HRMS End User Training

HRMS Organizational Management Level 1 Training Guide

HR
State of Washington

Table of Contents

Course Objectives……3

Section 1: Organizational Overview……9

Section 2: Organizational Units……37

Section 2a: Create Organizational Unit……43

Section 2b: Maintain Organizational Unit……56

Section 2c: Delimit Organizational Unit……64

Section 3: Positions……75

Section 3a: Create Position Action……83

Section 3b: Maintain Positions……110

Section 3c: Delimit Positions……116

Section 4: Organizational Management Reports……124

Complete Position Description (S_AHR_61016511)……129

Display Structure (PPSS)……134

Structure Display / Maintenance (S_AHR_61016528)……138

Organizational Management Transactions Reports (ZHR_RPTOMN01)……142

IT1018 Position Cost Distribution (ZHR_RPTFI0027)……145

Washington Management Services Employee Report (ZHR_RPTPA802)……152

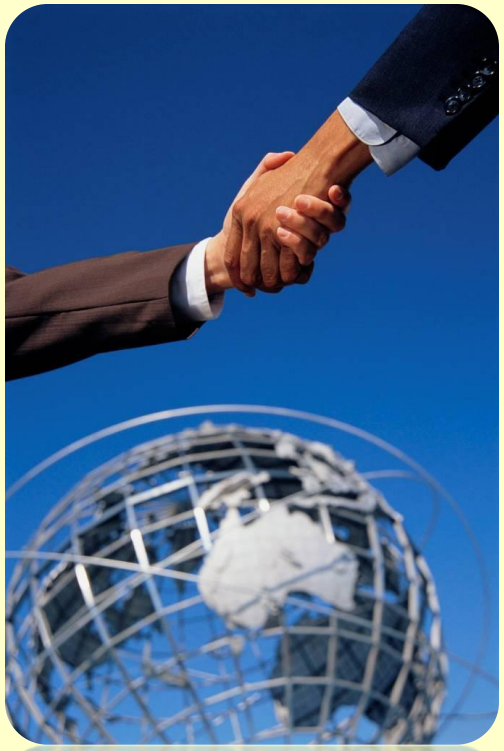
Other Organizational Management Reports (Business Intelligence)……157

Helpful Hints……163

Other Available Reports……167

Introduction

- Name
- Agency
- Agency Role
- Goal for class



Course Objectives

Upon completion of this course, you will be able to:

- Describe an overview of organizational management
- Explain the basic organizational management concepts and terms
- Perform the organizational unit and position exercises outlined in the Activity Guide
- Explain the organizational management integration with Personnel Administration
- Prepare organizational management reports

Training Materials and Tools

The following training materials and tools are used:

- **HRMS Training Guide**: Designed to introduce you to basic HRMS navigation terms and concepts and to provide the necessary information to complete the activities and exercises throughout the course.
- **HRMS Activity Guide:** Designed to provide you with activities and exercises that help solidify your understanding of concepts learned in the course and also provide you with an opportunity to use HRMS.
  - Activities include Demonstrations, Walkthroughs and Exercises.

Job Aids

The following job aids are available to you and are applicable to Organizational Management:

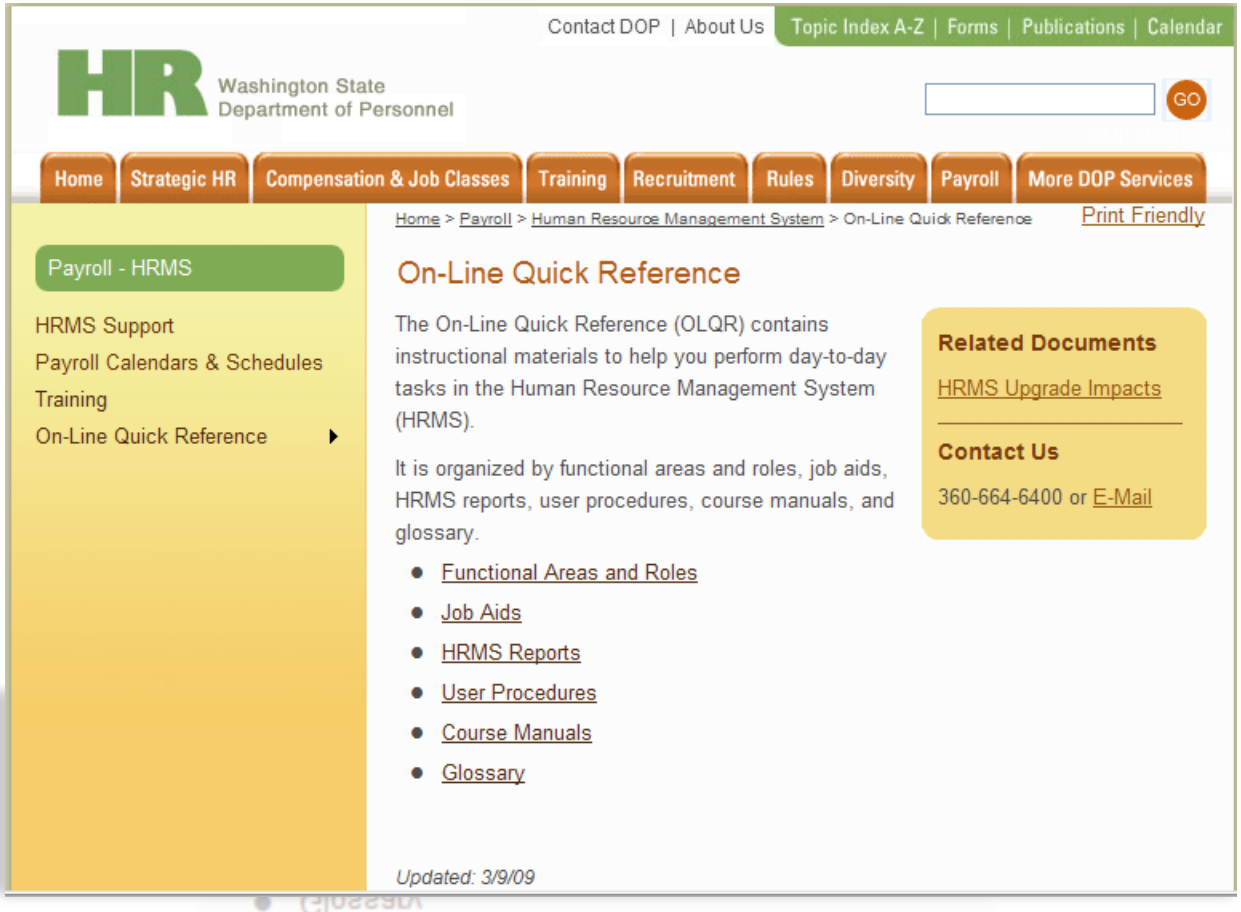
- **Organizational Management**
- **HRMS Basic Navigation**
- **General Reporting**
- **Accessing HRMS**
- **Financial Reporting**

website address: http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference

On-line Quick Reference

OLQR is an acronym for the On-line Quick Reference tool.

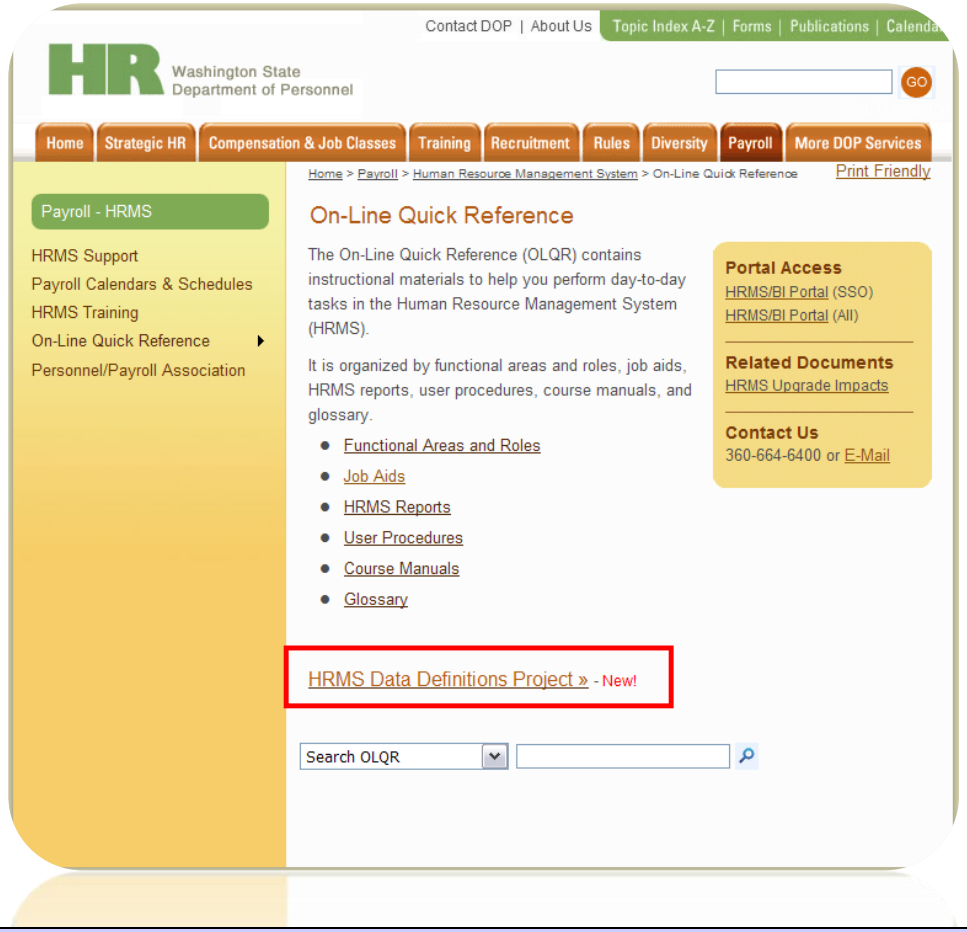
It contains a glossary, job aids, system and user procedures that describe how to perform HRMS tasks step-by-step.



website address: http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference

HRMS Data Definitions

HRMS Data Definitions website provides agencies with standard definitions of HRMS fields names and dropdown list options.



website address:
http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/HRMSDataDefinitions.aspx

HRMS Support

The **HRMS Support** website is a point of contact for internal and external clients of DOP's Information systems, websites and internal networks.

website address: http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference

Section 1: Organizational Management Overview

Organizational Management Overview

Upon completion of this section, you will be able to:

- Define the organizational management concepts and key terms
- List and explain the organizational management roles
- Discuss the integration of Organizational Management with other HRMS components.
- Explain the overall process of Organizational Management.

Key Terms

Organizational Management	Process used to create and maintain organizational structures and their associated org. units, positions, and jobs in HRMS.
Organizational Structure	Made up of organizational units, positions, jobs, people, and cost centers and how they relate to each other to form a hierarchical structure.
Business Area	A specific agency in the State of Washington
Personnel Area	A specific agency/sub-agency in the State of Washington.

Key Terms – cont'd

Personnel Sub-area	A subdivision of Personnel Area that identifies Bargaining Units, WMS, Exempt and Non-Represented positions.
Employee Group	Status of an employee or position within the State of Washington.
Employee Sub-group	A sub-division of Employee Group which defines work period designation and salary rate unit.

Key Terms – cont'd

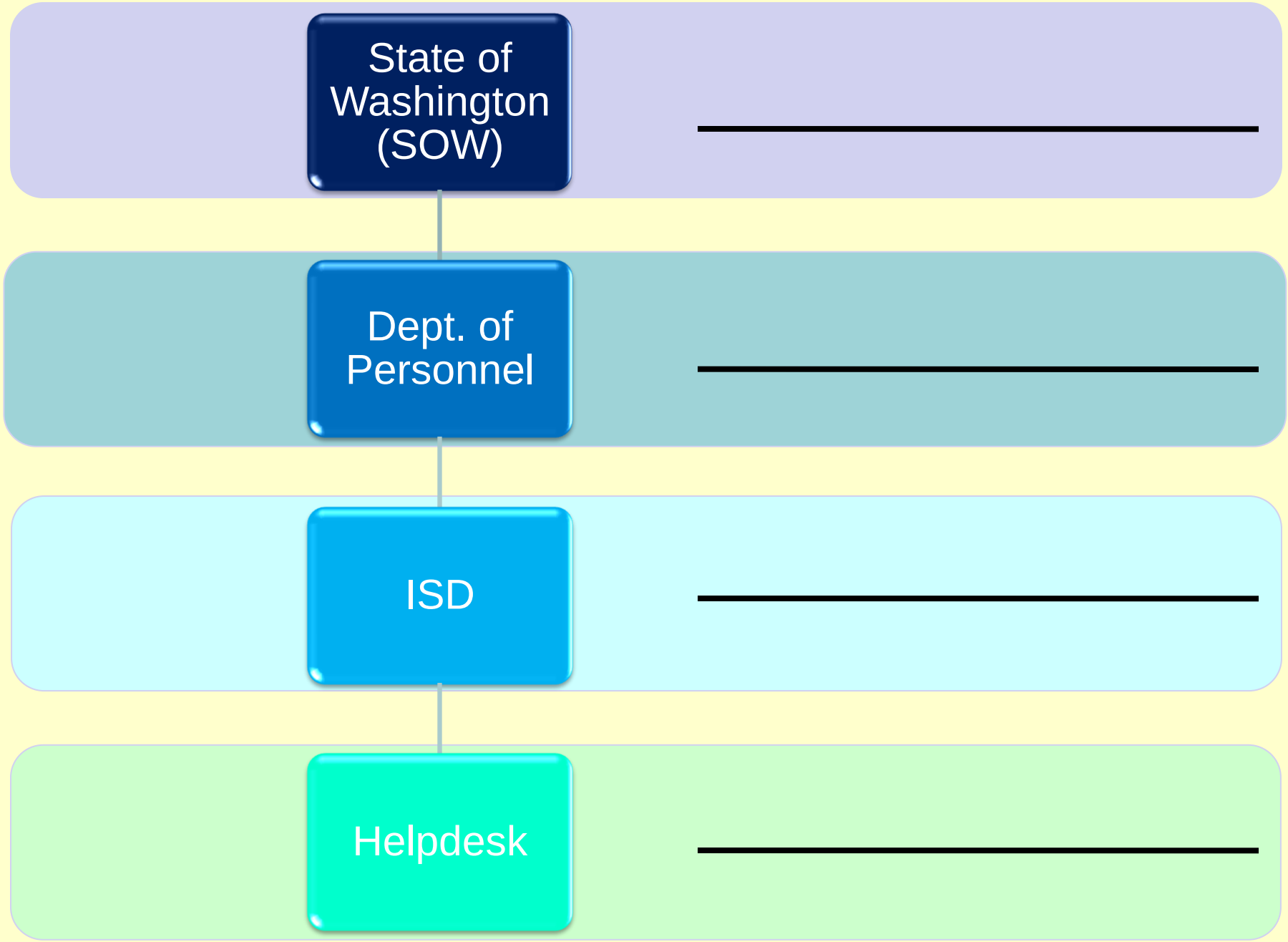
Organizational Unit	Represents departments, regions, divisions, units or other groupings within an agency.
Organizational Relationships	Describes how organizational management objects are related to each other.
Attributes	Information that defines the org unit, position or job.

Key Terms – cont'd

Object	An individual element of information which exists in HRMS. • Examples are: org units, jobs, positions, cost centers
Cost Center	An object in HRMS that represents a defined location of cost incurrence. • Example – Organizational Index

Organizational Security Levels

- Organizational Security Levels identify the highest level org unit an end user can access to view, create, and/or modify employee data.
- There are three Security levels in HRMS.
  - 1st Level Statewide Access
    - Allows an end user to view information for all agencies and employees. Most central service agencies, such as DRS, HCA, and OFM, have statewide access.
  - 2nd Level Agency Access
    - Allows an end user to view information for a specific Personnel Area. This is the default and most common for State agencies.
  - 3rd Level Org Unit Access
    - The most restrictive. It allows an agency to restrict end user access to a single org unit within the Personnel Area and any org units below it. It must report directly to the top org unit.
  - **Important: Agencies adding or deleting 3rd level Org Units must coordinate with DOP to ensure Security Access Profiles are updated.**


State of Washington (SOW)
Dept. of Personnel
ISD
Helpdesk

HRMS Roles

- HRMS has role-based security
- System security dictates the information that you can update
- Your agency assigned your role based on what tasks you perform
- There are agency-level and centralized roles

Organizational Management Roles

- **Organizational Management Processor** (Decentralized)
  - Creates and maintains the organizational structure, org units and positions within an agency.
- **Organizational Management Inquirer**
  - Views organizational information as it is entered in HRMS.
- **Compensation Analyst** (Centralized)
  - Creates and maintains jobs.
  - Establishes new Personnel Areas in HRMS.

Integration With Other HRMS Components

- HRMS is a very integrated system, with the ability to share data with other HRMS components.
- It allows real-time access from Organizational Management data to:
  - Personnel Administration
  - Payroll
  - Compensation and Benefits
  - Time Management

Integration With Other HRMS Components – cont'd

- When a position is created in HRMS, many attributes are inherited by an employee when appointed to the position.
  - Employees are compensated based on the job they hold.
- Reports can be generated based on an agency's organizational structure.

Benefits of HRMS

- Improved data integrity
  - Default values are based on business rules
  - Defined values can be setup as a list for users and agencies to choose from
- Agencies can view a “snapshot” of their organization at any point in time
  - Identify vacant or filled positions
- Agencies have a complete model of the organization and reporting structure in one place

Enterprise Structure and Personnel Structure

- DOP creates the

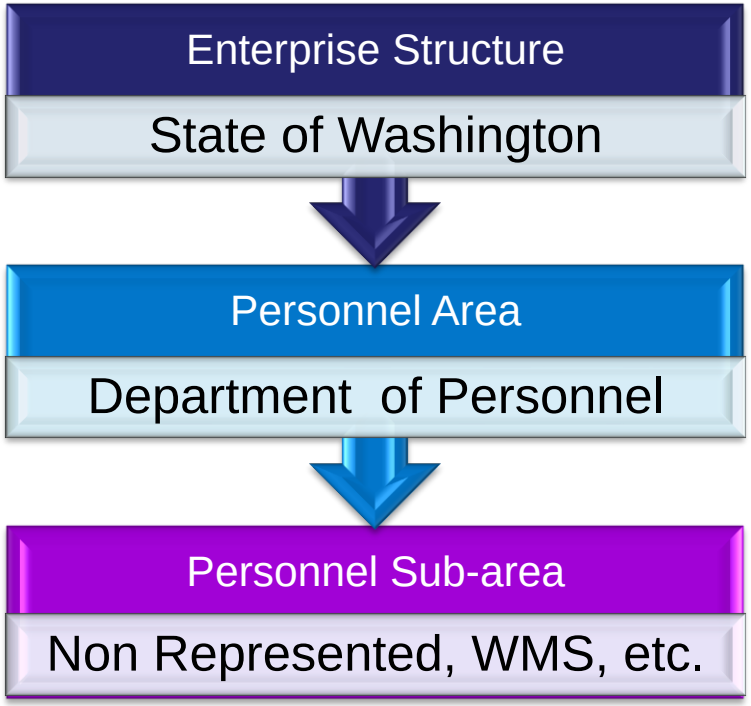
  _____ and

  _____.

  – These two structures must be set up to create the Organizational Structure.

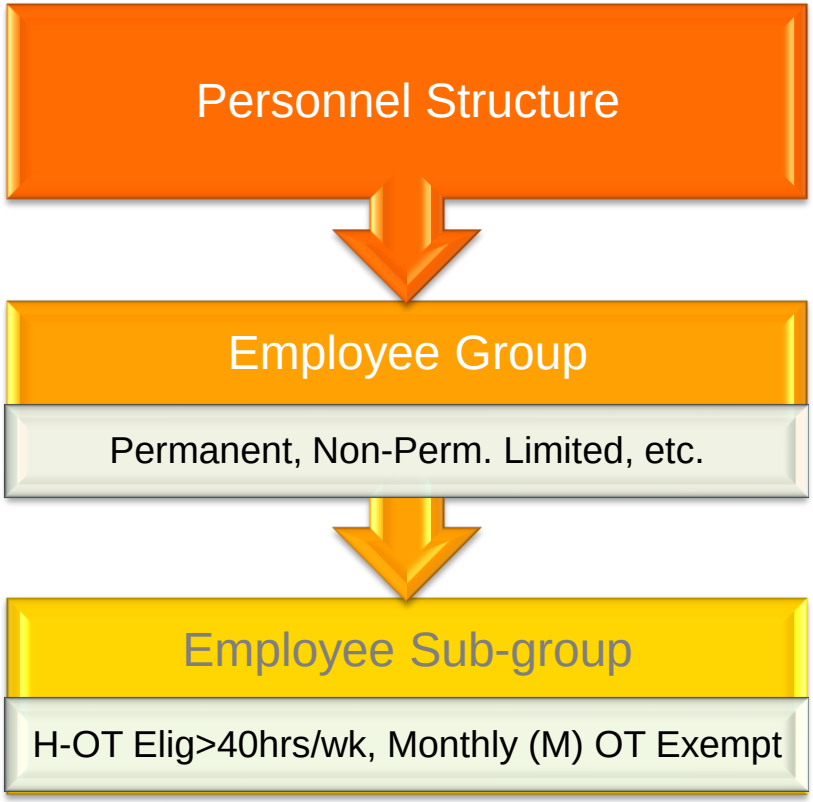
Enterprise Structure

- The Enterprise Structure consists of the Personnel Area and Personnel Sub-Area.
  - Personnel Area is:
    - a specific agency/sub-agency in the State of Washington.
  - Personnel Sub-Area:
    - identifies Bargaining Units, WMS, Exempt and Non-represented positions.



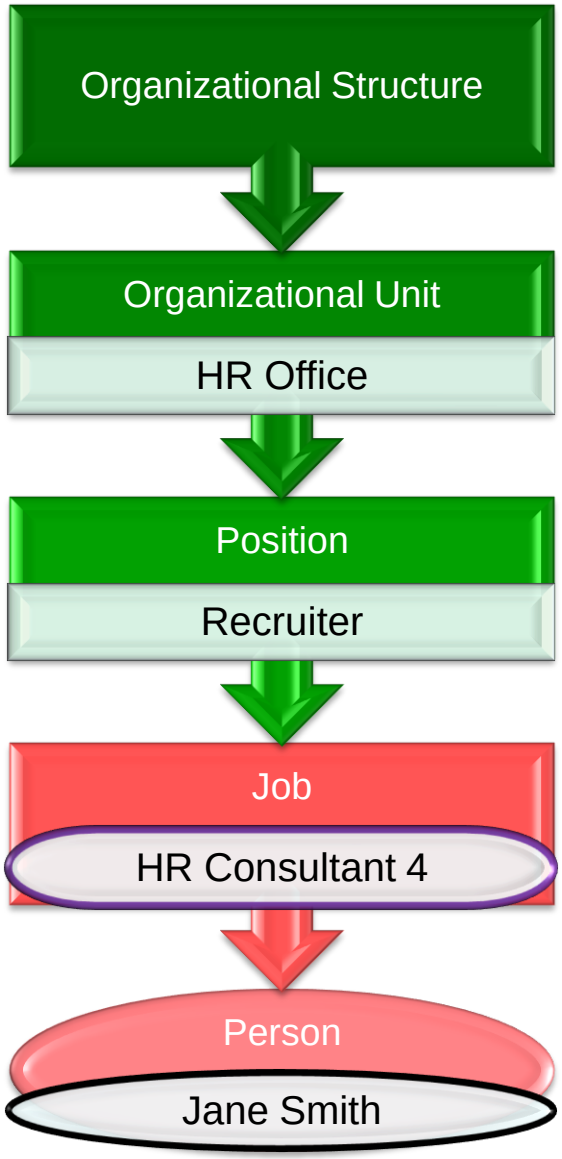
Personnel Structure

- The Personnel Structure consist of the Employee Group and Employee Sub-Group.
  - Employee Group is:
    - status of an employee or position within the State of Washington.
  - Employee Sub-Group is:
    - a sub-division of Employee Group which defines work period designation and salary rate unit.

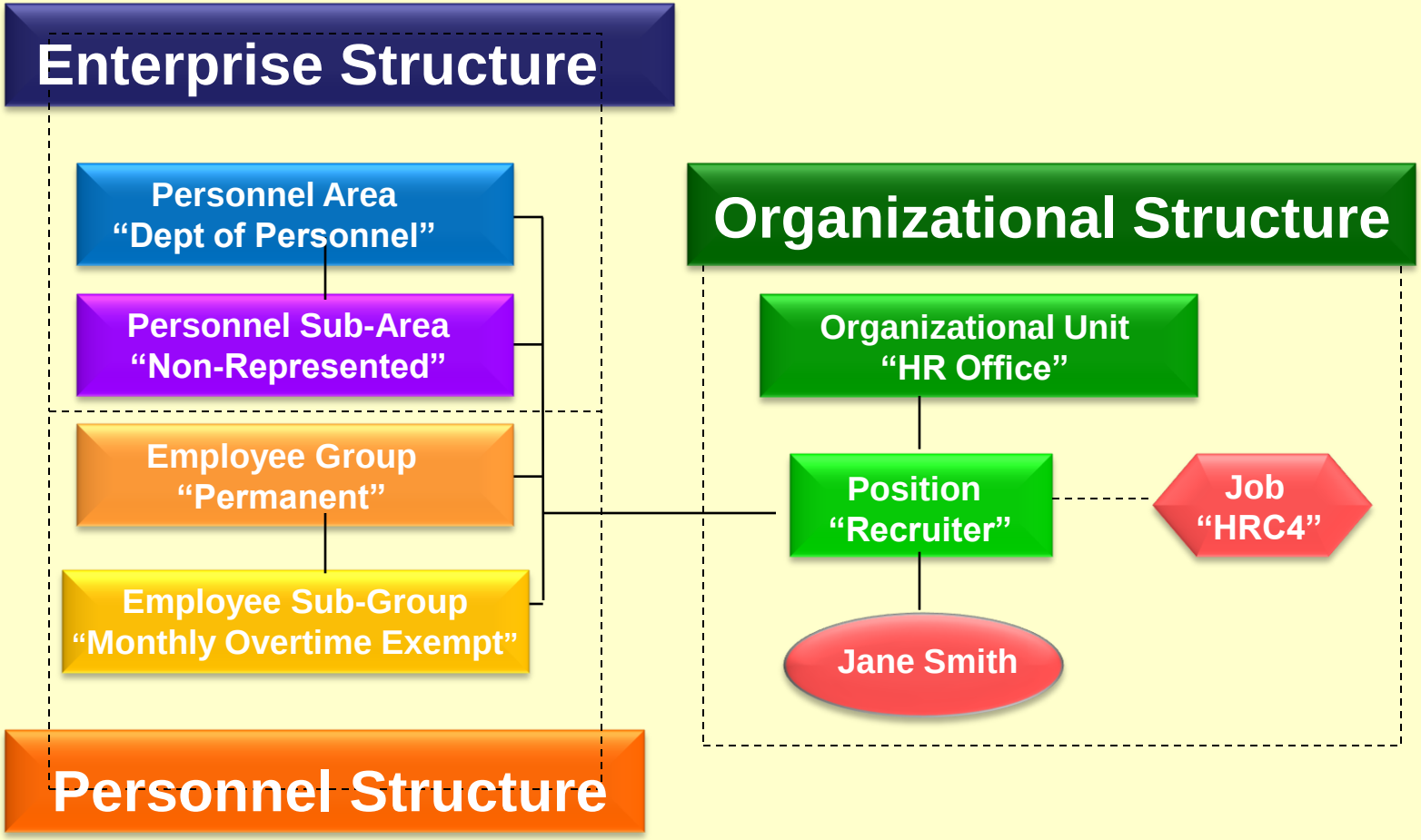


Organizational Structure

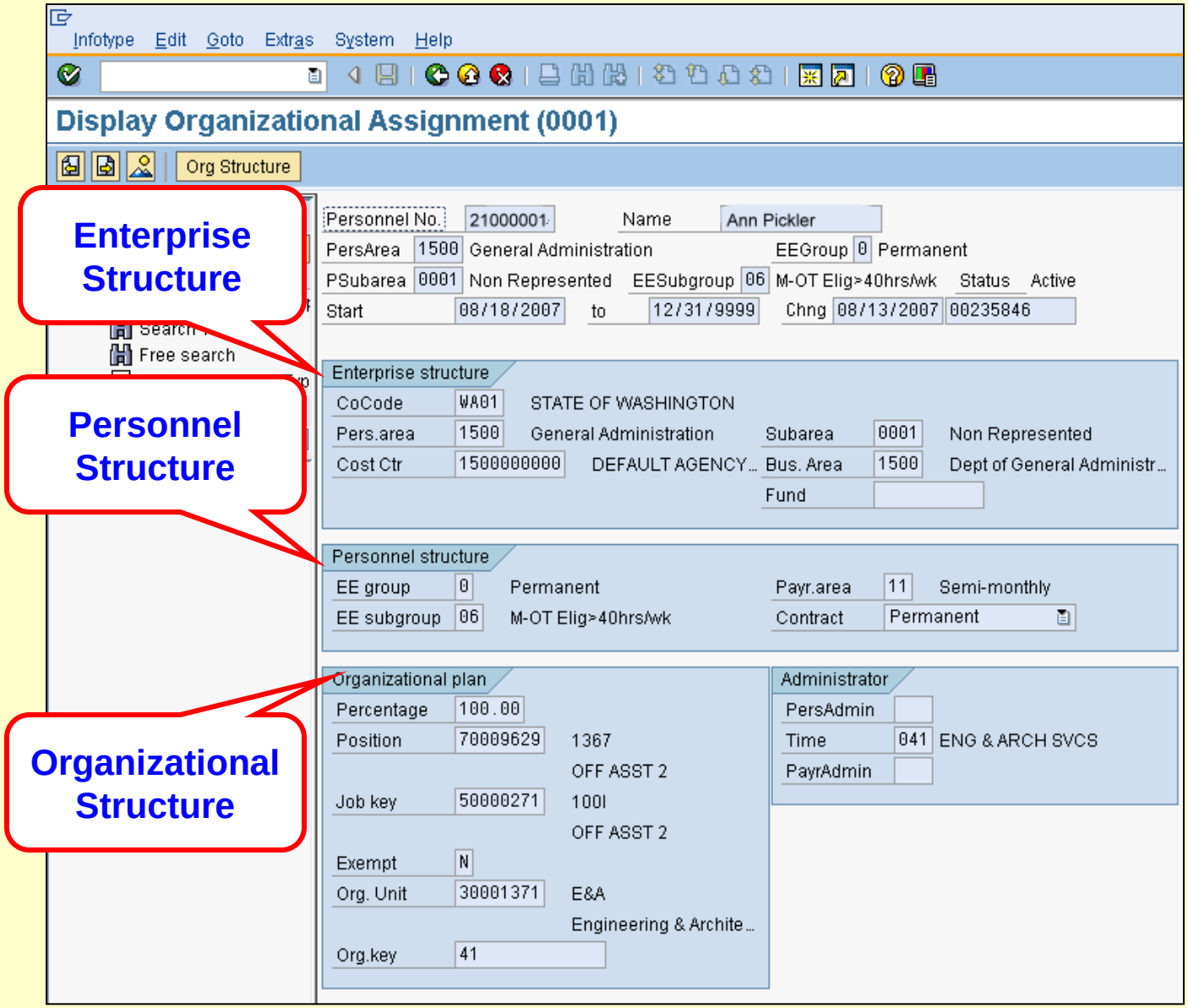
- Organizational Structure is made up of Organizational Units, Positions, Jobs, People, and Cost Centers.
  - Organizational Unit:
    - represents the departments, regions, divisions, units etc. within an Agency.
  - Job is:
    - generic in nature; contains attributes used to create specific positions when drafting an organizational plan.
  - Position is:
    - a specific and concrete description of the responsibilities that one individual fulfills in an organization.



HRMS Structure Overview



HRMS Structure Overview – cont'd



WSD Personnel

Organizational Management Concepts

- Objects
  - An individual element of information which exists in HRMS

  Example:

- Relationships
  - This describes how two objects are linked together, such as a reporting relationship

  Example:

- Characteristics/Attributes
  - Information that defines the org unit, position or job

  Example:

Organizational Objects

1. Organizational Management is based on organizational objects.
2. Each object is designated a letter in HRMS:
   - **S** _____
   - **P** _____
   - **O** _____
   - **C** _____
   - **K** _____

Organizational Objects

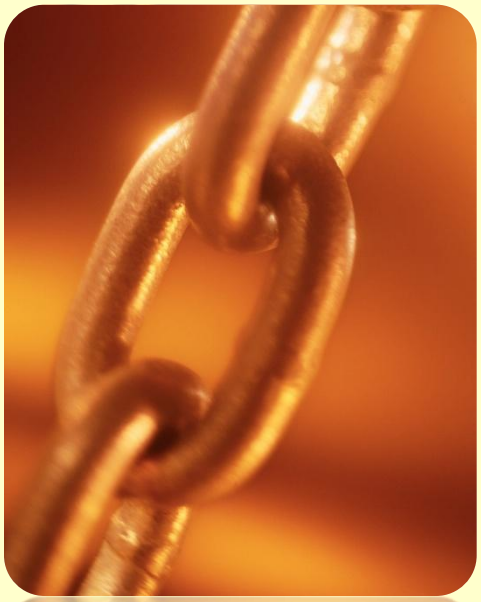
- Position (**S**) – A group of duties and responsibilities to be performed by an employee. An object related specification tied to an Organizational Unit.
- Person (**P**) – An individual in an organization.
- Organizational Unit (**O**) - Represents the departments, regions, divisions, units etc. within an Agency
  - Relationships between organizational units are used to determine the hierarchy within the organizational structure.

Organizational Objects

- Job (**C**) - General task of similar purpose and knowledge requirements. Also referenced as the job classification.
  - Jobs can be related to positions and during hiring exceptions to people.
    - Exceptions include In-training and Under-fills.
- Cost Center (**K**) - An object in HRMS that represents a defined location of cost incurrence.

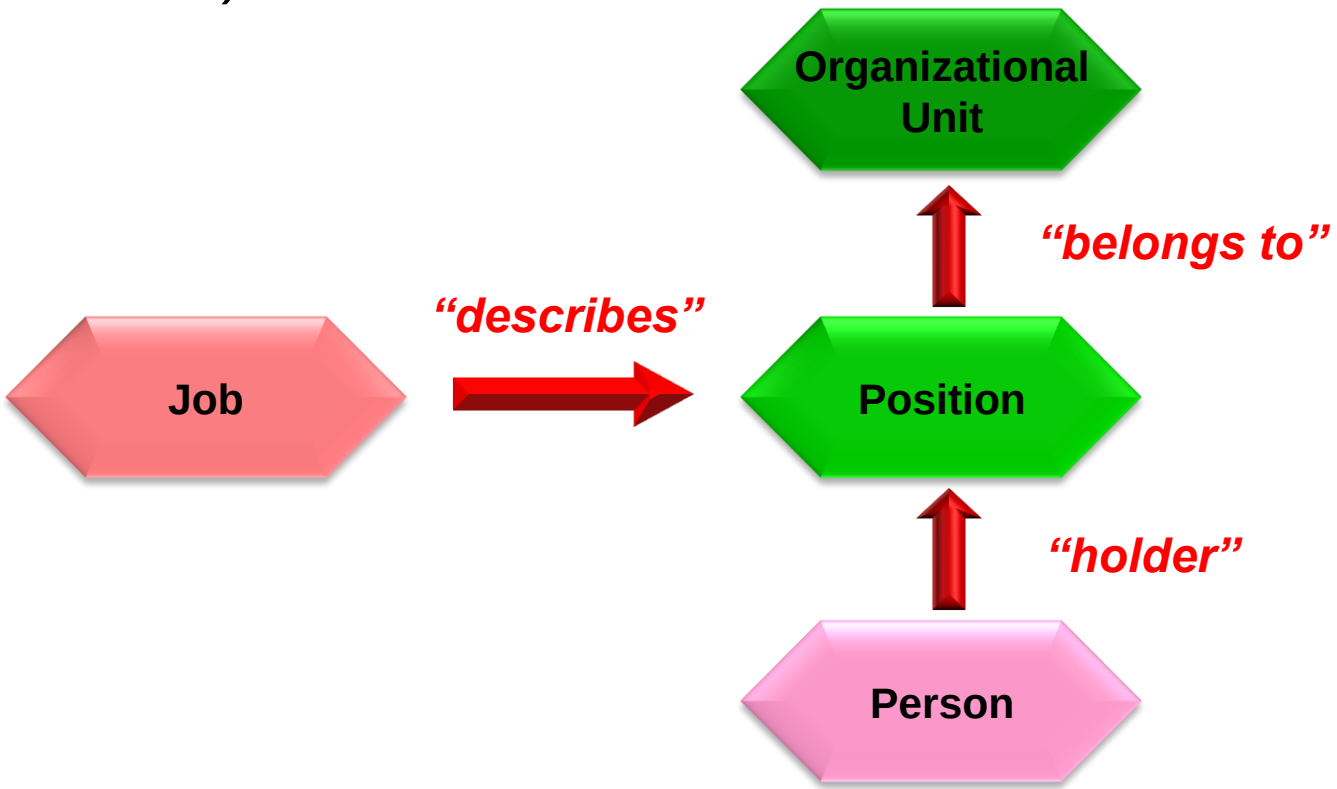
Organizational Relationships

- Relationships are created when organizational objects are linked together
- These relationships represent the organizational structure
  - Agency Organizational Processors create and maintain their organizational structure

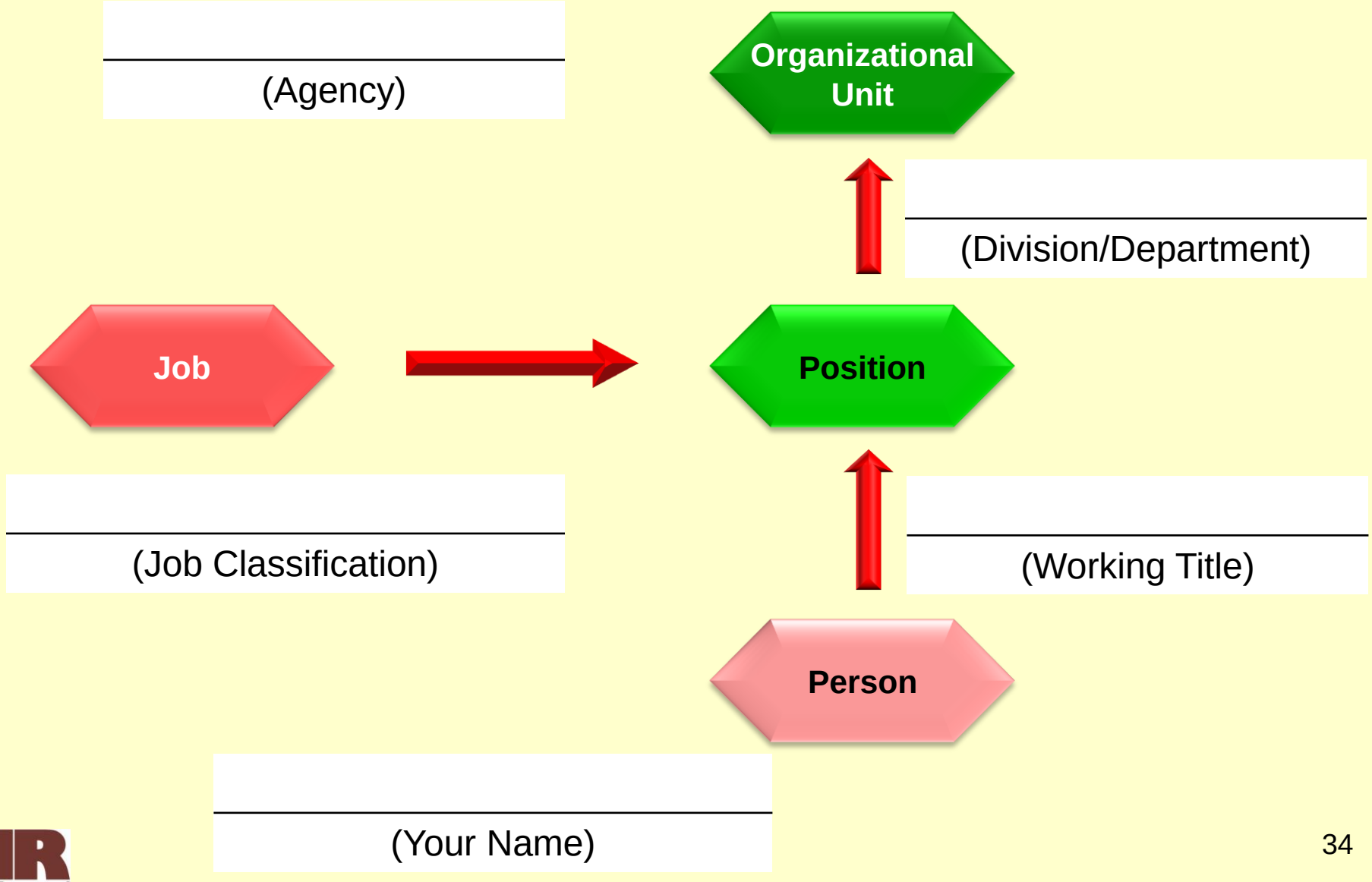


Organizational Structure - Relationships

- Organizational Structure is a representation of the reporting structure in an agency.
  - Made up of multiple organizational objects and their hierarchical relationships (e.g. organizational units, jobs, positions).



