



Transfer Position (Action 113)

Change Record:

Change Date: 8/21/2013	Changed by: d. lyle
Changes:	<p>New format and screen captures</p> <p>New Additional Resources list at end of document</p> <p>Business Process Procedure Overview:</p> <ul style="list-style-type: none"> • Added new last Par. - <i>Agency to Agency transfers must be completed by BEST Shared Services OM team.</i> <p>Step 4 –</p> <ul style="list-style-type: none"> • New Note: The OM Action should precede the PA Action. <p>Step 7 –</p> <ul style="list-style-type: none"> • New Info box: <i>The PCR date cannot be changed. If a new date is needed, you must begin a new PCR.</i> <p>Step 8 – Data Table:</p> <p><i>Org Unit Field</i></p> <ul style="list-style-type: none"> • NOTE: <i>You must change the Org unit or you will receive a hard stop.</i> <p><i>Employee Group Field</i></p> <ul style="list-style-type: none"> • Description added: <i>An organizational entity which is governed by specific personnel regulations. An employee group is divided into several employee subgroups.</i> <p><i>Employee Subgroup Field</i></p> <ul style="list-style-type: none"> • Description revised: <i>Code on position identifying the FLSA status and full-time equivalency</i> <p>Step 9 – Text</p> <p><i>Header default values</i></p> <ul style="list-style-type: none"> • Bullet 2: added <i>after SAVE</i> at end of text line • Bullet 7: added <i>if filled</i> at end of text line • Added new Workflow (WF) Status codes and descriptions <p>New Step 10-12 – Accessing the Address tab and subtype</p> <p>Step 13 – Added field descriptions on Data table</p> <p>Step 17 – Added infotype descriptions to list</p> <ul style="list-style-type: none"> • Callback (IT9012) • Extended Duty (IT9016)

	<ul style="list-style-type: none"> GAP Hours (IT9017) <p>Step 21 – New Info text box: Notes and comments on PCRs</p> <p>Step 24 – Revised text on last paragraph: <i>Once position data has been saved, it is in Planned status on the position.</i></p>
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Trigger:

There is a need to move an existing position from one Organizational Unit to another Organizational Unit within an Agency.

Business Process Procedure Overview:

This action will move a position from one Organizational Unit to another Organizational Unit. The move may involve a change in the Cost Distribution, Organizational Unit, or the County. The position number does not change.

Agency to Agency transfers must be completed by BEST Shared Services OM team.

Tips and Tricks:

See the *OM Tips and Tricks Job Aid* for a fuller listing of Best Practices and Tips & Tricks. The job aid is located on the Training Help website <http://www.osc.nc.gov/training/osctd/help/> in the following folder: **Organizational Management > Job Aids.**

