

OSC TRAINING

OM200

Developing Guardians of North Carolina's Data

NORTH CAROLINA OFFICE OF THE STATE CONTROLLER

Updated 7/1/22

North Carolina Office of the State Controller

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INTRODUCTION

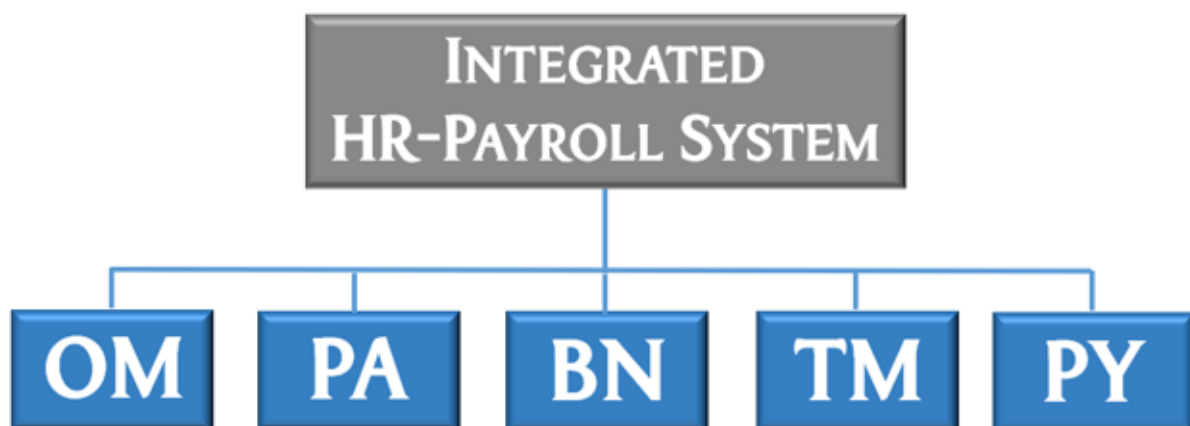
Overview

Welcome to the Integrated HR-Payroll System Organizational Management Overview training. The Organizational Management (OM) module is used to define and maintain org units, job classes, positions, and persons occupying positions. It is based on a concept of creating and linking objects. This in turn establishes relationships and inheritance of attributes.

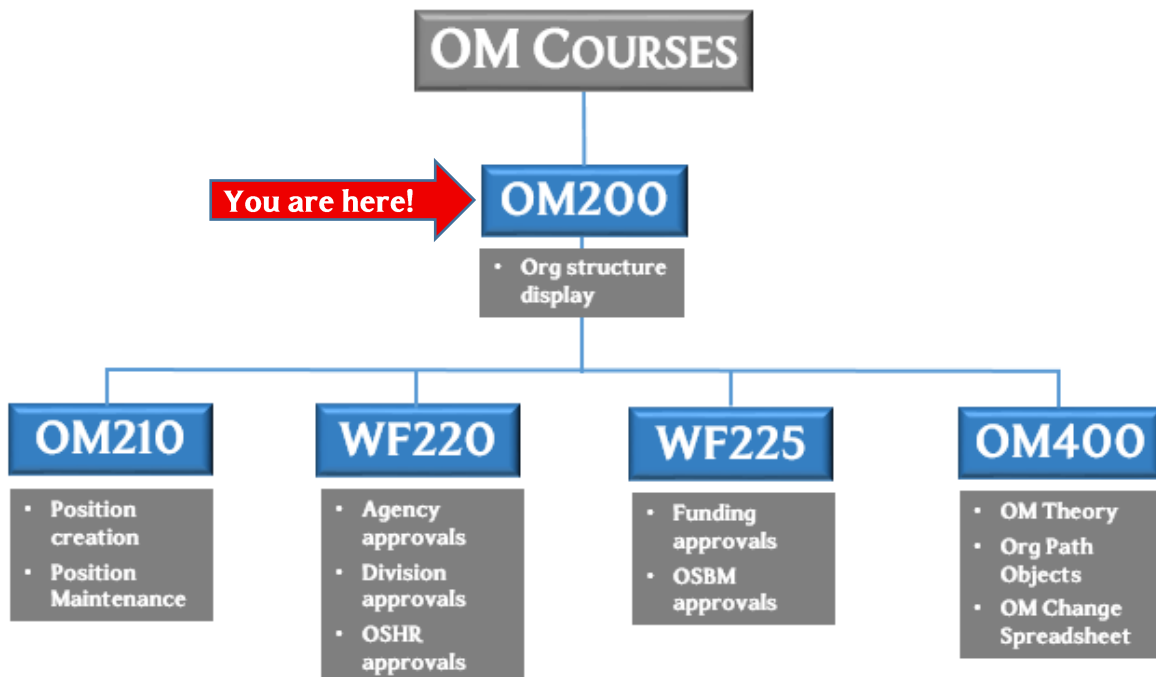
The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesies. The instructor will inform you about the building facilities and when breaks will occur.

Integrated HR-Payroll System Training Curriculum

The Integrated HR-Payroll System 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



OM = Organizational Management

- **OM200** covers the terms, concepts, processes and reports of the OM module.
- **OM210** covers the functions & duties of a Position Maintainer. It also covers how to create and maintain positions. Reporting is covered as well.
- **WF220** covers the Agency and Division level approver responsibilities.
- **WF225** covers the Funding level approver responsibilities.
- **OM400 (*in development*)** will cover the theory of OM, Org Path objects, and how to use the OM Change spreadsheet to assist with mass org changes in an agency or division.

Strategy for Training

TELL ME (Concepts)

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

SHOW ME (Demonstrations)

Instructor will demonstrate job-related tasks performed in the Integrated HR-Payroll System – HANDS OFF.

LET ME (Exercises)

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

SUPPORT ME (Availability)

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 lessons covered in this class include:

- Lesson 1: PA Concepts
- Lesson 2: OM Concepts
- Lesson 3: Displaying the Organizational Structure
- Lesson 4: OM Reports & Processes
- Lesson 5: Course Review

Course Objectives

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

- Define Organizational Management (OM)
- Identify components of the OM structure
- Display an organizational structure in the HR-Payroll system
- Identify OM reports

Reference Materials

- Student Guide
- Job Aids
- Work instructions - Business Process Procedures (BPPs)
- Online help - from the SAP portal

The materials above can be accessed through the OSC Training HELP website. Use the following link to access the HELP website:

<https://www.osc.nc.gov/training>

SUMMARY

This course is intended to give HR professionals an understanding of the Integrated HR-Payroll System *Organizational Management* module. This course will provide you with demonstration and practice for displaying the organization and staffing assignment structure.

LESSON 1: PA CONCEPTS

Objectives

- This lesson is designed to help you identify and define basic Personnel Administration (PA) concepts.

Dates

The Integrated HR-Payroll System is a date-driven system. Therefore, dates are critical for successful operations. Dates can be entered or system-generated based on the task.

Critical in the Integrated HR-Payroll System

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

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

Validity Periods

The image displays two screenshots of the 'Display Relationships (1001)' form, illustrating how validity periods are defined. Both screenshots show the same form fields: Position (800904001599), Exhibit Designer, Planning Status (Active), and Valid from (12/15/2015). The 'Valid to' field is highlighted with a red box in both. In the first screenshot, the 'Valid to' field contains the default date 12/31/9999. In the second screenshot, the 'Valid to' field contains the manually entered date 12/14/2015. Red arrows point from the labels 'Start date' and 'End date' to the 'Valid from' and 'Valid to' fields respectively. A red box surrounds the 'Valid to' field in the second screenshot.

| Field | Value |
|-----------------|-------------------------------|
| Position | 800904001599 Exhibit Designer |
| Planning Status | Active |
| Valid from | 12/15/2015 |
| Valid to | 12/31/9999 |

| Field | Value |
|-----------------|-------------------------------|
| Position | 800904001599 Exhibit Designer |
| Planning Status | Active |
| Valid from | 12/15/2015 |
| Valid to | 12/14/2015 |

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

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

Delimit

List display with change Relationships (1001)

Position: 800904001599 Exhibit Designer
 Planning Status: Active
 Relationships: 01 S 65003085 1

| Start | End | R.. | Rel... | Relat.text | R.. | Rel'd obje... | Abbr. | % Rate |
|------------|------------|-----|--------|------------|-----|---------------|--------------|--------|
| 12/15/2015 | 12/31/9999 | A | 002 | Reports (I | S | 65003065 | 800904001580 | 0.00 |
| 09/01/2008 | 12/14/2015 | A | 002 | Reports (I | S | 65003040 | 800904001560 | 0.00 |
| 09/01/2008 | 12/31/9999 | A | 003 | Belongs to | O | 21000415 | 48080522864 | 0.00 |
| 10/01/2008 | 12/31/9999 | A | 008 | Holder | P | 80001298 | Servais16 | 100.00 |

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

In the example illustrated above, the position's original Report To was to position 60083262. When it was entered, it had an end date of 12/31/9999.

On 6/1/2015, an entry was made to change the position's Report To to position 60083265. When the effective date of 6/1/2015 was entered, the system automatically delimited the Report To record to 5/31/2015 and applied 12/31/9999 to the relationship change.

The Integrated HR-Payroll System is date-driven so it is essential to understand the concept of validity periods and how the system preserves history.

Integrated HR-Payroll System Foundational Structures

Display Organizational Assignment (0001)

Org Structure

Personnel No: 80001035 Name: Marvin Tillman

EEGroup: A SPA Employees PersA: 4601 Natural and Cultural Resources

EESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: 06/01/2018 to: 12/31/9999 Chng: 06/27/2019 00380197

Enterprise structure

CoCode: NC01 STATE OF NC

Pers.area: 4601 Natural and Cultural Resour... Subarea: NC01 7day Norm

Cost Ctr: 4699999999 CULTURE RESOUR... Bus. Area: 4600 DNCR

Fund: 4699999999 CULTURE- SUSPEN..

Func. Area: 6000000000000001 General Government

Personnel structure

EE group: A SPA Employees Payr.area: 01 NC Monthly

EE subgroup: A1 FT N-FLSAOT Perm Contract: [dropdown]

Organizational plan

Percentage: 100.00

Position: 60083605 MUSM CUR 1
MUSEUM CURATOR I

Job key: 32000712 Musm Cur 1
Museum Curator I

Org. Unit: 20010226 48020602564
CR CDS A&H HIS SIT ..

Org.key: 46014699999999

Enterprise structure

Personnel structure

Organizational Plan

Before we explain in more detail the purpose, attributes, and relationships of each OM object, it is important to review the Integrated HR-Payroll System foundation data structure for employee master data which is comprised of the Enterprise Structure and the Personnel Structure.

NOTE: We will review the **Organizational Plan** in the next lesson.

This structure is displayed on the *Organizational Assignment (0001)* infotype. The screen capture above shows the Organizational Assignment infotype for Marvin Tillman, a sample employee. Look at each of the data fields within these two structures.

