Exercise Guide for

PA313-VC

Modifying Position/Employee Data and Reporting

5/9/12

Disclaimer: The position action scenarios and exercises included in this course have been created solely for the purposes of training.

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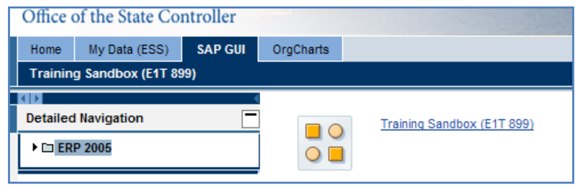
Exercise 1.1: Log on to SAP

Scenario

Log into the OSC HR/Payroll system training sandbox.

Instructions

1. Access the HR/Payroll portal as you normally would in your work environment (you may have to open a new internet browser).
2. Enter your own user id and password.
3. Click the training GUI tab.
4. Click Training Sandbox E1T 899. The SAP Easy Access screen displays.



5. On the taskbar, **<u>leave open</u> the PA313 Connect Pro Meeting, SAP Easy Access and State of NC icons**; <u>close</u> all other icons.
6. Click the PA313 Connect Pro Meeting icon on the taskbar to return to the PA313 Connect Pro Meeting.
7. Use the **Green Check** (right panel of Training Center) icon to let the instructor know you have successfully logged on. The instructor will clear the check after confirming that all participants have successfully logged on.

   NOTE: It is important that you complete all exercises. The instructor will, from time to time, display a student's screen to review the data with the class.

Exercise 1.2: Revise Position Settings

PO13

Student #	Position #
1	65002527
2	65002528
3	65002529
4	65002530
5	65002531
6	65002532
7	65002533
8	65002534
9	65002535
Instructor	65002536

Scenario

NOTE: Revising position settings is an OM role that some (not all) Master Data Maintainers may be granted. For training purposes, assume that you do have this role.

You have received verification that the position settings were incorrect on the Information and Communication Specialist II position. Beginning today, the position will be eligible for Overtime Compensation and Holiday Payout; both with a 60-day payout.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

Before starting the exercises for class today, follow your instructor's directions to add the transactions below to your Favorites folder on the SAP Easy Access screen.

- PA13
- PA20

Be sure to activate your Technical settings display function. Follow these steps:

- On the menu at the top of the screen, click on the path:
  Extras > Settings
- Click the checkbox next to "Display technical settings".
- Click the green check mark.

Now you are ready to begin your exercises for today's class.

1. Enter transaction code **PO13** in the Command field and click .
2. Enter the Information and Communication Specialist II position number from the Data Set that was assigned to your student number.
3. Press **Enter**.
4. Use the **scroll bar** to locate and select the Overtime Compensation infotype.
5. Click the **Create** button.
6. Enter the correct **date** in the validity field. The end date should be 12/31/9999.
7. Enter **60** in the Comp Aging Limit field.
8. **Enter** and **Save**.
9. Use the same process to make the appropriate revision to the Holiday Payout infotype.
10. Use the **Display** button to review the infotypes.
11. You just discovered that the payout for the Overtime Compensation should have been immediate, not 60 days. Use the Copy function to make the appropriate correction to the infotype.

    NOTE: A message indicates that the old records will be deleted; click OK. Using the Copy function with the same effective date "erases" the old data and you are left with only the current corrected record.
12. Click the **PA313 Connect Pro Meeting** tab on your taskbar to return to the Connect Pro Meeting.
13. Click the Green Check to let the instructor know you have completed the exercise.

Questions

Answer the following questions.

Question 1

If the position revision should be back dated to a previous payroll period, what additional step would you take?

- ➢

Question 2

Which infotype can Time Administrators use with applicable subtypes to influence time management behavior for specific employees for specific periods of time?

- ➢

This exercise is complete.

