# OSC Training | PA210

*Developing Guardians of North Carolina's Data*

NORTH CAROLINA OFFICE OF THE STATE CONTROLLER

***Updated 8-8-19***

# North Carolina Office of the State Controller

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# INTRODUCTION

## Overview

Welcome to the Integrated HR-Payroll System Personnel Administration Terms, Concepts, and Display Data Virtual training course. The Personnel Administration (PA) module is used to enter and maintain employees in the Integrated HR-Payroll System.

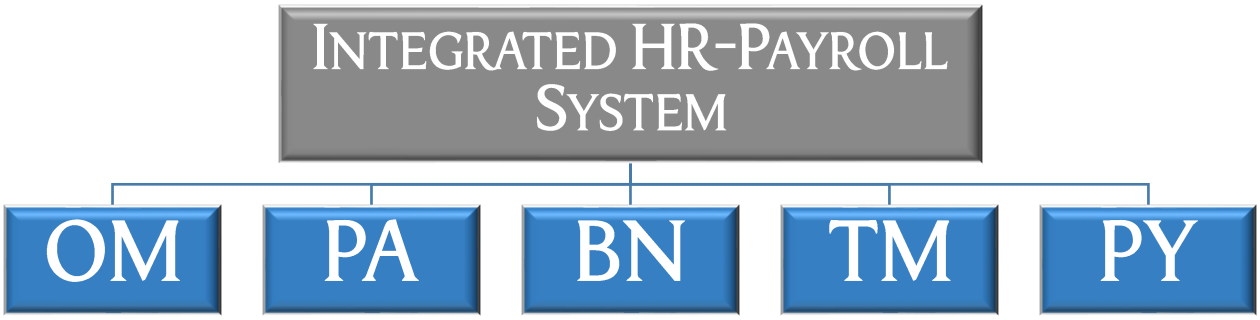
The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. There will be at least one break during this session.

This course can be taken either virtually or through an instructor-led class.

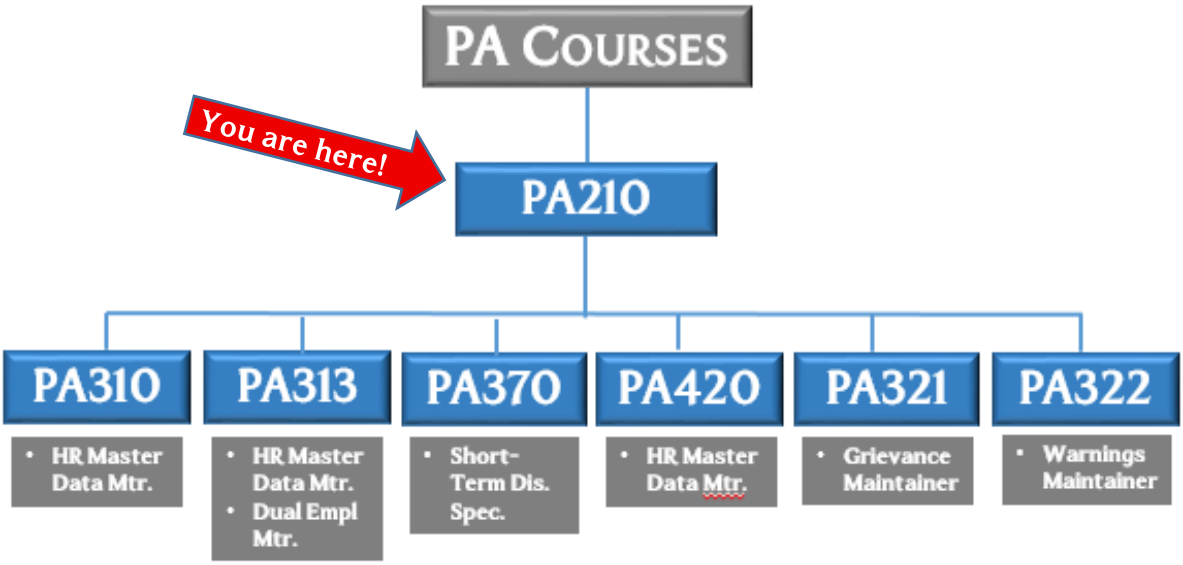
You may also find it useful to take the Employee Self Service and Manager Self Service courses, although they are not required for the PA curriculum. However, they are mandatory for other requirements.

## 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 *Personnel Administration* module.



# PA Curriculum by Security Role




Within the Personnel Administration module, there are several courses. Your position determines which courses you are required to attend.

# 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:

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

# Course Objectives

This course is designed to provide you with general knowledge about Personnel Administration and how to display data. Upon completion of this course, you should be able to:

- Define key terms and processes
- Display information on an employee's personnel record using the Integrated HR-Payroll System
- Distinguish between the display transaction codes

The PA Terms, Concepts, and Display Data Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the Integrated HR-Payroll System training environment.

# Reference Materials

- Student Guide
- Job Aids
- Other Resources
- OSHR Employee Grievance Policy
- Online help - from the SAP portal
- Work instructions - Business Process Procedures (BPPs)

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/state-agency-resources/training**

# SUMMARY

This course is intended to give HR professionals an understanding of the Integrated HR-Payroll System Personnel Administration module. This course will provide you with demonstration and practice for displaying the employees in the Integrated HR-Payroll System.

