

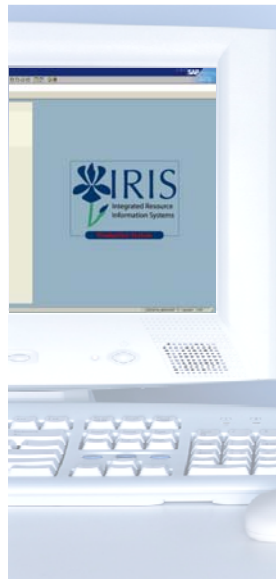


Position Creation

HR_OM_320



Prerequisites and Roles



- Prerequisites
 - ♦ UK_100 IRIS Awareness & Navigation
 - ♦ HR_200 Human Resources Overview
 - If you have not completed both of these prerequisite courses, please do so prior to taking this course.
- Roles
 - ♦ This course is primarily intended for departmental Business Officers responsible for creating and maintaining student, faculty, and temporary positions.

Course Content



- Unit 1 – Organizational Structure Overview
- Unit 2 – Position Creation
- Unit 3 – Position Display
- Unit 4 – Position Maintenance
- Course Summary



Course Learning Objectives



- Review terms and concepts associated with Position Creation as it relates to the University of Kentucky
- Learn how to process the following tasks:
 - ♦ Create Single and Multiple Positions
 - ♦ Display Position Information
 - ♦ Change a Position Infotype Record
 - ♦ Create a New Position Infotype Record
 - ♦ Delimit a Position



Course Completion Requirements



- In order to receive full credit for the Position Creation course, you must successfully complete the following:
 - ♦ **Check for Understanding** – This is a series of questions (a quiz) which will be presented at the end of each unit in this WBT (HR_OM_320). You must pass a unit’s Check for Understanding before proceeding to the next unit.
 - ♦ **Position Creation Assessment** – This is a series of practical, hands-on exercises that you will perform in the **HR_OM_321 Position Creation Assessment** WBT. The exercises will reinforce the key learning objectives covered in the Position Creation course.

Unit 1



Organizational Structure Overview

Organizational Structure



- Creating, displaying, and maintaining positions takes place in the Organizational Management (OM) component of the IRIS–HR module.
- There are three primary objects used in OM:
 - ♦ Organizational Unit
 - ♦ Job
 - ♦ Position
- These objects build what is called the Organizational Structure for the University (a hierarchical view of the University and its reporting relationships). Each object has defining attributes that are inherited by the employee(s) linked to them in the structure.

OM Object Definitions



- An **Organizational Unit** is any type of organizational entity found at the University (Colleges, Departments, Divisions, Etc.). For example:
 - ♦ College of Nursing
 - ♦ College of Engineering
 - ♦ Biology
 - ♦ Earth and Environmental Sciences
 - ♦ Housing
 - ♦ Pediatric Surgery
 - ♦ Critical Care Services



OM Object Definitions (Continued)



- A **Job** provides a general classification of tasks that routinely are performed together and describes a position by its EEO category, job group, and census code. For example:
 - ♦ Staff Support Associate I
 - ♦ Account Clerk III
 - ♦ Regular Faculty
- A **Position** is described by a job, belongs to an organizational unit, and can be occupied (held) by one or multiple employees. For example:
 - ♦ Staff Support Associate I
 - ♦ Student/Non-Work Study
 - ♦ Professor

Job vs. Position

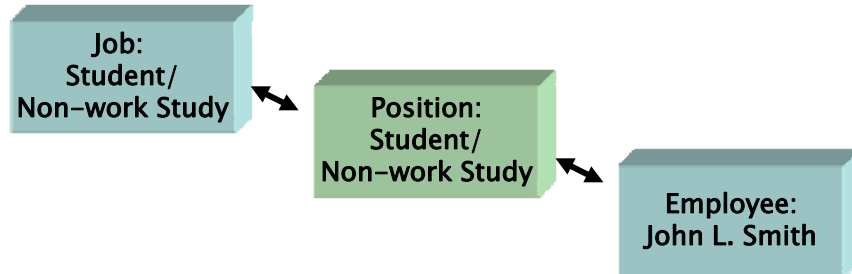


- **Job**
 - ♦ Created/maintained by HR Compensation only
 - ♦ Establishes pay grade, EEO category, and job group
 - ♦ Provides the basis for the creation of various positions with similar tasks and characteristics
- **Position**
 - ♦ Created/maintained by HR Compensation (regular staff positions) and Business Officers (student, faculty, and temporary positions)
 - ♦ Inherits attributes from a job
 - ♦ Assigned relationships with a specific organizational unit and (unless vacant) specific employee(s)

Integration Point – Position



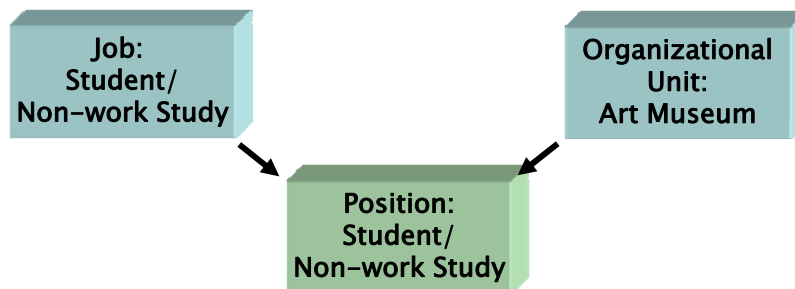
- A position is the integration point between the job and the employee.



