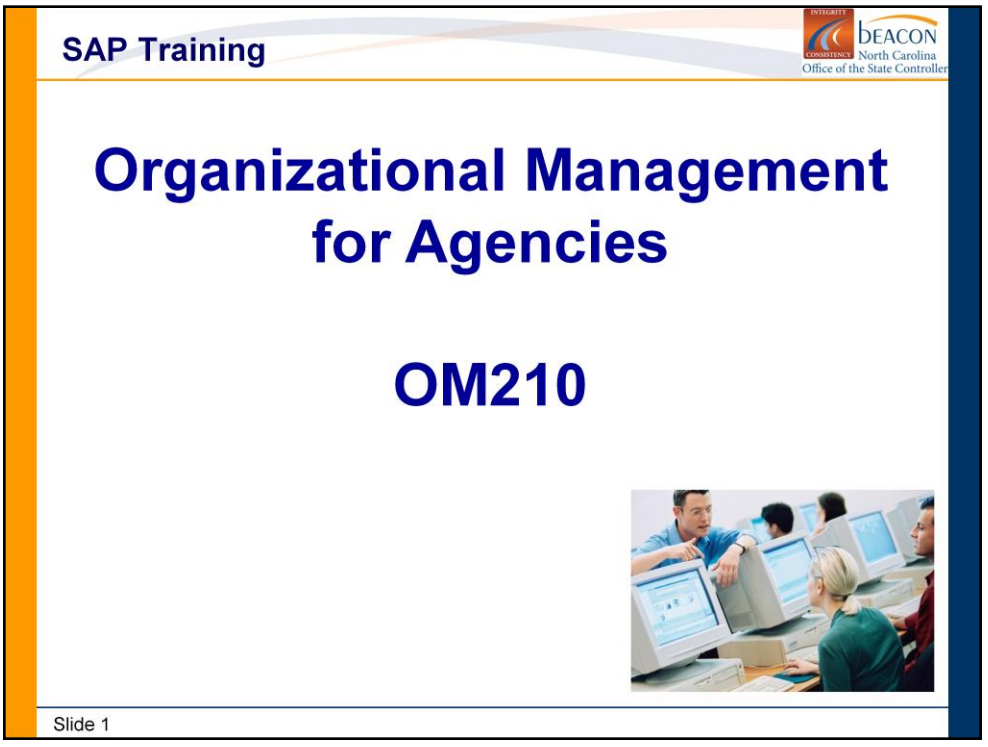
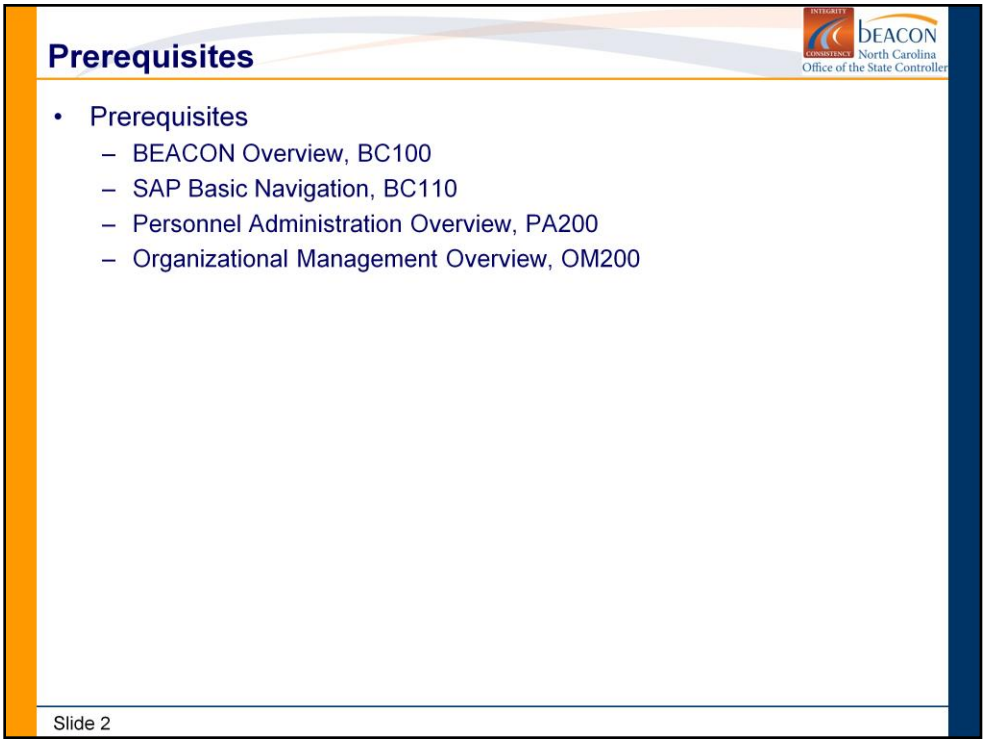


Notes:

Welcome to the BEACON SAP *Organizational Management (OM) for Agencies* training course. This course is for those individuals working at State agencies who process position actions that were known as PD118s in PMIS. 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.



Notes:

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

SAP Training — Welcome and Introductions

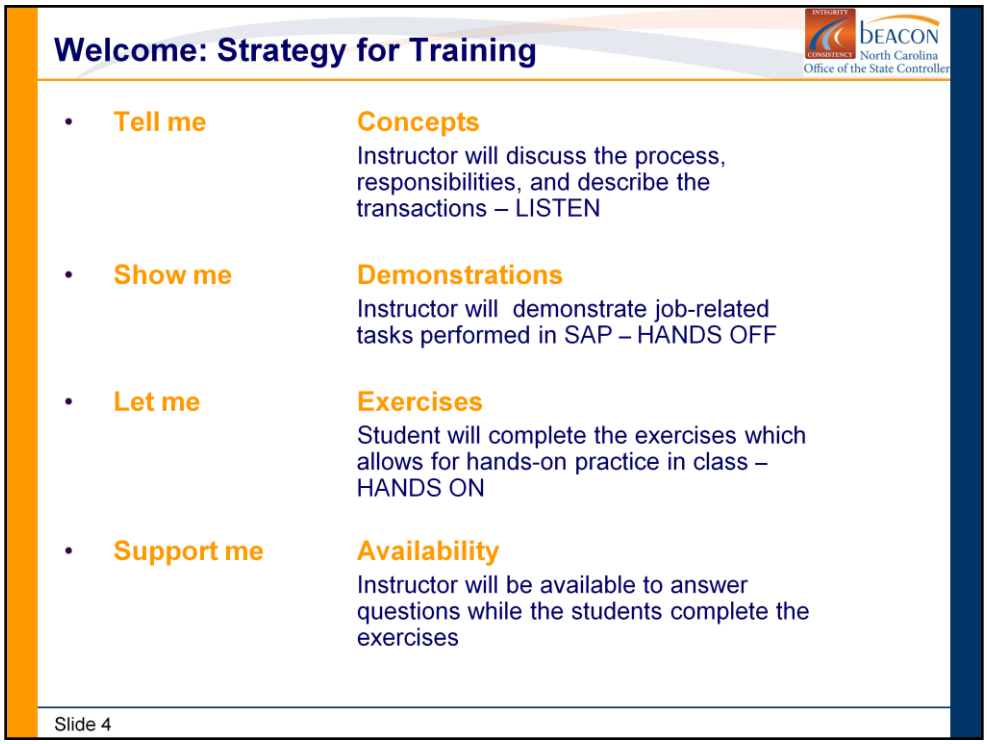
- Welcome to Organizational Management for Agencies course.
  - Introductions
  - Sign-in sheet
  - Tent cards
  - Restrooms
  - Breaks
  - Parking lot
  - Classroom etiquette
    - Cell phones off
    - No side conversations

Slide 3

Notes:

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

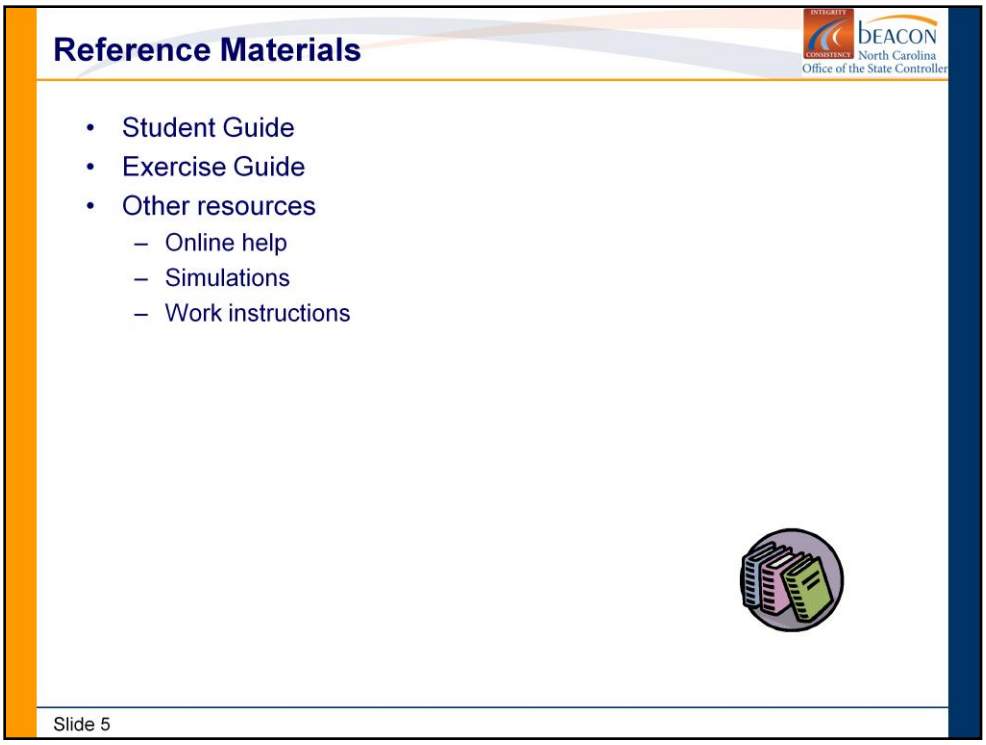
Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.



Notes:

The *Organizational Management for Agencies* Student's Guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the SAP training environment.

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



Notes:

References (job aids)

In addition to the Student Guide, these quick references are available:

- Position Actions Descriptions
- OM Infotypes Descriptions
- Field Definitions for OM Position Actions

These references are also available online through the BEACON University web site.