Exercise 2.1: Maintain Master Data – Education (IT0022)

PA30

Student #	Personnel #
1	10000022
2	10000023
3	10000024
4	10000025
5	10000026
6	10000027
7	10000028
8	10000029
9	10000030
Instructor	10000011

Scenario

Today you received verification from the educational institution that Jimmy Chonez has a bachelor's degree.

Enter the verification on the employee's record.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. Enter transaction code **PA30** in the Command field on the Easy Access screen and click ✔.
2. Select the Jimmy Chonez assigned to your student number.
3. Select the **infotype** (IT0022) and applicable **subtype** (06 Bach deg).
4. Select **Copy**.

5. Enter the correct **date** (today) in the “Start” field.
6. Enter **12/31/9999** in the “to” field.

   NOTE: When verifying education, you are entering the date you received the verification as the Start date and the end of time as the To date. You are not entering the dates the employee indicated he or she attended school. See the *Enter Verified Education* Job Aid on OSC Training HELP website in the Personnel Administration > Job Aids folder for details.

7. Change the **Verified** field to indicate that it is no longer pending.
8. **Enter** and **Save**.
9. Click the **PA313 Connect Pro Meeting** tab on your taskbar to return to the Connect Pro Meeting.
10. Click the **Green Check** to let the instructor know you have completed the exercise.

This exercise is complete.

Exercise 2.2: Maintain Master Data – Monitoring of Tasks (IT0019)

PA30

Student #	Personnel #
1	80000286
2	80000287
3	80000288
4	80000289
5	80000290
6	80000291
7	80000292
8	80000293
9	80000294
Instructor	80000295

Scenario

Janet Thomas has indicated that she is an RN (Registered Nurse) on her application. This needs to be verified within 90 days of her hire date. Assume her hire date is today.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. Enter transaction code **PA30** in the Command field on the Easy Access screen, and click ✅.
2. Select the Janet Thomas in the Data Set assigned to your student number.
3. Select the **infotype** (IT0019) and applicable **subtype**.
4. Select **Create**.
5. Enter the applicable **date** in the Date of Task field.

6. Press **Enter**. Observe that the Reminder Date field automatically populated. You can accept this date or delete and enter a date.
7. Select **Edit > Maintain text** from the menu.

   NOTE: You can use this option to write notes on many infotypes.
8. Enter the date, your name and type the following note: *Need to verify RN credentials for Janet Thomas*.

   NOTE: Always begin each note with the date and your name. In your work environment, your note would include whatever information is required by your agency.
9. Click **Save** to save the note. Observe that the infotype now has an icon indicating a note exists.
10. Click **Save** again to save the infotype.
11. Click the **PA313 Connect Pro Meeting** tab on your taskbar to return to the Connect Pro Meeting.
12. Click the **Green Check** ✓ to let the instructor know you have completed the exercise.

Questions

Answer the following questions.

Question 1

Which infotype did you use to enter the reminder?

- ➢

Question 2

How do you receive the reminders?

- ➢

This exercise is complete.

Exercise 2.3: Maintain Employee Data – Delimit Infotypes

PA30

Student #	Personnel #
1	80001163
2	80001164
3	80001165
4	80001166
5	80001167
6	80001168
7	80001169
8	80001170
9	80001171
Instructor	80001172

Scenario

Marsha Sanders has been notified that the position she currently holds no longer requires that she have a pager and a cell phone. She turned in the cell phone and pager today. Delimit the items on the Objects on Loan infotype using the applicable subtype.

Before you begin the exercise, use the Overview function to view all of the items she has on loan. Observe that they all have an end date of 12/31/9999. After you complete the exercise, view the list again. Observe that the pager and cell phone now have a delimited end date.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. Enter transaction code **PA30** in the Command field on the Easy Access screen, and click  .

2. Select the Marsha Sanders that is assigned to your student number.
3. Enter **Objects on Loan** (0040) in the Direct Selection/Infotype field.
4. Press **Enter** to ensure that you have selected the correct item.
5. Select the **Delimit** button. You will receive either:
    a) A pop-up window if you started from the Easy Access screen requesting that you enter the delimit date. In the Delimit Date field, enter the date the item is to be delimited and click the check mark.
    b) The Delimit Objects on Loan screen if you did not start from the Easy Access. Enter the date in the Delimit Date field.