Organizational Structure



Characteristics/Attributes

- Organizational objects have additional information that defines the organizational unit, position or job.
  - *Planned Compensation* (1005)
    - Provides detail information on compensation for the linked job and position.
  - *Cost Distribution* (1018)
    - Displays the assigned cost center for the related position.
  - *Account Assignment* (1008)
    - Assigns the Personnel Area and the Personnel Sub-area.

Customer Service Specialist 2

- **Range 35**

→

Receptionist (7009999)

- **Range 35**

Review Questions

1. True or False: Agencies create Enterprise and Personnel Structures.
2. _____ are created when organizational objects are linked together.
3. Match the Organizational Objects to their term:

S	Job
P	Person
O	Cost Center
C	Organizational Unit
K	Position

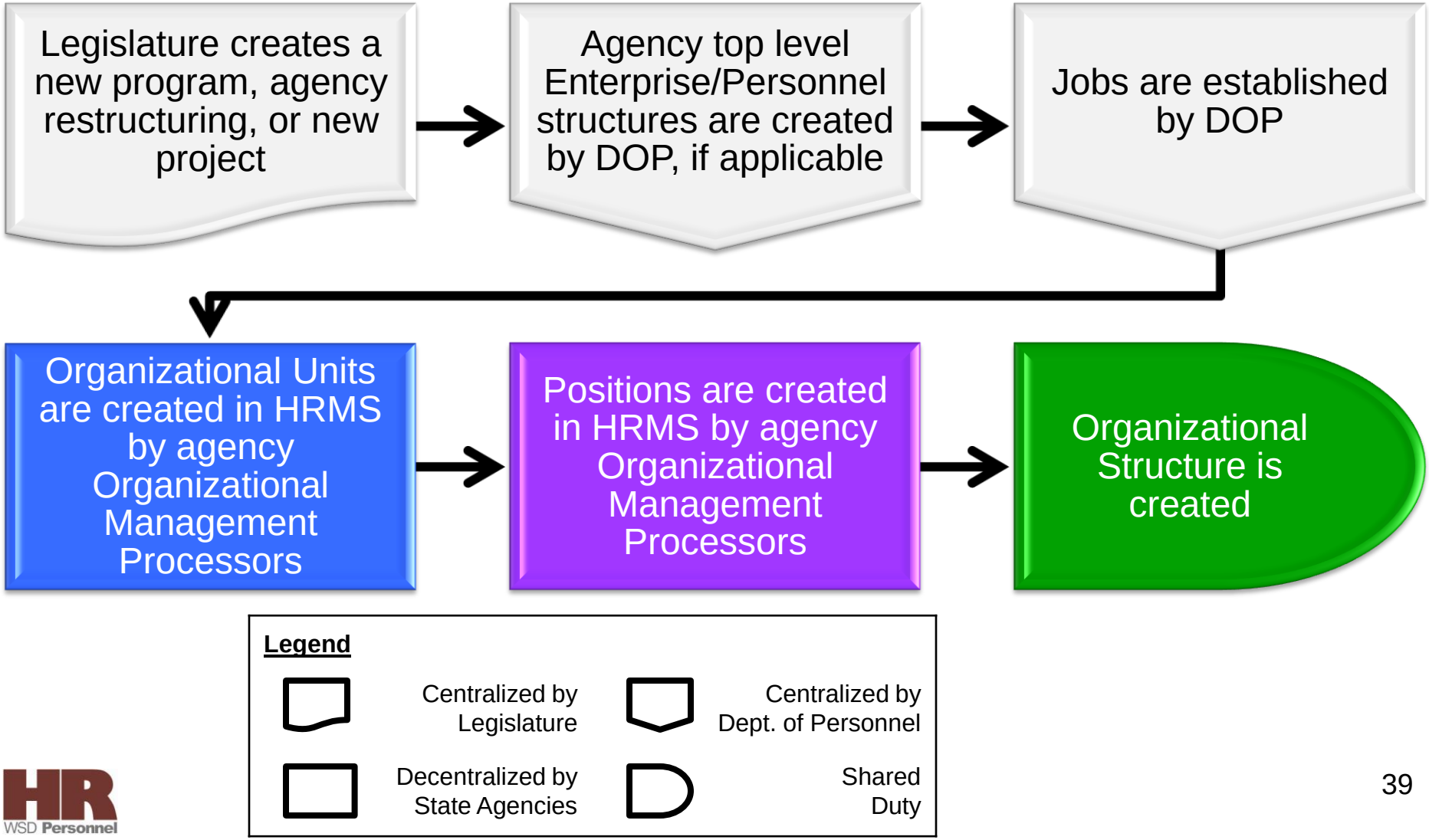
Section 2: Organizational Units

Organizational Units Overview

Upon completion of this section you will be able to:

- Describe the relationships that are created for an organizational unit
- Perform the following exercises:
  - Create Organizational Unit
  - Maintain Organizational Unit to Organizational Unit Relationship
  - Delimit Organizational Unit

Organizational Management Overall Process Flow

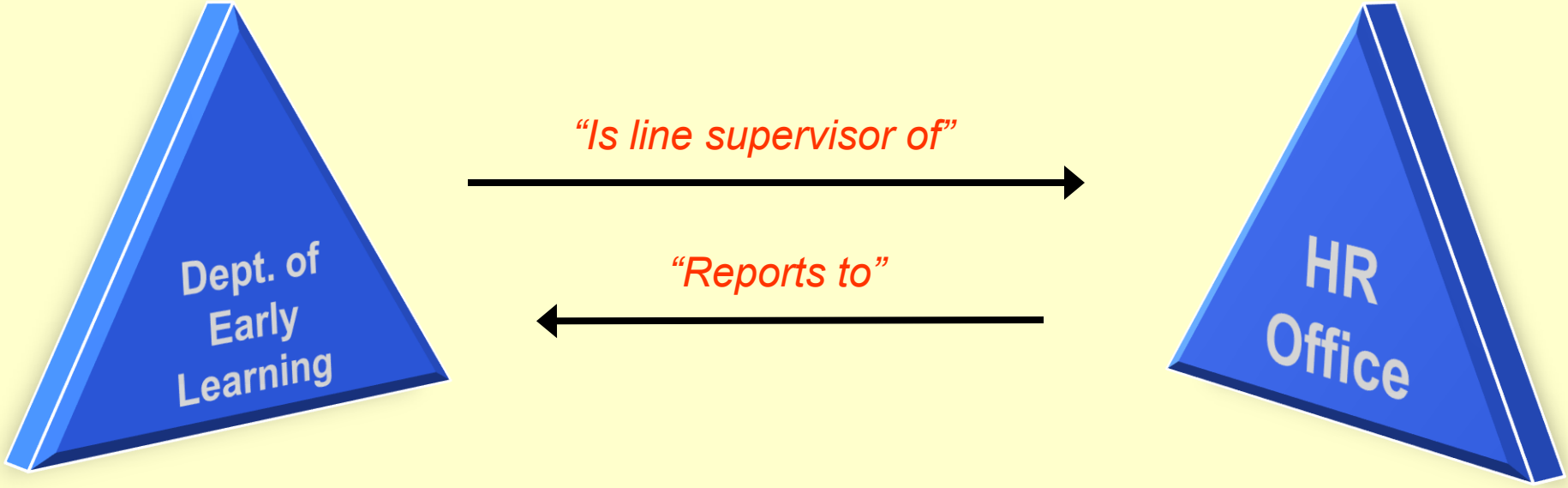


Organizational Relationships

- Organizational relationships establish the organizational structure or hierarchy:
  - Security is based on organizational structure
  - Many reports allow reporting by organizational structure
- You establish organizational relationships during the Create Organizational Unit Action (**PP03**).
- Two types of relationships are established when creating an organizational unit:
  - Organizational unit to organizational unit
  - Organizational unit to Cost center

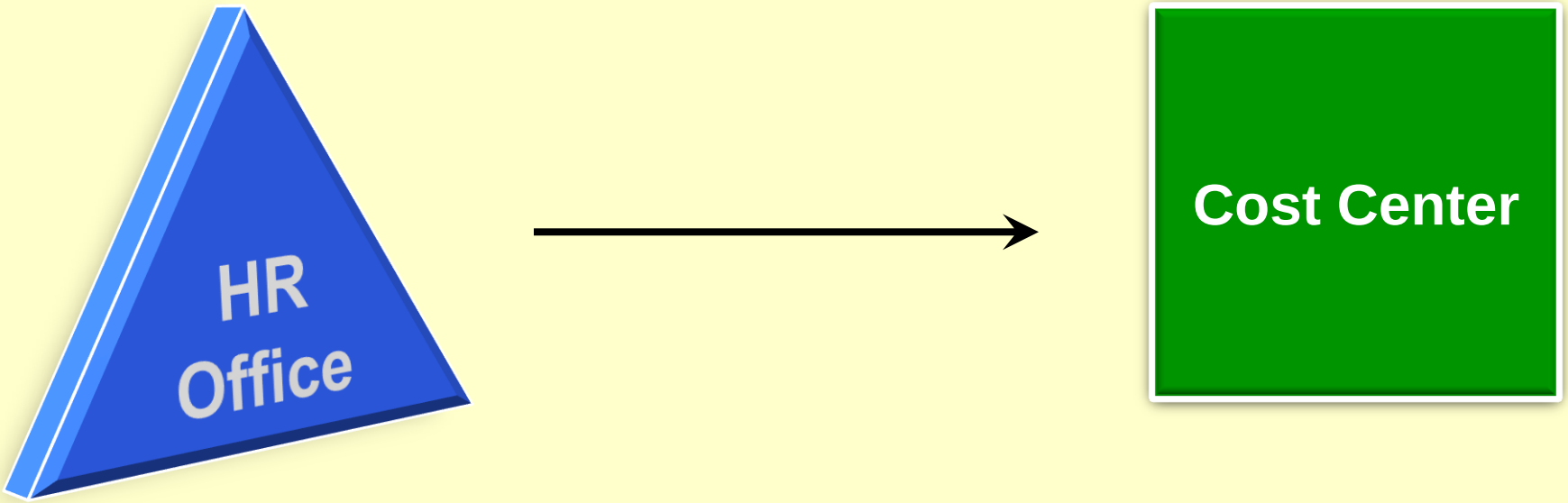
Organizational Unit to Organizational Unit Relationship

- An organizational unit “reports to” or “is line supervisor” of another organizational unit.
- This creates the organizational hierarchy.



Organizational Unit to Cost Center Relationship

- Every organizational unit must be “assigned” to a Cost Center to define the Business Area and Controlling Area.
  - The Cost Center represents a defined location of cost incurrence.



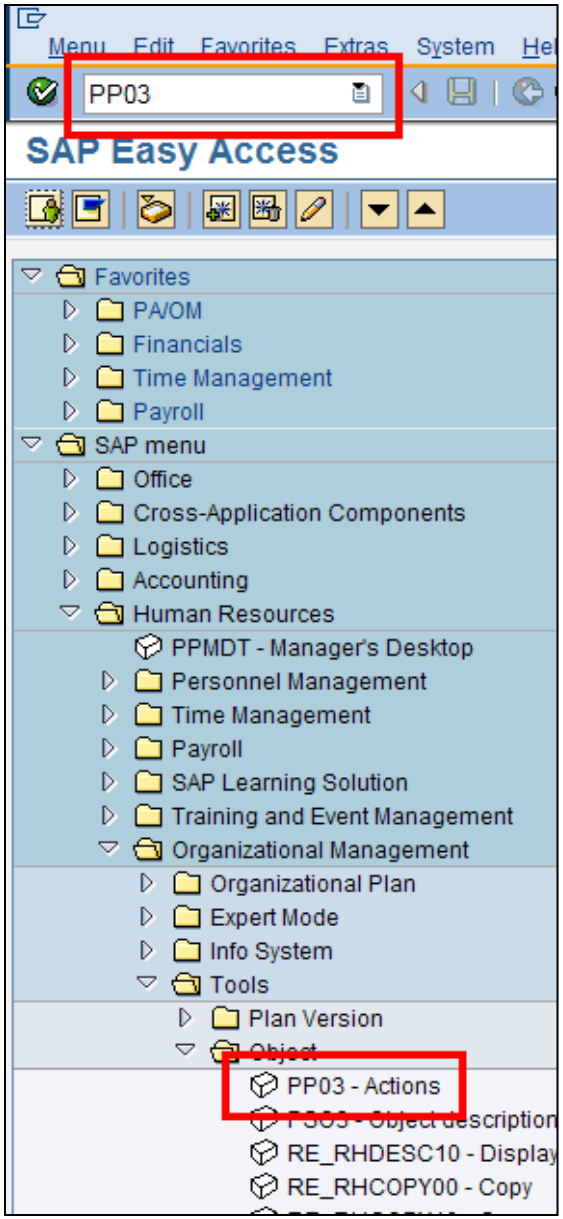
Section 2a: Create Organizational Unit

- Create the following infotypes during the Create Organizational Unit action (PP03) :
  - Object
  - Relationship
    - To reporting Organizational Unit
    - To assigned Cost Center
  - Description
  - Relationship to Department/Staff

Create Organizational Unit Action

1. To create an organizational unit use the Create Organizational Unit Action:
   - Follow Human Resources → Organizational Management → Tools → Object → Actions
   - Or use transaction code **PP03** in the **Command** field

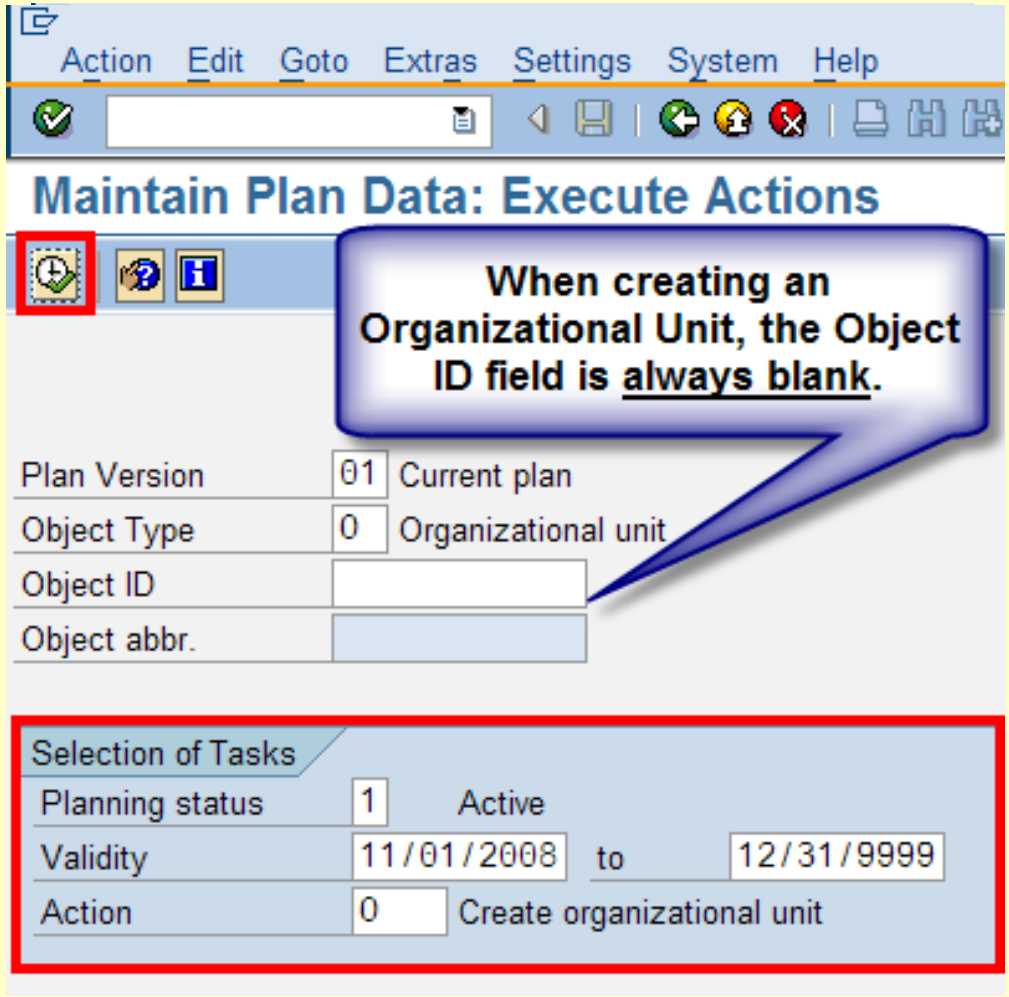
- Using this action guides you through all required infotypes



Maintain Plan Data: Execute Actions

- The Maintain Plan Data: Execute Actions records the effective date

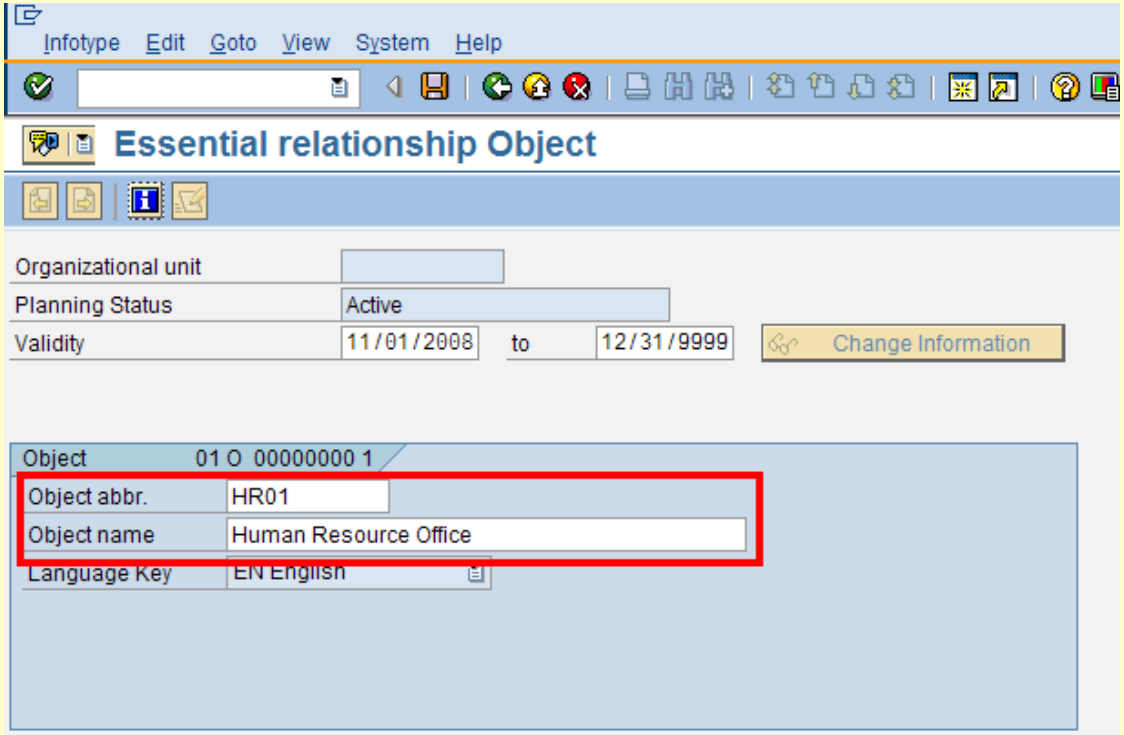
2. Fields to complete:
   - **Object type**
     - O (Org Unit)
   - **Validity** (Effective date)
   - **Action**
     - O (Create organizational unit)
3. Click (**Execute**) to execute the action



Essential Relationship Object

- The Essential relationship Object identifies the name of the organizational unit and creates the Object ID

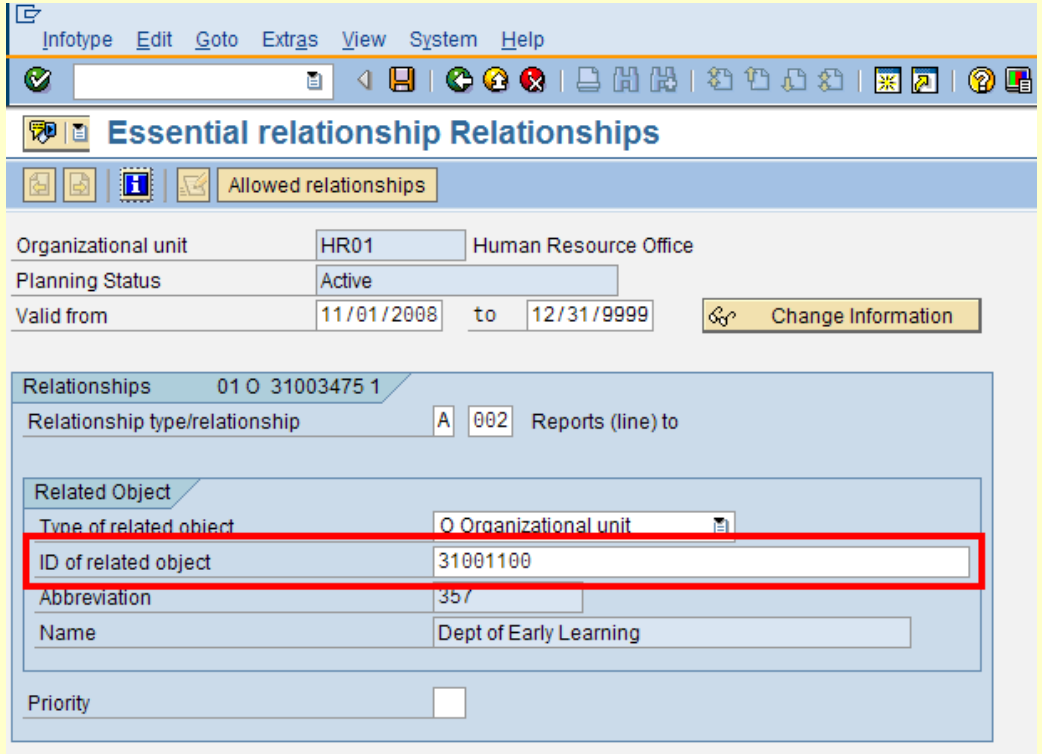
4. Fields to Complete:
   - **Object abbr.** (short text)
   - **Object name** (long text)
5. Click (**Enter**) to validate and then (**Save**) to save



Essential Relationship Relationships

- The Essential relationship Relationships creates a link between:
  - *The organizational unit being created and the organizational unit* it will be reporting to

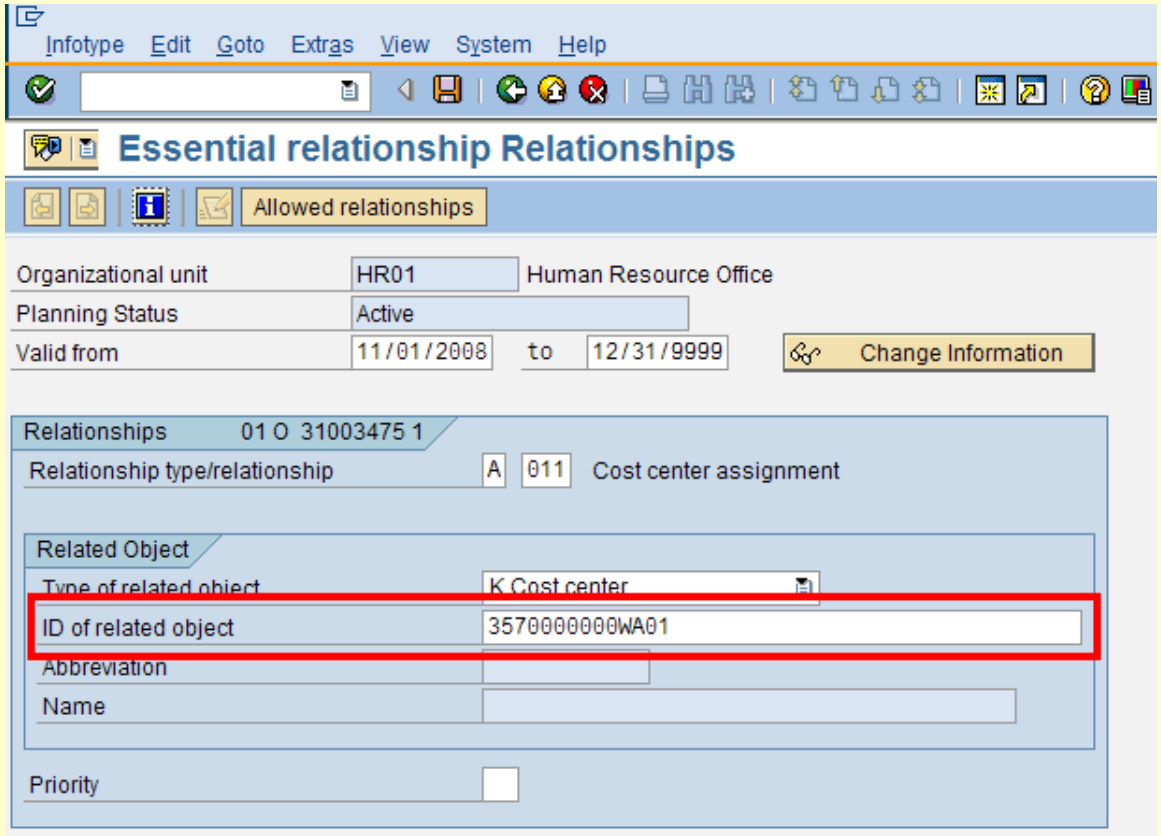
6. Fields to complete:
   - **ID of related object** (use matchcode)
7. Click (**Enter**) to validate and (**Save**) to save



Essential Relationship Relationships

- The Essential relationship Relationships infotype creates a link between the following:
  - *The organizational unit (O) and the cost center (K).*

8. Fields to complete:
   - **ID of related object** (use matchcode)
9. Click (**Enter**) to validate and (**Save**) to save



Essential Relationship Relationships

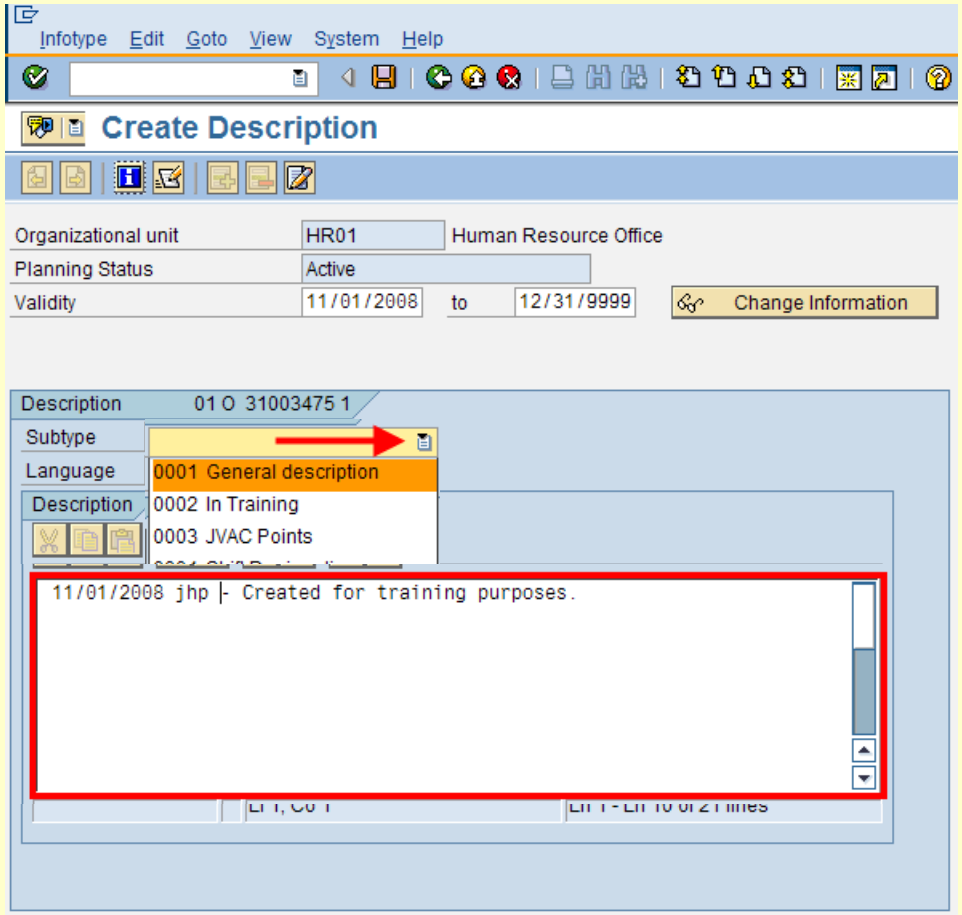
- Information defaults values from the previous infotype.
- **<u>Do not enter any information on this infotype.</u>**

10. Click (**Save**) to save and move to the next infotype.

Create Description

- The Create Description infotype provides the option to enter a general description of the organizational unit

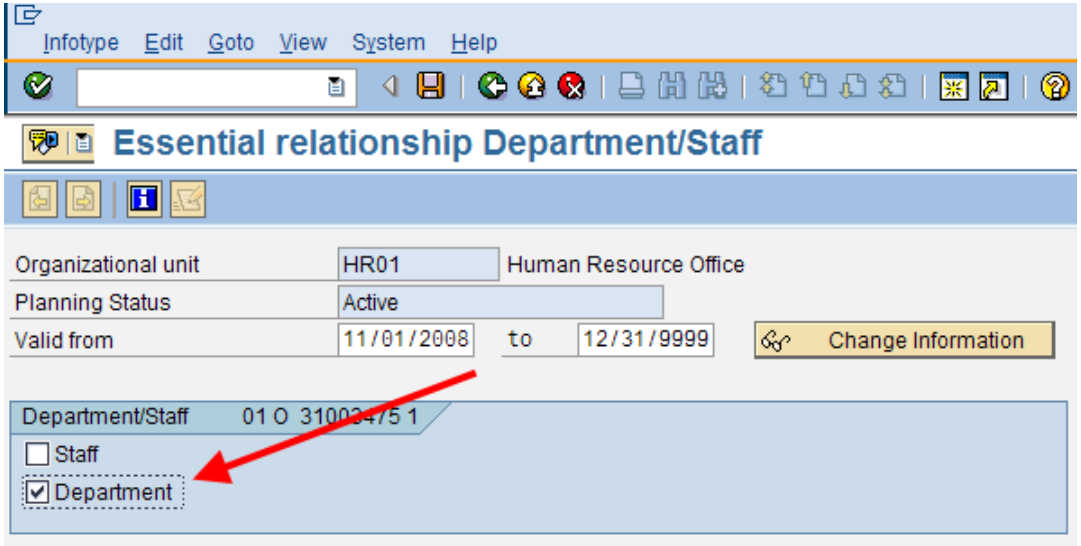
11. Fields to complete:
    - **Subtype**
    - **Text description**
12. Click (**Enter**) to validate and (**Save**) to save



Note: This infotype can be skipped by clicking (**Cancel**).

Create Department/Staff

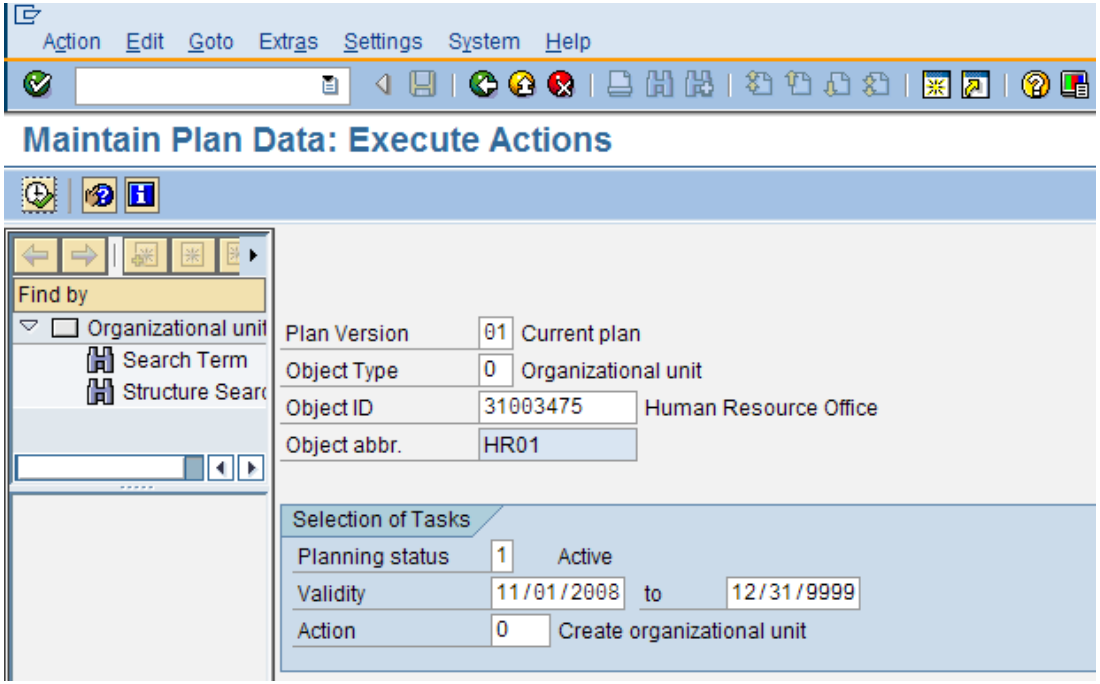
- The Essential relationship *Department/Staff* infotype displays the created organizational unit in the Organizational Structure.



13. Fields to complete:
    - **Department**
14. Click (**Enter**) and then click (**Save**) to save

Maintain Plan Data: Execute Actions

- After saving the Department/Staff infotype, you will be taken back to the beginning of the Maintain Plan Data: Execute Actions.
- The HRMS Object ID number for the Organizational Unit you created will be in the Object ID field.



HRMS Activity

Create Organizational Unit Walk-through

Review Questions

1. What is the designated letter for the object type of Organizational Unit?

_____

_____

2. Which relationships are set up when creating an organizational unit?

_____

_____

2b: Maintain Organizational Unit

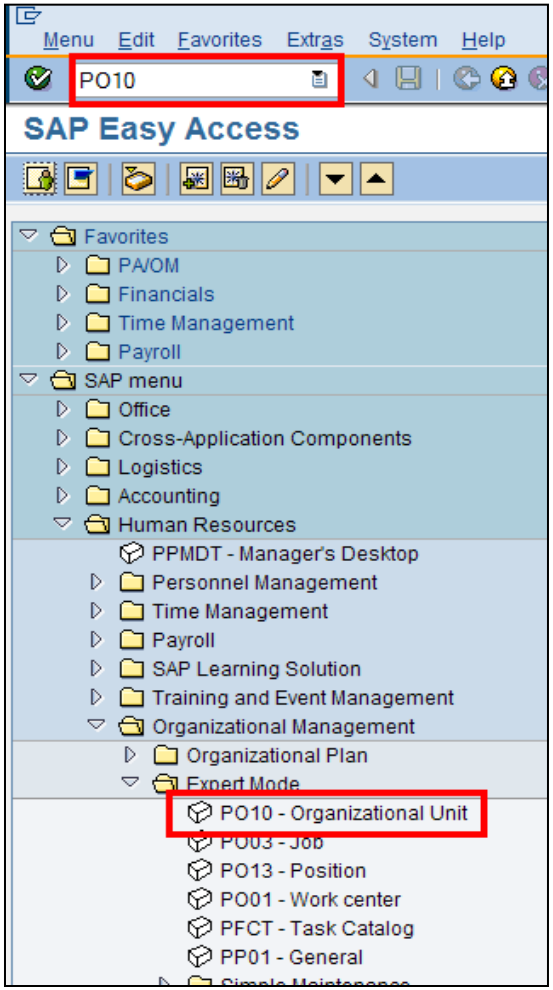
- Data created in HRMS is both current and historical.
- Infotypes enable HRMS to maintain information on all employees, as well as historical records.
- Based on the assigned role and agency, certain information is available to each user.
  - For example, an Organizational Management Processor in Washington State Patrol has access to their agency's organizational structure. While an Organizational Management Processor in Department of Fish and Wildlife has access to the same information, but for their agency only.