# LESSON 1: TERMS AND DEFINITIONS

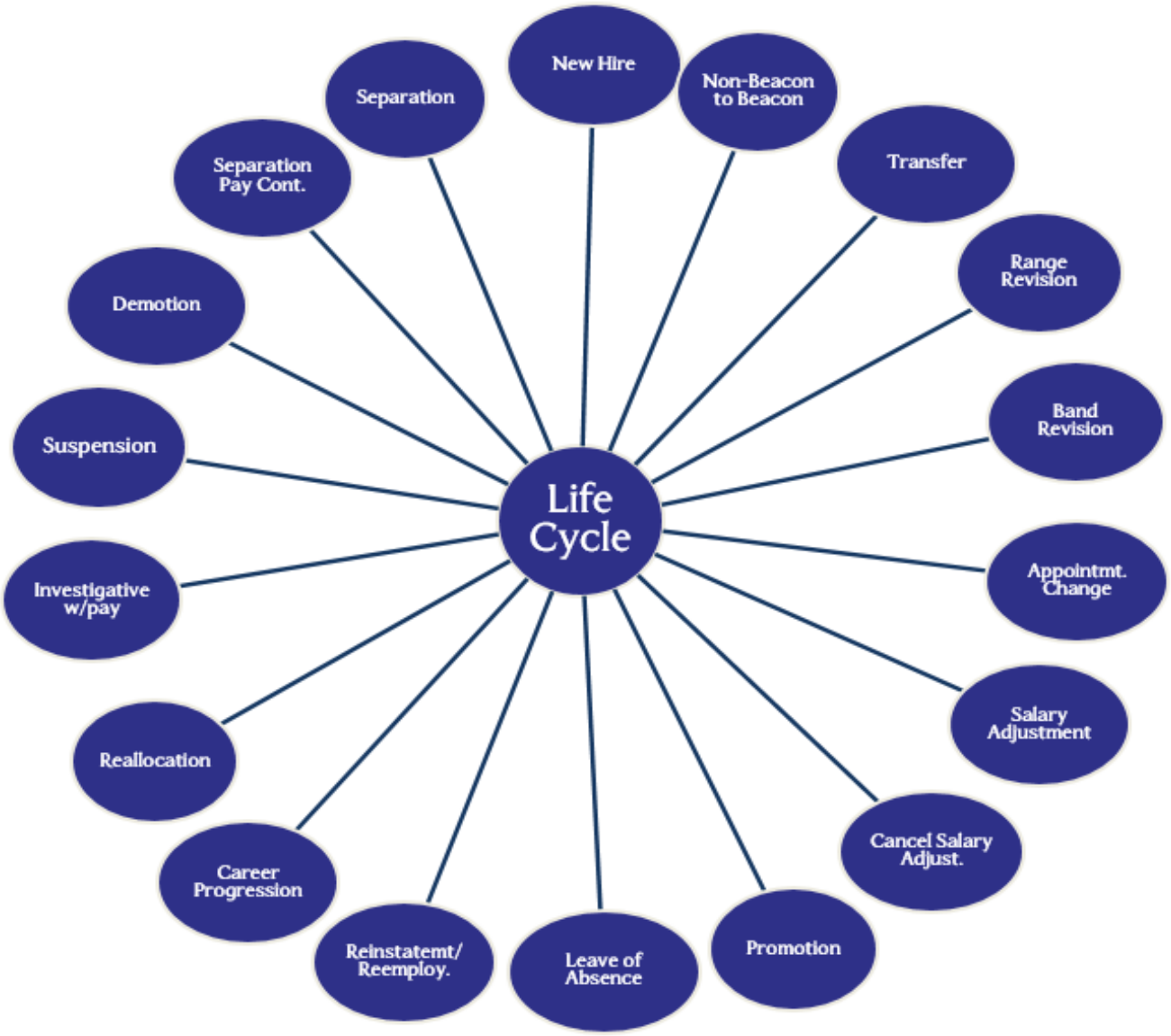
## Objectives

To communicate effectively, it is important that everyone has the same understanding of terms and concepts in the Integrated HR-Payroll System environment.

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

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

# Actions




The life cycle of an employee comprises many different events. The Integrated HR-Payroll System defines those events as a specific infotype called **Actions** (0000). Actions for the State of North Carolina are shown above.

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

Each Action has one or more **reasons** that are associated with the life cycle event. When an action is created in the Integrated HR-Payroll System, the appropriate reason must be selected for the employee's life cycle event.

**Quick Entry** is an action used to hire contractors, volunteers, board members, and federal employees who are to have access to the Integrated HR-Payroll System. This action can be performed by the BEST HR team only.

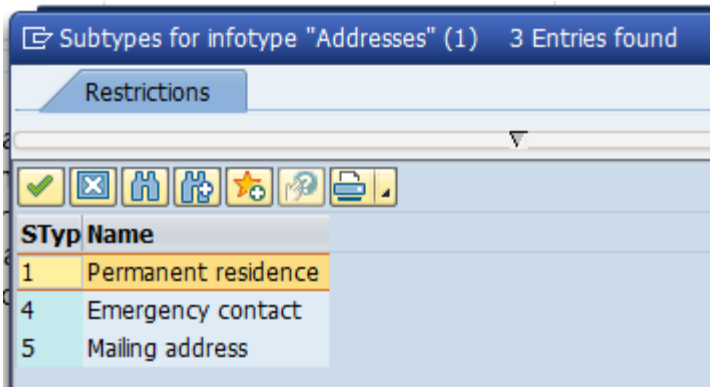
# Infotypes

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

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

# Subtypes

A **subtype** is an expansion of an infotype that holds additional screens of information. For example, the State of North Carolina records not only an employee's permanent address, but the mailing address and emergency contact information as well. Therefore, the Addresses infotype (IT0006), contains subtypes (1, 4, 5) for those additional addresses. Only a few infotypes require subtypes.




When updating an employee's address, remember to use LINE 1 only for both the street address and any additions (i.e., apt or suite). Leave line 2 blank. Only enter a mailing address if it is different from the Permanent address.

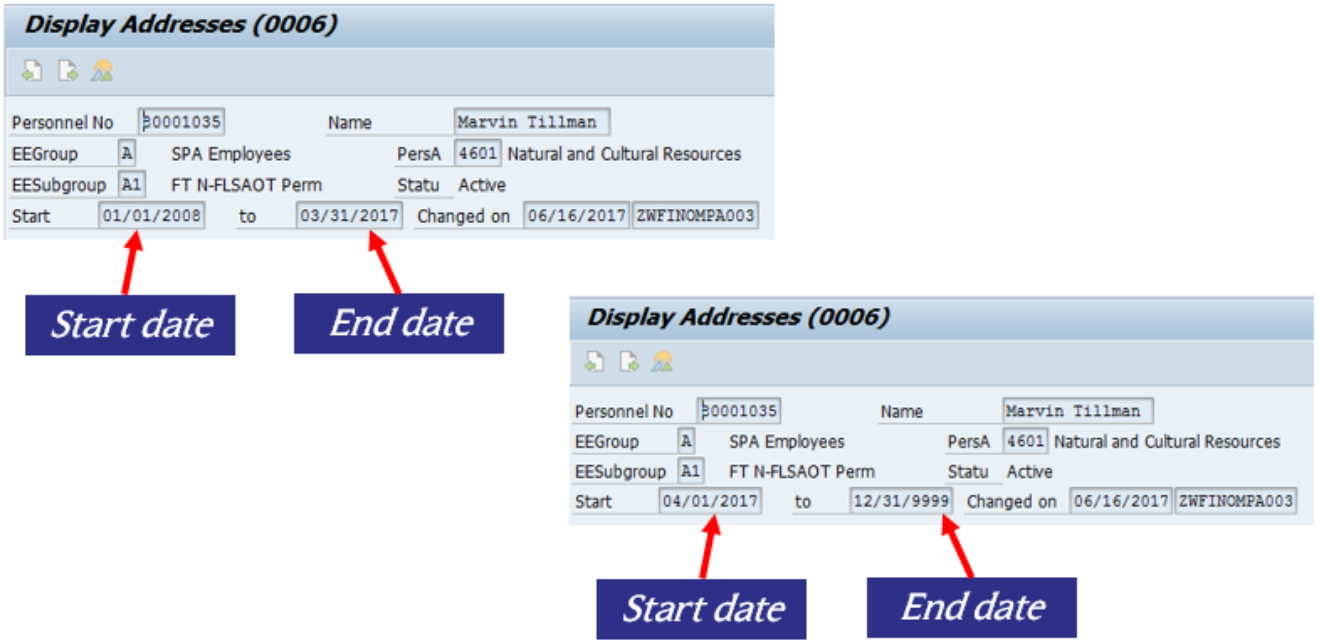
# Dates

## *Critical in the Integrated HR-Payroll System*

Every HR Action and infotype must have a beginning (effective) and ending date. When records are created or revised, you are required to enter an effective (beginning) date. The 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. An end date also can be manually entered by data entry personnel.

