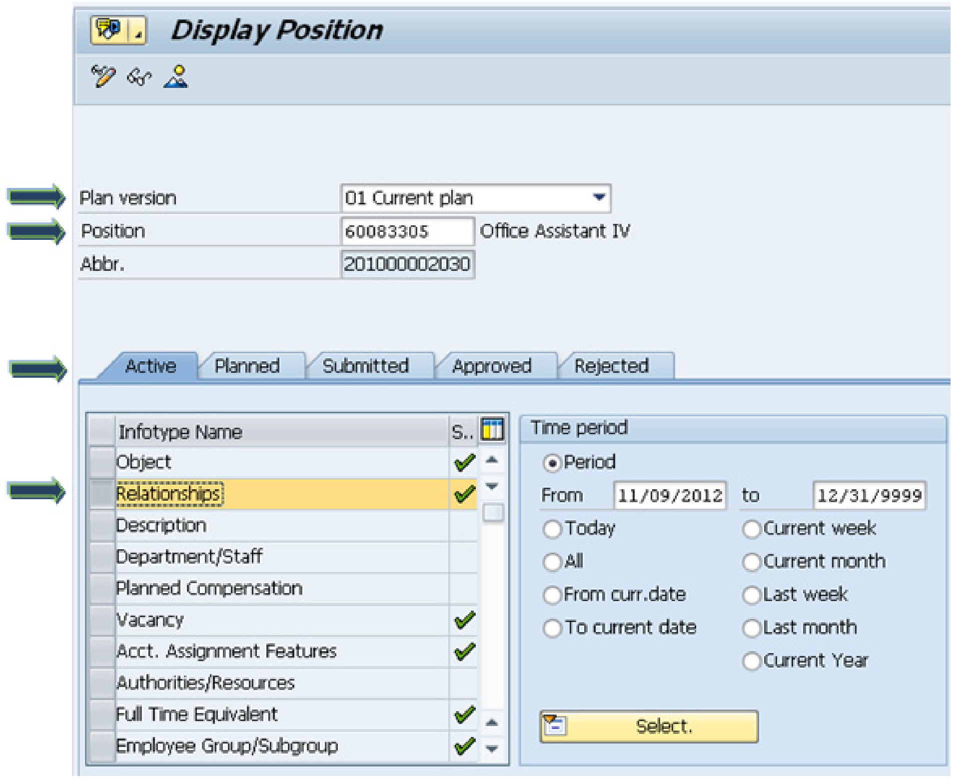
🗁 **NOTE**: Even though they share the same infotype (9022), the SOC code and the County code are not related. They are separate types of data.

List of Conditional & Optional Infotypes

Infotype	IT #
Overtime Compensation	9005
Holiday Payout Period	9006
Night Shift Premium	9007
Evening Shift Premium	9008
Weekend Shift Premium	9009
Holiday Premium Rate	9010
On-Call	9011
Callback	9012
Extended duty	9016
Vacancy posting data	9025
Reference Position Number (for PMIS positions)	9021
(Optional) Description	1002
(Optional) Address: Main, Mailing, and Courier	1028

The infotypes listed on above are either conditional or optional for a Position. Conditional infotypes are specific to position characteristics. For example, if a Position is eligible for overtime compensation, then the Overtime Compensation infotype will be created.

Position Infotypes



Transaction code Display Position - PO13D allows you to display the infotypes that have been created in planned status using the ZOMA069 transaction. Once you enter the position and select the desired Plan version, the Display Position screen is displayed.

The screen is laid out by tabs. Active, Planned, and Rejected are the only tabs in use at this time.

Infotypes created for the position selected are displayed in the box on the left hand side of the screen with a green check mark next to the infotype name. This indicates that data exists for that infotype.

Highlight the line and click the Display button to view the specific infotype record.

Position infotype “flags” set on specific infotypes also affect employee time and pay. A sample list of those infotypes is listed below:

- Substitutions - IT2003 (Time Infotype)
- Overtime Compensation – IT9005
- Holiday Payout Period – IT9006
- Night Shift Premium – IT9007
- Evening Shift Premium – IT9008
- Weekend Shift Premium – IT9009
- Holiday Premium Rate – IT9010
- On-Call – IT9011
- Callback – IT9012
- Weekend Nurse – IT9014
- Extended Duty – IT9016
- Gap Hours – IT9017

EXERCISE 3.1: Display Position Infotypes

SCENARIO

In Lesson 2, Workflow was initiated for the part-time banded Paralegal position for the Legal Division of Justice. You now want to verify that the SOC code is correct. You can do this using Display Position transaction, PO13D. The position will be available the first day of the next calendar quarter.

- For this exercise, verify that your data entries match the SOC code in the data table for Exercise 2:6

Instructions

In this exercise, you will display the infotypes that have been created in planned status for the new Paralegal position that you created in 2:6 - Exercise. You will use the PO13D transaction to view the infotype data.

For more information, the *OM Infotypes* Job Aid is available on the OSC Training HELP website in the OM >Job Aids folder.

1. Type **PO13D** in the Command field and press **Enter** or select it from your Favorites folder.
2. Accept **01** for Current Plan as the default value in the **Plan Version** field.
3. In the Position field, enter the **position number** of the Paralegal position you created earlier in the class and press **Enter**.

   The Active tab is displayed. Notice that there are no green checks indicating the existence of any data in the infotypes. This position is not in an Active status currently.
4. Click the **Planned** tab. Notice that data exists in multiple infotypes.
5. Locate the **SOC and County Code** infotype by scrolling down the list. The SOC and County Code infotype is near the end of the list.
6. Click in front of the SOC and County Code infotype.
7. Click the **Display Infotype** icon to view the SOC code for this position.
8. Click the **Back** button until you return to the Easy Access screen.

This exercise is complete.

KNOWLEDGE CHECK

Use the **OM Infotypes Job Aid** located on the Training HELP web page to assist you in the following Knowledge Check activity. Your instructor can assist you in locating it if needed.

Write the infotype numbers in the **Answer** boxes.

Which infotype...	Answer
1. Stores the salary and pay scale structure?	
2. Defines the relationships between different OM objects?	
3. Defines the work schedule for the Position?	
4. Stores the Company Code, Personnel Area, and Personnel Subarea for the Position?	
5. Stores the SOC code for the Job?	
6. Captures information for critical Position types?	
7. Stores the 15-digit Position number from PMIS and the 8-digit SAP reference Position number?	
8. Stores Position budget information?	
9. Stores settings to calculate holiday compensation?	
10. Stores settings for Positions that are eligible for On-Call compensation?	

SUMMARY

In this lesson you learned to:

- Explain the difference between active and planned position (infotype) statuses
- Validate your data entries by displaying the OM infotypes for a position

Position Reallocation

Lesson 4 Objectives

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

- Reallocate a Position up
- Reallocate a Position down

Position Reallocation

Reallocation actions are performed in the HR/Payroll system when a position is assigned to a different level and Job classification. The reallocation can be up, down, or horizontal.

Actions You Will Perform in this Lesson

- Reallocate up the position Historic Preservation / Restoration Specialist I to a Historic Preservation / Restoration Specialist II, job grade 68 to 70
- Reallocate down the temporary Program Assistant IV to a temporary Processing Assistant II, job grade 59 to 54

* *

EXERCISE 4.1: Reallocate a Position Up

SCENARIO

The position description for the Historic Preservation/Restoration Specialist I (grade 68) has been updated to include a new task requiring a higher level of skill. The position needs to be reallocated to match the new skill level. The position will be reallocated to a Historic Preservation/Restoration Specialist II (grade 70). Your agency's analyst has asked you to perform the Position Action 103, Reallocate Position Up. The position will continue to report to the current supervisor's position.

Instructions

The following BPP is available to assist you in displaying infotypes: **Action 103 Initiate Reallocate Position Up**.

1. Enter transaction code **ZOMA069**, Position Actions, in the command field and then click **Enter** to display the initial screen for the transaction.

2. Type or select **103**, for Reallocate Position Up, in the **Action** field, and then click **Enter**. The screen is refreshed and displays additional fields.

POSITION #: *Historic Preservation/Restoration Specialist II*							
A	65002397	F	65002402	K	65002407	P	65002412
B	65002398	G	65002403	L	65002408	Q	65002413
C	65002399	H	65002404	M	65002409	R	65002414
D	65002400	I	65002405	N	65002410	Inst 1	65002415
E	65002401	J	65002406	O	65002411	Inst 2	65002416

3. From the table above, select the Position number assigned to you by your instructor and enter it into the **Position** field.

4. Type or select the effective start date for the reallocation in the **Valid from** field in the mm/dd/yyyy format. For this exercise, type the first day on the **next calendar quarter**.

5. Accept the default value of 12/31/9999 for the **Valid to** field.

6. Click **Create**. The Reallocate Position Up – CREATE screen is refreshed and now displays the General tab and Pay Grade tab with a New Values column.

7. Complete the following fields in the **New Values** column on the General tab:

Field	Value
POSITION RELATIONSHIPS	
Position abbr.	DocResSpecII
Position Name	Documentation Restoration Spec
Job	Historic Preservation/Specialist SPE II **Hint**: (search for the job number using the matchcode)
Reports To	Archaeology & Historic Preservation Adm (same org unit)
EMPLOYEE GROUP/SUBGROUP	
Employee Group	SPA Employees
EE Subgroup	Full time not subject to FLSA overtime, permanent (A1)

8. Click **Enter** to validate your data entries and to populate the Pay Grade tab.

9. **Save** your request.

> **PROCESS NOTE:**
> Normally, when processing this action, you will need to also:
> - Go to the **Time** tab and confirm Time settings on the Position. Change if necessary. **Save**.

10. Add a **Services for Object** note for OSHR.

11. Click **Enter** to validate.

12. **Save** your request.

13. Click Initiate Work Flow to initiate workflow. The system displays the message, "Workflow submitted for position: ######## PCR ID: **********," where ######## is the eight-digit position number and ********** is the SAP generated number for the position change request ID. The screen is refreshed to display in read-only view.

14. **IMPORTANT**: Write the PCR ID number that was generated by the system for your workflow item on your Transaction Log.

15. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 4.2: Reallocate a Position Down

> ***SCENARIO***
>
> A decision has been made to reallocate down the temporary position Program Assistant IV to a temporary Processing Assistant II that belongs to the Grants and Communication region. Your agency's Personnel Analyst has asked you to perform the Position Action 104, Reallocate Position Down.

Instructions

The following BPP is available to assist you in displaying infotypes: **Action 104 Initiate Reallocate Position Down**.

1. Enter transaction code **ZOMA069**, Position Actions, in the command field and then click **Enter** to display the initial screen for the transaction.

2. Type or select **104**, for Reallocate Position Down, in the **Action** field, and then click **Enter** . The screen is refreshed and displays additional fields.

POSITION #: *Processing Assistant II*									
A	65002377	F	65002382	K	65002387	P	65002392		
B	65002378	G	65002383	L	65002388	Q	65002393		
C	65002379	H	65002384	M	65002389	R	65002394		
D	65002380	I	65002385	N	65002390	Inst 1	65002395		
E	65002381	J	65002386	O	65002391	Inst 2	65002396		

3. From the table above, select the Position number assigned to you by your instructor and enter it into the **Position** field.

4. Type or select the effective start date for the reallocation in the **Valid from** field in the mm/dd/yyyy format. For this exercise, type the first day on the **next calendar quarter**.

5. Accept the default value of 12/31/9999 for the **Valid to** field.

6. Click **Create** . The Reallocate Position Down – CREATE screen is refreshed and now displays the General tab and Pay Grade tab with a New Values column.

7. Complete the following fields in the **New Values** column on the General tab:

Field	Value
POSITION RELATIONSHIPS	
Position abbr.	CommAsstII
Position Name	Communications Intake Assistant
Job	Processing Assistant II **Hint**: (matchcode: Abbreviation & Name)
Reports To	Historic Preservation/Restoration Supervisor **Hint**: (no change in Reports to)
EMPLOYEE GROUP/SUBGROUP	
Employee Group	Supplemental Staff
EE Subgroup	Temp FT S-FLSAOT (G8)

8. Click **Enter** to validate your data entries and to populate the Pay Grade tab.

9. **Save** your request.

10. Add a **Services for Object** note for OSHR.

11. Click **Enter** to validate.

12. **Save** your request.

13. Click **Initiate Work Flow** to initiate workflow. The system displays the message, "Workflow submitted for position: ######## PCR ID: **********," where ######## is the eight-digit position number and ********** is the SAP generated number for the position change request ID. The screen is refreshed to display in read-only view.

