Personnel Administration
HR_PA_300

Course Content

• Overview
• Unit 1 – Master Data
• Unit 2 – New/Existing Personnel
• Unit 3 – Maintaining Employee Data
• Unit 4 – Funding and Cost Distribution
• Course Summary

• Assessment
Learning Objectives

- Review terms and concepts associated with Personnel Administration as it relates to UK
- At the end of this course you should be able to:
  - Display master data records
  - Identify changes for new & existing personnel
  - Make changes to existing personnel records
  - Enter and maintain cost distribution
  - Add new data records for existing personnel

Prerequisites and Roles

- Prerequisites
  - UK_100 SAP Awareness and Navigation
  - HR_200 Human Resources Overview

- Roles
  - Business Officers
  - Personnel Administrators
What is Personnel Administration?

Personnel Administration (PA) is used to:

* Process employee data
* Maintain employee information
* Administer personnel procedures

Personnel Administration (PA) Actions are used to:

* Hire new employees
* Promote, Demote, or Transfer employees
* Add Additional Assignments
* Manage Leave of Absences and Returns
* Separate and Retire employees
HR Security

- HR Security roles in Production will allow you to view HR data within your area of responsibility only
- You can search for an employee in the system if you are hiring him/her (additional assignment)
- Access also will be limited to necessary infotypes needed to fulfill your role
  - Example: you will have access to an employee’s HR Master Record within your organizational unit, but not to certain Benefits or Payroll infotypes, such as Health Plans (0167) or Bank Details (0009)
- Access also may be limited to display only, such as Residence Status (0094)

Unit 1

Master Data
Unit 1 – Master Data

• What is Organizational Management?
• Enterprise Structure
  • Personnel Area/Subarea
• Personnel Structure
  • Employee Group/Subgroup
• Organizational Structure
  • Organizational units/Jobs/Position
• Organization and Staffing
  • PPOSE
  • Position Funding

Key Terminology

<table>
<thead>
<tr>
<th>Terminology</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction code</td>
<td>Provides access to screens in IRIS (PA20, PA30, ZHR_PAR)</td>
</tr>
<tr>
<td>Infotypes</td>
<td>Used to access a set of data grouped according to subject matter</td>
</tr>
<tr>
<td>Person ID</td>
<td>IRIS assigns a unique identifying number to each employee rather than using their social security number</td>
</tr>
<tr>
<td>Personnel Assignment Number</td>
<td>The relationship between an employee/retiree and UK, each personnel assignment is uniquely identified in IRIS by the personnel number and position number</td>
</tr>
<tr>
<td>Position</td>
<td>Described by a job and related to an organizational unit; may be held by one person or many people</td>
</tr>
</tbody>
</table>
Key Terminology

<table>
<thead>
<tr>
<th>Terminology</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Area</td>
<td>Defines a specific area within the University (units, colleges, departments, etc.)</td>
</tr>
<tr>
<td>Personnel Subarea</td>
<td>Assigned to a Personnel Area and allows for further division of the personnel area (Ex. Regular FT, Regular PT, Temp PT &lt;.20)</td>
</tr>
<tr>
<td>Employee Group</td>
<td>Represents various types of employees in an organization (Staff, Faculty, Student, etc.)</td>
</tr>
<tr>
<td>Employee Subgroup</td>
<td>Assigned to an Employee Group and allows for Further division of the Employee Group (Exempt Monthly, Non-Exempt 37.5, Non-Exempt 40)</td>
</tr>
</tbody>
</table>

What is Organizational Management

- Organizational Management (OM)
  - Compensation creates and maintains the structure of the University
  - Integrates data between IRIS modules to provide defaults for employee master data
  - Links objects, establishes relationships and inheritance of attributes
Enterprise Structure

- The enterprise structure for Personnel Administration includes:

```
Client
Company Code
Personnel Area
Personnel Subarea
```

```
UK
UK00
Main Campus 1900
Steps 1100
Hospital 1500
Reg. FT 0001
Reg. PT – Faculty 0002
```