Maintain Organizational Unit – cont'd

- Reasons for maintaining organizational units include:
  - Moving an organizational unit as a result of a reorganization
  - Splitting one organizational unit into two organizational units
  - Combining two organizational units into one
  - Renaming an organizational unit, changing a description, or updating any other infotype record associated with the organizational unit

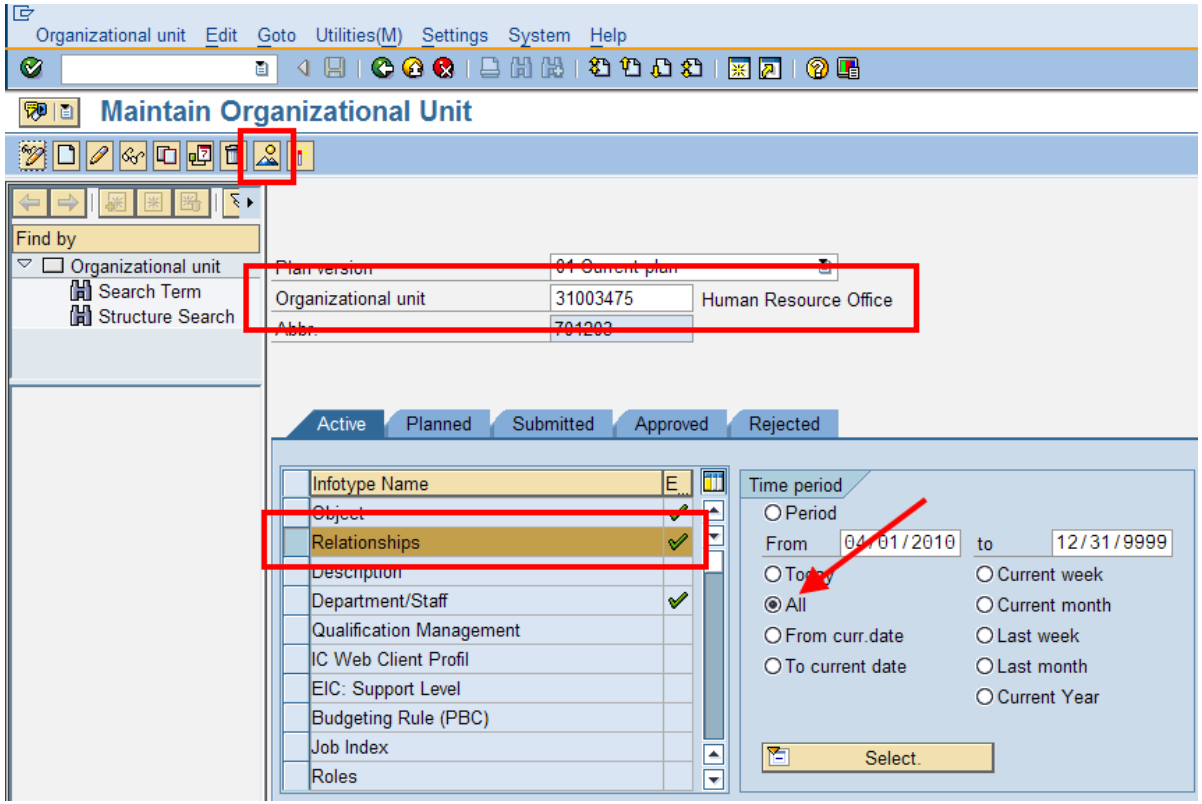
Maintain Organizational Unit action

1. To maintain an organizational unit use the Maintain Organizational Unit:
   - Follow Human Resources → Organizational Management → Expert Mode → Organizational unit
   - Or use transaction code **PO10** in the **Command** field



Maintain Relationships

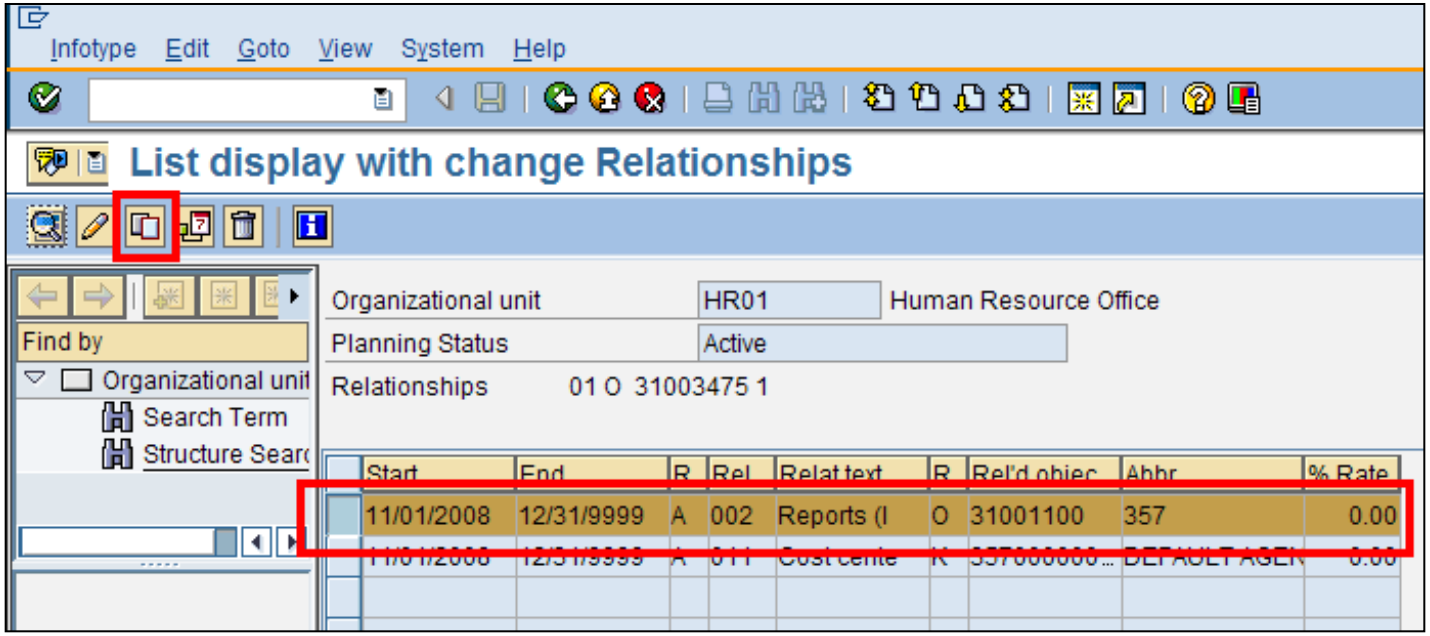
2. Enter the Organizational Unit Object ID and click (Enter) to validate
3. Click the gray box to the left of **Relationships** to select
4. Click the radio button 'All'
5. Click (Overview) for an overview of all actions associated with *Relationships* (1001)



Note: The additional infotypes displayed are not being used by the State of Washington. See the Additional Information section to remove from view.

Maintain Relationships

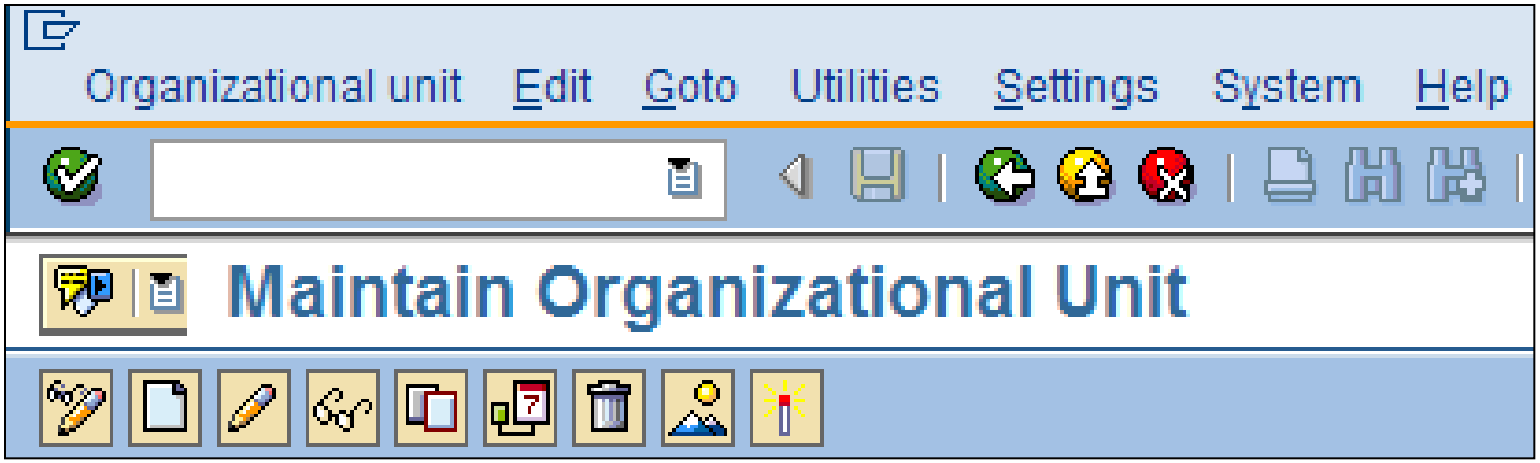
5. Click the gray box to left of the appropriate record
6. Click (**Copy**) to copy and continue



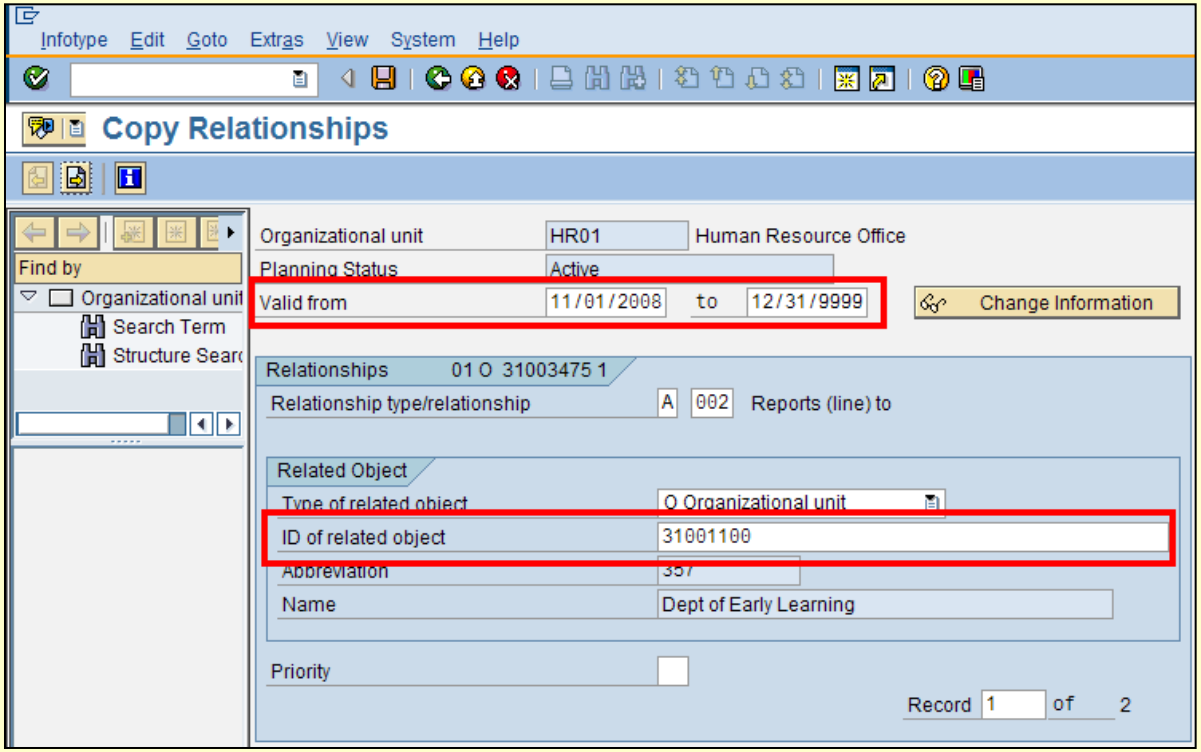
Maintain Function Keys

Choosing the appropriate function key is important:

- Click (**Create**) to create a new record
- To update the infotype and record the history, click (**Copy**)
  - The new start date of the record will be used for the current information. This will end date the existing record and reduces data entry.
- To change/correct the infotype with no history, click (**Change**)



Maintain Relationships



8. Fields to complete:
   - **Valid from** (effective dates)
   - **ID of related object** (use matchcode)
9. Click (**Enter**) to validate and click (**Save**) to save

HRMS Activity

Maintain Organizational Unit Exercise

Section 2c: Delimit Organizational Unit

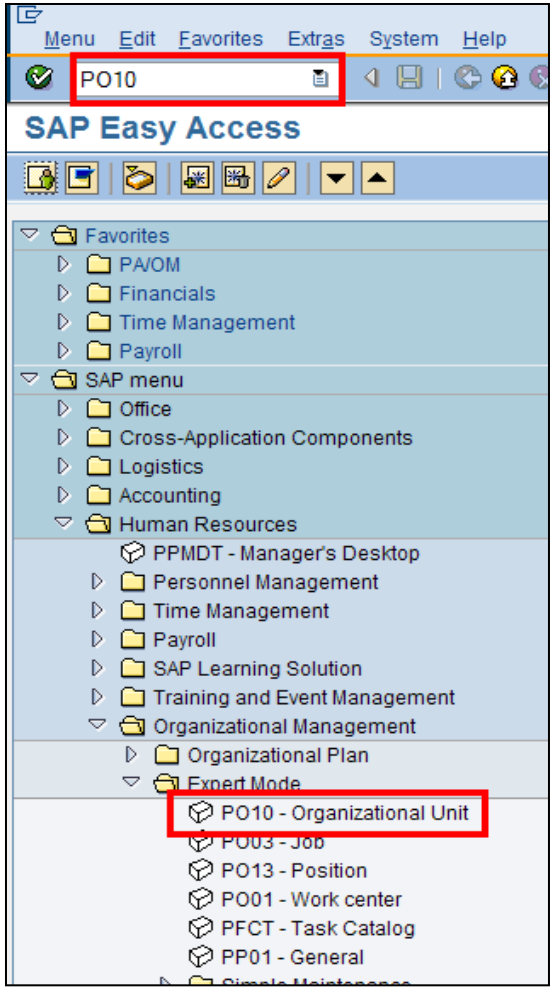
- You automatically delimit individual infotype records when you create and save a copy of an infotype record.
- You can also delimit the entire organizational unit when its no longer needed due to a reorganization and for other business reasons.
  - This will delimit the organizational unit's attributes and relationships and keep a history of the organizational unit.

Delimit Organizational Unit – cont'd

- When you delimit an organizational unit, all relationships will be delimited.
  - Use Overview function to review the *Relationships* (1001) to ensure there are **no active relationships** with positions or with organizational units that report to the organizational unit you are delimiting.

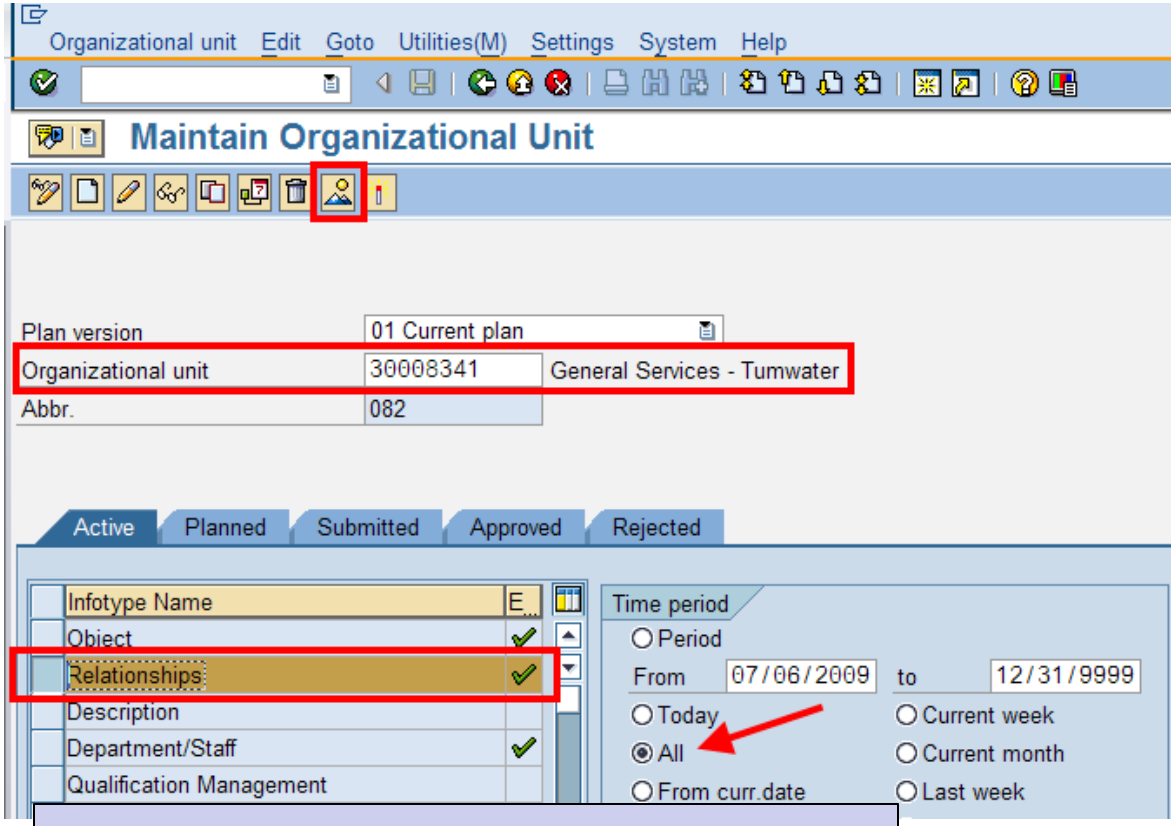
Delimit Organizational Unit action

1. To delimit an organizational unit use the Maintain Organizational Unit action:
   - Follow Human Resources → Organizational Management → Expert Mode → Organizational unit
   - Or use transaction code **PO10** in the **Command** field



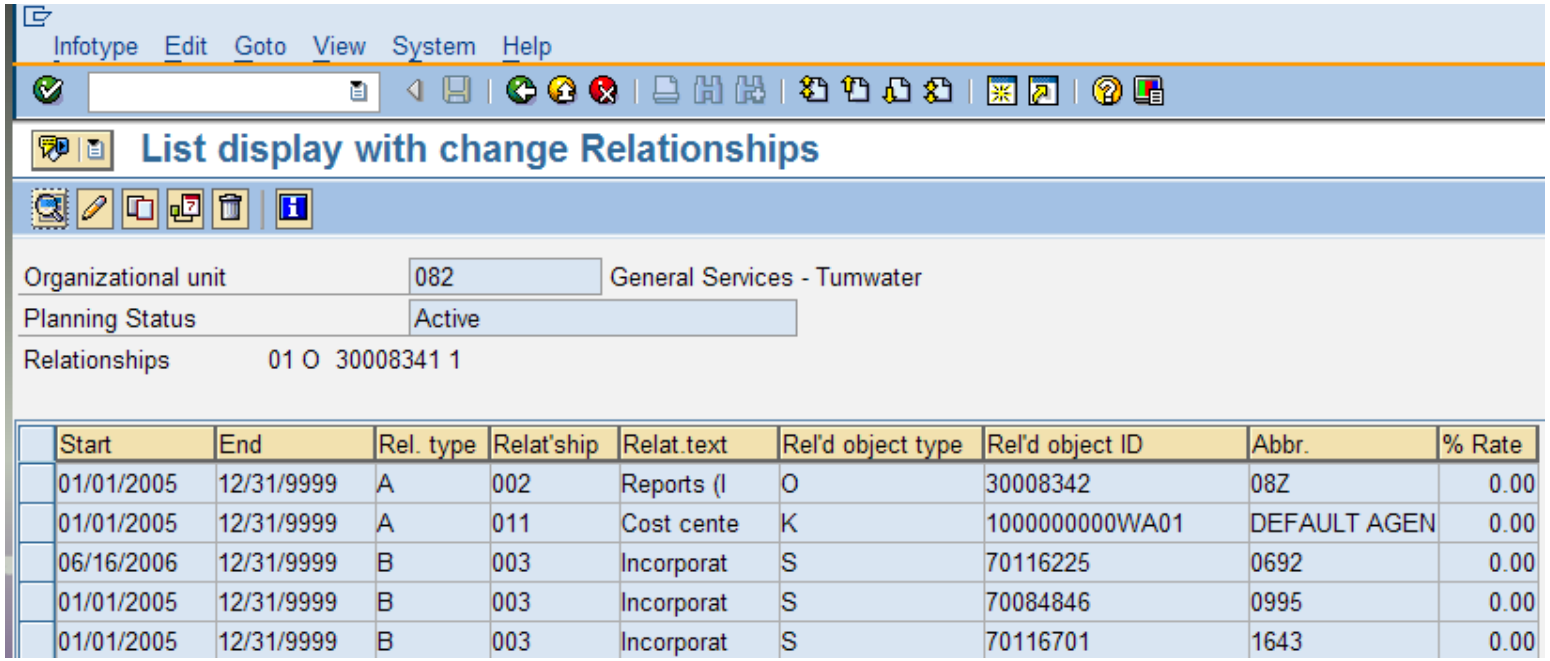
Delimit Organizational Unit

2. Enter the organizational unit number and click (**Enter**) to validate
3. In the Time period section, click the radio button for 'All'
4. Click the gray box to the left of relationships
5. Click (**Overview**) for an overview of all actions



Note: The additional infotypes displayed are not being used by the State of Washington. See the Additional Information section to remove from view.

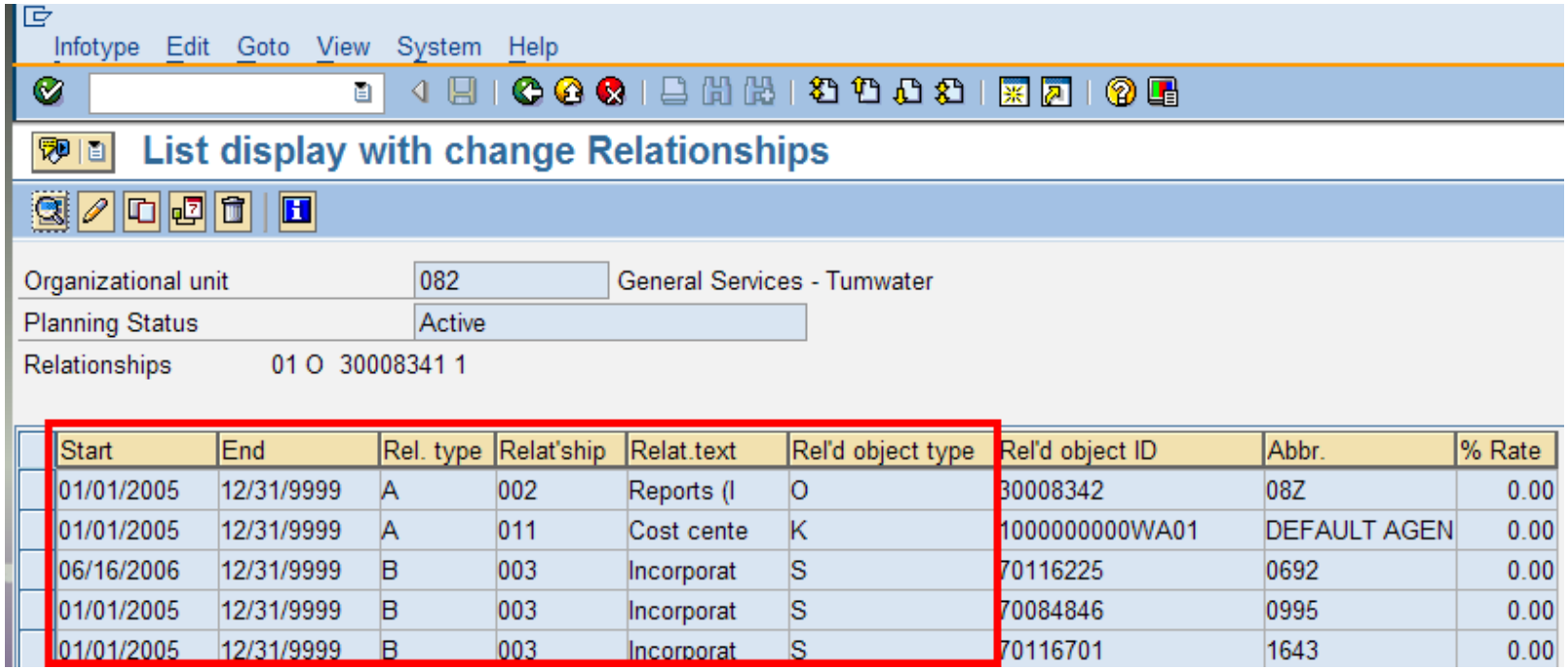
Delimit Organizational Unit



Start	End	Rel. type	Relat'ship	Relat.text	Rel'd object type	Rel'd object ID	Abbr.	% Rate
01/01/2005	12/31/9999	A	002	Reports (I	O	30008342	08Z	0.00
01/01/2005	12/31/9999	A	011	Cost cente	K	1000000000WA01	DEFAULT AGEN	0.00
06/16/2006	12/31/9999	B	003	Incorporat	S	70116225	0692	0.00
01/01/2005	12/31/9999	B	003	Incorporat	S	70084846	0995	0.00
01/01/2005	12/31/9999	B	003	Incorporat	S	70116701	1643	0.00

- You can determine the type of relationships by viewing the relationship type and the relationship object type.
  - Example :
    - B/002 Is line supervisor of O (Organizational Unit)
    - B/003 Incorporates S (Position)

Delimit Organizational Unit



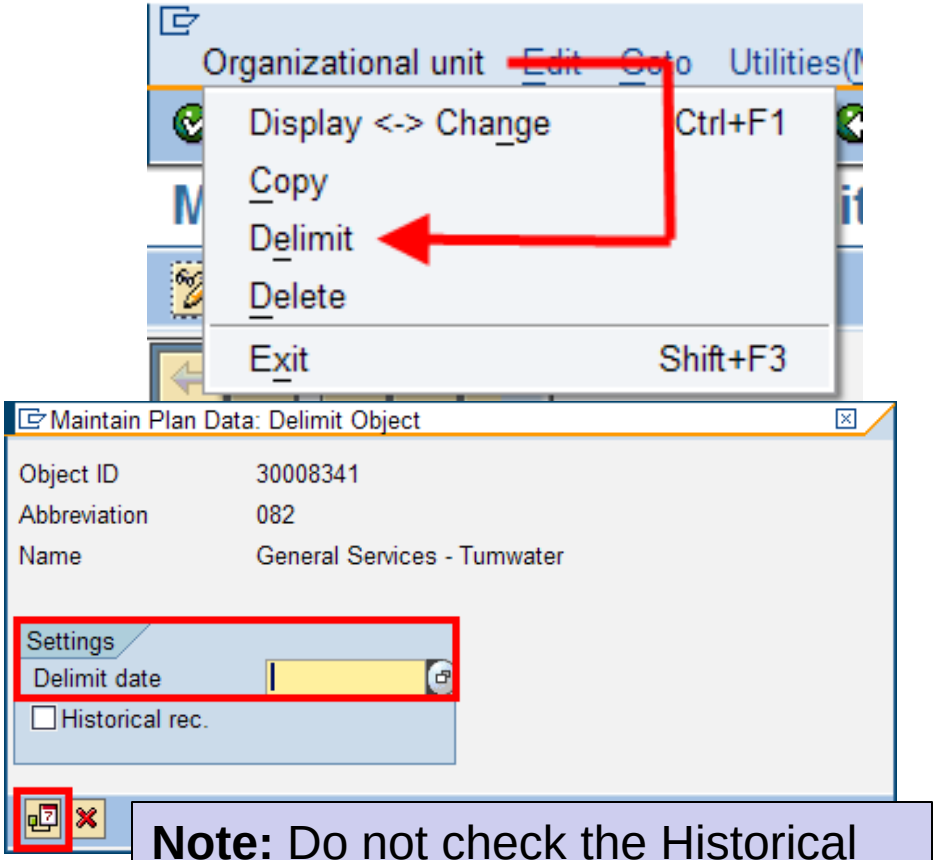
Start	End	Rel. type	Relat'ship	Relat.text	Rel'd object type	Rel'd object ID	Abbr.	% Rate
01/01/2005	12/31/9999	A	002	Reports (I	O	30008342	08Z	0.00
01/01/2005	12/31/9999	A	011	Cost cente	K	1000000000WA01	DEFAULT AGEN	0.00
06/16/2006	12/31/9999	B	003	Incorporat	S	70116225	0692	0.00
01/01/2005	12/31/9999	B	003	Incorporat	S	70084846	0995	0.00
01/01/2005	12/31/9999	B	003	Incorporat	S	70116701	1643	0.00

- Active positions or organizational units that report to the organizational unit you are delimiting, will need to have a new relationship with another active organizational unit before you can proceed to delimit.

6. To return to Maintain Organizational Unit, click (**Exit**).

Delimit Organizational Unit

7. To delimit an organizational unit, enter the organizational unit number and click (**Enter**) to validate
8. On the menu bar select Organizational Unit→ Delimit
9. From the Maintain Plan Data: Delimit Object pop-up, enter the Delimit date
10. Click (**Delimit object**)



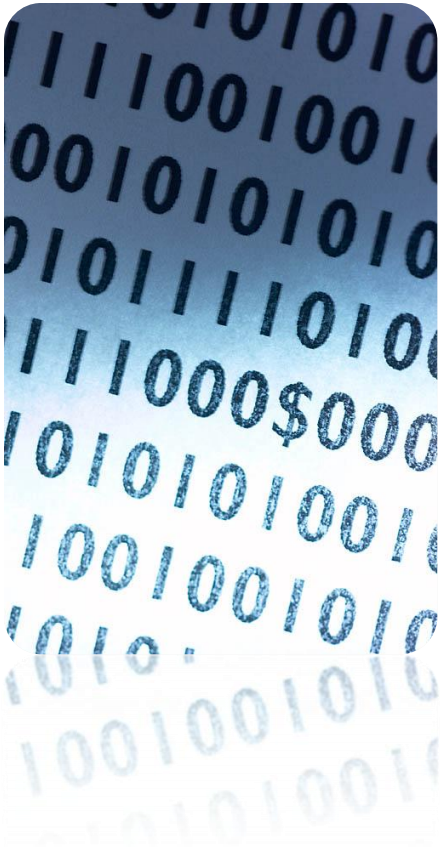
Note: Do not check the Historical rec. box when delimiting. If checked, the record cannot be changed.

HRMS Activity

Delimit Organizational Unit Exercise

Organizational Management Transactions

- **Organizational Unit**
  - Create Organizational Unit **PP03**
  - Display Organizational Unit **PO10D**
  - Maintain Organizational Unit **PO10**



What else do I need to know?

- See OLQR User Procedures:
  - Organizational Unit Action_Create
  - Organizational Unit_Delimit
  - Maintain Organizational Unit to Organizational Unit Relationship

Website address: http://win-shrweb.dis.wa.gov/olqr/nav/index.htm

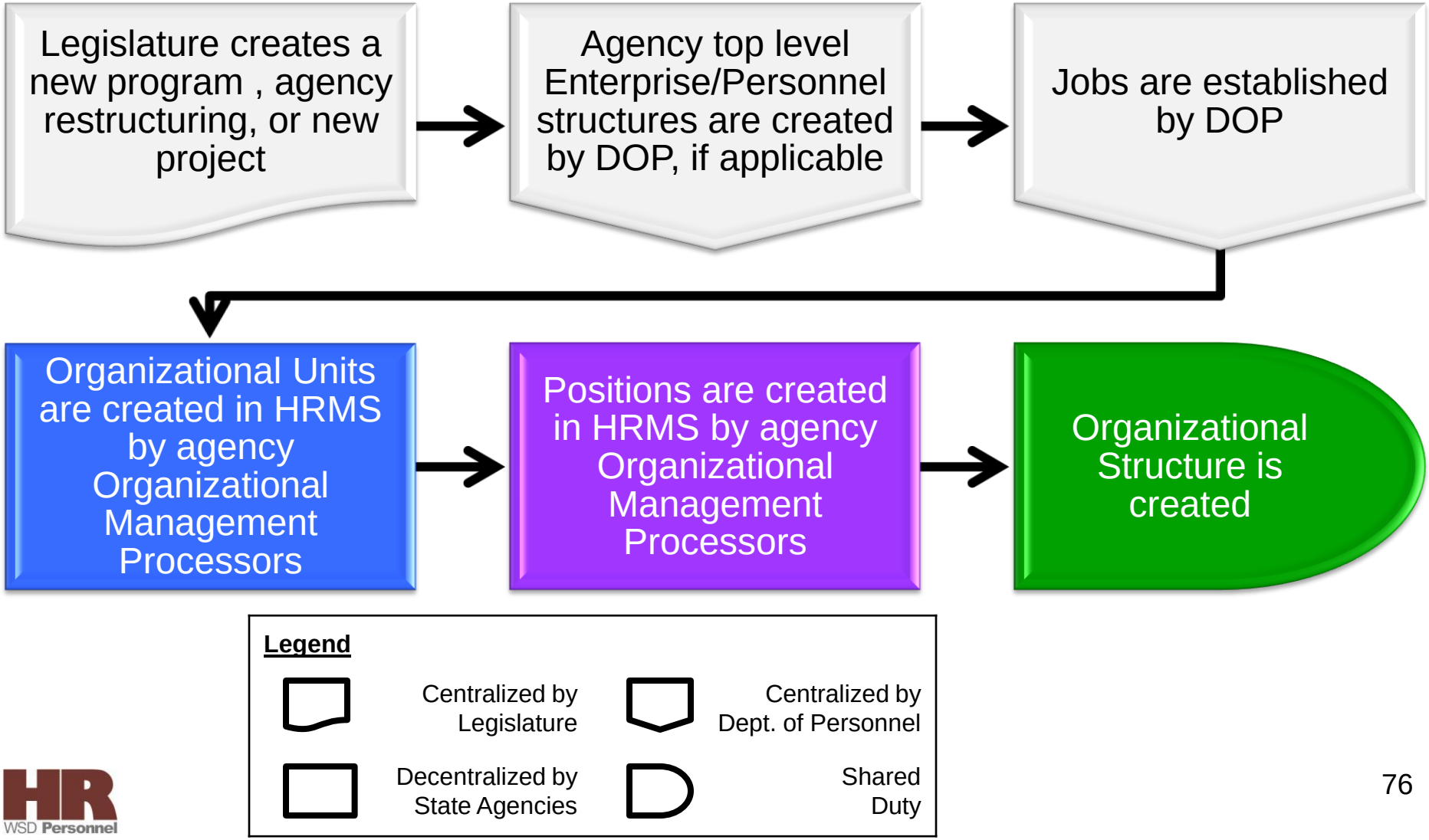
Section 3: Positions

Positions Overview

Upon completion of this section you will be able to:

- Explain the process of creating and maintaining positions
- Perform the following exercises:
  - Create a Position
  - Delimit a Position

Organizational Management Overall Process Flow



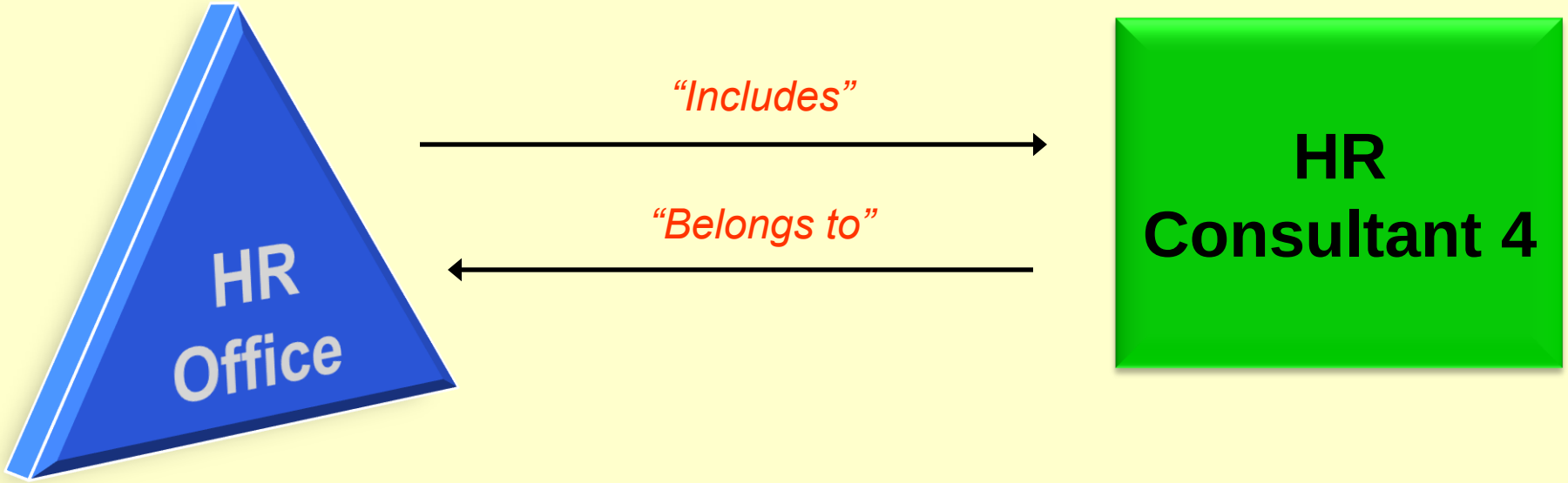
WSD Personnel

Position Relationships

- There are five relationships that can be established for a position.
- The following three are created in the Create Position action (**PP03**):
  - Position to organizational unit
  - Position to job
  - Position to reporting position
- The following two are established outside of the Create Position action:
  - Assignment pay
  - Dual language