Enterprise Structure

| Enterprise structure | | | | | |
|----------------------|-------------------|--------------------------------|-----------|------|-----------|
| CoCode | NC01 | STATE OF NC | | | |
| Pers.area | 4601 | Natural and Cultural Resour... | Subarea | NC01 | 7day Norm |
| Cost Ctr | 4699999999 | CULTURE RESOUR... | Bus. Area | 4600 | DNCR |
| Fund | 4699999999 | CULTURE- SUSPEN... | | | |
| Func. Area | G0000000000000001 | General Government | | | |

The Enterprise structure includes key information for reporting requirements. The Enterprise structure defines the legal and fiscal structure of the State of North Carolina and is comprised of:

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

Company Code

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

| | | |
|--------|------|-------------|
| CoCode | NC01 | STATE OF NC |
|--------|------|-------------|

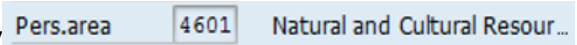
- *NC01 – State of North Carolina - NCAS*

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

- *NC02 – State of North Carolina – DOT & some divisions of Commerce*

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

Personnel Area

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

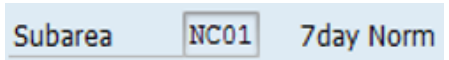
Company Code NC01

- 1401 State Controller
- 1601 Environmental Quality
- Z101 State Human Resources
- 8701 School of Science and Math

Company Code NC02

- 1501 Transportation
- 4305 Some divisions of Commerce

Personnel Sub-Area

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

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

Additional Resources

Refer to the OSC Training website in HELP documents for more information about relevant PSAs associated with each Personnel Area.

Search for the following support document titles:

- *Personnel Area Subarea (PSA) Job Aid*

Miscellaneous Fields

| | | | | | |
|------------|-------------------|--------------------|-----------|------|------|
| Cost Ctr | 4699999999 | CULTURE RESOUR... | Bus. Area | 4600 | DNCR |
| Fund | 4699999999 | CULTURE- SUSPEN... | | | |
| Func. Area | G0000000000000001 | General Government | | | |

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

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

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

- Justice (SBI)
- HHS (403-b)

Personnel Structure

| Personnel structure | | | |
|---------------------|----|------------------|-------------------------|
| EE group | A | SPA Employees | Payr.area 01 NC Monthly |
| EE subgroup | A1 | FT N-FLSAOT Perm | Contract |

The Personnel structure is a description of the employee's position with the state.

The Personnel structure is comprised of:

- Employee Group
- Employee Subgroup
- Payroll Area
- Contract

Employee Group

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

| | | |
|----------|---|---------------|
| EE group | A | SPA Employees |
|----------|---|---------------|

- **A** – SPA Employee (subject to State Personnel Act)
- **B** – SPA Law Enforcement (subject to State Personnel Act)
- **K** – EPA Employees (exempt from State Personnel Act)
- **O** – Supplemental Staff (temporaries, National Guard, contractor, etc.)

Employee Subgroup

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

| | | |
|-------------|----|------------------|
| EE subgroup | A1 | FT N-FLSAOT Perm |
|-------------|----|------------------|

- **A1** FTN-FLSAOT Perm [Full Time Not (subject to) – FLSA Overtime – Permanent]
- **B1** FTS-FLSAOT Perm [Full time Subject (to) – FLSA Overtime – Permanent]

There are many combinations of Employee Groups and Subgroups in the Integrated HR-Payroll System. If the incorrect Employee Group and Subgroup are entered, it impacts time, work against, dual employment, benefits, and pay. You can see why accuracy is so critical when data is entered.

Additional Resources

Refer to the OSC Training website in HELP documents for more information about relevant information associated with each Employee Group and Subgroup.

Search for the following support document titles:

- *Employee Group Job Aid*
- *Personnel Area Subarea Job Aid*

Payroll Area

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

Payr.area 01 NC Monthly

Payroll accounting is performed for each payroll area.

The Integrated HR-Payroll System uses payroll areas to group together employees for whom payroll is run at the same time and to set the dates for the payroll period.

All temporary positions are in the biweekly cycle!

| Payroll Area (1) 3 Entries found | |
|--|----------------------|
| Restrictions | |
| <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> | |
| PArea | Payroll area text |
| 01 | NC Monthly |
| 04 | NC Biweekly |
| 99 | Non-payroll-relevant |

KNOWLEDGE CHECK

| <i>Determine whether the questions below are True or False.</i> | |
|--|---------------|
| Question | T or F |
| 1. The Enterprise, Personnel, and Organizational structures are located on Infotype 0001. | |
| 2. The Employee Group defines more detailed and specific processing for payroll calculation rules, for example, if employee is subject or not subject to FLSA. | |
| 3. The Payroll Area describes the pay frequency and payroll cycle for each employee. | |
| 4. The Personnel Area represents the highest level of the organizational structure. | |
| 5. The date 12/31/9999 indicates that the record is no longer a current record. | |
| 6. The Enterprise structure is the legal and fiscal structure of the State of NC. | |
| 7. The Employee subgroup identifies the agency for whom the Employee works. | |
| 8. Most temporary employees will be paid bi-weekly. | |
| 9. There is one Functional area for the whole state. | |

SUMMARY

In this lesson, you learned to identify and define basic Personnel Administration (PA) concepts.

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LESSON 2: OM CONCEPTS

Objectives

- Define key concepts of Organizational Management (OM)
- Define key terms related to OM
- Identify components of the OM Structure
- Describe the difference between a job and a position

What is OM?

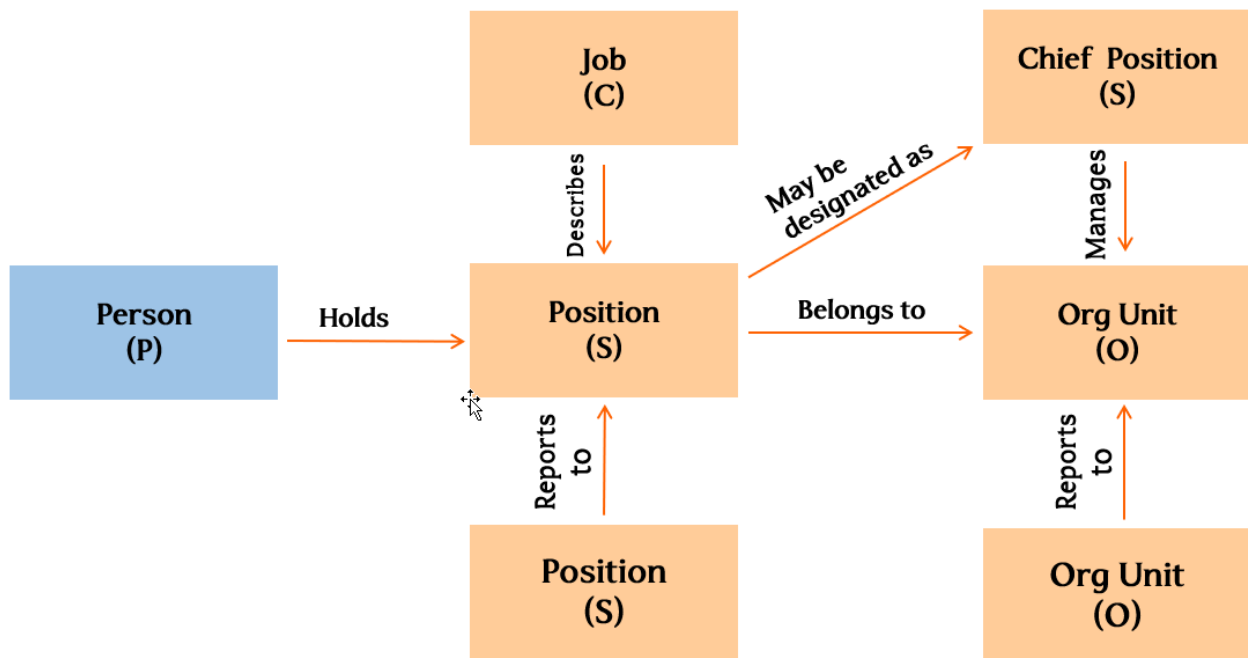
OM is a component within the HR Module that maintains a model of the State of North Carolina's organizational structure. The OM module provides a clear picture of the organization at any point in time: past, present, or future. This information allows an organization to be proactive in planning for future human resource needs.

- OM is used to set up organizational and reporting hierarchy.
- OM uses relationships to manage the display of data.
- OM is used to construct and maintain an enterprise organizational chart.
- OM groups employees by function/business unit/geographical area.
- OM defines the cost distribution and salary for each position.

Organizational Management Objects

Organizational Management is based on the concept that each element in an organization represents a stand-alone object with individual attributes. These objects are created and maintained separately, then linked together through relationships.

Relationship of Objects



The primary elements that comprise an organizational hierarchy are:

- Organizational Unit (org unit)
- Position
- Persons

Objects have:

- Attributes
- Relationships

You begin with the org unit. Within the org unit, a position is created. The position is linked to a job. A person fills the position.

OM Objects in PPOSE

Organization and Staffing Display

Object manager scenario: OME000

02/02/2016 + 3 Months

Staff Assignments (Structure)

| ID | Name |
|------------|---|
| O 20000046 | Chief |
| S 60088995 | Cultural Resources |
| O 20000025 | Priscilla Branco |
| S 60083255 | Cabinet Secretary |
| P 80000023 | James Matthews |
| O 20010124 | CR CABSEC Chief Deputy Secretary |
| S 60083256 | W/A Deputy Secretary/Commissioner II |
| S 60083257 | Assistant To The Cabinet Secretary |
| S 60083260 | Assistant To The Chief Deputy Secretary |
| S 60083261 | Dcr Legislative Liaison |
| S 60083273 | Office Assistant IV |
| S 60083274 | Facility Construction Engineer I |
| S 60083275 | Head Dcr Capital Projects |
| S 60083282 | Dcr Internal Auditor |
| S 60090774 | Office Assistant IV |
| S 65002735 | Assistant To The Cabinet Secretary |
| S 65002736 | Assistant To The Cabinet Secretary |

Annotations:

- O = Org Unit**
8 digits – begins with 2
- P = Person**
8 digits
- S = Position**
8 digits – begins with 6

The primary objects that comprise an organizational hierarchy are:

- Organizational Unit (org unit)
- Position
- Persons

The organizational structure displays the org units, positions and persons as illustrated above. Jobs and Cost Centers can be found by drilling down into other objects.

Organizational Unit (O)

An **Organizational (Org) Unit** incorporates positions. It is the functional unit of the State of North Carolina (or any organization). An Org Unit can be the State of North Carolina, agencies/departments, or any subordinate org units throughout the organization. The holder inherits his/her org assignment from the position. In summary, an organizational unit represents any type of organizational entity found in the State.

Organizational plan

| | | |
|------------|----------------|---------------------------------------|
| Percentage | 100.00 | |
| Position | 60083605 | MUSM CUR 1 MUSEUM CURATOR I |
| Job key | 32000712 | Musm Cur 1 Museum Curator I |
| Org. Unit | 20010226 | 48020602564 CR CDS A&H HIS SIT ... |
| Org.key | 46014699999999 | |

Positions are assigned to an Organizational Unit. An Org Unit can have subordinate Org Units reporting to it, or it can be a subordinate that reports to another Org Unit.

- An org unit number is eight digits long and begins with a "2."
- Org units are linked together to represent the organizational charts.
- An unlimited number of org units can be created within an organizational plan.
- Relationships between org units are identified to determine the hierarchy within the organizational structure.
- Org units are defined by agency/department and maintained by an OM Administrator at BEST Shared Services.

The SAP code for an org unit is "O."

