



Personnel Administration 300



Personnel Administration HR_PA_300



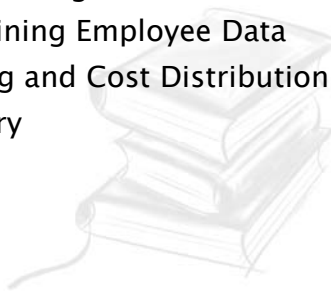
IRIS
Integrated Resource
Information System

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



Personnel Administration 300

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



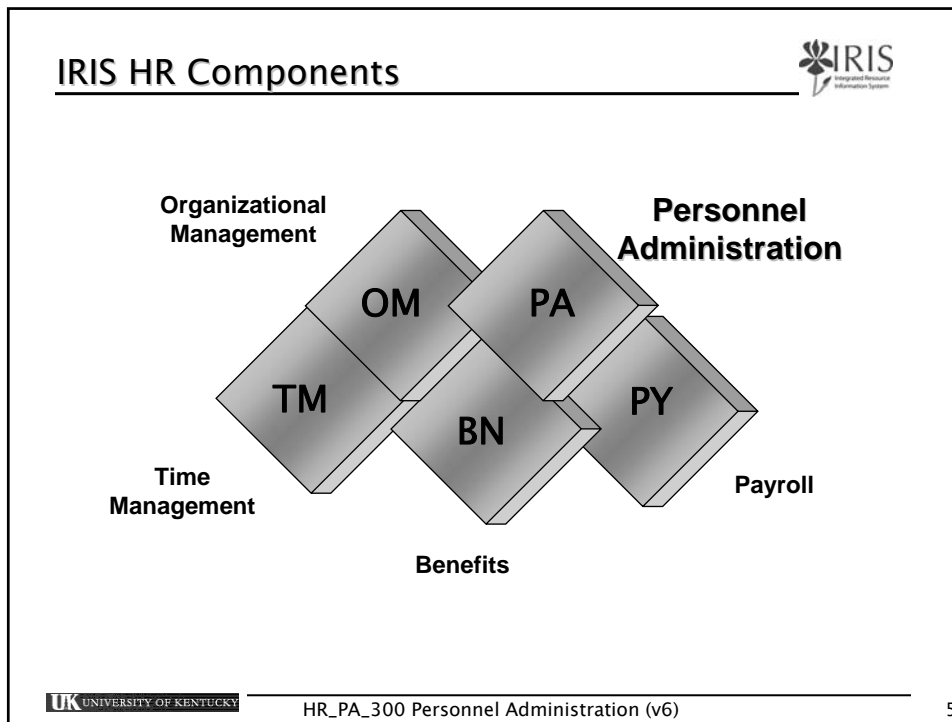
Prerequisites and Roles



- Prerequisites
 - ♦ UK_100 SAP Awareness and Navigation
 - ♦ HR_200 Human Resources Overview
- Roles
 - ♦ Business Officers
 - ♦ Personnel Administrators



Personnel Administration 300



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

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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

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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



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

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Key Terminology



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

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

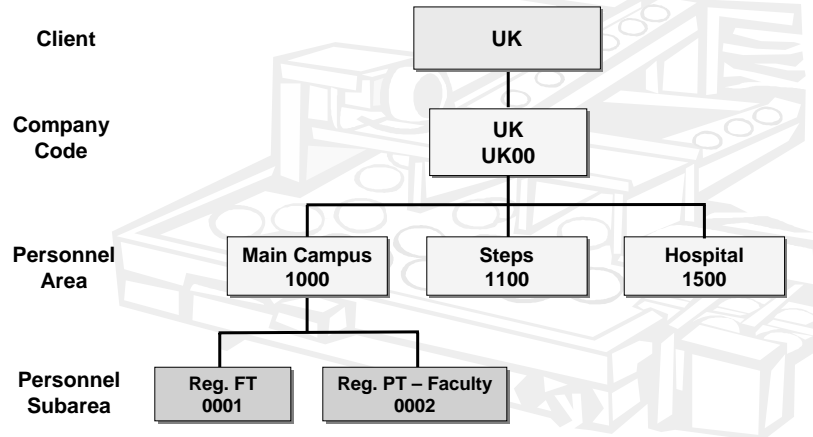


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Enterprise Structure



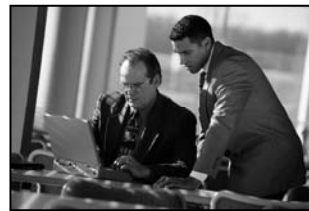
- The enterprise structure for Personnel Administration includes:



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.