Personnel Structure

- Employees in the University are divided into two levels:
  - Employee Group (Staff)
  - Employee Subgroup (Non-Exempt 37.5)
- The basic function of the employee group includes:
  - Default values that are generated for the payroll accounting area and basic pay, etc.
  - A selection criteria for reporting.
Organizational Structure

- The organizational structure defines the relationship between three levels of objects:
  - Organizational units
    - Units, Colleges, Departments, etc.
  - Jobs
    - General job descriptors, following EEO standards, that are attached to a position
    - Staff Support Associate II, Administrative Assistant I, Program Coordinator, etc.
  - Positions
    - Defines work activities, requisite skills, and responsibilities of an employee
Object Manager – PPOSE

- PPOSE includes various ways to find information:
  - Organizational Unit
  - Job
  - Person

- Each method includes the ability to search by term or by structure

- In Production, you will be limited to your area of responsibility

Object Search

- You can search for an organizational unit, position or person directly in the Display section of the screen by using the Binoculars
Unit 1 Summary

• What is Organizational Management?
• Enterprise Structure
  • Personnel Area/Subarea
• Personnel Structure
  • Employee Group/Subgroup
• Organizational Structure
  • Organizational units/Jobs/Position
• Organization and Staffing
  • PPOSE
  • Position Funding

Unit 2

New/Existing Personnel
Unit 2– New/Existing Personnel

- HR Master Data
- Infotypes
- Validity Dates
- Accessing HR Master Data Infotypes
- Person ID and Personnel Assignment Number
- Display and Overview
  - Displaying Infotypes

Key Terminology

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Non–exempt</td>
<td>These employees are typically paid hourly and must submit a daily time sheet and receive overtime pay.</td>
</tr>
<tr>
<td>Exempt</td>
<td>These employees are typically salaried; they are exempt from submitting a daily time sheet and from overtime pay.</td>
</tr>
<tr>
<td>Personnel Action</td>
<td>A series of infotypes that sequentially display for data entry to complete an HR process</td>
</tr>
</tbody>
</table>
HR Master Data

The employee’s Department, Human Resources and Payroll are responsible for creating and maintaining employee’s HR Master Data Records.

HR master data records store vital information about the University’s employees, including information on their employment history and status, benefits, time management and payroll.

This information is organized into infotypes of related data.

Infotypes

- Infotypes are logical groupings of fields within screens to organize employee data:
  - Identified by a unique name and number
  - Data is created, displayed and changed on its own screen
  - Displays validity dates
    - Indicates when record took effect and when it ends
Validity Period

• HR Employee Master Data and its associated infotypes require a begin and an end date to identify a validity period—the time in which the employee or infotype is valid (active)

  * Generally, records are identified with an end date of 12/31/9999

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/30/1962</td>
<td>12/31/9999</td>
</tr>
</tbody>
</table>

Validity Dates and Delimit

Addresses Infotype (0006)
Permanent Address Record

The system delimits, or ends, the previous record the day before the new record takes effect.

initial address

1st address change

Date of hire 12/31/9999

new validity period
Infotypes and Records

- Addresses Infotype (0006)
  - Current address
  - 1st address change
  - Initial address

Display HR Master Data – PA20

- Use PA20 to display employee records
- Use Possible Entries to find the employee record
- Once the employee is found, click on the infotype you want to view, then on the Display icon
- Can display current records and historical records
- Can choose to view just one infotype or all that are available
Display HR Master Data – PA20

Accessing HR Master Data Infotypes
### Person ID & Personnel Assignment Number

<table>
<thead>
<tr>
<th>Person ID</th>
<th>Personnel Assignment Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>10916528</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Position Code</th>
<th>Personnel Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ivory N. Zimmerman</td>
<td>168 08</td>
<td>1083 Main Campus</td>
</tr>
</tbody>
</table>

### Display HR Master Data

<table>
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### Display and Overview