An example of an entity within the organization is listed below:

--> Dept of Cultural Resources (*Agency/department*)

--> Archives & History Office (*Division*)

--> Historical Resources (*Section*)

--> State Archives & Records Section (*Branch*)

Typical relationships in SAP

An org unit reports to another org unit; is assigned a cost center; is a line supervisor of another org unit; incorporates a position; is managed by a position and may have several other relationships pertaining to Workflow approval.

Position (S)

A Position:

- Belongs to an org unit (O)
- Is described by a job (C)
- Represents a set of tasks performed by a person
- May be classified as Chief position
- May be vacant or occupied by persons (employees)
- Can be occupied by one or more persons (P)
- Number can begin with 60 or 65
 - 60 - transferred in at Go-Live; 65 - created since Go-Live

The position number is eight digits long and begins with a "6."

The SAP code for a Position is "S."

The position number is assigned sequentially by the Integrated HR-Payroll System. Therefore, there is no logic to the number assignment.

Position to Position Relationships

A Position:

- Reports to another position, such as the Personnel Analyst position "reports to" the Human Resources Director.
- Can be a line supervisor of another position, such as the Human Resources Director "is line supervisor of" the Personnel Analyst.
- Can manage an Org Unit.

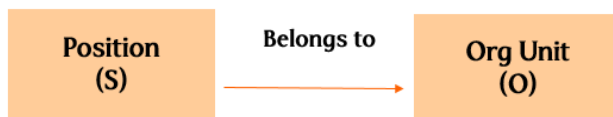
The formal relationships between positions is used to build the **Reporting Structure**.

Relationships of OM Objects

A Position belongs to an Org Unit.

An Org Unit incorporates a Position.

Positions inherit attributes of a Job (C) and specific classifications of work duties are appended.



Chief Position

A Chief position:

- Chief positions supervise subordinate Chief positions.
- Manages the org unit and any subordinate org units
- Can only have one chief per org unit

Some positions are designated as Chief positions to indicate span of control.

An org unit *is managed by* one position (a chief or manager).

Job (C)

A job:

- Describes the general classification of functions and duties that are identical across the State
- Defines Planned Compensation (salary range)
- Is not occupied by persons (employees)
- Is the basis for creating positions (Multiple positions can be described by one job)
- Defines the SOC code, EEO category, job group, and census codes
- Is defined by OSHR and created by BEST Shared Services
- Maintained in the Integrated HR-Payroll System by OM Production Support
- Belongs to a Job Branch within a Job Family

The SAP code for a job is "C."

A Job is a general *classification* of duties and attributes. IT1002 - Description contains subtypes which describe:

- Description of work
- Education & Experience requirements
- Job specifications
- Competencies required

Typical attributes are function and Job Branch. One Job can be used to create many positions.

A Job is identified by a unique eight-digit number that begins with "3."

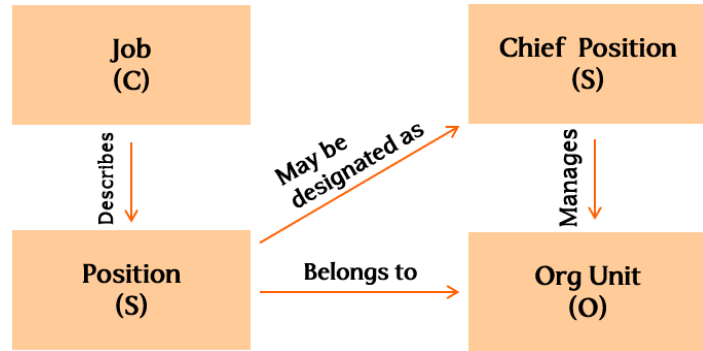
When you hear the term *class* or *classification*, you will immediately know that a job is being referenced. Of course, the converse is also true—when you hear job, you will know it is a *classification*.

Relationships of OM Objects

A job is the same as a classification.

Jobs are general classifications of tasks routinely performed together and is the template from which positions are created.

A Position inherits attributes of a job.



Job versus Position

| Job versus Position | |
|--|---|
| Defines general classification of functions and duties that are identical across the State | Represents specific tasks performed by a person |
| Has a one-to-many ratio to positions | Has a many-to-one ratio to jobs |
| Defines EEO, Job Group and Census Codes | Inherits attributes from the job and org unit |
| Is not held by a person (employee) | Held by a person (employee) |
| Is the basis for creating positions | May be classified as Chief position |
| | Is activated by BEST Shared Services |

In the following example, there may be several different types of Administrative Assistant (AA) positions in the organization. Each AA position has its own specific tasks and duties; however, some general information is common to all AA positions. For example, the EEO, Job Group, Census Code and some tasks are applicable to all AA classifications. This general information is created in the job and then used as a template to create the various AA positions. The specific information pertinent to each AA position is then added at the position level.

Job: Administrative Assistant

Positions that could be classified as an Administrative Assistant:

- Human Resources Assistant
- Accounting Assistant
- Inventory Assistant

Example:

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

The relationship between jobs and positions is the same for all current pay plans, and the prior graded and banded pay plans. More examples of job (classification) titles and position (working) titles are below.

| Official Job (Classification) Title | Position (Working) Title |
|-------------------------------------|---|
| Engineer I | <ul style="list-style-type: none"> • Water Quality Engineer • Air Quality Engineer • Building Systems Engineer • County Maintenance Engineer • Elevator Engineer • Environmental Engineer |
| Administrative Assistant I | <ul style="list-style-type: none"> • Human Resources Assistant • Accounting Assistant • Inventory Assistant |

Person (P)

The Person is a PA object maintained on the PA side.

A person:

- is assigned to a position.
- holds a position which is described by a job which belongs to an org unit.
- inherits the attributes of all related OM objects.

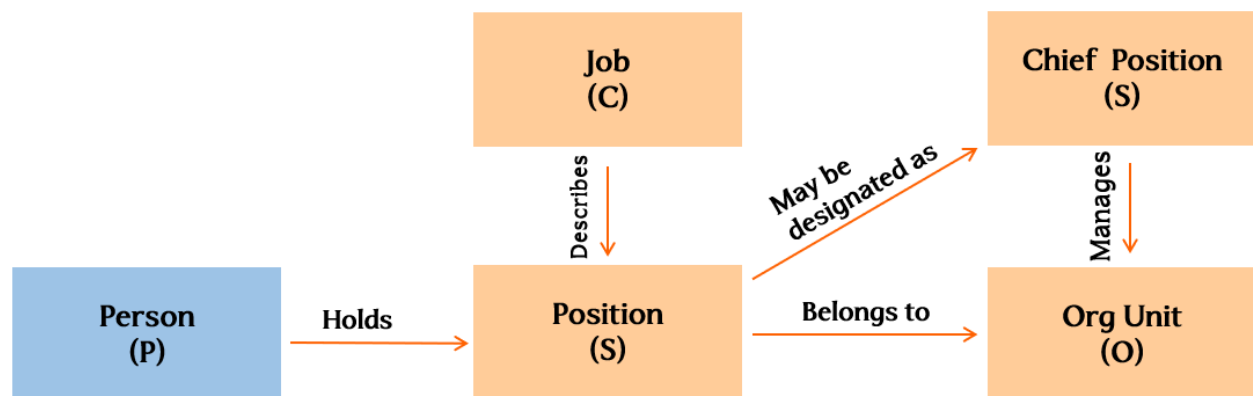
Personnel data is created and maintained via Personnel Administration by

- Agency HR
- Employee Self-Service
- Manager Self-Service
- BEST Shared Services

The SAP code for a person is "P."

Persons represent employees and are the central object in the Personnel Administration module. The object Person refers to the physical person who fills a given position.

Relationships of OM Objects



Persons hold (occupy) positions.

Summary of OM Relationships

Organizational Management is based on the concept that each element in an organization represents a stand-alone object with individual characteristics. These objects are created and maintained separately and then linked together through relationships to form a network which has the flexibility to handle human resources needs.

Organizational Plan/Integrated HR-Payroll System Foundational Structures

In the first lesson, we reviewed the Enterprise and Personnel structures. Now that we understand the purpose of each OM object, let us now review the Organizational structure that is displayed on the *Organizational Assignment* (0001) infotype of an employee's master data record. The screenshot to the right shows the Organizational Assignment infotype for Marvin Tillman, a sample employee. Look at each of the data fields within this structure.

| Organizational plan | |
|---------------------|---|
| Percentage | 100.00 |
| Position | 60083605 MUSM CUR 1 MUSEUM CURATOR I |
| Job key | 32000712 Musm Cur 1 Museum Curator I |
| Org. Unit | 20010226 48020602564 CR CDS A&H HIS SIT... |
| Org.key | 46014699999999 |

The Organizational Plan defines the hierarchical relationship between organizational management objects including org units, positions, and jobs.

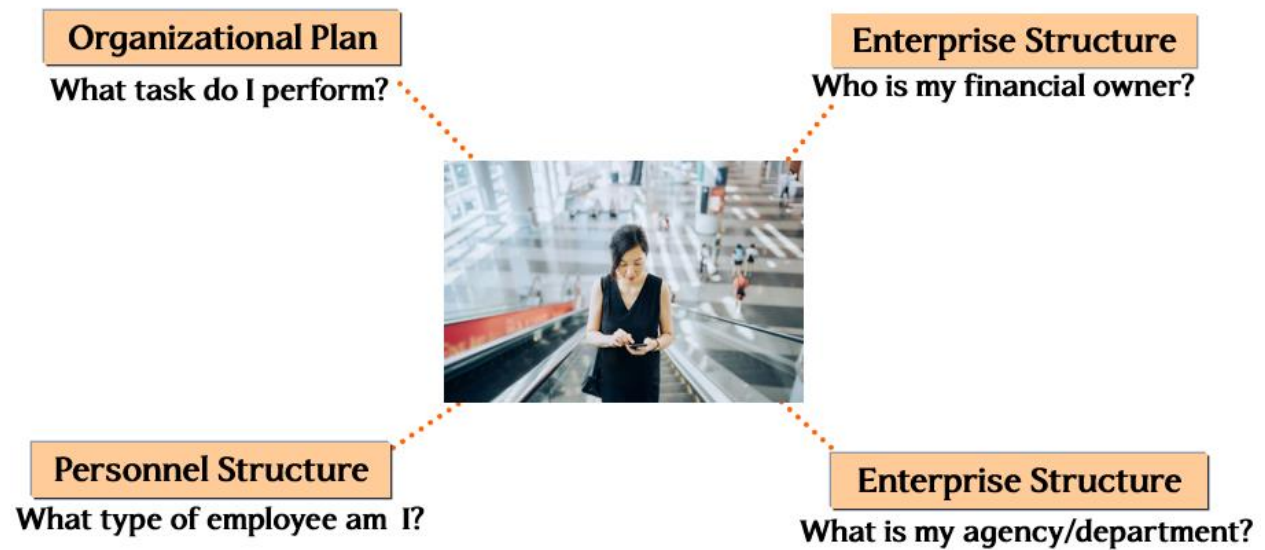
The staffing percentage indicates which percentage of an employee's time is to be spent in the position entered. The **Percentage** will always be 100% and identifies that the employee is working 100% of what he or she was offered and accepted.