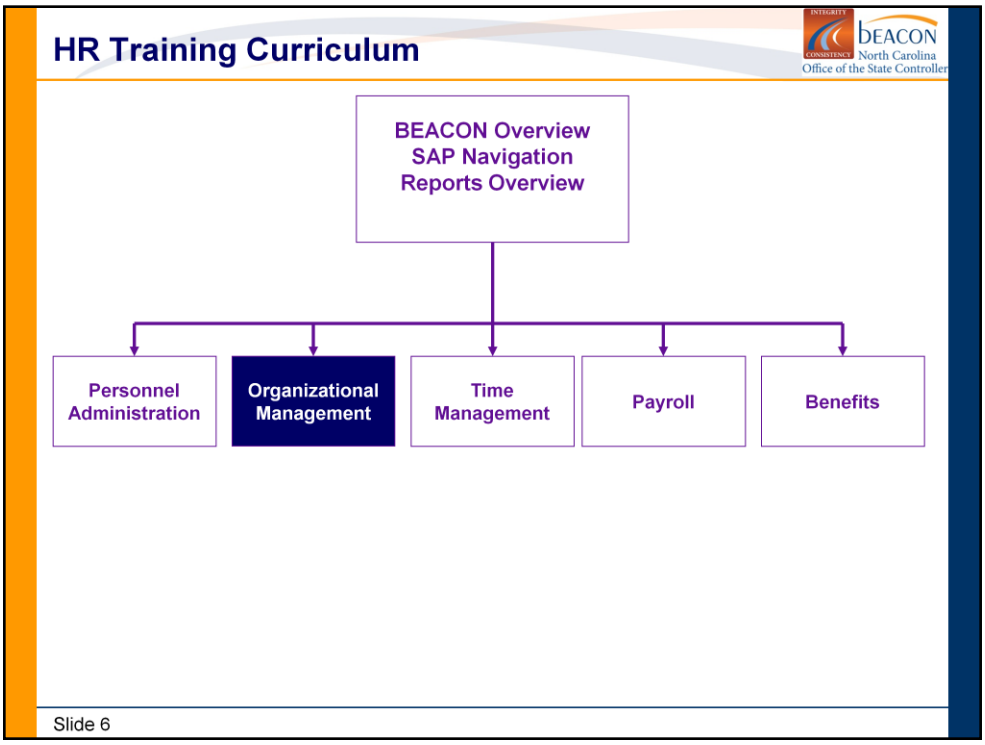
Exercise Guide

The position and job data presented in this course are “real” data. However, the position action scenarios and exercises included in this course have been created solely for the purpose of training.

Other resources

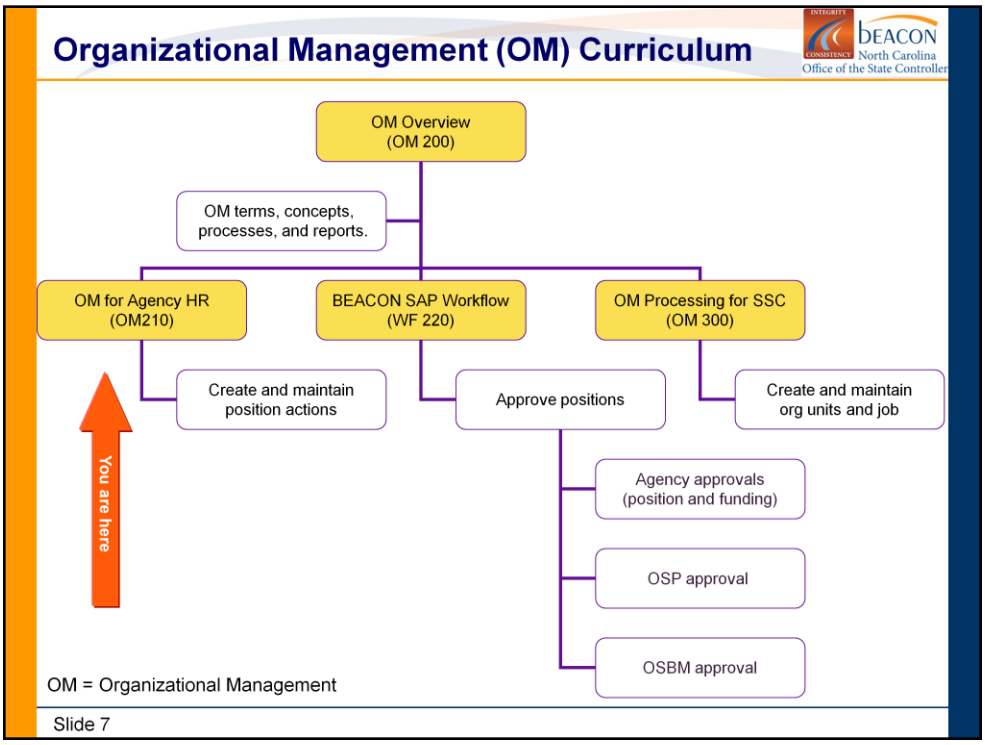
The online help:

- Provides step-by-step procedures by screen.
- Includes links to complete step-by-step procedures that you can print.
- Includes links to simulations.



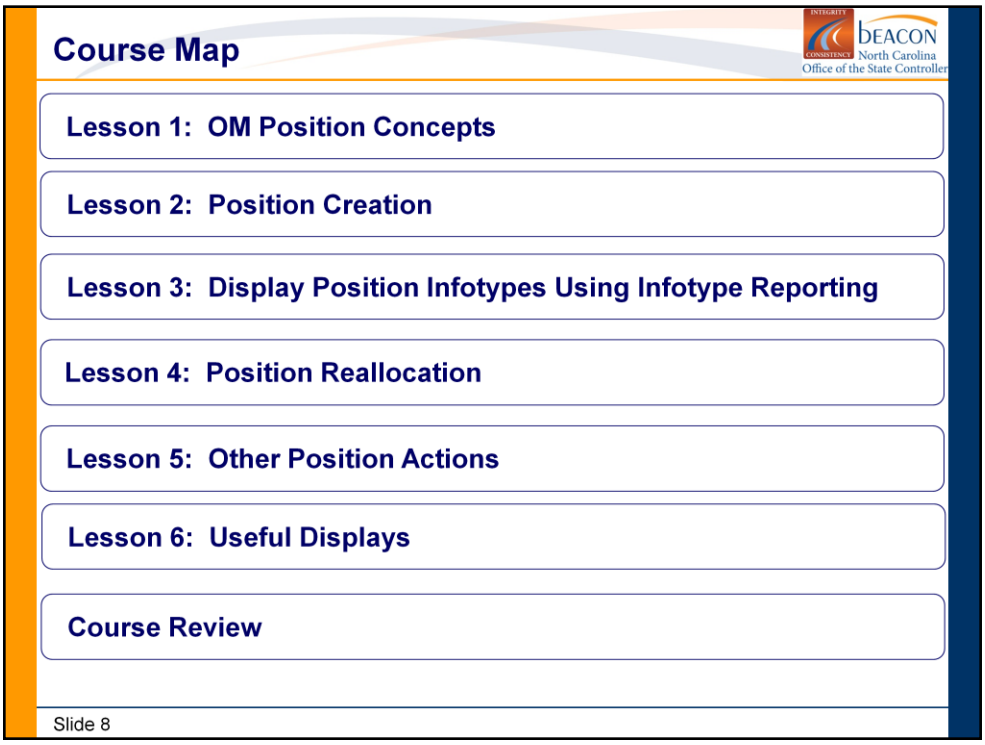
Notes:

The BEACON SAP training program is comprised of five modules. Based on your HR role, you may attend courses in several modules.



Notes:

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



Notes:

This course has six lesson modules.

Course Objectives

- Upon completion of this course, you should be able to:
  - Perform position actions using the Position Action transaction, ZOMA069
  - Perform position actions using the Maintain Position transaction, PO13
  - Display position data in planned status using the Display Infotypes transaction, RE_RHDESC10
  - Search for the status of a position action using the Infotype Reporting transaction, S_AHR_61016532
  - Display Job Families, Job Branches, and Job data using Display Infotypes transaction, RE_RHDESC10

Slide 9

Notes:

Course Map

BEACON North Carolina Office of the State Controller

- **Lesson 1: OM Position Concepts**
- Lesson 2: Position Creation
- Lesson 3: Display Position Data Using Infotype Reporting
- Lesson 4: Position Reallocation
- Lesson 5: Other Position Actions
- Lesson 6: Useful Displays
- Course Review

Slide 10

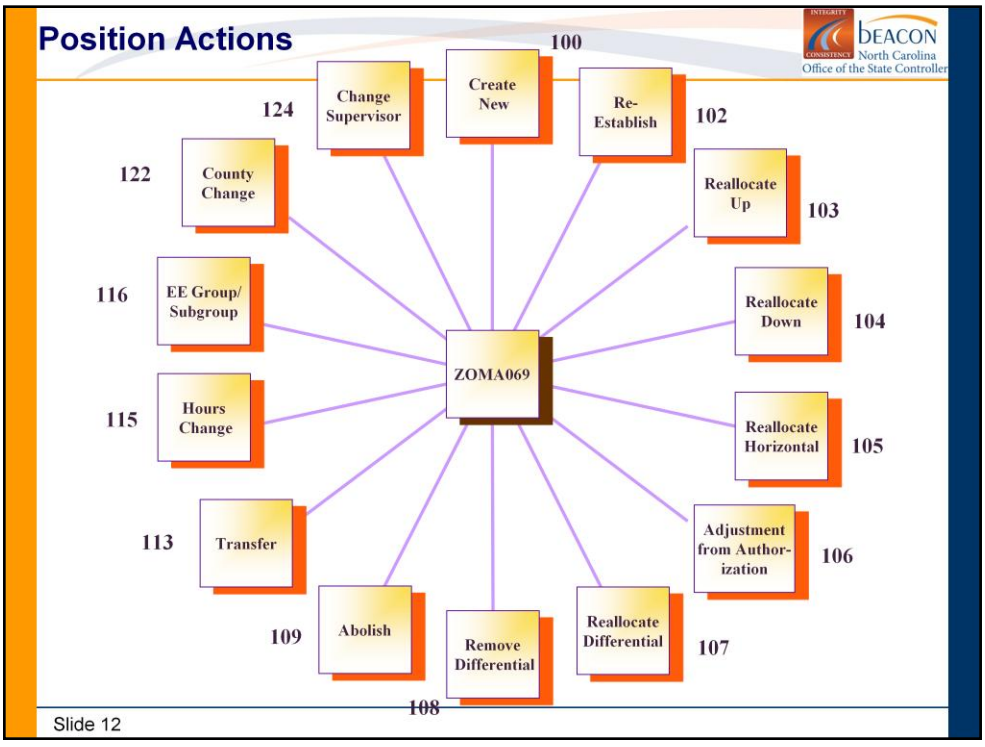
Notes:

Lesson 1 objectives

- Upon completion of this lesson, you should be able 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 SAP functions such as Personnel Administration, Payroll, and Benefits

Slide 11

Notes:



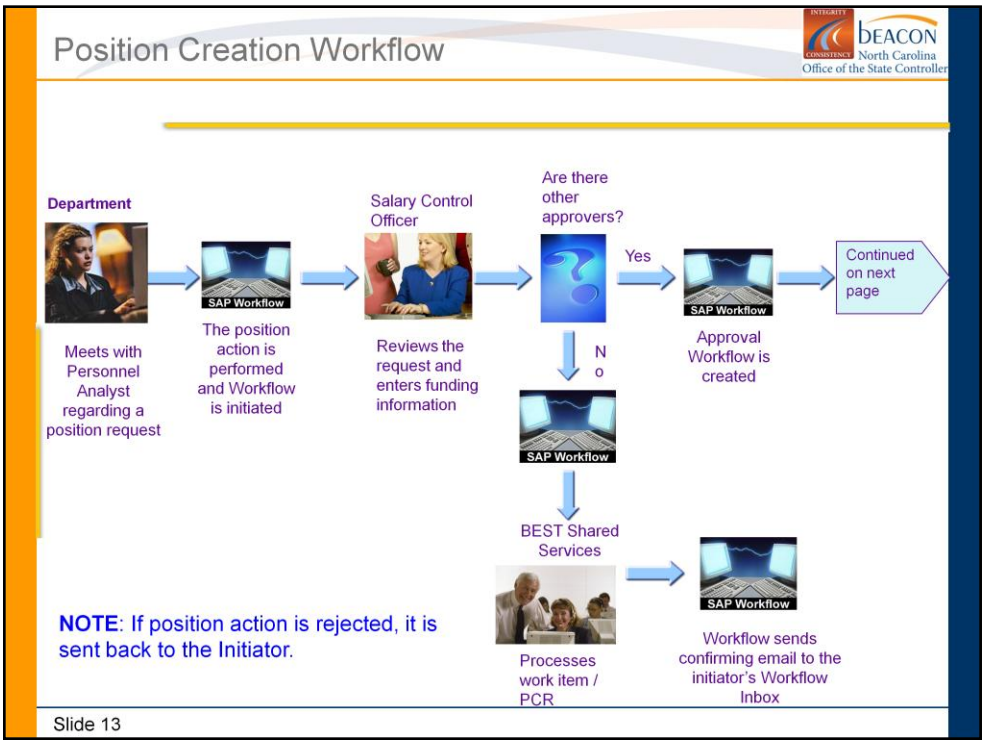
Notes:

Fourteen 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 that is available through BEACON Help.