14. **IMPORTANT**: Write the PCR ID number that was generated by the system for your workflow item on your Transaction Log.

15. Click **Back** to return to the SAP Easy Access screen.

> **PROCESS NOTE:**
> If a reallocated position needs to change where it exists in the Org structure, two actions are required: the Reallocation action and the Transfer action. *(See Lesson 5 for Transfer Action instruction.)*
>
> **NOTE**: OSC BEST Shared Services recommends that the Position Transfer action be worked first.

> **PROCESS NOTE:**
> For most OM actions, there should be a corresponding PA action. The OM action must be completed before the PA is initiated.

This exercise is complete.

* *

Additional Resources
You can find several additional support materials about the different Reallocation Actions on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *Organization Management > BPPs* • Reallocate Position (Actions 103-108) *Organization Management > Job Aids* • OM Position Actions

SUMMARY

In this lesson you learned to:

- Reallocate a Position up
- Reallocate a Position down

Other Position Actions

Lesson 5 Objectives

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

- Use the Position Actions transaction (ZOMA069) to:
  - — Transfer a position to another Organizational Unit
  - — Change the Employee Group and Employee Subgroup assigned to a position
  - — Change the County assignment for a position
- Use the Maintain Position transaction (PO13) to:
  - — Change the title of a position
  - — Create a position vacancy
- Explain the procedure to Abolish a position
- Explain the Position Overview Screen (ZPOS)

Actions You Will Perform in this Lesson

- Transfer a Position within the same Agency.
- Change the Employee Group and Employee Subgroup assigned to the part-time, Office Assistant IV position to full-time status
- Change the County assignment for a Transportation Worker in Division 5 from Wake to Durham
- Change the Personnel Technician I position title to Salary Administrator
- Create a full-time position (on your own)

Position Transfers

In the HR/Payroll system, agencies can only process position transfers within the same agency if the user has this security role.

For position transfers from one agency to different agency, contact BEST Shared Services. The appropriate agency approvals must be obtained and a spreadsheet provided with the applicable information prior to BEST Shared Services processing the position transfer.

EXERCISE 5.1: Transfer a Position Within the Same Agency

SCENARIO
Due to expansion, a full-time Office Assistant III position at Cultural Resources CDS Archives & History Eastern Office is being transferred the 15th of next month to Cultural Resources Archives & History Restoration Branch. Your agency's personnel analyst has asked you to perform the Position Action 113, Position Transfer.

Instructions

The following BPP is available to assist you in displaying infotypes: **Action 113 Transfer Position**.

1. Enter transaction code **ZOMA069**, Position Actions, in the Command field and then click **Enter** to display the initial screen for the transaction.

2. Type or select **113**, for Position Transfer, in the **Action** field, and then click **Enter**. The screen is refreshed and displays additional fields.

POSITION #: *Office Assistant III*							
A	65002317	F	65002322	K	65002327	P	65002332
B	65002318	G	65002323	L	65002328	Q	65002333
C	65002319	H	65002324	M	65002329	R	65002334
D	65002320	I	65002325	N	65002330	Inst 1	65002335
E	65002321	J	65002326	O	65002331	Inst 2	65002336

3. From the table above, select the Position number assigned to you by your instructor and enter it into the **Position** field.

4. Type or select the effective start date for the transfer in the **Valid from** field in the mm/dd/yyyy format. For this exercise, see the Scenario information.

5. Accept the default value of 12/31/9999 for the **Valid to** field.

6. Click **Create** . The Position Transfer – CREATE screen is refreshed and now displays the General tab and Pay Grade tab with a New Values column.

7. Complete the following fields in the **New Values** column on the General tab:

Field	Value
Org unit	**CR CDS A&H HIS RES HPO Restoration Branch** (matchcode search) (**Hint**: Abbreviation & Name)
Reports To	**60083643**
Personnel Area	**4601**

Personnel Subarea	NC01
EE Group	SPA Employees
EE Subgroup	FT S-FLSAOT Perm (B1)
County	Wake (092)

8. Click **Enter** to validate your data entries.
9. Verify that the addresses are correct.
10. To add an address, perform these actions:
    - Select the subtype. For this exercise, select **Courier**.
    - Click the **Get Address** button.
    - If information is shown in the fields, highlight and replace with the information below.

Field	Value
House no./street	4617 MSC
PCode/City	27699 Raleigh
Telephone number	919-807-6582

11. Click **Enter** to validate.
12. Click the **Time** tab to continue. The screen refreshes and displays the data fields required for time entry and payroll calculation rules.
13. Complete the following fields:

Field	Value
Overtime Compensation	
Comp Aging Limit	365 Days
Holiday Payout Period	
Comp Aging Limit	365 Days
Night Shift Premium	
Night Shift Prem Rate	10%
Holiday Premium Rate	
Holiday Premium Rate	50%

14. **Enter** to validate.
15. Click **Save** to save the information entered on the Time tab.
16. Add a **Services for Object** note for OSHR.
17. Click **Enter** to validate.
18. **Save** your request.

19. Initiate Workflow.
20. **IMPORTANT**: Write the PCR ID number that was generated by the system for your workflow item on your Transaction Log.
21. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 5.2: Change the Employee Group/Subgroup

SCENARIO

Funding has been secured to change the part-time **Historic Preservation Reso RA SUPVR** position to full-time status. This event necessitates a change to the Employee Group and Employee Subgroup assigned to the position. Your agency's personnel analyst has asked you to perform the Position Action 116, Position Employee Group/Subgroup change. The change is effective the first day of the next quarter.

Instructions

The following BPP is available to assist you in displaying infotypes: **Action 116 Position Employee Group Subgroup Change**.

1. Enter transaction code **ZOMA069**, Position Actions, in the command field and then click **Enter** to display the initial screen for the transaction.
2. Type or select **116**, for Position Employee Group/Subgroup Change, in the **Action** field, and then click **Enter**. The screen is refreshed and displays additional fields.

POSITION #: *Historic Preservation Reso RA SUPVR*							
A	65002337	F	65002342	K	65002347	P	65002352
B	65002338	G	65002343	L	65002348	Q	65002353
C	65002339	H	65002344	M	65002349	R	65002354
D	65002340	I	65002345	N	65002350	Inst 1	65002355
E	65002341	J	65002346	O	65002351	Inst 2	65002356

3. From the table above, select the Position number assigned to you by your instructor and enter it into the **Position** field.

4. Type or select the effective start date for the Employee Group/Subgroup change in the **Valid from** field in the mm/dd/yyyy format. The position is effective on the first day of the next calendar quarter.

5. Accept the default value of 12/31/9999 for the **Valid to** field.

6. Click **Create**. The Position Employee Group/Subgroup – CREATE screen is refreshed and now displays the General tab and Pay Grade tab with a New Values column.

7. Complete the following fields in the **New Values** column on the General tab:

Field	Value
Weekly Working Hours	40
EE Group	**SPA Employees**
EE Subgroup	FT S-FLSAOT Perm **(B1)**
Overtime Compensation	
Comp Aging Limit	**30 Days**
Holiday Payout Period	
Comp Aging Limit	**365 Days**
Night Shift Premium	
Night Shift Prem Rate	**10%**
Holiday Premium Rate	
Holiday Premium Rate	**50%**

8. Click **Enter** to validate your entries.

9. **Save** the information on the Time tab.

10. Add a **Services for Object** note for OSHR.

11. Click **Enter**.

12. **Save** your request.

13. Initiate Workflow.

14. **IMPORTANT**: Write the PCR ID number that was generated by the system for your workflow item on your Transaction Log.

15. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 5.3: Change the County Assignment for a Position

SCENARIO

Change the Wake County assignment to Durham County for a Historic Preservation/Restoration Specialist II in Cultural Resources org unit. Your agency's personnel analyst has asked you to perform the position action 122, Position County Change. The change is effective the first day of the next calendar quarter.

Instructions

The following BPP is available to assist you in displaying infotypes: **ZOMA069 Position County Change**.

1. Enter transaction code **ZOMA069**, Position Actions, in the command field and then click **Enter** to display the initial screen for the transaction.

2. Type or select **122**, for Position County Change, in the **Action** field, and then click **Enter**. The screen is refreshed and displays additional fields.

POSITION #: *County Assignment Change*							
A	65002297	F	65002302	K	65002307	P	65002312
B	65002298	G	65002303	L	65002308	Q	65002313
C	65002299	H	65002304	M	65002309	R	65002314
D	65002300	I	65002305	N	65002310	Inst 1	65002315
E	65002301	J	65002306	O	65002311	Inst 2	65002316

3. From the table above, select the Position number assigned to you by your instructor and enter it into the **Position** field.

4. Type or select the effective start date for the county change in the **Valid from** field in the mm/dd/yyyy format. The position change is effective on the first day of the next calendar quarter.

5. Accept the default value of 12/31/9999 for the **Valid to** field.

6. Click **Create**. The Position County Change – CREATE screen is refreshed with active fields displayed.

7. Complete the following fields in the **New Values** column on the General tab:

Field	Value
Position	
County Code	**Durham**

8. Click **Enter** to validate your entries.

9. **Save** the information you entered.

10. Add a **Services for Object** note for OSHR.

11. Click **Enter**.

12. **Save** your request.

13. Initiate Workflow.

14. **IMPORTANT**: Write the PCR ID number that was generated by the system for your workflow item on your Transaction Log.

15. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

Position Actions Involving Workflow

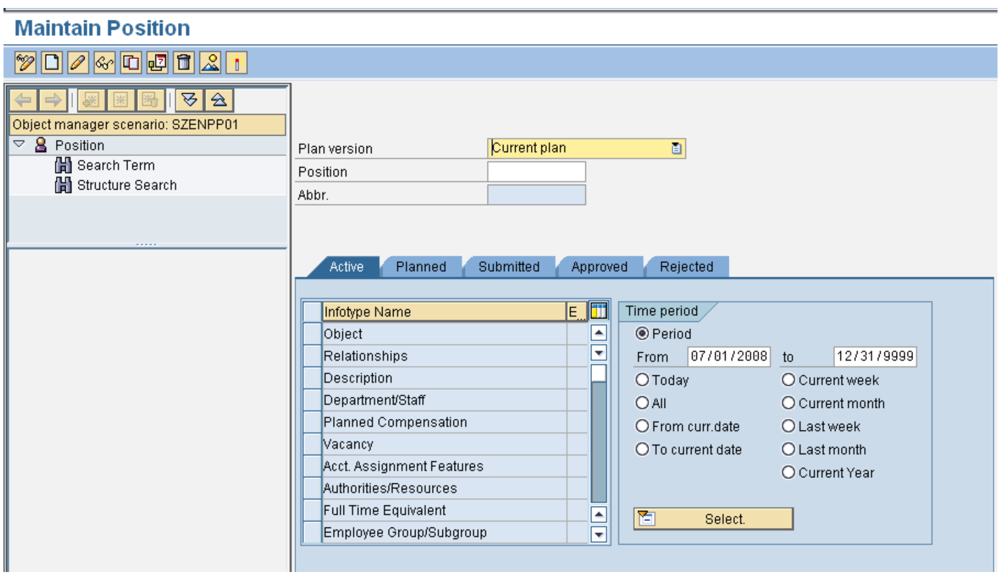
OM Position Process	Input Method
New Position/Fund Position	Workflow
Reallocation Actions	Workflow
Position Transfer	Workflow
Position Hours Change	Workflow
Position Type Change	Update directly in the HR/Payroll system (PO13)
County Change	Workflow
Supervisor Change	Workflow
Position Address Change	Update directly in the HR/Payroll system (PO13)
Position Time Settings Change	Update directly in the HR/Payroll system (PO13)
Position Working Title Change	Update directly in the HR/Payroll system (PO13)
Cost Distribution Change	Update directly in the HR/Payroll system...unless part of another OM Action (PO13)
Budgeted Salary Change	Update directly in the HR/Payroll system...unless part of another OM Action (PO13)

PROCESS NOTE: The Services for Object list icon is located at the upper left-hand corner of processing screens. This functionality <u>must</u> be used to notify the Office of State Human Resources (OSHR) of the position action request. Also you can use this feature to communicate critical process information with BEST Shared Services, especially in the following actions:

- Position Type Change
- Position Address Change
- Position Time Settings Change
- Position Working Title Change
- Cost Distribution Change
- Budgeted Salary Change

The Services for Object feature may also be used to attach a file or a web link (URL) to the record. It may also be used to attach a private note as a reminder of the purpose for creating the action, to document resource data used in the information gathering process for the action or for numerous other reasons you may choose to document. Only the initiator can see a private note.