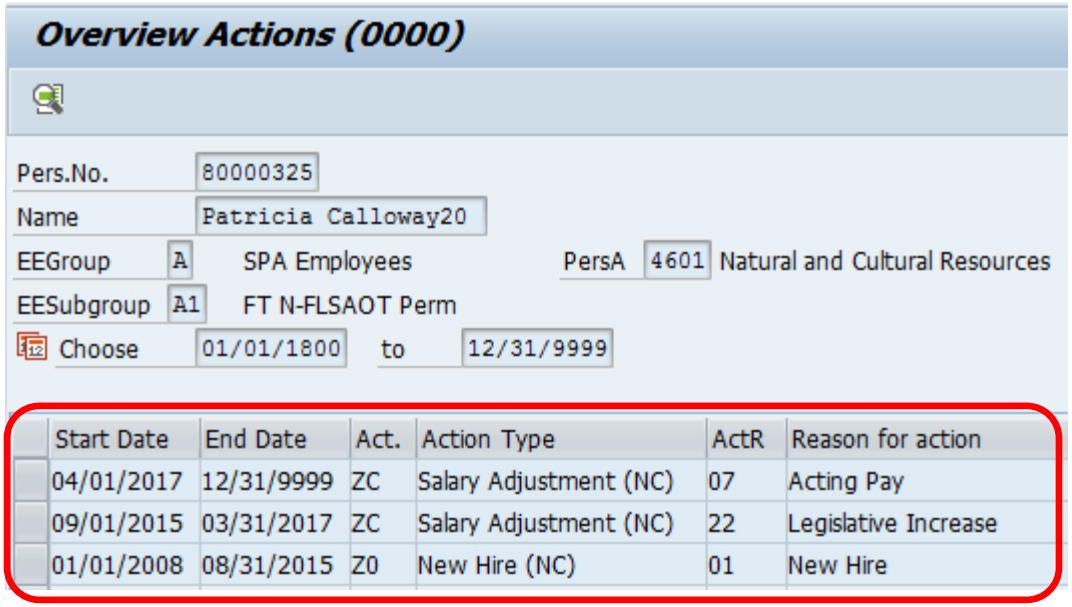
## *Validity Periods*




When a record is created, it must have a beginning or start date and an ending date, which is called the validity period. Although the data entry personnel will always know the start date of a record, he or she often will not know the end date. For example, if an employee is hired or promoted today, the end date for either of those records is unknown. To accommodate for that uncertainty, 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 an employee's Integrated HR-Payroll System personnel record is revised, the old record is not lost or overwritten (unless it is a correction entry), it just ceases to be the most current record. The old record remains in the system as part of the employee's history. Historical records will have actual start and end dates; the current record's end date is 12/31/9999. In case of a correction entry, the incorrect data is overwritten because you don't need a historical record of the incorrect data.

## *Delimit*




| Start Date | End Date | Act. | Action Type | ActR | Reason for action |
|---|---|---|---|---|---|
| 04/01/2017 | 12/31/9999 | ZC | Salary Adjustment (NC) | 07 | Acting Pay |
| 09/01/2015 | 03/31/2017 | ZC | Salary Adjustment (NC) | 22 | Legislative Increase |
| 01/01/2008 | 08/31/2015 | Z0 | New Hire (NC) | 01 | New Hire |

**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.

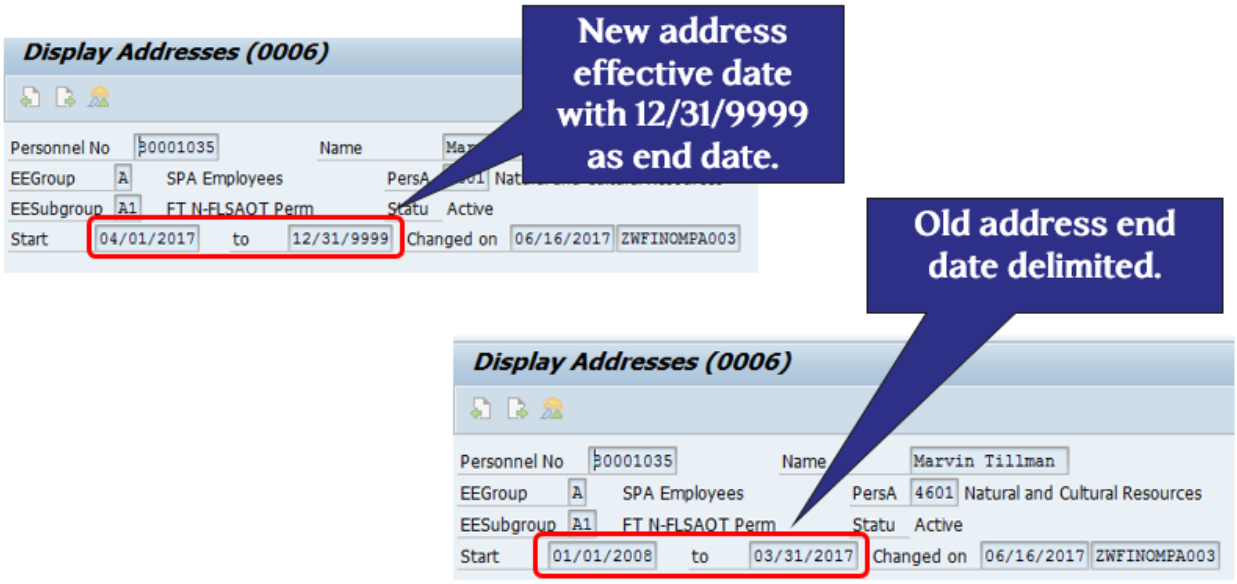
In the example illustrated above, the employee's original Action was the New Hire. When it was entered, it had an end date of 12/31/9999.

On 9/1/2015, a Salary Adjustment (Legislative Increase) was entered for the employee. When the effective date of 9/1/2015 was entered, the system automatically delimited the New Hire record to 8/31/2015 and applied 12/31/9999 to the Salary Adjustment (Legislative Increase).

In a similar manner, when another Salary Adjustment (Acting Pay) was entered 4/1/2017, the Integrated HR-Payroll System delimited the Salary Adjustment (Legislative Increase) one day prior and made the Salary Adjustment (Acting Pay) the most current record.

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.

## *Infotypes Delimited*



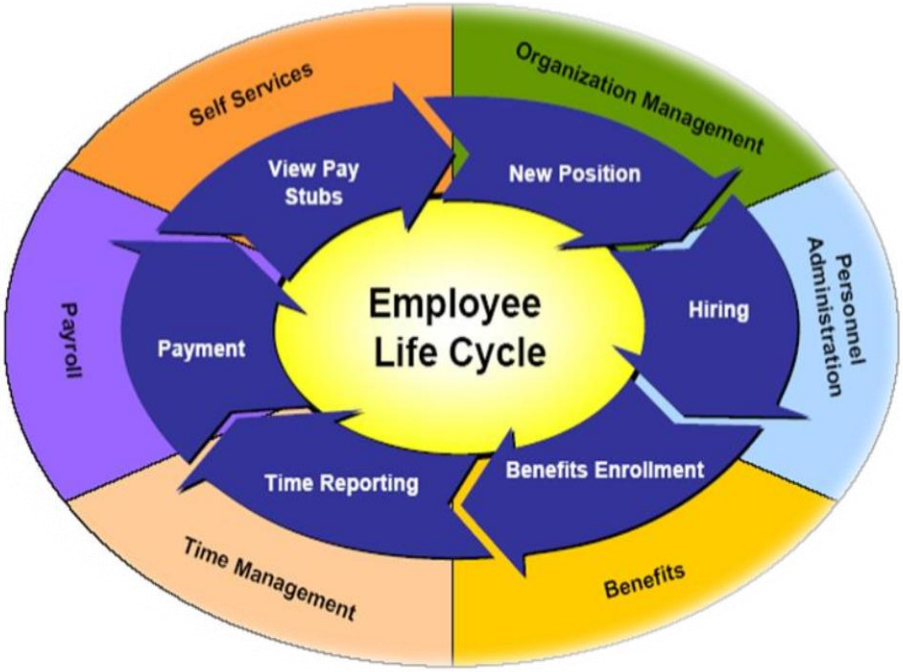

The preceding example was for the Actions (New Hire, Salary Adjustment) infotype. However, the same concept is true for individual infotypes as well.