These actions will be taught in this class:

- 100 Create New Position
- 103 Reallocate Position Up
- 104 Reallocate Position Down
- 113 Position Transfer
- 116 Position Employee Group/Subgroup Change
- 122 Position County Change
- 125 Position Working Title Change (PO13)

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



Notes:

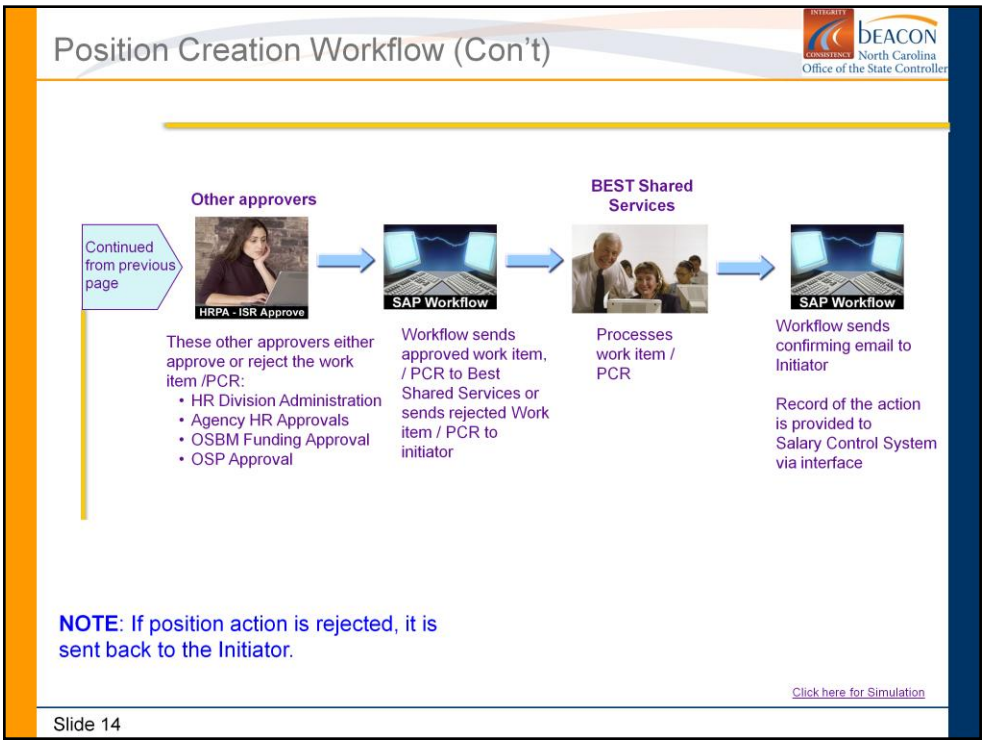
NOTE: All OM position actions entered through the ZOMA069 transaction are initiated in Workflow.

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 OSP Position approver approves or rejects position action.
- Upon final approval, the action is changed to active in the SAP by BEST Shared Services.

NOTE: SAP automatically sends a record of the action to the Salary Control System for necessary updates and reporting.

NOTE: The approver must click the decision step to sent the request to OSP. This is not an automatic action.



Notes:

Once BEST Shared Services processes a position and makes it 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).

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. (Refer to Example 1 in the Notes section.)

Slide 15

Notes:

Criticality of Validity Dates

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

Example 1: You have 25 new customer service representatives starting their employment on 8/18/2008. You will be filling 21 current positions, and creating four new positions. You can create them earlier in the summer and make the effective date match the date you create the position, or you can use 8/18/2008. Even if you don't create the position until after 8/18/2008, you still must have the position validity (begin) date no later than the date you create the position.

Example 2: The Chemist II position is reallocated up to Chemist III effective July 21, 2008. The validity (begin) date of the position reallocation would be July 21, 2008.

Conventions

- Position name
  - Apply your agency's data standards when naming the position, and in most cases the Position name is the same as the Job name.
    - Short description: up to 12 characters and is normally the Job (class) description used by OSP
    - Long description: Up to 40 characters and is known as the working title

      NOTE: Position title (long description) will be displayed in reports.
- Data Entry standards
  - It is suggested that the agency use the short description used by OSP for the position short name.
  - The long name can be customized by the agency to denote a working title.

Slide 16

Notes:

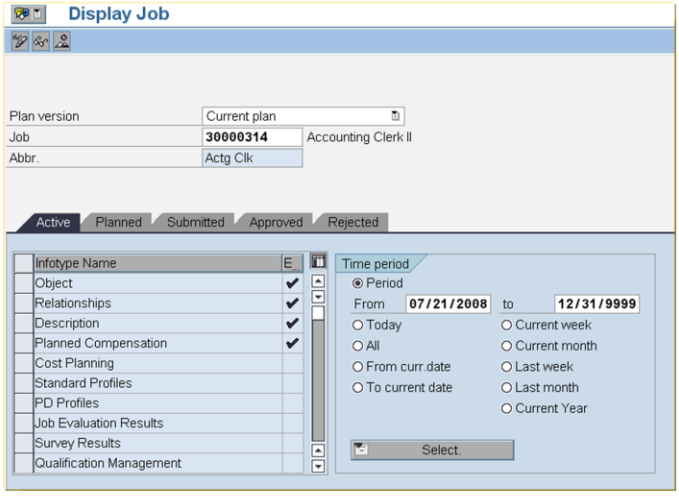
In most cases the Job and Position names will be the same. An example of an exception is for the trades job class where the position working titles are using more specific descriptors, such as Plumber, Electrician, etc.

NOTE: SAP assigns a unique eight-digit (non-intelligent) ID number to a new position.

NOTE: Use PO03D Transaction code to display the OSP short name description.

PO03D Display Job

- Use the transaction code PO03D to display all of the infotypes related to a particular job.



Slide 17

Notes:

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

Position Information Interdependencies

Position information:

- 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

Slide 18

Notes:

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
- The position title 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
- Any time management settings

Lesson Review

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 SAP functions such as Personnel Administration, Payroll, and Benefits

Slide 19

Notes:

Knowledge Check

T	F	Question
		1. The ZOMA069 transaction is for the positions actions that were known as PD118s in PMIS.
		2. All OM actions entered in the ZOMA069 transaction must be initiated in Workflow.
		3. Position names and addresses should be entered in SAP in upper case type.
		4. Position information determines how overtime, holiday, and premium pay is 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.

Slide 20

Notes:

Course Map

DEACON North Carolina Office of the State Controller

- Lesson 1: OM Position Concepts
- **Lesson 2: Position Creation**
- Lesson 3: Display Position Data Using Infotype Reporting
- Lesson 4: Position Reallocation
- Lesson 5: Other Position Actions
- Lesson 6: Useful Displays
- Course Review

Slide 21

Notes:

Lesson 2 Objectives

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

Slide 22

Notes:

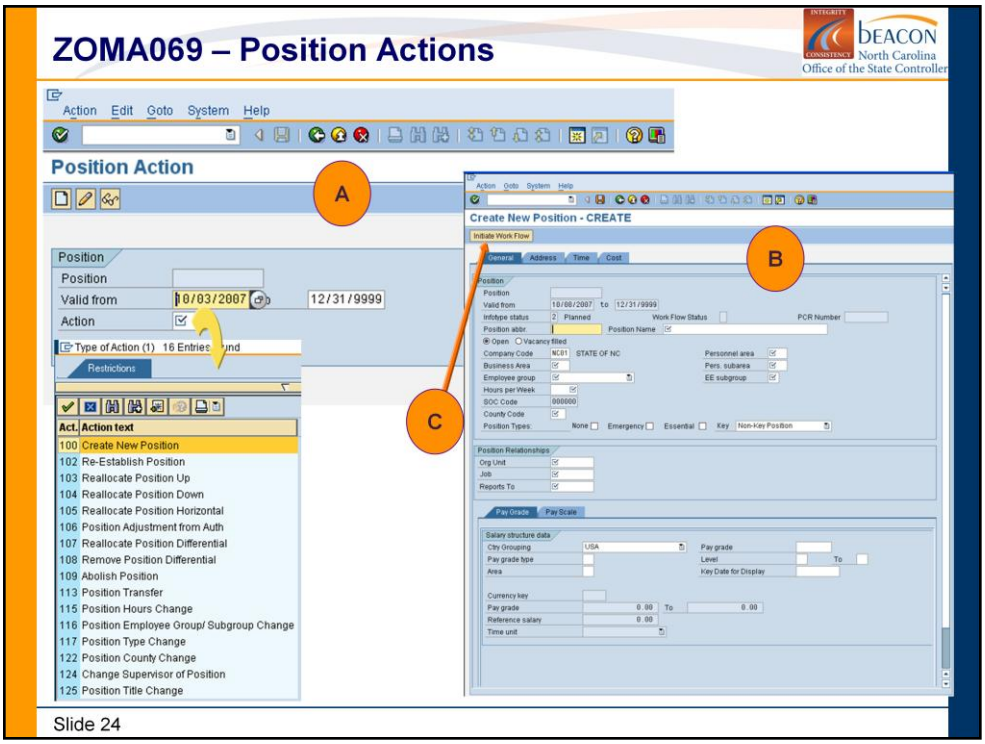
This lesson is designed to give you practice in creating new positions using the Position Action transaction. This custom transaction code, ZOMA069, provides a “user-friendly” means of accessing OM infotype screens. Also, the design is modeled after PD118 PMIS. At the conclusion of this lesson, you will have initiated the approval process for three new positions.

Actions You Perform in this Lesson

- Create a Building and Environmental Technician, full-time graded position, assigned to Cultural Resources
- Create an Administrative Assistant I, 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

Slide 23

Notes:



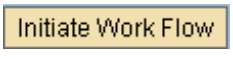
Notes:

ZOMA069 process steps:

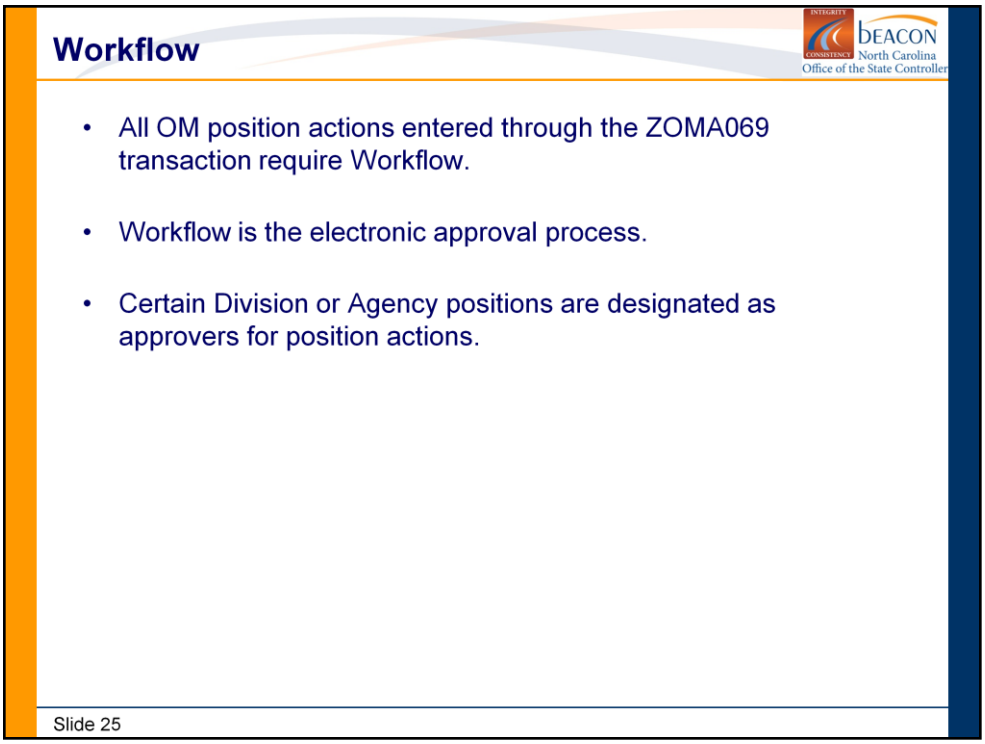
A. The first step in performing a position action is to use the ZOMA069 transaction code to access the *Position Action* screen.