Relationships



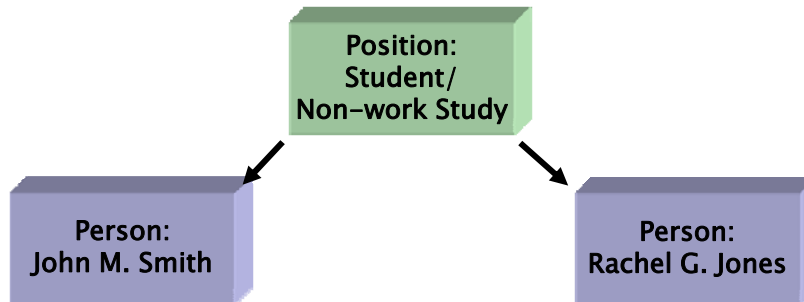
- During the position creation process, positions are assigned relationships to:
 - ♦ A job, which describes the pay grade, EEO category, and job group; and
 - ♦ An organizational unit, which defines the reporting structure.



Relationships (Continued)



- Positions also have a relationship to:
 - ♦ A person or a pool of people who hold the position.
 - A relationship record is automatically added by IRIS when a hiring action (transaction **PA40**) is processed using the position.



Job/Position Titles



- The University requires that all job and position titles be validated.
- The majority of jobs and associated positions have the same object abbreviation and title, such as:
 - ♦ **Staff Jobs**
 - If a job has an abbreviation of "A0178M2" and title of "Counsel General Associate", the position should have the same abbreviation and title.

Job/Position Titles (Continued)



- There are a few exceptions, such as:
 - ♦ Staff Jobs
 - Coaches
 - Should have the same abbreviation as the job, for example “N2241M6”
 - Title should be more specific though, such as “Basketball Coach” instead of the job’s title of “Coach”
 - VP, EVP, etc.
 - Should have the same abbreviation as the job, for example “N0003M1”
 - Title should be more specific, such as “Vice President of Academic Affairs”, instead of the job’s title of “Vice President”

Faculty Job/Position Titles



- Faculty job and position titles will also be different.
- They should be validated against the combination of the titles series (for the job) and the rank (for the position).
 - ♦ The **Faculty Title Series & Rank Chart** Quick Reference Card (QRC) is available at:
http://myhelp.uky.edu/rwd/HTML/HR/QRC_Title_Rank.pdf.



Faculty Job/Position Titles Example



Object Abbreviation



- The following outlines each character in the Object Abbreviation:
 - ♦ 1st Character = EEO Classification
 - A - H10 Executive, Administrative, Managerial
 - F - H20 Faculty
 - P - H30 Professional
 - C - H40 Office and Clerical
 - T - H50 Technical/Paraprofessional
 - K - H60 Skilled Craft
 - S - H70 Service and Maintenance
 - N - Not Classified
 - ♦ 2nd - 5th Characters = Random number

Object Abbreviation (Continued)

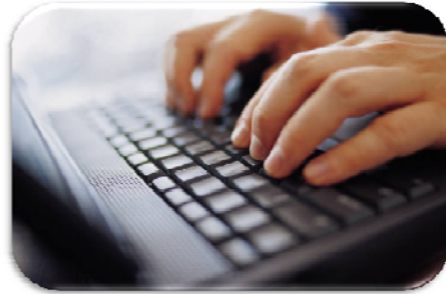


- ◆ 6th Character = Area
 - M - Campus or H - Hospital

- ◆ 7th Character = EEO Subcode
 - 1 - Executive - Only used with A EEO Classification
 - 2 - Administrative - Only used with A EEO Classification
 - 3 - Managerial - Only used with A EEO Classification
 - 4 - Health - Only used with P EEO Classification
 - 5 - Admin. Support - Only used with P EEO Classification
 - 6 - Student Support - Only used with P EEO Classification
 - 7 - Technical Support - Only used with P EEO Classification
 - 8 - Clerical Non-Admin. - Only used with C EEO Classification
 - 9 - Clerical Administrative - Only used with C EEO Classification
 - 0 - No subcode



Unit 1 Check for Understanding



Position Creation

Position Creation Responsibilities

- HR Compensation is responsible for creating and maintaining all regular staff positions, with a few exceptions.
- Business Officers are responsible for:
 - ♦ Creating and maintaining positions for students, faculty, and temporary employees; and
 - ♦ Maintaining the cost distribution record on all positions in their organizational unit.



Position Creation – Patient Contact



- For any regular position outside the hospital in which the employee will have direct contact with patients, write “**Patient Contact**” across the top of the Job Analysis Questionnaire (JAQ) form.
 - ♦ If using the On-line Employment System to submit position descriptions, be sure to select “**Patient Contact**”.
 - ♦ All hospital positions, regardless of duties, will have this relationship created automatically.



Create Position – ZPOS



- Transaction **ZPOS** is used to create positions, and all three sections of the screen must be completed.

Create Position

Position Info

Short text

Long text

Position begin date 05/19/2010 Position end date 12/31/9999

Copy position Number to create

Pooled position

Relationship Objects

Position Reports To Pos. Num.

Organizational unit

Job key

Main cost center

Position FTE

Employee group Personnel area

Employee subgroup Personnel subarea

Cost Distribution

Cost Center	Order	WBS	Pct	Fund	Funct Area	Grant

Position Info Section – ZPOS



- The position's **Short text** and **Long text** are copied from the job after the entire **ZPOS** screen is completed and the system creates the position. Thus, initially:
 - ♦ For student and temporary positions, enter the word “**test**” in both fields.

Position Info	
Short text	test
Long text	test

- ♦ For faculty positions, enter the word “**test**” in the **Short text** field and the rank in the **Long text** field.

Position Info	
Short text	test
Long text	Professor

- The **Long text** field value for a faculty position must match the correct rank or an error message will occur.