Then click Display or Overview

Select an Infotype

**Infotype: Personal Data (0002)**

- Add person to directory
- Current position
- Current Effective Date
- Current Period

**Infotype: Communication (0105)**

- Send message
- Contact information
Infotype 0000 – Actions

Hiring information for an employee, including:
- Validity dates
- Reason for hiring
- Employment status
- Position

- If more than one record, use the Next Record or Previous Record icons to view

Infotype 0002 – Personal Data

Personal information on an employee, including:
- Validity dates
- Name

- Social Security #
- Date of birth
- Gender
- Marital status
Infotype 0001 – Organizational Assignment

Organizational assignment information includes:

- Enterprise structure
  - Personnel Area
  - Personnel Subarea
  - Cost Center/Grant
- Personnel structure
  - Employee Group
  - Payroll Area
- Organizational structure
  - Percentage
  - Position
  - Job Key

Infotype 0006 – Addresses

Address information for an employee includes:

- Permanent residence
- Telephone number
- Communication #
- County of residence
- Mail Code
Infotype 0008 – Basic Pay

Payroll information for an employee, including:

• Payscale type
• Payscale area
• Payscale group
• Annual Salary
• Wage type
• Amount

• True Annual Salary

Infotype 0041 – Date Specifications

Date specification information for an employee including:

• Original hire
• Current hire
• Regular service
• Vacation service
• Separation

NOTE: If information is incorrect, contact Compensation to correct it
Infotype 0094 – Residence Status

Residence status information for an employee including:

- Residence status
- Work permit
- Issuing authority
- Expiration date
- I9 Signature date

Infotype 0077 – Additional Personal Data

Additional personal data information including:

- Ethnic origin
- Race Data
- Military status
- Veteran status
Infotype 0007 – Planned Working Time

Work time information for an employee, including:

- Validity dates
- Work schedule rule
- Time management status
- Working week schedule
- Daily working hours

Flexible Work Schedule Rules

- Versions of the fixed work schedule allow for a more varied work schedule outside the default set-up in the Planned Working Time Infotype (0007)
- Allows leave to be entered 7 days a week up to the appropriate number of hours for the employee as defined by the work schedule
- Flexible schedules accommodate 7.5, 8, 10, 12 and 24 hours per day, 7 days a week
Work Schedule Rules

- Period Work Schedule defines an employee’s hours and days worked for a period of time

- For example:
  - FIX1 = 8 h/d – 40 h/w – M–F
  - FIX2 = 7.5 h/d – 37.5 h/w – M–F
  - FLX1 = 8 h/d – 40 h/w – S–S
  - FLX2 = 7.5 h/d – 37.5 h/w – S–S
  - FLX3 = 10 h/d – 40 h/w – S–S
  - FLX4 = 12 h/d – 40 h/w – S–S
  - FLX6 = 24X7 flex

*Note:* Change only through an action in PA40.

Unit 2 – Exercise

Go to Exercise Guide

Exercise 2.1
Unit 2 Summary

- HR Master Data
- Infotypes
- Validity Dates
- Accessing HR Master Data Infotypes
- Person ID and Personnel Assignment Number
- Display and Overview
  - Displaying Infotypes

Unit 3

Maintaining Employee Data
Unit 3– Maintaining Employee Data

- Maintaining Employee Data
- Address/Name Changes
  - Creating Address/Name Changes
  - Changes to Incorrect Information
  - Create/Maintain Address Subtypes
- Additional Payments
- Recurring Payments/Deductions
- Concurrent Employment

Key Terminology

<table>
<thead>
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<tr>
<td>Delimit</td>
<td>A process to shorten the validity period of an object or infotype record by replacing its end date with an earlier date.</td>
</tr>
<tr>
<td>Additional Payment</td>
<td>Used to pay an employee a lump sum above his/her normal pay. May be used to pay the employee an award, a non–qualifying moving expense, etc.</td>
</tr>
<tr>
<td>Payroll Area</td>
<td>Shows whether the employee is paid Monthly, Biweekly, or Non–Pay.</td>
</tr>
</tbody>
</table>
Maintaining Employee Data