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 which has SAP automatically send 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, but you will not learn how to use the Workflow Inbox. You will learn how to use the Workflow Inbox when you complete the *Workflow for OM Approvers* course.



Notes:

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).

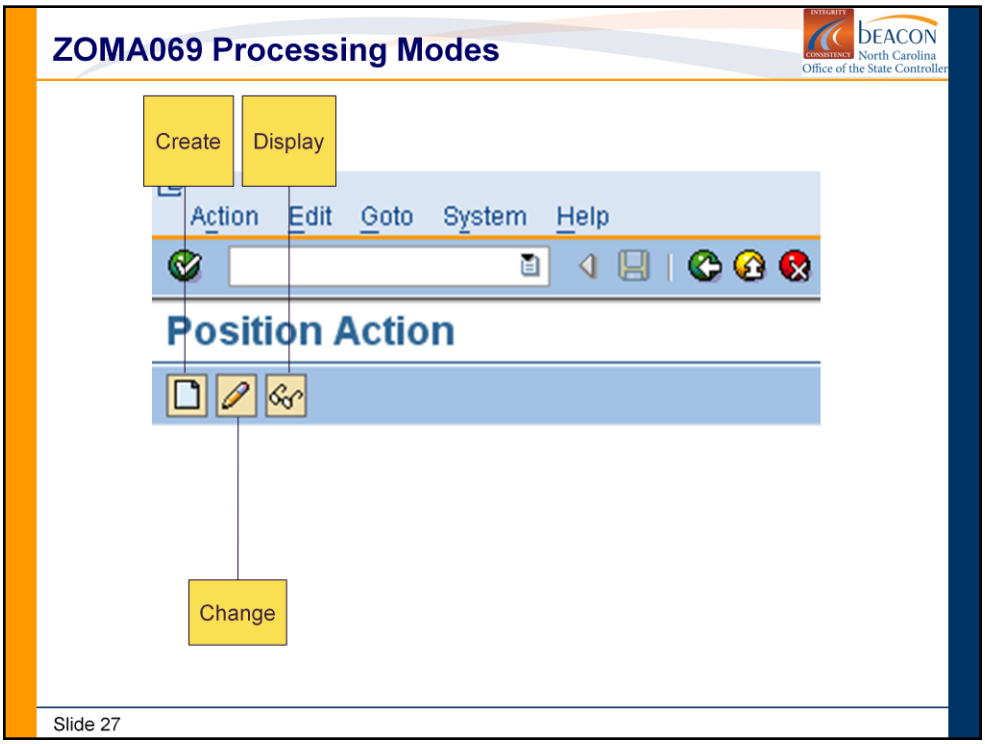
The authority to approve an action is associated with a position, and not to the person and person's role. If a person leaves an Approver Position, the authority to approve stays with the position. A person who is subsequently assigned to that position assumes the approval authority (unless the position is changed by security).

PCR Number

- Once you initiate Workflow for a position action, SAP 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

Slide 26

Notes:



Notes:

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.
- **Display**: View an individual position action.

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

2:1 – Exercise – Log on to SAP

Log on to SAP

– In this exercise, you are going to log on to the SAP training client.

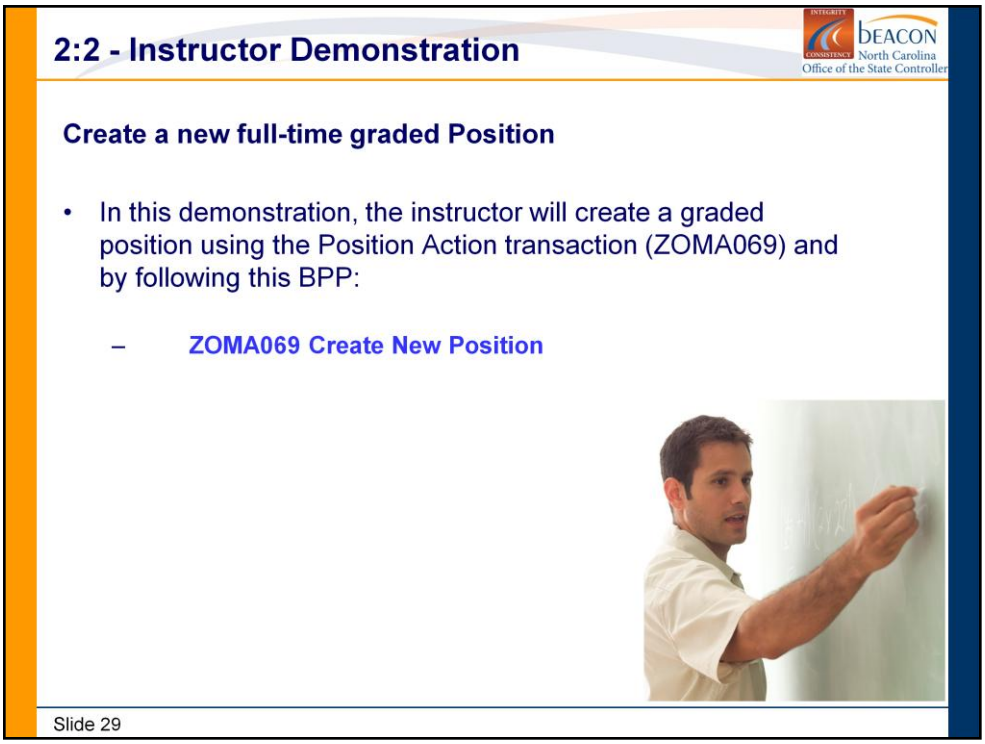
- Instructions
  1. Log on to the SAP training client using the User ID and password that has been provided by the instructor.

Slide 28

Notes:

Use the data provided by your instructor to complete the exercise.

Refer to the Exercise Guide for this course for the step-by-step log-on instructions.



Notes:

In a moment, the instructor will access a BPP (eAssistant) and demonstrate how to create a new full-time graded position. The position that the instructor will create is the **Building & Environmental Technician,** a full-time graded position 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 the instructor progresses 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 graded position. For more information, a *Glossary of OM Fields* is available on the BEACON University website.

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.

2:3 - Exercise

DEACON North Carolina Office of the State Controller

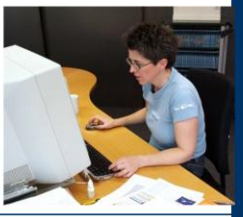
Create a New Full-time Graded Position

The Western office of the History Department of Cultural Resources has requested that the Building & Environmental Technician_XX position be created. The personnel analyst has met with the manager and has determined that the position:

- Will be available the first day of the next calendar quarter.
- Is a permanent, full-time position working forty hours per week.
- Is subject to FLSA overtime.
- Is non-essential.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.



Slide 30

Notes:

In this exercise, you will create a full-time grade **Building & Environmental Technician_XX** position assigned to Cultural Resources.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

2:4 - Instructor Demonstration

BEACON North Carolina Office of the State Controller

Display a Position

- In this demonstration, the instructor will display the graded Building & Environmental Technician position that was created in the previous demonstration using the Position Action transaction (ZOMA069).
- The instructor will use the following BPP:
  - **ZOMA069 Display a Position**

Slide 31

Notes:

In a moment, the instructor will demonstrate how to display position information using ZOMA069.

The position that the instructor will display is the **Building & Environmental Technician** position that was created in the previous demonstration.

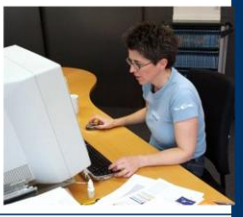
2:5 - Exercise

Display a Position

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

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.



Slide 32

Notes:

In this exercise, you will display the **Building & Environmental Technician** position that you created in 2:3 Exercise.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

What do you do if you have . . .

- Not received all of the information from the Personnel Analyst to complete the position action?
- Inadvertently entered the wrong information?
- Received additional information, such as courier address for a position?

Slide 33

Notes:

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.

2:6 - Exercise

Create a New Part-time Graded Position

The Marketing Department of the Department of Agriculture has requested the Administrative Assistant I 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 twenty 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.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.

Slide 34

Notes:

In this exercise, you will create a part-time graded **Administrative Assistant I** position assigned to the Department of Agriculture.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

Initiate Workflow

- Before you initiate Workflow, you may access the *Create New Position* action using the Change mode to modify or add data.
- After 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.

Slide 35

Notes:

2:7 - Instructor Demonstration

Change a Position Before Initiating Workflow

- In this demonstration, the instructor will change the position information by adding the courier address for the Administrative Assistant I position. The instructor will use the following BPP:
  - **ZOMA069 Change a Position**

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Notes:

In a moment, the instructor will demonstrate how to change position information using the Position Action transaction (ZOMA069). The position that the instructor will add the courier address to the **Administrative Assistant I** position was created in the previous exercise.

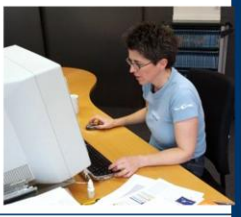
2:8 - Exercise

Change a Position Before Initiating Workflow

The Personnel Analyst just emailed you the courier address information for the Administrative Assistant I position that you created in 2:6 - Exercise.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.



Slide 37

Notes:

In this exercise, you will change the **Administrative Assistant I** position that you created in 2:6 - Exercise. Specifically, you will add the courier address information and then initiate Workflow.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

Assignment of SOC Codes

- It is the responsibility of each agency/university to assign Standard Occupational Classification (SOC) codes when creating a new **banded** position.
- BEACON automatically assigns SOC codes for **graded** positions

Slide 38

Notes:

- The Standard Occupational Classification (SOC) code is an occupational classification used by the State of North Carolina.
- The BEACON system automatically assigns the SOC code for actions that involve **graded** positions.
- 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.

2:9 - Instructor Demonstration

BEACON North Carolina Office of the State Controller

Create a New Part-time Banded Position

- In this demonstration, the instructor will create a banded position using the Position Action transaction (ZOMA069).
- The instructor will use the following BPP:
  - **ZOMA069 Create New Position**

Slide 39

Notes:

The instructor will demonstrate how to create a banded position. The position that the instructor will create is a part-time banded **Paralegal** position for the Legal Division of the Department of Commerce. As the instructor progresses through the General tab, 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.