Position Info Section – ZPOS (Continued)



- The **Position begin date** defaults to the current date.
- If hiring immediately, ensure this date coincides with the employee's start date. Otherwise, the current date is usually sufficient.
 - ♦ If the employee starts July 1 and the **Position begin date** is July 15, the New Hire Action (**PA40**) will result in an error.

Position begin date	05/19/2010	Position end date	12/31/9999
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- 📌 The **Position end date** defaults to 12/31/9999. This date should not be changed during the creation process! The date can be changed later using the **Delimit** function (covered in the **Position Maintenance** unit).

Position Info Section – ZPOS (Continued)



- To create a single position, do not click in the **Copy position** checkbox and leave the **Number to create** field empty.

Copy position	<input type="checkbox"/>	Number to create	
---------------	--------------------------	------------------	--

- To create multiple, identical positions, click in the **Copy position** checkbox to select and enter the total number of positions to create in the **Number to create** field.

Copy position	<input checked="" type="checkbox"/>	Number to create	2
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Position Info Section – ZPOS (Continued)



- A non-pooled position should be held by only one person at a time.
- A pooled position can be held by multiple people, up to a maximum of 50 people.
- Typically, pooled positions are temporary or student positions.
- Click in the **Pooled position** checkbox to select, if applicable.

Pooled position	<input checked="" type="checkbox"/>
-----------------	-------------------------------------

Relationship Objects Section – ZPOS



- **Position Reports To Pos. Num.** – Enter the position number of the position to which this position will report.
- **Organizational unit** – Enter the 8–digit, IRIS department number. If unknown, use the **Possible Entries** icon to search.
- **Job key** – Enter the 8–digit, IRIS job key number. If unknown, use the **Possible Entries** icon to search.
 - ♦ **Tip:** Either the title of the job or the object abbreviation code (i.e. N8291M0) can be used in the search window.

Relationship Objects		
Position Reports To Pos. Num.	50105721	N0056M1 Provost
Organizational unit	30000582	8H700 Mechanical Engineering
Job key	40501148	N8291M0 Student/Non-Work Study

Searching for Organizational Unit & Job Key



- Use the **Possible Entries** icon to search for these values if unknown. Enter one word in the name with the “wild card” (*) on both sides, press **Enter**, then double-click on the desired name in the results window.

Organizational unit

Organizational Unit (1)

Search Term: *mechanical*

Object ab...	Object name	Start date	End Date
8H700	Mechanical Engineering	01/01/1950	12/31/9999

Job key

Job (1)

Search Term: *student*

Object ab...	Object name	Start date	End Date
C0089M9	Student Affairs Coordinator	01/01/1950	12/31/9999
N8241M0	Student Teaching Assistant	01/01/1950	12/31/9999
N8291M0	StudentNon-Work Study	01/01/1950	12/31/9999
N8295M0	StudentWork Study	01/01/1950	12/31/9999
0000000	Student Services Director	01/01/1950	12/31/9999

Relationship Object Section – ZPOS (Continued)



- Enter a **Main cost center** and **Position FTE** only for regular faculty positions.

Main cost center	1012550040
Position FTE	100.00

- ♦ **Main cost center**

- Cost Center assigned as the “prime” account
- Displayed on the employee’s Organizational Assignment (0001) infotype
- Creates a relationship to a cost center

- ♦ **Position FTE**

- Monitored by the same table that monitors the FTE on the Planned Working Time (0007) infotype
- Values will be driven by the Personnel Subarea ranges
- Used for Position Budget Control reporting

- These two fields are also completed for all regular staff and Weekend Premium Pay (WEPP) nurse positions.

Relationship Object Section – ZPOS (Continued)



- Enter the appropriate **Employee group** and **Personnel area** first, before entering the **sub-categories**. If unknown, use the **Possible Entries** icon to search.

- ♦ By using this method, the choices available in the **sub-categories** will be reduced to only the ones which pertain to the specified **group** and **area**.

Employee group	B	Students	Personnel area	1000	Main Campus
Employee subgroup	09	Student	Personnel subarea	0013	Temp PT < .20

EEGrp	Name of EE Group
A	Staff
B	Students
C	Faculty
D	Post Doctor
E	House Staff

ESgrp	Name of EE subgrp
04	Exempt Biweekly
08	Work Study Student
09	Student
10	Research Assistant
11	Teaching Assistant
12	Graduate Assistant
13	Fellowship
35	Non-Exempt Monthly

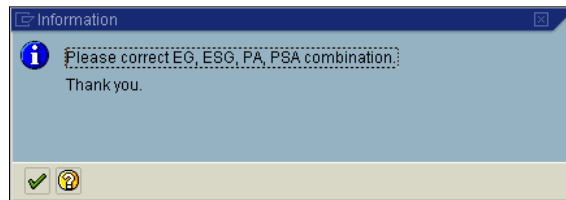
PA	Personnel Area T...	CoCd	CGrg
1000	Main Campus	UK00	10
1100	STEPS	UK00	10
1200	Physical P		
1300	Extension		
1400	County Ag		

PSubarea	PSubarea text
0001	Reg FT
0002	Reg PT-Faculty
0003	Reg PT > .74
0004	Reg PT .50-.74
0005	Reg PT .20-.49
0006	Temp FT
0007	Temp PT > .20
0011	Unpaid
0012	Non-Service
0013	Temp PT < .20

Relationship Object Section – ZPOS (Continued)



- Invalid **Personnel area/subarea** and **Employee group/subgroup** combinations will result in a system message and must be corrected prior to the system generating the position.