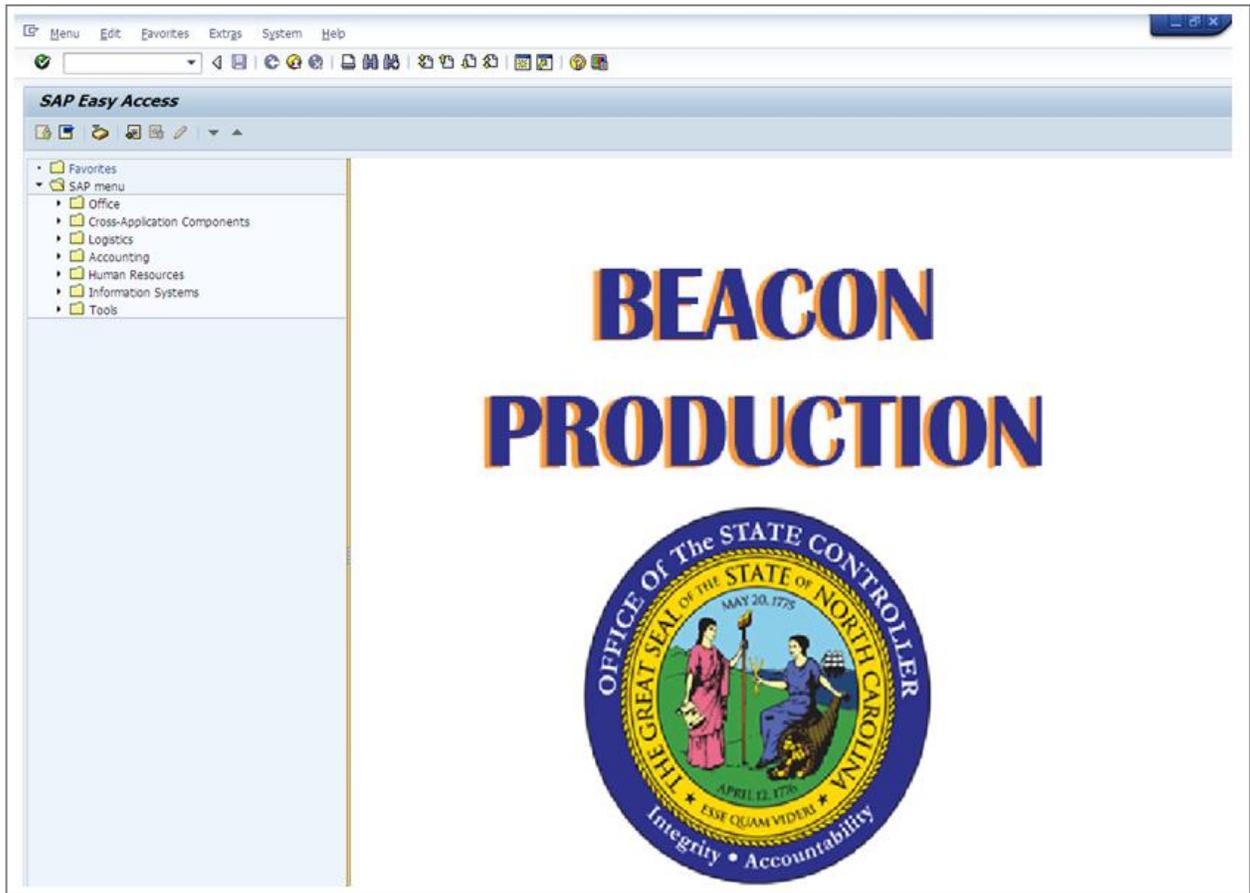
The following instructions only take the Initiator through creating a Transfer Position Action (113) PCR, not through the approval process. See the individual instructions per approver level for more details.

- Copy**  is to be used most of the time. This will delimit the existing record and create a new record with the start date given. Copying keeps a history of what the record used to be.
- Change**  is only to be used if you make a spelling or other simple error, and want to change the record. There is no history tracked on what the record used to be if you use the change functionality.

Access Transaction:

Via Menu Path:	This transaction code is not on the menu path. Enter the transaction code in the Command Field (white field in the upper left hand corner of the screen. If the Command field is not visible, click the gray triangle in this area to display it). Click Enter once the transaction code has been entered.
Via Transaction Code:	ZOMA069

PROCEDURE



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: ZOMA069

2. Click the **Enter**  button.

 **Information**

You may want to enter this transaction code in your Favorites folder.

- Choose **Favorites > Insert Favorites**
- Type in **ZOMA076**.
- Click **Enter**.

To see the transaction code displayed in front of the link in your favorites:

- Choose **Edit > Settings**.
- Place a **check** next to Display Technical Name.
- Click **Enter**.

3. Update the following field:

Field Name	Description	Values
Action	A one to four character code that represents an action. An action is a series of procedures that must be completed in order to achieve a specific objective.	Enter value in Action. Example: 113

4. Click the **Enter**  button.

NOTE: The action number to transfer a position is 113. Use the matchcode search for additional OM action options available from this transaction as appropriate.