- An employee’s master data must be kept current
- Data may be maintained by Infotypes in two ways:
  - Single screen (PA30) – displays Infotypes relevant for a particular subject for one employee
  - Personnel actions (PA40) – presents all Infotypes in a logical sequence for one employee related to the action selected.
- Example of changes to be maintained include:
  - Address change (PA30)
  - Marital status (PA30)
  - Salary change (PA40)
  - Return From Leave with Pay (PA40)
Maintaining Employee Data

• When creating a new record, a system message, similar to the one below, may occur:

  ![Record valid from 11/27/2005 to 12/31/9999 delimited at end]

• Press Enter to move through the message and continue entering information.

• This message lets the user know that the old record is being delimited (ended)

Name and Address Changes – PA30

• Employee completes Address/Name Change form
• Department changes name in IRIS on Infotype 0002 – Personal Data
• Department changes address in IRIS on Infotype 0006 – Addresses
• Department sends Address/Name Change form to Human Resources and keeps a copy in departmental files
Address Changes - PA30

- Enter the Person ID or use the Possible Entries icon to find the employee's record and double-click on the name
- Press Enter to populate the employee's information
- Click on Addresses (0006)
  
  ![Addresses (0006)](image)
  
- Click on Create or Copy
- Choose Permanent Residence
  
  ![Permanent Residence](image)
  
- Enter the Start date
  - The date the new address takes effect
- Enter the new address
- **Save the record**

Changes to Incorrect Information - PA30

- If information was entered into the system incorrectly during a PA30 new record or a PA40 action, the corrections may be made by using PA30, selecting the infotype, then clicking on the Change icon

  ![Change icon](image)

  Remember that using the change icon does not keep a historical record.

  - Example: an address was entered as 373 Della Dr., and it should have been 733 Della Dr.
Go to Exercise Guide

Exercise 3.1
and
Exercise 3.2

Create/Change Address Subtypes – PA30

• Provides the capability to record multiple types of addresses for employees
• Users who maintain employee data will use this transaction
• Address include:
  • Permanent Residence (created in new hire process)
  • Primary Emergency Contact
  • Secondary Emergency Contact
  • Legal Guardian
  • Mailing Address
  • Work Address
  • Power of Attorney
  • Forwarding Address
Create/Change Address Subtypes – PA30

Select the Addresses (0006) Infotype, then click either the Create or the Copy icon.

Next, double-click on the type of address to be created or changed.

Create/Change Address Subtypes – PA30

Enter the address and telephone information as needed.

If the address subtype is for a contact person, enter his/her name in the C/O field.

Save your entry.
Create Additional Payments – PA30

• Infotype 0015 Additional Payments is used to create, change, or delete an additional payment for an employee
• The type of additional payments will be determined by the type of employee
• It is a one-time payment
  • Only happens in the pay period associated with the date of origin on the infotype record
• Examples:
  • Make the Difference Award
  • Lump Sum Payment
  • Additional Retirement Wage
  • Non Qualified Moving Expense
Create Additional Payments (0015)

• Maintain HR Master Data
  • Enter the Person ID or use the Possible Entries icon to find the employee’s record and double-click on the name

  ![Person ID: 18881774]

  • Press Enter to populate the employee’s information

  • In the Direct Selection Infotype field, type 0015

  ![Direct selection
  Infotype: 0015]

  • Press Enter
  • Click on the Create icon

Create Additional Payments – PA30

Enter the Wage type, Amount, Number / unit (if needed), and Date of Origin
Create Additional Payments – PA30

If the cost distribution is different from what is established on the position or on the employee’s record, click on the Maintain Cost Assignment icon. Enter the Cost Center, WBS Element, or Internal Order which is being charged, then click on the Transfer button.

Save the record

Run ZHR_PAR to create the PAR to send to Compensation.