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

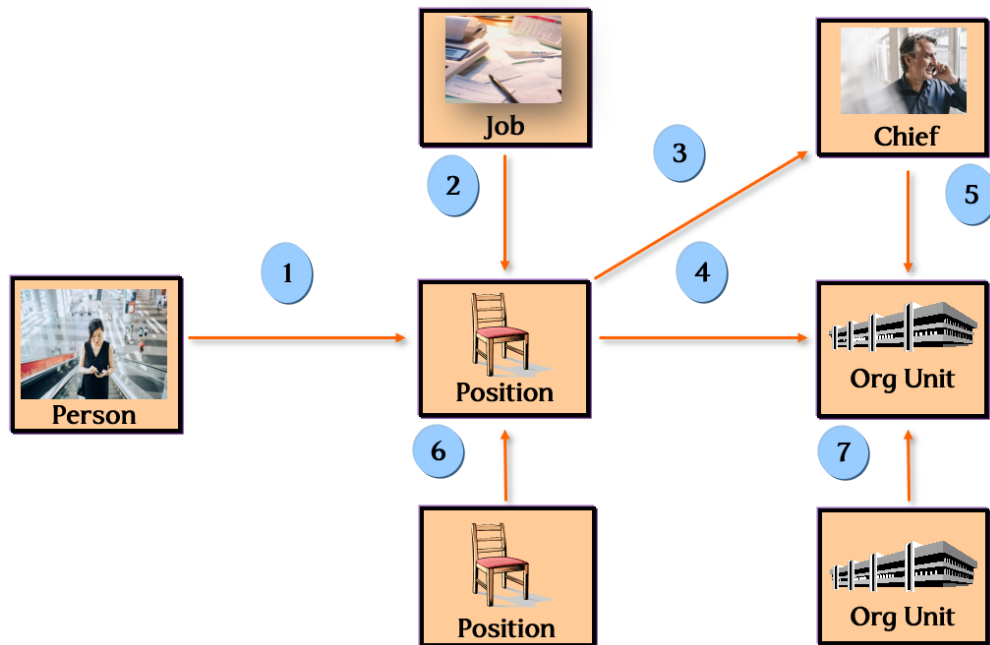
- The **Position** displays the Position (working) title.
- The **Job key** represents the Job (classification) defined by OSHR.
- The **Org Unit** represents the agency/department to which the position is assigned.
- The **Org key** is an automatically assigned, system-generated number.

Employee's Perspective

In summary, the graphic below shows how an employee is related to the Integrated HR-Payroll System Foundation Structures.



KNOWLEDGE CHECK



Which relationship applies? Match the relationships below to their respective objects.

- | | |
|----------------------|----------|
| Belongs to | 1) _____ |
| Describes | 2) _____ |
| Reports To | 3) _____ |
| Manages | 4) _____ |
| May be designated as | 5) _____ |
| Holds | 6) _____ |
| Reports To | 7) _____ |

SUMMARY

In this lesson, you learned to:

- Define key concepts of Organizational Management (OM)
- Define key terms related to OM
- Identify components of the OM Structure
- Describe the difference between a job and a position

LESSON 3: DISPLAYING THE ORGANIZATIONAL STRUCTURE

Objectives

- Display an organizational structure using Organization and Staffing Display or PPOSE
- Explain how to use the Position Overview Screen or ZPOS

PPOSE - Display Org Units and Positions

The transaction PPOSE – Organization and Staffing Display is used to review org units and positions in an organization. An organizational plan can be made with many object types, although these three basic object types are the building blocks:

- Org Units
- Positions
- Persons (hold positions that are defined by jobs.)

Using PPOSE

The PPOSE transaction can be used to display the State's organizational structure and all the elements included in the structure, including org units, positions, jobs, and people. Also, you can use this transaction to find a position number, which is required to complete personnel actions such as new hire.

Access Organizational & Staffing Display by one of the following methods:

- The SAP Easy Access menu: *Human Resources > Organizational Management > Organizational Plan > Organization and Staffing > Display*
- The shortcut Transaction code is **PPOSE**.

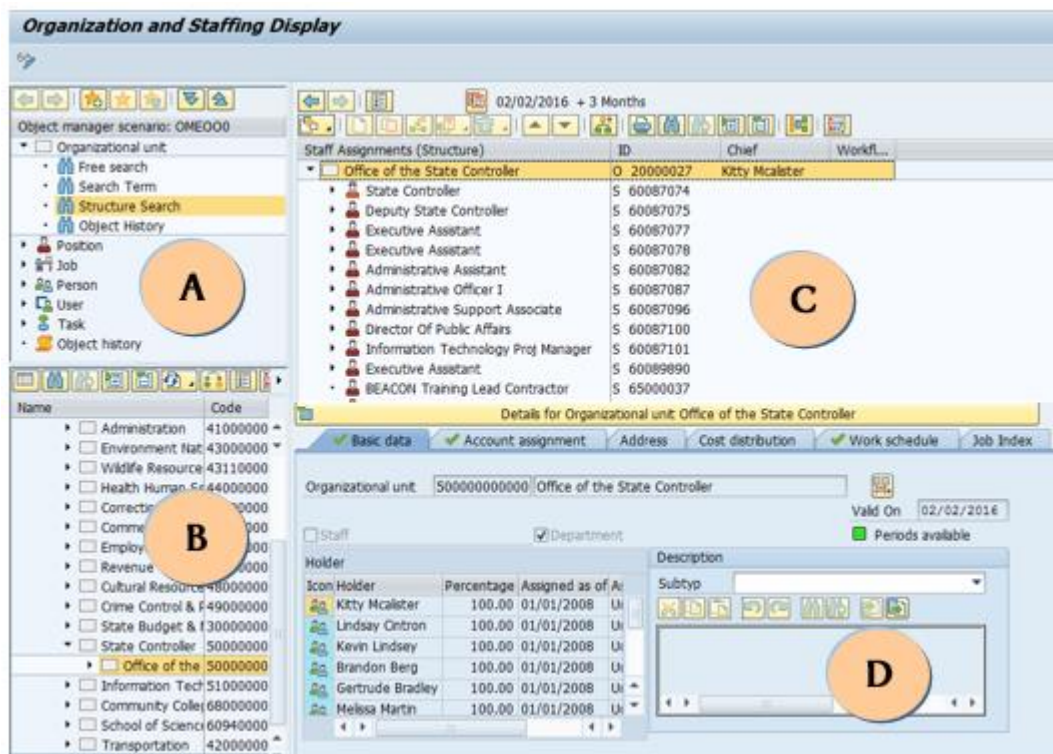
NOTE: T-code is an abbreviation for transaction code.

Organization and Staffing Display transaction can be used to view the existing organizational structure.

Within Organization & Staffing Display, you can:

- Display org units
- Display positions
- Identify "Chiefs"
- Display holders of positions

Organization & Staffing Display Screen Layout



This transaction allows the user to display the existing organizational structure in a graphical view.

Object Manager

The *Object Manager* consists of the Search Area and the Selection Area (part A & B). To hide or show the object manager, select the *Settings* menu option.

A - **Search Area** - The Search Area allows users to search for organizational information based on:

- Org Unit
- Position
- Job (not populated)
- Person

B - **Selection Area** - The results of searches performed in the Search Area are displayed directly below the Selection Area. You can modify the search results by sorting or filtering. You can add and delete columns to easily find the object. Once the user selects an item from the Selection Area, the results are displayed in the Overview and Details Area.

C - **Overview Area** - The Overview Area lists the:

- Organizational Structure
- Code
- ID
- Relationship
- Chief position
- Valid from and Valid to
- Assigned as of
- Assigned until

When the user selects items on the Overview Area, for example, selecting an org unit, the details for that selection display directly below the Overview Area in the Details Area.

D - **Details Area** - The Details Area lists the:

- Basic Data
- Account Assignment
- Work Schedule

NOTE: The Cost Distribution is on the Position, not the Org Unit.

The Details Area displays more information about the object selected in the Overview Area. The name of the tabs change depending on the object type highlighted in the Overview Area.

EXERCISE 3.1: Logging on to the Integrated HR-Payroll System

SCENARIO

You need to log on to the Integrated HR-Payroll System.

Instructions

1. Click on the Favorites on your Internet browser to access the Training portal link.
2. Enter the **User ID** and **password** that is assigned to you by your instructor.
3. Click on the **Log on** button.
4. Click **Yes** to confirm the security message displayed.
5. Click on the **SAP GUI tab**.
6. Click on the **training client** specified by your instructor.
7. **Stop** when you have reached the SAP Easy Access screen.

Now we will create Favorite links for the transactions we will use in class.

8. Right-click on **Favorites**.
9. Select **Insert transaction** from the list. A dialog box is displayed.
10. Enter **PPOSE** in the text box. Click **Enter** to add the favorite.
11. Repeat steps 8-9 and add another favorite: **ZPOS**. Then click **Enter** to add the favorite.
12. To be able to display the transaction codes next to the names in your Favorites menu, you must enable technical names. Select **Extras > Settings** from the menu at the top of the screen to display the settings dialog box.
13. Click the checkmark in the **Display technical names** checkbox.
14. Click the **Continue (Enter)** button. The transaction codes will display in the menu tree now.
15. You can add other items like a URL to your Favorites folder; follow the instructor's direction to do so:

<https://www.osc.nc.gov/training>

16. Open the link once you have it saved to your SAP Favorites.

EXERCISE 3.2: Display an Organizational Structure

SCENARIO

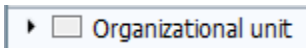
Display an Organizational Structure


Perform this transaction to display an organizational structure of org units which represent the divisions, sections, work groups etc. in your agency or department.

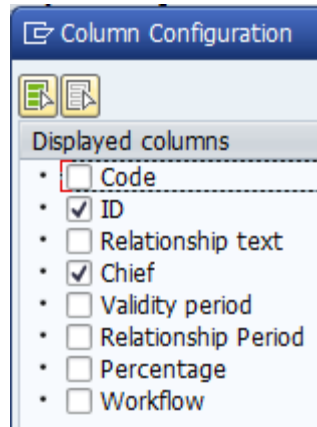
Information:


- Org Unit – Office of State Controller
- Staff assignment
 - Chief position
 - Positions
 - Occupied
 - Vacant
 - Persons (Holders of positions)

Instructions

1. Access **PPOSE** by clicking on the Favorites folder of the SAP Easy Access screen.
2. Press or click **Enter**.
3. In the **Find by** box, click the node next to *Organizational Unit*. 
4. Click **Structure Search**. This will display one or more org units in the bottom left box on the screen (depending on the org units with which you have authority to work).
5. Click on the **nodes** to find the org unit you desire to view.
6. *State of North Carolina → Governor's Cabinet & Agencies → State Controller → Office of the State Controller*
7. Double-click the selected org unit to display a list of positions assigned to the org unit. This structure will be displayed on the upper right side of the screen.

8. Click the **Column Configuration** icon  and then select additional information to be displayed for each position or holder. Select **ID** and **Chief** as a minimum. Un-check Workflow if it is selected.



9. Click **Enter** .
10. Click the nodes next to any position title to view the employee assigned to the position.

EXERCISE 3.3: Display the Organizational Structure

SCENARIO

Display the Organizational Structure

In this exercise, you are the new HR manager at the Office of the State Controller. You want to display the org units and positions for the Office of the State Controller org unit. You will use transaction code PPOSE to perform a structural search to display the organizational structure and staffing assignments.