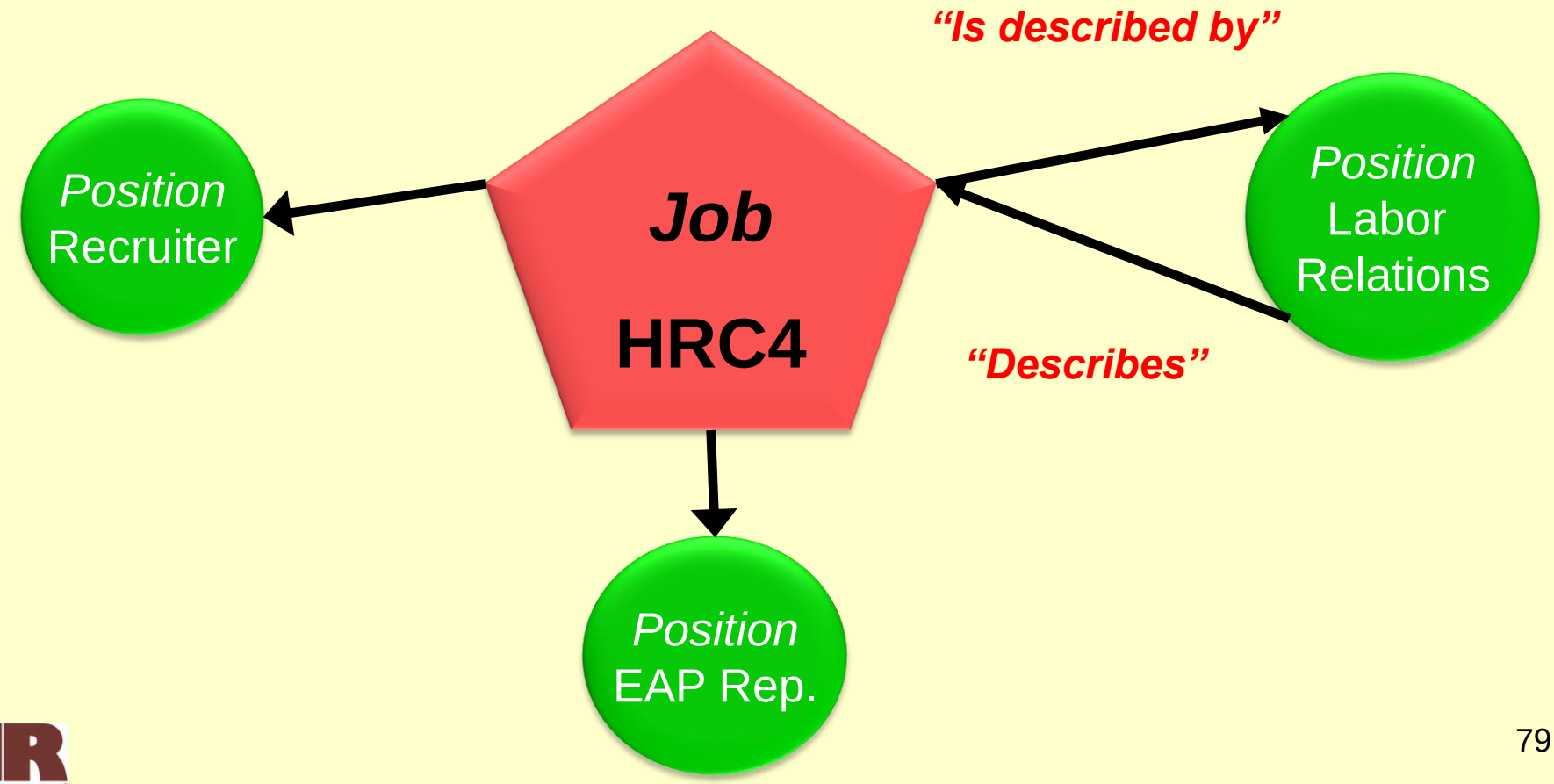
Position to Organizational Unit Relationships

- Position to organizational unit relationships:
  - Position belongs to organizational unit
  - Organizational unit includes position



Position to Job Relationships

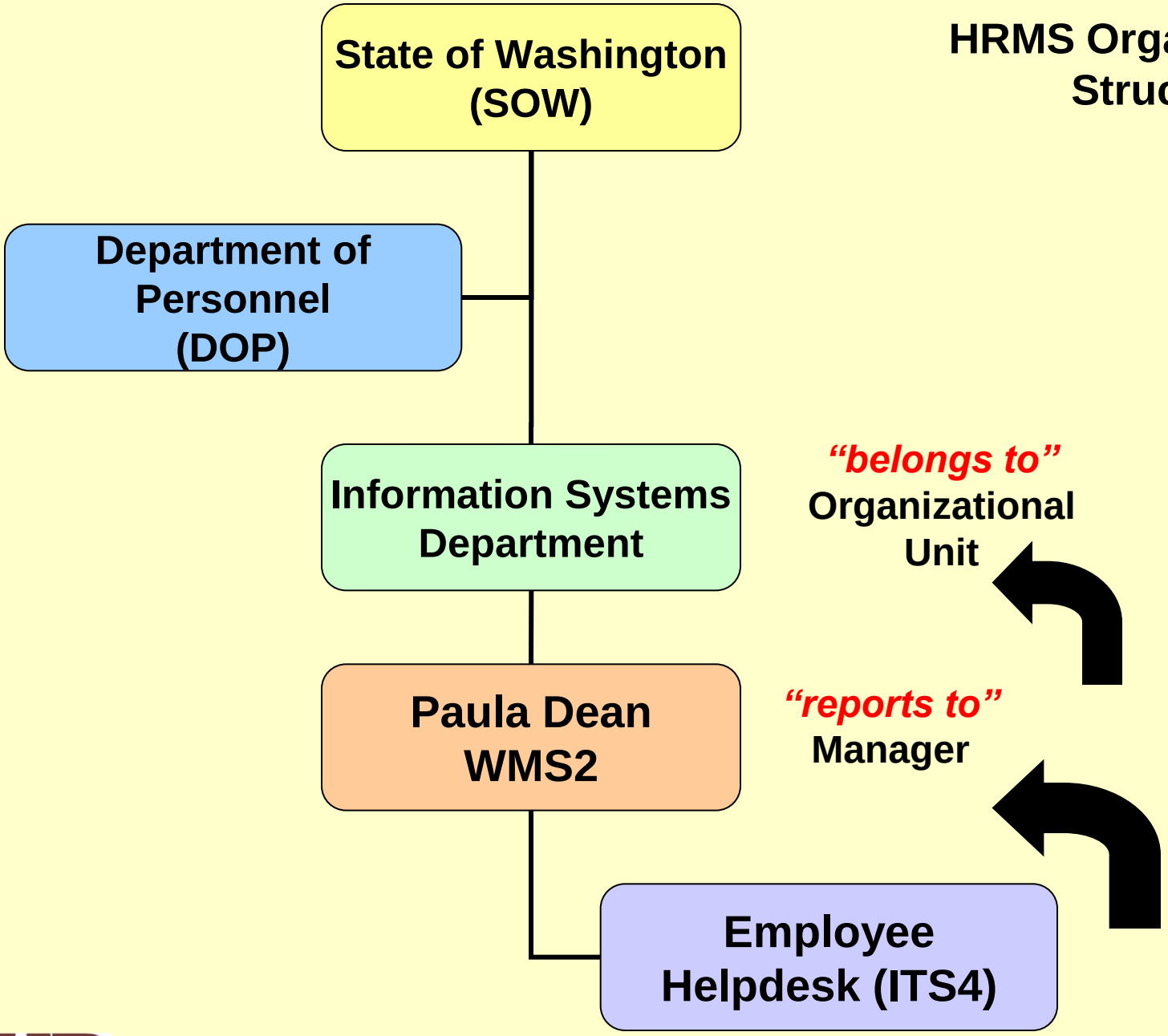
- Position to job relationships:
  - Job describes a position
  - Position is described by a job



Position to Position Relationships

- Position to position relationship:
  - Reports to/is line supervisor of
  - Defines the supervisor and subordinate

HRMS Organizational Structure



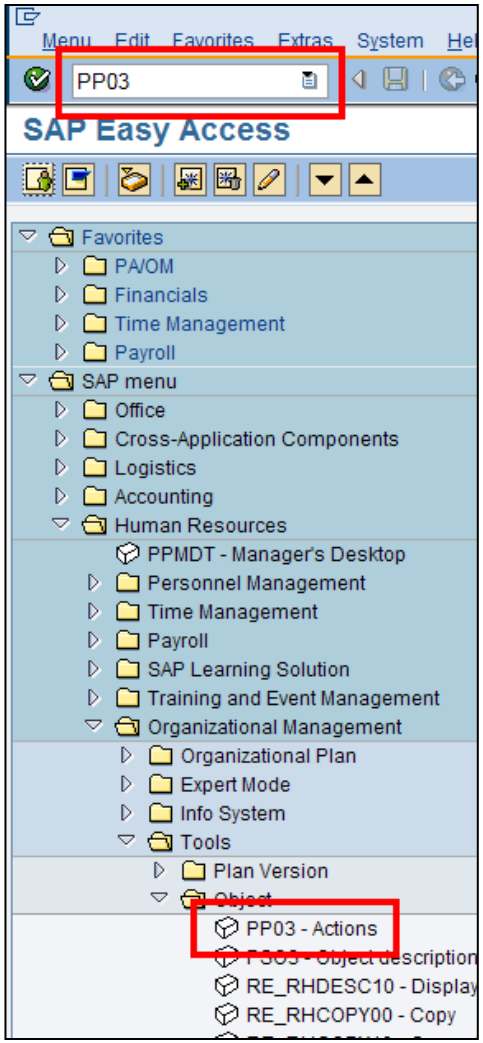
Section 3a: Create Position Action Infotypes

- Create the following infotypes during the Create Position action including:
  - *Object* (1000)
  - *Relationship* (1001)
  - *Description* (1002)
  - *Employee Group/Sub-group* (1013)
  - *Account Assignment* (1008)
  - *Planned Compensation* (1005)
  - *Vacancy* (1007)
  - *Work Schedule* (1011)
  - *Cost Distribution* (1018)
  - *Address* (1028)
  - *Job Attributes* (1660)

Create Position Action

1. To create a position use the Create Position action:
   - Follow Human Resources → Organizational Management → Tools → Object → Actions
   - Or use transaction code **PP03** in the **Command** field

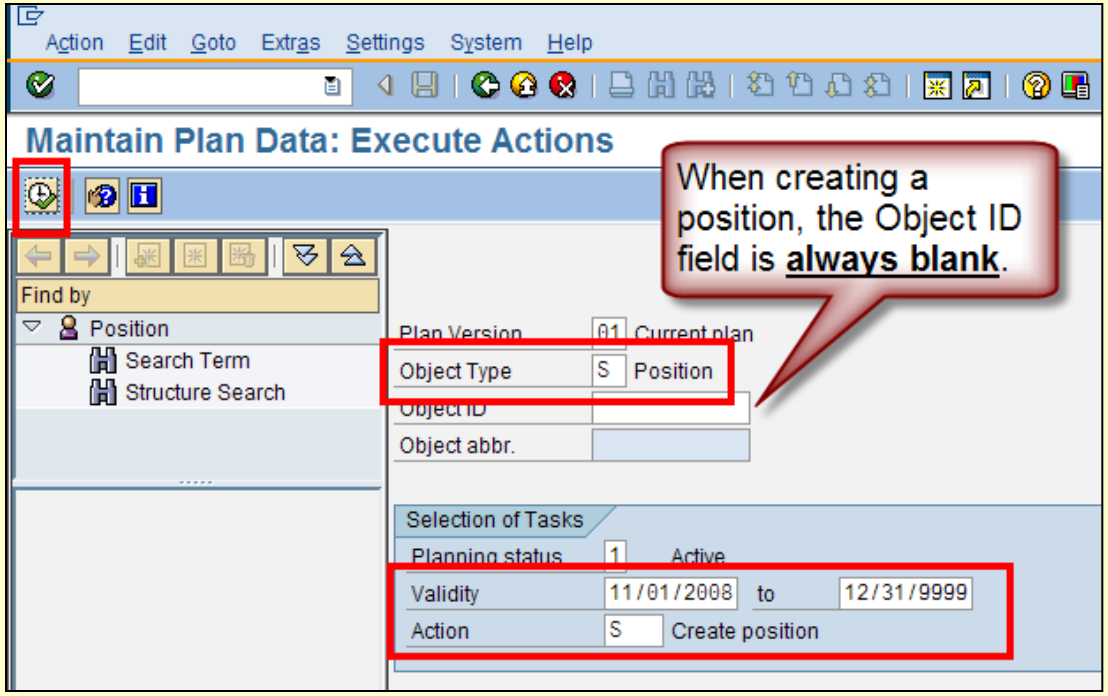
- Using this action guides you through all required infotypes are created



Maintain Plan Data: Execute Actions

- The Maintain Plan Data: Execute Actions records the effective date

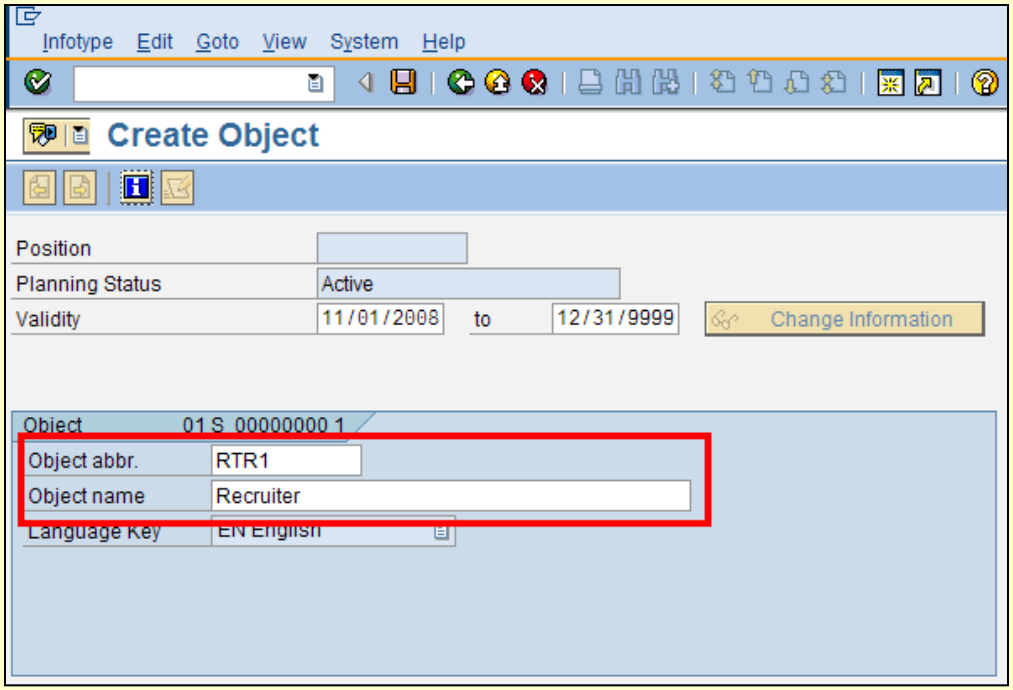
2. Field to complete:
   - **Object type**
     - S (Position)
   - **Validity** (effective date)
   - **Action**
     - S (Create Position)
3. Click (**Execute**) to execute the action



Create Object

- The Object infotype creates the name of the position

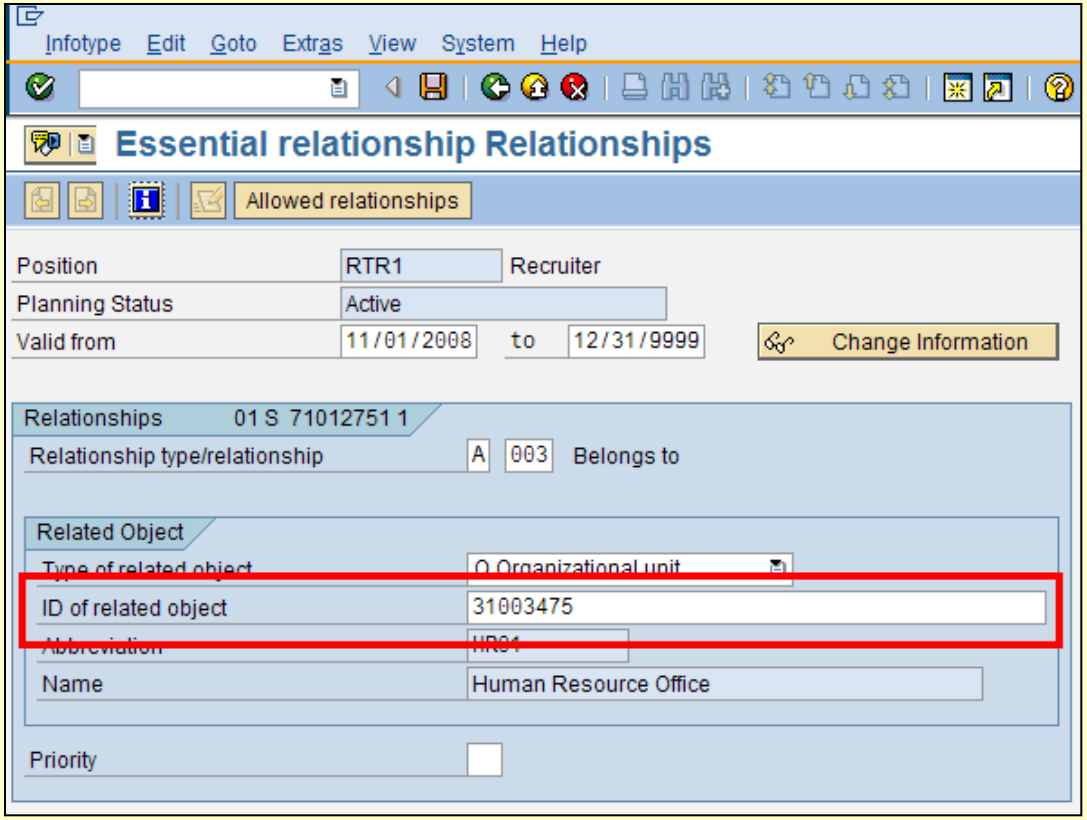
4. Fields to Complete:
   - **Object abbreviation**
   - **Object name**
5. Click (**Enter**) to validate and click (**Save**) to save



Essential relationship Relationships

- The Essential relationship Relationships create a link between:
  - *The position and organizational unit*

6. Fields to complete:
   - **ID of related object** (use matchcode)
7. Click (**Enter**) to validate and click (**Save**) to save

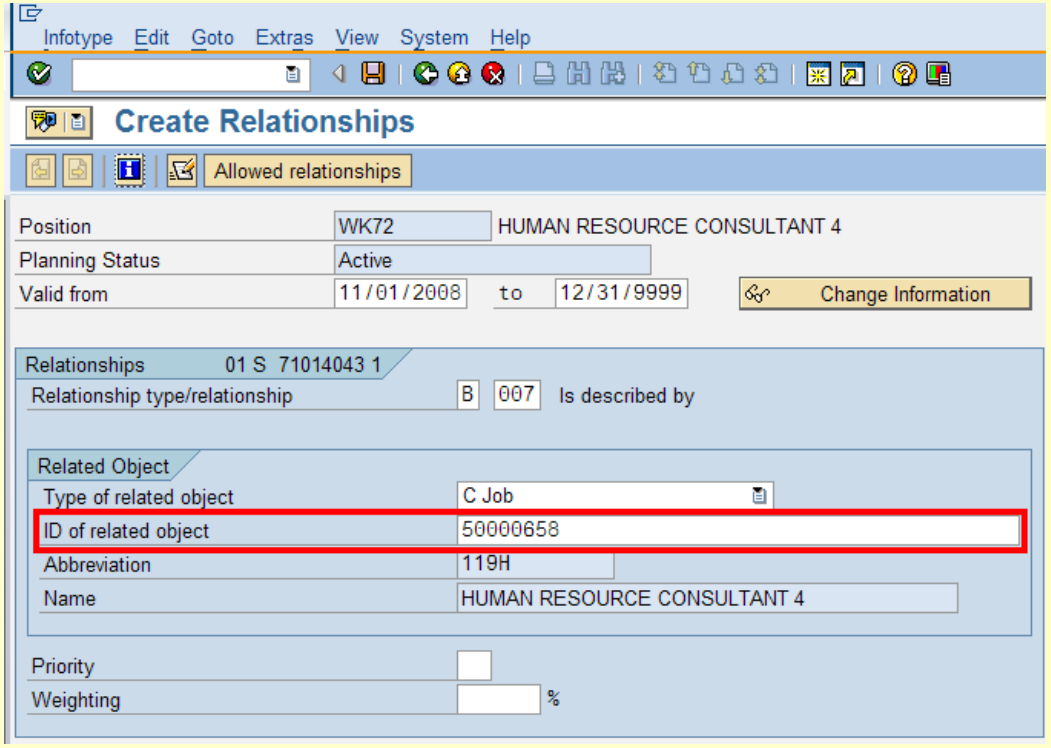


Essential relationship Relationships

- The Essential relationship Relationships create a link between:
  - *The position and the job classification*

8. Fields to complete:
   - **ID of related object** (use matchcode)

9. Click (**Enter**) to validate and click (**Save**) to save

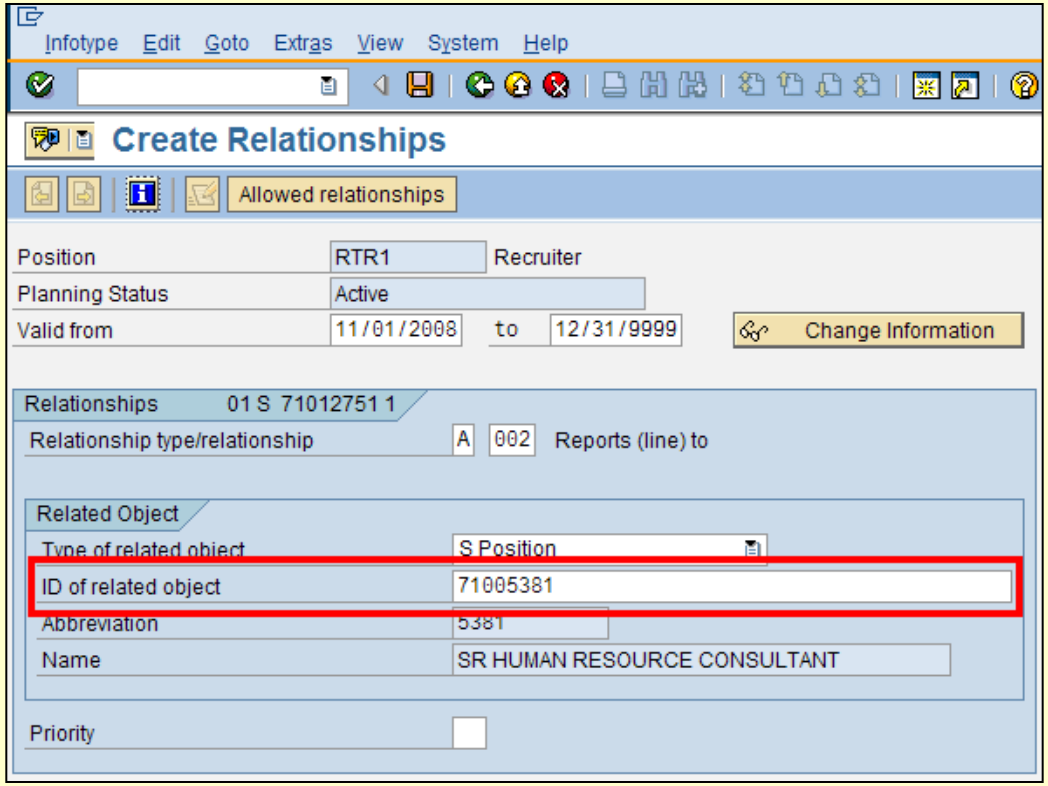


Create Relationships

- The Essential relationship Relationships create a link between:
  - *The position and the supervising position*

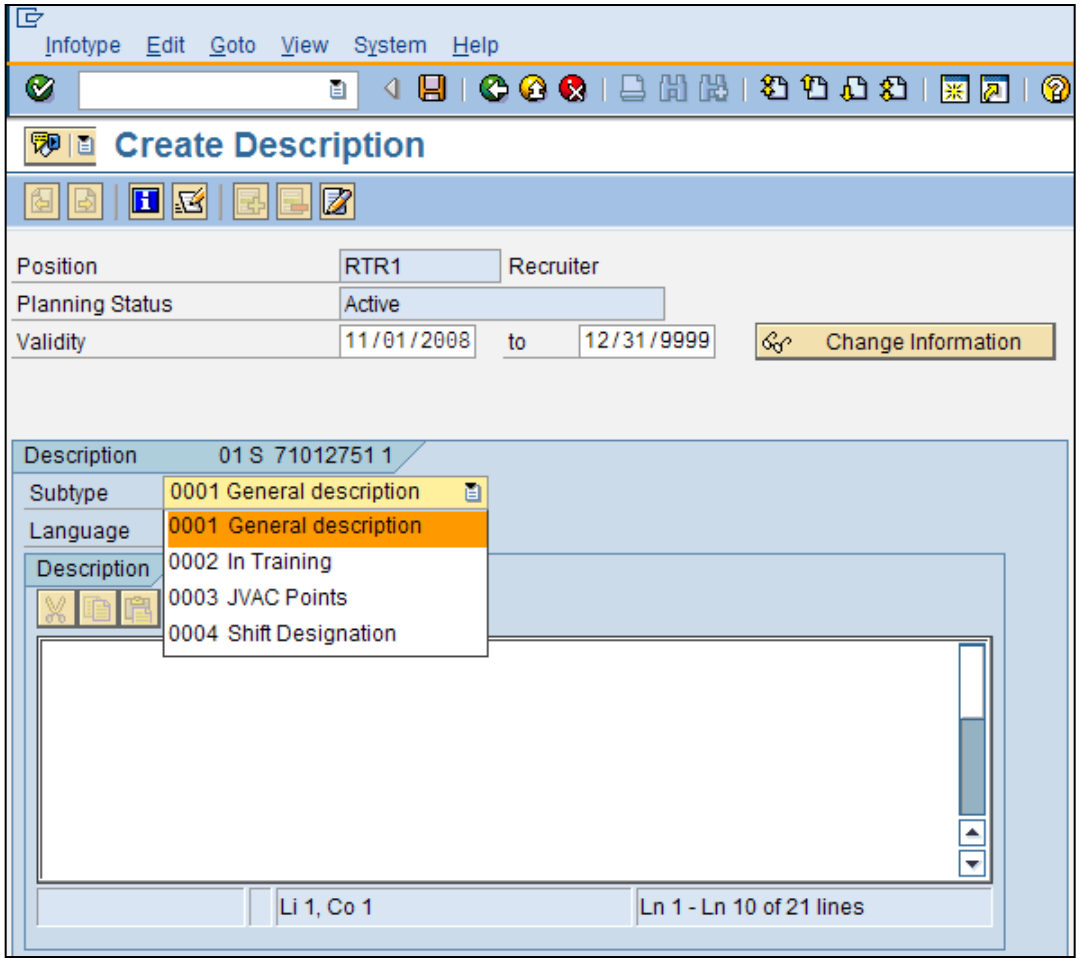
10. Fields to complete:
    - **ID of related object** (use matchcode)

11. Click (**Enter**) to validate and click (**Save**) to save



Create Description

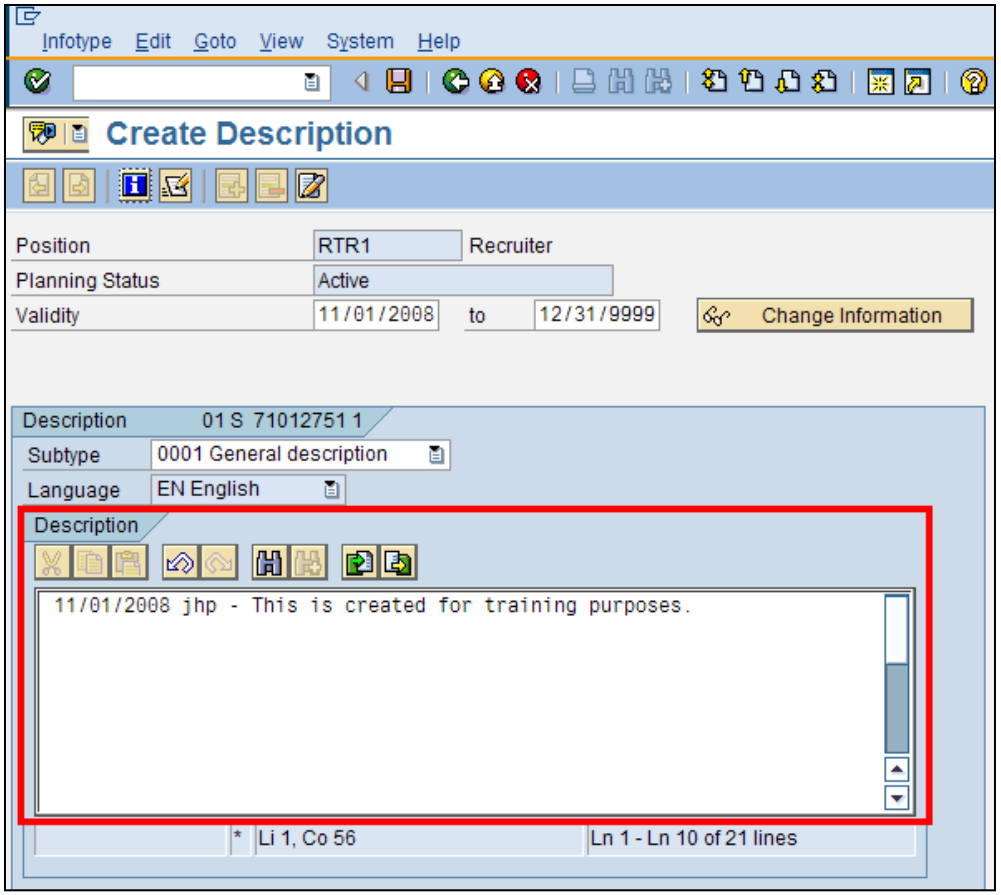
- The Description infotype is optional to provide information for:
  - **General description**
  - **JVAC Points**
  - **In Training**
  - **Shift Designation**



Create Description

- Each Subtype will display in the action

12. Fields to complete:
    - **Description**
13. Click (**Enter**) to validate and click (**Save**) to save

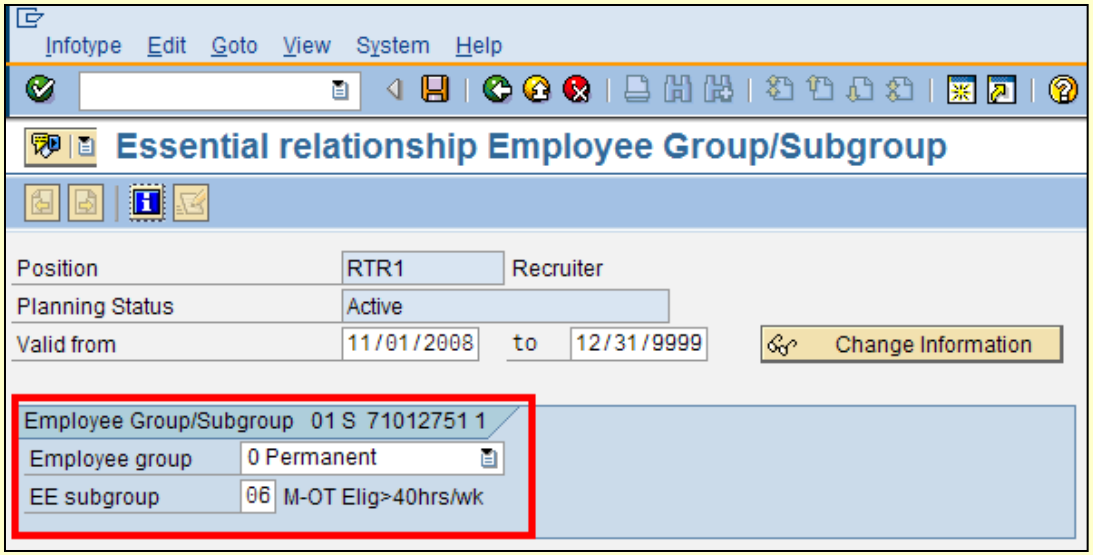


Note: Upon saving one description subtype, you are brought to the next description subtype. To skip any subtype, click (**Cancel**).

Essential relationship Employee Group/Subgroup

- The Employee Group/Sub-group infotype assigns the personnel structure to the position.

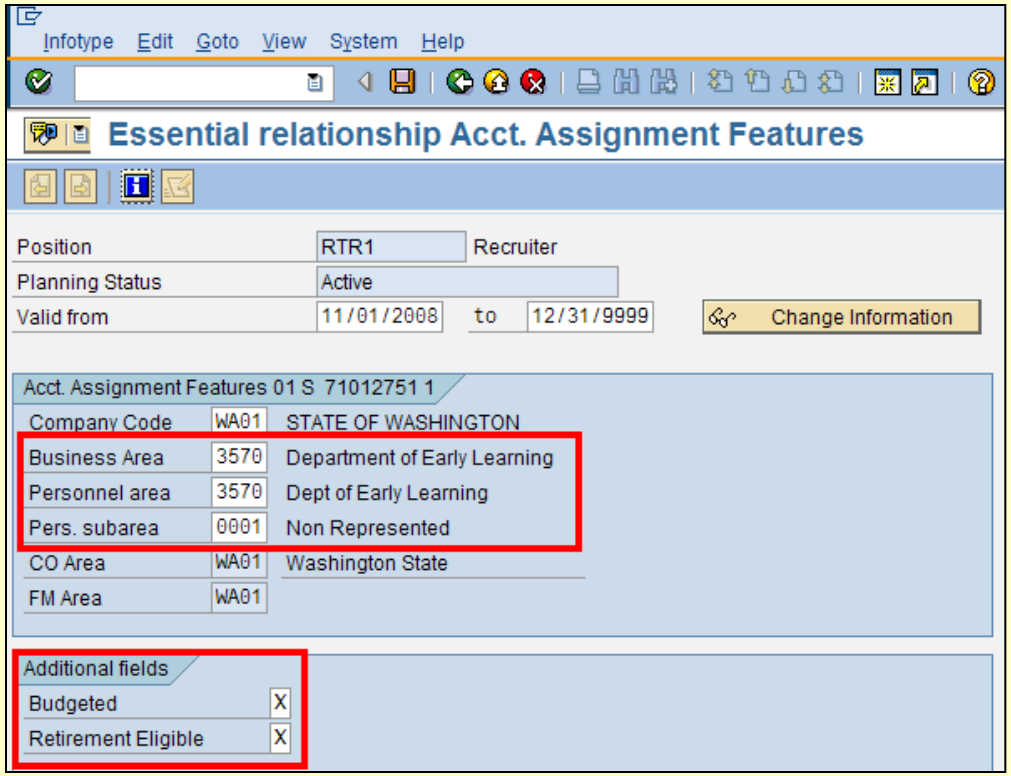
14. Fields to enter:
    - **Employee group**
    - **EE subgroup**
15. Click (**Enter**) to validate and click (**Save**) to save



Essential relationship Acct. Assignment Features

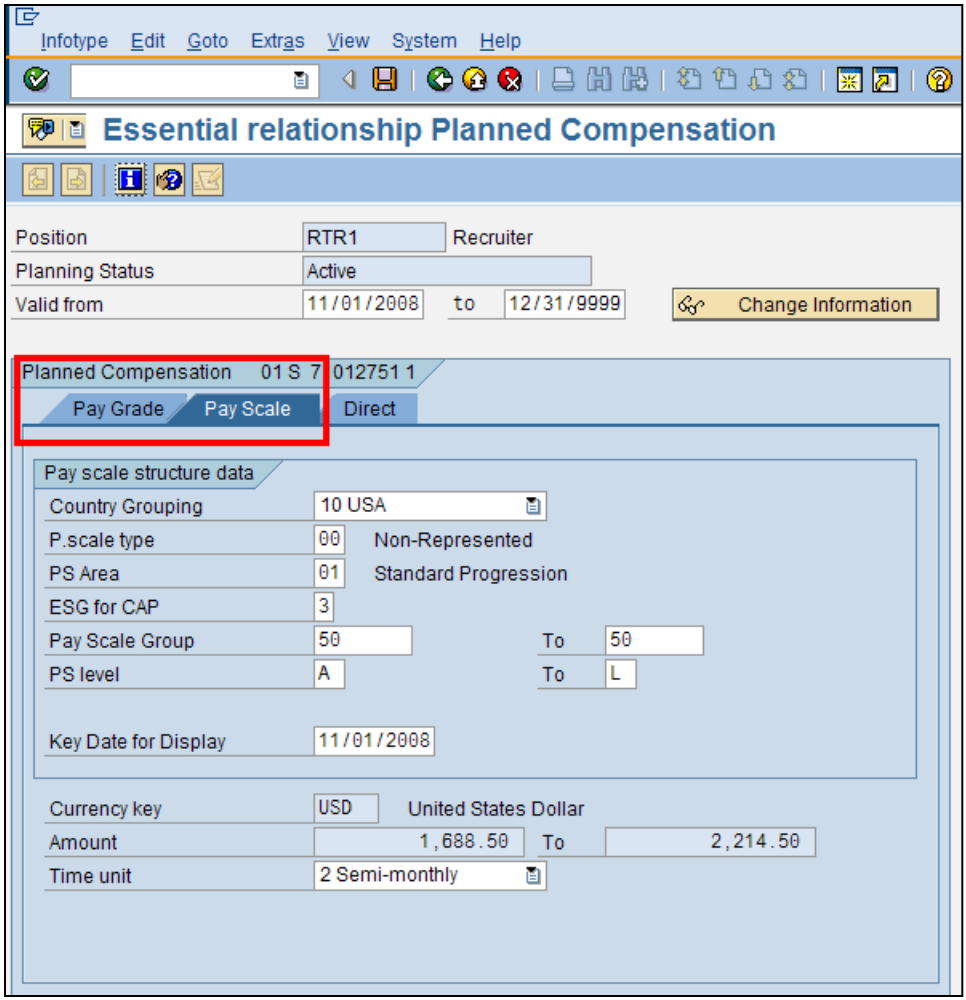
- The Essential relationship Acct. Assignment Features infotype assigns the Enterprise Structure and account assignment features to the position.