In the above example, the employee moved to a new permanent address effective 8/10/2016. When the new permanent address was entered with the 04/01/2017 effective date, the Integrated HR-Payroll System automatically assigned the end date as 12/31/9999 and delimited the old permanent address as of 03/31/2017.

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

🗁 **NOTE**: The Integrated HR-Payroll System allows an employee to have more than one emergency contact. Because of this, Emergency addresses must be delimited manually (the system does not automatically delimit the former emergency contact record).

# Integrated HR-Payroll System Integration

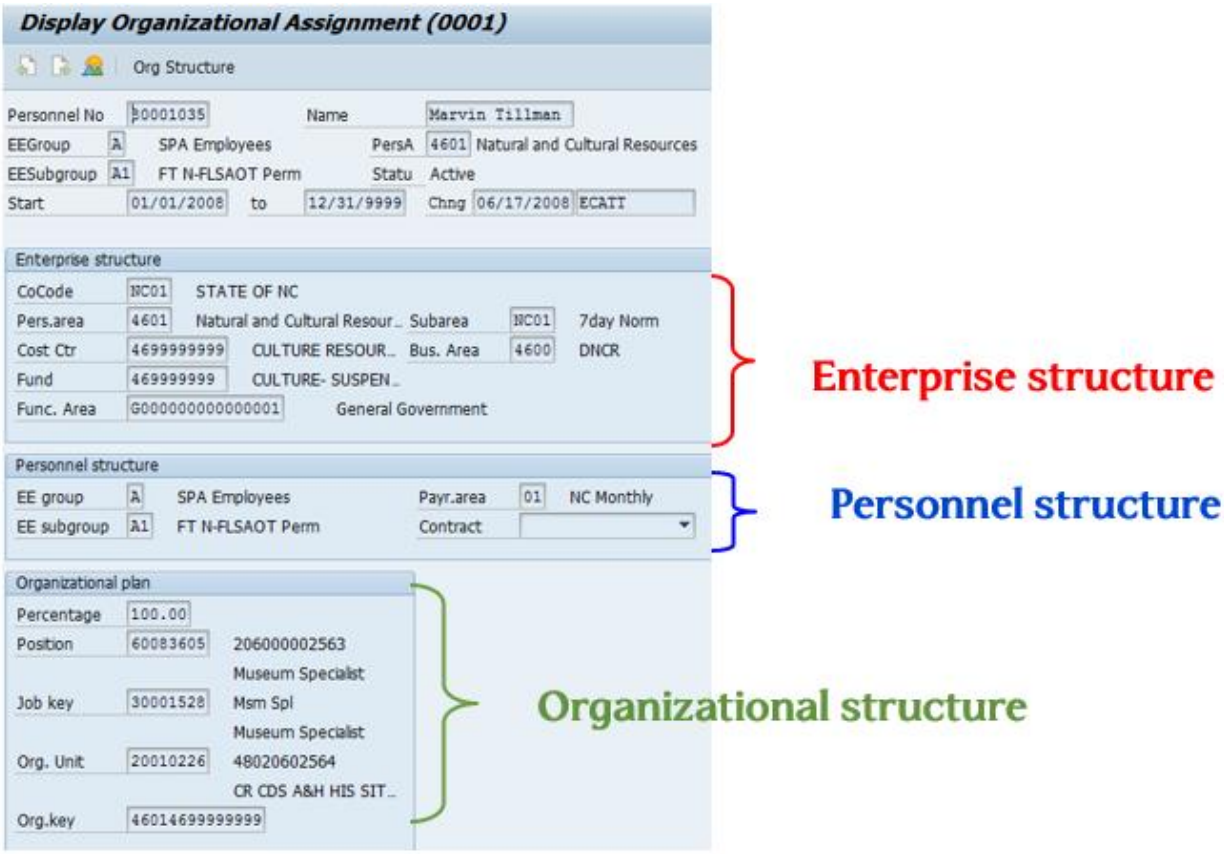



Because the Integrated HR-Payroll System is an integrated system, many entries made in Personnel Administration affect some component of an employee's time, benefits and pay.

## ***KNOWLEDGE CHECK 1.1***

| QUESTION | TRUE | FALSE |
|---|---|---|
| 1. A record with an ending date of 12/31/9999 has been delimited | | |
| 2. Emergency contact addresses must be manually delimited. | | |
| 3. Historical records do not have actual start and end dates. | | |

# System Organization of HR Information



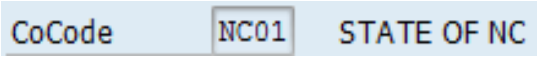

The Integrated HR-Payroll System uses the following areas to organize organizational and employee information:

- Enterprise Structure
- Personnel Areas
- Organizational Structure
- Enterprise Structure

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

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

## *Company Code*




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

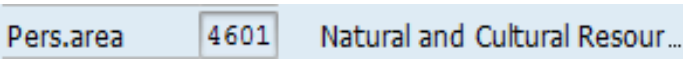
- *NC01 – State of North Carolina - NCAS*

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

- *NC02 – State of North Carolina - DOT/Commerce DES and DWS*

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.

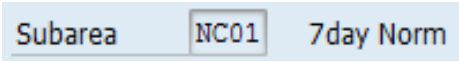
## *Personnel Area*




The Personnel Area is tied directly to the company code and is used by Payroll to identify the specific agency where the employee works. A company code can include one or more Personnel Areas. The 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 Commerce DES and DWS

## *Personnel Sub-Area*



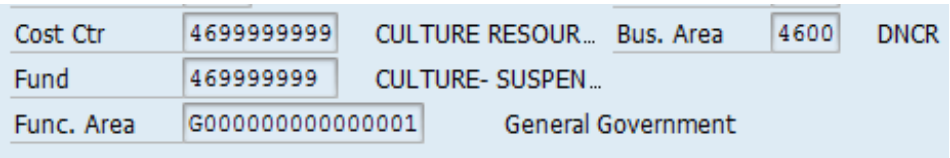

The Personnel Subarea further defines the Personnel Area. The Personnel Subarea is identified by a four digit alpha-numeric code and has been designed to identify various working schedules so that Time Management can define groups of specific time entry rules (for example, 7-day schedule; 24/7 etc.). 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)

See the Personnel Area Subarea Job Aid for detailed information concerning the relevant PSAs associated with each Personnel Area.

| | |
|---|---|
| INFORMATION | *Follow your instructor as he/she takes you to the Training HELP page to view the Personnel Area Subarea Job Aid.* |

## *Miscellaneous Fields*




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.

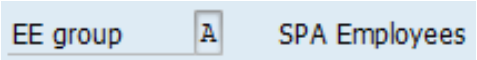
🗁 **NOTE**: The exception is HHS (403-b).

# Personnel Structure

The Personnel structure is comprised of:

- Employee Group
- Employee Subgroup
- Payroll Area

## *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:

- **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*

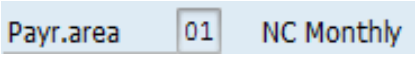
The EE Subgroup defines whether the employee is subject or not to the Fair Labor Standards Act (FLSA) overtime, and full-time/part-time status. It is also used to determine other types of Personnel Calculation Rules specific to the combination of groups and sub-groups. The employee subgroup for the Personnel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

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

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 continue to see why accuracy is so critical when data is entered.