Information:

- Follow the steps listed below in the Notes section to complete the necessary steps.
- Answer the questions at the end of the exercise.

Instructions

1. Type **PPOSE** in the Command field on the Easy Access screen and click or press **Enter**.
2. At the Organization and Staffing Display, select the **Organization Unit** node.

3. Select **Structure Search** in the Search Area.
4. Click the node for the **State of North Carolina** in the Selection Area.
5. Click the node for the **Governor's Cabinet & Agencies**.
6. Click the node for the **State Controller**.
7. Double-click the **Office of the State Controller**.

Questions/Results

- A. What is the org unit number of the Office of the State Controller? _____
 - B. How many org units report directly to the Office of the State Controller's org unit? _____
 - C. How many positions belong directly to the OSC BEST Shared Services org unit? _____
 - D. What is the title of the position that manages the Office of the State Controller org unit? How do you know? _____
 - E. How many org units report to the Electronic Commerce org unit? _____
8. Ensure that you have selected the top line. Use the **Collapse icon** in the Overview section to close all the org units.
 9. Ensure that you have selected the top line. Use the **Collapse icon** in the Selection section to collapse all the org units.

EXERCISE 3.4: Display the Organizational Details**SCENARIO****Display the Organizational Details**

Perform this transaction to display the master data details for an org unit.

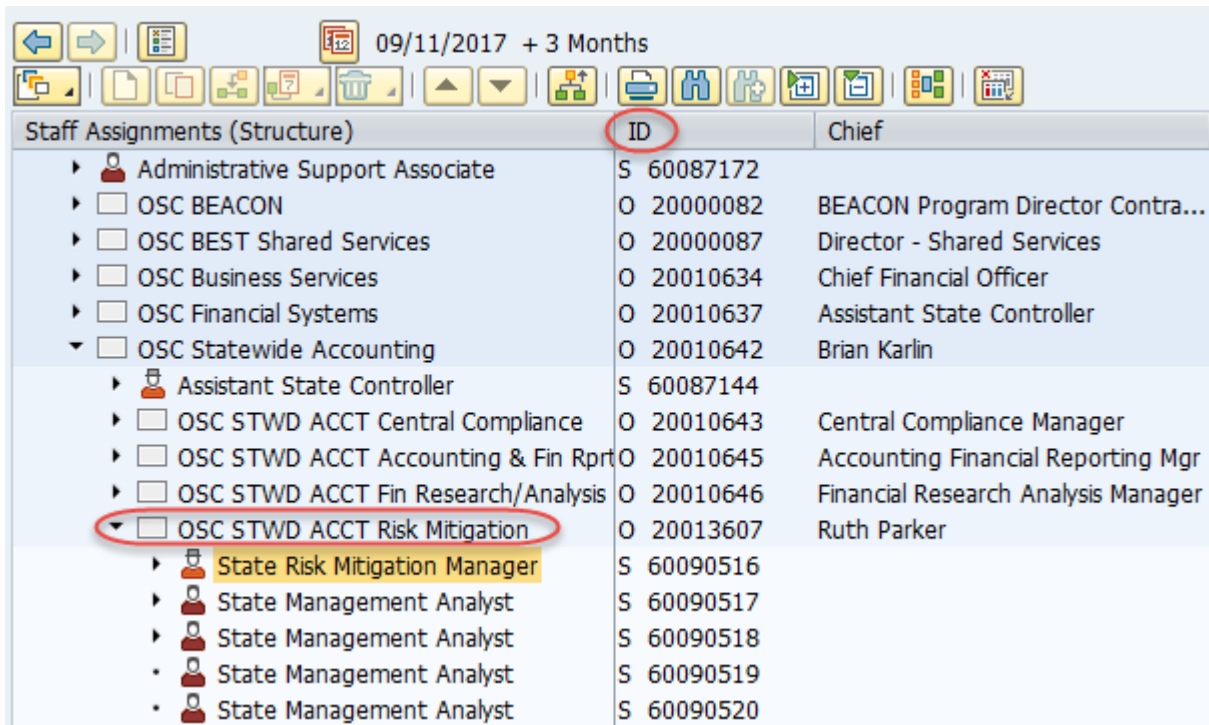
Information:

- Org Unit – Office of the State Controller
- OSC Statewide Accounting
- OSC STWD ACCT Risk Mitigation Section

NOTE: The details are different for each OM object (org unit, position, and job).

Instructions

Follow along with your instructor as you learn to display the Org Unit Details.

Org Unit Conventions


| Staff Assignments (Structure) | ID | Chief |
|-------------------------------------|------------|-------------------------------------|
| Administrative Support Associate | S 60087172 | |
| OSC BEACON | O 20000082 | BEACON Program Director Contra... |
| OSC BEST Shared Services | O 20000087 | Director - Shared Services |
| OSC Business Services | O 20010634 | Chief Financial Officer |
| OSC Financial Systems | O 20010637 | Assistant State Controller |
| OSC Statewide Accounting | O 20010642 | Brian Karlin |
| Assistant State Controller | S 60087144 | |
| OSC STWD ACCT Central Compliance | O 20010643 | Central Compliance Manager |
| OSC STWD ACCT Accounting & Fin Rpt | O 20010645 | Accounting Financial Reporting Mgr |
| OSC STWD ACCT Fin Research/Analysis | O 20010646 | Financial Research Analysis Manager |
| OSC STWD ACCT Risk Mitigation | O 20013607 | Ruth Parker |
| State Risk Mitigation Manager | S 60090516 | |
| State Management Analyst | S 60090517 | |
| State Management Analyst | S 60090518 | |
| State Management Analyst | S 60090519 | |
| State Management Analyst | S 60090520 | |

The object type for an org unit is "O."

The numeric object ID for an org unit will begin with the number 2.

The twelve-digit code, also referred to as the abbreviation, short-text, or number is logically assigned by the agency.

The forty-character description for the org unit is "smart coded" to facilitate your data searching and reporting. The description will start with the description of its superior (parent) org unit. For example, the Statewide Accounting Division of the State Controller's Office org unit description is *OSC STWD ACCT*. This description includes the description of its parent org by using "OSC" to denote Office of the State Controller. The org unit description is *OSC STWD ACCT Risk Mitigation*. This description includes the two superior org units in its description by using "OSC STWD ACCT" to denote both the Office of the State Controller and the Statewide Accounting Division org units.

In the past, OSC has asked that the Org Unit abbreviation contain the four-digit PMIS Dpt/Div for vacancy mapping. Due to the implementation of NeoGov, this is no longer needed, so the Abbreviation field should be used as an abbreviation or as your agency designates.

Numbering Conventions

- Org Units: 20000000 to 29999999
- Positions: 60000000 to 69999999
- Jobs: 30000000 to 39999999

NOTE: Jobs are not displayed in the org structure on PPOSE.

Org Unit Details

Characteristics for each org unit are stored on tabs in the *Details* section of the *Organization and Staffing Display* screen. Some characteristics of org units are inherited by subordinate org units and positions if they have not been maintained. The Integrated HR-Payroll System is using these tabs to define org units:

- Basic Data
- Account Assignment
- Work Schedule

NOTE: The Cost Distribution is on the Position, not the Org Unit.

The remaining tabs (address, cost distribution and job index) are not used.

NOTE: Only the tabs with a green check contain data.

Basic Data Tab

Details for Organizational unit OSC STWD ACCT Risk Mitigation

Basic data Account assignment Address Cost distribution Work schedule Job Index

Organizational unit 500904000000 OSC STWD ACCT Risk Mitigation

Valid On 02/02/2016

☐ Staff ☒ Department ☒ Periods available

| Icon | Holder | Percentage | Assigned as of | Assign |
|------|-----------------|------------|----------------|--------|
| | Ruth Parker | 100.00 | 01/01/2008 | Unlim |
| | Viola Voigt | 100.00 | 01/01/2008 | Unlim |
| | Charles Sanders | 100.00 | 01/01/2008 | Unlim |

Description

Subtyp

The *Basic data* tab provides org units with a unique identity. In the two *Org Unit* fields, the **short and long description** for the org unit are displayed. These descriptions are displayed in the organizational structure. The **Department** indicator is checked for all org units to enable payroll accounting. The employees who hold positions are displayed in the **Holder** table.

Account Assignment Tab

Basic data Account assignment Address Cost distribution Work schedule Job Index

Valid from 07/01/2007

To 12/31/9999

Account assignment

| | | | |
|--------------------|--------------------------------|--|---|
| Controlling Area | State of North Carolina | | for master cost center |
| Master cost center | 1499999999 OSC | | Inherited from State Controller Sinc... |
| Business Area | Office of the State Controller | | |
| Company Code | NC01 STATE OF NC | | |
| Personnel area | 1401 State Controller | | |
| Pers. subarea | NC01 7day Norm | | |

The *Account assignment* tab specifies the controlling area, master cost center, company code, business area, personnel area, and personnel subarea for an org unit. The data is used as default values in *Personnel Administration* also.

Data is inherited by subordinate positions and org units, if they have no direct assignment of their own. Inheritance occurs as follows:

- Account assignment features are inherited by subordinate org units and positions if they have not been maintained.
- If account assignment features have been specified for a superior org unit, these are overwritten by entries on the *Account Assignment* tab page for a subordinate org unit.

Work Schedule Tab

The screenshot shows the 'Work schedule' tab in a SAP interface. The tab is active, indicated by a green checkmark. The interface includes several input fields and a checkbox:

- Work Schedule Grp:** A dropdown menu set to 'All work schedule groups'.
- Valid On:** A date field set to '02/02/2016'.
- Work schedule:** A numeric field set to '40.00', with a label 'Hours of weekly working time' and a calendar icon.
- Origin:** A text field containing 'Organizational unit OSC STWD ACCT Risk Mitigation'.
- Percentage:** A numeric field set to '100.00', with a label '% of Standard value'.
- General work schedule:** A checkbox that is currently unchecked.

The *Work schedule* tab assigns 40 hours as the default **general working time** for the unit itself and for all objects under it in the organizational structure. The general working time is assigned to all subordinate org units, positions, or employee groups if they have no individual working time assignment. Individual working time assignments of subordinate objects override the work schedules they inherit from superior org units. If all positions assigned to an org unit have a different work schedule, you can change the org unit's work schedule and all positions will inherit the value.

EXERCISE 3.5: Display the Org Unit Details**SCENARIO**

In this exercise, you are the HR manager at the Office of the State Controller. The Risk Mitigation org unit was recently created and assigned to the Statewide Accounting Division org unit. The Assistant State Controller has asked you to review the details of the org unit to ensure accuracy. She wants you to check the agency organizational structure to verify that Viola Voigt and Charles Sanders are the holders of State Management Analyst positions.

Instructions

HINT: You are looking for the OSC STWD ACCT Risk Mitigation org unit that reports directly to *OSC Statewide Accounting*.

Using the steps you learned in exercise 3.2, find the appropriate org unit and answer the questions at the end of this exercise.

Instructions

1. Find and select the appropriate org unit.

Questions/Results

- A. Who are the holders of the State Management Analyst positions? _____
 - B. In addition to looking in the Overview section, what other section displays holder information? _____
 - C. What position does Ruth Parker hold? _____
 - D. How would you find the work schedule for the org unit? What are the work schedule hours? _____
 - E. Where would you look to find the work calendar? _____
2. Ensure the top line is selected. Use the Collapse icon in the Overview section to close all the org units.
 3. Ensure the top line is selected. Use the Collapse icon in the Selection section to close all the org units.