PO13 - Maintain Positions



The **PO13 – Maintain Position** transaction is used primarily when Workflow is not necessary. It is used to create and maintain infotypes on any position. Some infotypes may require approval. If they do, they are routed through Workflow.

Examples of when PO13 would be used include:

- Position Address changes
- Working Title changes
- Time Settings
- Position Type
- Budgeted Salary Change
- Cost Distribution (can also be changed in ZOMA069)

The process is as follows:

1. Enter **PO13** in the Command field
2. Press **ENTER**. The Maintain Positions screen is displayed.
3. Highlight the desired infotype.
4. Click either the **Display** or **Change** button based on whether viewing or processing is needed.
5. The infotype is displayed in the requested mode.

Be sure to check the OSC Training HELP website to access the Business Process Procedures (BPPs) for detailed procedures for the PO13 transaction. (*Go to the OM >BPP folder.*)

🗁 **REMEMBER**: Don't forget to add your notes using the Services for Objects icon.

Position Naming Conventions

You can use the Position Action transaction to enter a working title for a position.

The Position name long text:

- Is to be entered using title case, with capitalized Roman numerals.
- Can be customized by the agency to denote a working title.
- Should be more descriptive than the job title.
- Usually will not contain Roman numerals.

Example: Market Promotions Assistant

****

EXERCISE 5.4: Change the Working Title for a Position

SCENARIO
A request has been made to change the working title for the Office Assistant III position. The working title is Salary Administrator. Your agency's personnel analyst has asked you to perform the Position Title Change. It is effective today!

Instructions

The following BPP is available to assist you in displaying infotypes: **PO13 Change Position Working Title**.

1. Enter transaction code **PO13**, Maintain Positions, in the Command field and then click **Enter** to display Maintain Positions screen.
2. Be sure the Active tab is displayed.

POSITION #: *Working Title Change*							
A	65002317	F	65002322	K	65002327	P	65002332
B	65002318	G	65002323	L	65002328	Q	65002333
C	65002319	H	65002324	M	65002329	R	65002334
D	65002320	I	65002325	N	65002330	Inst 1	65002335
E	65002321	J	65002326	O	65002331	Inst 2	65002336

3. From the table above, select the Position number assigned to you by your instructor and enter it into the **Position** field.

4. Click **Enter** to display the position record. For purposes of this exercise, the Office Assistant III is displayed.

5. Select the **Object** infotype.

6. Click **All** in the Time period section.

7. Click the **Copy** button. The Copy Object screen is displayed.

8. Complete the following fields:

Field	Value
Validity	**Today**
To	**Accept the default value (12/31/9999)**
Object abbr.	**SalaryAdmin**
Object Name (Working Position Title)	**Salary Administrator_XX** (where XX is your initials)

9. Click **Enter** to validate your entries.

10. Add a **Services for Object** note for OSHR.

11. **Save** the data you entered. The Create Object pop-up box is displayed.

12. Click **Yes** to delimit the previous record. The Maintain Position screen displays.

13. Ensure that **All** is selected in the Time period area.

14. Click **Overview**. You will see both Object records displayed.

15. Click **Back** to return to the Maintain Position screen.

16. Click **Back** again to return to the SAP Easy Access screen.

This exercise is complete.

* *

Setting a Position for Posting in NeoGov

In order to make a position available for posting in NeoGov, the Vacancy Infotype (IT1007) must be set to “open.” Once the position is set to “open,” the position will be included in the nightly file sent to NeoGov and available to post the next day.

🗁 A position can be set to “open” even if there is a valid holder.

* *

EXERCISE 5.5: Set a Position for Posting in NeoGov

SCENARIO

Your Safety Officer, James Maresca, has submitted his resignation effective the 15th of next month. You have received approval to post his position in the NeoGov (eRecruit) system. Use the PO13 transaction to create a vacancy status on the position

Instructions

The following BPP is available to assist you in creating a position vacancy: **PO13 Create Position Vacancy**.

1. Enter transaction code **PO13**, Maintain Positions, in the Command field and then click **Enter** to display the Maintain Positions screen.

2. From the table below, select the Position number assigned to you by your instructor and enter it into the **Position** field.

POSITION #: *Create Position Vacancy*							
A	65002575	F	65002580	K	65002585	P	65002590
B	65002576	G	65002581	L	65002586	Q	65002591
C	65002577	H	65002582	M	65002587	R	65002592
D	65002578	I	65002583	N	65002588	Inst 1	65002593
E	65002579	J	65002584	O	65002589	Inst 2	65002594

3. Click **Enter** to display the position record. For purposes of this exercise, the Safety Officer III is displayed.

4. Select the **Vacancy** infotype (IT1007).

5. Click the **Create (F5)** button.

6. Change the **validity period** to today’s date.

   🗁 **CRITICAL**: This step must be completed with the new date of the position vacancy.

7. Since the system knows you are creating a vacancy, it defaults the radio buttons in the Vacancy fields to **Open**.

8. Click the **Enter** button.

9. Click the **Save** button. The Vacancy Create pop-up box is displayed.

10. Click **Yes** to create the vacancy.

View an Existing Vacancy Status

11. In the Time Period area, select the **All** radio button.

12. Select the **Vacancy** infotype.

13. Click the **Overview** button to see all Vacancy records.

14. Click the **Back** button to complete the process.

****

EXERCISE 5.6: Create a Full-Time Banded Position

SCENARIO

This exercise encompasses much of the information you have learned in class today.

Use the steps and data presented below to complete the exercise scenario in the system.

Work with other class members as guided to do so by your instructor.

The Western Office of the History Department of Cultural Resources (CR CDS A&H HIS RES WESTERN OFFICE) has received funding for a new **Regional Business Operations Manager** position. The new position short name should be **BusOpsMgr**.

- Will be available the first day of the next calendar quarter
- Permanent, full-time position working forty hours per week
- Not subject to FLSA overtime
- The Personnel subarea is **NC01**.
- The EE subgroup is Full time not subject to FLSA overtime, permanent (A1)
- Is described by the job (class) **Business Officer I**.
- Reports to the Archives and History Regional Supervisor. (*Hint*: Open new session. Use PPOSE to search for the Archives and History Regional Supervisor position in the Western Office of the History Department of Cultural Resources.)
- Is in the SPA Employees employee group
- SOC code is 131000
- Is located in Buncombe County at 2600 Tunnel Rd, Asheville, NC, 28804.
    - The phone number is 828-444-1212.
    - The courier route is CS#17-27-37, Asheville NC 28803.
    - Fax number is 828-444-1313.
- OT Comp setting - 30-day aging limit
- Is eligible for the 50% holiday premium
- Is eligible for 10% night shift premium rate
- Is designated as a key position with replacements

Instructions

Complete the following exercise scenario in the system.

1. Access the **ZOMA069**, for Position Actions transaction and create a full-time **Regional Business Operations Manager** position using the information provided in the scenario above. Initiate workflow once you have entered all of the data.

   Hint: You may need to open a second session and use PPOSE to search for the organizational unit and reporting supervisor codes to enter on the General tab in your original session.

2. Be sure to capture your PCR and position number on your transaction log.
3. Return to the SAP Easy Access screen when you have completed the exercise.
4. Wait for review by an Instructor.

This exercise is complete.

* *

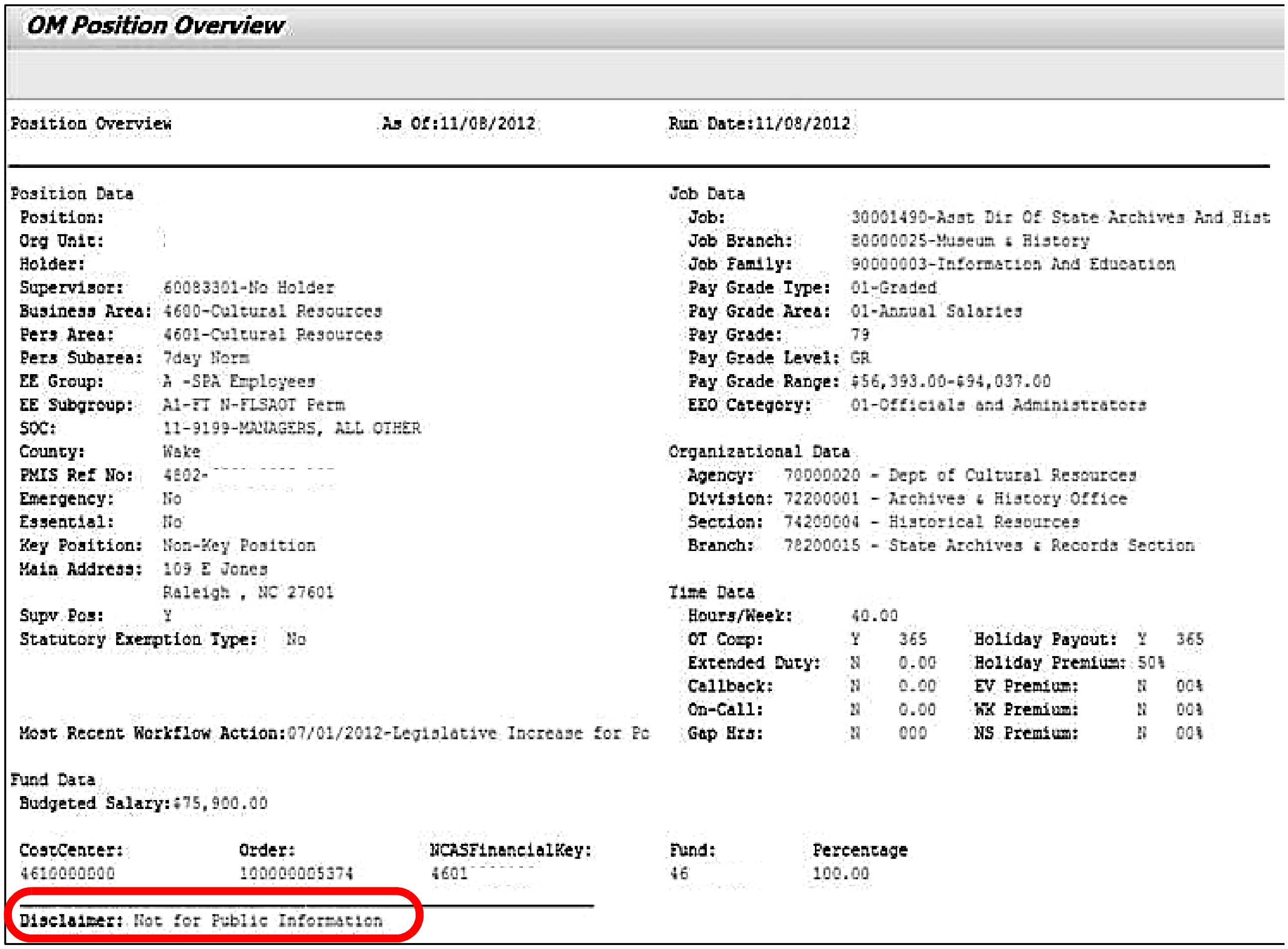
Abolishing a Position

The Abolish position action can only be executed by BEST HR. Prior to BEST abolishing the position, it must be vacant (i.e., the holder has been separated or transferred).

If the position is a supervisory position, all subordinate positions <u>must</u> be reassigned to another supervisor *before* the current supervisory position is abolished.

Additional Resource
You can find several additional support materials about abolishing a position on the BEST website: http://www.osc.nc.gov/BEST/forms.html Follow the following path to access the latest version of the job aids: *Forms > Organizational Management* • Abolish Position Spreadsheet

ZPOS - Position Overview Screen


OM Position Overview

Position Overview   As Of:11/08/2012   Run Date:11/08/2012

Position Data		Job Data	
Position:		Job:	30001490-Asst Dir Of State Archives And Hist
Org Unit:		Job Branch:	80000025-Museum & History
Holder:		Job Family:	90000003-Information And Education
Supervisor:	60083301-No Holder	Pay Grade Type:	01-Graded
Business Area:	4600-Cultural Resources	Pay Grade Area:	01-Annual Salaries
Pers Area:	4601-Cultural Resources	Pay Grade:	79
Pers Subarea:	7day Norm	Pay Grade Level:	GR
EE Group:	A -SPA Employees	Pay Grade Range:	$56,393.00-$94,037.00
EE Subgroup:	A1-FT N-FLSAOT Perm	EEO Category:	01-Officials and Administrators
SOC:	11-9199-MANAGERS, ALL OTHER		

		Organizational Data	
County:	Wake	Agency:	70000020 - Dept of Cultural Resources
PMIS Ref No:	4802-	Division:	72200001 - Archives & History Office
Emergency:	No	Section:	74200004 - Historical Resources
Essential:	No	Branch:	78200015 - State Archives & Records Section
Key Position:	Non-Key Position		
Main Address:	109 E Jones Raleigh , NC 27601		

		Time Data					
Supv Pos:	Y	Hours/Week:	40.00				
Statutory Exemption Type:	No	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%
Most Recent Workflow Action:	07/01/2012-Legislative Increase for Pc	Gap Hrs:	N	000	NS Premium:	N	00%

Fund Data
Budgeted Salary:$75,900.00

CostCenter:	Order:	NCASFinancialKey:	Fund:	Percentage
4610000000	100000005374	4601	46	100.00

Disclaimer: Not for Public Information

The Position Overview screen is a “snapshot” of a position’s information. This is a brief overview of the ZPOS transaction.