2:10 - Exercise

DEACON North Carolina Office of the State Controller

Create a New Part-time Banded Position

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.
- Is described by the Paralegal job.
- Is located at the main address of 301 N Wilmington St, Raleigh, NC 27699.
- Can be reached through the MSC 4301 courier route or at 919-716-6865.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.

Slide 40

Notes:

In this exercise, you will create a part-time, banded **Paralegal** position assigned to the Legal Division of Justice.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

Knowledge Check

- You have discovered that you have not entered a courier address. How would you correct this situation?

Slide 41

Notes:

Lesson Review

In this lesson, you learned to create both graded and banded positions using the Position Actions transaction.

Slide 42

Notes:

Course Map

Lesson 1: OM Position Concepts

Lesson 2: Position Creation

Lesson 3: Display Position Data Using Infotype Reporting

Lesson 4: Position Reallocation

Lesson 5: Other Position Actions

Lesson 6: Useful Displays

Course Review

Slide 43

Notes:

Lesson 3 Objectives

After completing 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

Slide 44

Notes:

Actions You Perform in this Lesson

- Display the position infotypes for these positions:
  - Paralegal
  - Building and Environmental Technician
  - Administrative Assistant I

Slide 45

Notes:

Key Terms

- Infotype - used in SAP HR 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 Compensation1005 - 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
  - Example:
    - 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

Slide 46

Notes:

List of Required Position Infotypes

Infotype	Number
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 Code	9022
Position Types	9023
OM Actions (This infotype is created when a position action has occurred.)	9000

Slide 47

Notes:

Take a moment to review the *OM Infotypes* reference. 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 slide are required for a Position to exist in SAP.

List of Conditional and Optional Infotypes

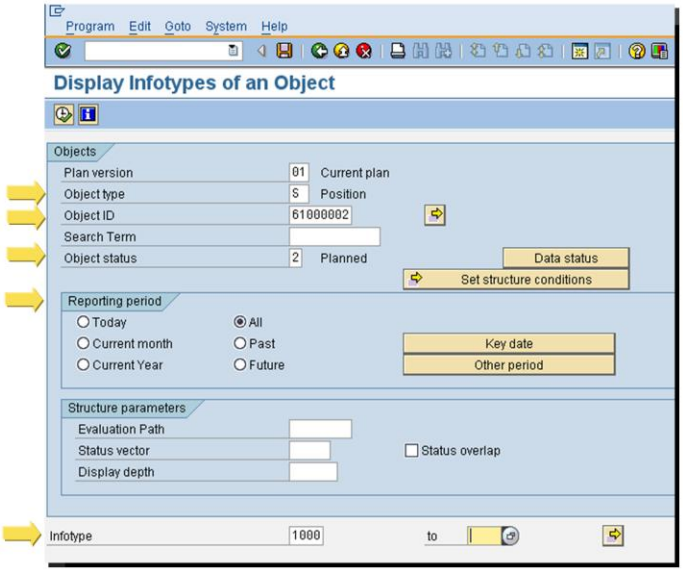
Infotype	Number
Overtime Compensation	9005
Holiday Payout Period	9006
Night Shift Premium	9007
Evening Shift Premium	9008
Weekend Shift Premium	9009
Holiday Premium Rate	9010
On-call	9011
Callback	9012
Extended duty	9016
Vacancy posting data	9025
Reference Position Number (for PMIS positions)	9021
(optional)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

Slide 48

Notes:

The infotypes listed on this slide 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.

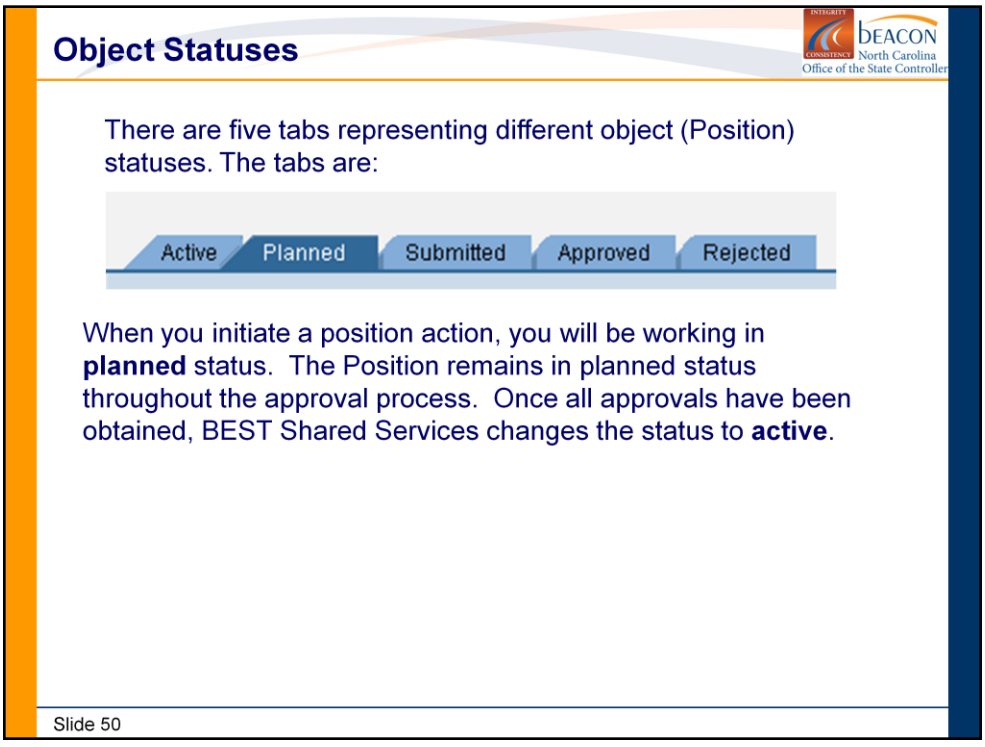
RE_RHDESC10 _ Display Infotypes



Slide 49

Notes:

Transaction code RE_RHDESC10 allows you to display the infotypes that have been created in planned status using the ZOMA069 transaction. This is the image of the initial screen. Once you have entered the position and the infotype information, the List Display “Infotype name” screen is displayed.



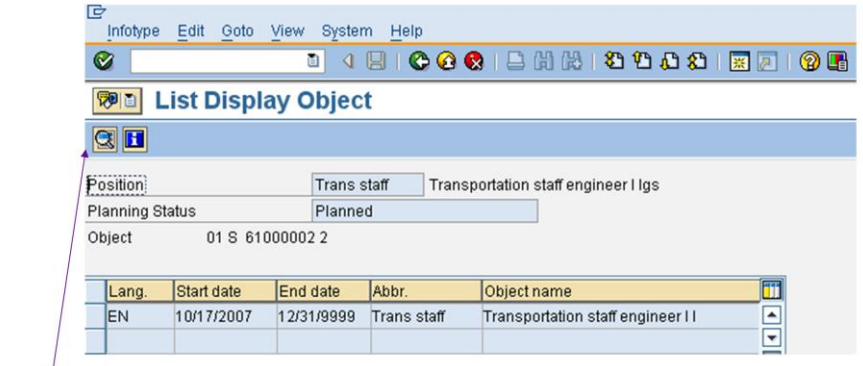
Notes:

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.
  - Do not display in standard reports for active Positions.
  - Cannot hold employees.
  - Are Positions that require approval or are approved but not processed 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 cancelled in Workflow, the position infotypes are moved to rejected status.

NOTE: The Submitted and Approved statuses as depicted on the slide image are not used by BEACON.

Standard Drill Down



Highlight the line and click the Choose button to "drill down" to the specific infotype record.

Slide 51

Notes:

3:1 - Instructor Demonstration

BEACON North Carolina Office of the State Controller

Display Position Infotypes (Single Selection)

- In this demonstration, the instructor will display the SOC Code infotype created in planned status for the Paralegal position. The instructor will use the following BPP:
  - **RE_RHDESC10 Display Position Infotypes**

Slide 52

Notes:

The instructor will access a BPP and demonstrate how to view position infotypes. The position for which the instructor will display the SOC code infotype is the Paralegal position created in the previous exercise.

Single selection means that the report will be generated for one position and display one infotype.

For more information, the *OM Infotypes* reference is available on the BEACON University website.

3:2 - Exercise

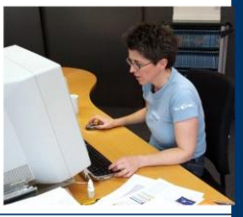
Display Position Infotypes (Single selection)

Earlier today, you initiated the Workflow for the Paralegal position that you created for Justice. You now want to verify that the SOC code is correct. You can do this using the Display Infotypes transaction, RE_RHDESC10.

For this exercise, verify that your data entries match the SOC code in the data table for 2:10 - Exercise.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.



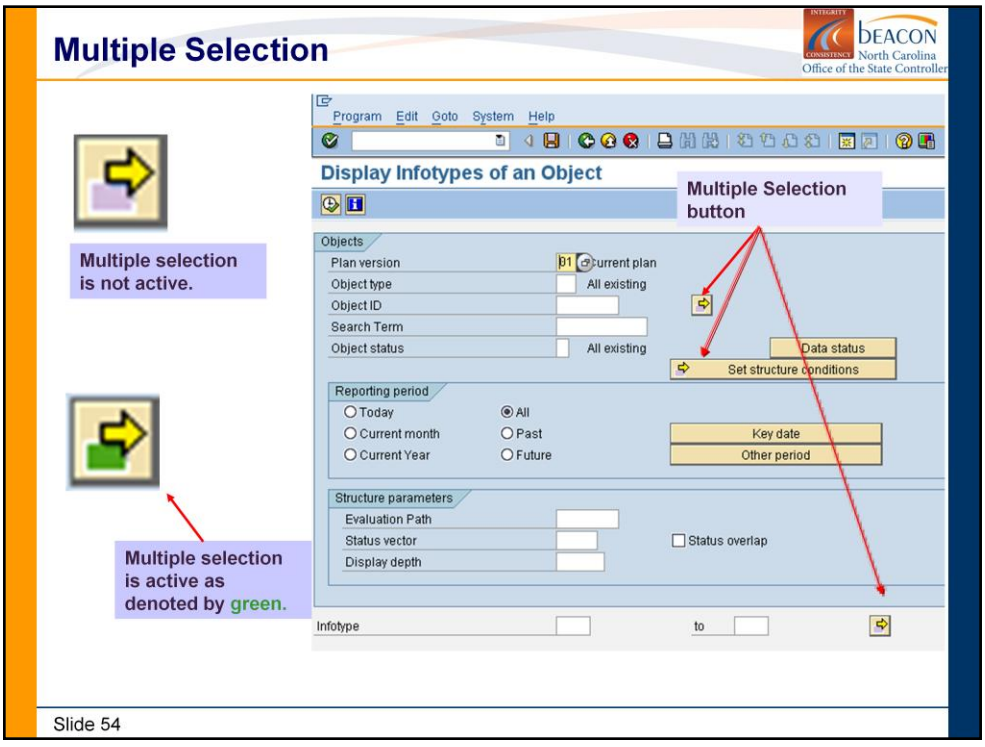
Slide 53

Notes:

In this exercise, you will display the infotypes that have been created in planned status for new Paralegal position that you created in 2:10 - Exercise.

Use the information and data provided in the Exercise Guide to complete the exercise.