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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

Organization and Staffing – PPOSE



Click to select fields

Searches

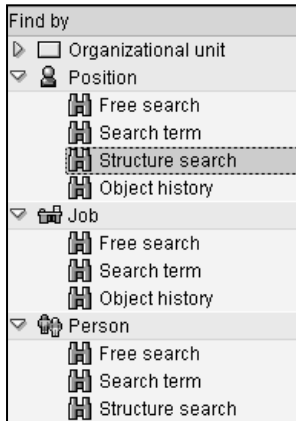
Search Results

Objects and Related Objects

Object Details

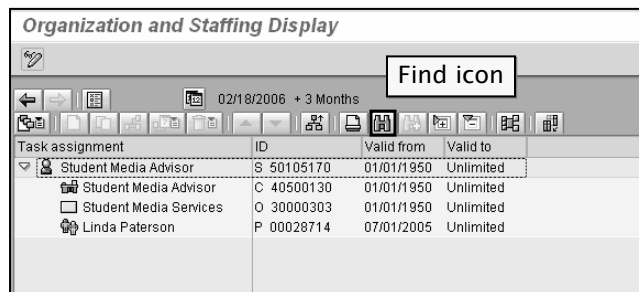
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Object Manager – PPOSE



- 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

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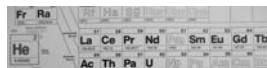
Unit 1 Summary



- 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

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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



Terminology	Definition
Non-exempt	These employees are typically paid hourly and must submit a daily time sheet and receive overtime pay.
Exempt	These employees are typically salaried; they are exempt from submitting a daily time sheet and from overtime pay
Personnel Action	A series of infotypes that sequentially display for data entry to complete an HR process

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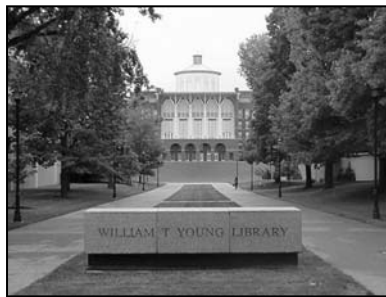
HR Master Data



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



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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**

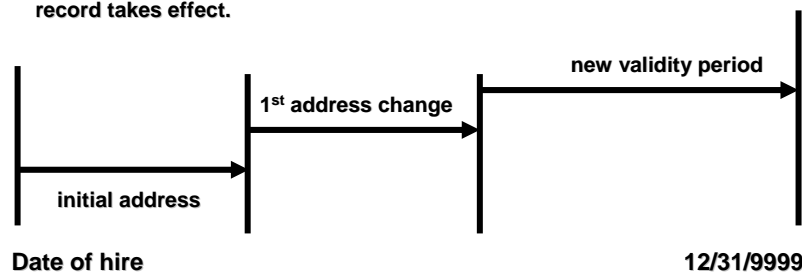
From	11/30/1962	To	12/31/9999
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Validity Dates and Delimit



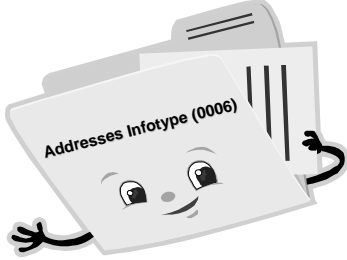

Addresses Infotype (0006) Permanent Address Record

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



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Infotypes and Records



Current address


1st address change

Initial address

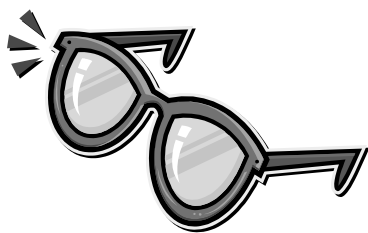


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Display HR Master Data – PA20



- 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



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Display HR Master Data - PA20



Object Manager

Employee Master Data

Accessing HR Master Data Infotypes



Tabs

Infotype List

Direct Menu

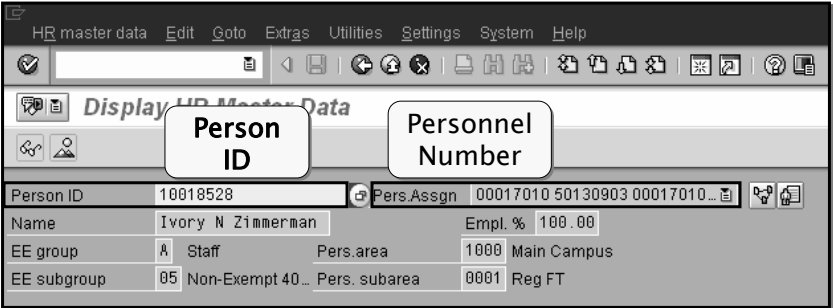
Tab List

Period Selection

Subtype

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Person ID & Personnel Assignment Number



HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

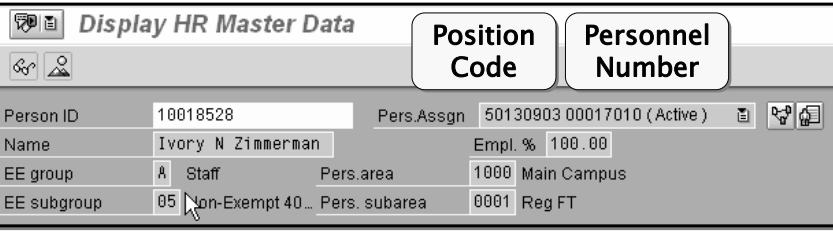
Person ID: 10018528 Pers.Assgn: 00017010 50130903 00017010...