Clicking Enter will validate the action you have requested and display the date fields for entry.

5. Update the following fields:

Field Name	Description	Values
Position	The SAP eight-digit position code (perform a search for the correct position title) for the position to be maintained	Enter value in Position. Example: 60089998

Field Name	Description	Values
Valid from	<p>Beginning date of the organizational assignment which identifies the start of a validity period. For existing Legacy positions, the start date was established as 01/01/1900.</p> <p>NOTE: The Validity period, also referred to as the effective date range, identifies the lifespan assigned to an object or an infotype record, or the period of time that these items "exist". Validity periods consist of a start date and end date.</p>	<p>Enter value in Valid from.</p> <p>Example: 09/01/2013</p>

6. Click the **Enter**  button to validate that this is the position with which you wish to work..



Position Action

Position

Action Position Transfer

Position Office Assistant V

Valid from to

Enter the appropriate effective date value for the Position Transfer action. The Valid from date will serve as the effective date of the position action. The Valid to date will always default the end date to 12/31/9999.

The beginning date should be the date for the Position Transfer to be valid (it can be dated in the past or in the future). The format can be mm/dd/yyyy, mmdyyy, or mm/dd/yy.

If the position is held by the employee, the effective date for this position action must correspond with the effective date for the corresponding personnel action. Please contact the appropriate HR staff for your agency to coordinate the required OM and PA actions. Use either the PPOSE transaction or the PO13 transaction to determine if the position is currently held by an employee.

NOTE: The OM Action should precede the PA Action.

7. Click the **Create (F5)**  button.

This PCR number does not mean the form has been submitted to workflow, you must still initiate workflow to begin the process. If you have not yet initiated the workflow, you may use the PCR number to make changes and save the latest form.

 Information	<p>The PCR date cannot be changed. If a new date is needed, you must begin a new PCR.</p>
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Once a position request has been submitted to workflow (it has received a PCR number and has been submitted to workflow), it may not be changed until the PCR number has gone through the entire workflow approval process and either successfully been approved, rejected, or cancelled.

Position Transfer - CREATE

Initiate Work Flow

Position Header

Position: 60095601 Program Assistant IV Org Unit: 20010229 CR CDS A&H HIS RES HPO Grants &
 PCR Number: Reports To: 60083615 Historic Preservation/restora Supvr
 Valid from: 09/01/2013 to 12/31/9999 Supervisor: WF Status:
 Holder: Personnel area: 4601 Cultural Resources

Current Values **New Values**

Org Unit: 20010229 CR CDS A&H HIS RES HPO Gra...
 Reports to: 60083615 Historic Preservation/restora S...
 Personnel Area: 4601 Cultural Resources
 Personnel Subarea: NC07 7day Temp
 EE Group: 0 Supplemental Staff
 EE Subgroup: 68 Temp FT S-FLSAOT
 County: 092 Wake

Address **Time**

Subtype: 9001 Main Add... 1 Active

Address suppl.: Archives & History
 House no/street: 109 E Jones Street House number:
 PCode/City: 27601 Raleigh

8. Update the following fields:

Field Name	Description	Values
Org Unit <i>NOTE: You must change the Org unit or you will receive a hard stop.</i>	Contains the eight-digit number that represents the organizational unit the position belongs to	Enter value in Org Unit. Example: 20000862
Reports to	Contains the eight-digit position number that represents the supervising (chief) position for the organizational unit	Enter value in Reports to. Example: 60008615

Field Name	Description	Values
Personnel Area	Code identifying the agency and division associated with the position	Enter value in Personnel Area. Example: 4601
Personnel Subarea	Code that defines various working schedules so that Time Management can define groups of specific time entry rules. An example is: <ul style="list-style-type: none"> • NC01 7 day Norm - See the <i>Personnel Area and Subarea</i> job aid (available on the OSC Training HELP website) for detailed information concerning the relevant PSAs associated with each Personnel Area 	Enter value in Personnel Subarea. Example: NC01
Employee Group	An organizational entity which is governed by specific personnel regulations. An employee group is divided into several employee subgroups.	Select from Employee Group list box. Example: O – Supplemental Staff
Employee Subgroup	Code on position identifying the FLSA status and full-time equivalency	Enter value in Employee Subarea. Example: G8
County	Code identifying the county	Enter value in County. Example: 092