The transaction is initiated by entering a position number and a date to define what time frame a HR user needs to view a particular position.

1. Enter **ZPOS** in the Command field on the Easy Access screen and press the Enter key or click the Enter button.

2. Enter a **Position Number**. You can enter the 8-digit position number or click the matchcode to perform a search for the position using the organizational structure.

3. The current date defaults into the Selection Date field. The HR user has the option to enter any date that the position has data in the system and for which the user has security access. 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.

The Position Overview screen will display as of the selection date you entered on the first screen. The Run Date is the current date. The only exception is the Most Recent Workflow Action which is always current, no matter what date is entered. The other fields are pulled from existing infotypes.

For more information, see the *Position Overview Screen* job aid located on the OSC Training HELP website in the OM > Job Aids folder.

KNOWLEDGE CHECK

Which Position action should you use?

Take a few minutes and choose the position action that should be performed for each business event. If needed, please refer to the **OM Position Actions** reference guide that is available on the OSC Training HELP website in the OM > Job Aids folder.

Scenario	Action
1. In an Organizational restructure, the Training Manager position now reports to the Director of Change Management.	
2. The Quality Technician position is being transferred from Forsyth county to Guilford county.	
3. In a review of workload balancing for an org unit, it was determined that the Transportation Worker IV position setting should be changed from a Key position to an Essential position and then moved to a new org unit.	
4. The number of hours per week of a part-time position is changing but the appointment type (Employee Group field) and the FLSA rules for the position are not affected.	
5. Individual is moved from a Solution Delivery Consultant II position to a Technical Delivery Specialist II within the same department. These positions are the same grade. The existing position is maintained by changing the Job that describes the position.	

SUMMARY

In this lesson you learned to:

- Use the Position Actions transaction (ZOMA069) to:
  - Transfer a position to another Organizational Unit
  - Change the Employee Group and Employee Subgroup assigned to a position
  - Change the County assignment for a position
- Use the Maintain Position transaction (PO13) to:
  - Change the title of a position
  - Create a position vacancy
- Explain the procedure to Abolish a position
- Explain the Position Overview Screen (ZPOS)

OM Workflow Process & Inquiry

Lesson 6 Objectives

- Explain the purpose of Workflow
- Define key Workflow terms
- Describe the OM Workflow process
- Discuss the routing and processing of OM Workflow PCRs
- Understand the purpose of the PCR# and the PCR date
- Identify how to troubleshoot PCRs
- Execute Workflow Reports
- Display status information for a position action (Workflow item) using the *OM Workflow Report*, ZOM0178
  - — Change the layout of the report
  - — Create a variant for the report
  - — Retrieve a report variant
- Display status information for a position action (Workflow item) using the *OM Workflow Processing Monitoring*, ZOMWFMON

Purpose of Workflow

Workflow provides an electronic approval process for Position Actions at various levels:

- Division/Agency
- Funding
- OSBM

Workflow also gives users the ability to create, track and approve Workflow items.

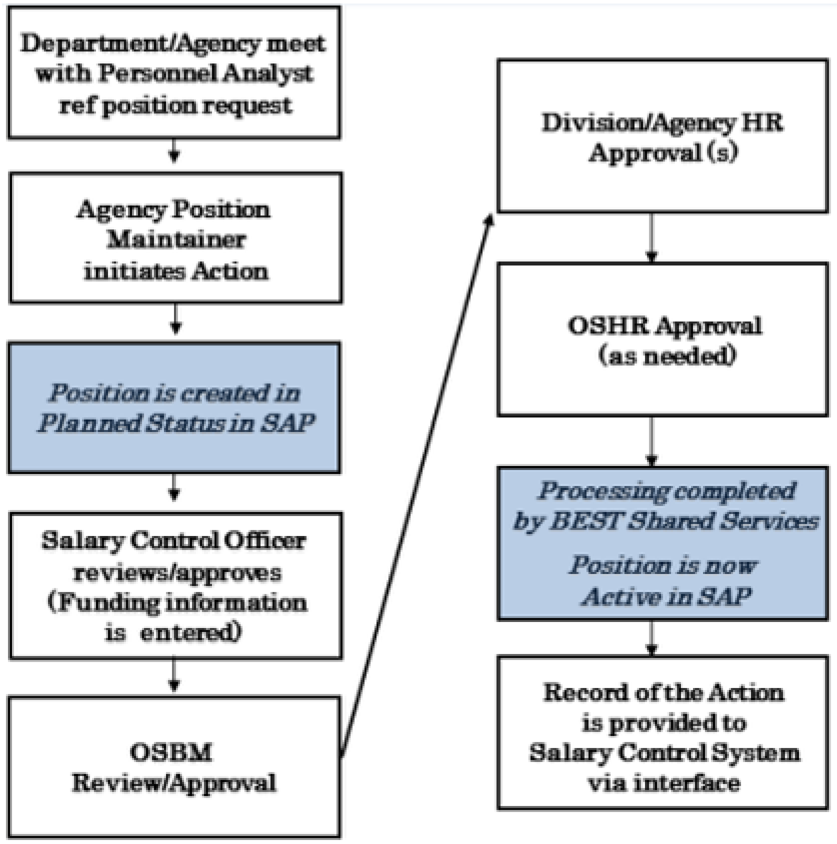
Key Terms

- **Action**: This term is used in OM to indicate a new record or change to an existing position.
- **Documents**: A documents option is contained in both the Inbox and Outbox. Documents are the HR/Payroll system's way of tracking all transactions that take place within the system. You will not use documents very often.
- **Initiator**: The OM user who enters the data for an OM Action.
- **Routing Tables**: OM has a custom table to hold the list of actions/reasons to support the approval process for positions. The table identifies which Action/Reason goes to which approval route.
- **PCR**: A Position Change Request (PCR) is a number assigned to each Workflow item. The PCR can be used to identify and track a Workflow item.
- **Workflow Tracker**: A link that will show you the name of the Step, Status, Result, Time & Agent for each Workflow item. The Workflow Tracker shows who initiated, who approved, and who the next approvers are in the process.
- **Workflow Header**: Displays the data that was entered by the Initiator for the Workflow item. The Workflow Header answers this question, "What data was used to execute this Workflow item?".
- **Workflow Log**: A more detailed view of the individual steps the document goes through within the Workflow process (detailed Workflow Tracker). The Workflow Log answers the question, "Who has the Workflow item in his/her inbox?".
- **Approver**: Several positions are assigned with approval status at various levels within the organization. The security access assigned to the position determines if the position holder has approval authority for OM. The authority to approve belongs to the position, not the person holding the position. When the person leaves the position, he or she will no longer have approval authority unless the new position has the authority.

  Generally, there are at least two Approvers assigned to each level in an agency or division so when the Initiator executes Workflow, the PCR is sent to the Inbox of all of the Approvers at that level. This allows the approval process to continue if one of the Approvers is out of the office for a period of time.

Organizational Management (OM) Workflow Process Flow

NOTE: *If at any point in the process the Action is rejected, Salary Control is not affected and the Position status will be changed to* ***Rejected*** *in the HR/Payroll system.*



All OM Position Actions are initiated in Workflow (WF). Approvers at any level can approve to the next level or return to the Initiator. The Initiator can make applicable changes and resubmit to begin the approval process over again, if possible.

Roles involved in Position Actions:

- Agency HR Personnel Analyst researches the Action with the appropriate manager.
- Agency HR personnel uses ZOMA069 to enter the required Position data and then initiates Workflow for approvals.
- Agency Salary Control Officer (Agency Position Funding Approver) enters cost distribution and salary and approves the Workflow or rejects it.
- The OSBM (Office of State Budget and Management) Position Funding Approver approves or rejects the Position Action (if applicable). OSBM approval is not required for temporary positions.
- Division Position approver approves or rejects the Position Action.
- Agency Position approver approves or rejects the Position Action.
- The OSHR Position approver (if applicable) approves or rejects Position Action.
- After final approval, BEST reviews and moves the status to active.

It should be noted that some Position changes can be made without Workflow such as:

- Position Working Title
- Position Type
- Position Address
- Cost Distribution changes and Budgeted Salary changes (Funding Approver role only)
- Time Settings
- Vacancy changes (to mark open for NeoGov)

HR/Payroll System Workflow Process

OM WORKFLOW PROCESS
• Notes and documents should be included/attached in the Services for Objects section of the PCR
• Funding Approval is the first approval level for most OM PCRs
• PCR #s begin with 5 (5000000000)
• After the PCR has been through the entire approval process it does not return to Initiator
• BEST completes the final step to activate OM actions
• One OM Action funds and creates new positions

Services for Objects

The Services for Objects option allows notes and attachments (Word, Excel, Notepad) to be included with the Workflow PCR. All Approvers at the next levels (unless marked private) can view the notes or attachments. Only the creator of the private note can view it.

OM Workflow Process

The Initiator (Agency) initiates the PCR (Position Change Request). BEST completes the last step and makes the action active in the system.

The Funding Approver is usually the first approval step for most OM PCRs.

Workflow Approver Relationships

The list below shows the different levels that an OM Action may be sent for approval. The OM Routing Table was set up to determine how the PCR is routed. You will see the following code acronyms when viewing the Workflow Tracker.

OM Workflow Approver Relationships
FA1 - Funding Approver
BA1 - OSBM Approver
DA1- Division Approver
AA1 - Agency Approver
OA1 - OSHR Approver
SOM - Shared Services OM Processor

Workflow - In Process

After an Initiator has created a PCR, but has not initiated Workflow, the status is **D** for created.

After an Initiator initiates Workflow, the status is updated to **N** for in process.

After an Approver approves the PCR, the status is set to **A** for approved and will remain at A for all approval levels unless an Approver returns (rejects), reserves, or cancels the PCR.

When an Approver returns (rejects) a PCR, the status is changed to **R** for rejected. The PCR is automatically sent back to the Inbox of the Initiator.

Once BEST Shared Services has completed the last step and the position is live in the system, the status changes to **M** for completed.

If the initiator cancels the action, the Workflow status will change to **C** for canceled.

PCR Troubleshooting

There are several reasons why a PCR may appear to be "lost." It is best practice to record the PCR number, date and position number (if applicable) to track a PCR later in case it is "lost."

1. If the Initiator merely saved the PCR and did not click the Initiate Workflow button, the PCR is not visible in their outbox. Therefore an Approver who is waiting to see the PCR in the Approver Inbox will not be able to see it in their inbox. The Initiator may choose Edit in the ZOMA069 - Position Action transaction.

2. The Initiator or Approver has incorrect security roles to process a PCR.

3. If a user is an Initiator as well as an Approver, it can sometimes be confusing. That is because the same PCR will leave the Inbox of the Initiator role and be sent to the Inbox of the Approver role (which to the employee is the same Inbox).