Name: Ivory N Zimmerman Empl. %: 100.00

EE group: A Staff Pers.area: 1000 Main Campus

EE subgroup: 05 Non-Exempt 40... Pers. subarea: 0001 Reg FT

Position Code & Personnel Number



Display HR Master Data

Person ID: 10018528 Pers.Assgn: 50130903 00017010 (Active)

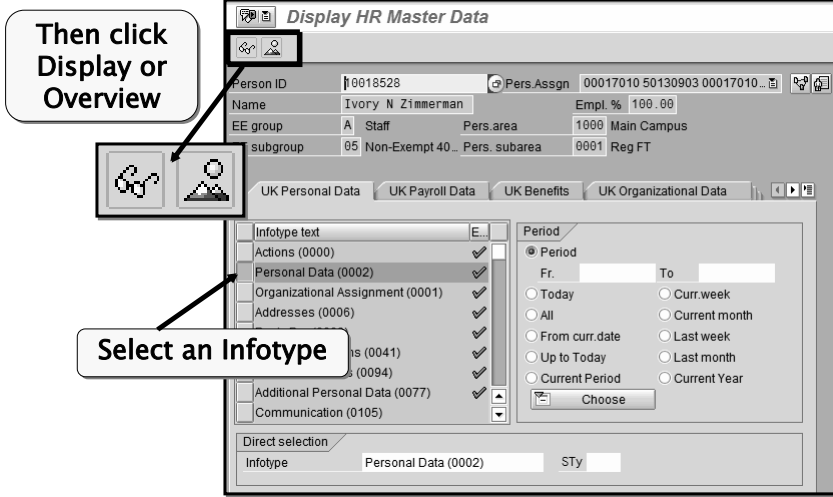
Name: Ivory N Zimmerman Empl. %: 100.00

EE group: A Staff Pers.area: 1000 Main Campus

EE subgroup: 05 Non-Exempt 40... Pers. subarea: 0001 Reg FT

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Display and Overview



Display HR Master Data

Person ID: 10018528 Pers.Assgn: 00017010 50130903 00017010...

Name: Ivory N Zimmerman Empl. %: 100.00

EE group: A Staff Pers.area: 1000 Main Campus

subgroup: 05 Non-Exempt 40... Pers. subarea: 0001 Reg FT

UK Personal Data UK Payroll Data UK Benefits UK Organizational Data

Then click Display or Overview

Select an Infotype

Infotype text E...

Actions (0000)

Personal Data (0002)

Organizational Assignment (0001)

Addresses (0006)

... (0041)

... (0094)

Additional Personal Data (0077)

Communication (0105)

Period

Fr. To

Today Curr. week

All Current month

From curr. date Last week

Up to Today Last month

Current Period Current Year

Choose

Direct selection

Infotype: Personal Data (0002) STy

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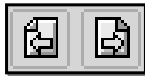
Infotype 0000 – Actions



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



Display Actions (0000)

Person ID: 10001760 Pers. Assgn: 00000238 50130737 00000238 ...

Pers. No.: 238

Name: Kenneth L. Brown Empl. %: 100.00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0003 Reg PT >.74

Start: 12/21/2005 to 12/31/9999 Chng: 12/01/2005 MISSY

Personnel action

Action Type: ZM Return From Leave with Pay

Reason for Action: 01 Return to Work

Status

Customer-specific: []

Employment: 3 Active []

Special payment: []

Organizational assignment

Position: 50130737 Staff Support Associate I

Personnel area: 1000 Main Campus

Employee group: A Staff

Employee subgroup: 06 Non-Exempt 37.5 hour

Additional actions

Start Date	Act.	Action type	ActR	Reason for act.
12/21/2005	ZM	Return From Leave with Pay	01	Return to Work

Infotype 0002 – Personal Data



Personal information on an employee, including:

- Validity dates
- Name
- Social Security #
- Date of birth
- Gender
- Marital status

Person ID: 10001760 Pers. Assgn: 00000238 50130737 00000238 ...

Name: Kenneth L. Brown Empl. %: 100.00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0003 Reg PT >.74

Start: 01/04/1973 To: 12/31/9999 Chng: 12/28/2005 BHMCG12

Name

Title: [] Name format: 00

Last name: Brown

First name: Kenneth

Middle name: L.