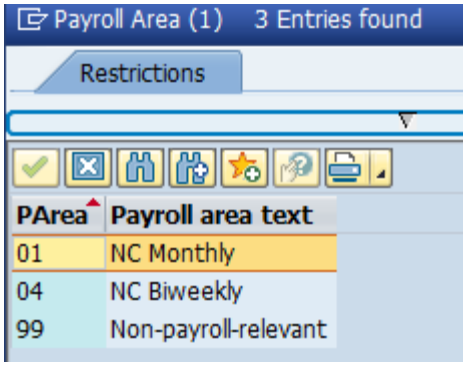
| Additional Resources |
| --- |
| Refer to the OSC Training website in HELP documents for more information about Employee Groups and Subgroups.<br>Search for the following job aid:<br>• *Employee Groups and Subgroups* |

## *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.

- Describes the pay frequency and payroll cycle for each employee
- Defaults based on personnel area, personnel subarea, employee group, and employee subgroup
- Examples – Monthly, Biweekly
- Used as a selection to execute the Integrated HR-Payroll System payroll.
- Determines pay period, start date, end date, pay date and payroll frequency.



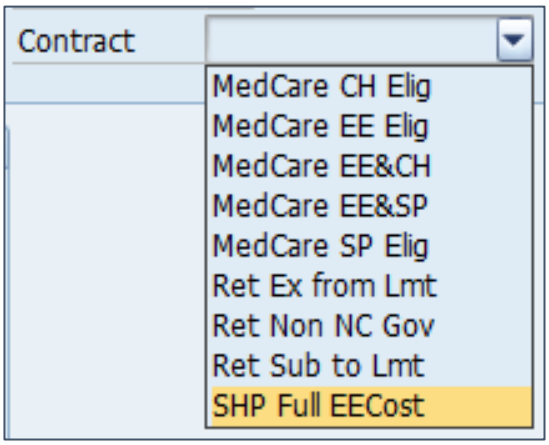

Each employee is assigned a payroll area.

Payroll accounting is performed for each payroll area.

The 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.

🗁 **NOTE**: All temporary positions are in the biweekly cycle!

### *Contract*




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

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

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

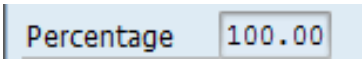
Retiree rehire earning limitations are used to report to ORBIT employees who are subject to earning limitations.

# Organizational Structure

The organizational plan identifies the:

- Percentage
- Position
- Job
- Org Unit
- Org key

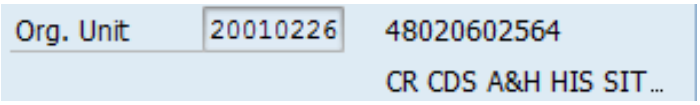
## *Percentage*




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

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

## *Organizational Unit*




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

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

An entity within the organization

*Example:*

--> Dept. of Natural and Cultural Resources (*Agency/Department*)

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

--> Historical Resources (*Section*)

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

# EE HR Overview (ZEMP)

```
                                        As Of: 09/18/2017          Run Date: 09/18/2017

Employee Data                                                  Position Data
 PERNR:              80001035                                    Position:          60083605 - Museum Specialist
 EE Name:            Marvin  Tillman                             Job:               30001528 - Museum Specialist
 Employment St:      Active                                      Supervisor:        80001036 - Jean  Leach
 Personnel Area:     Natural and Cultural Resources              Org Unit:          20010226 - CR CDS A&H HIS SITES OR St Cap
 EE Group:           SPA Employees                               EE Group:          SPA Employees
 EE Subgroup:        FT N-FLSAOT Perm                            EE Subgroup:       FT N-FLSAOT Perm
 Personnel Subarea:  7day Norm                                   Personnel Subarea: 7day Norm
 Ann Sal/Hr Rate:    $31,705.00                                  Budgeted Salary:   $33,667.00
 EE Exempt Status:   No                                          Statutory Exemption Type: No
 PS Group:           GR66        Level:    GR
 Cap.util.lvl:       100.00      WkHrs/Pd: 173.33 Monthly   Organizational Data
 DOB:                07/31/1965  Gender:   M                  Agency:                      -
 Ethnic Origin:      American Indian or Alaskan Native (N-H/L)Division:                   -
 Disability:         None/Prefer not to report                Section:                     -
 Military Status:    N/A
 Veteran Status:
 State EOD:          01/01/2008    Agency EOD:01/01/2008    Time Data
 Length of Service:  000 Mths                                 Time Management St:   1 - Positive Time Recording
 Est Long Due Date:  08/2027                                  Working Week:         07 - Wk - Sun (mdnt) - Sat
                                                              Work Schedule Rule:   D01N08GN - MTWHF-8,SaS-O
Latest EE Action & Salary Changes:                            Weekly Working Hours: 40.00
 Most Recent Actn:   New Hire (NC)                            OT Comp:        Y   365              NS Premium:      N
 Reason:             New Hire                                 Callback:       N                    WE Premium:      N
 Action Date:        01/01/2008                               Gap Hrs Comp:   N                    ES Premium:      N
 Amt Last Sal Chg:   $0.00                                    Holiday Payout: Y   365              Holiday Premium: Y 50%
 Salary Chg Date:    01/01/2008                               On-Call:        N
                                                              Extended Duty:  N

 Disclaimer: Not for Public Information
```

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

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

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

# ***KNOWLEDGE CHECK 1.2***

| QUESTION | ANSWER |
|---|---|
| 1. True or False: The elements that determine an employee's Personnel Subarea assignment involve time and leave accrual rules. | |
| 2. True or False: The Company Code is the highest level of the organizational structure. | |
| 3. Enter one of the two agencies that belong to Company Code NC02. | |
| 4. True or False: An Employee Subgroup such as: FT N-FLSAOT TL indicates that the employee is a permanent employee who will receive overtime pay. | |
| 5. True or False: The Employee Group defines specific processing for payroll calculation rules, for example, is the employee subject or not subject to FLSA. | |
| 6. Information entered into Personnel Administration does not affect an employee's time, benefits, and pay. | |

# Job versus Position

| JOB | 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 |
| • Is the basis for creating positions | • May be classified as Chief position |
| | • Is activated by BEST Shared Services |

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

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

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

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

**Job** = Office Assistant

**Positions**:

- Human Resources Assistant
- Accounting Assistant
- Inventory Assistant

*Example:*

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

| OFFICIAL JOB (CLASS) TITLE | POSITION (WORKING) TITLE |
|---|---|
| Engineer | Water Quality Engineer<br>Air Quality Engineer<br>Building Systems Engineer<br>County Maintenance Engineer<br>Elevator Engineer<br>Environmental Engineer |
| Networking Specialist | Network Tech<br>WAN Specialist<br>IT Manager |

## *Position (S)*

A Position:

- Belongs to an org unit (O)
- Is described by a job (C)
- Can represent 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 1 or more persons (P)
- Number can begin with 60 or 65
- 60 - transferred in at Go-Live
- 65 - created since Go-Live