9. Click the **Enter**  button.

Position Transfer - CREATE

Initiate Work Flow

Position Header

Position	60089998	Office Assistant V	Org Unit	20000877	OSBM ADMIN DEP Human Resources
PCR Number			Reports To	60008577	Human Resources Director
Valid from	09/01/2013	to 12/31/9999	Supervisor		
Holder			WF Status		
Personnel area	0310	State Budget & Management			

	Current Values	New Values
Org Unit	20000877 OSBM ADMIN DEP Human Res...	20000862 <input type="checkbox"/> JOV ADMIN Comm Press Office
Reports to	60008577 Human Resources Director	60008615 Asst To Lt Gov For Research &...
Personnel Area	0310 State Budget & Management	0301 Governor's Office
Personnel Subarea	NC07 7day Temp	NC07 7day Temp
EE Group	0 Supplemental Staff	0 Supplemental Staff <input type="checkbox"/> Supplemental Staff
EE Subgroup	GA Temp PT N-FLSAOT	G8 Temp FT S-FLSAOT
County	092 Wake	092 Wake

Address **Time**

Subtype: 9001 Main Add... 1 Active

Address suppl.

House no./street House number

PCode/City Raleigh

Country US USA

Region NC North Carolina

Telephone no.

Fax number

The system will copy the existing data from the position and default it on screen.

The Header section will default values in these fields:

- Organizational Unit Object Id and Abbreviation
- PCR Number (Number generated by the system for the position action after SAVE)
- Reports To (Supervisor's personnel number and name)
- Valid from (Effective Date based on the value entered on the prior screen)
- Valid to (End date which defaults as 12/31/9999)
- Supervisor (Position's Supervisor)
- Holder (Person assigned to the Position if filled)

- Workflow (WF) Status
 - **N** In Process
 - **R** Rejected
 - **C** Canceled
 - **A** Approved
 - **D** Created
 - **M** Completed
- Personnel area (Agency)

On the General tab, the system will display proposed defaults on the left side of the screen to represent the "current" value for the position. This will include:

- Org Unit
- Reports To (Supervisor's personnel number and name)
- Personnel Area (Agency)
- Personnel Subarea
- Employee group (Subject/Not subject to FLSA and overtime provisions)
- Employee subgroup (Work schedule grouping)
- County

NOTE: The data used in this example is provided for sample purposes only. The data will change depending on the Agency and specific position being transferred.

BEST BUSINESS PRACTICE: The best practice is to enter any data as appropriate, review all data, and click Enter to allow the system to validate the data.

Several fields on this screen are mandatory. The system will not let you continue if you have not provided data for the mandatory fields. If you are unsure which fields are mandatory, click Enter, and the system will prompt you for information in the mandatory fields.

10. Click the **Address** tab.
11. Click the drop-down list and select the appropriate **subtype** (Main, Mailing, or Courier).
12. Click the **Get Address** button prior to entering an address.

Verify the data on the Address tab is correct for the new location of the position, or if appropriate change the information.

13. Enter the new address of the position in the Address field (Main Address subtype) as follows:

Field Name	Description	Values
House no/Street	The street name and number. Enter the street address (up to a maximum of 30 characters).	Enter value in House no/street. Example: 310 N Blount St
PCode/City	The postal (zip) code for the address (street and city).	Enter value in PCode/City. Example: 27601 / Raleigh
Telephone no.	Phone number where position resides	Enter value in Telephone no. Example: 919-733-7350
Fax number	Fax number where position resides	Enter value in Fax Example: 919-733-6595

14. Click the **Enter**  button to display and validate your entries.

You may save this information as many times as you like; each time you will receive a confirmation of the Save. You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.