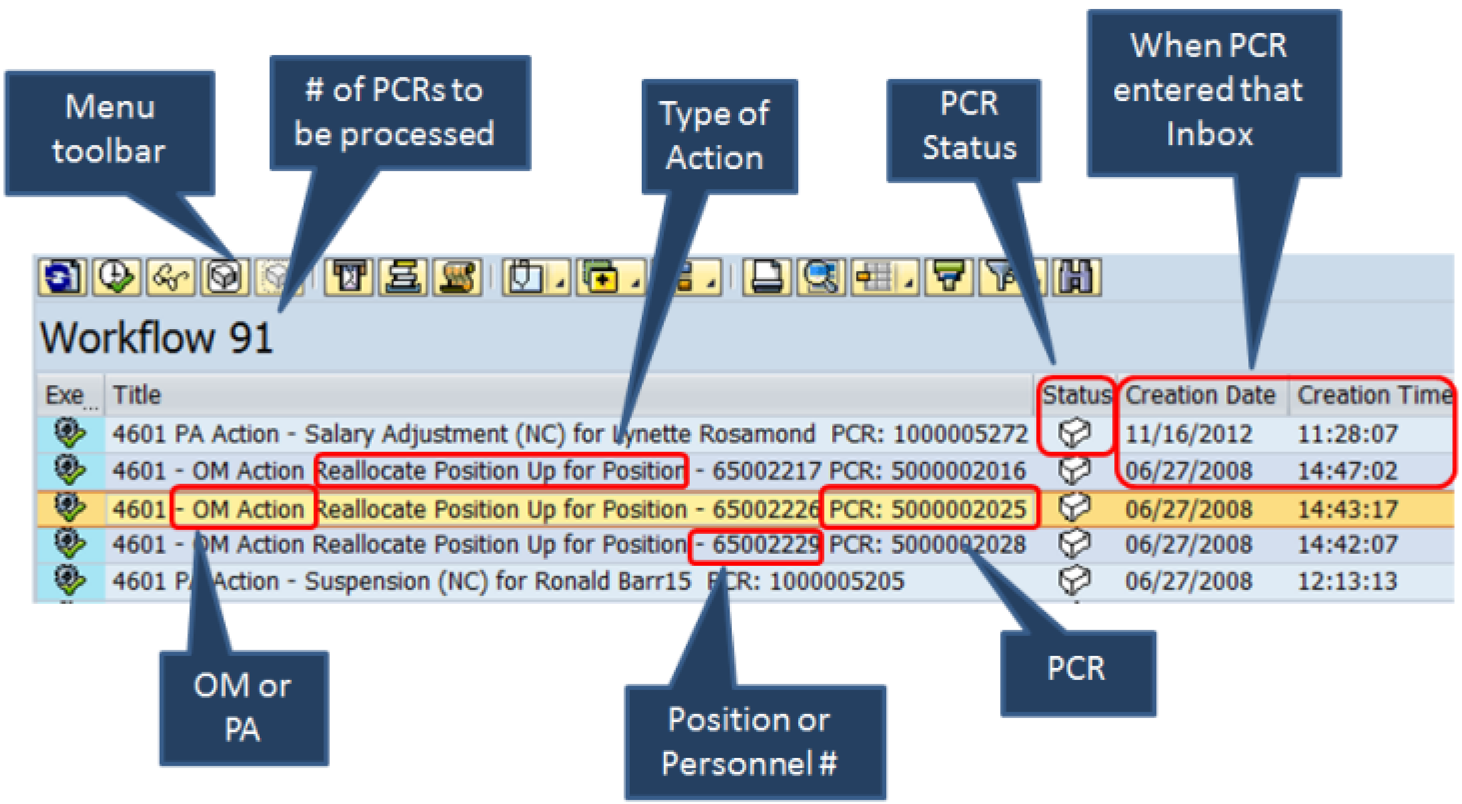
4. If a PCR/workflow item is "touched" more than 20 times or too quickly by an approver, it can disappear from the workflow process automatically. Contact BEST Shared Services to confirm. A new PCR may need to be created.

KNOWLEDGE CHECK

Answer	Question
	1. The ___ is the OM user who enters the data for an OM Action.
	2. The ___ shows who initiated, who approved and who the next approvers are in the process.
	3. The ___ answers the question "Who has the Workflow item in their inbox?".
	4. The ___ can be used to identify and track a Workflow item.
	5. Workflow approval security is assigned to the ___.
	6. The Funding approver's place in the Workflow approval process in OM is usually ___.
	7. In OM, ___ completes the OM Action and makes the action active in the system.

* *

The Workflow Inbox



* *

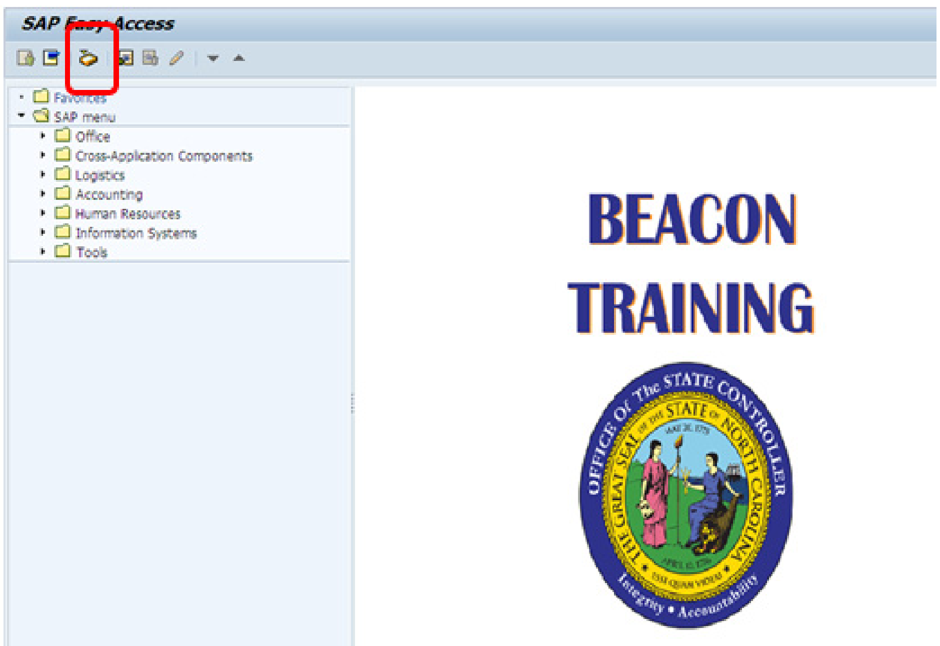
EXERCISE 6.1: Workflow Overview and Navigation

SCENARIO
Follow with your instructor as he/she directs you through the navigation and discovery of the Workflow Inbox.

Instructions

You are currently on the SAP Easy Access screen.

Accessing the Workflow Inbox (SBWP)



An Initiator accesses the Workflow PCRs that have been sent for him or her to take Action on via the Workflow option in the Inbox.

The Inbox is accessed either from the Easy Access screen using the Business Workplace button  or by entering SBWP in the Command field.

1. Click the **SBWP**  button to access the SAP Business Workplace.

2. Click the node in front of **Outbox** .

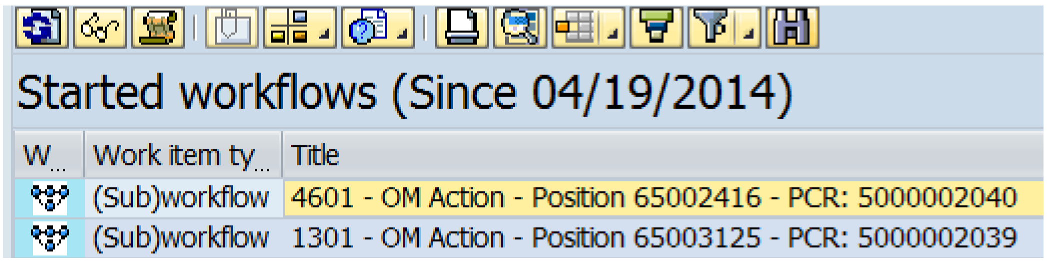
3. Click the **Started workflows** folder.

4. Pull out your Transaction log and locate the PCR number for Exercise 4.1.

5. Look through the PCRs in your Outbox and find the one for OM Action that matches the Reallocation Up.

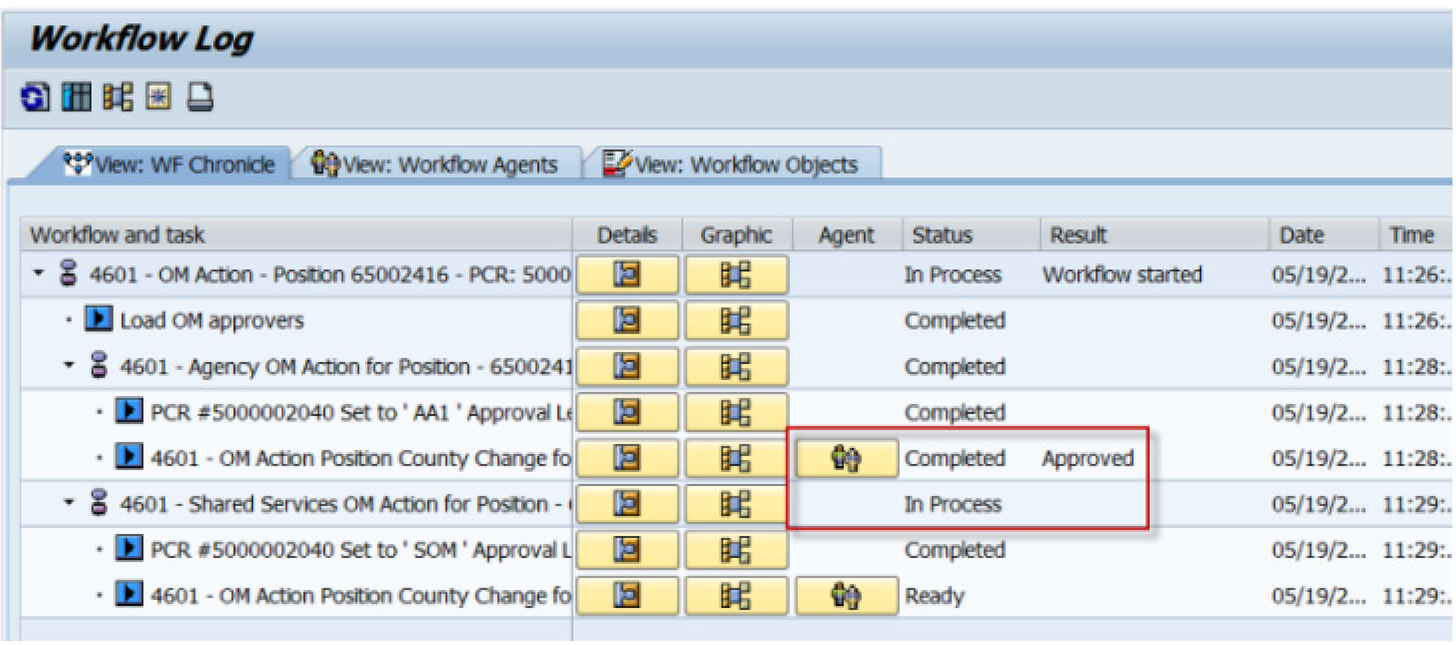
6. Use the **Find** button to aid in your search. (Follow your instructor's direction for this.)

NOTE: The **Find** button only searches forward from the selected PCR. To search the entire folder of PCRs, click the first listing in the Workflow Inbox and then click Find.



7. If the PCR for the Reallocation Up is not selected, SINGLE-click on it to select it.

8. Click on the **Workflow Log** button on the menu to display the workflow log and view potential Approvers who are next in line for the PCR.

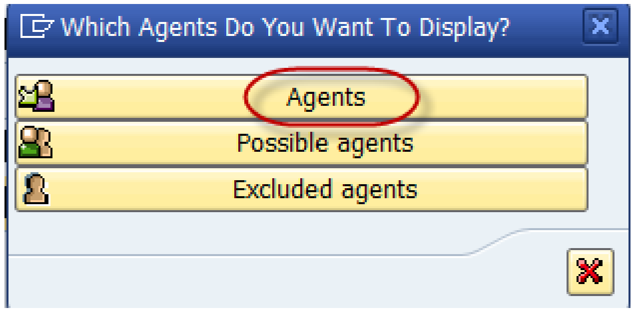


9. Click the **Agents** button to view the list of Approvers for the <u>READY</u> status.

The Workflow Log is a document within Workflow that contains the Step, Status, Result, Time and Agent. The Workflow Log answers the question, "Who has the Workflow item in his/her Inbox?".

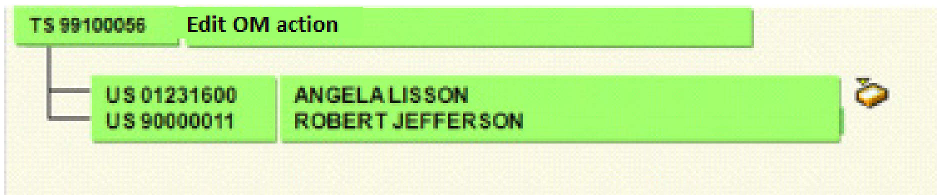
After you select the Log option, the next screen displays the various results for each step. In addition, the Agents option is displayed. You can click the Agents icon to view the list of the Approvers for that step.

Once an approver approves a PCR, you might want to obtain a list of possible approvers.



10. Click the **Possible agents** button on the pop-up box to view the possible approvers available to approve this workflow.

The Workflow Log example illustrated below *(not the same as on your screen)* indicates that this sample Work Item has two possible Approvers at this level: Angela Lisson or Robert Jefferson.