- The complete list of combinations are found at:
 - ♦ http://myhelp.uky.edu/rwd/HTML/HR/QRC_Personnel_Area_Subarea.pdf
 - ♦ http://myhelp.uky.edu/rwd/HTML/HR/QRC_Employee_Group_Subgroup.pdf

Cost Distribution Section – ZPOS



- Although multiple lines appear available, enter only one **Cost Center** at 100%.
 - ♦ Also enter **UK00** in the **CtrlA** (Controlling Area) field
 - ♦ Do not use the **Order, WBS, Fund, Funct Area** or **Grant** fields
- If the position is to have split funding, the cost distribution needs to be updated using transaction **PP01, Cost Distribution** infotype, after the position has been created (covered in the **Position Maintenance** unit).

Cost Distribution							
CtrlA	Cost Center	Order	WBS	Pct	Fund	Funct Area	Grant
UK00	1011662140			100.00			

Create Position – ZPOS – Final Step



- After completing all of the required/appropriate fields, press **Enter** to validate the information.
- When ready, click on the **Execute** icon to create the position(s).

CtrA	Cost Center	Order	WBS	Pct	Fund	FunctArea	Grant
UK00	1011682149			100.00			

Create Position – ZPOS – Final Step (Continued)



- Once successfully created, the system will display an informational message in the Status Bar listing the position number(s), which will start with a “5”.

The following positions were created successfully: 51001076 - 51001077

- **Note:** If you clicked on the **Execute** icon and created multiple positions at the exact same time as another user on campus, the position number range displayed may be greater than expected.
 - ♦ Your specific position numbers can be found in transaction **PPOSE** when displaying all of the positions in your organizational unit (covered in the **Position Display** unit). Since position numbers are randomly assigned by the system in ascending order, the newest position numbers should be at the bottom of the list of positions.



Unit 2 Check for Understanding

Unit 3



Position Display

Position Display – PP01



- Transaction **PP01** is used for general navigation when maintaining positions, and the object (position) is locked while working in this transaction.
- Positions include the following infotypes in **PP01**:
 - ♦ 1000 – **Object** (short and long text)
 - ♦ 1001 – **Relationships** (to organization unit, job, holder, etc.)
 - ♦ 1008 – **Account Assignment Features** (Personnel area and Personnel subarea)
 - ♦ 1013 – **Employee Group/Subgroup**
 - ♦ 1018 – **Cost Distribution**

Position Display – PP01 (Continued)



- The following “header” information will be displayed at the top of every infotype record:
 - ♦ **Position** – Object abbreviation and position title
 - ♦ **Planning Status** – Indicates this is an “Active” position
 - ♦ **Valid from/to** – Beginning and ending dates of the position
 - ♦ **Change Information** – Click on this button to display the date and ID of the user who initiated the last change to this information

Position	N8291M0	Student/Non-Work Study
Planning Status	Active	
Valid from	05/03/2010	to 12/31/9999
		Change Information

Position Display – PP01 (Continued)



- To display position information:
 1. Select the **Plan Version = 01 Current plan**
 2. Select **Object Type = S Position**
 3. Enter the **Object ID = The position number**
 4. Press **Enter**

Object Manager

Position Display – PP01 (Continued)



5. Select the desired **Time period**
 - This determines the date range to be displayed.
 - In this example, you would see only valid records from 05/03/2010 forward.
 - To see the complete list of records for the infotypes, click in the radio button next to **All**.

Select.

Position Display – PP01 (Continued)



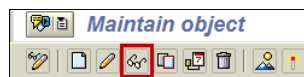
6. Select the desired infotype by clicking on the gray selection box to the left
 - The green checkmarks in the right column signify that records exist in those infotypes.

Infotype Name		Time pe
Object	✓	Perf
Relationships	✓	From
Description	✓	To d
Department/Staff		All
Planned Compensation		From
Vacancy		To c
Acct. Assignment Features	✓	
Authorities/Resources	✓	
Work Schedule	✓	
Employee Group/Subgroup	✓	

Position Display – PP01 (Continued)



7. Click on the **Display infotype** icon to see the current record



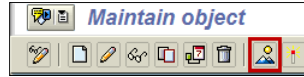
- If more than one record exists, use the **Previous/Next Record** icons in the Application Toolbar to scroll through the records; or you can manually enter the **Record** number in the lower-right corner of the screen and press **Enter**.

Record 2 of 3

Position Display – PP01 (Continued)



- Click on the **Overview** icon to see a list of all records



- To display a single record from the list, click on the gray selection box to the left of the record to select, then click on the **Choose** icon in the Application Toolbar.

Start	End	R.	Rel.	Relat.text	R.	Rel'd objec...	Abbr.	% Rate
05/03/2010	12/31/9999	A	002	Reports (I	S	50105721	N0056M1	0.00
05/03/2010	12/31/9999	A	003	Belongs to	O	30000374	7H100	0.00
05/03/2010	12/31/9999	B	007	Is describ	C	40501148	N8291M0	0.00

Object (1000) Infotype



- This infotype shows the position's **Object abbreviation** and title (**Object name**).

Position: N8291M0 StudentNon-Work Study
Planning Status: Active
Validity: 05/03/2010 to 12/31/9999 Change Information

Object
Object abbr.: N8291M0
Object name: StudentNon-Work Study
Language Key: EN English

Record 1 of 1

Relationships (1001) Infotype



- This infotype defines the relationships that exist with the position.
- Includes ties to organizational unit, job, employees, etc.