    Caution! Keep in mind that SAP delimits a transaction one day prior; therefore, if the employee turned in the item today, you would enter tomorrow's date. When SAP delimits the date, it shows that the employee was responsible for the item up through today. If you enter today's date, it shows the employee was responsible through yesterday.
6. Enter the **Delimit Date** (note: enter one day after it's been received). System automatically delimits one day prior.
7. Select the line item for the **pager**.
8. Click the **Delimit** button.
9. Repeat steps 5-8 to delimit the cell phone. (Remember to change the date to the one day after it has been received.)
10. Review the Objects on Loan with the applicable subtype to verify that the item is delimited on the appropriate date.
11. Click the **PA313 Connect Pro meeting** tab on your taskbar to return to the Connect Pro meeting.
12. Click the Green Check to let the instructor know you have completed the exercise.

This exercise is complete.

Exercise 2.4: Maintain Master Data – Bank Information (IT0009)

PA30

Student #	Personnel #
1	80000165
2	80000166
3	80000167
4	80000168
5	80000169
6	80000170
7	80000171
8	80000172
9	80000173
Instructor	80000174

Scenario

Rose Brown has informed you that in addition to her current bank she has a new bank to which she wants to direct 25% of her direct deposit into a checking account. In addition, she wants $100 to go to the new bank into a savings account. The remainder will go to the current bank in her checking account. The effective day is the first of next month.

Update the employee's OSC HR/Payroll SAP record to reflect the change to the banking information. Her new bank is Capital. The bank key is 053112123. Her checking account number is 24515487; savings is 1257843.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. Enter transaction code **PA30** in the Command field on the Easy Access screen, and click .
2. Select the **Rose Brown** in the Data Set assigned to your student number.
3. Select the **Bank Details** infotype and applicable subtype for other bank.
4. Select **Create**.
5. Enter the correct effective **date**.
6. Enter the **bank key** (routing number): 053112123.
7. Enter the checking **account number**: 24515487.
8. Indicate checking account in **bank control key**: 01.
9. Enter **25%** in Standard Percentage field.
10. **Enter** and **Save**.
11. Select **Copy** (observe that you are still on infotype 0009, subtype 1 and all of the data has defaulted).
12. The correct date should have defaulted; if not, then enter the **date**.
13. The **bank key** (053112123) remained the same.
14. Enter the savings **account number**: 1257843.
15. Indicate savings account in **bank control key**: 02.
16. Enter $100 in **Standard Value** field.
17. Remove **25** from the Standard percentage field.
18. **Enter** and **Save**.
19. Click the **PA313 Connect Pro meeting** tab on your taskbar to return to the Connect Pro meeting.
20. Click the **Green Check** to let the instructor know you have completed the exercise.

Questions

Answer the following question.

Question 1

True or False: You have to enter data on 0008 Basic Pay infotype to enter the new banking information?

-

Question 2

What adjustment did you have to make to indicate that the money should go into the savings account and not the checking account?

-

Question 3

What advice would you give an employee who is making a bank change request?

-

This exercise is complete.

Exercise 2.5: Maintain Master Data – Substitutions (IT2003)

PA30

Student #	Personnel #
1	10000022
2	10000023
3	10000024
4	10000025
5	10000026
6	10000027
7	10000028
8	10000029
9	10000030
Instructor	10000011

Overview

Be sure the read the information in the Student Guide concerning the Substitutions infotype.

Jimmy Chonez is being asked to work the day shift Saturday and Sunday next week which are normally his days off. His normal work schedule indicates that he gets night shift premium. For these two days, night shift premium should not be paid.

Create a Substitution for him for those two days and select the appropriate Daily Work Schedule (DWS). (D02N10_M)

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. Enter transaction code **PA30** in the Command field on the Easy Access screen, and click .