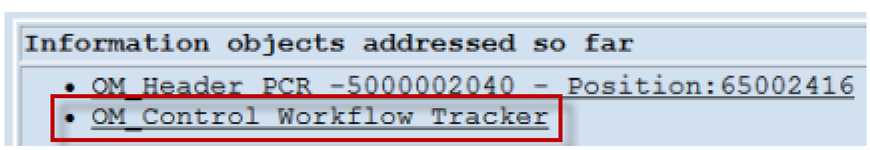


Note the Inbox button next to Angela Lisson. That indicates that, if the PCR was in the approval process, Angela Lisson would be the Approver who has it in her inbox.

11. Click the **X** at the upper right corner of the pop-up box to close the box.

12. Close the Click the **Back** button to return to the Workflow inbox.

13. There is a area at the bottom of your Outbox > Started workflows folder named *Current data for started workflows*. Use the scroll bar to the right of the section and scroll down to towards the bottom of your Outbox until you see a box labeled: **Information objects addressed so far**.



14. **SINGLE** - Click the **OM Control Workflow Tracker**.

(Screen Captures for rest of exercise will differ from your screen)

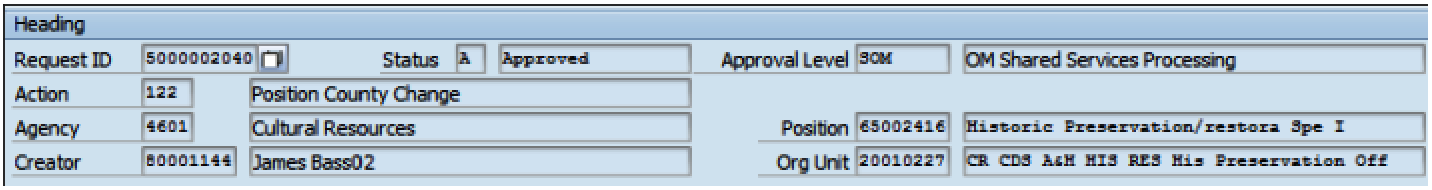
Heading

Request ID 5000002040 Status A Approved Approval Level 30M OM Shared Services Processing
Action 122 Position County Change
Agency 4601 Cultural Resources Position 65002416 Historic Preservation/restora Spe I
Creator 80001144 James Bass02 Org Unit 20010227 CR CDS A&H HIS RES His Preservation Off

S...	Role	Mand	Ptype	Atype	Agent ID	Name / Description	Act	Desc	C...	Actual	Name	ACT DATE	ACT T
1			P	P	80001144	James Bass02	P	Processed		80001144	James Bass02	05/19/2014	11:2
100	AA1	X	A	P	80000023	Priscilla Branco	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001043	Carolyn Bracy01	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001044	Carolyn Bracy02	A	Approved		80001044	Carolyn Bracy02	05/19/2014	11:2
100	AA1	X	A	P	80001045	Carolyn Bracy03	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001046	Carolyn Bracy04	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001047	Carolyn Bracy05	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001048	Carolyn Bracy06	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001049	Carolyn Bracy07	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001050	Carolyn Bracy08	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001051	Carolyn Bracy09	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001052	Carolyn Bracy10	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001053	Carolyn Bracy11	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001054	Carolyn Bracy12	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001055	Carolyn Bracy13	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001056	Carolyn Bracy14	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001057	Carolyn Bracy15	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001058	Carolyn Bracy16	O	N/A				05/19/2014	11:2
100	AA1	X	A	P	80001059	Carolyn Bracy17	O	N/A				05/19/2014	11:2

The Workflow Tracker is a link in the bottom of the Outbox screen (you may have to scroll in order to see it). Using Workflow Tracker, you can see which Approver has processed the PCR, the action the Approver took, and where the PCR is being routed next.

Additional Resources
You can find several additional support materials about OM PCRs on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aid: *Organization Management > Job Aids* • How to Locate/Monitor an OM PCR



The Header section of the Tracker will show, at a minimum, the following fields:

- Request ID (PCR Number)
- Action type (code and name)
- Status (the overall status of the work item
- Creator (Initiator)

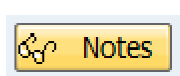
In Addition the header will include specific fields pertinent to the OM Action (like position name).

The Detail section of the Tracker will list these attributes:

- Sequence (line item sequence)
- Role represents the approver relationship
  - — **FA1** Funding Approver
  - — **AA1** Agency Approver
  - — **DA1** Division Approver
  - — **OA1** OSHR
  - — **SOM** BEST Shared Services
  - — **BA1** OSBM
- An **X** in the Mandatory column indicates that the approval of the specific Approver is required.
- Ptype is used to signify the Processor (P) and Approvers (A)
- Agent ID represents the Personnel number of the Approver
- Name/Description lists the name of the Employee
- Act/Desc holds value (P) Processed
  - — **A** = approved
  - — **R** = rejected
  - — **P** = processed
- See the example below to view what a Rejected PCR looks like on the Tracker.

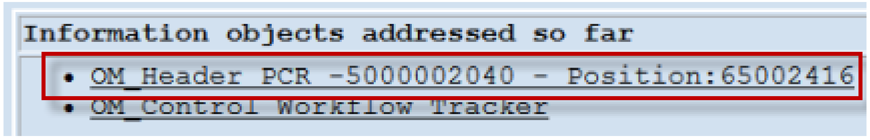
200	FA1	X	A	P	80001064	Earl Gutierrez02	R	Rejected

- An **X** in the Cmnt column will indicate if a rejection note has been created for the Action.
- To see the comment, highlight the line and click the Notes icon (eyeglasses).



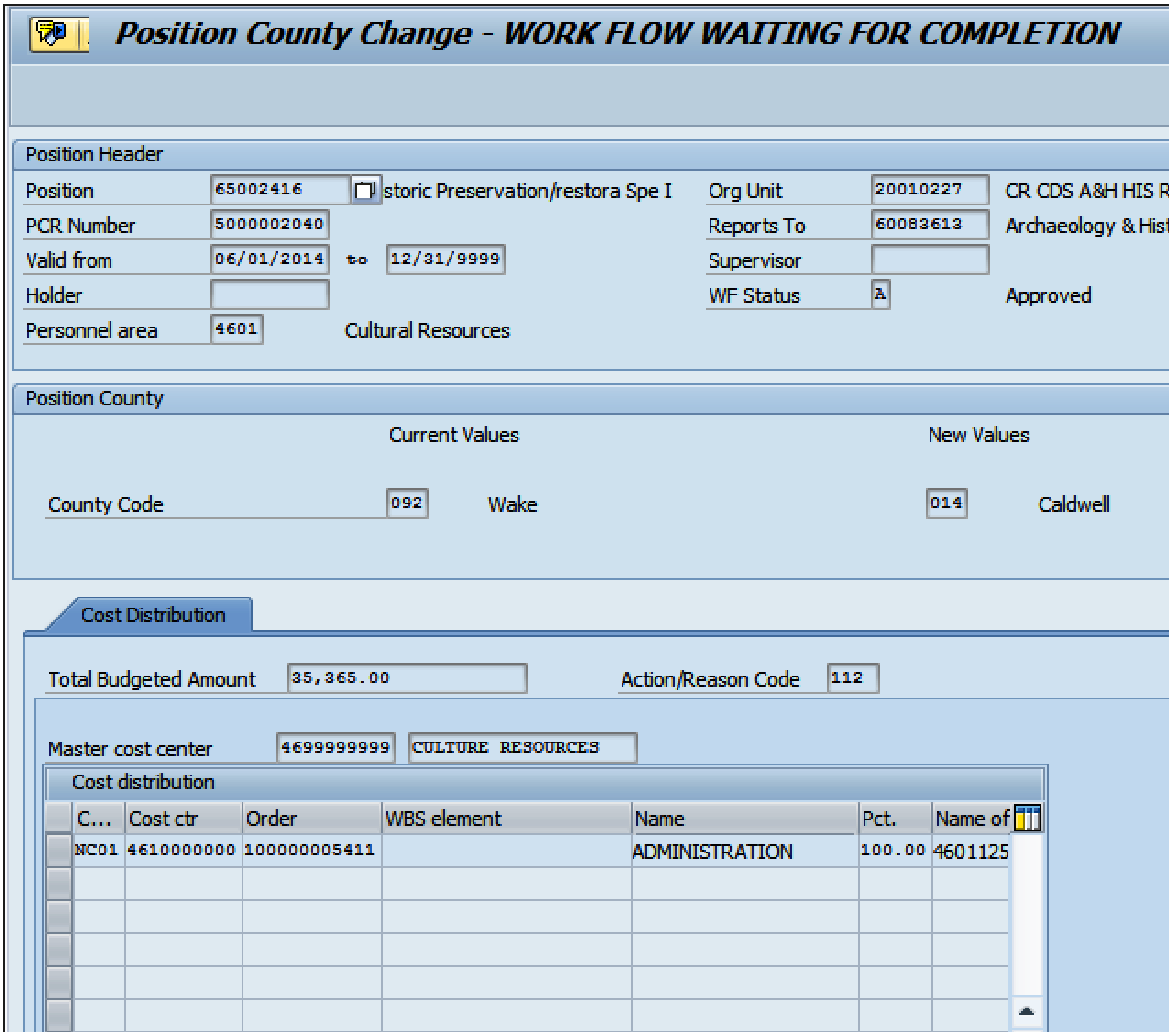
- Actual/Name is the Initiator's Personnel number and name.

15. Click the **Back** button to return to the Workflow Outbox.



16. SINGLE-click the **OM Header PCR** (ZOMA069) at the bottom section of the Workflow Inbox (just above the Workflow Tracker).

The Position Action Request screen you completed to initiate the Workflow Process is now displayed.



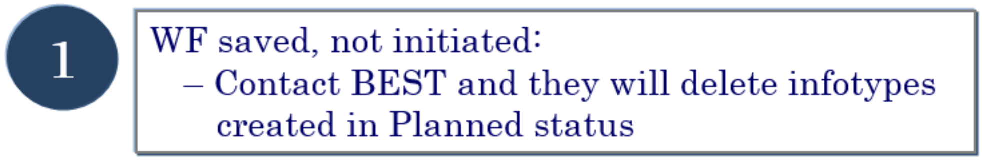
By using the Header, you can also access the Services for Object button to see any notes or attachments that were sent with the PCR.

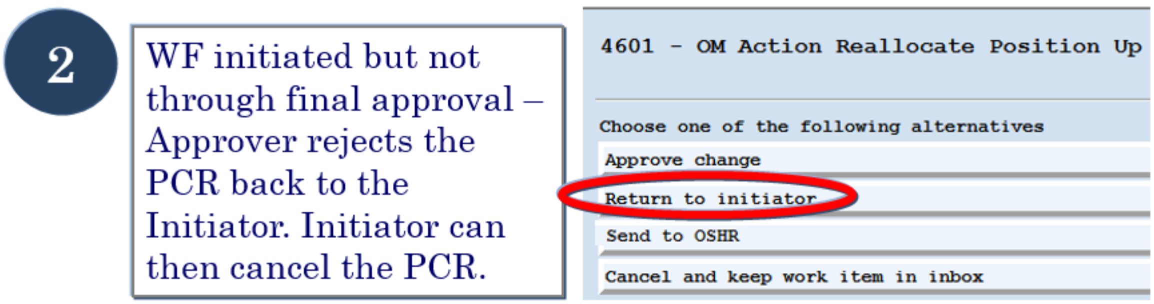
17. Click the **Back** button to return to the Workflow Outbox.

This exercise is complete.

* *

Canceling an OM PCR (Initiator)





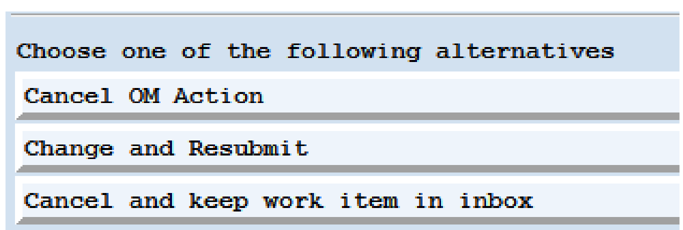
The method you use to delete a PCR depends upon where it is in the process.

1. **If the Workflow is saved but not initiated:**

   If OM Workflow was saved but not initiated, contact BEST and they will have the PCR set to Canceled and delete the infotypes that have been created in Planned status.