Payroll Authorization Record – ZHR_PAR

- Use ZHR_PAR to print and save the PAR (Personnel Authorization Record)
- Obtain an authorized signature and attach any other necessary documentation
- Forward 2 copies to Compensation
Creating the PAR – ZHR_PAR

Use transaction code ZHR_PAR (remember to use /n or /o as needed)

- Enter the date the data was entered against the employee
- Enter the Personnel Number of the employee
- Click on the Execute icon

Printing the PAR

Make sure Print Immediately is checked

To print click the Print icon

To view or save the PAR, click the Print Preview icon

Number of copies = 2
Saving the PAR

- Select GoTo ➔ List Display

- Select System ➔ List ➔ Save ➔ Local File

- Select Unconverted and click Continue icon

Saving the PAR (2)

- Click the Possible Entries icon

- Click Desktop

- Name file (*.txt) and Save

- Click Generate
Go to Exercise Guide

Exercise 3.4
and
Exercise 3.5

Create Recurring Payments/Deductions – PA30

- Use Infotype 0014 Recurring Payments/Deductions
  - To create recurring payments that are in addition to an employee’s base pay amount
  - To create recurring deductions
    - Only Payroll and Benefits may create/maintain the deductions
- Once created, these payments/deductions continue until the end (or “to”) date is reached
- Recurring payment information will be entered by those authorized department users or business officers who are responsible for maintaining the employee information
Create Recurring Payments/Deductions (0014)

- Maintain HR Master Data
  - Enter the Person ID or use the Possible Entries icon to find the employee's record and double-click on the name
    
    ![Person ID](Person ID 1881774)

  - Press Enter to populate the employee's information

- In the Direct Selection Infotype field, type 0014

  ![Direct selection](Direct selection Infotype 0014)

  - Press Enter
  - Click on the Create icon

Create Recurring Payments/Deductions – PA30

Enter Start date and, if known, the To date

![Start](Start 4/1/06 to 6/30/06)

Enter the Wage type, Amount, Number/unit (if needed), and Reason for Change (if applicable)
Create Recurring Payments/Deductions – PA30

If the cost distribution is different from what is established on the position or on the employee’s record, click on the Maintain Cost Assignment icon.

Enter the Cost Center, WBS Element, or Internal Order which is being charged, then click on the Transfer button.

Save the record.

Run ZHR_PAR to create the PAR to send to Compensation.

Create the PAR

- Print 2 copies of the PAR
- Obtain authorization signatures
- Attach any necessary documentation
- Forward to Compensation
Unit 3 – Exercise

Go to Exercise Guide

Exercise 3.6

Concurrent Employment

• The Concurrent Employment solution provides full functionality to process employees who have multiple assignments
  • Reduces manual tasks and administration
  • The employee’s data is managed in the same IRIS system for all personnel assignments
• Every employee must have a main assignment; it is set up automatically for new hires
• If the employee only has one assignment, it is the Main; if more than one assignment, departments work together to determine which assignment is main.
• **All** changes of Main are handled by the Benefits office
Main vs Additional

- All assignments must be created within the same Payroll Area as the Main assignment, either Monthly or Biweekly
- Main should be chosen by the following criteria:
  - If one assignment has benefits, it should be Main
  - If one assignment is a student fellowship, the non-fellowship should be Main
  - If one assignment is FT faculty and in FES, it should be Main
  - Otherwise, Main should be the assignment in which the employee works the most hours
  - If not sure, contact Human Resources

Unit 3 Summary

- Maintaining Employee Data
- Address/Name Changes
  - Creating Address/Name Changes
  - Changes to Incorrect Information
  - Create/Maintain Address Subtypes
- Additional Payments
- Recurring Payments/Deductions
- Concurrent Employment
Unit 4– Funding & Cost Distribution

- Position Funding
  - Account Assignments
  - Cost Distributions
- Employee Funding
  - Displaying Cost Distribution
  - Creating Cost Distribution
Position Funding