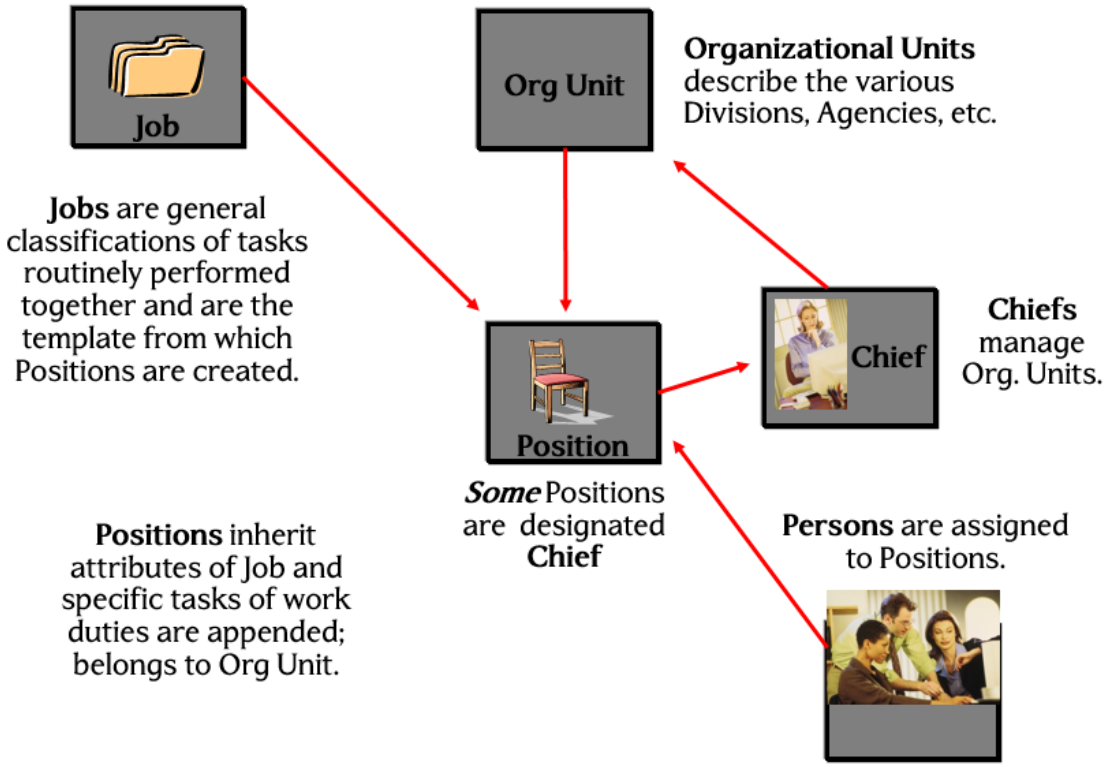
**The SAP code for a Position is "S."**

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

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

A position is described by a job and held by one or more **persons**. In the Integrated HR-Payroll System terms, a person is a holder of a position and is not a holder of a job. When a person is hired using the PA modules, he or she is assigned to a position that resides in an organizational unit. It is important to remember that an employee's personnel record contains the position name and number, org unit name and number, and job name and number as well as the person's name and personnel number.

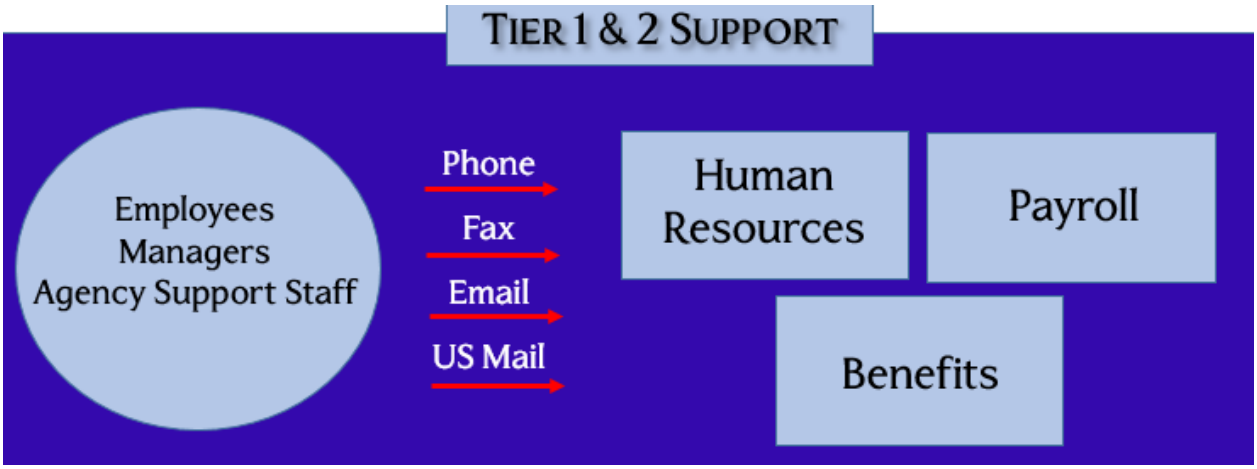
Some positions are classified as Chief positions. Any position that manages employees and/or an organizational unit is designated a Chief position. When you think of a traditional organizational chart, you know that managers usually report to an upper level manager, and the division, agency or department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




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

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

# BEST Shared Services




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

- A team of support specialists with access to common knowledge content and management tools.
- A single point of contact for all initial questions.
- Available to employees, managers, business partners, and Agency support staff.
- Able to provide immediate answers or route calls to appropriate expert or support group.
- Able to establish alerts for known issues.
- Available via phone, fax, email, or US mail:

  1-866-NCBEST4U (1-866-622-3784)

  919-707-0707 - in Raleigh

  BEST@osc.nc.gov

  Fax: 919-855-6861
- Hours of operation:

  8:00 am to 5:00 pm

# KNOWLEDGE CHECK 1.3

| QUESTION | ANSWER |
|---|---|
| 1. Enter the percent value that should always display in the Percentage field on the Organizational Assignment infotype, even if the employee is part-time. | |
| 2. True or False: In the Integrated HR-Payroll System, position numbers are not assigned sequentially; therefore, the numbers identify certain parameters such as the Agency, etc. | |
| 3. A person holds a ___. | |
| 4. True or False: A position inherits the classification of duties and attributes from the job. | |

## SUMMARY

In this lesson, you learned to:

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

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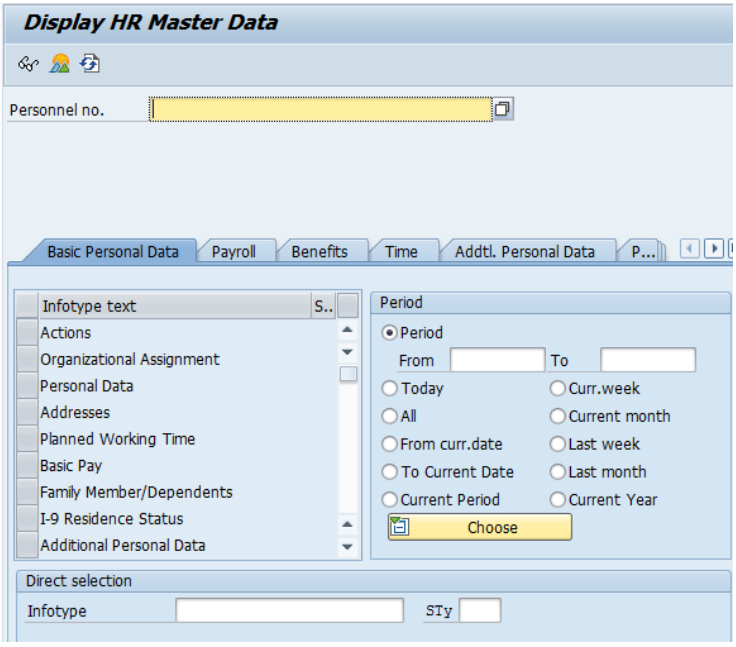
# LESSON 2: DISPLAY EMPLOYEE DATA

## Objectives

- Differentiate between the two display transactions
- Locate employees in the Integrated HR-Payroll System
- Display an Action and associated reason for the Action
- Display an individual infotype