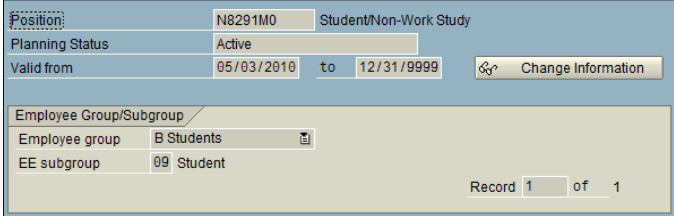
Acct. Assignment Features (1008) Infotype



- This infotype displays information about the position that relates to the Enterprise Structure.
 - ♦ **Personnel area** – indicates the location
 - ♦ **Personnel subarea** – indicates the FTE status (range)

Employee Group/Subgroup (1013) Infotype

- This infotype also displays information about the position that relates to the Enterprise Structure.
 - ♦ **Employee group** – indicates if Faculty, Staff, Student, etc.
 - ♦ **Employee subgroup** – indicates different types of employees/students within a group and often the pay frequency (i.e. Exempt Monthly, Student, Teaching Assistant, Non-Exempt 40 hour, 9 mo Deferred Pay, etc.)

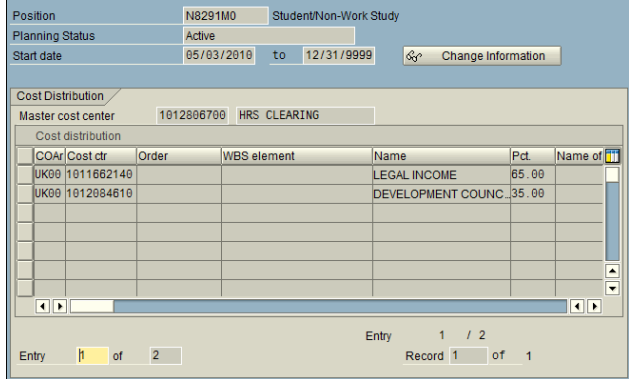


Position: N8291M0 Student/Non-Work Study
 Planning Status: Active
 Valid from: 05/03/2010 to 12/31/9999

Employee Group/Subgroup
 Employee group: B Students
 EE subgroup: 09 Student
 Record 1 of 1

Cost Distribution (1018) Infotype

- This infotype displays the position’s funding cost distribution, driven by a percentage (Pct.) breakdown.
- A position can be funded by multiple **Cost Centers**, grants (**WBS element**), or (internal) **Orders**.



Position: N8291M0 Student/Non-Work Study
 Planning Status: Active
 Start date: 05/03/2010 to 12/31/9999


Cost Distribution
 Master cost center: 1012806700 HRS CLEARING

COAr	Cost ctr	Order	WBS element	Name	Pct.	Name of
UK00	1011662140			LEGAL INCOME	65.00	
UK00	1012084610			DEVELOPMENT COUNC.	35.00	

Entry 1 of 2
 Record 1 of 1

Cost Distribution (1018) Infotype (Continued)



- The Cost Distribution (0027) infotype in **PA20** is similar to infotype 1018, but is established either by the Faculty Effort System for faculty with a DOE or Business Officers for any employee who needs to be charged to a different cost distribution than what was set up originally for the position in infotype 1018.
 - The **Master cost center** field contains the cost center where payroll charges will be incurred if the 1018 or 0027 Cost Distribution records are invalid.
 - The **Cost ctr** column contains the account(s) where payroll charges will be incurred if there is no valid 0027 Cost Distribution record established.
-  The **Order** and **WBS element** columns should not be used as a primary funding source for a position.

Object Manager – PP01



- The Object Manager section of the screen can be used to search for a position by:
 - ♦ The position title or number (**Search term**) or
 - ♦ Organizational Unit (**Structure search**).
- **Search term**
 - ♦ Enter either a position number (with no *) or a word in the name of the position (using the * as needed), then press **Enter**.



Find Position

With name: 51001075

Assigned to: []

Object: []

Find [X]

Find Position

With name: *student*

Assigned to: []


Object: []

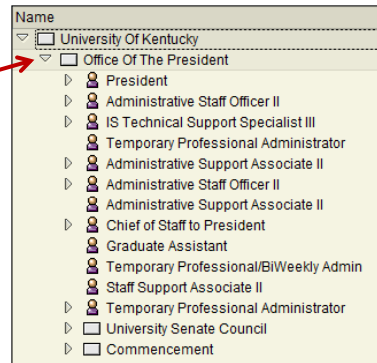
Find [X]

Object Manager – PP01 (Continued)



- **Structure search**

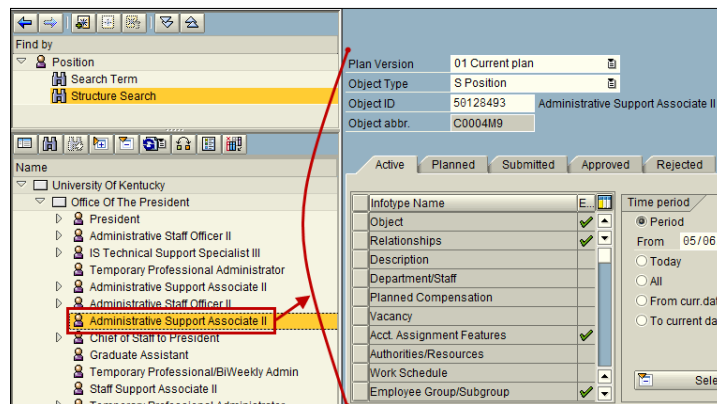
- ♦ Use this option to search the University's structural organization to find a position within your organizational unit. The structure displayed will be determined by your security access.
- ♦ If necessary, click on the triangle to the left of your organizational unit to display all of the positions. 
- ♦ **Note:** Positions without a triangle next to them indicate vacant positions.



Object Manager – PP01 (Continued)



- Once the desired search results are displayed in the lower-half of the Object Manager, double-click on the position to update the central screen with that position's information.



Object Manager – PP01 (Continued)



- You can show/hide additional columns of data in the Object Manager by clicking on the **Column Configuration** icon, and then selecting/unselecting the columns listed.