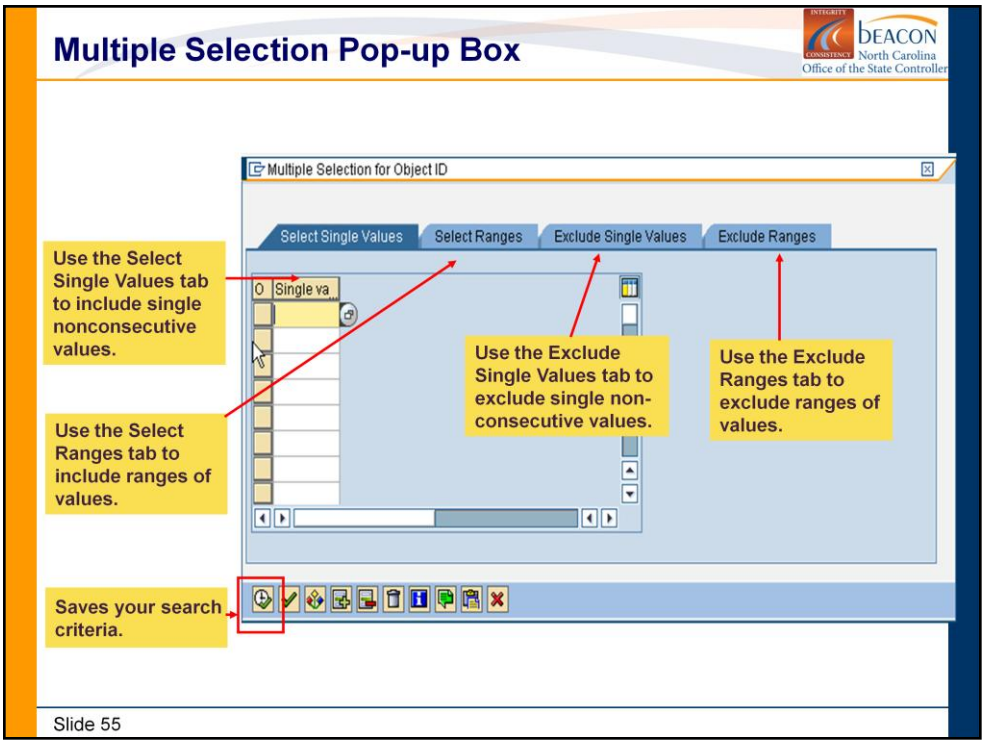
Also use eAssistant (BPP) for step-by-step instructions.



Notes:

The purpose of this slide is to familiarize you with the basic elements of multiple selection searches. You may need to generate reports using a more complex set of search criteria. For example, you might need to display infotypes for a series of nonconsecutive position numbers. To do this, SAP provides you with multiple selection search options on most search criteria selection screens. The availability of such an option is indicated by the presence of the *Multiple Selection* button.

The *Multiple Selection* button displays to the right of the search field(s) for which it may be used, following along from left to right across the screen. If the *Multiple Selection* button is not there, it means that multiple selections are not available for the field(s) on that line. If the Multiple Selection arrow is **green**, it indicates that complex search options have already been selected.



Notes:

You can access the *Multiple Selection* screen by clicking on the *Multiple Selection* button from any basic search screen. The *Multiple Selection* button allows you to use these types of selection criteria for reporting:

- Include or exclude individual nonconsecutive values
- Include or exclude multiple ranges values

Most of the time, the *Multiple Selection* button can be accessed either before or after entering your values in the fields on the basic search selection screen. Occasionally, you will be forced to enter a value before clicking on the Multiple Selection button.

3:3 - Instructor Demonstration

BEACON North Carolina Office of the State Controller

Display Position Infotypes (Multiple Selection)

- In this demonstration, the instructor will display the infotypes that were created in planned status for multiple Positions. The instructor will use the following BPP:
  - **RE_RHDESC10 Display Position Infotypes**

Slide 56

Notes:

In a moment, the instructor will access a BPP and demonstrate how to view all infotypes that were created in planned status for multiple Positions.

As the instructor progresses through each infotype, observe the field names and definitions on the individual tabs so that you can become familiar with the various types of information stored on the screen.

For more information, the *OM Infotypes* reference is available on the BEACON University website.

3:4 - Exercise

DEACON North Carolina Office of the State Controller

Display Position Infotypes (Multiple selections)

- Earlier today, you initiated the Workflow for three Positions. You now want to verify that the information was entered correctly. You can do this using the Display Infotypes transaction, RE_RHDESC10.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.

Slide 57

Notes:

In this exercise, you will display the infotypes that have been created in planned status for the Positions that you created in the 2:3, 2:6, and 2:10 Exercises.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant for step-by-step instructions.

Knowledge Check – Lesson 3

Which infotype. . .	Answer (Infotype)
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?	

Slide 58

Bonus question: Which SAP transaction that you learned in the Organizational Management Overview course also displays position information that is in active status?

Notes:

Lesson Review

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

Slide 59

Notes:

Course Map

BEACON North Carolina Office of the State Controller

- Lesson 1: OM Position Concepts
- Lesson 2: Position Creation
- Lesson 3: Display Position Data Using Infotype Reporting
- **Lesson 4: Position Reallocation**
- Lesson 5: Other Position Actions
- Lesson 6: Useful Displays
- Course Review

Slide 60

Notes:

Lesson 4 Objectives

After completing this lesson, you should be able to use the Position Actions transaction (ZOMA069) to:

- Reallocate a Position up
- Reallocate a Position down

Slide 61

Notes:

Actions You 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.

Slide 62

Notes:

4:1 - Instructor Demonstration

BEACON North Carolina Office of the State Controller

Reallocate a Position Up

- In this demonstration, the instructor will reallocate up the position Historic Preservation/Restoration Specialist I from a grade 68 to grade 70. The instructor will use the following BPP:
  - **ZOMA069 Reallocate Position Up**

Slide 63

Notes:

In a moment, the instructor will demonstrate how to reallocate up the Historic Preservation/Restoration Specialist I position from a grade 68 to 70.

4:2 - Exercise

BEACON North Carolina Office of the State Controller

Reallocate a Position Up

- A decision has been made to reorganize the the Historic Preservation area of Cultural Resources, specifically the Historic Preservation/Restoration Specialist I position, Org unit ID 20010227. The Historic Preservation/Restoration Specialist I is being reallocated up to Historic Preservation/Restoration Specialist II position. Your agency's personnel analyst has asked you to perform the position action 103, Reallocate Position Up.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.

Slide 64

Notes:

In this exercise, you will reallocate a position up.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

4:3 - Exercise

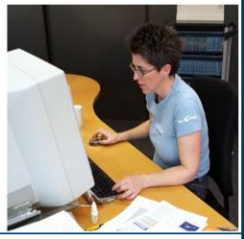
DEACON North Carolina Office of the State Controller

Reallocate a Position Down

- A decision has been made to reallocate down the temporary position Program Assistant IV to a temporary Processing Assistant II, job grade 59 to 54, that belongs to Grants and Communication.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.



Slide 65

Notes:

In this exercise, you will reallocate a position down.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

Lesson Review

In this lesson, you learned to use the Position Actions transaction, ZOMA069 to:

- Reallocate a position up
- Reallocate a position down

Slide 66

Notes:

Course Map

Lesson 1: OM Position Concepts

Lesson 2: Position Creation

Lesson 3: Display Position Data Using Infotype Reporting

Lesson 4: Position Reallocation

Lesson 5: Other Position Actions

Lesson 6: Useful Displays

Course Review

Slide 67

Notes:

Lesson 5 Objectives

After completing 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

Slide 68

Notes:

Actions You Perform in this Lesson

- Transfer a position from one agency to another.
- 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

Slide 69

Notes:

5:1 - Instructor Demonstration

Transfer a Position

- In this demonstration, the instructor will transfer a position to another agency. Specifically, a full-time Processing Assistant V position at Juvenile Justice is being transferred the fifteenth of next month to Cultural Resources. The instructor will use the following BPP:
- **ZOMA069 Position Transfer**

Slide 70

Notes:

In a moment the instructor will demonstrate how to transfer a position to another org unit.

5:2 - Exercise

DEACON North Carolina Office of the State Controller

Transfer a Position to Another Agency

- Due to expansion, the full-time Processing Assistant V position at Juvenile Justice is being transferred the fifteenth of next month to Cultural Resources.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.

Slide 71

Notes:

In this exercise, you will transfer a position to another agency.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant for step-by-step instructions.

5:3 - Instructor Demonstration

DEACON North Carolina Office of the State Controller

Change the Employee Group and Employee Subgroup Assigned to a Position

- In this demonstration, the instructor will modify the Employee Group and Employee Subgroup assigned to the Historic Preservation/Restoration Supr position. Funding has been secured to modify the position from part-time to full-time status. The instructor will use the following BPP:
- **ZOMA069 Position Employee Group / Subgroup Change**

Slide 72

Notes:

In a moment, the instructor will demonstrate how to modify the Employee Group and Employee Subgroup assigned to a position. In this scenario, funding has been secured to modify the part-time **Historic Preservation/Restoration Supr** position to full-time status. This event necessitates a modification to only the Employee Group and Employee Subgroup assigned to the position.

5:4 - Exercise

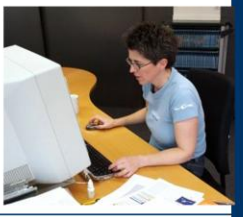
DEACON North Carolina Office of the State Controller

Change the Employee Group and Employee Subgroup Assigned to a Position

- Funding has been secured to modify the part-time Historic Preservation/Restoration Supvr position to full-time status. This event necessitates a modification in the Employee Group and Employee Subgroup fields.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.



Slide 73

Notes:

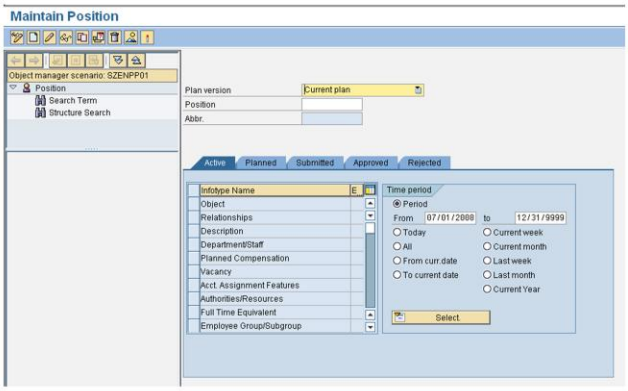
In this exercise, you will change the Employee Group and Subgroup assigned to a position.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

PO13 - Maintain Positions

Position actions that do not need to go through the Workflow approval process are created with the PO13 – Maintain Positions transaction. Those actions include Employee Group/Subgroup changes and Title changes.



Slide 74

Notes:

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 processing or viewing is needed.
5. The infotype is displayed in the requested mode.

Be sure to check BEACON Help on the BEACON Training website to access the Business Process Procedures (BPPs) for detailed procedures for the PO13 transaction.

Position Actions Involving Workflow

OM Position Process	Input Method
New Position/Fund Position	On-line request and workflow
Reallocation Actions	On-line request and workflow
Abolish & Re-establish	On-line request and workflow
Position Transfer	On-line request and workflow
Position Hours Change	On-line request and workflow
Position Type Change	Update Directly in SAP
County Change	On-line request and workflow
Supervisor Change	On-line request and workflow
Position Address Change	Update Directly in SAP
Position Time Settings Change	Update Directly in SAP
Position Working Title Change	Update Directly in SAP
Cost Distribution Change	Update Directly in SAP (unless part of another OM Action)
Budgeted Salary Change	Update Directly in SAP (unless part of an OM or PA Action)

Slide 75

Notes:

Position Naming Convention

- You can use the Position Action transaction to enter a working title for a position.
- Position name long text is to be entered using title case, with capitalized Roman numerals. The long name can be customized by the agency to denote a working title.
  - Example: Transportation Worker V
- It is suggested that the agency use the short description used by OSP for the position short name.