## Transaction Codes

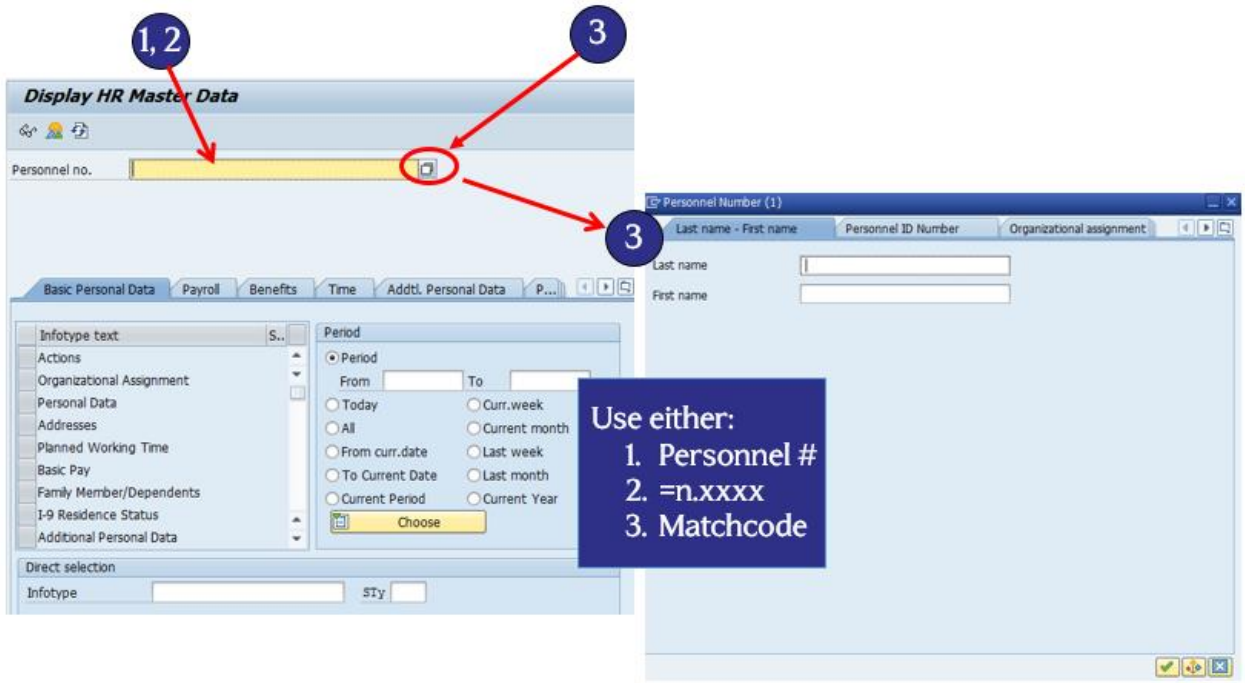



To display personnel information, you will use either transaction code **PA10** or **PA20**. Except for BEST Shared Services, you will see only the employees within your own division or agency. In a similar manner, you will see only those infotypes for which you have the security access. For example,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

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

**PA20** is used to display individual infotypes. Using PA20 saves time when you need to look at only one or two pieces of information in a personnel file. For example, if you only need to view the employee's salary, you can go directly to the Basic Pay infotype (IT0008). However, if you used PA10, you would have to page forward until you reached that infotype.

# Finding an Employee




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

1. ***Personnel Number***: Enter the Personnel Number into the Personnel no. field.
2. ***Shortcut***:

   **A**. Use a shortcut **(=n.xxxx)** in the Personnel No. field to search by last name.

   (**Example:** =n.hendrix - NO spaces.)

   A list of all employees with that last name displays. Double-click to select the appropriate employee.

   You can search for an employee by using either their full name or partial name. Here are more search examples:

   =n.last name, first name (Example: =n.Jones,Mary)

   =n.last name, first initial (Example: =n.Jones,M)

   =n.first letter of last name* (Example: =n.Jon*)

**B**. Use a shortcut **(=c..####)** in the Personnel No. field to search by SSN.

(**Example:** =c..123456789 - NO spaces.)

3. ***Matchcode:*** Use the Matchcode at the end of the Personnel No. field to search by last and first name, or by Personnel Number, or by org assignment.

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

# Viewing Icons

Use any of the applicable functions to view employee records:

**Display** 

**Overview** 

**Next Record** 

**Previous Record** 

**Choose (drill down)** 

**Refresh** 

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

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

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## EXERCISE 2.1: Logging on to the Integrated HR-Payroll System

**SCENARIO**

Use the following steps to log on to the Integrated HR-Payroll System.

**Instructions**

Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

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 **PA10** in the text box.
11. Click the green check mark to close the box and add the transaction to your Favorites list.
12. Repeat steps 8-11 to add the **PA20** transaction to your Favorites list.
13. Stop when you have added the two transactions.

You must enable your technical settings to be able to display the transaction codes on your screen.

14. Select **Extras > Settings** from the menu at the top of the screen to display the settings dialog box.
15. Click the **Display technical names** checkbox.
16. Click the **Continue (Enter)** button. The transaction codes will now display in the menu tree.

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

17. Copy the web address as indicated by your instructor for the OSC Training HELP page.
18. Right-click on **Favorites**.
19. Select **Add other objects** from the list. A drop-down list is displayed.
20. Click **Web address or file** from the list. A pop-up box dialog displays.
21. Enter a title for your web page in the **Text** field.
22. Paste the web address you copied in step 17 for the OSC Training HELP page in the **Web Address or File field**.

23. Click the **Continue** button at the bottom right-hand corner of the box.
24. The URL has been added to the SAP Favorites folder. Click the **URL** to access the website you just added.

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## EXERCISE 2.2: Displaying an Employee's Personnel Record

**SCENARIO: Instructor Only**

Use both the menu path and the Favorites link to access PA10. Search for an employee (Maureen Ahmed) using the matchcode function. Explore an employee's personnel record.

**Instructions**

Follow along with the instructor as he/she illustrates how to use the menu path to access PA10 and search for employee Maureen Ahmed by using the matchcode and the employee's last name.

1. From the SAP Easy Access screen, double-click the Favorites link for **PA10 - Personnel File**.

   You could also use the Menu Path: Human Resources > Personnel Management > Administration > HR Master Data > Personnel File