16. Fields to enter:
    - **Business Area**
    - **Personnel area**
    - **Personnel sub-area**
    - **Budgeted**
    - **Retirement Eligible**
17. Click (**Enter**) to validate and click (**Save**) to save

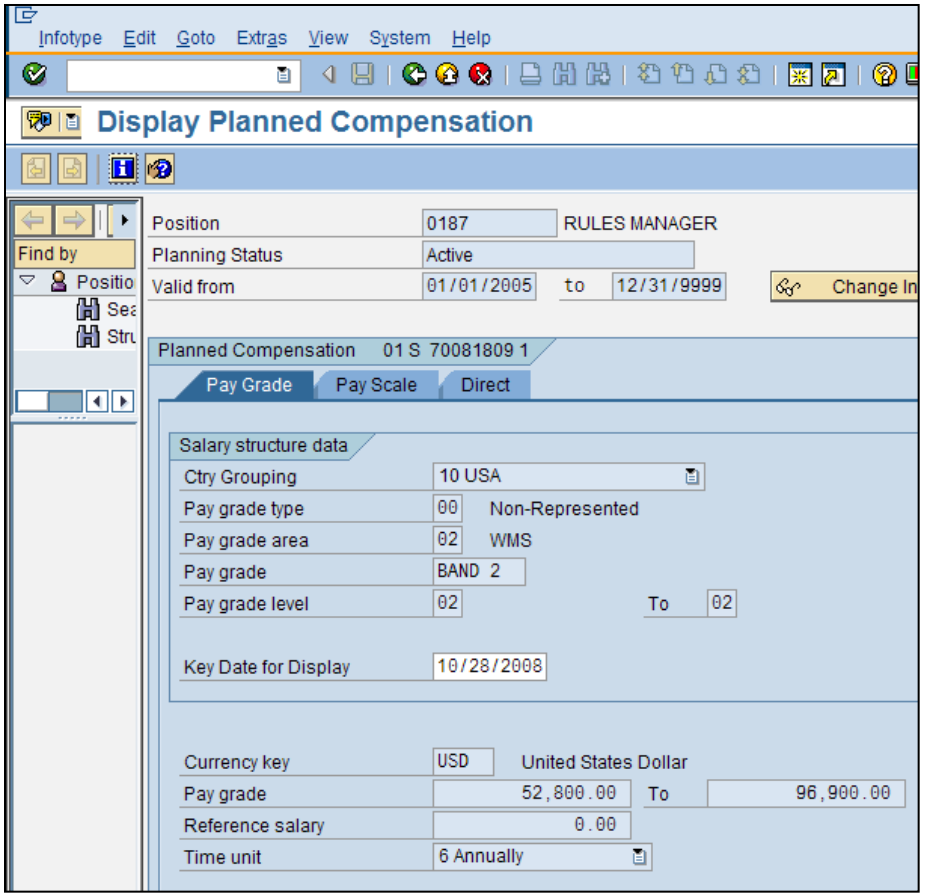


Essential relationship Planned Compensation

- The Planned Compensation infotype defaults from the job relationship as pay grade or pay scale.
- You will not be able to override the compensation details for the position.
- There are two tabs that are used for compensation:
  - Pay grade (bands)
  - Pay scale (steps)



Essential relationship Planned Compensation – Pay Grade

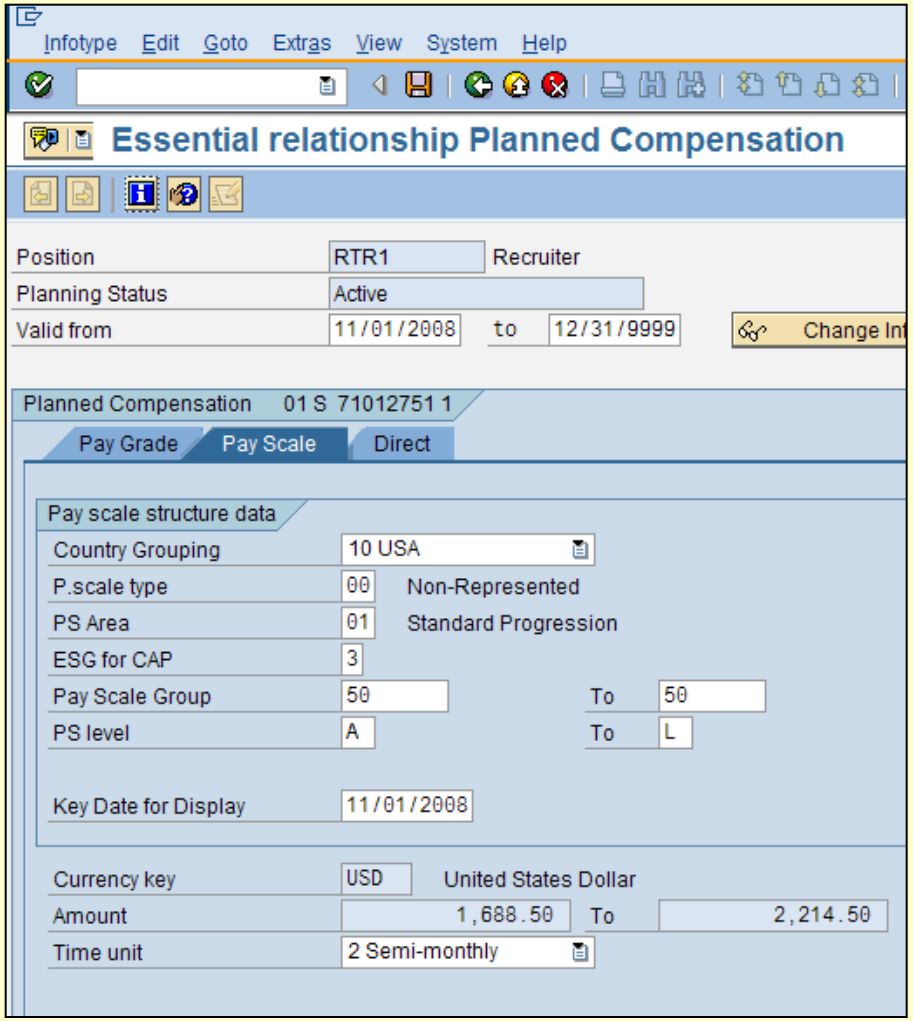


- Pay grade tab is used for the following types of positions and will default in based on the relationship with the job, Personnel Sub-area and EE subgroup:
  - WMS
  - Higher Ed Exempt
  - Students
  - Non Classified Elected Official
  - Non Classified Exempt Management Service
  - Non Classified Non Pay Scale
  - Non Classified Board Members

Essential relationship Planned Compensation – Pay Scale

- The Pay Scale tab is used for all other types of position and will default in based on the relationship with the job, Personnel Sub-area and EE Sub-group.

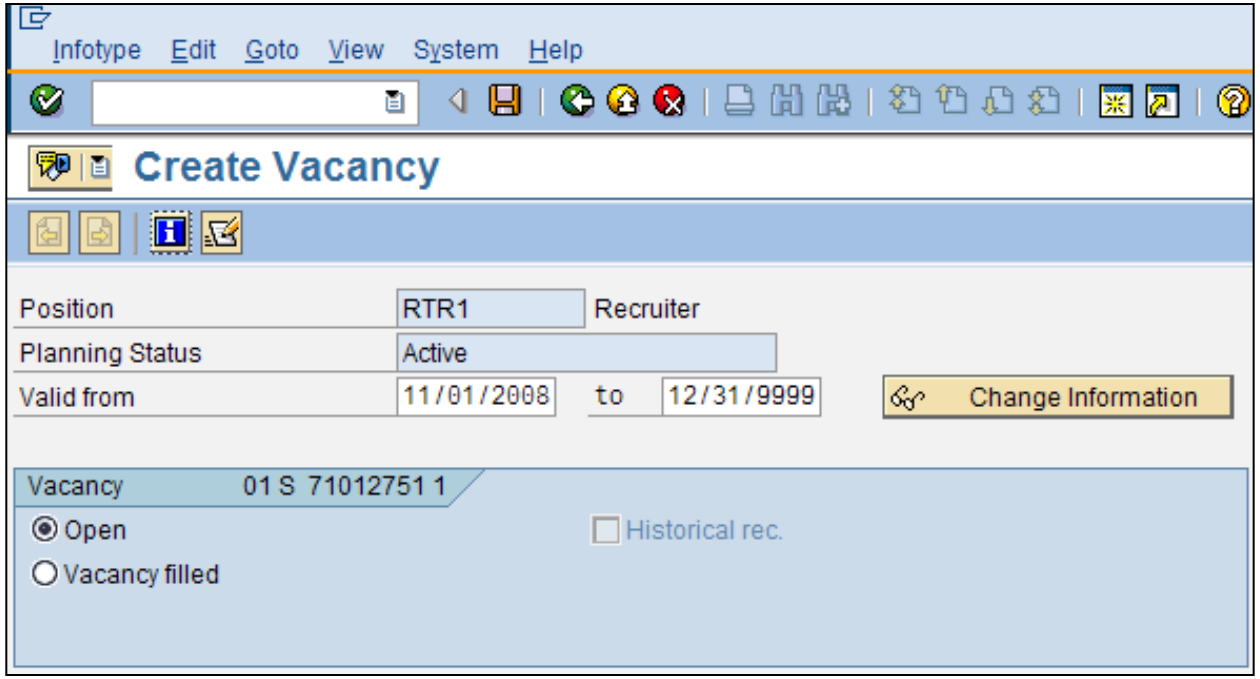
18. Once the information has been verified, click (**Enter**) to validate and click (**Save**) to save



Create Vacancy

- Use the *Vacancy* infotype to identify positions that are currently vacant or filled by running a report.
- You can create a *Vacancy* infotype record for a position that is occupied or unoccupied.

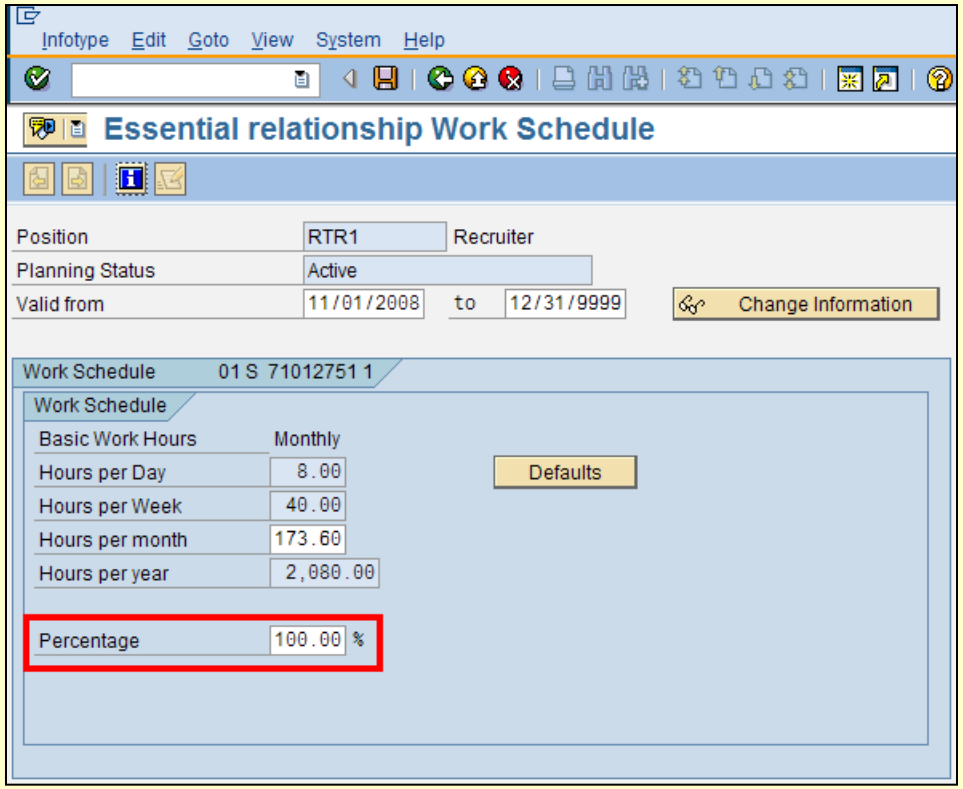
19. Click (**Enter**) and then click (**Save**).



Essential relationship Work Schedule

- The Work Schedule infotype defines the percentage for a position's work schedule, specifically part-time or full-time.

20. Field to enter
    - **Percentage**
21. Click (**Enter**) to validate and click (**Save**) to save

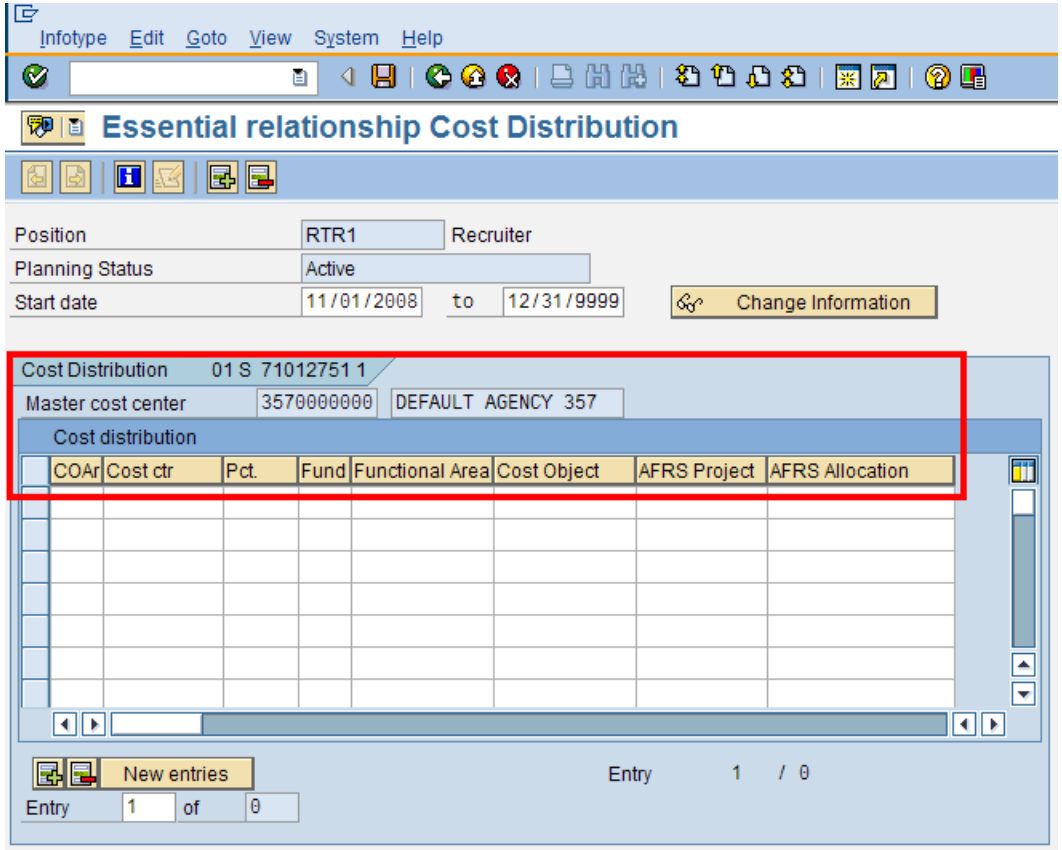


Note: The Defaults button can populate work schedule fields for full-time positions.

Essential relationship Cost Distribution

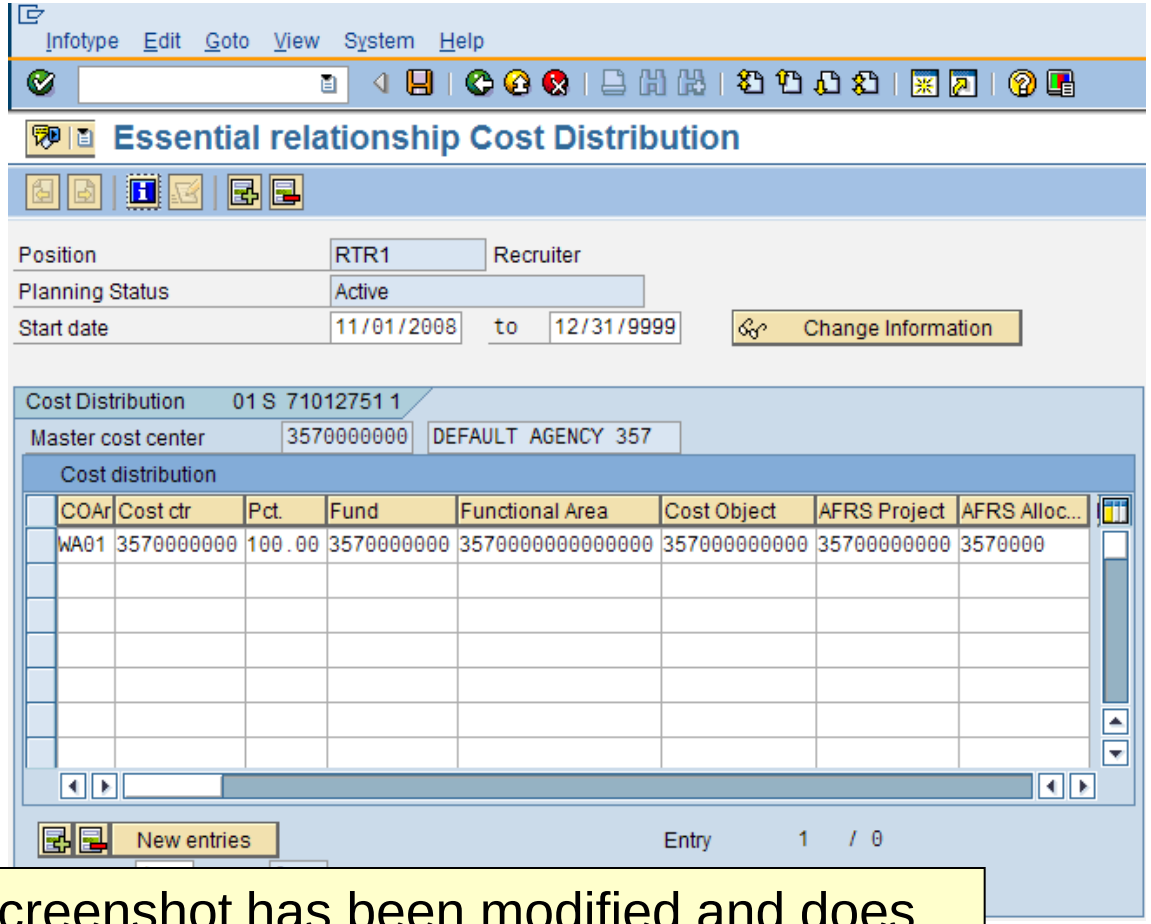
- The Cost Distribution infotype assigns the cost center to which the position's costs is incurred.

22. Fields to complete:
    - **Controlling area**
    - **Cost center**
    - **Percentage**
    - **Fund**
    - **Functional Area**
    - **Cost Object**
    - **AFRS Project**
    - **AFRS Allocation**



Essential relationship Cost Distribution – cont'd

23. Click (**Enter**) to validate and click (**Save**) to save



Note: The above screenshot has been modified and does not reflect all fields.

Cost Distribution Fields

HRMS Field Name	SOW Accounting Object	Code Calculation	Format	Example (DOP)
Cost Center	Organizational Index	Three character business area + AFRS Org. Index + 000	AAAXXXX000	111H110000
Fund	Appropriation Index & Fund	Three character business area + AFRS Fund + AFRS Appropriation Index + 0	AAAXXXXXX0	1114199020
Functional Area	Program Index	Three character business area + AFRS Program Index + 00000000	AAAXXXXX00000000	1110990000000000
Cost Object	Master Index	Three character business area + AFRS Master Index + 0	AAAXXXXXXXX0	111000130000
AFRS Project	Project, Sub Project & Phase	Three character business area + AFRS project + AFRS subproject + AFRS Project Phase	AAAXXXXXXXX	11191010000
AFRS Allocation	Allocation	Three character business area + AFRS Allocation Code	AAAXXXX	1110000

Legend:

A - Three Character business area

X- The AFRS accounting object embedded within the field

0- filler characters, usually 0

Example explanation:
111H110000 – Agency 111, AFRS Org Index H110, 000

HR WSD Personnel

Create Address

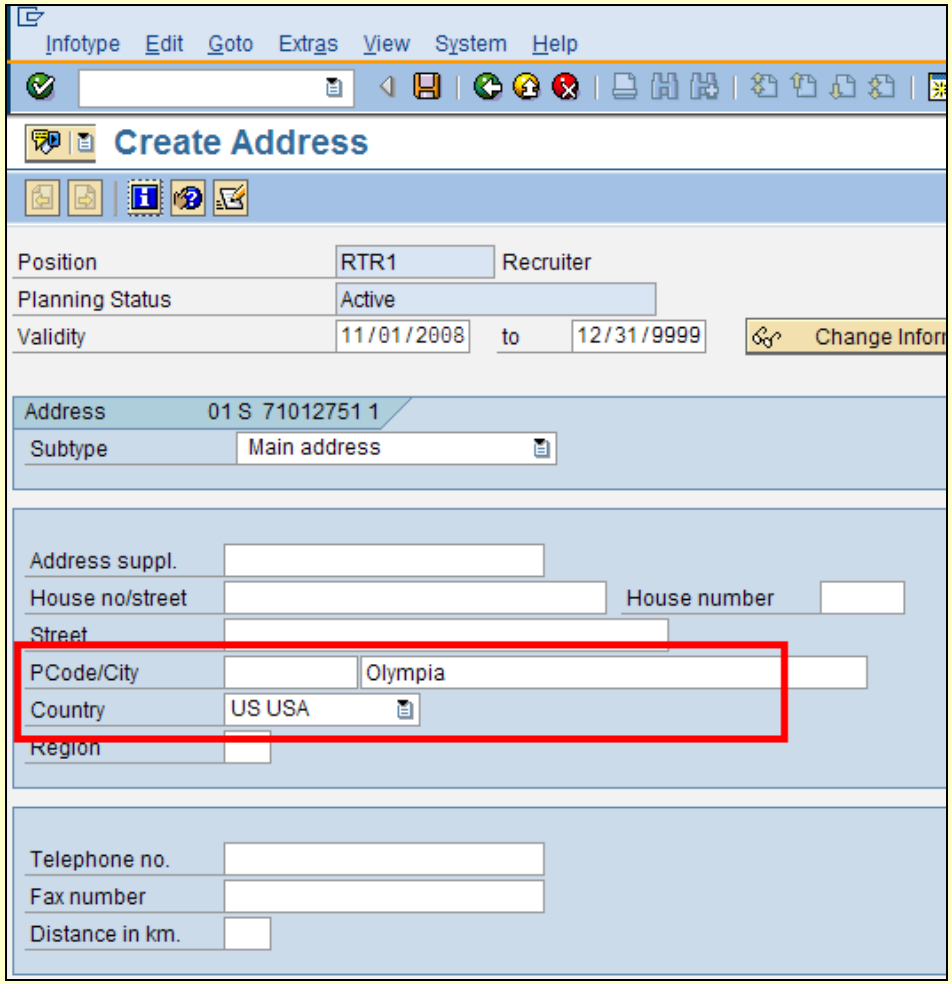
- The Address infotype stores the address for the position's location

24. Required fields to enter:
    - **City**
    - **Country**

- Optional fields include:
    - *Street address*
    - *Phone number*

- Data is used for reference purposes only

25. Click (**Enter**) to validate and click (**Save**) to save

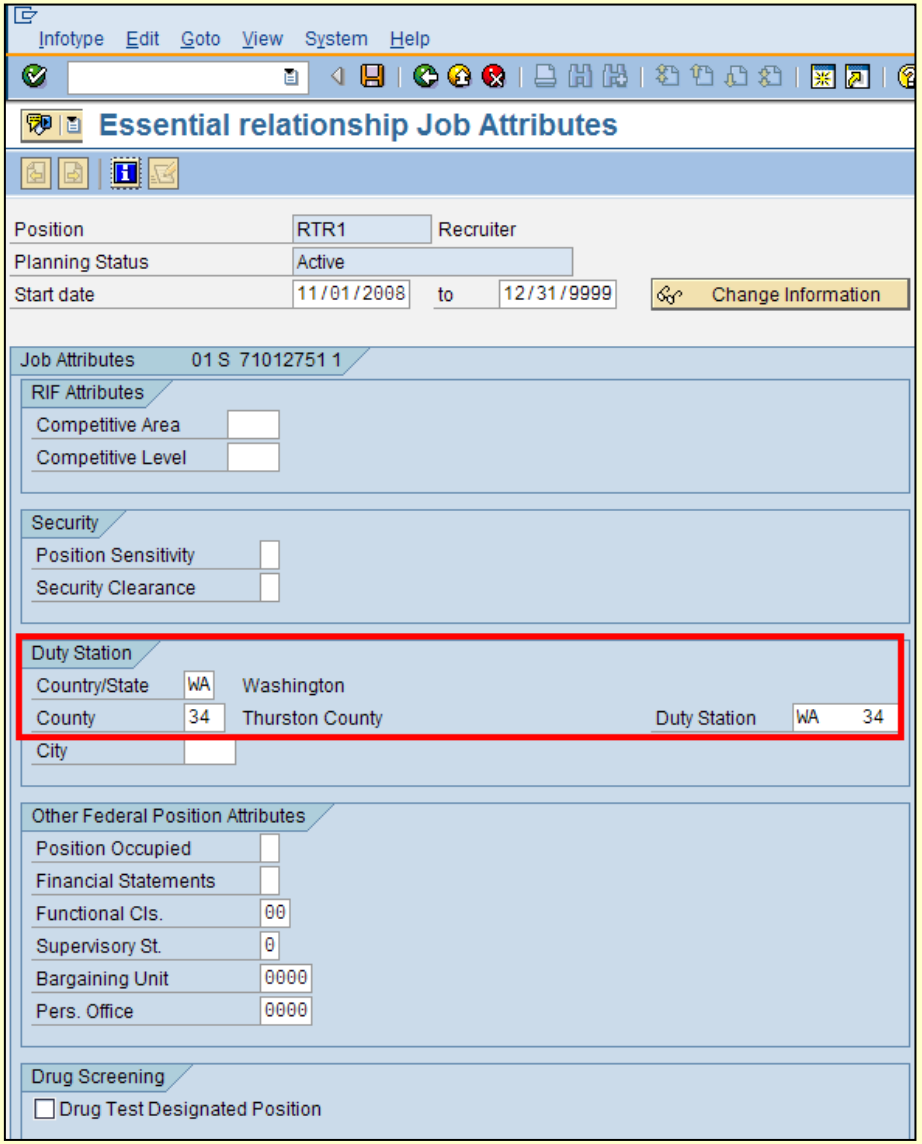


Essential relationship Job Attributes

- The Essential relationship Job Attributes infotype to stores the county that the position is created in

26. Field to Enter:
    - **Country/State**
        - Use Capital Letters (**WA**)
    - **County**
- Optional field to complete:
    - Security Clearance
- Data is used for reference purposes only

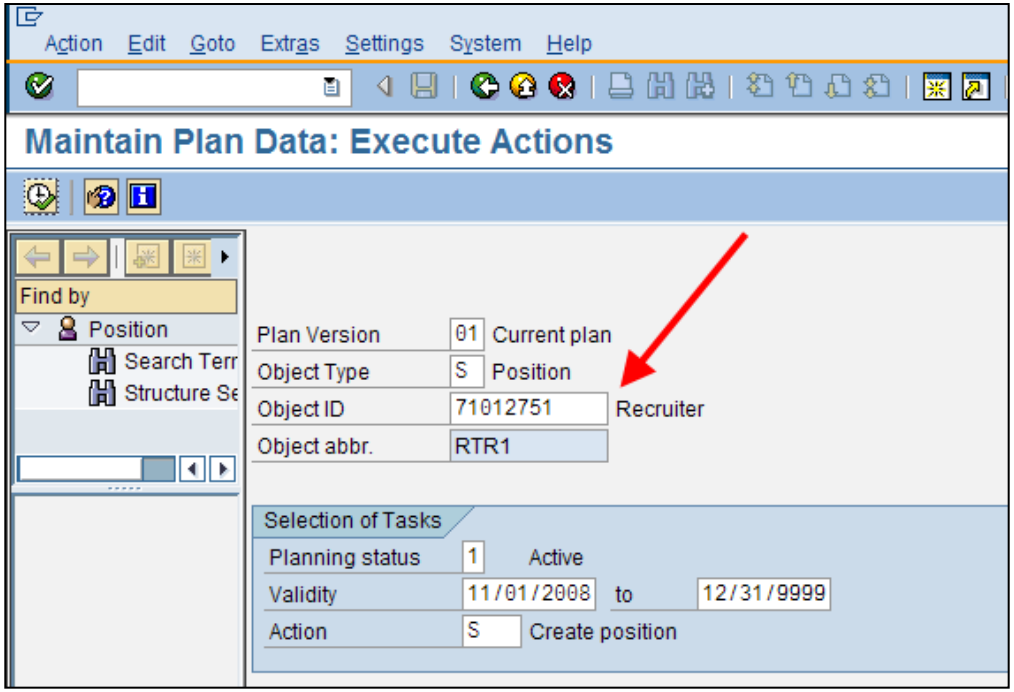
27. Click (**Enter**) to validate and click (**Save**) save



WSD Personnel

Maintain Plan Data: Execute Actions

- After saving the Essential relationship Job Attributes infotype, you will be taken back to the beginning of the Maintain Plan Data: Execute Actions.
- The HRMS Object ID number for the Position you created will be in the Object ID field.

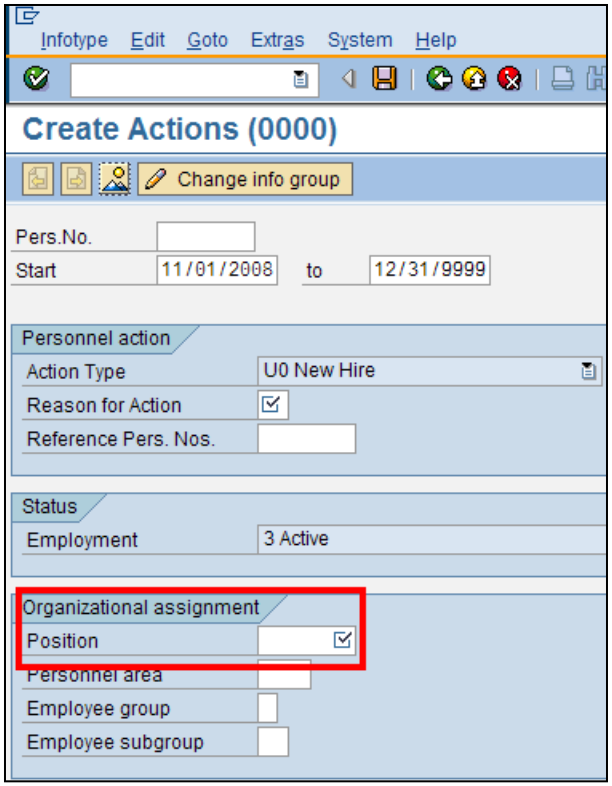


Possible Hand-offs

- After creating the position, contact your agency's Security Authorization Administrator to assign the HRMS security profile to the position if it has roles that require HRMS access.
- The Personnel Administrator Processor may also need to be contacted if the position will be used for a hire action.

Possible Hand-offs – cont'd

- During the a Hire action (**PA40**), a position is entered on *Actions* (0000). Once the infotype has been validated, the default values are distributed through the hire action's infotypes.

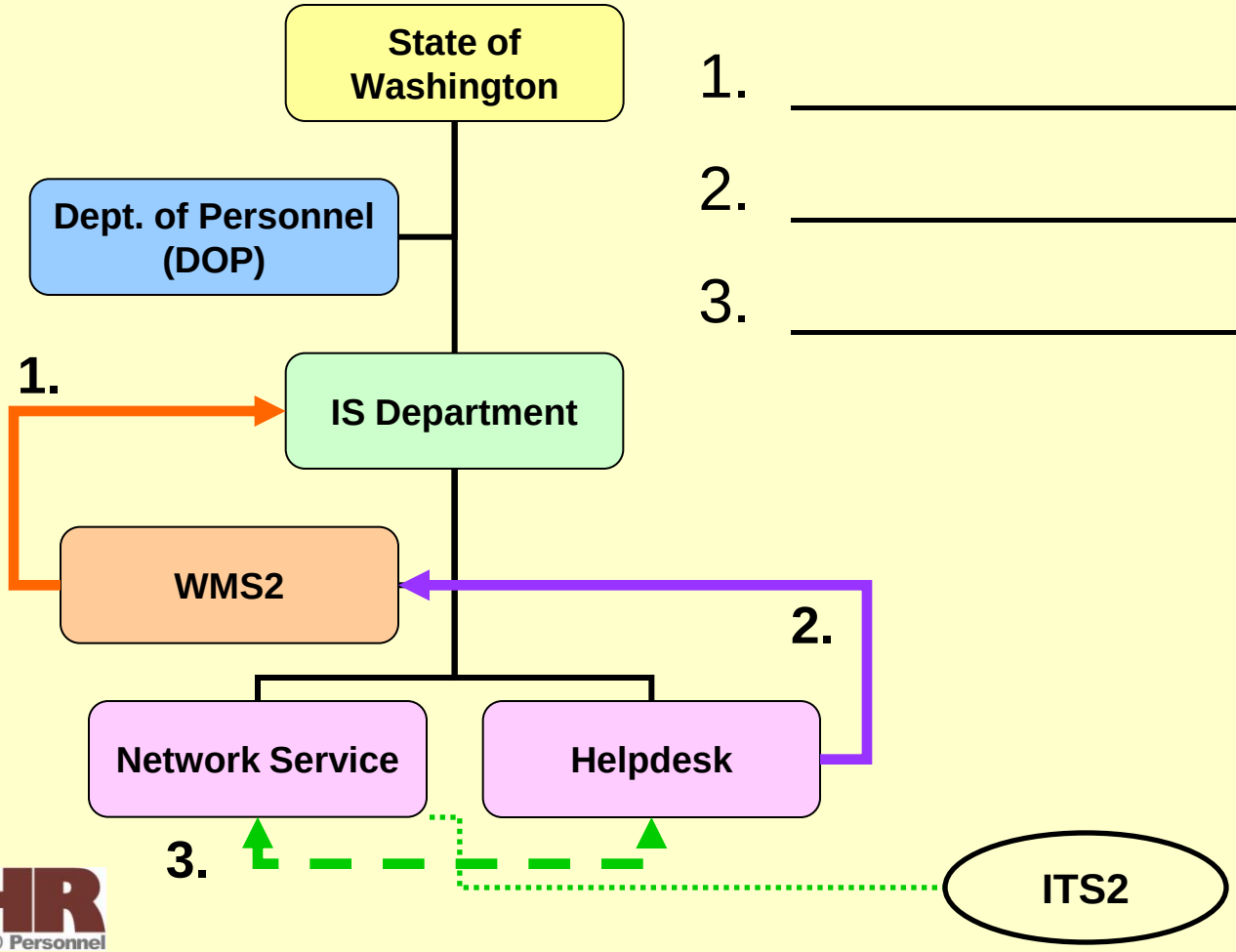


HRMS Activity

Create Position Action Walk-through and Exercise

Review Questions

1. List the 3 types of relationships established during the Create Position action (PP03).



1. _____

2. _____

3. _____

Review Questions

2. Match the relationships:

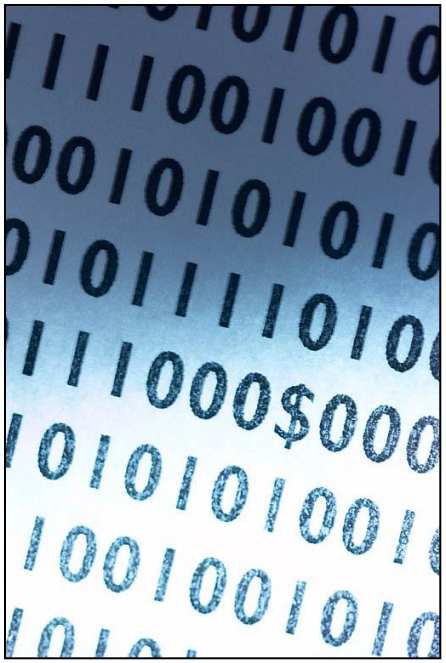
1) Position to Organizational Unit	a) A002 – Reports (line) to
2) Position to Job	b) A003 – Belongs to
3) Position to Position	c) B007 – Is described by

Section 3b: Maintain Positions

- Once a position has been created, it can be modified using the Maintain Position action (**PO13**)
- The following infotypes can be modified:
  - *Object* (1000)
  - *Relationships* (1001)
  - *Description* (1002)
  - *Planned Compensation* (1005)
  - *Vacancy* (1007)
  - *Acct. Assignment Features* (1008)
  - *Work Schedule* (1011)
  - *Employee Group / Subgroup* (1013)
  - *Cost Distribution* (1018)

Organizational Management Transactions

- **Position**
  - Create Position **PP03**
  - Display Position **PO13D**
  - Maintain Position **PO13**

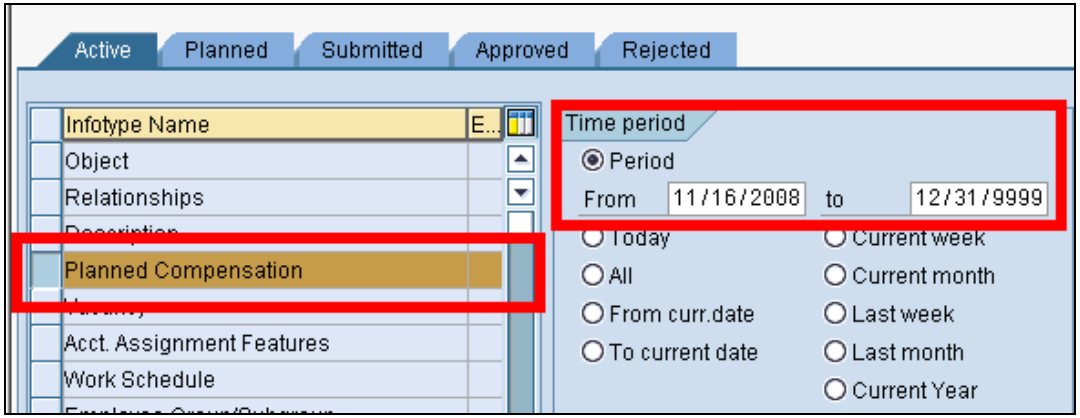


Maintain Function Keys

- Click (**Create**) to create a new record
- To update the infotype and record the history, click (**Copy**)
  - The new start date of the record will be used for the current information. This will end date the existing record and reduces data entry.
- To change/correct the infotype with no history, click (**Change**)

Planned Compensation Updates

- When updating a position's Planned Compensation, use the Create function.
- Enter the effective date of the change in the Time Period section before clicking on (**Create**) on the Application tool bar.
- Pay close attention to the Pay Scale Type (non-represented vs. represented). It will default information based on the job relationship, Personnel Sub-area and EE Sub-group.