Slide 76

Notes:

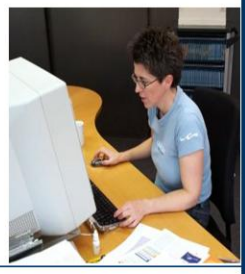
5:5 - Exercise

Change the County Assignment for a Position

- The county assignment for the Historic Preservation/Restoration Specialist II position in Cultural Resources needs to be changed from Wake to Durham.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.



Slide 77

Notes:

In this exercise, you will change the county assigned to a position.

Use the information and data in the Exercise Guide to complete the exercise.

Also use eAssistant for step-by-step instructions.

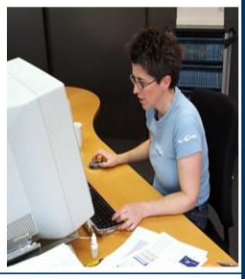
5:6 - Exercise

Change the Title of a Position

- A request has been made to change the Office Assistant III title to the working title Salary Administrator.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.



Slide 78

Notes:

In this exercise, you will change a position's working title.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

Knowledge Check – Lesson 5
Which position action should you use?

	Event	Action
1.	In an Organizational restructure, the Training Manager position now reports to the Director of Change Management, a new position.	
2.	The Quality Technician position is being transferred from Forsyth county to Guilford county.	
3..	In an organizational restructure, the XYZ project is completed; therefore the XYZ Project Manager position is no longer needed.	
4.	The number of hours per week of a part-time position is changing but the appointment type (Employee Group field) and the FSLA 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.	

Slide 79

Notes:

Take a few minutes and choose the position action that should be performed for each business event. If needed, please refer to the *Position Action Descriptions* reference that is available through the BEACON University web site.

Lesson Review

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

In this lesson, you learned to use the Maintain Position transaction (PO13) to:

- Change the title of a position

Slide 80

Notes:

Course Map

Lesson 1: OM Position Concepts

Lesson 2: Position Creation

Lesson 3: Display Position Data Using Infotype Reporting

Lesson 4: Position Reallocation

Lesson 5: Other Position Actions

Lesson 6: Useful Displays

Course Review

Slide 81

Notes:

Lesson 6 Objectives

After completing this lesson, you should be able to:

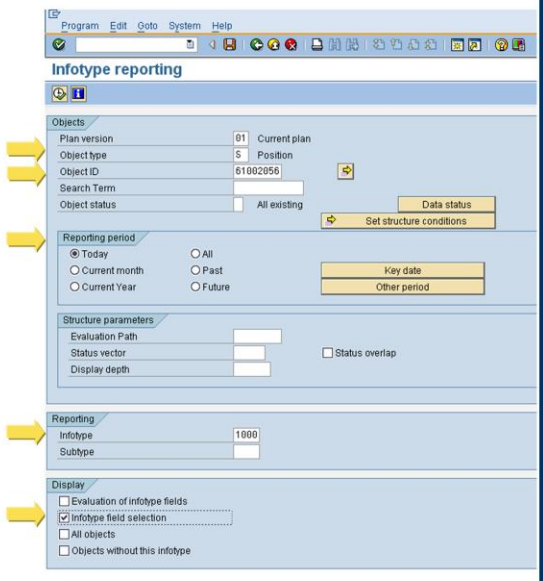
- Display status information for a position action (Workflow item) using the Infotype Reporting transaction, S_AHR_61016532
- View Job Family, Job Branch, and Job infotypes using the Display Infotypes transaction, RE_RHDESC10

Slide 82

Notes:

Infotype Reporting Transaction Summary

- Transaction code S_AHR_61016532
- After Workflow has been initiated, this transaction can be used to determine:
  - How many position actions have been performed?
  - What action was performed?
  - What PCR number was generated by SAP?
  - What the status is of the Workflow item?



Slide 83

Notes:

Workflow statuses

- N for in process
- R for rejected
- C for canceled
- A for approved
- D for created
- M for completed

Slide 84

Notes:

As you work in the ZOMA069 transaction and save your entries for a tab, the Workflow status is set to “D” for created.

Once you initiate Workflow, the status is updated to “N” for in process.

Once an approver approves the action, the status is set to “A” for approved and will remain at “A” for all approval levels unless an approver rejects an action.

When an approver rejects an action the status is changed to “R” for rejected.

Once the BEST Shared Services processes the approved action, the status is changed to “M” for completed.

If the initiator accepts the rejection of an action, he or she will change the Workflow status to “C” for canceled. When BEST Shared Services processes the canceled action the status will be changed to “M” for completed.

6:1 - Instructor Demonstration

Display Status and Other Useful Information for a Position

- In this demonstration, the instructor will demonstrate how to find status information on a position action using the following BBP:
- **S_AHR_61016532 Infotype Reporting**

Slide 85

Notes:

In a moment, the instructor will demonstrate how to use the Infotype Reporting transaction to find status information on a position action.

6:2 - Exercise

Display Status and Other Useful Information for a Position

- You want to view the Workflow status for a position previously created.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.

Slide 86

Notes:

In this exercise, you want to determine the Workflow status for a position previously created.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

Notes:

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.

Job Family, Job Branch, and Job Relationship (con't)

- Job Family = Tree
- Job Branch = Tree branch
- Jobs = Leaves on a branch

Slide 88

Notes:

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.

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.

Job Families

	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

Slide 89

Notes:

This slide shows the Job Families defined by the Office of State Personnel.

List of Job Family Infotypes

Infotype	Number
Object	1000
Relationships	1001
Description	1002
Job Family	5070

Slide 90

Notes:

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

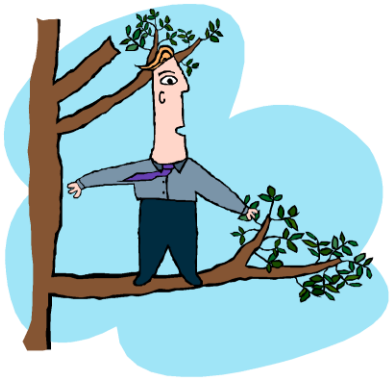
Discuss with the instructor any questions you have about OM infotypes.

Notes:

This slide shows the Job Branches for the Administration and Management Job Family defined by the Office of State Personnel.

List of Job Branch Infotypes

Infotype	Number
Object	1000
Relationships	1001



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Notes:

Take a moment to review the *OM Infotypes* reference. 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 slide are required for a position to exist in SAP.

Jobs Under the Legal Job Branch

- AGENCY LEGAL SPECIALIST TRAINEE
- AGENCY LEGAL SPECIALIST I
- AGENCY LEGAL SPECIALIST II
- AGENCY LEGAL SPECIALIST III
- ATTORNEY I
- ATTORNEY II
- ATTORNEY III
- ATTORNEY IV
- PARALEGAL TRAINEE
- **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 TRAINEE
- 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 II
- AGENCY GENERAL COUNSEL I
- INFORMATION PROTECTION CONSULTANT
- ATTORNEY III

Slide 93

Notes:

These are the Jobs for the Legal Job branch of the Administration and Management Job family.

List of Job Infotypes

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

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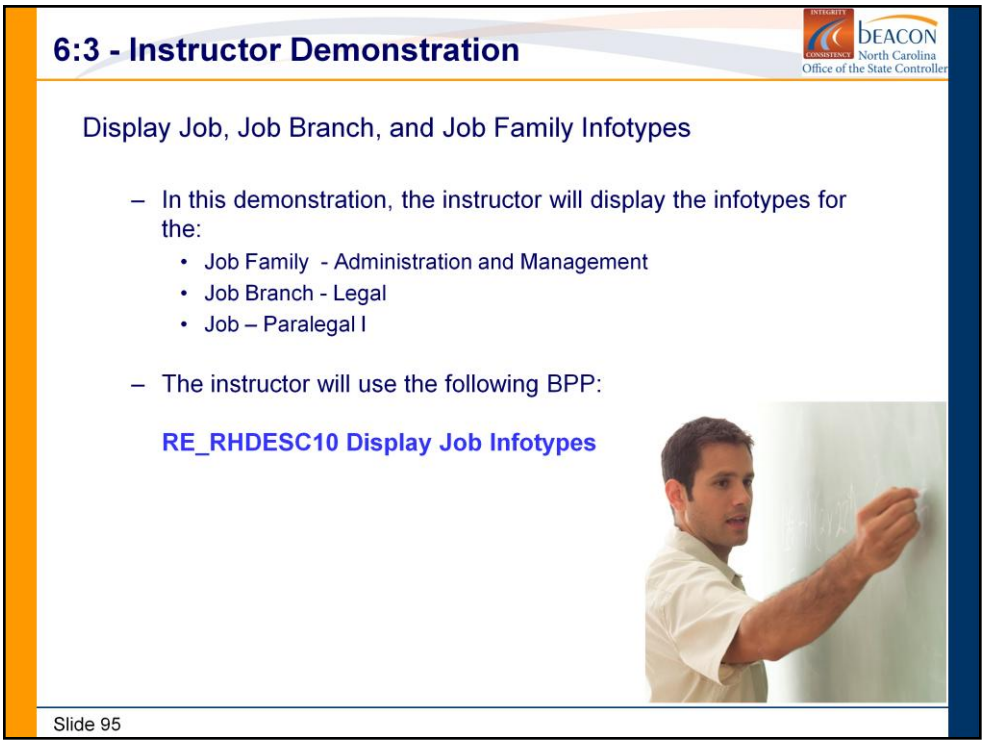
Notes:

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

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



Notes:

In a moment the instructor will access a BPP and demonstrate how to view Job infotypes.

As the instructor progresses through each infotype (screen), observe the field names and definitions on the individual tabs so that you can become familiar with the various types of information stored on the screen. For more information, the *OM Infotypes* reference is available on the BEACON University website.

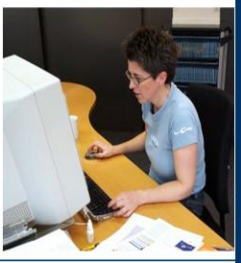
6:4 - Exercise

Display Job, Job Branch, and Job Family Infotypes

- You want to view the Job infotypes, Job branch and Job family associated with the Paralegal Job.

Instruction

- Refer to the Exercise Guide for the scenario and instructions to complete the exercise.



Slide 96

Notes:

In this exercise, you will display a Job Family, the Job Branch, and the Job associated with the Paralegal Job.

Use the information and data provided in the Exercise Guide to complete the exercise.

Also use eAssistant (BPP) for step-by-step instructions.

Lesson Review

In this lesson, you learned to:

- Display status information for a position action (Workflow item) using the Infotype Reporting transaction, S_AHR_61016532.
- View Job Family, Job Branch, and Job infotypes using the Display Infotypes transaction, RE_RHDESC10.

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Notes:

Course Map

BEACON North Carolina Office of the State Controller

- Lesson 1: OM Position Concepts
- Lesson 2: Position Creation
- Lesson 3: Display Position Data Using Infotype Reporting
- Lesson 4: Position Reallocation
- Lesson 5: Other Position Actions
- Lesson 6: Useful Displays
- **Course Review**

Slide 98

Notes:

Course Objectives

In this course you learned to:

- Perform position actions using the Position Actions transaction, ZOMA069
- Perform position actions using the Maintain Position transaction, PO13
- Display position data in planned status using the Display Infotypes transaction, RE_RHDESC10
- Search for the status of a position action using the Infotype Reporting transaction, S_AHR_61016532
- Display Job Families, Job Branches, and Job data using Display Infotypes transaction, RE_RHDESC10

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Notes:

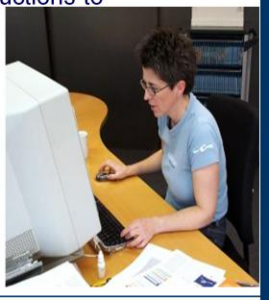
CR:1 - Course Review

Create a Full-time Graded Position

- The Western office of the History Department of Cultural Resources (CR CDS A&H HIS RES WESTERN OFFICE) has requested more building and environmental technicians. They want to create a new position called Building & Environmental Technician.