Before

Name	Code
University Of Kentucky	UK
Office Of The President	10000
President	N0001M1
Administrative Staff Officer II	P0232M5
IS Technical Support Special	P0422M7
Temporary Professional Adm	N5121M5
Administrative Support Assoi	C0004M9
Administrative Staff Officer II	P0232M5
Administrative Support Assoi	C0004M9
Chief of Staff to President	N0064M1

After

Name	Code	E. ID	Valid from	Valid to	Assigned as...	Assigned until
University Of Kentucky	UK	O 30000001	01/01/1950	Unlimited	01/01/1950	Unlimited
Office Of The President	10000	O 30000002	01/01/1950	Unlimited	01/01/1950	Unlimited
President	N0001M1	S 50105338	01/01/1950	Unlimited	01/01/1950	Unlimited
Administrative Staff Officer II	P0232M5	S 50105339	01/01/1950	Unlimited	01/01/1950	Unlimited
IS Technical Support Special	P0422M7	S 50106385	01/01/1950	Unlimited	01/01/1950	Unlimited
Temporary Professional Adm	N5121M5	S 50116867	01/01/1950	Unlimited	01/01/1950	Unlimited
Administrative Support Assoi	C0004M9	S 50125854	01/01/1950	Unlimited	01/01/1950	Unlimited
Administrative Staff Officer II	P0232M5	S 50127848	01/01/1950	Unlimited	01/01/1950	Unlimited
Administrative Support Assoi	C0004M9	S 50128493	01/01/1950	Unlimited	01/01/1950	Unlimited
Chief of Staff to President	N0064M1	S 50129031	01/01/1950	Unlimited	01/01/1950	Unlimited

Object Types



- The five basic object types seen in the **ID** column that are considered the building blocks are:
 - Organizational Units Object type "O"
 - Jobs Object type "C"
 - Positions Object type "S"
 - Cost Centers Object type "K"
 - Persons Object type "P"

Name	Code	E. ID
University Of Kentucky	UK	O 30000001
Office Of The President	10000	O 30000002
President	N0001M1	S 50105338
Denzel Washington	Washingt...	P 00028520
Administrative Staff Officer II	P0232M5	S 50105339
Linda Hamilton	Hamilton	P 00028525
IS Technical Support Special	P0422M7	S 50106385
Barbara Konan	Konan	P 00028558
Temporary Professional Adm	N5121M5	S 50116867

Organization and Staffing Display – PPOSE



- This transaction allows users to display departmental/unit organizational structure information.
- Drill-down features permit the display of positions and detailed information.
- The system will display only the department/unit to which the individual has security access.

Object Manager – PPOSE



- The Object Manager in **PPOSE** functions like the Object Manager in **PP01**, except there are a few more organizational objects available to use in searching.

Organization and Staffing Display

Find by:

- Organizational Unit
- Position
- Job
- Person
- User
- Task
- Object History

Object Manager

Organizational Management

This is the initial screen for maintaining your enterprise's organizational plan. You can create your **Organizational structure** and **Staff assignments** for each organizational unit.

The user interface is divided into four areas:

- In the **Search area** on the left of the screen, you can use the search functions to find individual organizational objects. The results of this search are displayed in the **Selection area**.
- These organizational objects can be transferred from here to the central area of the screen, the **Overview area**, where they are displayed within their organizational environment.
- The bottom area of the screen is the **Detail area**. Information about individual objects is displayed and can be edited in the detail area.

Getting started:

- Using **Goto** -> **Change View**, choose the view with which you want to work.
- If you have already created your enterprise's organizational plan, use one of the search functions to select an organizational object, and then transfer the object to the overview area by double-clicking.
- If you have not already created your enterprise's organizational plan, switch to create mode. In the SAP menu, choose **Human Resources** -> **Organizational Management** -> **Organizational Plan** -> **Organization and Staff Assignment** -> **Create**. Beginning with a root organizational unit, create an organizational structure and staff assignment plans.

For more detailed documentation, choose:

- **Help** -> **Application help** (context-related documentation)
- **Help** -> **SAP Library** -> **Personnel Management** -> **Organizational management** (complete documentation)

Object Manager – PPOSE (Continued)



- Once the search results are seen in the bottom half of the Object Manager, double-click on the desired item and the information in the central part of the screen will be updated accordingly.

The Column Configuration icon is available to show/hide other columns.

Holder	Percentage	Assigned	Description
George E Mitchell	100.00	12/01/2000	0001 General
Warren H Evers	100.00	12/01/2000	
Christopher R Hogan	100.00	12/01/2000	
Brent Hire Test	100.00	02/01/2000	
Amanda Ann Tyler	100.00	12/01/2000	

Central Screen – PPOSE



- Double-click on various objects in the upper-half of the central screen, and the lower-half will update accordingly.

Position assignment 05/07/2010

Icon	Existence	Position	Job	Organizational unit	Percenta	Valid On
		Associate Professor	Regular Faculty	Anatomy & Neurobiology	100	05/07/2010

Details for Person George E Mitchell

Name	George E Mitchell	Empl. %	100.00
EE group	0 Faculty	Pers area	1000 Main Campus
EE subgroup	03 Exempt Monthly	Pers. subarea	0001 Reg FT

- Tabs with the green checkmark indicate that information exists.

Central Screen Validity Period – PPOSE



- The information seen in the central screen is what is valid for only the time period indicated at the top.
- This can be changed by clicking on the **Date and preview period** icon, entering a desired **Start date** and **Time period**, then clicking on the **Execute** icon in the lower-left corner of the window.

Staff Assignments (Structure)	Code	ID
Anatomy & Neurobiology	7H100	O 300
Associate Professor	F8501M0	S 501
George E Mitchell	Mitchell	P 000
Professor	F8501M0	S 501

Specify date and preview period

Start date: 05/07/2010

Preview period to:

Time period: A Complete in the future

End date: Complete

Preview period: M Months

W Weeks

Y Years

Delimited Objects – PPOSE



- A pink arrow next to an object indicates it has been delimited.
- This could be seen in either the Object Manager or the central screen in PPOSE.