2. Select the same **Jimmy Chonez** that you used in previous exercise assigned to your student number.
3. Enter **Substitutions infotype** (IT2003) and press **Enter**.
4. Click **Create**. The subtype field should have defaulted to shift substitution. If necessary, enter the subtype code.
5. Enter the **From date** to reflect next Saturday's date and enter the Sunday date for the to date.
6. Enter **1D10** in the Daily work schedule field (use the matchcode to see all of the available options).
7. **Enter** and **Save**.
8. Click the **PA313 Conect Pro meeting** tab on your taskbar to return to the Connect Pro meeting.
9. Click the **Green Check** to let the instructor know you have completed the exercise.

This exercise is complete.

Exercise 2.6: Maintain Employee Data – Planned Working Time (IT0007)

PA30

Student #	Personnel #
1	10000022
2	10000023
3	10000024
4	10000025
5	10000026
6	10000027
7	10000028
8	10000029
9	10000030
Instructor	10000011

Scenario

Effective the first day of next month, Jimmy Chonez has requested and been granted a permanent move from his current shift to a 4-day work week **days**, 10 hours Tuesday – Friday with Monday, Saturday, Sunday off.

Instructions

Using knowledge that you learned in previous exercises, access the applicable infotype and update Jimmy's files.

1. A message displays to check the **Basic Pay** (IT0008) infotype. Press **Enter** to bypass the message.
2. The **Possible Subsequent Activities** pop-up displays. In this scenario, close the pop-up because this change does not affect enrollment into a new Retirement program. In your work environment, you would close or select as appropriate.
3. Click the **PA313 Connect Pro** meeting tab on your taskbar to return to the Connect Pro meeting.

4. Click the **Green Check** ✓ to let the instructor know you have completed the exercise.

This exercise is complete.

Exercise 2.7: Maintain Employee Data – Withholding W4 (IT0210)

PA30

Student #	Personnel #
1	80000145
2	80000146
3	80000147
4	80000148
5	80000149
6	80000150
7	80000151
8	80000152
9	80000153
Instructor	80000154

Scenario

Effective today, Leona Grayson would like to have her federal and state withholding changed from 0 allowances to 1. In addition, she does not want any additional money withheld.

Instructions

Using knowledge that you learned in previous exercises:

1. Select the appropriate infotype and subtype.
2. Make the changes in the appropriate fields.
3. Save the changes.
4. Click the **PA313 Connect Pro** meeting tab on your taskbar to return to the Connect Pro meeting.
5. Click the **Green Check** ✓ to let the instructor know you have completed the exercise.

This exercise is complete.

Exercise 2.8: Maintain Employee Data –Benefits (IT0378)

PA30

Student #	Personnel #
1	80000206
2	80000207
3	80000208
4	80000209
5	80000210
6	80000211
7	80000212
8	80000213
9	80000214
Instructor	80000215

Scenario 1

Emily Stafford has provided documentation that she just had a daughter who needs to be added to her benefit plan. The baby was born the first day of the current month

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. Enter transaction code **PA30** in the Command field on the Easy Access screen, and click **Enter**.
2. Use the **Emily Stafford** assigned to your student number.
3. Enter **Adjustment Reasons infotype** (IT0378), subtype **NEWB**.
4. Click **Create**.
5. Change the **Start date** to reflect the child's birth.

6. Press **Enter**. If the Start date was changed from today's date, the Deviation from end data window is displayed informing you that the end date is going to change to within 30 days of the Start date. This is important because the employee only has 30 days to enroll the child.
7. Click **Yes**.
8. Click **Save**.
9. Click the **PA313 Connect Pro** meeting tab on your taskbar to return to the Connect Pro meeting.
10. Click the **Green Check** to let the instructor know you have completed the exercise.

Questions

Answer the following questions.

Question 1

What infotype did you have to create first before the new dependent could be added?