NOTE: On an OM workflow item, you will not see the Initiate Workflow button until you have saved the information at least once.

15. Click the **Time**  tab button.

16. Update the following field:

Field Name	Description	Values
Night Shift Prem Rate	Pay rate increase for Night Shift premium. If OSP has approved a rate other than the default of 10%, the rate as a percentage must be entered in the rate field.	Enter value in Night Shift Prem Rate. Example: 10

17. Click the **Enter**  button.

The Time tab contains the fields required for time entry and payroll calculation rules. A position can have one or more fields. The Premium rates are determined from the data saved on the Position in the HR/Payroll system, not what a person enters on their time sheet, so the person hired into this position will automatically receive the premiums which are designated on this position.

NOTE: In this example we have changed the Night Shift Premium from 0% to 10%.

- **Overtime Compensation (IT9005)** - Stores settings related to overtime compensation.
 - If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record (which is this area).
 - If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.).

- If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.
- **Holiday Payout Period (IT9006)** - Indicates if overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-Subject only) at a point earlier than 12 months from when it was earned. The Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). The default is 365 days. If no record exists, the default value of 365 applies. If it is to be paid out immediately, the Immediate Payout checkbox should be checked.
- **Night Shift Prem Rate (IT9007)** - Pay rate increase for Night Shift premium. If OSP has approved a rate other than the default of 10%, the rate as a percentage must be entered in the rate field.
- **Evening Shift Premium (IT9008)** - Stores settings for positions that are eligible for evening shift premium. OSP approved rates other than the default of 10% must be entered in the rate field.
- **Weekend Shift Premium (IT9009)** - Stores settings for positions that are eligible for weekend shift premium. The OSP approved rate other than the default of 10% must be entered in the rate field.
- **Holiday Premium Rate (IT9010)** - Pay rate increase for Holiday Pay. The OSP approved rate other than the default of 50% must be entered in the rate field.
- **On-call (IT9011)** - Stores settings for positions that are eligible for On-Call compensation. The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSP approved on-call rate.
- **Callback (IT9012)** - Stores settings for positions that are eligible for Callback compensation. The decision to pay or award comp time is determined by the “Immediate Payout” checkbox.
- **Extended Duty (IT9016)** - Stores settings for positions that are eligible for extended duty
- **GAP Hours (IT9017)** - Positions eligible for Gap Hours Comp must have a valid IT9017 record. The decision to pay versus comp time is determined by the existence of the 9017 infotype. Gap Hours are additional hours for Subject- FLSA employees. The “Additional hours” are those hours caught in the gap between the minimum hours of work required and the overtime threshold. These hours are currently being paid at an hour-for-hour rate for Subject-FLSA employees.

BEST BUSINESS PRACTICE: The best practice is to enter any data as appropriate, review all data, and click Enter to allow the system to validate the data.