Suffix: []

Known As: []

Name: Kenneth L. Brown

HR data

SSN: 555-01-8732

Birth date: 01/04/1973

Gender: Female Male

Mar. Status: 0 Sing... []

HIC Number: []

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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

Display Organizational Assignment (0001)

Org Structure

Person ID: 10001760 Pers.Assgn: 00000238 50130737 00000238 Empl. %: 100.00
 Name: Kenneth L. Brown
 EE group: A Staff Pers. area: 1000 Main Campus
 EE subgroup: 06 Non-Exempt 37.5 Pers. subarea: 0003 Reg PT > 74
 Start: 12/01/2005 to 12/31/9999 Chng: 01/23/2006 MISSY

Enterprise structure
 CoCode: UK00 University of Kentucky
 Pers. area: 1000 Main Campus Subarea: 0003 Reg PT > 74
 Cost Ctr: 1012005020 CIS JOURNALISM Bus. Area: 0101 UK w/o component units
 Grant: GNR Fund: 0011020100 PROVOST UK GE
 Func. Area: 0110

Personnel structure
 EE group: A Staff Payr. area: B1 BI-weekly
 EE subgroup: 06 Non-Exempt 37.5 hour Contract: 40 Office & Cleric

Organizational plan
 Percentage: 100.00
 Position: 50130737 C0049M8 Staff Support Associat.
 Job key: 40501107 C0049M8 Staff Support Associat.
 Exempt: N
 Org. Unit: 30000509 SM100 School Of Journalism.
 Org. key: 10001012005020

Administrator
 PersAdmin
 Time
 PayAdmin

Infotype 0006 – Addresses



Address information for an employee includes:

- Permanent residence
- Telephone number
- Communication #
- County of residence
- Mail Code

Display Addresses (0006)

Person ID: 10001760 Pers.Assgn: 00000238 50130737 00000238 Empl. %: 100.00
 Name: Kenneth L. Brown
 EE group: A Staff Pers. area: 1000 Main Campus
 EE subgroup: 06 Non-Exempt 37.5 Pers. subarea: 0003 Reg PT > 74
 Start: 01/01/2005 to 12/31/9999 Chng: 12/01/2005 MISSY

Address
 Address type: 1 Permanent residence
 Address line 1: 6587 Crosby Dr.
 City/county: Lexington
 State/zip code: KY Kentucky 40517
 Country Key: US United States
 Telephone number: 859 245-9851

Communications
 Type: Number: 0 Extension:
 Type: Number: 0 Extension:
 Type: Number: 0 Extension:
 Type: Number: 0 Extension:

Additional fields
 County: 034 Fayette
 Mail code (org unit): 30000509 Computer Science

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Infotype 0008 – Basic Pay



Payroll information for an employee, including:

- Payscale type
- Payscale area
- Payscale group
- Annual Salary
- Wage type
- Amount
- True Annual Salary

Display Basic Pay (0008)

Person ID: 10001760 Pers. Assign: 00000238 50130737 00000238

Name: Kenneth L. Brown Empl. %: 100.00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0001 Reg. IT

Start: 11/27/2005 to 12/31/9999 Chgd: 01/31/2006 BHMCO12

Subtype: 0 Basic contract

Salary

PS type: 02 Hourly Capacity util. level: 100.00

PS area: 01 Main Campus Work hours/period: 75.00 Bi-weekly

PS group: 30 Level: 01 Annual salary: 19,500.00 USD

Wa.	Wage Type	Long Text	O.	Amount	Curr.	L.	A.	Number/Unit	Unit
1005	Hourly Rate			10.00	USD			0.00	

TV: 11/14/2006 to 12/31/9999 10.00 USD

Additional fields

True Annual Salary: 19,500.00 Override Salary: 0.00

Infotype 0041 – Date Specifications



Date specification information for an employee including:

- Original hire
- Current hire
- Regular service
- Vacation service
- Separation

Display Date Specifications (0041)

Person ID: 10001760 Pers. Assign: 00000238 50130737 00000238

Name: Kenneth L. Brown Empl. %: 100.00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0003 Reg. PT > 74

Start: 01/01/2005 to 12/31/9999 Chgd: 12/01/2005 MISSY

Date Specifications (0041)

Date type	Date	Date type	Date
01 Original Hire Date	01/01/2005	02 Current Hire Date	01/01/2005
03 Reg Service Date	01/01/2005	05 Vacation Svc Date	01/01/2005
07 Separation Date	12/31/9999		

NOTE: If information is incorrect, contact Compensation to correct it

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Infotype 0094 – Residence Status



Residence status information for an employee including:

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

Display Residence Status (0094)

Person ID: 10001760 Pers. Assgn: 00000238 50130737 00000238... R2

Name: Kenneth L. Brown Empl. %: 100.00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0001 Reg FT

Start: 01/01/2005 to: 12/31/9999 Changed on: 11/14/2006 MISSY

Personal identification

Residence status: C HR-Citizen

ID type: []

Issuing Authority: []

ID number: []

Issuing date: []