EXERCISE 3.6: Display the Position and Person Details

SCENARIO

Perform this transaction to display the master data details for an org unit, position, and person.

Instructions

- Org Unit – OSC STWD ACCT Risk Mitigation
- OSC Risk Mitigation Manager
- Ruth Parker

Instructions

1. Follow along with your instructor as you learn to display the Position and Person Details.

Position Details

The screenshot displays the SAP Organizational Management (OM200) interface. At the top, the date is 09/11/2017 + 3 Months. The 'Staff Assignments (Structure)' tree on the left shows the organizational hierarchy. The 'Details for Position' form is open, showing the following information:

| ID | Chief |
|------------|-------------------------------------|
| S 60087172 | |
| O 20000082 | BEACON Program Director Contra... |
| O 20000087 | Director - Shared Services |
| O 20010634 | Chief Financial Officer |
| O 20010637 | Assistant State Controller |
| O 20010642 | Brian Karlin |
| S 60087144 | |
| O 20010643 | Central Compliance Manager |
| O 20010645 | Accounting Financial Reporting Mgr |
| O 20010646 | Financial Research Analysis Manager |
| O 20013607 | Ruth Parker |
| S 60090516 | |
| S 60090517 | |
| S 60090518 | |
| S 60090519 | |
| S 60090520 | |
| O 20011637 | Electronic Commerce Manager |

The 'Details for Position' form shows the following fields:

- Position: 000000000004 State Risk Mitigation Manager
- Job: Osc Risk Mitigation Manager
- Valid On: 09/11/2017
- Head of own organizational unit: ☒
- Staffing status: Vacancy occupied or put on hold
- Staff: ☐
- Holder: Ruth Par... (100.00, 01/01/2008, Unlimited)
- Description: Subtyp

Position Conventions

The object type for a position is "**S.**"

The object ID number begins with the number 6

Position Details

Characteristics for each position are stored on tabs in the *Details* section of the *Organization and Staffing Display* screen. Some characteristics of positions are inherited from org units and jobs.

The Integrated HR-Payroll System is using these tabs to define positions:

- Basic data
- Account Assignment
- Cost Distribution
- Address
- Work Schedule
- EE Group and EE Subgroup
- If applicable, Position Time settings tabs for overtime, holiday, shift differential, on-call pay, gap hours, extended duty, etc. (A green check indicates the existence of data)
- Ref Position Number - only valid for Position Transfer from PMIS at Go-Live
- SOC/County Code
- Position Type

Basic Data Tab

Details for Position State Risk Mitigation Manager

Basic data | Account assignment | Address | Cost distribution | Work schedule

Position: 900000000004 State Risk Mitigation Manager

Job: Osc Risk Mitigation Manager Valid On: 09/11/2017

☒ Head of own organizational unit

Staffing status: Vacancy occupied or put on hold

☐ Staff

| Icon | Holder | Percentage | Assigned as of | Assigned un |
|------|-------------|------------|----------------|-------------|
| | Ruth Par... | 100.00 | 01/01/2008 | Unlimited |

Description Subtype

The *Basic Data* tab contains the **position name**, **job information**, **chief position indicator** (to signify if the position is the head of the org unit), and **vacancy** information.

Account Assignment Tab

Details for Position State Risk Mitigation Manager

Basic data | Account assignment | Address | Cost distribution | Work schedule

Valid from: 07/01/2007 To: 12/31/9999

Account assignment

Controlling Area: State of North Carolina for master cost center

Master cost center: 1499999999 OSC

Business Area: Office of the State Controller

Company Code: NC01 STATE OF NC

Personnel area: 1401 State Controller

Pers. subarea: NC01 7day Norm

The *Account Assignment* tab identifies the **Personnel Area** and **Personnel Subarea** and identifies cost **objects associated with the org unit**.

Cost Distribution Tab

Details for Position State Risk Mitigation Manager

Valid from 07/01/2007 To 12/31/9999

Master cost center 1499999999 OSC

| COAr | Cost ctr | Order | WBS element | Name | Pct. | Name of |
|------|------------|--------------|-------------|---------------------|--------|---------|
| NC01 | 1430000000 | 100000000155 | | STATEWIDE ACCOUNTIN | 100.00 | 1401100 |

Entry 1 / 1

The *Cost Distribution* tab shows how the **position funding** is set up to be distributed (12 lines displayed, but split can be more than 12 funding sources if necessary).

See the example below of a position that is split funded, denoted by two rows in the table.

| Cost distribution | | | | | | |
|-------------------|------------|--------------|----------------------|-------|----------------------|-----------|
| COAr | Cost ctr | Order | Name | Pct. | Name of aux. account | Fund |
| NC01 | 1424560000 | 100000005674 | BEACON - SHARED SERV | 65.05 | 140110002456 | 141000005 |
| NC01 | 1424560000 | 100000005674 | BEACON - SHARED SERV | 34.95 | 140110002456 | 141000001 |

Work Schedule Tab

Details for Position State Risk Mitigation Manager

Valid On 09/11/2017

☒ No periods

Employee group/subgroup

Employee group A SPA Employees

Employee subgroup A1 FT N-FLSAOT Perm

Work schedule

Origin Position State Risk Mitigation Manager

Working time 40.00 Hours of weekly working time

Approval 100.00 % of Organizational unit OSC STWD ACCT Risk

The *Work Schedule* tab identifies the **working time** for the selected position as well as the **Employee Group** and **Employee Subgroup**.

EE Group/Subgroup

Details for Position State Risk Mitigation Manager

Address Cost distribution Work schedule EE group/subgroup OT Comp Time

Valid from 07/01/2007
To 12/31/9999

Employee Group A SPA Employees
Employee subgroup A1 FT N-FLSAOT Perm

The *EE Group/Subgroup* tab identifies the **Employee Group** and **Employee Subgroup** and the **validity period** for the selected position.

SOC/County Code Tab

Details for Position State Risk Mitigation Manager

Gap Hrs Comp Elig Ref Position Number SOC / County Code Position Types

Valid from 07/01/2007
To 12/31/9999

SOC Code 151020
County Code 092

The data displayed on the *SOC/County Code* tab is inherited from the job. The **Standard Occupational Classification** or SOC is used for EEO reporting by OSHR.

The **County Code** is used to identify the county in which the position is assigned.

Position Types Tab

Details for Position Executive Assistant

Weekend Nurse Extended Duty Gap Hrs Comp Elig Ref Position Number SOC / County Code Position Types

Valid from 07/01/2007
To 12/31/9999

None ☒
Emergency ☐
Essential ☐
Mandatory On-site ☐
Key Non-Key Position

The *Position Types* tab will indicate if the position is classified as Emergency, Essential, Key, and Mandatory On-site.

The State has four separate designations for position types which are defined 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.
- **Mandatory On-Site:** Positions occupied by employees in permanent, probationary, or time-limited appointments that are required to report to a designated worksite (particularly when all other positions are restricted from coming into the workplace), other than their personal residence, and only for those specific dates and times that such onsite reporting is required during a public health emergency. These positions include, but are not limited to, positions that directly impact public health and patient care; public safety; operation of critical infrastructure and facilities; operation and safety of sensitive research labs and ongoing care for research animals, and the custody or care of persons or property for whom the state has a duty to continue to serve.

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

Other Position Detail Tabs

- The **Address** tab contains the main address, the mailing address, and a courier address for the position.
- **Position Time setting tabs** - Stores the position time settings if a position is eligible for additional compensation such as overtime compensation, holiday compensation payout, etc. (The applicable time setting tab will display with green checks).
- The **Reference Position Number** tab stores the PMIS position number for those positions brought over at Go-Live.

EXERCISE 3.7: Display the Position Details

SCENARIO

In this exercise, you are the HR manager at the Office of the State Controller. The OSC STWD ACCT Risk Mitigation org unit was recently created. Your agency Personnel Director has asked you for complete details on the OSC Risk Mitigation Manager position and the OSC STWD ACCT Risk Mitigation org unit.

Instructions

1. Use the steps you learned in the previous exercises and find the appropriate information. Answer the following questions.

Questions/Results

- A. Where can you find the funding source for this position? _____
- B. Who occupies this position? _____
- C. How is the position work schedule assigned? Could it have been different on this position from the default? If yes, why? _____
- D. What should the *staffing status* indicate? Where did you find this information? _____
- E. Look at the State Management Analyst position **60090519**. Why does this position have a work schedule if it is vacant? _____
- F. What Personnel Subarea is assigned to the OSC STWD ACCT Risk Mitigation org unit? How did you find this information? _____

Person Details

The screenshot displays the OM200 software interface. At the top, there is a date selector set to "09/11/2017 + 3 Months". Below this is a "Staff Assignments (Structure)" tree view. The tree is expanded to show the "OSC STWD ACCT Risk Mitigation" branch, which includes the "State Risk Mitigation Manager" position. This position is highlighted with a red box, and its details are shown in the "Details for Person Ruth Parker" section below. The details section has two tabs: "Basic data" (selected) and "Qualification". The "Basic data" tab shows a table with the following data:

| Icon | Existence | Position | Job | Organizational | Valid On |
|------|-----------|-------------------------------|-----------------------------|----------------|------------|
| | | State Risk Mitigation Manager | Osc Risk Mitigation Manager | OSC STWD AC | 09/11/2017 |

Below the table, there is a "No periods" checkbox which is checked. At the bottom of the interface, there is a "Personnel No" field with the value "80000017" and a "Name" field with the value "Ruth Parker". Other fields include "EEGroup" (A), "SPA Employees", "PersA" (1401), "State Controller", "EESubgroup" (A1), "FT N-FLSAOT Perm", and "Statu" (Active).

Person conventions

The object type for a person (employee) is "P."


The object ID number is generated by ORBIT (Retirement System).

Person details

The details for the person are displayed on the *Basic data* tab.

Print View


| Organization and Staffing Display | | | |
|--|---|----------|------------------------------------|
| Staff Assignments (Structure) | | ID | Chief |
| Office of the State Controller | O | 20000027 | Kitty Mcalister |
| State Controller | S | 60087074 | |
| Deputy State Controller | S | 60087075 | |
| Executive Assistant | S | 60087077 | |
| Executive Assistant | S | 60087078 | |
| Administrative Assistant | S | 60087082 | |
| Administrative Officer I | S | 60087087 | |
| Administrative Support Associate | S | 60087096 | |
| Director Of Public Affairs | S | 60087100 | |
| Information Technology Proj Manager | S | 60087101 | |
| Executive Assistant | S | 60089890 | |
| BEACON Training Lead Contractor | S | 65000037 | |
| Fiscal Research Staff Member | S | 65000503 | |
| Fiscal Research Staff Member | S | 65000504 | |
| BEACON Principal Fiscal Analy Contractor | S | 65000512 | |
| BEACON Principal Fiscal Analy Contractor | S | 65000631 | |
| Administrative Support Associate | S | 60087172 | |
| OSC BEACON | O | 20000082 | BEACON Program Director Contractor |
| OSC BEST Shared Services | O | 20000087 | Director - Shared Services |
| OSC Business Services | O | 20010634 | Chief Financial Officer |
| OSC Financial Systems | O | 20010637 | Assistant State Controller |
| OSC Statewide Accounting | O | 20010642 | Brian Karlin |
| Assistant State Controller | S | 60087144 | |
| OSC STWD ACCI Central Compliance | O | 20010643 | Central Compliance Manager |
| OSC STWD ACCI Accounting & Fin Rptng | O | 20010645 | Accounting Financial Reporting M |
| OSC STWD ACCI Fin Research/Analysis | O | 20010646 | Financial Research Analysis Mana |
| OSC STWD ACCI Risk Mitigation | O | 20013607 | Ruth Parker |
| Osc Risk Mitigation Manager | S | 60090516 | |
| Ruth Parker | P | 80000017 | |
| State Management Analyst | S | 60090517 | |
| State Management Analyst | S | 60090518 | |
| State Management Analyst | S | 60090519 | |

Click the **Print**  button on the Overview Area's toolbar to see a print preview of the structure that you have selected.