2. **You initiated Workflow but the PCR has not reached final approval:**

   Contact the Approver and request that the PCR be returned (rejected) to you. You can then Execute the PCR. When the Decision Step in Workflow screen displays, click the Cancel PCR option (illustrated below). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it has been canceled. Once BEST Shared Services approves the change, the PCR status will be set to Complete. All infotypes move to Rejected status. (Basically you are approving the cancellation of the PCR.).



KNOWLEDGE CHECK

Answer	Question
	1. On the Workflow Tracker, an X in the Cmnt column indicates whether a ___ has been created for the Action.
	2. Use the ___ to see which Approver has put the PCR on reserve.
	3. Click the ___ to access the Action screen to view the data entered for the PCR.
	4. If the PCR is touched more than ___ times, this places it at risk for being lost.

OM Routing Table

Action	Action Description
100	Create New Position

Agency Position Funding Approver
Office of State Budget Management (OSBM)
Agency Division Approver (optional)
Agency OM Position Approver
Office of State Human Resources (OSHR)… if required
BEST Shared Services

The New Position OM Action requires OSBM Approval.

BEST Shared Services completes the actions as a final step and ensures proper recording onto positions and their histories.

Action	Action Description
103	Reallocate Position Up
104	Reallocate Position Down
105	Reallocate Position Horizontal
106	Position Adjustment from Authorization
107	Reallocate Position Differential
108	Remove Position Differential
113	Position Transfer
115	Position Hours Change
116	Position Employee Group/Subgroup Change
118	Position Comp Level Chg

Agency Position Funding Approver
Agency Division Approver (optional)
Agency OM Position Approver
OSHR … if required
BEST Shared Services

These Actions shown above do not require OSBM approval.

BEST Shared Services completes these Position Actions in a similar manner as new Position Actions.

🗁 **NOTE**: Abolish Position currently requires a ticket entered with BEST Shared Services for processing.

Workflow Report Overview

There are times when you need to find the details of a Workflow item you previously submitted. There are two transactions you can use to locate those details. Those reports are listed below:

- OM Workflow Report - ZOM0178

  Use a position number to determine its PCR

- OM Workflow Process Monitoring - ZOMWFMON

  Use for PCR selection

A Job Aid on the OSC Training HELP website (How to Locate an OM PCR) covers how to access the transactions above and what search criteria is necessary. It also includes steps detailing how to create report variants. Go to the *OM folder > Job Aids folder > How to Locate an OM PCR.*

The following exercises will walk you through how to access and view the workflow detail information.

The Workflow Report allows Approver and Managers to see at a glance the:

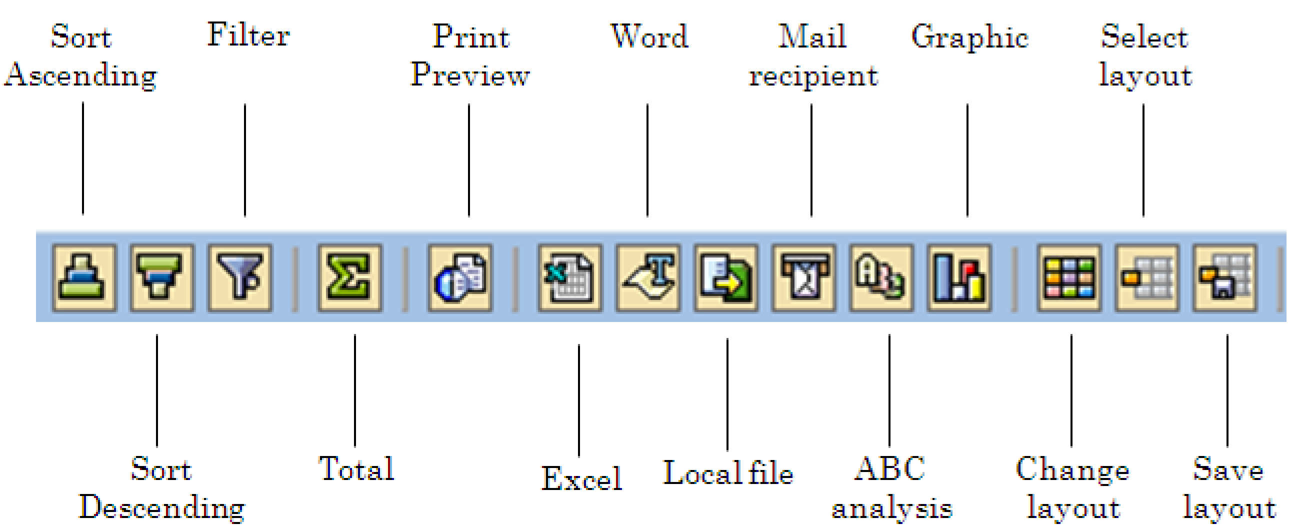
- Type of Actions created in the Agency
- Actions that are awaiting approval and at which approval level
- Length of time an approval has been waiting
- Transaction codes:
  - ZOM0178 (OM reports)
  - ZOMWFMON (OM Workflow Process Monitoring)
- Reports can be run based on security by:
  - Agency
  - Groups
  - Individual PCR
- BI Reports for OM
  - Access the **Workflow Report Job Aid** online at: http://www.osc.nc.gov/training/osctd/help/Purporting/job%20Aids.html

Searching for PCRs

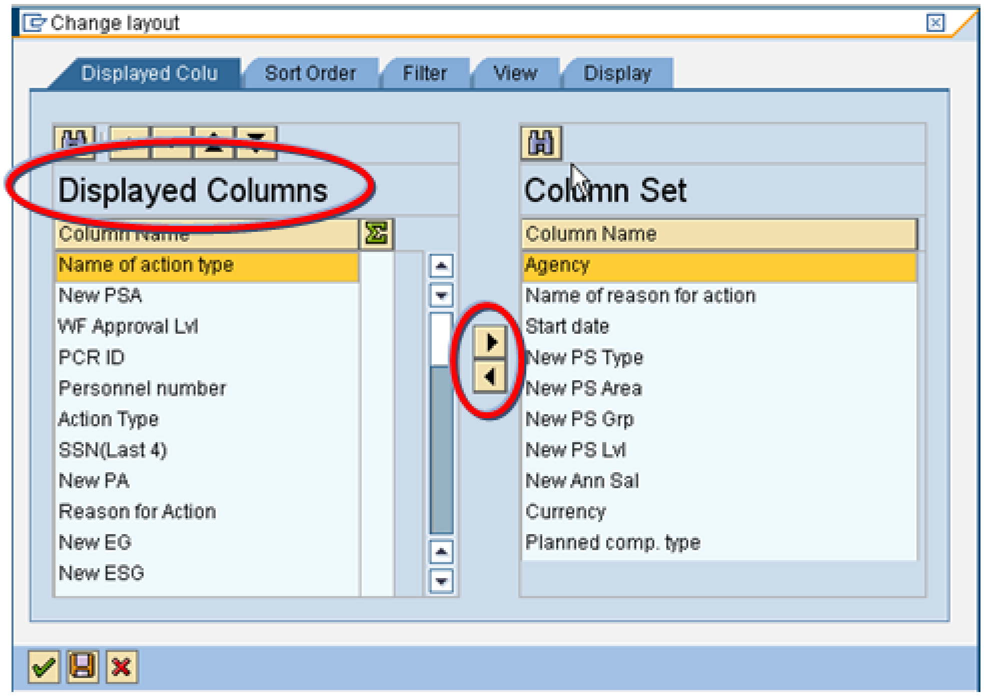
When using Workflow reports, results can be narrowed by utilizing some or all of the following criteria:

- Position ID
- Action
- Personnel area
- PCR IDPCR Workflow Approval level

Report Options



Modify Layout



- Use the Change Layout option to remove fields that you do not want to display from left to right.
- Drag and drop columns on the report to change the order.

Save Layout

- Save layout field
  — Short name (begin with Z for user-specific)
- Name
  — Longer description for the layout
- User-specific
  — Only you have access
- Default setting
  — Indicates you want the layout to display each time the report is run

USE A LAYOUT

- Complete search criteria fields for the report.
- Click the Select layout option.

- - OR - -

- From the menu: **Settings > Layout > Choose**.
- Select the applicable layout option.
- Execute the report.

* *

EXERCISE 6.2: Execute the Workflow Report (OM)

SCENARIO
You need to find the PCR information for a position you created earlier. You can use the ZOM0178 - OM Workflow Report to retrieve that information. Use your Transaction Log to locate the position number you created in Exercise 2.2.

Instructions

For more information about this transaction, access the Training HELP website and go to the *How to Locate a PCR* Job Aid (OM folder > Job Aids folder).

1. Enter transaction code **ZOM0178**, OM Workflow Report, in the Command field and then click **Enter** to display the initial screen for the transaction.
2. Enter the position number from Exercise 2.2 in the Position ID field.
3. Click **Execute**. It takes some time to run the report. When the run is completed, the OM Workflow PCR List screen will be displayed.
4. Scroll to the right to see all the information available. Listen to your instructor as they explain some of the features of this report.
5. Click the **Change Layout** button and move items on the left Columns Displayed panel to the Column Set on the right until only those in the list below are visible in the Columns Displayed:
   - Agency
   - Creator ID
   - Effective Date
   - Object ID
   - PCR Change Date
   - PCR Change Time
   - PCR WF Approval Level
   - WF Status

6. Click the **green check** to close the Change Layout pop-up.

7. Assume you have decided to move the order of the columns. Drag and drop the columns so that they display left to right as shown below:

   - PCR ID
   - Action
   - Action text
   - Position Name
   - Position Title
   - Org Unit
   - Personnel Area
   - PCR Creation Date
   - WF Status
   - WF Approval Lvl

8. Click the **Save Layout** button (next to last button on toolbar).

9. In the Save layout field, enter: **ZxxTrng** (where xx = your initials).

   NOTE: When you use the User-specific button, you must begin the field with the letter Z.

10. In the Name field enter **XX's WF Report** (where XX = your first name).

11. Click the **User-specific** checkbox. This indicates that the layout is restricted to your user ID. If you do not select User-specific, the layout can be used and modified by anyone with the security to run the report.

12. Click the green check. A message displays indicating that the layout is saved.

13. Click the **Back** button to return to the Report criteria screen.

Now save as a variant for the rest of your team to use.

14. On the Menu at the top of the screen, click **Goto > Variants > Save as variant**. The Variant Attributes screen is displayed.

15. In the Variant Name field, enter **XX WF Rpt** (where xx = your initials).

16. In the Descript. field, enter **XX's WF Rpt (PCR List)** (where XX = your first name) to identify the purpose of the report.

17. **Save** your variant.

18. Click the **Back** button to return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 6.3: Use a Saved Layout to Run the Workflow Report

SCENARIO
You need to check on the WF status and approval level for the New Position Action you entered this morning. You will apply the variant you created in Exercise 6.2 and the run the report.

1. Enter transaction code **ZOM0178**, in the Command field and click **Enter** to access the OM Workflow Report.
2. Click the **Get Variant** button on the toolbar.

   NOTE: If you forget to select the variant prior to executing the report, you can still apply the variant after you are in the report by clicking the Select layout button and choosing the applicable saved layout.

3. In the pop-up box, double-click on the Variant you just created to select it and apply it.
4. Click the **Execute** button.

   The system will populate your report with the fields you set up when you created the variant.

   Modify and enter data as needed prior to executing the report.

5. Click the **Back** button until you return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 6.4: OM Workflow Process Monitoring Report

SCENARIO
You need to search for information on a PCR you created earlier today. You can use the ZOMWFMON - OM Workflow Process Monitoring transaction to retrieve that information. Use your Transaction Log to locate the position action number and effective date you created in Exercise 4.1.

1. Enter transaction code **ZOMWFMON**, OM Workflow Process Monitoring, in the Command field and then click **Enter** to display the initial screen for the transaction.
2. Enter the **PCR#** from Exercise 4.1 (103) in the Action field.
3. Click **Execute**. The OM Workflow Process Monitoring List screen is displayed.

4. Scroll to the right to see all the information available. Listen to your instructor as they explain some of the features of this report.

5. Click **Back** to return to the OM Workflow Process Monitoring screen.

6. Click **Back** again to return to the SAP Easy Access Screen.

This exercise is complete.

* *

SUMMARY

In this lesson you learned to:

- Display status information for a position action (Workflow item) using the *OM Workflow Report*, ZOM0178
- Display status information for a position action (Workflow item) using the *OM Workflow Processing Monitoring*, ZOMWFMON

Job Information

Lesson 7 Objectives

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

- Search job objects to be able to determine a job to use as a template in the creation of a new position.