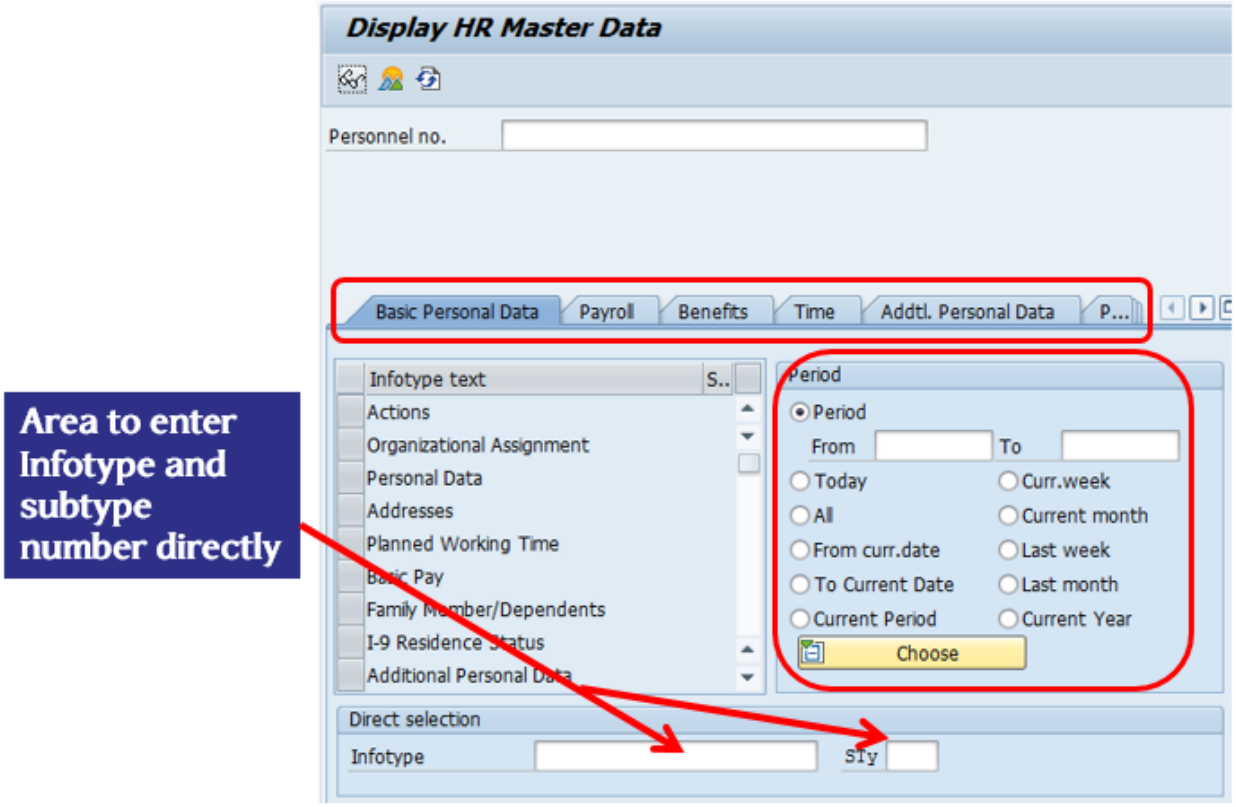
2. Click the **matchcode** button on the Personnel File screen.
3. At the *Personnel Number (1)* screen, type **Ahmed** in the Last Name field.
4. Click the **Start Search** button. A list is displayed, even if there is only one employee with the last name. Double-click the applicable employee. The employee's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

   **NOTE:** The Start Date on the Search results list is the Employee's birth date.

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

   **NOTE**: PERNR is a nickname for the **PER**sonnel **N**umbe**R**.

# PA20 Screen Functions




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

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

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

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

The left panel (which is called the Object Manager) can be hidden from view by selecting **Settings > Hide Object Manager** on the menu.

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# EXERCISE 2.3: Displaying an Employee's Personnel Record using PA20

**SCENARIO**

You need to find information for an employee (Nicole Milam). You will use the PA20 - Display Master Data transaction to access the employee's personnel information. You will also learn how to change from one transaction to another without going back to the SAP Easy Access screen.

**Instructions**

You will first learn how to change from one transaction code to another without going back to the Easy Access screen.

By using /nxxxx (where x represents the new transaction code), you can immediately go from one transaction to another. For example, /nPA20 immediately takes you to PA20. **Using this short cut method when you are entering data, however, does not prompt you to save your data before leaving the current screen.** You can also enter /n and then press enter to take you directly to the Easy Access screen. If you are already on the Easy Access screen, you do not need to enter /n.

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

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

You are currently on the PA10 screen.

1. In the Command field, type **/nPA20**.
2. Press **Enter**.
3. Hide the Object Manager by clicking Settings > Hide Object Manager on the menu.

   🗁 If you need to display the Object manager again, click **Settings > Show Object Manager**.

4. At the *Display HR Master Data* screen, type **=n.milam** in the *Personnel No.* field.
5. Press **Enter**.
6. Follow your instructor as he/she leads you in learning how to directly access infotypes.

7. Click **Back** to return to SAP Easy Access screen when you have viewed the areas as directed by your instructor.

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## EXERCISE 2.4: Using PA20 to Display Infotypes

**SCENARIO**

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

- ***Infotype***: Actions
- ***Transaction Code***: PA20
- ***Employee Name***: Nicole Milam

**Instructions**

1. Use the information you learned in the previous exercise to complete the request for information below:

**Questions/Results**

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

B. Was the employee's salary affected by any of the Actions? _____

C. If yes, what was the previous annual salary? _____

D. If yes, what was the previous monthly salary? _____

E. What is the current annual salary? _____

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

2. Click **Back** to return to SAP Easy Access screen when you have viewed the areas as directed by your instructor.

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## EXERCISE 2.5: On Your Own!

**SCENARIO**

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

- ***Infotype***: Actions
- ***Transaction Code***: PA20
- ***Employee Name***: Elizabeth Watkins

**Instructions**

1. Use the information you learned in the previous exercise to complete the request for information below:

**Questions/Results**

A. What is the marital status? _____

B. True or False: The employee's Personnel Number is the same as the Social Security Number. _____

C. What is the employee's military status? _____

D. Has the employee identified disability status? _____

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

2. Click **Back** to return to SAP Easy Access screen when you have viewed the areas as directed by your instructor.

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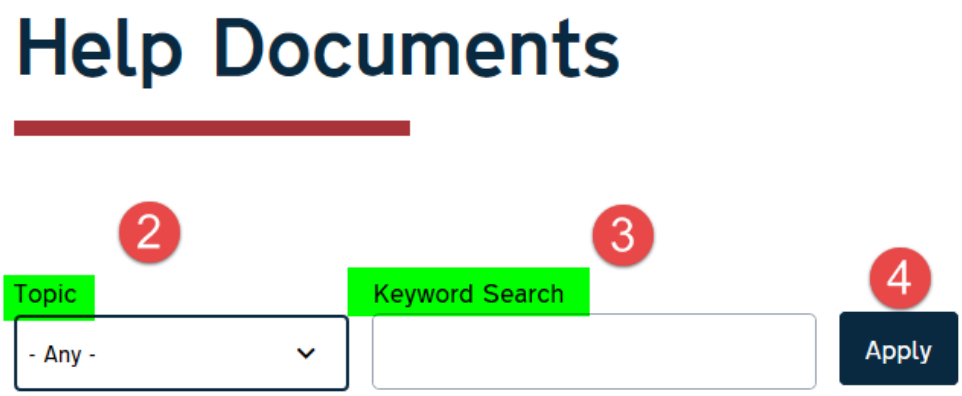
# Access Training HELP

1. Open a new tab in the web browser and go to the Training HELP Page:

   **https://www.osc.nc.gov/state-agency-resources/training/training_help_documents**

2. Click on **Topic** and select **Personnel Administration**. (This will narrow your search.)
3. Click in the **Keyword Search** field and enter a key word from the title and/or the description of the document.
4. Click the **Apply** button.




## ***KNOWLEDGE CHECK 2.1***

| QUESTION | ANSWER |
|---|---|
| 1. Enter the transaction code that is used to display individual infotypes. | _____ |
| 2. True or False: Events in the life cycle of an employee in the Integrated HR-Payroll System are defined by a specific infotype called Reasons. | _____ |
| 3. True or False: If an infotype does not display, it could be because it was not valid during the time period you have selected. | _____ |

# SUMMARY

In this lesson, you learned to:

- Differentiate between the two display transactions
- Locate employees in the Integrated HR-Payroll System
- Display an Action and associated reason for the Action
- Display an individual infotype

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# LESSON 3: COURSE REVIEW

## Objectives

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

## Next Steps

- Monitor the Integrated HR-Payroll System communication
  - BEST Shared Services web site

    URL: **https://www.osc.nc.gov/state-employees/BEST**
  - Review conceptual materials
  - Access the Training HELP site

    URL: **https://www.osc.nc.gov/training**
  - Practice what you've learned

    URL: **https://mybeacon.nc.gov**
  - Client 899

    Use your current NCID user name and password

Keep your training materials close by as a ready reference.

*Want to practice what you have learned?*

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

*Need transactional assistance?*

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed 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!**