ZPOS - Position Overview Screen

| OM Position Overview | | | | |
|---|---|-------------------|----------------------|------------|
| Position Overview | | As Of: 07/03/2019 | Run Date: 07/03/2019 | |
| Position Data | | | | |
| Position: | 65002345-Historic Preservation/Restora Supv | | | |
| Org Unit: | 20010232-CR CDS A&H HIS RES HFO SurveysPlan Brnch | | | |
| Holder: | VACANT - | | | |
| Supervisor: | 60083613-Sondra G Carpenter | | | |
| Business Area: | 4600-DNCR | | | |
| Pers Area: | 4601-Natural and Cultural Resources | | | |
| Pers Subarea: | 7day Norm | | | |
| EE Group: | A -SFA Employees | | | |
| EE Subgroup: | WA-PT N-ELSAOT Perm | | | |
| SOC: | 19-3093-Historians | | | |
| County: | Wake | | | |
| PMIS Ref No: | - - - | | | |
| Emergency: | No | | | |
| Essential: | No | | | |
| Key Position: | Non-Key Position | | | |
| Main Address: | 109 E Jones Street Raleigh, NC 27601 | | | |
| Supv Pos: | N | | | |
| Statutory Exemption Type: | No | | | |
| OSHR Hold on position: | N/A | | | |
| Agency Hold on position: | N/A | | | |
| Most Recent Workflow Action: 06/01/2018 Reallocate Pay Plan Change | | | | |
| Fund Data | | | | |
| Budgeted Salary: 440,145.00 | | | | |
| CostCenter: | Order: | NCASFinancialKey: | Fund: | Percentage |
| 4610000000 | 100000005411 | 46011250100 | 461250001 | 100.00 |
| Disclaimer: Not for Public Information | | | | |

The *Position Overview* screen is a “snapshot” of a position’s information.

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 to perform a search for the position using the organizational structure.

NOTE: Use of the matchcode in this situation may result in a delay in the return of information due to extended processing length if the user has a wide range of security.

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 will 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 other fields are pulled from existing infotypes.

NOTE: Some agencies only go to the Section level in their Org Path. If no Branch level is available, **NA** will be displayed in the Branch field.

KNOWLEDGE CHECK

Match the terms below to the definitions listed in this table.

| Chief Position | Enterprise Structure | Org Unit | Person or Holder | Personnel Structure |
|--|-----------------------------|----------------------------|-------------------------|----------------------------|
| Company Code | Job | Organizational Plan | Personnel Area | Position |
| Question | | Answer | | |
| 1. A description of the employee's position in the State. | | | | |
| 2. Defines the hierarchical relationship between organizational management objects including org units, jobs, and positions. | | | | |
| 3. Described by a job and related to an org unit. As a rule, may be held by one person. | | | | |
| 4. Employee who holds a position which is described by a job and which belongs to an org unit. | | | | |
| 5. Provides a general classification of tasks that are routinely performed together and is used to describe several positions. | | | | |
| 6. Provides legal and reporting requirements, including the Company Code, Personnel Area, Personnel Subarea, and Cost Center. | | | | |
| 7. Represents any type of organizational entity found in the State. | | | | |
| 8. The highest org unit of financial accounting (NC01 or NC02). | | | | |
| 9. The position responsible for managing transactions within an org unit. | | | | |
| 10. Used by Payroll to identify the specific agency for whom the employee works. | | | | |

SUMMARY

In this lesson, you learned to:

- Display an organizational structure using Organization and Staffing Display or PPOSE
- Explain how to use the Position Overview Screen or ZPOS

LESSON 4: OM PROCESSES AND REPORTS

Objectives

- Identify OM activities and compare responsibilities of OM process partners
- Identify OM reporting solutions

High-Level Overview of OM Processes & Partners

| Activity | Agency/Department HR | OSHR | BEST Shared Services |
|---------------------------------|-------------------------|------|-------------------------|
| Organizational unit changes | ★ | | ★ |
| Mass position updates | ★ | | ★ |
| Job Processing | | ★ | ★ |
| Position Processing | ★ | | ★ |
| Legislative Increases | | | ★ |
| Mass edit of budgeted positions | | | ★ |
| Work Against | | | ★ |

★=has responsibilities in the OM process



INFORMATION

Some of these activities require approved request forms which can be found at the link below:

<https://www.osc.nc.gov/state-agency-resources/customer-service-hr-payroll/best-forms-and-reports/organizational-management>

| Activity | Agency & Department HR | OSHR | BEST Shared Services |
|---|--|--|--|
| Organizational processing includes adding or changing an org unit. | Submits the approved <i>Organization Management Change Form</i> to BEST Shared Services via email. | | BEST Rep – Verifies form is legible, from an authorized person, and follows other basic guidelines. |
| Mass position updates | | | Creates or changes org units/positions in the Integrated HR-Payroll System. |
| Job Processing, includes creating, changing, delimiting jobs, branches, and families. | | <p>Completes the <i>Job Request</i> form.</p> <p>Submits form to BEST Shared Services via email.**</p> | <p>BEST Rep – Verifies form is legible, from an authorized person, and follows other basic guidelines.</p> <p>Creates, changes, or delimits job, branch, and family in the Integrated HR-Payroll System.</p> |

**The Office of State Human Resources is generally responsible for establishing, revising, and maintaining the Classification Plan. For each class established by the State Human Resources Commission, a class standard is prepared. Standards can be written in several forms. The most frequently used are specifications and benchmarks. In the Integrated HR-Payroll System, these classifications are referred to as "Jobs."

Jobs are used to describe the duties and responsibilities of positions and serve as descriptions that apply to several positions with similar tasks or characteristics. When a new position is created, it will be paired to a *job* that already exists in the Integrated HR-Payroll System. The position will inherit the characteristics of the job automatically. This relationship will make it easier to create positions that are similar or the same as it will not be necessary to assign characteristics to each individual position.

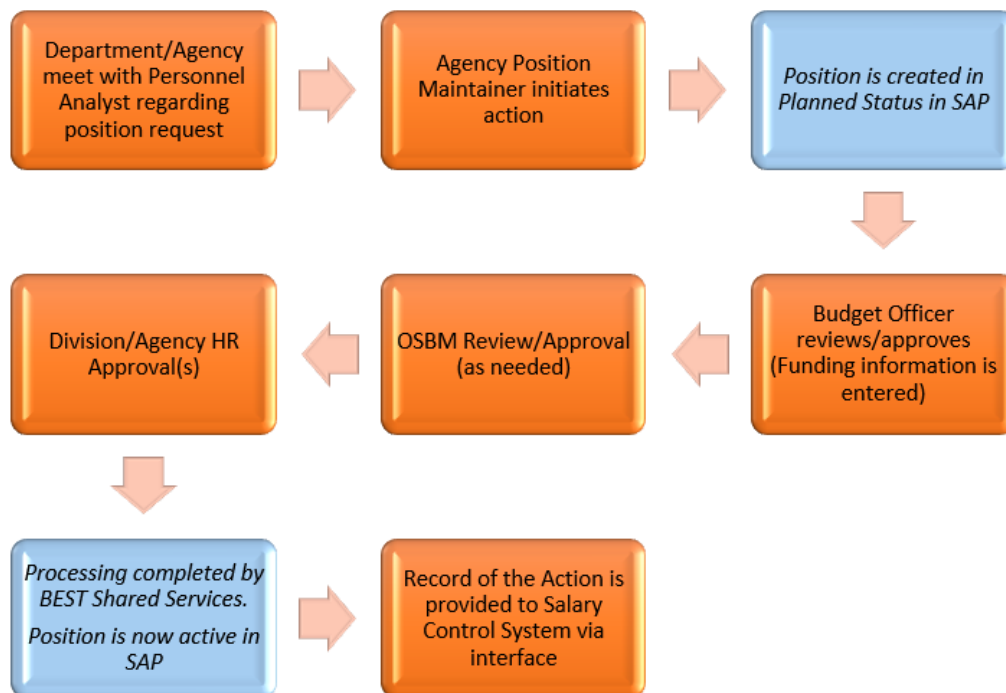
| Activity | Agency Initiator | OSBM/Division/Agency Approvers | BEST Shared Services |
|---------------------------------|---|--|--|
| Position Actions | <ul style="list-style-type: none"> Agency HR professional requests action OM Position Requester creates a position change request (PCR) for the position action in the Integrated HR-Payroll System and initiates the PCR into workflow for approvals. The information holds in planned status while in the approval process. | <p>If required, the following approval levels occur:</p> <ul style="list-style-type: none"> If needed, the OSBM Approver approves or rejects the position action. (necessary for all new/reestablished positions) Agency Salary Control Officer (Funding Approver) approves the action after entering the cost distribution and position salary or rejects the action. Division and/or Agency approver approves or rejects the position action. | <p>BEST Rep – Approves or rejects position action. Upon final approval the system converts the information to active status in the Integrated HR-Payroll System.</p> <p>NOTE: The Integrated HR-Payroll System will send a record of the action to the Salary Control System automatically for necessary updates and reporting.</p> |
| Legislative Increases | | | The Integrated HR-Payroll System Production Support team will process requests |
| Mass edit of budgeted positions | | | The Integrated HR-Payroll System Production Support team will process requests |
| Work Against | | | The Integrated HR-Payroll System Production Support team will process requests |

Position Actions

| Action | Reason | Remarks |
|---|--|---|
| Create New Position | Establishes a new position | Fund Position and Create New Position (Establish Position) are accomplished with the same action. |
| Reallocation Action | <ul style="list-style-type: none"> • Reallocate – Up • Reallocate – Down • Reallocate – Horizontal • Pay Plan Change | A Reallocation is a change in the job classification of a position. The position salary might also change on a reallocation. |
| Position Abolished | Funding for position has ended | Only BEST Shared Services can abolish a position. |
| Position Transfer | Position transfer is the movement of a position from one org unit to another. | Move a position within your organization |
| Position Hours Change | Change the number of hours for a PT position working less than 40 hours per week | This change does not change the EE Group/Subgroup field. |
| Position Employee Group/Subgroup Change | <ul style="list-style-type: none"> • FLSA change • Position Type • EPA to SPA • SPA to EPA • Full-Time to Part-Time • Part-Time to Full-Time | This is a change in the Employee Group and Employee Subgroup that may also change the position from full-time to part-time and vice versa. It may involve a change from time-limited to permanent or from FLSA subject to FLSA non-subject. |

| Action | Reason | Remarks |
|------------------|--|--|
| County Change | Change the assigned location (county) of a position. | Often the funding changes when the county changes. |
| Title Change | Maintain the position title | Processed in PO13 |
| Reporting Change | Changing the supervisor relationship of a position | Position stays in the same org unit. |

OM Position Workflow Process



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 Integrated HR-Payroll System.