Expiry date: []

Employment verification

Work Permit: []

Issuing Authority: []

Work permit number: []

Issuing date: []

Expiry of WP: []

Additional fields

I9 Signature Date: 12/22/2004

Infotype 0077 – Additional Personal Data



Additional personal data information including:

- Ethnic origin
- Race Data
- Military status
- Veteran status

Display Additional Personal Data (0077)

Person ID: 10001760 Pers. Assgn: 00000238 50130737 00000238... R2

Name: Kenneth L. Brown Empl. %: 100.00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0001 Reg FT

Start: 01/01/2005 To: 12/31/9999 Chg.: 12/01/2005 MISSY

Additional Personal Data

Ethnic origin: 06 White/Not Hispanic origin

Race Data

Race Category

Military status: 00

Veteran Status

Special disabled veteran

Vietnam-era veteran

Other veteran

Newly separated veteran

Non-veteran

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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

Display Planned Working Time (0007)

Work schedule

Person ID: 10001760 Pers. Assgn: 00000000

Name: Kenneth L. Brown Emp: 00.00

EE group: A Staff Pers. area: Main Campus

EE subgroup: 06 Non-Exempt 37 Pers. subarea: 2003 Reg PT > 74

Start: 12/01/2005 To: 12/31/9999 Chg.: 12/01/2005 MISSY

Work schedule rule

Work schedule rule: FI2C 7.5 h/d 37.5 h/w M-F

Time Mgmt status: 11 - Time evaluation of actual times

Working week: 01 Working Week Sunday - Saturday

Part-time employee

Working time

Employment percent	100.00
Daily working hours	7.50
Weekly working hours	37.50
Monthly working hrs	162.50
Annual working hours	1950.00
Weekly workdays	5.00

Work Schedule Rule

Full-time Equivalence (FTE)

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



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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



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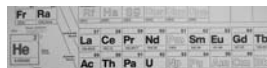
Unit 2 Summary



- 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

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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



Terminology	Definition
Delimit	A process to shorten the validity period of an object or infotype record by replacing its end date with an earlier date
Additional Payment	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.
Payroll Area	Shows whether the employee is paid Monthly, Biweekly, or Non-Pay.

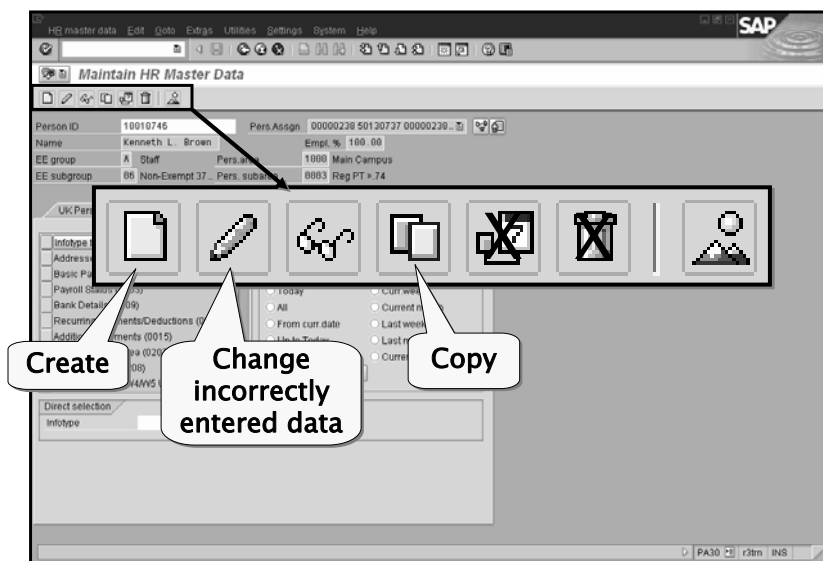
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Maintaining Employee Data



- 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)

Maintain HR Master Data – PA30



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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 messages 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





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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)

- Click on Create  or Copy 
- Choose Permanent Residence

- 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



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.



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Unit 3 – Exercises



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

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Create/Change Address Subtypes - PA30



UK Personal Data UK Payroll Data

- Infotype text
- Actions (0000) ✓
- Personal Data (0002) ✓
- Organizational Assignment (0001) ✓
- Addresses (0006) ✓

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

STyp	Name
1	Permanent residence
10	Primary Emergency Contact
11	Secondary Emergency Contact
12	Legal Guardian
5	Mailing address
7	Work Address
8	Power of Attorney
9	Forwarding Address

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

Person ID: 10001692 Pers Assgn: 00000162 50106231 00000162...