Staff Assignments (Structure)	Code	ID
StudentNon-Work Study	N8291M0	S 50210791
Temporary Technical/Paraprof	N6945M0	S 50210958
Temporary Professional Non-	N5120M5	S 50223323
Graduate Research Assistant	N8251M0	S 50224740
Fellowship Payment	N9066M0	S 50224742
StudentNon-Work Study	N8291M0	S 51001075
Anatomy & Neurobiology	7H081	O 30000375

Details for Organizational Unit Anatom

Basic data Account assignment Cost distribution

Organizational Unit 7H100 Anatomy & Neurobiology

Hit list

Icon	Existence	Name
		StudentNon-Work Study



Unit 3 Check for Understanding

Unit 4

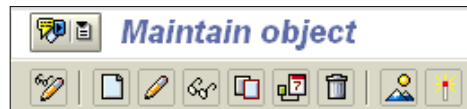


Position Maintenance

Position Maintenance



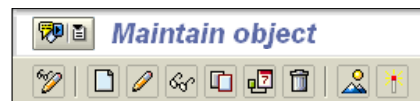
- Positions are maintained using transaction **PP01**.
- Changing/creating an infotype on a position does not update an employee's master data record, if the position is filled.
 - ♦ The employee's record is updated using the appropriate Action Type in transaction **PA40** after the position has been updated (using **PP01**).
- Several of the icons in the Application Toolbar are used to maintain a position's infotypes.



Display <-> Change Icon



- The **Display <-> Change** icon is used to toggle between:
 - ♦ Change (**Maintain**) mode



and

- ♦ **Display** mode



Display Infotype Icon



- The **Display infotype** icon is used to simply open the selected infotype's current, active record.
- To use this icon:
 - ♦ Select the infotype to display
 - ♦ Click on the **Display infotype** icon
- If multiple records exist for an infotype, use the **Previous/Next record** icons in the Application Toolbar to scroll between the records.



Overview Icon



- The **Overview** icon can be used to display all of the records (current and historical) for a selected infotype on one screen.

Start	End	R.	Rel.	Relat.text	R.	Rel'd objec...	Abbr.	% Rate
04/30/2010	06/30/2011	A	002	Reports (I	S	50105721	N0056M1	0.00
04/30/2010	06/30/2011	A	003	Belongs to	O	30000374	7H100	0.00
04/30/2010	06/30/2011	B	007	Is describ	C	40501148	N8291M0	0.00


- To use this icon:
 - ♦ Select the appropriate infotype
 - ♦ Click on the **Overview** icon
- To view a single record in the list, select the record, then click on the **Choose** icon in the Application Toolbar.




Change Infotype Icon



- The **Change infotype** icon is used when **an error occurred** in creating an infotype record.
 - ♦ Example: A position was assigned to an incorrect organizational unit while creating the position in **ZPOS**.

 The change will impact the entire validity period of the position, and **no historical record is kept!**

- To use this icon:
 1. Select the infotype to change
 2. Click on the **Change infotype** icon
 3. Make the change(s) (do **not** change the **Valid from** date!)
 4. Click on the **Save** icon

 If the organizational unit is changed, check the cost distribution to see if it needs to be changed as well!

Create Infotype Icon



- The **Create infotype** icon is used to create a new infotype record as of a point in time.
 - ♦ Example: A position's funding (Cost Distribution (1018)) is changing from one cost center to another.
- The fields on the screen will initially be blank. Thus, this is most useful when most or all of the data needs to be changed.
- The previous infotype record will be delimited and kept as history.
- To use this icon:
 1. Select the infotype to create
 2. Click on the **Create infotype** icon
 3. Enter the new **Valid from** date and the necessary data
 4. Click on the **Save** icon

Copy Infotype Icon

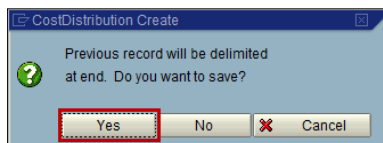


- The **Copy infotype** icon may also be used to create a new infotype record as of a point in time.
 - ♦ Example: A position's funding (Cost Distribution (1018)) is changing from a single cost center to a split between two cost centers.
- The current record's data will appear on the screen to help lessen the amount of data entry needed.
- The previous infotype record will be delimited and kept as history.
- To use this icon:
 - ♦ Select the infotype to copy
 - ♦ Click on the **Copy infotype** icon
 - ♦ Enter the new **Valid from** date and make the change(s)
 - ♦ Click on the **Save** icon


Delimiting Records Confirmation



- The following window will appear after clicking on the **Save** icon when using either the **Create infotype** or **Copy infotype** icons:



- Click on the **Yes** button to finish the process.

 Changing the validity date on an individual infotype record does not change the validity date on the position. However, changing the validity date on a position does affect the validity dates on the infotype records.

Maintaining the Organizational Unit Tip



- When searching for an organizational unit (in the Relationships (1001) infotype), be sure to use the **Possible Entries** icon (located on the right side of the field) instead of searching for and/or double-clicking on the unit in the **Object Manager**.

The screenshot shows the IRIS system interface for a position record. The position is identified as 'N8291M0 Student/Non-Work Study' with a planning status of 'Active' and a valid period from '04/30/2010' to '12/31/9999'. A 'Change Information' button is visible. The 'Relationships' section shows a relationship type of 'A 003 Belongs to'. The 'Related Object' section displays 'O Organizational Unit' with an ID of '30000374', an abbreviation of '7H100', and a name of 'Anatomy & Neurobiology'. A red 'X' is drawn over the search area on the left, and a red circle highlights the 'Possible Entries' icon (a magnifying glass with a plus sign) on the right side of the 'ID of related object' field. The bottom right corner of the record shows 'Record 2 of 3'.