- Position Funding
  - Can come from 3 sources:
    - Cost Centers
    - WBS Elements (grants)
    - Internal Orders (PPD accounts)
  - Can be viewed using PPOSE
  - Can be overridden either in:
    - Time Management via the Cost Allocation profile
    - PA30 – Infotype 0027 Cost Distribution

Position Account Assignments – PPOSE

- Controlling Area
- Personnel Area and Subarea
- Position Funding Account
Position Cost Distributions – PPOSE

Employee Funding

• At times, it is necessary to charge the payroll for a specific period to an account or accounts other than the default accounts established on the position
  • Employees who are being paid from Grants/WBS Elements
    ▪ Regular or temporary staff in research
    ▪ Graduate students
  • Employees whose cost distribution varies from the cost distribution established on the position

• Cost Distribution for the employee may be created and maintained using Infotype 0027 in PA30

• Do not override position funding for faculty handled in the Faculty Effort System (FES)
Displaying Cost Distribution (0027)

Use PA20 to display cost distribution

Enter the Person ID of the employee

Person ID: Enter the ID

Press Enter to populate the fields

In the Direct Selection Infotype field, type 0027

Direct selection
Infotype: 0027

Click on the Overview icon

Displaying Cost Distribution (0027)

Validity Dates for each distribution

Individual distribution records
Displaying Cost Distribution (0027)

Click to select a record to view

Click on the Detail icon

The details contain all distributions during these validity dates
Create Cost Distribution (0027)

• 100% of the funding must be made
• Example:
  • Part of Gregory’s pay will be covered by a new grant
  • The Cost Distribution must include 25% from the grant AND 75% from the default account.

Entering Cost Distribution (0027)

Go to T-code PA30

Enter the Person ID of the employee

Press Enter to populate the fields

In the Direct Selection Infotype field, type 0027

Click on either the Create icon or Copy icon
Create Cost Distribution (0027)

Enter the validity dates in the Start and To fields

Start: 05/01/2006  To: 05/31/2006

Select 01 Wage and Salary

Important...press the Enter key before proceeding
Create Cost Distribution (0027)

- Enter the
  - Company Code (UK00),
  - cost object and,
  - percentage of distribution

<table>
<thead>
<tr>
<th>Co...</th>
<th>Cost...</th>
<th>Order</th>
<th>WBS element</th>
<th>Name</th>
<th>Pct.</th>
<th>Name of a</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK00</td>
<td>02528883</td>
<td></td>
<td></td>
<td>AG SOILS SURVEYS</td>
<td>75.50</td>
<td></td>
</tr>
<tr>
<td>UK00</td>
<td>3351111111</td>
<td></td>
<td></td>
<td>THE STUDY OF DEV..</td>
<td>25.50</td>
<td></td>
</tr>
</tbody>
</table>

Be sure the cost distribution covers 100% of the employee's pay.

The system will warn you if you are over 100%.

The system will NOT warn you if you are under 100%.

Click the Save icon.

Ensuring Accuracy

- Always double-check the records to ensure accuracy
- Check for:
  - 100% funding for the given validity dates
  - Any date gaps – are the gaps to be covered by regular funding cost objects?
Unit 4 – Exercises

Go to Exercise Guide

Exercise 4.1
and
Exercise 4.2

Exercise 4.3 (optional)

Unit 4 Summary

• Position Funding
  • Account Assignments
  • Cost Distributions
• Employee Funding
  • Displaying Cost Distribution
  • Creating Cost Distribution
Course Summary

• Know terms and concepts associated with Personnel Administration as it relates to UK
• You are now able to:
  • Display master data records
  • Identify changes for new & existing personnel
  • Make changes to existing personnel records
  • Add new data records for existing personnel
  • Add cost distribution

Course Assessment

• Logout of the Training Client
• Delete the PARs on the Desktop
• Log into the Training Sandbox via the Web Portal (myUK)
• Write your real name and real UserID on the assessment
• Enter the name of the employee you are using for the assessment where indicated on page 2