Job Family / Branch / Job Relationships

Job Family

Job Family = Tree

Job Branch = Tree branch

Jobs = Leaves on a branch

Job Family – Major groupings of Jobs that represent general fields of work. The State of North Carolina has defined these ten Job families:

— Administrative and Managerial
— Information Technology
— Law Enforcement and Public Safety
— Information and Education
— Human Services
— Medical and Health
— Institutional Services
— Operations and Skilled Trades
— Engineering and Architecture
— Natural Resources and Scientific

A Job Family is further divided into Job Branches.

— The SAP object code for a Job Family is "**JF**".

— The eight-digit SAP object ID number range for Job Family objects is **90000000 through 91999999**.

🗁 Use ERP report S_AHR_61016527 - Existing Objects, Object Type - JF to display Job Families.

The Job Families defined by the Office of State Human Resources are listed below:

— **Administration and Management**

— Engineering and Architecture

— Human Services

— Information and Education

— Information Technology

— Institutional Services

— Law Enforcement and Public Safety

— Medical Health

— Natural Resources and Scientific

— Operations and Trades

🗁 We will use the *Administration and Management* Job Family in our example.

The infotypes associated with the Job Family are listed below:

Infotype Name	Infotype #
Object	1000
Relationships	1001
Description	1002
Job Family	5070

🗁 Take a moment to review the OM Infotypes reference. It contains a complete description of all the OM infotypes.

Job Branch

Job Family = Tree

Job Branch = Tree branch

Jobs = Leaves on a branch

Job Branch - A subset of a Job Family containing banded classifications or graded classifications with similar functions, competencies and training and experience requirements.

— A Job Branch is further divided into Jobs.

— The SAP object code for a Job Branch is **30**.

— The eight-digit SAP object ID number range for Job Branch objects is **80000000 through 81999999**.

🗁 Use ERP report S_AHR_61016527 - Existing Objects, Object Type - 30 to display Job Branches.

A portion of the Job Branches defined by the Office of State Human Resources are listed below:

— Accounting

— Administrative Support

— Auditing

— Budgeting

— Business Management

— Economic Development

— Executive

— Exempt

— Financial Analysis

— Human Resources

— **Legal**

— Planning

— Program Management

— Social Research

— Support Services

🗁 We will use the *Legal* Job Branch in our example.

The infotypes associated with the Job Branch are listed below:

Infotype Name	Infotype #
Object	1000
Relationships	1001

🗁 Take a moment to review the OM Infotypes reference. It contains a complete description of all the OM infotypes.

🗁 The infotypes listed above are required for a position to exist in the system.

Jobs

Job Family = Tree

Job Branch = Tree branch

Jobs = Leaves on a branch

Job - The set of duties and the associated competencies assigned to an individual position.

The SAP object code for a Job is **C**.

The eight-digit SAP object ID number range for Job objects is **30000000 through 31999999**.

🗁 Use ERP report S_AHR_61016497 - Existing Jobs to display Jobs.

A portion of the Jobs defined by the Office of State Human Resources are listed below:

- Agency Legal Specialist I
- Agency Legal Specialist II
- Agency Legal Specialist III
- Attorney I
- Attorney II
- Attorney III
- Attorney IV
- **Paralegal I**
- Paralegal II
- Paralegal III
- Exec Legal Specialist - banking
- Exec Legal Specialist - agriculture
- Attorney Supervisor I
- Attorney Supervisor II

— Deputy Attorney General

— Chief Deputy Attorney General

— Appeals Referee

— Appeals Referee Chief

— Appeals Referee Assistant Chief

— Deputy Commissioner Industrial Comm

— Attorney General

— Asst to the President for Legal Affairs

— Assistant Sec - Legal Affairs (DOC)

— Attorney

— General Counsel - OSHA Review Board

— Chief Legal Counsel

— DENR Legal Advisor

— Agency General Counsel I

— Agency General Counsel II

— Information Protection Consultant

🗁 We will use the *Paralegal I* Job in our example.

The infotypes associated with the Job are listed below:

Infotype Name	Infotype #
Object	1000
Relationships	1001
Planned Compensation	1005
US Job Attributes	1610
Job Schematic Data	9031

* *

EXERCISE 6.3: Display Job, Job Branch, and Job Family Infotypes

NOTE: You will **not** perform this exercise in class. These steps are listed for your convenience.

SCENARIO
You want to view the jobs (classes) that are included in the Legal job branch which is part of the Administration and Management job family. You also need to verify the pay grade and midpoint for the Paralegal position. Use the RE_RHDESC10, Display Infotypes transaction to inquire on these objects.

Instructions

1. Access the **RE_RHDESC10**, Display Infotypes transaction. The *Display Infotypes of an Objects* screen is displayed.

2. Complete the following fields:

Field	Value
Plan version	**01** for Current Plan
Object type	**30** for Job Branch
Object ID	**80000008**
Object status	**1** for Active
Evaluation Path (Structure Parameters)	**Z30_C** (to identify the search parameter requesting all the Job classes assigned to the Legal Job Branch)

3. Click **Enter** to continue.

4. Click the **Execute** button to display the list of records in the SAP database for the selected object.

5. Click on the **Paralegal I** (30000744) job class to highlight the text.

6. Click the Display Object Infotypes to display the Object.

7. Click the **gray selector** button to the left of the infotype record to select it.

8. Click **Object Description** to display the Object infotypes available for the Paralegal I job class.

9. Click the **gray selector** button to the left of the Relationship infotype record to select it.

10. Once the **infotype record** you wish to view is selected, click the **Overview** button to view the infotype screen. For this exercise the List Display Relationship screen displays.

11. Click the **gray selector** button to the left of the record you wish to view.

12. Click the **Choose** icon.

13. Click the **Next record** button to scroll through each job record.

14. To see a list of all jobs in the job branch, perform these actions:

    - Click the **Back** button to return to the previous screen which is the Display Object screen.

    - Select the **Relationships** object.

    - Click the **Overview** button to view the List Display Relationships screen which lists the job family and all jobs associated with the Legal job branch.

15. Click the **Back** button until you return to the Display Infotypes of an Object data entry screen.

16. Repeat the appropriate steps above and display the infotypes for the Paralegal job.

    Hint: You will need to change the Object type field to C for job and search for the object ID for the paralegal job. You will also need to delete the evaluation path code.

17. For further practice, view the job infotypes.

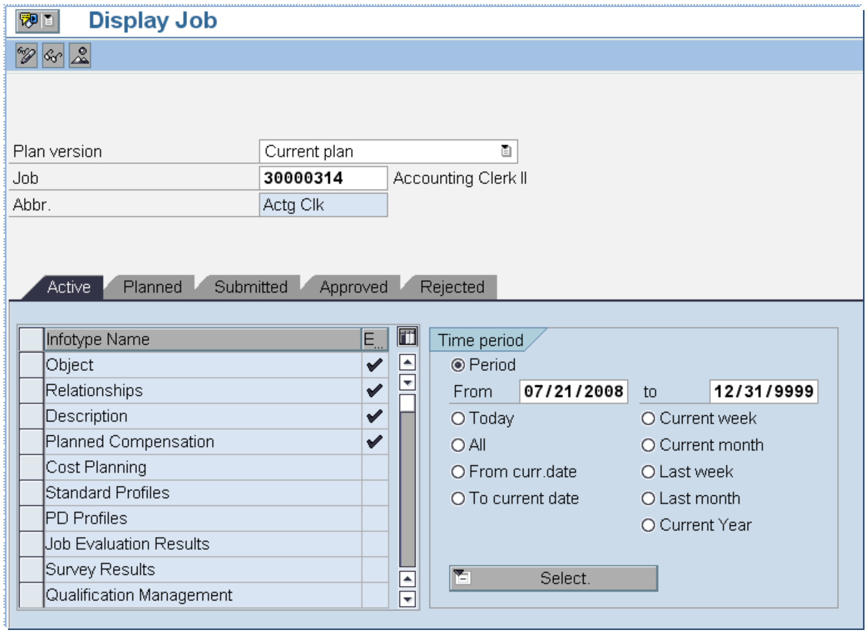
    - Object
    - Relationships
      - Job Family
      - Job Branch
    - Description
    - Planned Compensation

18. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

PO03D - Display Job



The PO03D infotype displays the following information regarding a particular job classification.

- Short / Long name of Job
- Relationships
- Job Specifications (Description)
- Competencies / Knowledge, Skills, & Abilities
- Pay grade / Salary
- Training & Experience Requirements
- Graded / Banded / Level
- EEO Category

Object Statuses

When you initiate a position action, you will be working in planned status. The Position remains in planned status throughout the approval process. Once all approvals have been obtained, BEST Shared Services changes the status to active.

- Active Status Positions:
  - — Display in Organizational Structure during infotype (Personnel Administration) and in reports.
  - — Can be filled by employees.
  - — Is the default status for the majority of Positions.
- Planned Status Positions:
  - — Do not display on Organizational Structure in the Display Organization and Staffing transaction, PPOSE or in OrgPlus.
  - — Do not display in standard reports for active Positions.

- — Cannot hold employees.
- — Are Positions that require approval or are approved but not made active by BEST Shared Services.
- — Must be changed to “Active” status by BEST Shared Services when approved or ready to fill.

- Rejected Status Positions:
  - — When a PCR is canceled in Workflow, the position infotypes are moved to rejected status.

🗁 **NOTE**: The Submitted and Approved statuses are not used by OSC HR/Payroll.

SUMMARY

In this lesson you learned to:

- Search job objects to be able to determine a job to use as a template in the creation of a new position.

Course Review

Course Objectives

In this course you learned to:

- Perform position actions using the *Position Action* transaction, *ZOMA069.*
- Display position actions using the *Display Position* transaction, *PO13D.*
- Display position data in planned status using the Display *Position* transaction, *PO13D.*
- Search for the status of a position action using the *Display Position* transaction, *PO13D.*
- Explain the OM Workflow process
- Display Workflow information using the *Workflow Monitoring* report transaction, *ZOMWFMON* and the *OM Workflow Process Monitoring* report transaction, *ZOM0178.*

Next Steps

- Monitor the HR/Payroll System communication
  - — BEST Shared Services web site (especially the Updates tab)
    URL: http://www.osc.nc.gov/BEST/index.html
  - — BEACON Training website: **What's New** link
    URL: http://www.osc.nc.gov/beacon/training/whats_new.html
- Review conceptual materials
- Access the Training HELP site

  URL: http://www.osc.nc.gov/training/osctd/help
- Practice what you've learned

  URL: http://mybeacon.nc.gov
  - — Client 899
  - — Use your current NCID user name and password

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?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed on line through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your evaluation of today's class in the Learning Management System (LMS).

CONGRATULATIONS!

You've completed the course!

OM210 Transaction Log

EX #	Exercise Title	Position #	PCR #	Eff. Date
2.2	Creating New Full-Time Banded Position			
2.4	Create New Part-Time Graded Position			
2.6	Create New Part-Time Banded Position			
4.1	Reallocate Position Up			
4.2	Reallocate Position Down			
5.1	Transfer a Position within the Agency			
5.2	Change EE Group / Subgroup for a Position			
5.3	Change the County Assignment for a Position			
5.4	Change the Working Title of a Position			
5.5	Create a Position Vacancy			
5.6	Create a Full-Time Banded Position			

OM200 Class Review

	1.	Describes the general (generic) classification of functions and duties that are identical across the State.	**A**	Basic
	2.	Represents a set of tasks performed by a person	**B**	BI / BOBJ
	3.	The field that defines the relationship of the employee to the State	**C**	Chief
	4.	The system that generates the Personnel number for an employee	**D**	Company Code
	5.	The name of the first tab in the Org Unit display section on PPOSE	**E**	Eight
	6.	How OM objects are linked?	**F**	Employee Group
	7.	Functional unit of the State of NC	**G**	Enterprise
	8.	How the position holder obtains their assignment from the position	**H**	Inheritance
	9.	Manages the org unit and any subordinate org units	**I**	Job
	10.	Major screen used to review org units and positions within an org unit	**J**	Object Manager
	11.	The number that the SAP object for Org Unit begins with	**K**	Orbit
	12.	How position numbers are assigned by the system	**L**	Org Unit
	13.	Contains the Search Area and the Selection Area on the PPOSE screen	**M**	OSHR
	14.	Highest level of the org structure	**N**	Position
	15.	Who defines jobs	**O**	PPOSE
	16.	What allows us to see or not see certain data in the system	**P**	Relationships
	17.	Where customized reports are available in the system	**Q**	Security
	18.	The legal and fiscal structure for the State of NC	**R**	Sequentially
	19.	How many digits long most SAP objects are	**S**	Six
	20.	The position SAP Object number starts with this number	**T**	Two