Additional Relationships



- After creating a position, additional relationships may need to be created, depending on the type of position.
 - ♦ **Examples:**
 - VA Appointment – Faculty position being filled by a faculty member with a VA Appointment.
 - Patient Contact – Faculty or temporary position in which the employee will have direct contact with a patient. All positions in the UK Healthcare (Personnel Area 1500) should have this relationship added.
- Contact HR Compensation if assistance is needed.

Delimiting a Position



- This functionality is used to change a position's entire validity period, so that the end date occurs sooner than originally established (12/31/9999).

- Example: A position is delimited when it is no longer needed by the organizational unit.

From

Position	N8291M0	Student/Non-Work Study
Planning Status	Active	
Validity	01/01/1950	to 12/31/9999
		Change Information

To

Position	N8291M0	Student/Non-Work Study
Planning Status	Active	
Validity	01/01/1950	to 06/30/2007
		Change Information

WARNING – When you delimit a position, the system delimits all infotypes appended to the position, to the same date, including any employee(s) in the position!

Delimiting a Position (Continued)



- A pink arrow will be listed next to any object which has been delimited.

From

Student Teaching Assis	N8241M0	S	50110638
Student/Non-Work Stud	N8291M0	S	50110651
Brian Kelley	Kelley	P	00028366
Graduate Research As	N8251M0	S	50110747

To

Student Teaching Assistant	N8241M0	S	50110638
Student/Non-Work Study	N8291M0	S	50110651
Brian Kelley	Kelley	P	00028366
Graduate Research Assistant	N8251M0	S	50110747

Delimiting a Position – PP01



1. Ensure the **Plan version** is **Current plan**
2. Ensure the **Object type** is **S Position**
3. Enter the position number into the **Object ID** field

Plan Version	01 Current plan
Object Type	S Position
Object ID	51001075 Student/Non-Work Study
Object abbr.	N8291M0

Active Planned Submitted Approved Rejected

4. Press **Enter** to pull up the master data for the position

Delimiting a Position – PP01 (Continued)



5. Select **Object** → **Delimit** from the menu bar

Object Edit Goto Utilities Settings System Help

Display <-> Change Ctrl+F1

Copy...

Delimit...

Delete...

Exit Shift+F3

Plan Version	01 Current plan
Object Type	S Position
Object ID	51001075 Student/Non-Work Study
Object abbr.	N8291M0

Delimiting a Position – PP01 (Continued)



6. Enter the appropriate **Delimit date**

Object ID	51001075
Abbreviation	N8291M0
Name	Student/Non-Work Study
Settings	
Delimit date	06/30/2011
<input type="checkbox"/> Historical rec.	

Note: The **Delimit date** becomes the end date of **all** infotypes associated with the position.

7. Do **not** click in the **Historical Rec.** checkbox



You **cannot** change records once they are marked as historical!

8. Click on the **Delimit** icon in the lower-left corner

Delimiting a Position – PP01 (Continued)



9. Click on the **Yes** button when the **Delimit Object** window appears

Relationships still exist Position N8291M0
These relationships were also delimited

Do you want to delimit the object (incl. relationships and infotypes)?

- A system message will appear on the status bar confirming that the position has been delimited.

Object 01 S 51001075 is delimited on 06/30/2011



Unit 4

Check for Understanding

Course Summary

- Departmental Business Officers are responsible for creating and maintaining student, faculty and temporary positions.
- Transaction **ZPOS** is used only to create positions.
- Transaction **PP01** is used for maintaining position information.
- Transaction **PPOSE** is used for displaying organization and staffing structural information.

Position Creation Help Websites




- myHelp–HR & Payroll Help website:
 - ♦ <http://myHelp.uky.edu/rwd/HTML/HR.html>
 - ♦ Contains Quick Reference Cards, [printable course manuals](#), HR/Payroll Frequently Asked Questions, and the HR/Payroll Reference Manual
- IRIS–HR website:
 - ♦ <http://www.uky.edu/IRIS/HR/>
 - ♦ Contains HR/Payroll Reference Manual, Forms, and other references

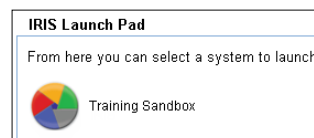



Position Creation Practice Guide



- The **Position Creation Practice Guide** is also available should you want some additional practice with the various transactions and processes discussed in this course.

 The exercises in the Practice Guide are to be performed in the **Training Sandbox** only!




 The Practice Guide is **optional** and **not a requirement** for completing this course!

- The Practice Guide is available on the myHelp website at: http://myhelp.uky.edu/rwd/HTML/HR/HR_OM_320.html.

Position Creation Assessment



- As a reminder, you must now complete the **HR_OM_321 Position Creation Assessment WBT**.
- The link to the assessment WBT will be listed in the **“Follow-Up Courses”** section of the myTraining page for this WBT.

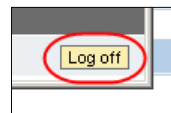
 Please wait until you have received confirmation for completing this WBT before accessing the assessment WBT!

****Click anywhere on this slide to advance to the last slide of this WBT.****

Course Completion



- To complete this WBT, click on the yellow **Log off** button in the lower corner of this window.



- ♦ **Note:** This window will close, and you should be returned to the main, myTraining page for this WBT. The main page will refresh (usually within 30 seconds, depending on network traffic), and you should receive a green, system message confirming your participation. For example:



You may then safely navigate away from the main page.