Object Start Dates

Scenario 1:

- If a position is created with the incorrect start date such as a future date, the Object infotype can be updated using the (**Copy**) function along with the other affected infotypes.
  - Once updated, the incorrect date will be overridden.

Scenario 2:

- If a position is created with a past start date, the date cannot be changed, but can be deleted.
  - A position can be deleted if it has not been filled.

HRMS Activity

Maintain Position Exercise

Scenario 3c: Delimit Positions

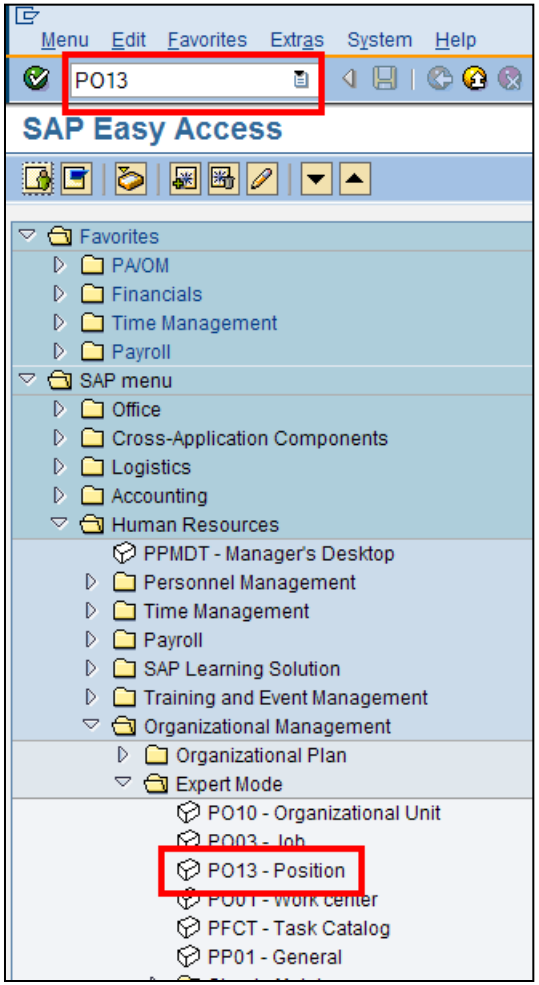
- When you delimit a position, all relationships will be delimited.
  - Review the *Relationships* Infotype to verify that there are no active relationships with positions or people that report to the position you are delimiting.

Delimit Positions – cont'd

- You automatically delimit individual infotype records when you create and save a copy of an infotype record.
- You can also delimit the entire position if it is no longer needed due to reorganizations or for other business reasons.
  - This will delimit the position's attributes and relationships.

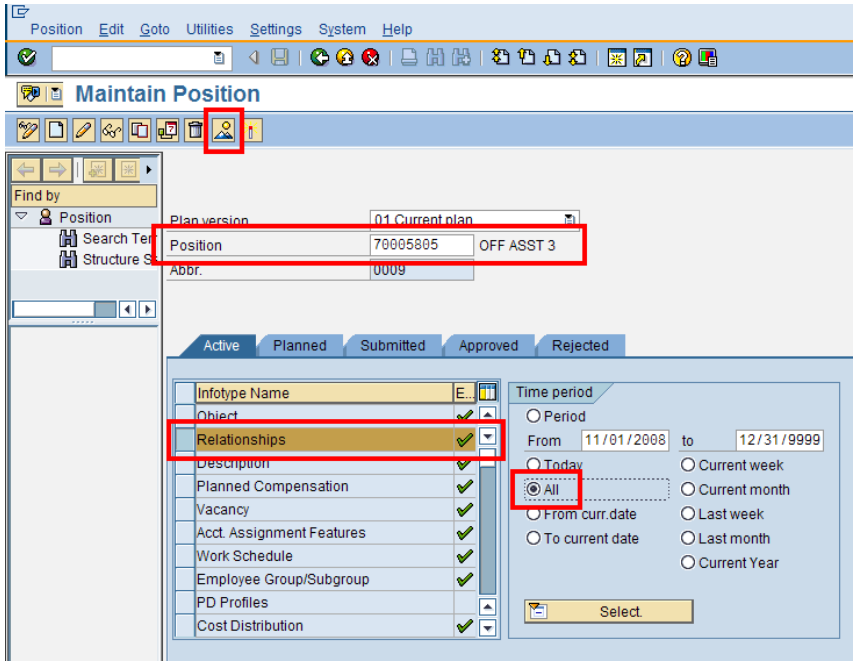
Delimit a Position action

1. To delimit a position use the Maintain Position action:
   - Follow the menu path Human Resources → Organizational Management → Expert Mode → Position
   - Or transaction code **PO13** in the **Command** field



Delimit Position(s)

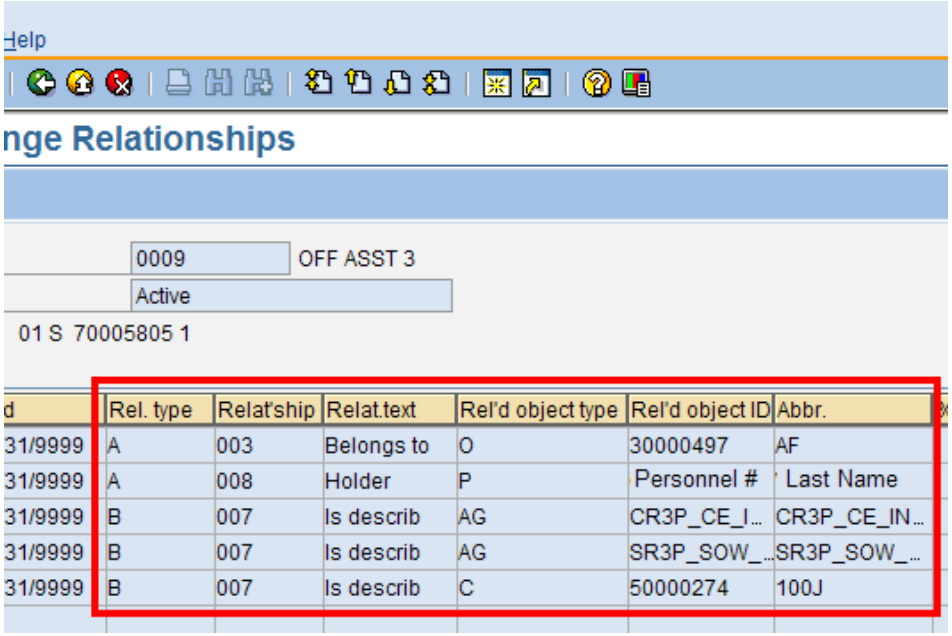
2. To view position relationships, enter the position number and click (**Enter**) to validate
3. In the Time period field, click the radio button for ‘All’
4. Click the gray box to the left of Relationships
5. Click (**Overview**) for an overview of all actions associated with *Relationships* (1001)



Delimit Position(s)

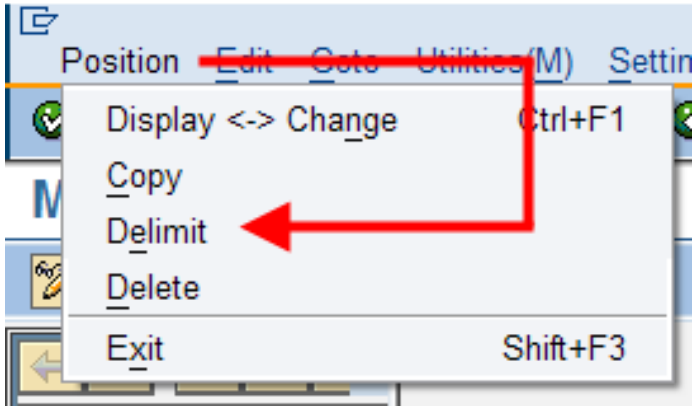
- You can determine the type of relationship by viewing the relationship type and the relationship object type.
  - Example :
    - A003 Belongs to O (Organizational Unit)
    - B002 Is line supervisor of S (Position)
    - A008 Holder (Person)

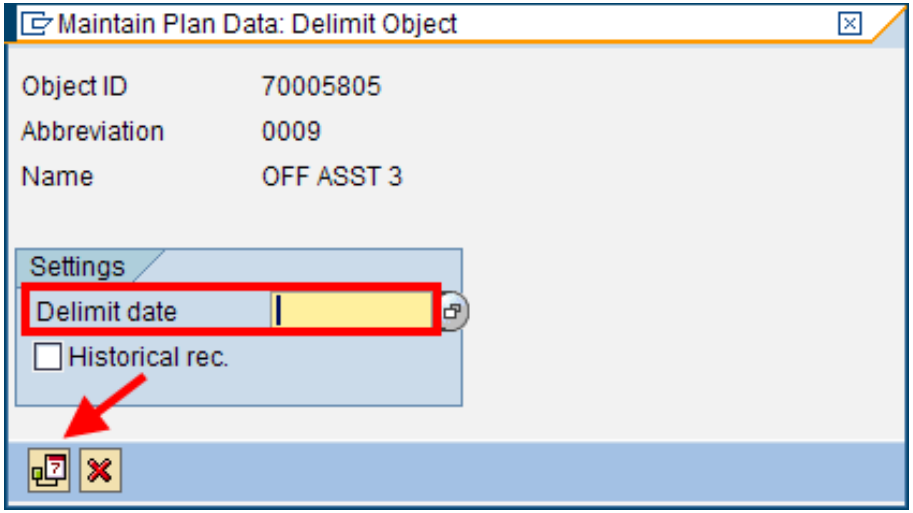
6. To return to Maintain Position, click (**Exit**) to exit



Delimit Position

7. On the Menu Bar select Position → Delimit from the Menu bar
8. A Maintain Plan Data Delimit Object box will Pop-up
9. Enter the Delimit date
10. Click **(Delimit Record)**





Note: Do not check the Historical rec. box when delimiting. If checked, the record cannot be changed.

HRMS Activity

Delimit Position Exercise

What else do I need to know?

- See OLQR User Procedures:
  - Position Action Create
  - Position_Delimit
  - Position Compensation – Maintain
  - Position Description – Maintain
  - Employee Group and Sub-group to Position_Create and Maintain

Section 4: Organizational Management Reports

Organizational Management Reports

Upon completion of this section you will be able to:

- List and run some of the organizational management reports.
- Describe how the reports may be used.

Reporting in HRMS

- HRMS integration provides the capability to run reports within Personnel Areas (agencies or sub-agencies).
- Generating reports allows you to process information quickly to support decision making.
- Ability to export and manipulate “real-time” data.

HRMS Customized Reporting - Transaction Code Map

Functional Area

HR = Human Resources

Z HR _ RPT PY 126

"Z" = Custom

"RPT" = Report

Report GAP #

The Transaction Code used for this example is the Payroll Posting Report.

Functional Areas:

PY – Payroll

PA – Personnel Administration

OM – Organizational Management

TM – Time Management

BN - Benefits

HRMS Reporting – OLQR Resources

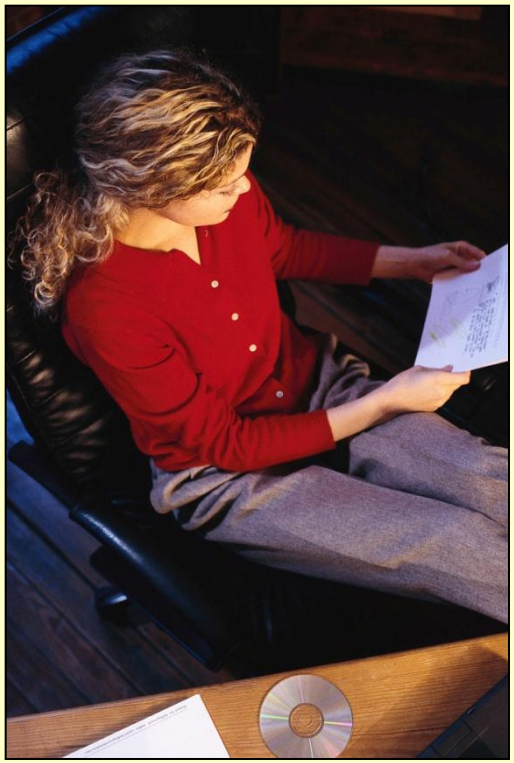
Visit the OLQR website (http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/) for the following:

- HRMS Reports
  - Variants_Create and Retrieve
- Job Aids A-Z

Visit the HRMS Support website (http://www.dop.wa.gov/HRMS/CustomerSupport/) for a list of all Statewide variants.

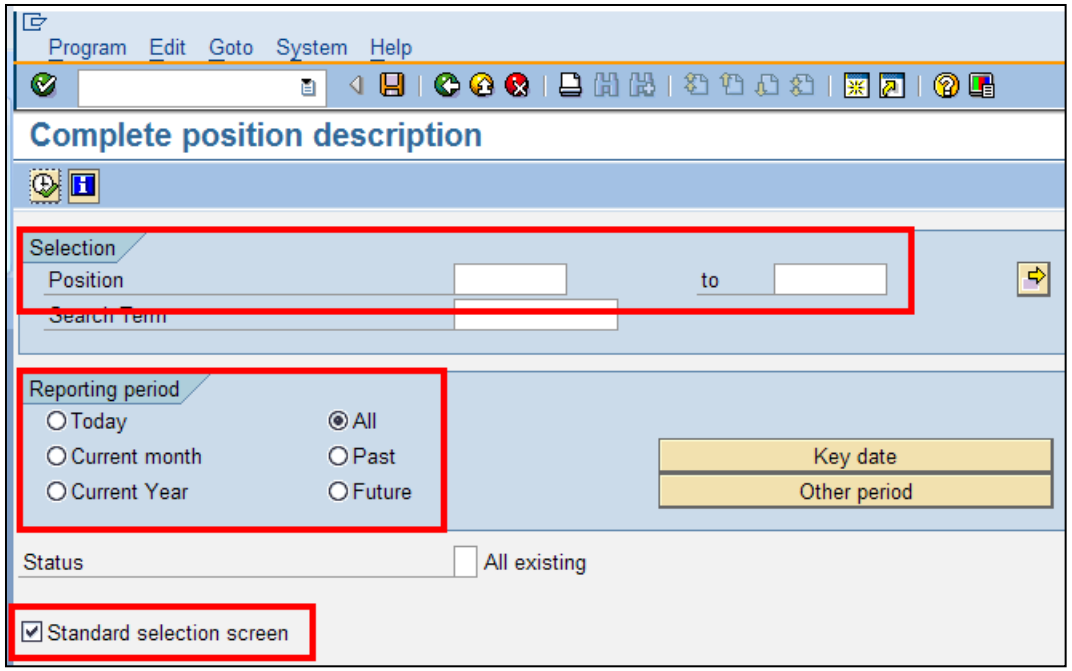
Complete Position Description

- Use the report to view a summary of select infotype records that are created for a position.
  - General description
  - In-training
  - JVAC
  - Shift Designation
- Run the report when analysis on Position Description is needed.
- Access the report using the transaction code **S_AHR_61016511**.



Complete Position Description

1. As required, enter the Position number (use matchcode for ease of selection – see the *Additional Information* section for further instruction)
2. In the reporting period, select the radio button 'All'
3. Click 'Standard selection screen' box to customize the display options
4. Click (Execute)

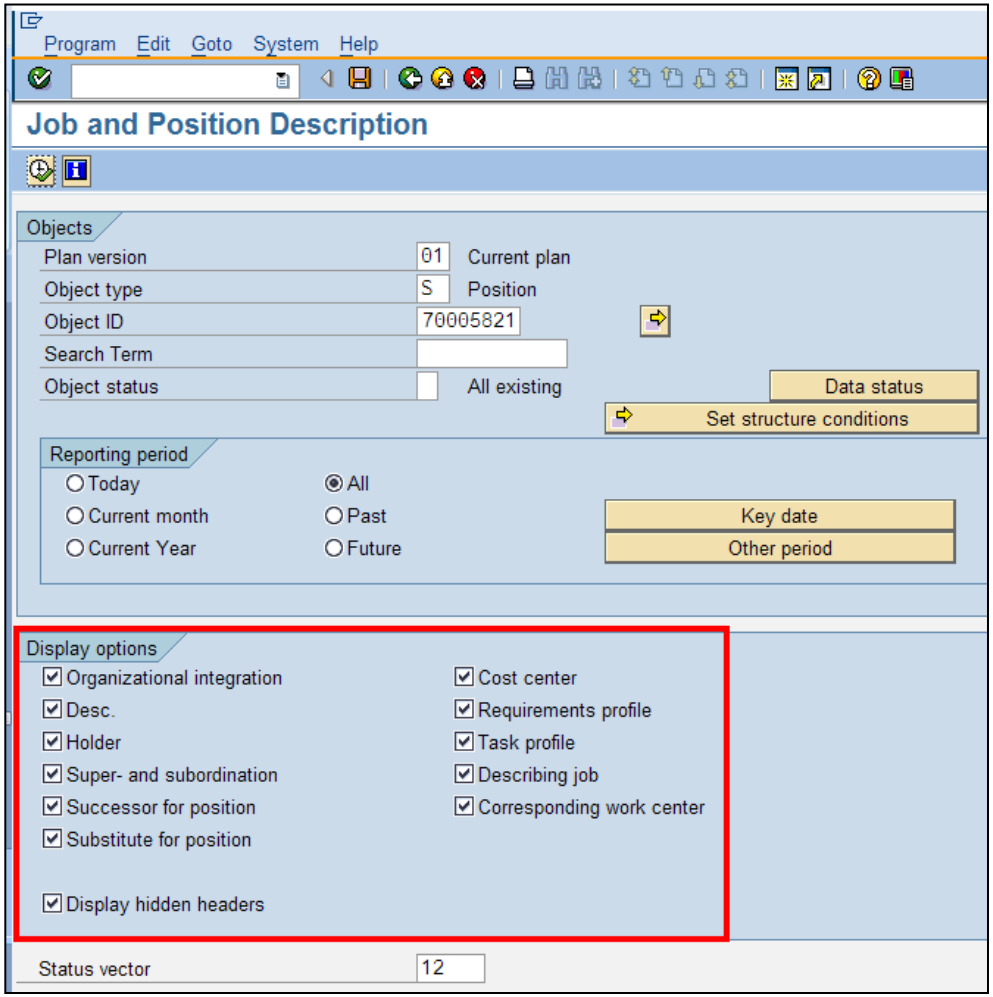


Note: When selecting more than one object, utilize the (Select Subtree) function found in the Structure Search.

Complete Position Description (S_AHR_61016511)

- You can customize the infotypes that display on the report by checking the desired boxes in the *Display options* field.

5. Click **(Execute).**



Complete Position Description

List Edit Goto View System Help

Position Description

Plan version : 01 Current plan Status vector: 12 Reporting period: 01/01/1900 - 12/31/9999

Position
S 70005821 ADM ASST 3

Approved hours per month — Position S 70005821 ADM ASST 3

Approved hours
173.60

Organizational integration — Position S 70005821 ADM ASST 3

Key	Object Description
O 30000493	ADMINISTRATIVE SERVICES

Desc. — Position S 70005821 ADM ASST 3

Description
In Training: In Training
Shift Designation: 1-Days

Holder — Position S 70005821 ADM ASST 3

Description
Position unoccupied since:12/31/9999 Position has been vacant since:07/01/2007

Describing job — Position S 70005821 ADM ASST 3

Key	Object Description
C 50000286	SECRETARY LEAD
C 50000286	SECRETARY LEAD
C 51000780	ADMINISTRATIVE ASSISTANT 3

HRMS Activity

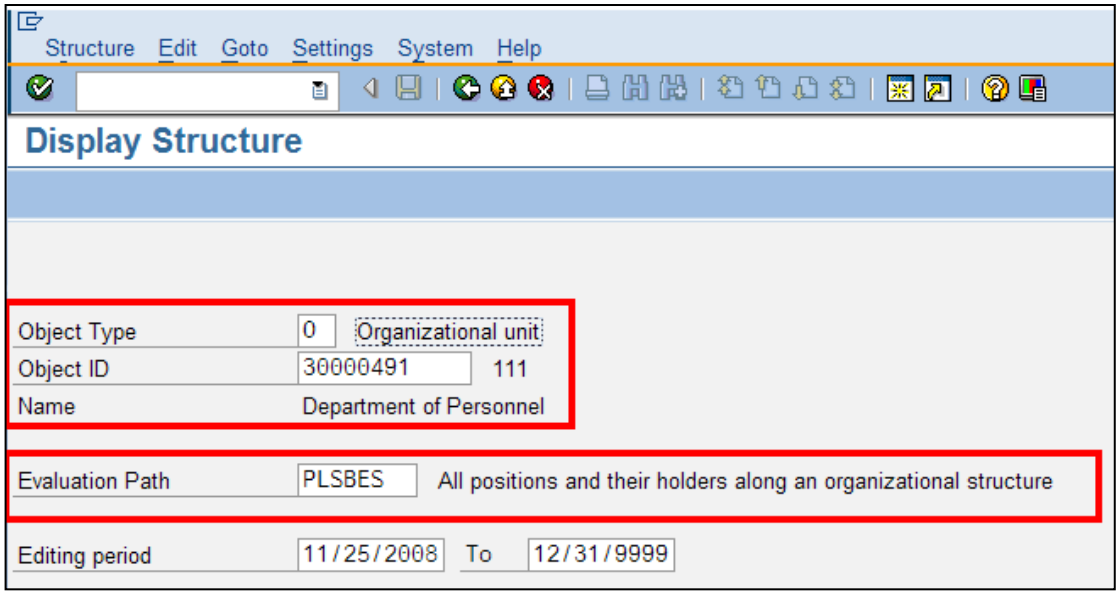
Complete Position Description Report Walkthrough

Display Structure

- Use the report to display the organizational plan based on the object type and evaluation path entered.
  - For example, this report can be used to display all jobs, persons, organizational units, and position based on the relationship type.
    - Position to Person
    - Organizational Unit to Cost Center
- Run the report when analysis is needed.
- Access the report using the transaction code **PPSS**.

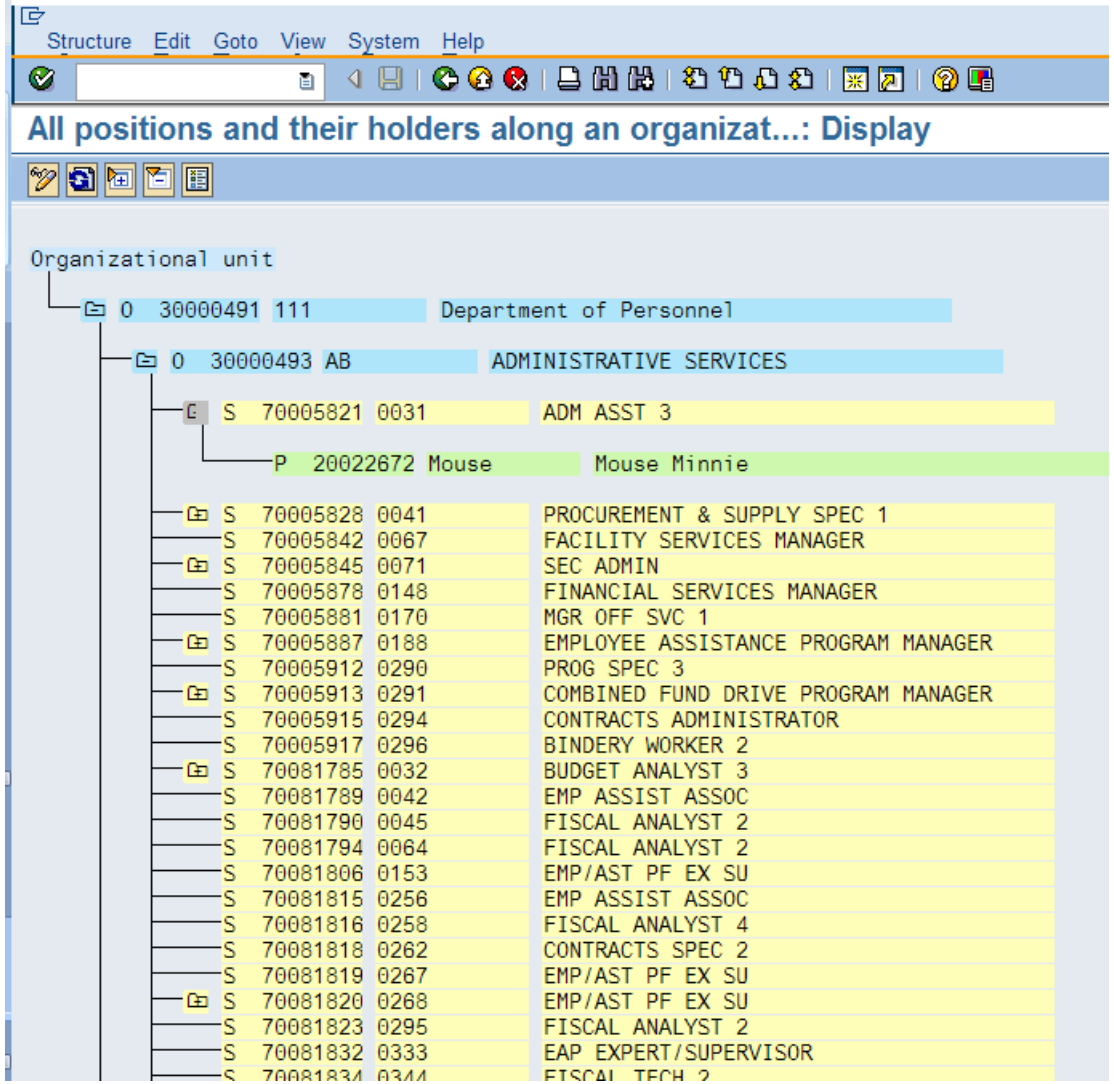
Display Structure

- As required, complete the following fields:
  - Object type
    - O – Org Unit
  - Object ID
    - Use matchcode
  - Evaluation Path
    - PLSBES
  - Editing period



- Click (**Enter**)

Viewing Results: Display Structure

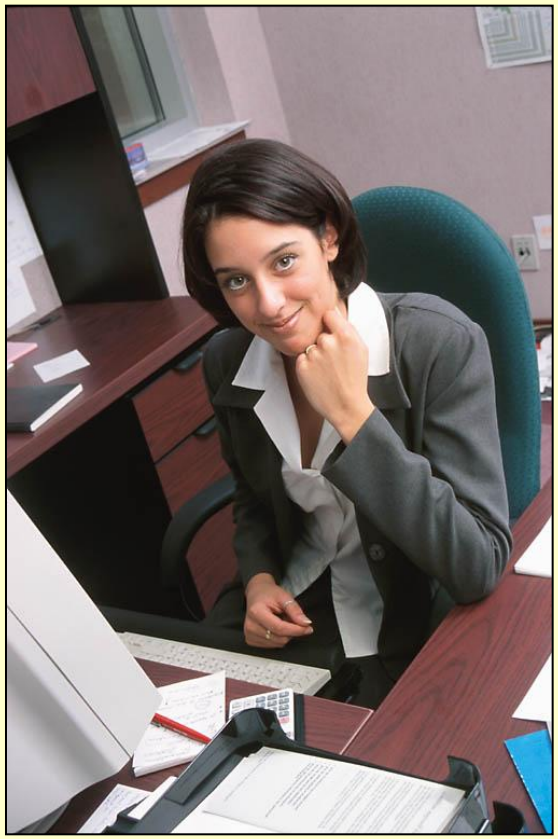


HRMS Activity

Display Structure Walkthrough

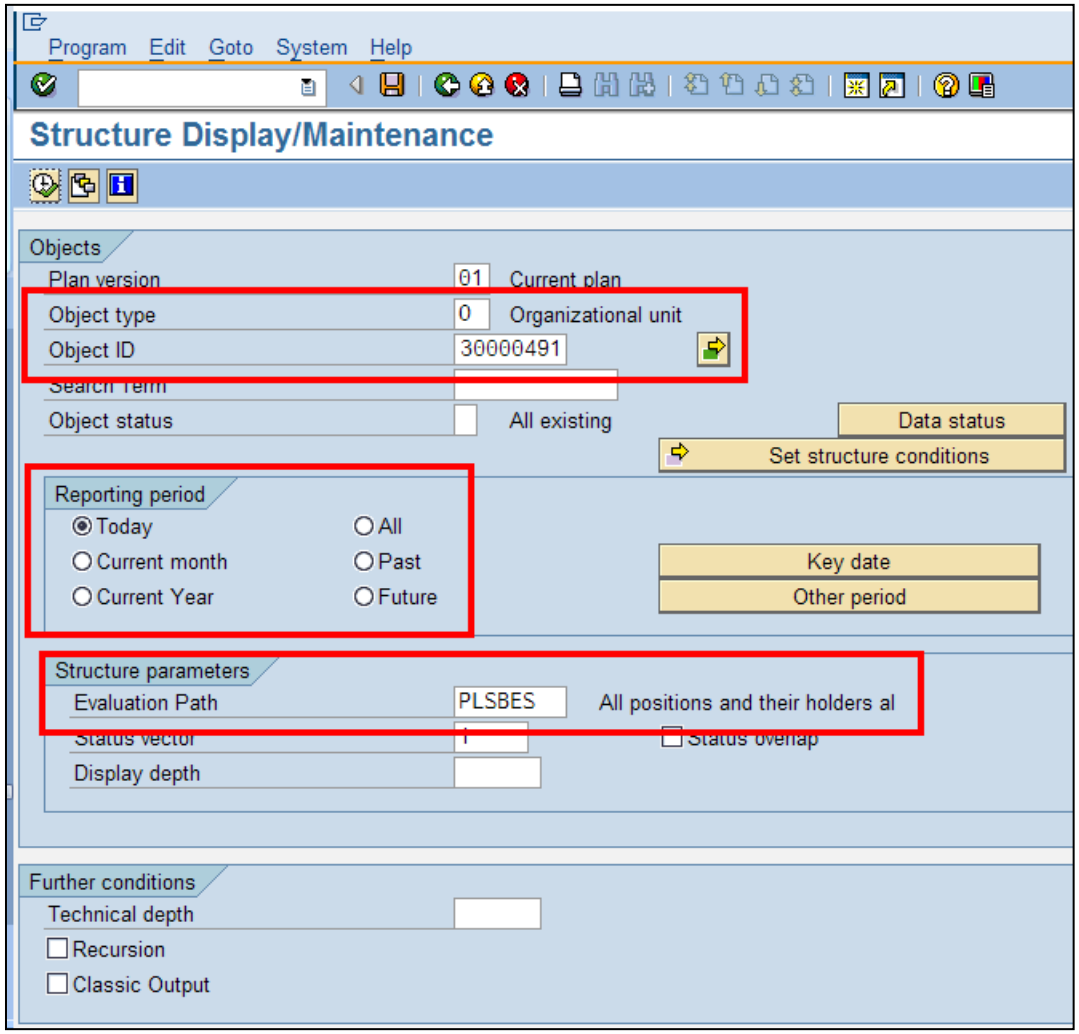
Structure Display/Maintenance

- Use the report to display the organizational plan based on the object type and evaluation path entered.
  - For example, this report can be used to display all jobs, persons, organizational units that are assigned to a specific position.
- Run the report when analysis is needed.
- Access the report using the transaction code **S_AHR_61016528**.

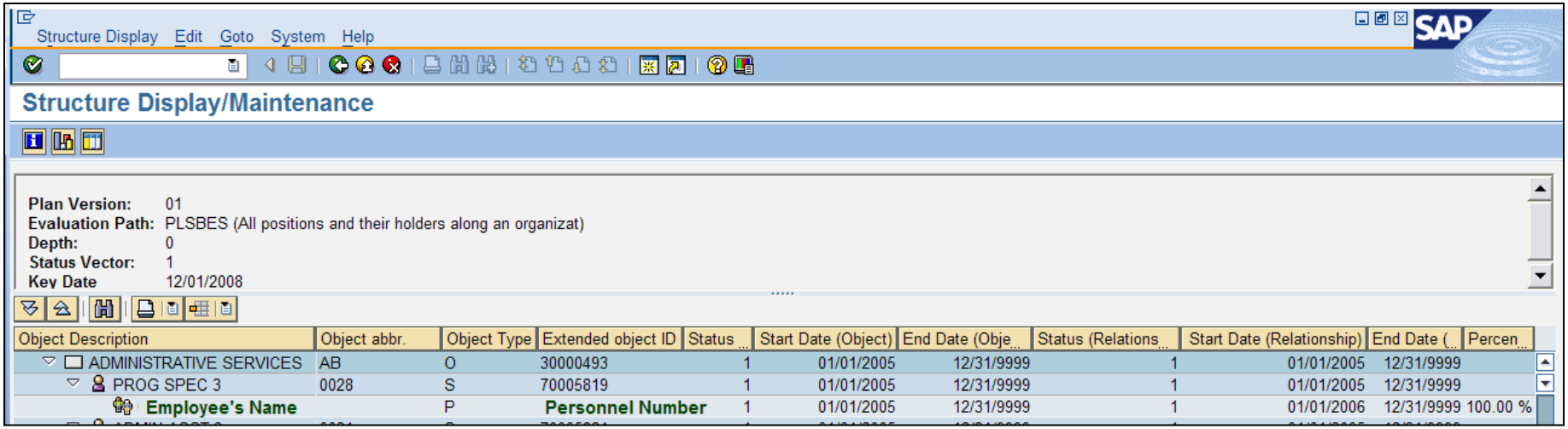


Structure Display/Maintenance

- As required, enter the following fields:
  1. Object type
     - O Org Unit
  2. Object ID
     - (use matchcode)
  3. Select a Reporting period
  4. Evaluation Path
     - PLSBES
  5. Click (**Execute**)



Viewing Results: Structure Display/Maintenance

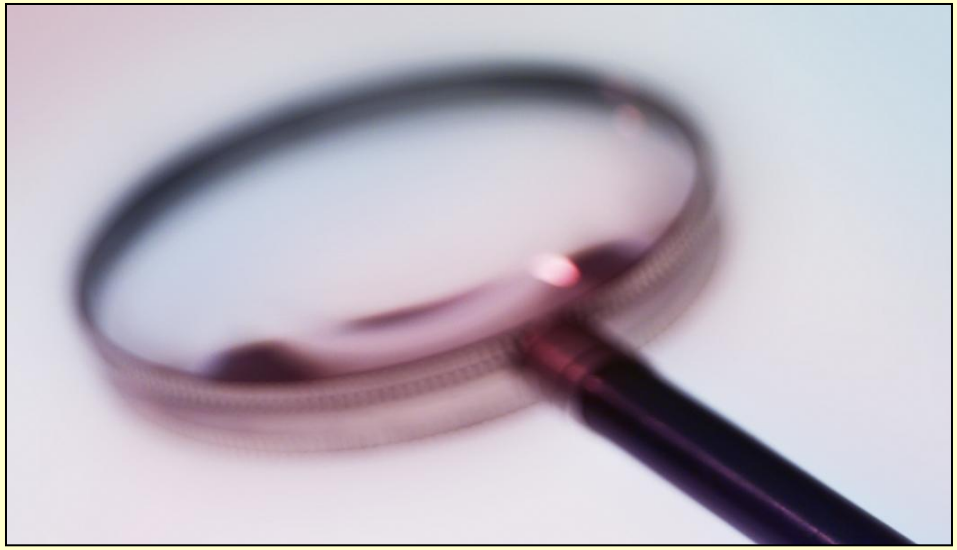


HRMS Activity

Structure Display/Maintenance Walkthrough

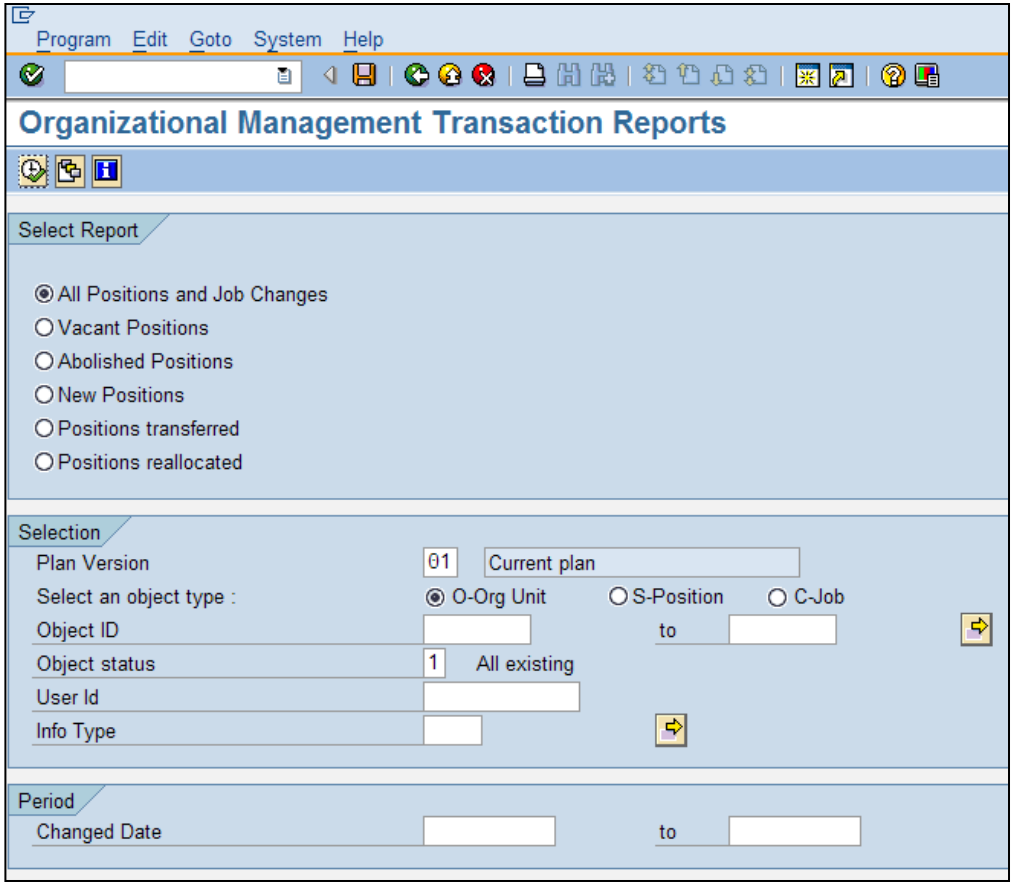
Organizational Management Transaction Reports

- Use the report to run audits in Organizational Management.
- Run the report when analysis is needed.
- Access the reports using the transaction code **ZHR_RPTOMN01**.