Name: John Hancock Empl. %: 100.00

EE group: A Staff Pers. area: 1000 Main Campus

EE subgroup: 03 Exempt Monthly Pers. subarea: 0001 Reg FT

Start: 10/03/2005 to 12/31/9999

Address

Address type: 10 Primary Emergency Contact

c/o: Martha Hancock

Address line 1: 8745 Tates Creek Rd

Address line 2:

City/county: Lexington

State/zip code: KY Kentucky 40517

Country Key: US United States

Telephone number: 859 272-5437

Communications

Type	CELL	Number	859 603-9841	Extension	
Type	Number			Extension	
Type	Number			Extension	
Type	Number			Extension	

Personnel Administration 300

Unit 3 – Exercise – Optional



Go to Exercise Guide

Exercise 3.3 – Optional



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

Personnel Administration 300

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	18001774	
-----------	----------	--

- ♦ 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




Additional Payments (0015)	
Wage type	2240 Make the Difference Award
Amount	500.00 USD
Number/unit	
Date of origin	11/09/2005
Default Date	
Assignment number	
Reason for Change	

Enter the Wage type, Amount, Number / unit (if needed), and Date of Origin

Personnel Administration 300

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

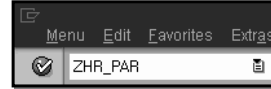
Action Information:		Employee Information:	
Personnel Number:	0000000	10001774	0000000
Period:	01-01-2006 - 12-31-9999	Location:	4000
Type:	Main Campus Create Assignment	Payroll:	0000
Reason:	Staff Hire	SSN:	000-00-0000
EE Status:	Active	Ethnic Origin:	White/Not Hispanic origin
Form Assignment:	0000000	Residence Status:	UK-Citizen
Position:	0000000	Base Pay:	
Job:	0000000	Payroll Code:	W1 Monthly
Origin:	0000000	FTE:	100.00
FLSA Indicator:	Y	Grade:	00
EE Group:	Staff	Range Type Amount:	1,000.00
EE Subgroup:	Exempt Monthly	Annual Salary:	36,000.00
Personnel Area:	Main Campus	True Annual Salary:	36,000.00
Personnel Subarea:	Reg PT		
Recurring/Additional Payments		Data:	
Name the Difference Award:	000.00 (0010)	End of Continuation:	
		Vacation Begin Date:	
		Original Hire Date:	01-01-2006
		Current Hire Date:	01-01-2006
		Regular Service Date:	01-01-2006
		Vacation Service Date:	01-01-2006
Comments from Selection Screen:			
This is comment line #1			
This is comment line #2			
This is comment line #3			
Signature: _____			
Printed by: JDE@UKY			


Personnel Administration 300

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 

Program ZHR_NEWPAR

Reporting Period: K Key Date 10/06/2006

Selection Criteria: Personnel Number 228

Comments: Make the Difference Award

Printing the PAR



OutputDevice: LP01 Local Default Printer

Frontend Printer: IRIS Cafe

Page selection

Spool Request: Name SMART LP01 DELUCIA

Spool Control: Print immediately

Number of Copies: Number 2

Print retention pd: 8 Day(s)

Storage Mode: 1 Print only

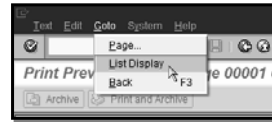
Print Print preview

Personnel Administration 300

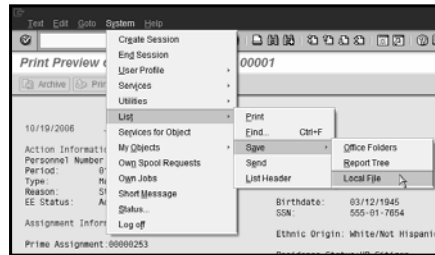
Saving the PAR



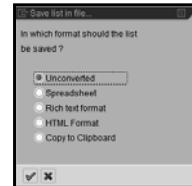
• Select GoTo → List Display



• Select System → List → Save → Local File



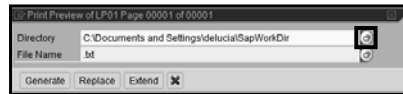
• Select Unconverted and click Continue icon



Saving the PAR (2)

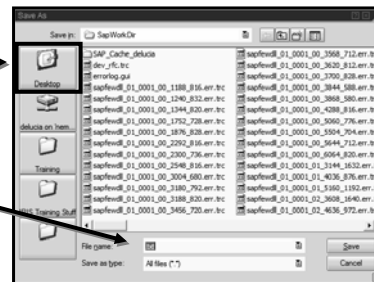


• Click the Possible Entries icon

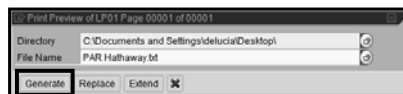


• Click Desktop

• Name file (*.txt) and Save



• Click Generate



Personnel Administration 300

Unit 3 – Exercises



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

Personnel Administration 300

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	10001774	
-----------	----------	--

- ♦ Press Enter to populate the employee's information
- ♦ In the Direct Selection Infotype field, type 0014

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	4/01/06	to	6/30/06
-------	---------	----	---------