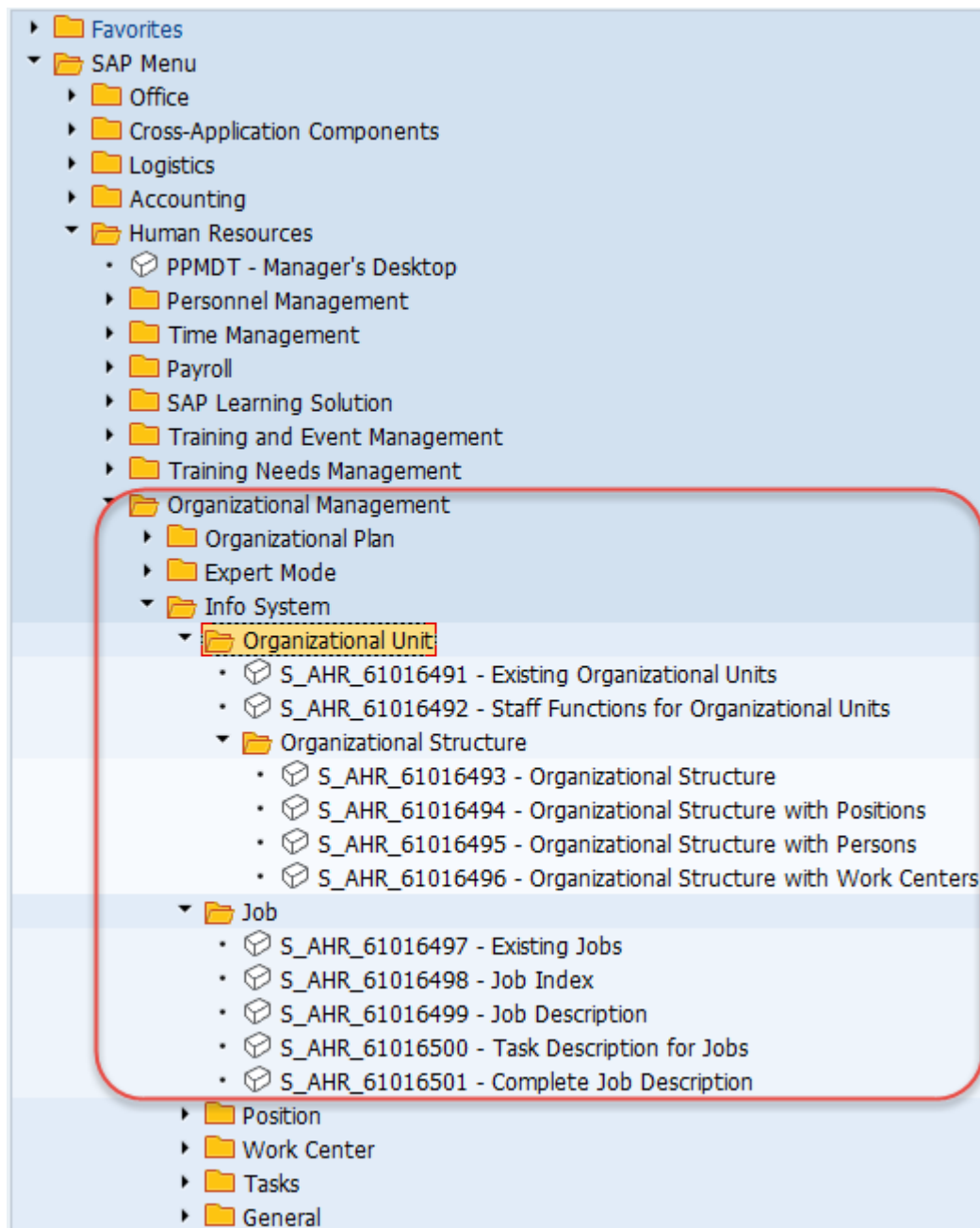
1. Department personnel meet with HR analyst to discuss a position request.
2. Agency position maintainer initiates a request for a position action.
3. Information entered in the position request is held in a planned status as it goes through the approval process in the Integrated HR-Payroll System.
4. The request is routed to the Agency Salary Control Officer/Budget Officer who enters the cost distribution and position salary. The Salary Control Officer then approves/rejects the action.
5. The request is routed to OSBM for approval (only for Create New Position actions).
6. The request is routed for all remaining required agency approvals.
7. Upon final approval by BEST Shared Services, the action is converted to active status in the Integrated HR-Payroll System.
8. A record of the action is provided to the Salary Control System for necessary updates and reporting.

OM Reporting Solutions

OM reports that are standard SAP ERP reports are available in the Integrated HR-Payroll System.

OM reports that are customized are available in the Business Objects (BOBJ) system.

OM Reports in SAP (ERP)



Examples of OM Report Transactions in the Integrated HR-Payroll System

The following table lists some standard SAP reports for Jobs, Positions, and General Information.

| SAP Transaction Code | Report Group | Report Title |
|----------------------|--------------|----------------------------------|
| S_AHR_61016497 | Job | Existing Jobs |
| S_AHR_61016495 | Job | Org. Structure with Persons |
| S_AHR_61016494 | Job | Org. Structure with Positions |
| S_AHR_61016493 | Job | Organizational Structure |
| S_AHR_61016502 | Position | Existing Positions |
| S_AHR_61018869 | Position | Periods of Unoccupied Positions |
| S_AHR_61016513 | Position | Reporting Structure with Persons |
| S_AHR_61016509 | Position | Vacant/Obsolete Positions |
| S_AHR_61016528 | General | Structure Display |
| S_AHR_61016531 | General | Display Infotypes |
| S_AHR_61016532 | General | Infotype Reporting |

Additional Resources

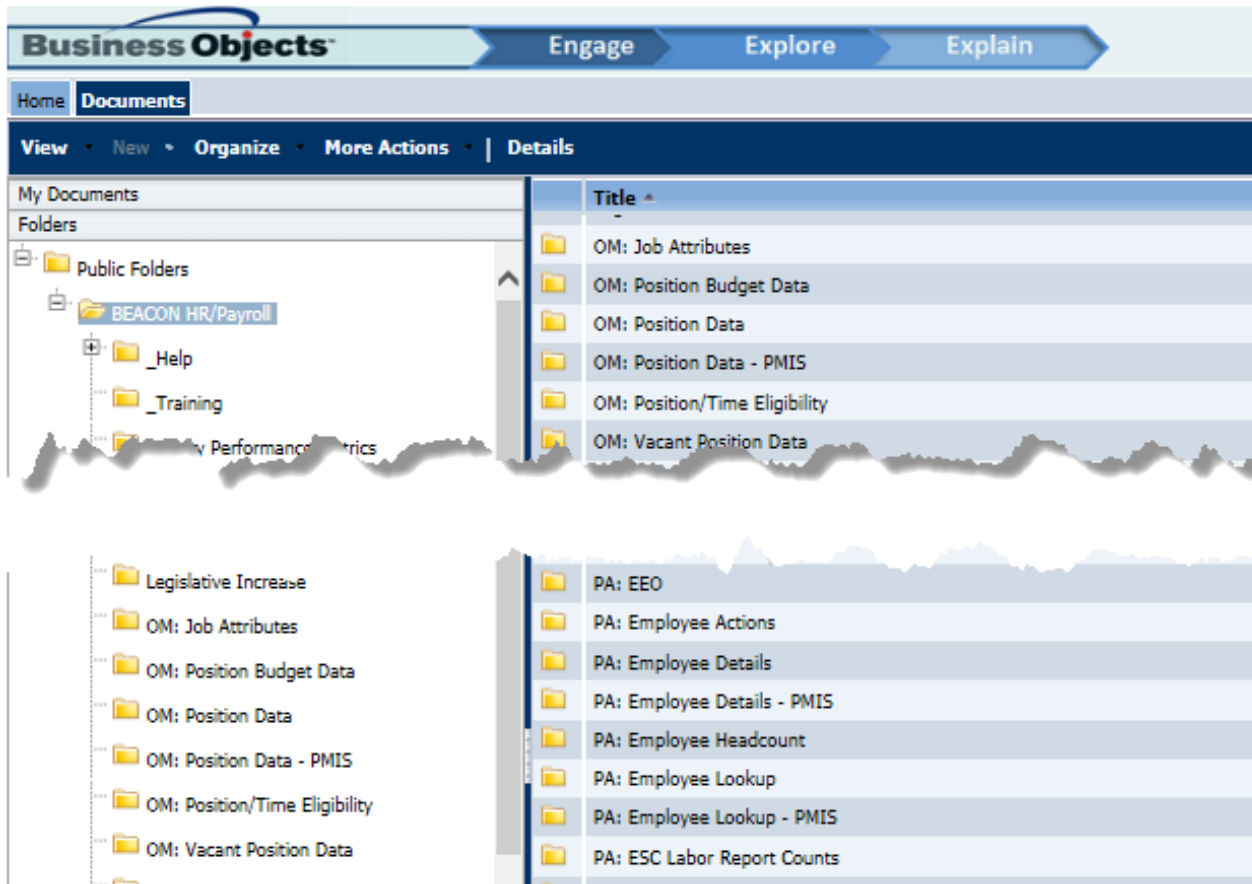
Refer to the OSC Training website in HELP documents for more information about ERP Reports.

Search for the following support document titles:

- *ERP Reports Job Aid*

OM Reports in Business Objects (BOBJ)

The Business Object (BOBJ) reports for OM are located in the Business Objects report section in the Integrated HR-Payroll System.



SUMMARY

In this lesson, you learned to:

- Identify key user roles and business process partners
- Identify OM reports

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LESSON 5: COURSE REVIEW

Course Objectives

- Define Organizational Management (OM)
- Identify components of the OM structure
- Display an organizational structure in the HR-Payroll System
- Identify OM reports

Integrated HR-Payroll System Integration



Because the Integrated HR-Payroll is an integrated system, entries made in one module affect other system components such as an employee's time, pay and benefits.

Some infotypes entered are tied directly to the employee like work weeks, schedules, addresses, and tax withholding information. Other infotypes are applied to the position and affect things like how the Integrated HR-Payroll System looks at holidays, overtime, and premium pay. OM, PA, BN, and TM settings all can affect an employee's paycheck.

Next Steps

Monitor the HR-Payroll System communication:

- BEST Shared Services web site

URL: <https://www.osc.nc.gov/state-agency-resources/customer-service-hr-payroll>

- Review conceptual materials
- Access the Training HELP site

URL: https://www.osc.nc.gov/training/training_help_documents

- Practice what you've learned

URL: <https://mybeacon.its.state.nc.us/irj/portal>

Client 899

Use your current NCID username and password

Keep your training materials close by as a ready reference.

Want to practice what you have learned from the comfort of your office?

Follow the link provided above to access the training client on the Integrated HR-Payroll System website. The training client is number 899. Your current NCID username and password are used to access the practice environment.

Need transactional assistance?

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

Course Assessment/Evaluation

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

CONGRATULATIONS!

You've completed the course!