- ➢

Question 2

What advice would you give employees about how to get the life event processed on their family member/dependent record?

- ➢

This exercise is complete.

Exercise 3.1: Run the Employee List Report

Scenario

You want to see a list of employees who are assigned to Personnel Area 4601.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

NOTE: In training, there are 20 iterations of the same employee which you obviously would not have in your work environment.

1. From the Easy Access screen, select *SAP menu > Human Resources > Personnel Management > Administration > Infosystem > Reports > Employee > Employee List.*
2. Leave the default time frame to "**Today**".
3. Look in the Selection area of the screen. You will add or remove fields as needed.
4. Click the **Further Selections** button and do either both or one of the following as necessary:
   a) If Org Assignment, Personnel Subarea, Employee Group and Employee Subgroup are on the screen, select them from the right column, and then remove them.
   b) If Personnel Area is not on the screen, select from the left column and add it.
5. Click the **Continue** button.
6. In the Personnel Area field enter the following:
   - 4601
7. Click .

   NOTE: See *Running Reports in the Background* for information on how to run reports in your work environment.

This exercise is complete.

Run the PA Workflow Report

ZPA0189

Scenario

You will not run this report in class. The steps are presented here for informational purposes only.

You need to see if there are any Suspension and Reallocation PA Actions for Org Unit 4601 (Cultural Resources) awaiting approval.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. From the Easy Access screen, enter **ZPA0189** into the Command Field.
2. Enter and Execute.
3. In the Action Type field, use the matchcode to select the codes for **Suspension to Reallocation**.
4. In the Personnel Area field, use the matchcode to select **Cultural Resources**.
5. **Enter** and **Execute**.

   NOTE: A job aid is available at the OSC Training HELP website describing details how to run, change layout, save layout as a variant and use the variant. In addition, the report is covered in the course *WF220 BEACON SAP Workflow*.

Running Reports in the Background

Instructions

It is a best practice to run reports in the background to prevent the system from timing out. The steps are included below, however, you will not perform this exercise in class.

1. Enter the transaction code for the report.
2. Create a one-time set-up on SAP:
   a) Click **Program > Execute in Background** from the menu. Output device should be LOCL.
   b) Click **Properties**.
   c) Double-click "**time of printing**". This causes the bottom of the popup to display a new line.
   d) At the bottom of popup, select "**show selected print parameters on selected screen**".
   e) Click the **green check**.
   f) On the background print parameters pop-up, click the **green check**.
   g) At the Print time pop-up, click the **Red X.**
3. Process the report and get the layout as you want it.
4. Click **Program > Execute in Background** from the menu.
5. At the "time of print" field, click the drop-down and select "**Send to SAP spooler only for now**".
6. Click the **Green check**.
7. At the Start time pop-up, either click "**immediate**" to see the report now or "**date and time**" to schedule it for another day.
8. Click **Save**. A message displays at the bottom of the screen indicating the report (job) is scheduled.
9. Use transaction code **SM37** to see the reports (jobs) you have run.
   a) The *from* and *to* dates default for today's date. If you are looking for a report from a date other than today, you will need to put those dates in the date field.
   b) Select the **Job Status** you wish to see (Released, Ready Active, Finished, Canceled).
   c) Click **Execute**.

d) At the Job Overview screen, select the job (report) you want to view. You can use the Refresh button if you don't see a report you just sent to spool.

e) When the status indicates finished, select the job and click "**display spool list**" 

.

f) On the Output Controller: List of Spool requests screen, click the report you want.

g) Select the **eyeglasses**. You can then:

   i. View the report online.

   ii. Use the print icon to send to printer.

   iii. Use the "**save to local file**" icon to send to Excel spreadsheet.

h) The report stays in system for 8 days. Keep in mind that the report is data as of the date you ran the report—if running it again a few days later and changes have been made to data, the changes won't show on report. To see the changes on the report, you would re-execute a new report and follow the same steps to print in background.