Enter the Wage type, Amount, Number/unit (if needed), and Reason for Change (if applicable)

Recurring Payments/Deductions (0014)	
Wage type	2130 Merit Incentive
Amount	500.00 USD
Number/unit	
Assignment number	
Reason for Change	

Personnel Administration 300

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

Print Preview of LP01 Page 00001 of 00001

10/19/2006 Jane Hathaway - 10001774

Action Information:		Employee Information:	
Personal Number:	00003253	1232 Beverly Ct.	
Period:	01/01/2005 - 12/31/2008	Lexington KY 40504	
Type:	Main Campus Create Assignment	SSA Payroll	
Reason:	Staff Hire		
EE Status:	Active	Birthdate:	03/12/1945
Assignment Information:		SSN:	100-01-1014
Position:	00002070	Ethnic Origin:	White/Not Hispanic origin
Job:	40001730	Residence Status:	HR-Citizen
Orgline:	00000002	Base Pay:	
FLSA Indicator:	Y	Payroll Area:	W1 Monthly
EE Group:	Staff	FTE:	100.00
EE Subgroup:	Exempt Monthly	Grade:	SS
Personal Area:	Main Campus	Wage Type Amount:	3,300.00
Personal Subarea:	Reg PT	Annual Salary:	39,600.00
		True Annual Salary:	39,600.00
Recurring/Additional Payments		Dates:	
Additional Acting Pay:	1,000.00 (0014)	Date of Organization:	
Make the Difference Award:	500.00 (0015)	Vacation Begin Date:	
		Original Hire Date:	01/01/2005
		Current Hire Date:	01/01/2005
		Regular Service Date:	01/01/2005
		Vacation Service Date:	01/01/2005
Comments from Selection Screen:			
This is comment line #1			
This is comment line #1			
This is comment line #2			
Signature: _____			

Personnel Administration 300

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

Personnel Administration 300

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



Personnel Administration 300

Unit 4



Funding and Cost Distribution

Unit 4– Funding & Cost Distribution



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

Personnel Administration 300

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



Position Funding Account

Controlling Area

Personnel Area and Subarea

Details for Position Staff Support Associate I

Basic data | Account Assignment | Address | Cost distribution | Work schedule | ADT

Valid from 01/01/1950
To 12/31/9999

Account assignment	
Controlling Area	UK00 University of Kentucky
Master cost center	1012004760 ED INST MEDIA CENTER
Business Area	
Company Code	
Personnel area	1000 Main Campus
Pers. subarea	0001 Reg FT

Personnel Administration 300

Position Cost Distributions – PPOSE



Details for Position Staff Support Associate I

Basic data Account Assignment Address Cost distribution Work schedule ADT

Master Cost Center

Valid from 01/01/2005
To 12/31/9999

Master cost center 1012004760 ED INST MEDIA CENTER

COAr	Cost ctr	Order	WBS element	Name	Pct	Name of
UK00	1012004760			ED INST MEDIA CENTER	100.00	

Entry 1 / 1

Cost Objects

Cost Distribution Percentage

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)

Personnel Administration 300

Displaying Cost Distribution (0027)



Use PA20 to display cost distribution

Enter the Person ID of the employee

Person ID

Press Enter to populate the fields

In the Direct Selection Infotype field, type 0027

Direct selection
Infotype

Click on the Overview icon



Displaying Cost Distribution (0027)



Validity Dates
for each
distribution

Person ID Pers.Assgn 00001666 50106987 00001666...

Name Empl. % 100.00

EE group Pers.area 1000 Main Campus

EE subgroup Exempt Monthly Pers. subarea 0001 Reg FT

Choose To STy.

Dist.	Name	Valid From	End Date	Co...	Bu...	Cost Center	CCTR text	Prcnt	L
01	Wage/salary	12/01/2006	03/31/2007	UK000101	1012047180	APPLIED ENE...		25.00	
01	Wage/salary	09/01/2006	10/15/2006	UK000101	1012047180	APPLIED ENE...		50.00	
01	Wage/salary	05/01/2006	08/30/2006	UK000101	1012047180	APPLIED ENE...		75.00	

Individual distribution records

Personnel Administration 300

Displaying Cost Distribution (0027)



Overview Cost Distribution (0027)

Person ID: 10003184 Pers. Assgn: 00001666 50106987 00001666...
 Name: Gregory K Emmet Empl. %: 100.00
 EE group: A Staff Pers. area: 1000 Main Campus
 EE subgroup: 03 Exempt Monthly Pers. subarea: 0001 Reg FT
 Choose: 01/01/1800 To: 12/31/9999 STy: .