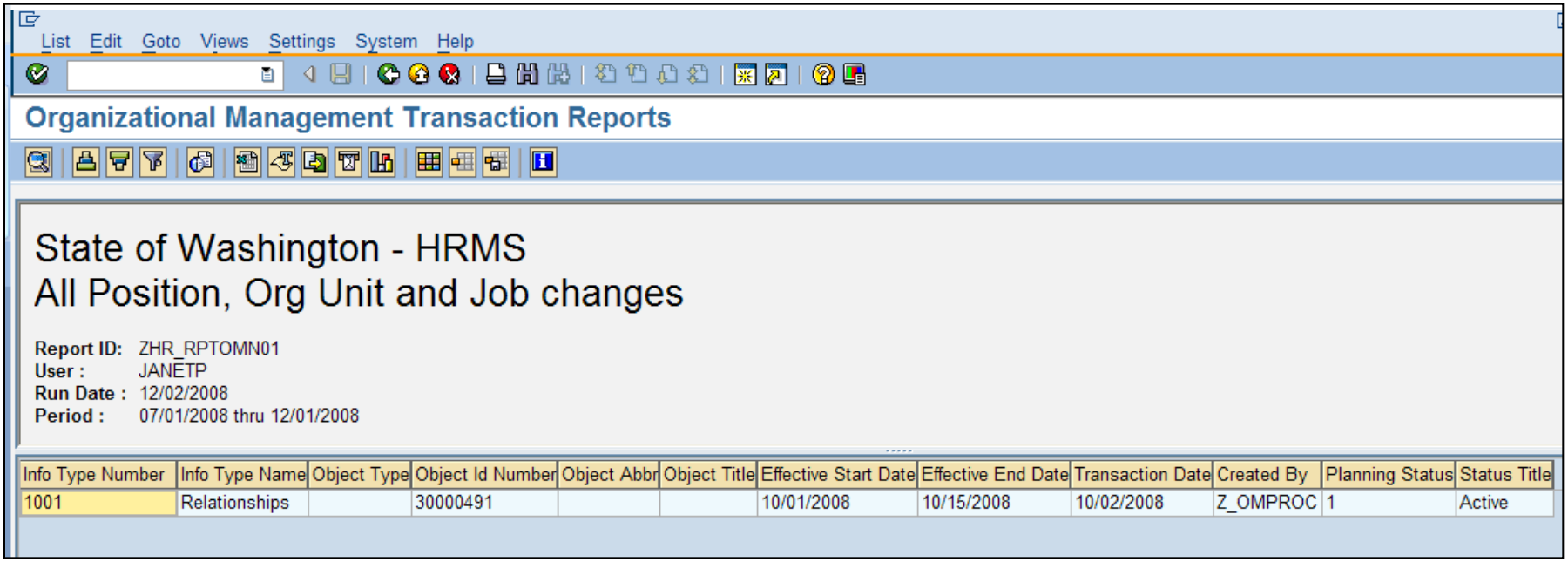


Organizational Management Transaction Reports

- In the Select Report section, click the radio button to select the report to run.
- As required, complete the following:
  - Select an object type
  - Object ID
  - Period
- In the Period section, enter the Changed Date
- Click (Execute).



Organizational Management Transaction Reports



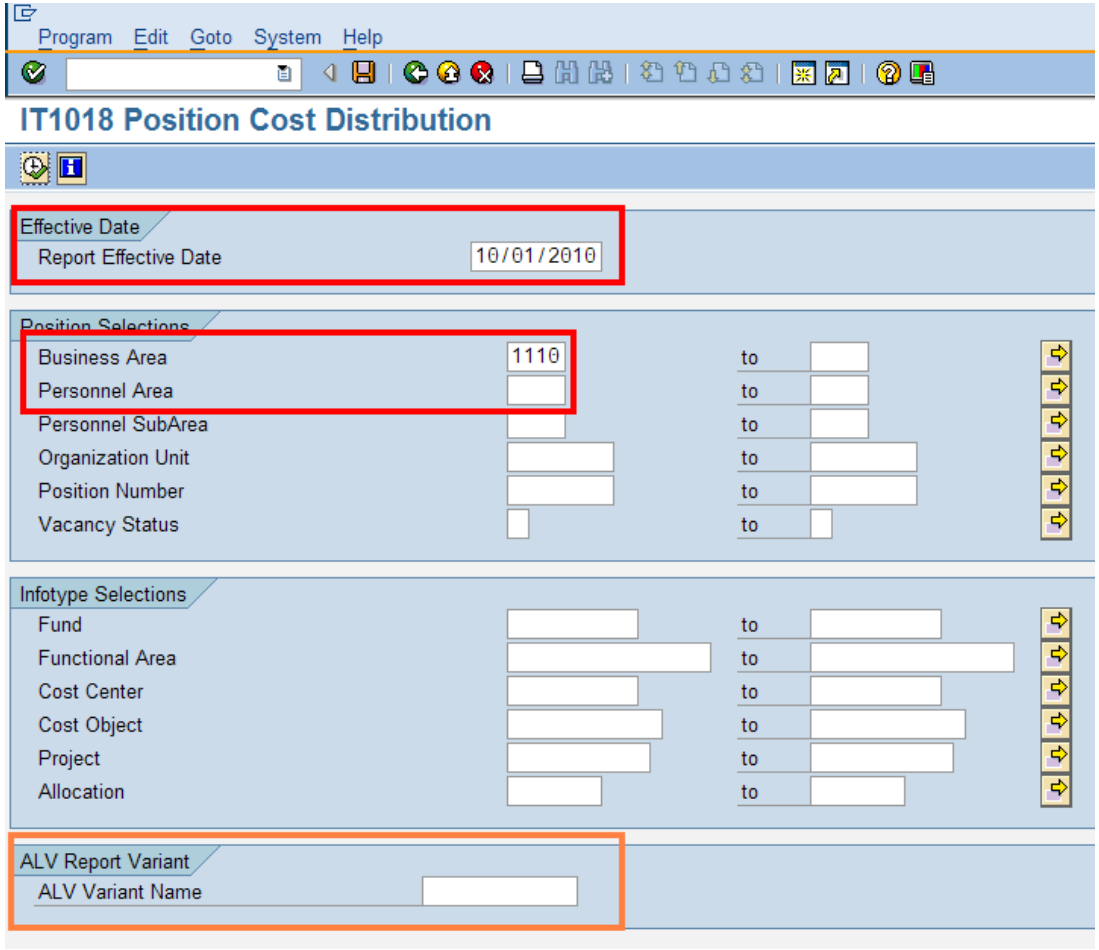
Info Type Number	Info Type Name	Object Type	Object Id Number	Object Abbr	Object Title	Effective Start Date	Effective End Date	Transaction Date	Created By	Planning Status	Status Title
1001	Relationships		30000491			10/01/2008	10/15/2008	10/02/2008	Z_OMPROC	1	Active

IT1018 Position Cost Distribution

- Use the report to view the cost distribution for each position within your agency
- Run the report when analysis is needed.
- Access the reports using the transaction code **ZHR_RPTFI1018.**

IT1018 Position Cost Distribution

- As required, complete the following:
  - Report Effective Date
  - Business Area or Personnel Area
- Optional:
  - ALV Variant Name
- Click (Execute)



IT1018 Position Cost Distribution (1of4)

List Edit Goto Views Settings System Help

IT1018 Position Cost Distribution

State of Washington - HRMS
IT1018 Position Cost Distribution

Report ID: ZHR_RPTFI1018
User: JANETP
Run Date: 05/24/2010
Effective Date: 04/27/2010
Business Area: Include - 1110
Personnel Area: All

Business Area	Business Area Desc.	Personnel Area	Personnel Area Desc.	Personnel SubArea	Personnel SubArea Desc.	Organization Unit	Organization Unit Description	Position	Position Short Text	P
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	30000501	PERSONNEL SERVICES	70005801	0005	A
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006050	HUMAN RESOURCES	70005806	0011	H
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006060	SERVICE CENTER	70005812	0019	C
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006060	SERVICE CENTER	70005813	0020	O
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006053	COMBINED FUND DRIVE	70005819	0028	P
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006053	COMBINED FUND DRIVE	70005821	0031	O
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006052	COMMUNICATIONS	70005830	0043	IT
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006057	CLASSIFICATION	70005836	0053	H

IT1018 Position Cost Distribution (2of4)

List Edit Goto Views Settings System Help

IT1018 Position Cost Distribution

State of Washington - HRMS
IT1018 Position Cost Distribution

Report ID: ZHR_RPTFI1018
User: JANETP
Run Date: 05/24/2010
Effective Date: 04/27/2010
Business Area: Include - 1110
Personnel Area: All

Position Title	Pos Start Date	Pos End D...	Vacancy Status	Cost Dist. Start	Cost Dist. End	Cost Center	Cost Center Desc.	Fund	Fund Desc.	Functional Area	Functional Ar
ADMIN ASST 3	06/01/2008	12/31/9999	2	01/16/2006	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110410000000000	ADMINISTRA
HUM RES CNSLT 4	01/01/2005	12/31/9999	2	07/01/2009	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110130000000000	HUMAN RES
CUST SVS SPEC 2	05/16/2008	12/31/9999	2	07/01/2007	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110433200000000	CUSTOMER
OFF ASST 2	05/01/2007	12/31/9999	2	07/01/2009	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110433200000000	CUSTOMER
PROG SPEC 2	01/01/2009	12/31/9999	2	07/01/2007	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110221000000000	CFD - ADMIN
OFF ASST 3	11/01/2009	12/31/9999	2	07/01/2007	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110221000000000	CFD - ADMIN
IT SPEC 4	06/01/2007	12/31/9999	2	01/16/2006	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110140000000000	COMMUNICA
HUM RES CNSLT 4	05/11/2007	12/31/9999	2	07/01/2009	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110422000000000	CLASSIFICAT

IT1018 Position Cost Distribution (3of4)

List Edit Goto Views Settings System Help

IT1018 Position Cost Distribution

State of Washington - HRMS
IT1018 Position Cost Distribution

Report ID: ZHR_RPTFI1018
User: JANETP
Run Date: 05/24/2010
Effective Date: 04/27/2010
Business Area: Include - 1110
Personnel Area: All

Cost Object	Cost Object Desc.	Project	Project Desc.	Allocation	Allocation Desc.	Cost Dist Perce...	Budgeted	Retirement Eligi...	EE_GRP	EE Group Desc	EE_SGRP	EE
111000000000	DEFAULT AGENCY 1...	11100000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	06	M-(
111000000000	DEFAULT AGENCY 1...	11100000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	01	Mo
111000000000	DEFAULT AGENCY 1...	11100000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	06	M-(
111000000000	DEFAULT AGENCY 1...	11100000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	06	M-(
111000000000	DEFAULT AGENCY 1...	11100000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	01	Mo
111000000000	DEFAULT AGENCY 1...	11100000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	06	M-(
111000000000	DEFAULT AGENCY 1...	11100000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	01	Mo
111000000000	DEFAULT AGENCY 1...	11100000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	01	Mo

IT1018 Position Cost Distribution (4of4)

List Edit Goto Views Settings System Help

IT1018 Position Cost Distribution

State of Washington - HRMS
IT1018 Position Cost Distribution

Report ID: ZHR_RPTFI1018
User: JANETP
Run Date: 05/24/2010
Effective Date: 04/27/2010
Business Area: Include - 1110
Personnel Area: All

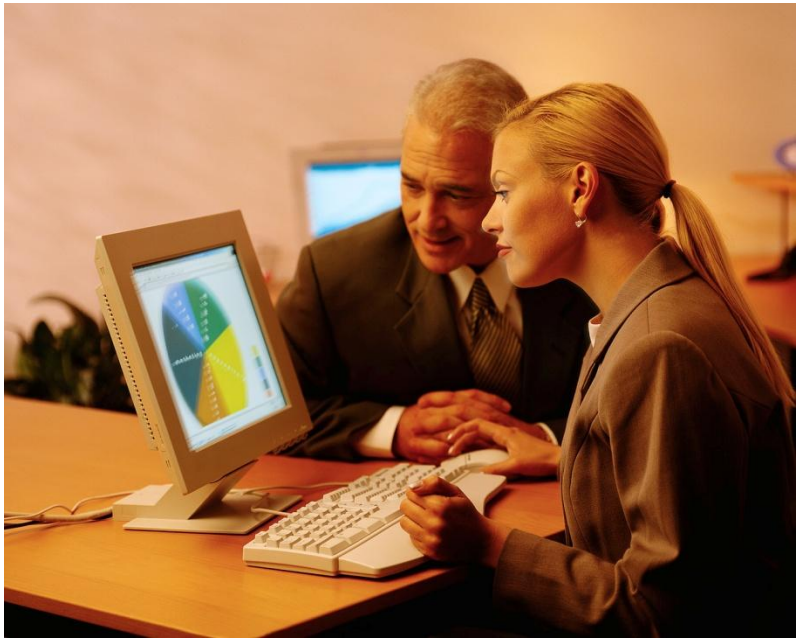
EE Group Desc	EE SubGroup Desc.	Related Job Class	Job Class Description	Pay Scale/Grade Type	PayScale/Grade A...	Pay Scale/Grade Group	Lowest Eligible Level	Highest Eligible Level
Permanent	M-OT Elig>40hrs/wk	51000780	ADMINISTRATIVE ASST 3	00	01	39	A	L
Permanent	Monthly(M) OT Exempt	50000658	HUMAN RESOURCE CONSULTANT	00	01	58	A	L
Permanent	M-OT Elig>40hrs/wk	50000292	CUST SVS SPEC 2	00	01	35	A	L
Permanent	M-OT Elig>40hrs/wk	50000271	OFFICE ASSISTANT 2	00	01	28	A	L
Permanent	Monthly(M) OT Exempt	50000299	PROG SPEC 2	00	01	41	A	L
Permanent	M-OT Elig>40hrs/wk	50000274	OFFICE ASSISTANT 3	00	01	31	A	L
Permanent	Monthly(M) OT Exempt	50001666	IT SPEC 4	00	01	62	A	L
Permanent	Monthly(M) OT Exempt	50000658	HUMAN RESOURCE CONSULTANT	00	01	58	A	L

HRMS Activity

Position Cost Distribution (IT1018)– ZHR_RPTFI0027 – Walk-through

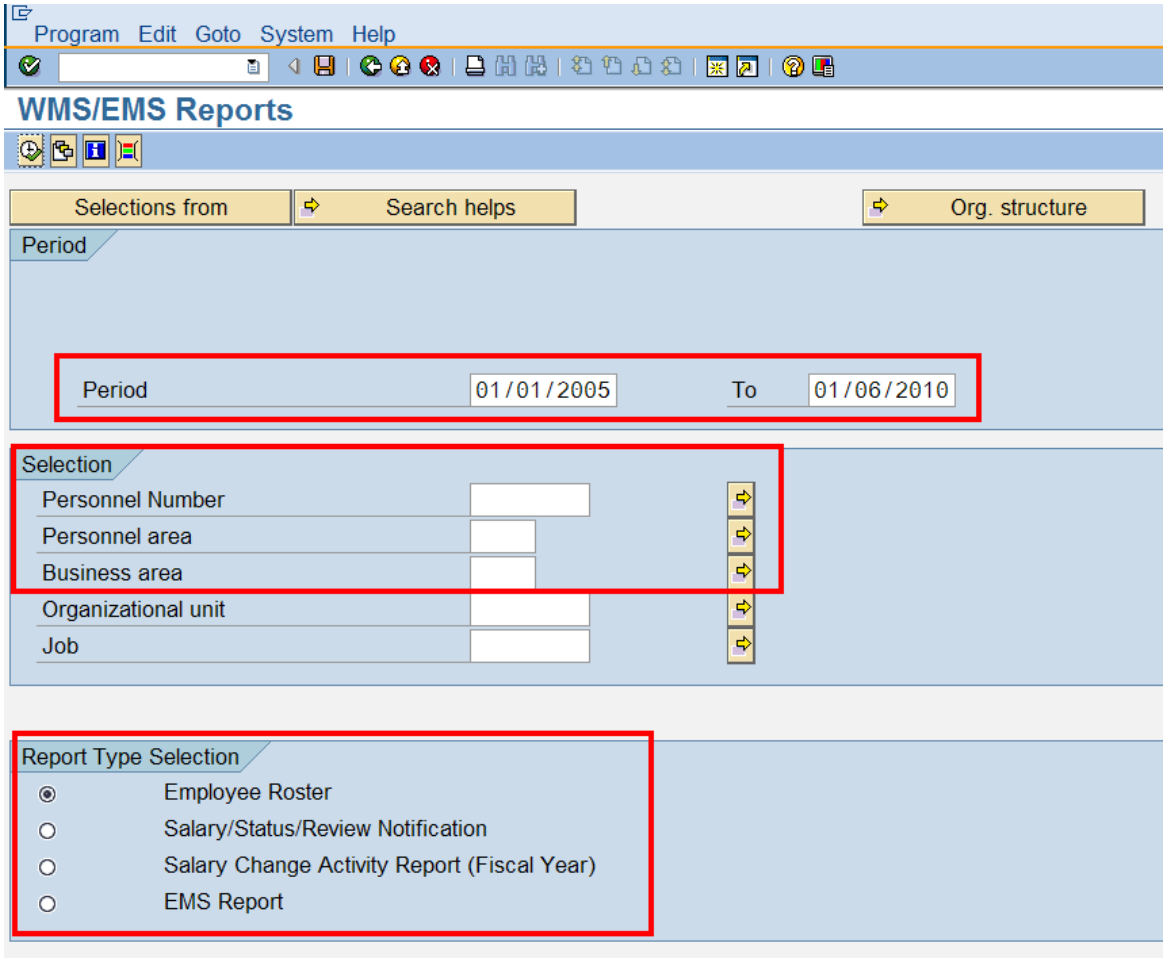
WMS/EMS Reports

- Used to identify WMS and EMS employees in the agency as well as their salary, status and review notification.
- Access the report using the transaction code **ZHR_RPTPA802**.



WMS/EMS Reports

- As required, enter the Period
- Conditional selection criteria include:
  - **Personnel area**
  - **Business area**
- Choose a report type:
  - **Employee Roster**
  - **EMS Report**
- Click **(Execute)** to execute the report.



Viewing Results: Washington Management Services Employee Roster (1 of 2)

List Edit Goto Views Settings System Help

Washington Management Services Reports

State of Washington - HRMS
WMS Employee Roster

Report ID : ZHR_RPTPA802
User : JANETP
Run Date : 12/08/2008
Period : 12/01/2008 through 12/15/2008

Pers.Area	Job Number	Job Title	JVAC	Employee Name	Pernr	Pers. Sub	Status	Term Date	Perm	Position	Position Title	Org Code
1110	50003921	WMS BAND 1	A2X-0452			0002	Active		Y	70005915	CONTRACTS ADMINISTRATOR	30000493
1110	50003921	WMS BAND 1	A2X-0452			0002	Active		Y	70005909	ASSESSMENT SERVICES MANAGER	30000502
1110	50003922	WMS BAND 2	B2X-0570			0002	Active		Y	70005869	COMMUNICATIONS MANAGER	30000492
1110	50003922	WMS BAND 2	B2W-0546			0002	Active		Y	70084260	HR CLIENT SERVICES MANAGER	30000492
1110	50003922	WMS BAND 2	B2W-0546			0002	Active		N	70005940	LEGISLATIVE LIAISON	30000508
1110	50003922	WMS BAND 2	B2X-0570			0002	Active		Y	70084251	RECRUITMENT INFRASTRUCTURE MANAGER	30000502

The Employee's Name and Personnel Numbers have been blocked for security purposes.

Viewing Results: Washington Management Services Employee Roster – cont'd

List Edit Goto Views Settings System Help

Washington Management Services Reports

State of Washington - HRMS
WMS Employee Roster

Report ID : ZHR_RPTPA802
User : JANETP
Run Date : 12/08/2008
Period : 12/01/2008 through 12/15/2008

.	Org Abbr.	Employee G	Contract	Effective	Reason	Reason Text	Pay Scale	Total Sala	Anniversary	Appointmen	WMS Review	Next Incre	Count
3	AB	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 1	2,921.00	05/11/1991	09/01/2005	03/14/2006		1
3	AK	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 1	2,805.50	01/28/2001	02/01/2005	02/01/2006		1
3	AA	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 2	3,205.00	04/10/1978	07/25/1994	04/10/2004		1
3	AA	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 2	2,960.50	01/01/1985	09/16/2008	12/01/2006		1
3	AT	Permanent	Probation	09/01/2008	02	Rng Inc Due to Director Action	BAND 2	2,767.50	12/17/2007	06/16/2008			1
3	AK	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 2	2,903.50	05/02/1976	02/01/2007	01/01/2007		1

HRMS Activity

WMS Report – ZHR_RPTPA802 – Walk-through

Other Organizational Management Reports (Business Intelligence)

- The following reports are available through Business Intelligence: (Please requests assistance from your agency's Business Intelligence user when running these reports)
  - Position – Personnel Master Listing
  - Position Statistics Report
  - Position Roster
  - Supervisor to Employee

Summary

You can now:

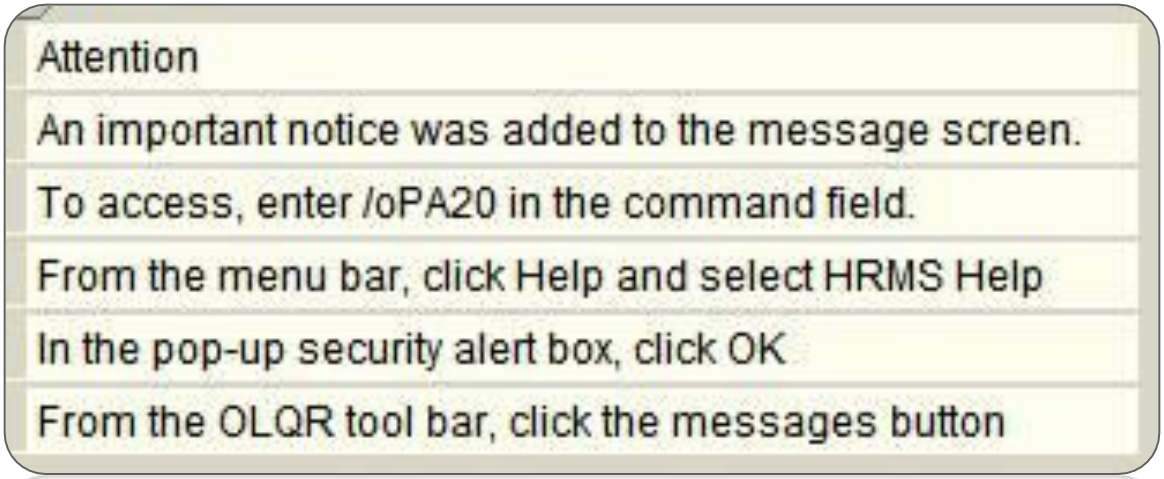
- Describe an overview of organizational management
- Explain the basic organizational management concepts and terms
- Perform the organizational unit and position exercises outlined in the Activity Guide
- Explain the organizational management integration with Personnel Administration
- Prepare organizational management reports

HRMS Resources

- **The following resources are available for your use:**
  - DOP Service Center– (360) 664–6400
    - ServiceCenter@dop.wa.gov
  - The On-Line Quick Reference
    - http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/
  - HRMS Support Website
    - http://www.dop.wa.gov/payroll/HRMS/HRMSSupport/Pages/default.aspx
  - HRMS Data Definitions
    - http://pub/payroll/HRMS/OnLineQuickReference/Pages/DataDefinitions.aspx

ZAlert System Messages

- Messages are sent by the Department of Personnel Service Center and will appear when logged into the system or when first logging in.
  - ZAlerts will last up to 2 hours after being displayed. Once the message has expired you will no longer see the message.
- Messages will vary and may contain information regarding payroll pick-up or may direct you to the HRMS Message Center.



Question and Answer

Training Evaluation

- Please take a few minutes to complete the course evaluation prior to leaving.

Thank you for your participation

Helpful Hints

The following section is used to provide users additional system information in HRMS.

- SOW Profile
- Structure Search
- OM Free Search

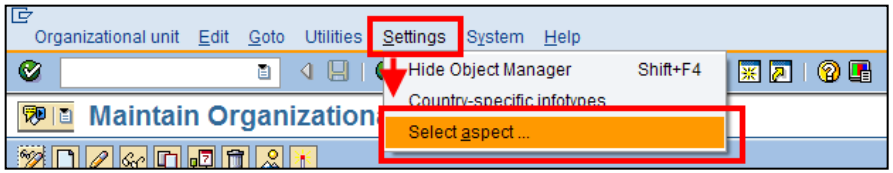
Additional Information – SOW Profile

- To temporarily remove extra infotypes in **PO10**, **PO13** and **PO03**.
- Agency end-users have the ability to display State of Washington infotypes only by selecting an aspect.

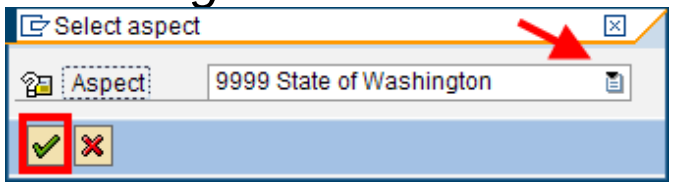
Note: Once the aspect has been selected for either transaction code, it will be available for the current login session.

- **How to:**

1. From the transaction screen, go to the *Menu bar* and select **Settings** then **Select aspect**



2. The Select aspect window will appear, from the drop-down menu select *State of Washington*.

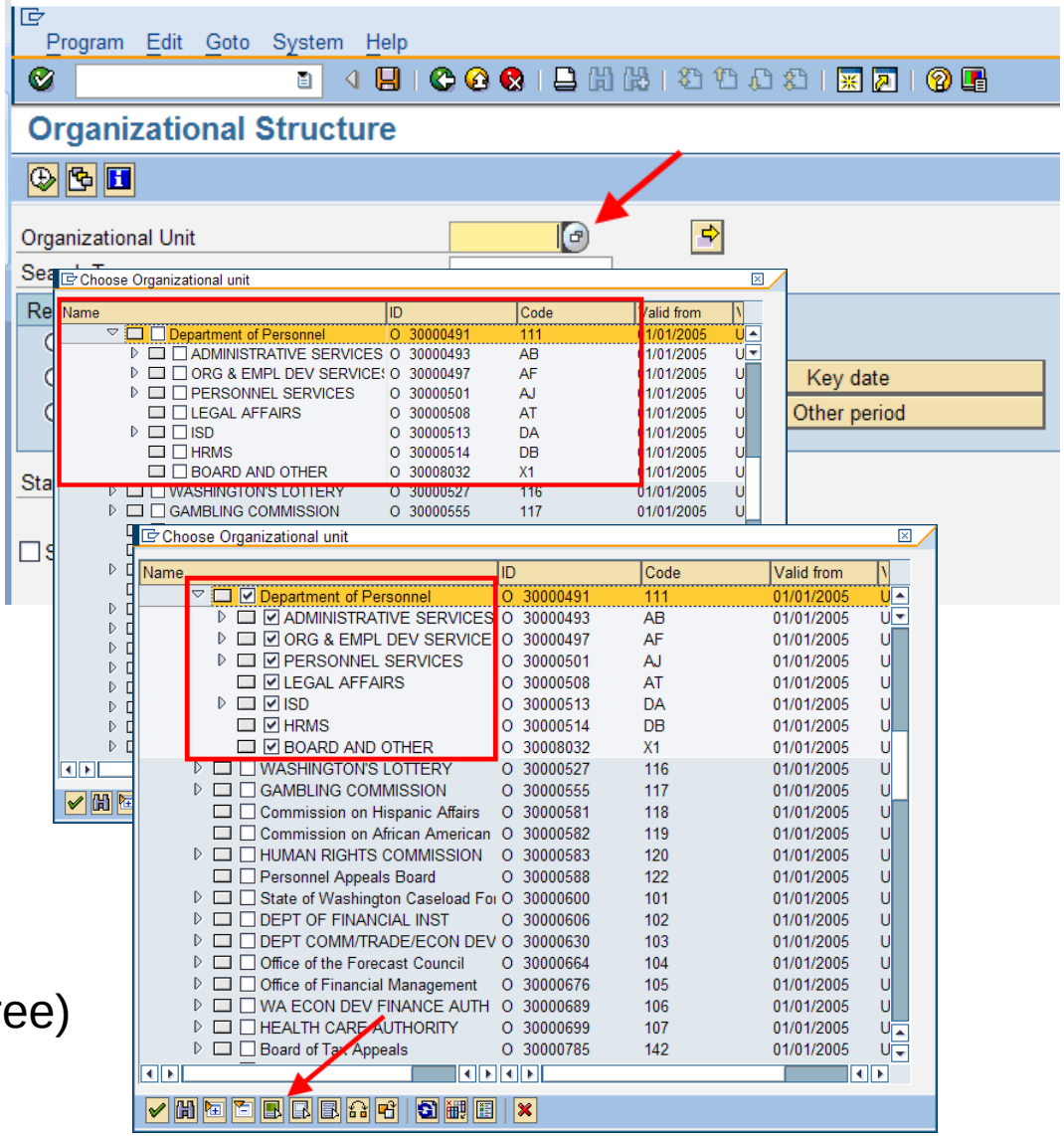


3. Click (**Transfer**)

Additional Information – Structure Search

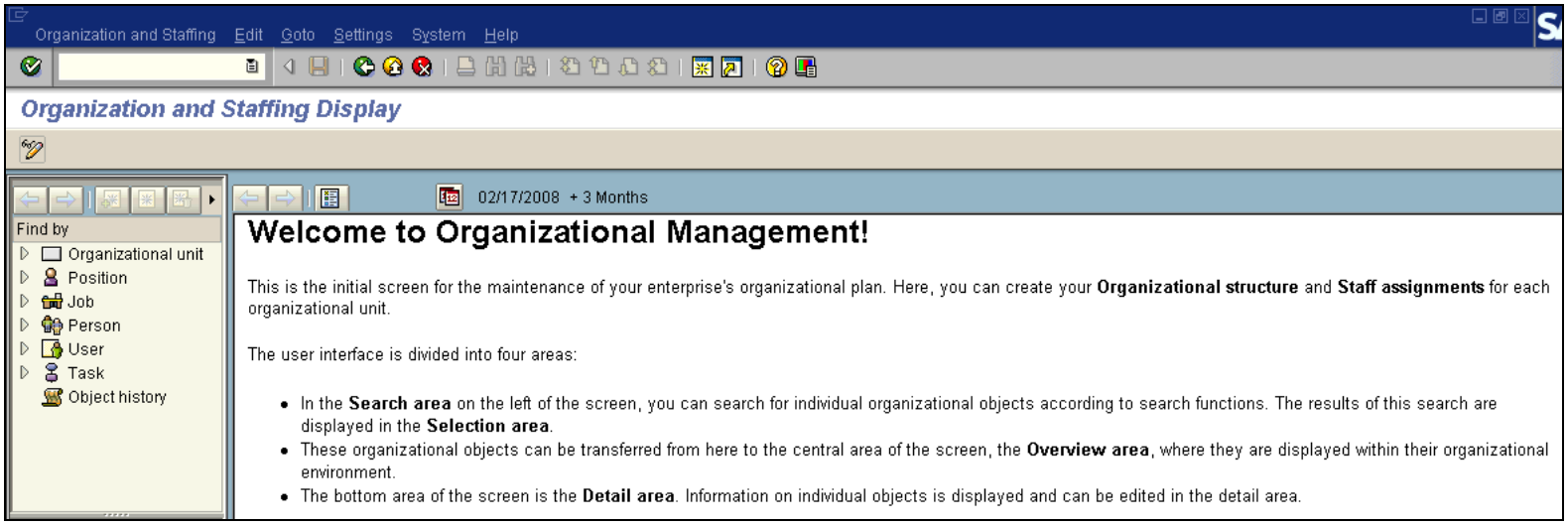
- Utilize the Structure Search option when looking up an Org Unit or Position Number.
  - Access Structure Search by clicking on the matchcode in either the Org Unit or Position number field.
- Scroll down to find your selection.

Note: The (Select Subtree) will allow you to make more than one selection.



OM Free Search

- The OM Free Search provides you with an ADHOC query to search for information that reflects your business needs. Such as position vacancy information.
- To access this search, use the transaction code **PPOSE**.

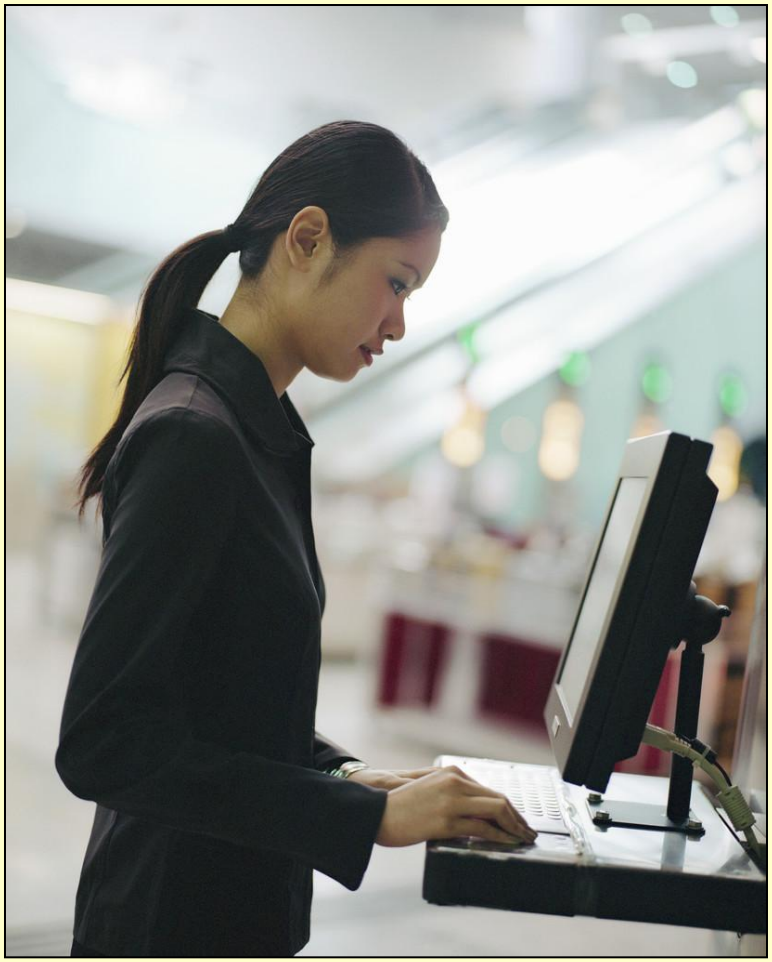


Other Available Reports

- Here is a list of other OLQR User Procedures that have not been mentioned in the course:
  - Organizational Structure Report
  - Organizational Structure with Positions
  - Report Structure with Persons
  - Pay Grade Structure for Jobs
  - Organizational structure with Persons
  - Existing Jobs
  - Existing Positions

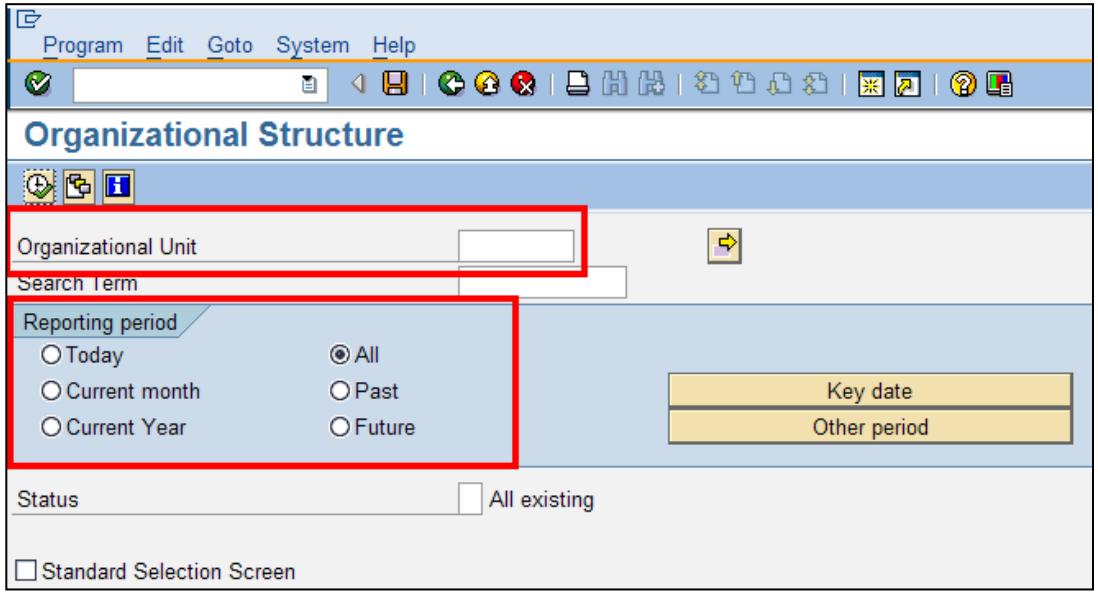
Organizational Structure Report

- This report is used to view the hierarchy that exists between organizational units.
- Run the report when analysis on organizational structure is needed.
- Access the report using the transaction code **S_AHR_61016493**.