Instruction

– Refer to the Exercise Guide for the scenario and instructions to complete the exercise.

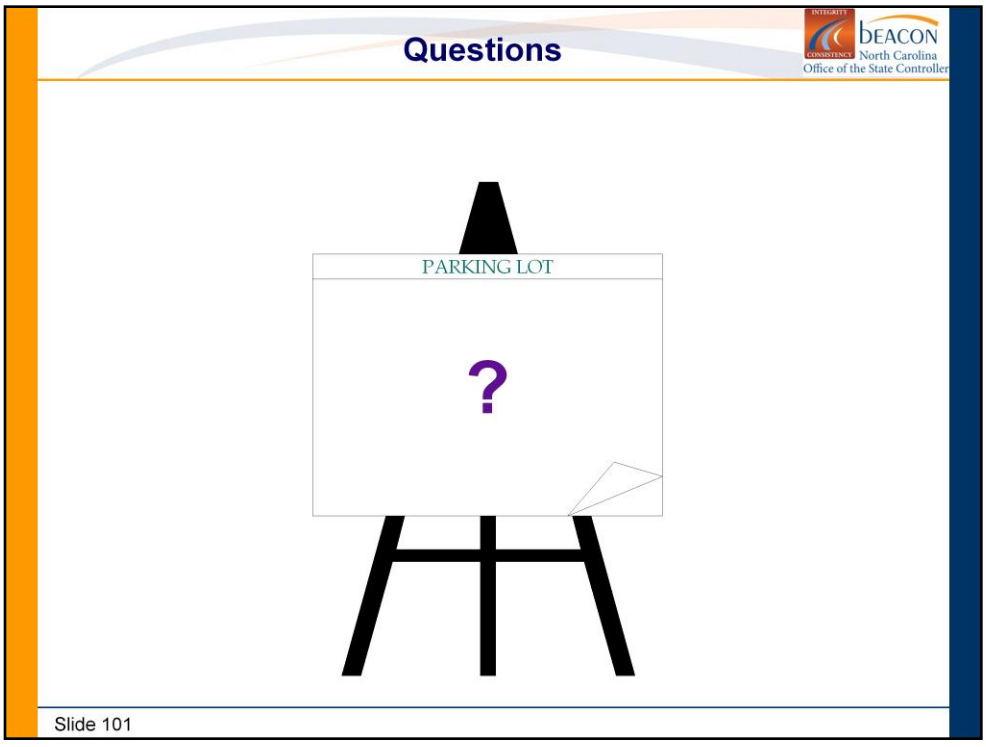


Slide 100

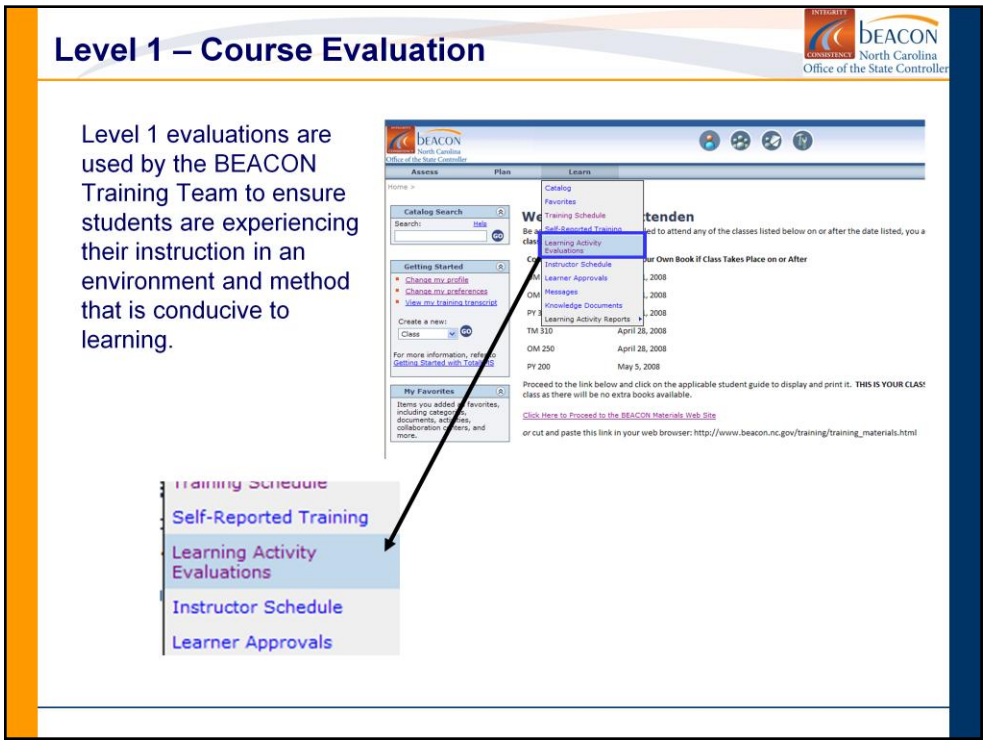
Notes:

Use the information and data provided in the Exercise Guide to complete the exercise.

Use eAssistant (BPP) for step-by-step instructions.


Questions
BEACON
North Carolina
Office of the State Controller
PARKING LOT
?
Slide 101

Notes:



Notes:

Level 1 Evaluations

The Level 1 class evaluation is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

Next Steps

BEACON North Carolina Office of the State Controller

Monitor BEACON communication

- BEST Shared Services web site (especially the Updates tab)
  - URL: http://www.ncosc.net/BEST/
- BEACON Training website: **What's New link**
  - URL: http://www.beacon.nc.gov/training/whats_new.html

Review conceptual materials

Access BEACON Help

- Access from an SAP transaction
  - URL: http://help.mybeacon.nc.gov/beaconhelp

Practice what you've learned

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

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Notes:

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

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

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

Need transactional assistance?

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

BEACON
North Carolina
Office of the State Controller
CONGRATULATIONS
You have completed the course
Please complete your course evaluation!

Notes:

Demonstration and Exercise Summary

Transaction	Description	Type	Page #
NA	2:1 - Log on to SAP	NA	30
ZOMA069	2:2 - Create a New Full-time Graded Position	D	31
	2:3 - Create a New Full-time Graded Position	E	32
ZOMA069	2:4 - Display a Position	D	33
	2:5 - Display a Position	E	34
ZOMA069	2:6 - Create a New Part-time Graded Position	E	36
ZOMA069	2:7 - Change a Position before Initiating Workflow	D	38
	2:8 - Change a Position before Initiating Workflow	E	39
ZOMA069	2:9 - Create a New Part-time Banded Position	D	41
	2:10 - Create a New Part-time Banded Position	E	42
RE_RHDESC10	3:1 - Display Position Infotypes (Single Selection)	D	54
	3:2 - Display Position Infotypes (Single Selection)	E	55
RE_RHDESC10	3:3 - Display Position Infotypes (Multiple Selection)	D	58
	3:4 - Display Position Infotypes (Multiple Selection)	E	59

D = Demonstration
E = Exercise

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Notes:

NOTE: These class job aids were discussed:

- *Position Actions*
- *OM Infotypes*
- *OM Fields Glossary*

Demonstration and Exercise Summary

Transaction	Description	Type	Page #
ZOMA069	4:1 - Reallocate a Position Up	D	65
	4:2 - Reallocate a Position Up	E	66
ZOMA069	4:3 - Knowledge Check - Reallocate a Position Down	E	67
ZOMA069	5:1 - Transfer a Position	D	72
	5:2 - Transfer a Position	E	73
ZOMA069	5:3 - Change the Employee Group and Employee Subgroup Assigned to a Position	D	74
	5:4 - Change the Employee Group and Employee Subgroup Assigned to a Position	E	75
ZOMA069	5:5 - Change the County Assignment for a Position	E	79
PO13	5:6 - Change the Title of a Position	E	80

D = Demonstration
E = Exercise

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Notes:

NOTE: These class job aids were discussed:

- *Position Actions*
- *OM Infotypes*
- *OM Fields Glossary*

Demonstration and Exercise Summary

Transaction	Description	Type	Page #
S_AHR_61016532	6:1 - Display Status and Other Useful Information for a Position	D	87
	6:2 - Display Status and Other Useful Information for a Position	E	88
RE_RHDESC10	6:3 - Display Job, Job Branch, and Job Family Infotypes	D	97
	6:4 - Display Job, Job Branch, and Job Family Infotypes	E	98
ZOMA069	CR:1 - Course Review: Create a New Banded Position	E	102

D = Demonstration
E = Exercise

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Notes:

NOTE: These class job aids were discussed:

- *Position Actions*
- *OM Infotypes*
- *OM Fields Glossary*

Knowledge Check

T	F	Question
T		1. The ZOMA069 transaction is for the positions actions that were known as PD118s in PMIS.
T		2. All OM actions entered in the ZOMA069 transaction must be initiated in Workflow.
	F	3. Position names and addresses should be entered in SAP in upper case type.
T		4. Position information determines how overtime, holiday, and premium pay is calculated and paid out.
T		5. When creating a position, the validity date must be equal to, or prior to the date the employee is assigned to the position.

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Notes:

Knowledge Check – Lesson 3

Which infotype. . .	Answer (Infotype)
1. Stores the salary and pay scale structure?	Planned Compensation (IT1005)
2. Defines the relationships between different OM objects?	Relationships (IT1001)
3. Defines the work schedule for the position?	Full Time Equivalent (IT1011)
4. Stores the company code, personnel area, and personnel subarea for the position?	Acct. Assignment Features (IT1008)
5. Stores the SOC code for the job?	SOC Code (IT9022)
6. Captures information for critical position types?	Position Types (IT9023)
7. Stores the 15-digit position number from PMIS and the 8-digit SAP reference position number?	Reference Position Number (IT9021)
8. Stores position budget information?	Display Budget (IT9018)
9. Stores settings to calculate holiday compensation?	Holiday Premium Rate (IT9010)
10. Stores settings for positions that are eligible for On-Call compensation?	On-Call (IT9011)

Slide 109

Bonus question: Which SAP transaction that you learned in the Organizational Management Overview course also displays position information?

Notes:

Knowledge Check – Lesson 5
Which position action should you use?

	Event	Action
1.	In an organizational restructure, the Training Manager position now reports to the Director of Change Management, a new position.	Change Supervisor of Position (124)
2.	The Quality Technician position is being transferred from Forsyth county to Guilford county.	Position County Change (122)
3..	In an Organizational Restructure, the XYZ project is completed; therefore the XYZ Project Manager position is no longer needed.	Abolish Position (109)
4.	The number of hours per week of a part-time position is changing but the appointment type (Employee Group field) and the FSLA rules for the position are not affected.	Position Hours Change (115)
5.	Individual is moved from a Solution Delivery Consultant II to a Technical Delivery Specialists II within the same department. These positions are the same grade. The existing position is maintained by changing the job that describes the position.	Reallocate Position Horizontal (105)

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Notes:

Take a few minutes and choose the position action that should be performed for each business event. If needed, please refer to the *Position Action Descriptions* reference that is available through the BEACON University web site.