Dist.	Name	Valid From	End Date	Co...	Bu...	Cost Center	Cctr text	Prcnt	L
01	Wage/salary	12/01/2006	03/31/2007	UK000101		1012047180	APPLIED ENE...	25.00	
01	Wage/salary	09/01/2006	10/15/2006	UK000101		1012047180	APPLIED ENE...	50.00	
01	Wage/salary	05/01/2006	08/30/2006	UK000101		1012047180	APPLIED ENE...	75.00	

Click to select a record to view

Click on the Detail icon

Displaying Cost Distribution (0027)



Display Cost Distribution (0027)

Org. Management info

Person ID: 10003184 Pers. Assgn: 00001666 50106987 00001666...
 Name: Gregory K Emmet Empl. %: 100.00
 EE group: A Staff Pers. area: 1000 Main Campus
 EE subgroup: 03 Exempt Monthly Pers. subarea: 0001 Reg FT
 Start: 12/01/2006 To: 03/31/2007 Chng: 03/09/2006 MISSY

Distrib: 01 Wage/salary
 Master cost center: 1012047180 APPLIED ENERGY RES.

Co...	Cost ctr	Order	WBS element	Name	Pct.	Name of a
UK00	1012047180			APPLIED ENERGY RES.	25.00	
UK00			3051111111	THE STUDY OF DEVEL...	75.00	

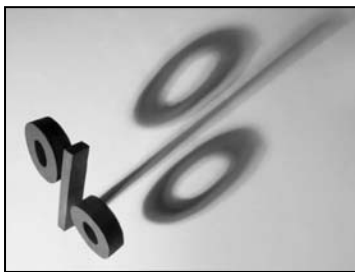
The details contain all distributions during these validity dates

Personnel Administration 300

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

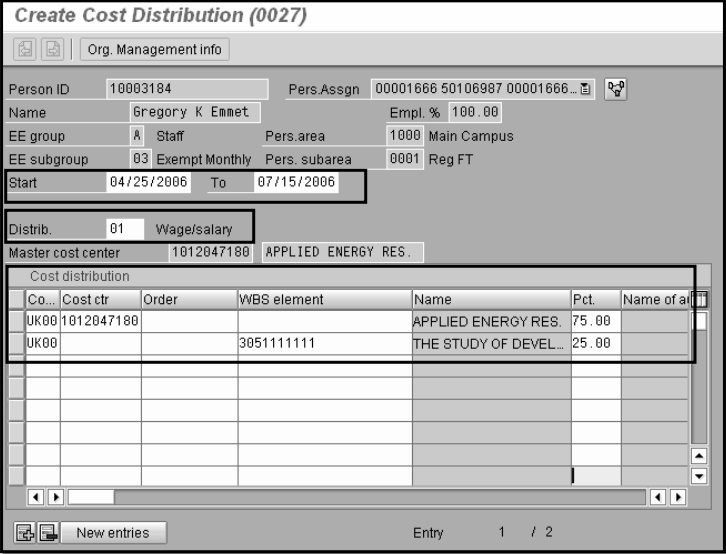


or Copy icon



Personnel Administration 300

Create Cost Distribution (0027)



IRIS Integrated Resource Information System

Org. Management info

Person ID: 10003184 Pers.Assgn: 00001666 50106987 00001666 ...

Name: Gregory K Emmet Empl. %: 100.00

EE group: A Staff Pers.area: 1000 Main Campus

EE subgroup: 03 Exempt Monthly Pers.subarea: 0001 Reg FT

Start: 04/25/2006 To: 07/15/2006

Distrib.: 01 Wage/salary

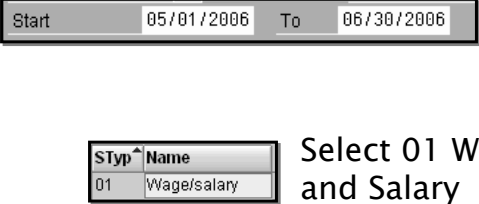
Master cost center: 1012047180 APPLIED ENERGY RES.

Co...	Cost ctr	Order	WBS element	Name	Pct.	Name of al
UK00	1012047180			APPLIED ENERGY RES.	75.00	
UK00			3051111111	THE STUDY OF DEVEL...	25.00	

New entries Entry 1 / 2

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Create Cost Distribution (0027)



IRIS Integrated Resource Information System

Enter the validity dates in the Start and To fields

Start: 05/01/2006 To: 06/30/2006

Styp: 01 Wage/salary Select 01 Wage and Salary

Important...press the Enter key before proceeding

UK UNIVERSITY OF KENTUCKY HR_PA_300 Personnel Administration (v6) 92

Personnel Administration 300

Create Cost Distribution (0027)



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

Cost distribution						
Co...	Cost ctr	Order	WBS element	Name	Pct.	Name of ai
UK00	012520660			AG SOILS SURVEYS	75.00	
UK00			3051111111	THE STUDY OF DEVEL...	25.00	

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?

Personnel Administration 300

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



Personnel Administration 300

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



Use the Person ID Possible Entries icon to find the employee's name & position number	Person ID <input type="text"/>
Press Enter to populate the employee information	Enter Name Here