Organizational Structure Report

1. As required, enter the Organizational Unit (use matchcode for ease of selection – see the *Additional Information* section for further instruction)
2. In the reporting period, select the radio button 'All'
3. Click (Execute)



Viewing Results: Organizational Structure Report

Structure Display Edit Goto System Help

Structure Display/Maintenance

Plan Version: 01
Evaluation Path: ORGEH (Organizational structure)
Depth: 0
Status Vector: 1
Evaluation Period: 01/01/1900 - 12/31/9999

Object Description	Object abbr.	Object Type	Extended object ID	Status (Object)	Start Date (Object)	End Date (Object)	Status (Relationship
Department of Personnel	111	O	30000491	1	01/01/2005	12/31/9999	
ADMINISTRATIVE SERVICES	AB	O	30000493	1	01/01/2005	12/31/9999	1
CLIENT SERVICES	AM	O	30000504	1	01/01/2005	12/31/9999	1
ORG & EMPL DEV SERVICES a	AF	O	30000497	1	01/01/2005	12/31/9999	1
PASION ORG UNIT	TEST-JP	O	31003400	1	06/01/2008	12/31/9999	1
CLASSIFIED ORG UNIT	AG	O	30000498	1	01/01/2005	01/16/2006	1
PERSONNEL SERVICES	AJ	O	30000501	1	01/01/2005	12/31/9999	1
RECRUITMENT & ASSESSMENT	AK	O	30000502	1	01/01/2005	12/31/9999	1
CLASSIFICATION & COMPENSATION	AL	O	30000503	1	01/01/2005	12/31/9999	1
CLIENT SERVICES	AM	O	30000504	1	01/01/2005	12/31/9999	1
RECRUITMENT & ASSESSMENT	AK	O	30000502	1	01/01/2005	12/31/9999	1
CLASSIFICATION & COMPENSATION	AL	O	30000503	1	01/01/2005	12/31/9999	1
CLIENT SERVICES	AM	O	30000504	1	01/01/2005	12/31/9999	1
CLASSIFIED ORG UNIT	AN	O	30000505	1	01/01/2005	01/16/2006	1
CLASSIFIED ORG UNIT	AR	O	30000506	1	01/01/2005	01/16/2006	1
CLASSIFIED ORG UNIT	AS	O	30000507	1	01/01/2005	01/16/2006	1
LEGAL AFFAIRS	AT	O	30000508	1	01/01/2005	12/31/9999	1
111 A	111 A	O	30000509	1	01/01/2005	01/16/2006	1
111 D	111 D	O	30000510	1	01/01/2005	02/28/2007	1
ISD	DA	O	30000513	1	01/01/2005	12/31/9999	1
Test 01 - HRD org	Test 01 org	O	31003325	1	03/28/2008	05/15/2008	1

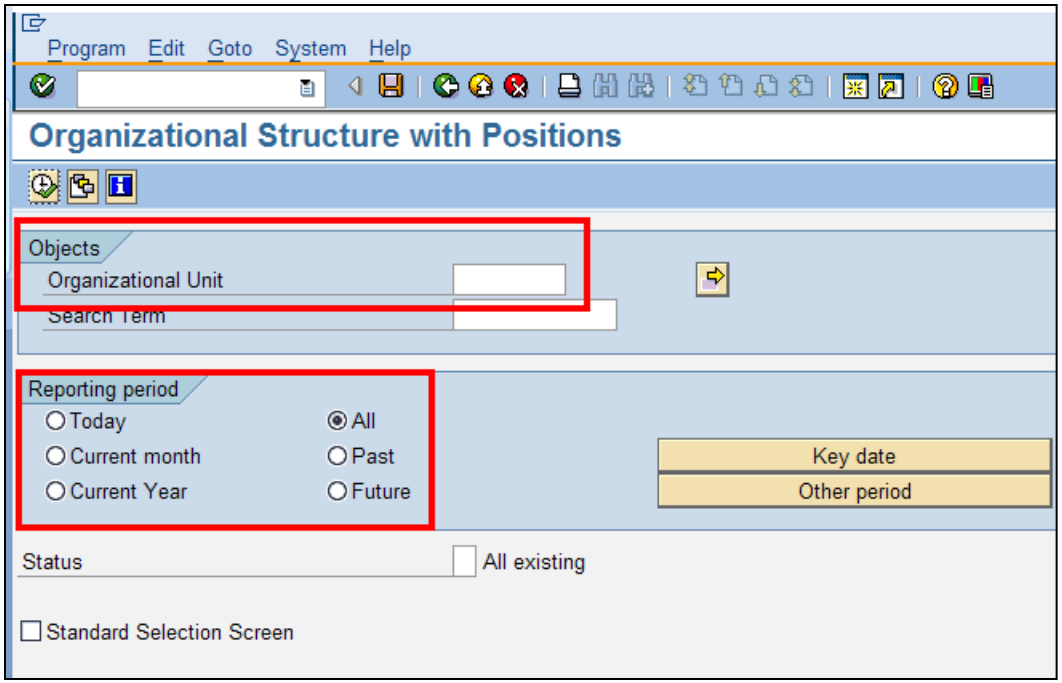
S_AHR_61016493 ssvdbhrdecc INS

Organizational Structure with Positions

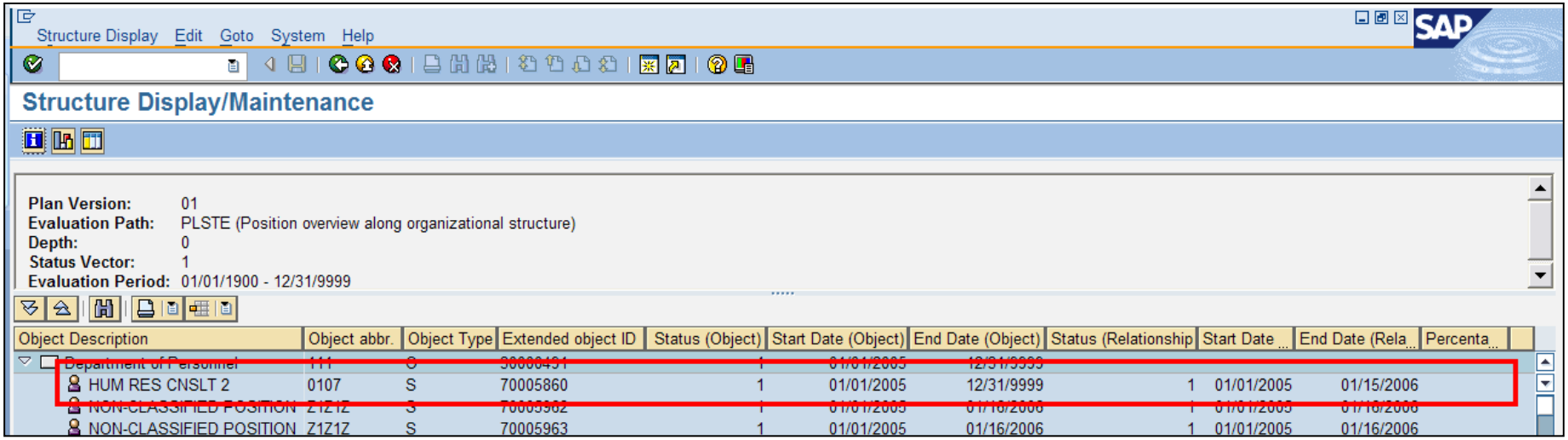
- Use to view how positions relate to organizational units.
- Run the report when analysis on organizational structure with positions is needed.
- Access the report using the transaction code **S_AHR_61016494**.

Organizational Structure with Positions

1. As required, enter the Organizational Unit (use matchcode for ease of selection – see the *Additional Information* section for further instruction)
2. In the reporting period, select the radio button 'All'
3. Click (Execute)



Viewing Results: Organizational Structure with Positions



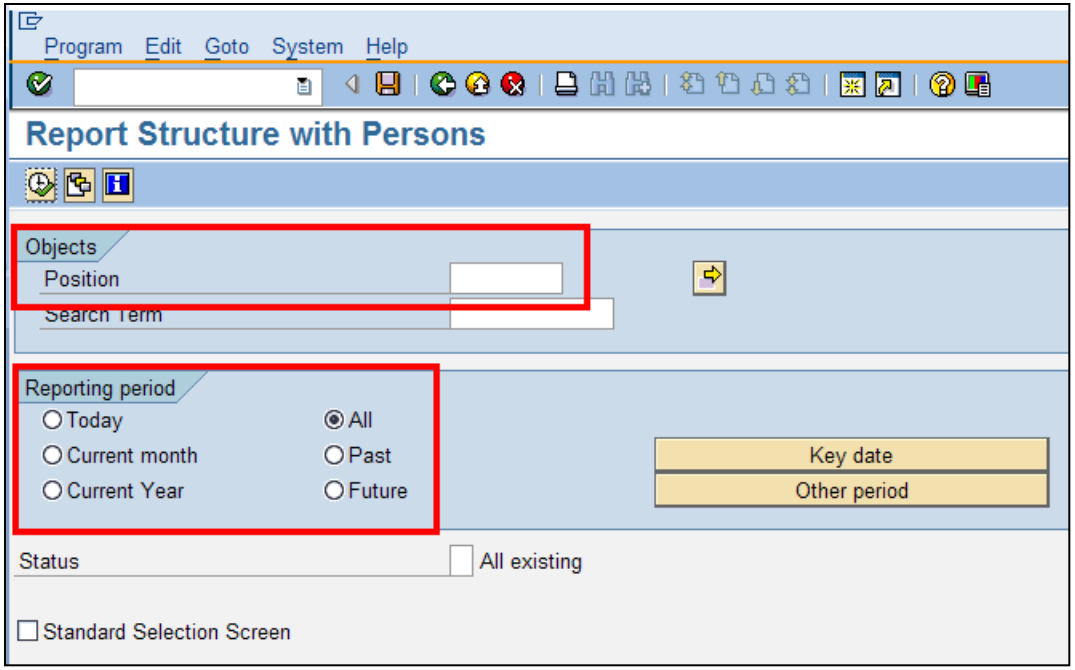
Note: There may be additional information that is currently not displayed due to the size of your screen display, use the bar at the bottom of the screen to scroll to get to view the information.

Report Structure with Persons

- Use to view the hierarchy that exists between positions and includes the employees that are assigned to the positions.
- Run the report when analysis on organizational structure with positions and employees is needed.
- Access the report using the transaction code **S_AHR_61016513**.

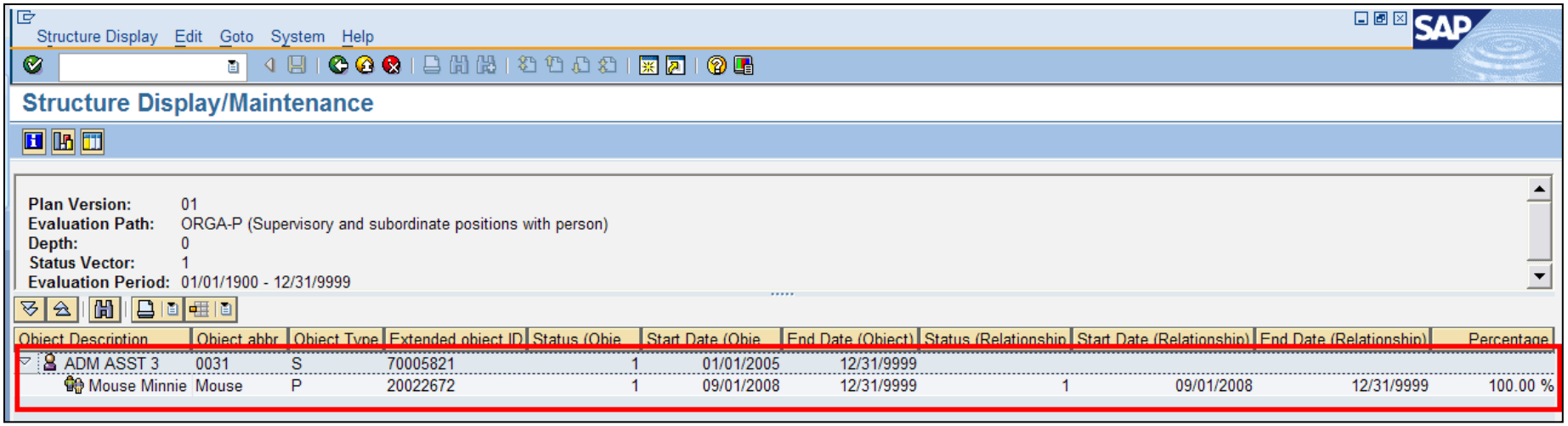
Report Structure with Persons

1. As required, enter the Position number (use matchcode for ease of selection – see the *Additional Information* section for further instruction)
2. In the reporting period, select the radio button 'All'
3. Click (Execute)



Note: When selecting more than one object, utilize the (Select Subtree) function found in the Structure Search.

Viewing Results: Report Structure with Persons

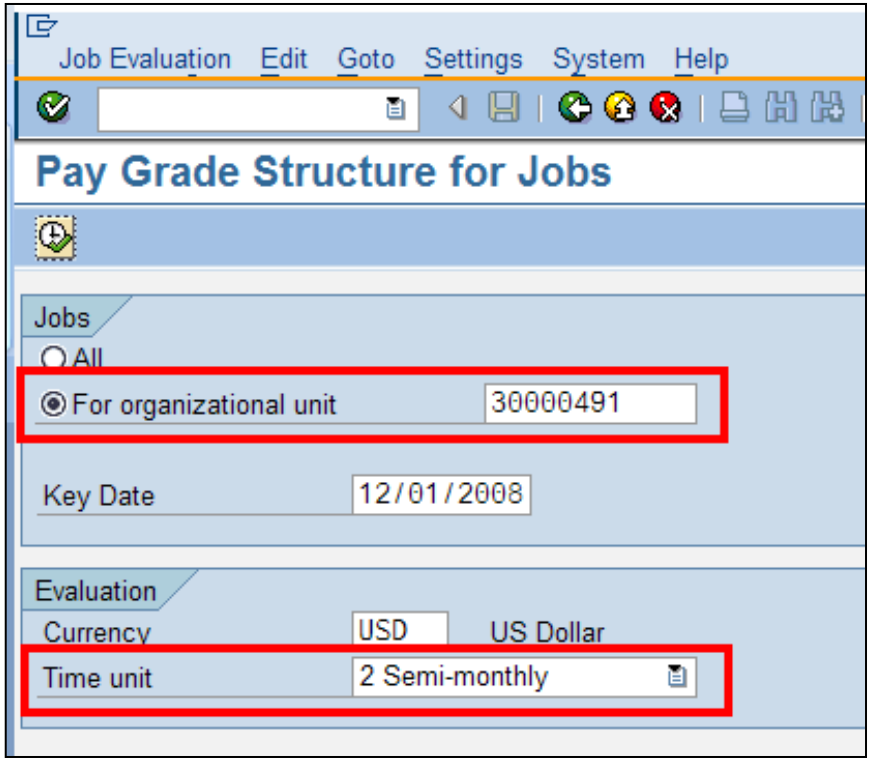


Pay Grade Structure for Jobs

- Use the report to display the pay grade type, area, grade and level associated with a job.
- Run the report when analysis is needed.
- Access the report using the transaction code **S_AHR_61018797**.

Pay Grade Structure for Jobs

- Complete the following required fields:
  - For organizational unit
    - Use matchcode
  - Key Date
  - Time Unit
    - *Semi-monthly*
- Click **(Execute)**



Viewing Results: Pay Grade Structure for Jobs

Job evaluation Edit Goto Extras System Help

Pay Grade Structure for Jobs

Key Date 12/01/2008
Currency USD
Time unit 2 Semi-monthly

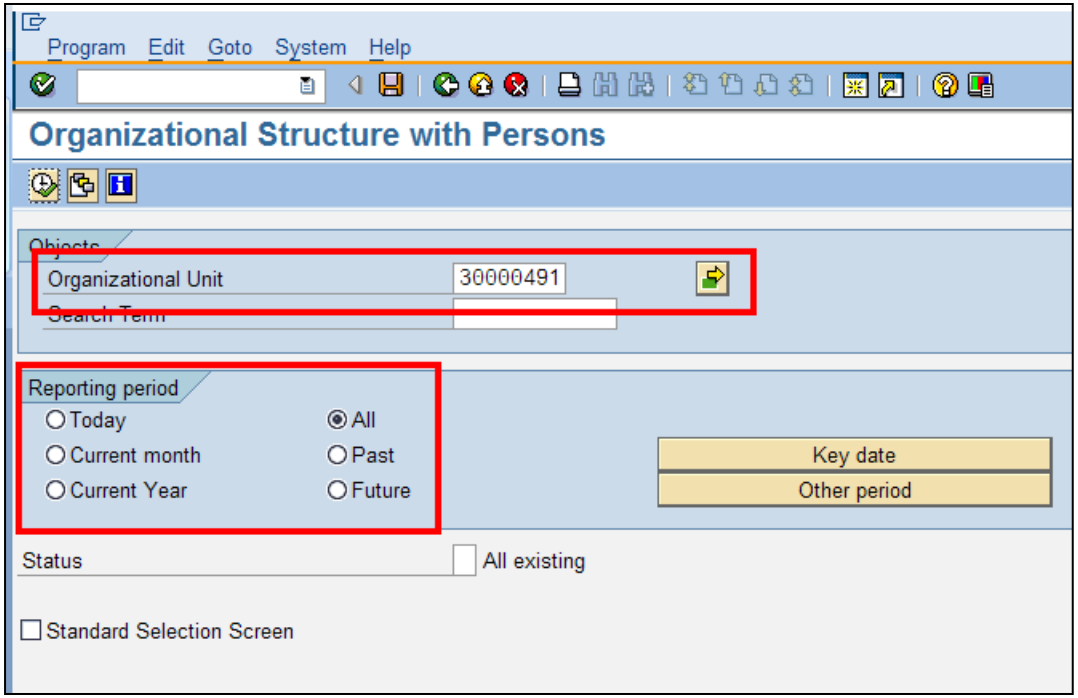
Job	Pay grade type	Pay grade area	Pay grade	MinLvl	MaxLvl	Reference salary	Min. grade level	Max. grade le
A/D CL & EMP REL	Non-Represented	EMS	BAND 4	04	04	0.00	3,058.33	5,270.
A/D HUM RS INF S	Non-Represented	EMS	BAND 4	04	04	0.00	3,058.33	5,270.
A/D MGT/ADM SVS	Non-Represented	EMS	BAND 3	03	03	0.00	2,551.46	4,547.
A/D PERS SVS	Non-Represented	EMS	BAND 4	04	04	0.00	3,058.33	5,270.
AD. ORG & EMP DEV SVS	Non-Represented	EMS	BAND 4	04	04	0.00	3,058.33	5,270.
COMM QUAL IMP MG	Non-Represented	EMS	BAND 3	03	03	0.00	2,551.46	4,547.
CONF. SECRETARY	Non-Represented	Non-Pay Scale	01	01	01	0.00	0.00	16,666.
DEP DIR PERS	Non-Represented	EMS	BAND 5	05	05	0.00	3,713.54	6,035.
DEPUTY ASST DIRECTOR F...	Non-Represented	EMS	BAND 3	03	03	0.00	2,551.46	4,547.
DIRECTOR	Non-Represented	Non-Pay Scale	01	01	01	0.00	0.00	16,666.
DIRECTOR OF COMMUNICA...	Non-Represented	EMS	BAND 3	03	03	0.00	2,551.46	4,547.
DOP BOARD MEMBER	Non-Represented	Board Members	01	01	01	0.00	0.00	8,333.
HUM RES MGR DOP	Non-Represented	EMS	BAND 2	02	02	0.00	2,200.00	4,037.
SPECIAL ASSISTANT, DOP	Non-Represented	EMS	BAND 2	02	02	0.00	2,200.00	4,037.
TEST MONITOR	Non-Represented	Non-Pay Scale	01	01	01	0.00	0.00	16,666.
WMS BAND 1	Non-Represented	WMS	BAND 1	01	01	0.00	1,666.67	3,400.
WMS BAND 2	Non-Represented	WMS	BAND 2	02	02	0.00	2,200.00	4,037.
WMS BAND 3	Non-Represented	WMS	BAND 3	03	03	0.00	2,551.46	4,547.

Organizational Structure with Persons

- Use the report to view employees in Organizational Units.
- Run the report when analysis is needed.
- Access the reports using the transaction code **S_AHR_61016495**.

Organizational Structure with Persons

- As required, enter the *Organizational unit* (use matchcode for ease of selection)
- In the *Reporting period*, select the radio button 'All'
- Click (Execute)



Organizational Structure with Persons

Structure Display Edit Goto System Help

Structure Display/Maintenance

Plan Version: 01
Evaluation Path: PERS-O (Persons along an organizational structure)
Depth: 0
Status Vector: 1
Evaluation Period: 01/01/1900 - 12/31/9999

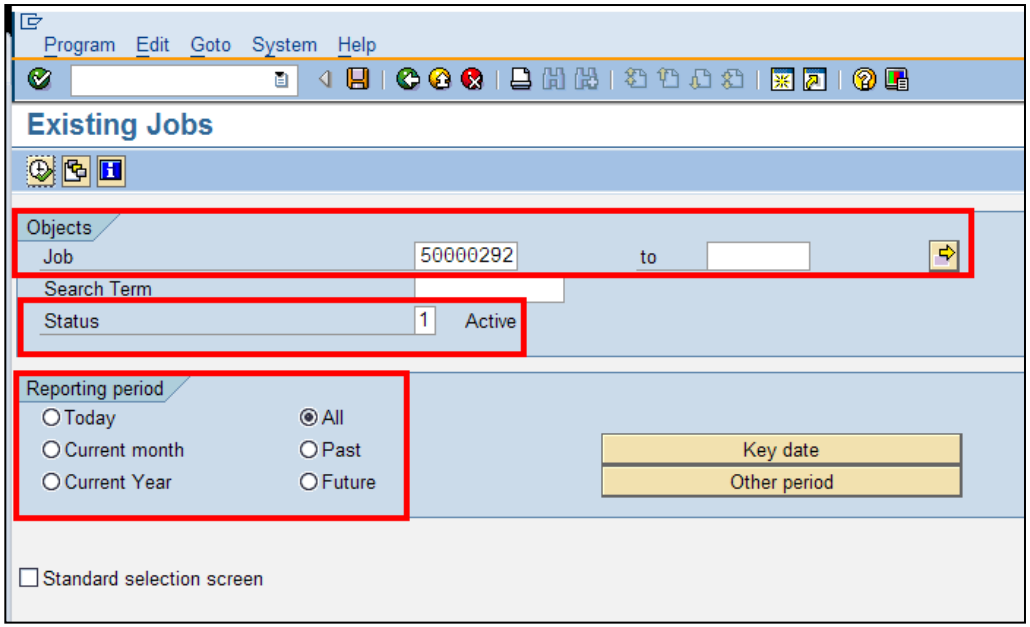
Object Description	Object abbr.	Object Type	Extended object ID	Status (Object)	Start Date (Object)	End Date (Object)	Status (Relationship
Department of Personnel	111	O	30000491	1	01/01/2005	12/31/9999	
DIRECTOR'S OFFICE	AA	O	30000492	1	01/01/2005	12/31/9999	1
ADMINISTRATIVE SERVICES	AB	O	30000493	1	01/01/2005	12/31/9999	1
ORG & EMPL DEV SERVICES	AF	O	30000497	1	01/01/2005	12/31/9999	1
John Doe 04000000	Doe 04000000	P	04000000	1	01/01/2005	12/31/9999	1
CLASSIFIED ORG UNIT	AG	O	30000498	1	01/01/2005	01/16/2006	1
PERSONNEL SERVICES	AJ	O	30000501	1	01/01/2005	12/31/9999	1
RECRUITMENT & ASSESSMENT	AK	O	30000502	1	01/01/2005	12/31/9999	1
CLASSIFICATION & COMPENSATION	AL	O	30000503	1	01/01/2005	12/31/9999	1
CLIENT SERVICES	AM	O	30000504	1	01/01/2005	12/31/9999	1
RECRUITMENT & ASSESSMENT	AK	O	30000502	1	01/01/2005	12/31/9999	1
CLASSIFICATION & COMPENSATION	AL	O	30000503	1	01/01/2005	12/31/9999	1

Existing Jobs

- Use the report to generate an overview of all existing jobs.
- Run the report when analysis is needed.
- Access the report using the transaction code **S_AHR_61016497**.

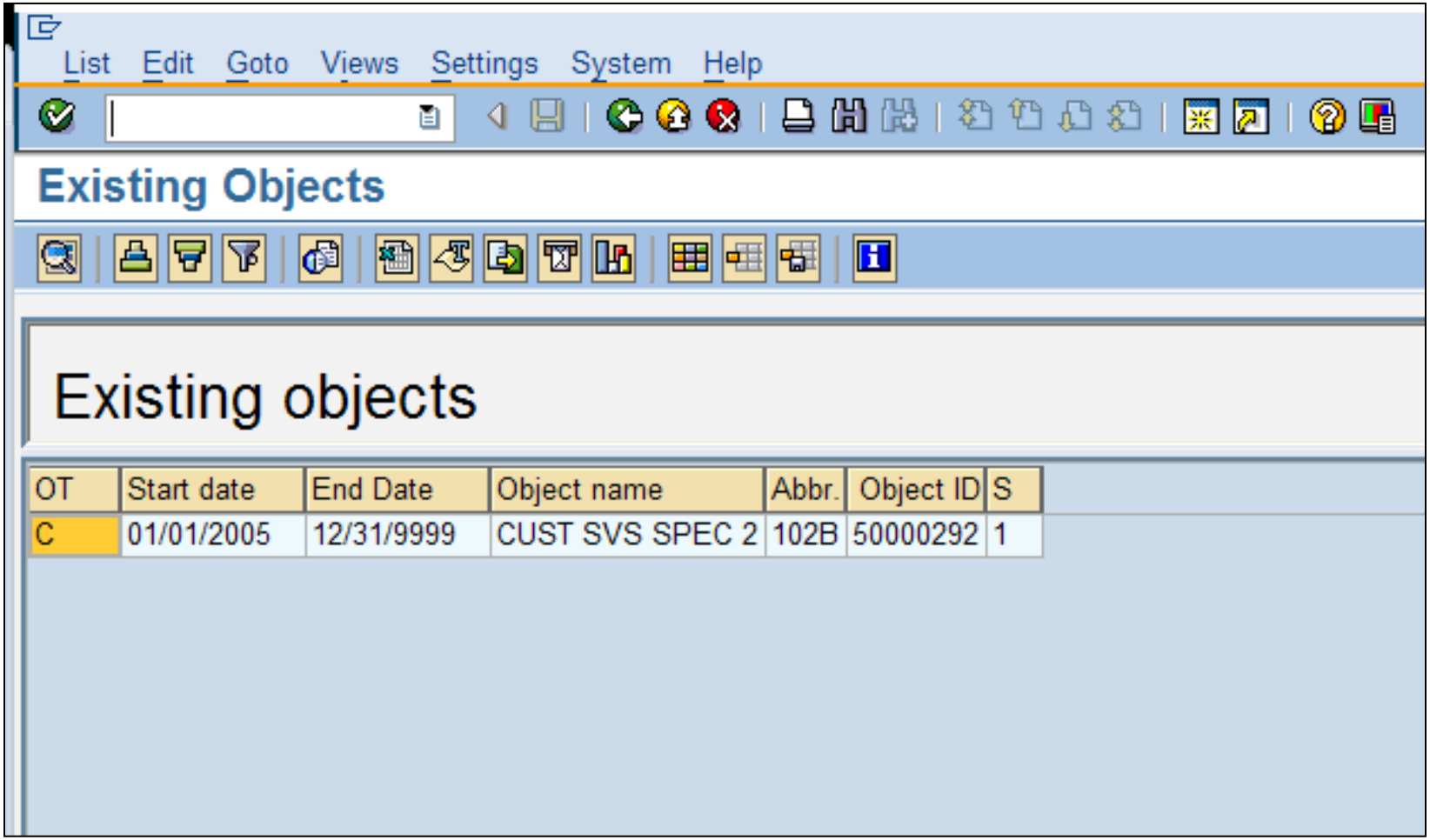
Existing Jobs

1. As required, enter the following fields
   - Job (use matchcode for ease of selection)
   - Status (1 – Active)
2. In the reporting period, select the radio button 'All'
3. Click (Execute)



Note: You may also search for Jobs by using the Search Term field.

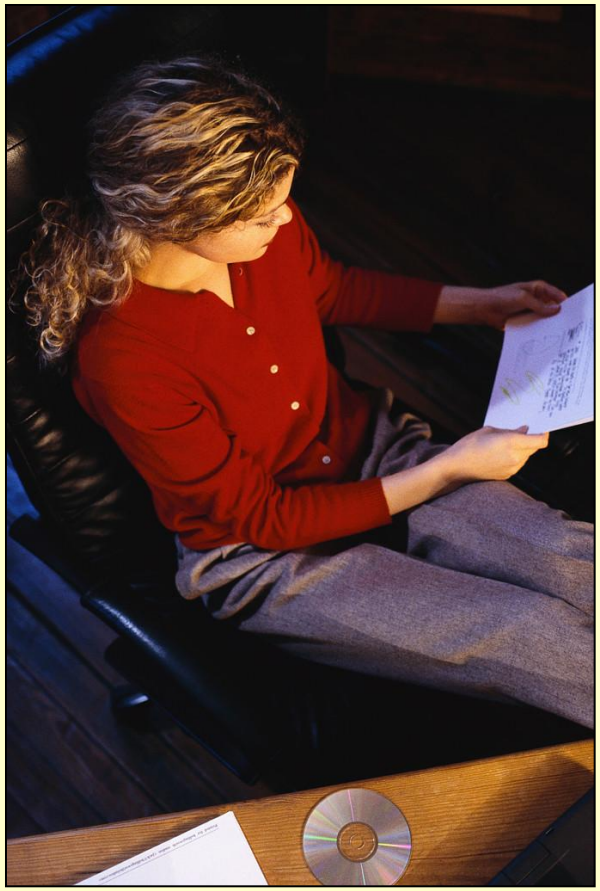
Viewing Results: Existing Jobs



OT	Start date	End Date	Object name	Abbr.	Object ID	S
C	01/01/2005	12/31/9999	CUST SVS SPEC 2	102B	50000292	1

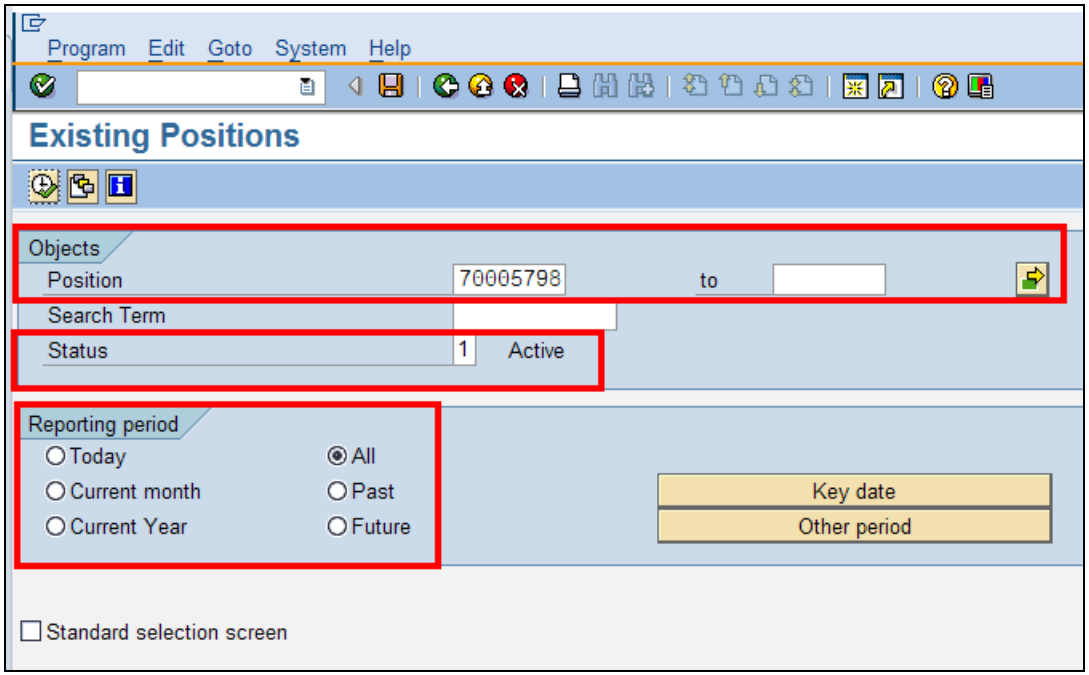
Existing Positions

- Use the report to generate an overview of all existing positions.
- Run the report when analysis is needed.
- Access the report using the transaction code **S_AHR_61016502** .



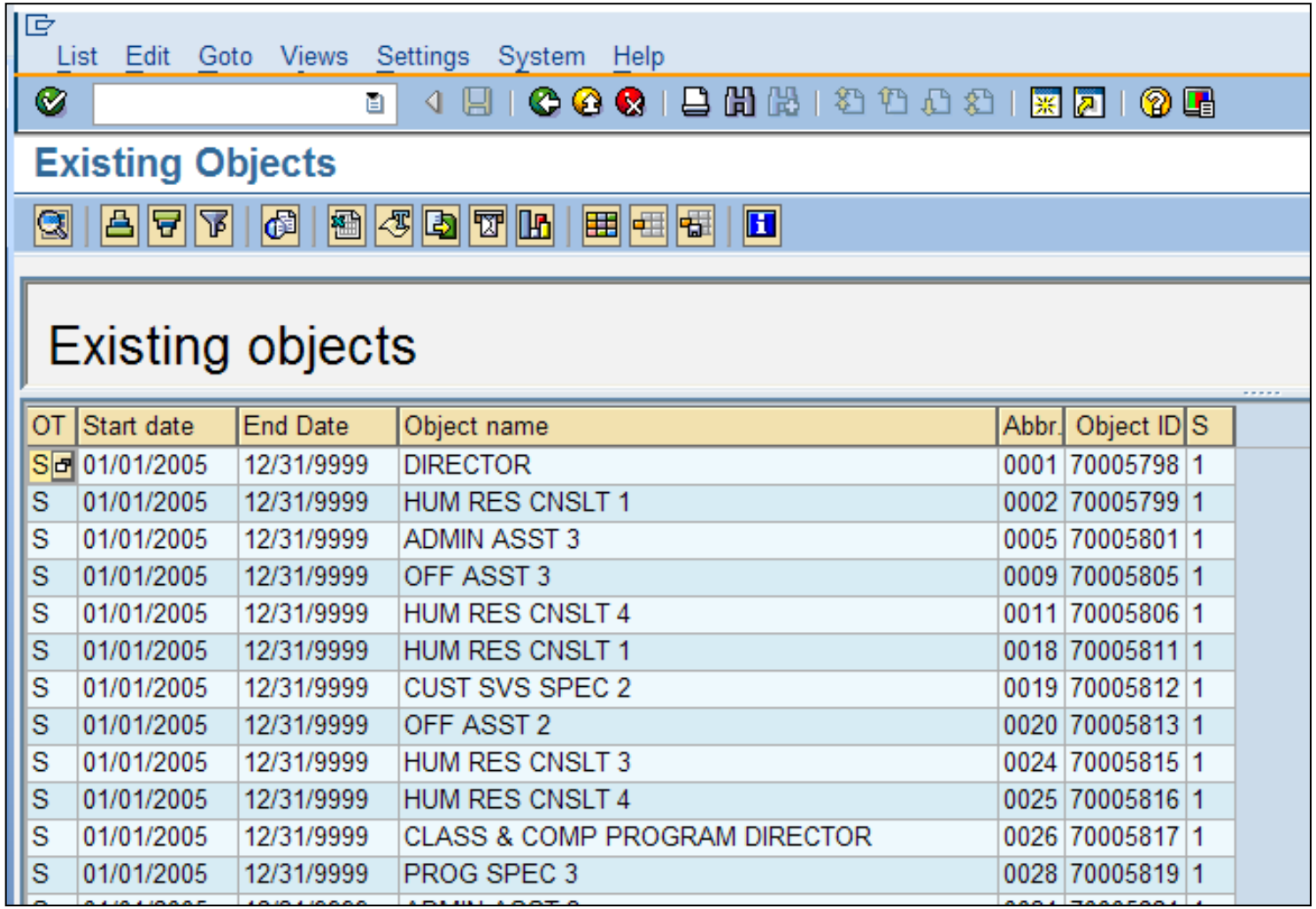
Existing Positions

- As required, enter the following fields
  1. Position (use matchcode for ease of selection)
  2. Status (1 – Active)
3. In the reporting period, select the radio button 'All'
4. Click (Execute)



Note: When selecting more than one object, utilize the (Select Subtree) function found in the Structure Search.

Viewing Results: Existing Positions



OT	Start date	End Date	Object name	Abbr.	Object ID	S
S	01/01/2005	12/31/9999	DIRECTOR	0001	70005798	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 1	0002	70005799	1
S	01/01/2005	12/31/9999	ADMIN ASST 3	0005	70005801	1
S	01/01/2005	12/31/9999	OFF ASST 3	0009	70005805	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 4	0011	70005806	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 1	0018	70005811	1
S	01/01/2005	12/31/9999	CUST SVS SPEC 2	0019	70005812	1
S	01/01/2005	12/31/9999	OFF ASST 2	0020	70005813	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 3	0024	70005815	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 4	0025	70005816	1
S	01/01/2005	12/31/9999	CLASS & COMP PROGRAM DIRECTOR	0026	70005817	1
S	01/01/2005	12/31/9999	PROG SPEC 3	0028	70005819	1