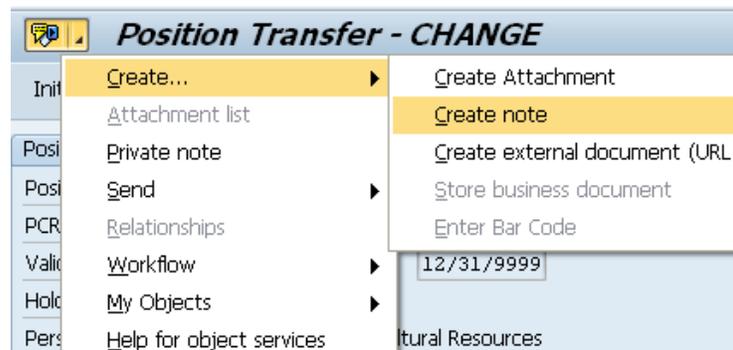
Address		Time	
Overtime Compensation(9005)			
Immediate Payout	<input type="checkbox"/>	<input type="checkbox"/>	
	OR	OR	
Comp Aging Limit	<input type="text" value="365"/> Days	<input type="text" value=""/> Days	
Delimit 9005	<input type="checkbox"/>		
Holiday Payout Period(9006)			
Immediate Payout	<input type="checkbox"/>	<input type="checkbox"/>	
	OR	OR	
Comp Aging Limit	<input type="text" value="365"/> Days	<input type="text" value=""/> Days	
Delimit 9006	<input type="checkbox"/>		
Night Shift Premium(9007)			
Night Shift Prem Rate	<input type="text" value="0"/> %	<input type="text" value="10"/> %	
Delimit 9007	<input type="checkbox"/>		
Holiday Premium Rate(9010)			
Holiday Premium Rate	<input type="text" value="50"/> %	<input type="text" value=""/> %	
Delimit 9010	<input type="checkbox"/>		
On-Call(9011)			
On-Call Comp Accrued	<input type="checkbox"/>	<input type="checkbox"/>	
On-Call Rate	<input type="text" value="\$ 0.00"/>	<input type="text" value=""/>	
Delimit 9011	<input type="checkbox"/>		
Callback(9012)			
Immediate Payout	<input type="checkbox"/>	<input type="checkbox"/>	
	OR	OR	
Comp Aging Limit	<input type="text" value="0"/> Days	<input type="text" value=""/> Days	
Delimit 9012	<input type="checkbox"/>		

18. Verify the information is correct (prior to saving the record).

19. Click the **Save (Ctrl+S)**  button.

NOTE: On an OM workflow item, you will not see the Initiate Workflow button until you have saved the information at least once.

You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.

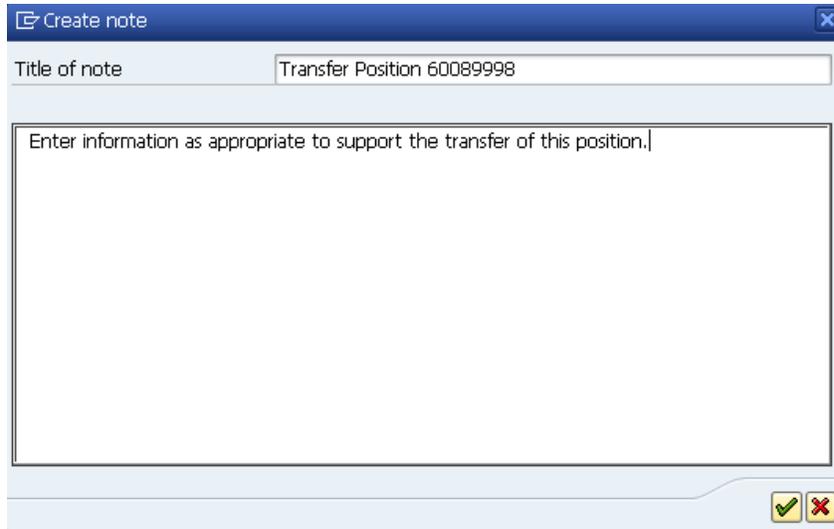


20. Click the **Services for Objects**  button.

21. Click **Create... >> Create note.**

You may enter any information that would be useful to the approvers down the line in the approval process using the notes area, or attachment area. If you just need to type some information in, or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.

 Information	<p>Your Notes on PCRs stay on the PCR. If you need your note on the position, it must be entered on the position. to enter this transaction code in your Favorites folder.</p>
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22. Update the following fields:

Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note. Example: Transfer Position 60089998
Long text	An open text field	Enter value in Long text. Example: text as appropriate

23. Click the **Copy (Enter)**  button.

Position Transfer - CREATE

Initiate Work Flow

Position Header

Position	60089998	Office Assistant V	Org Unit	20000862	GOV ADMIN Comm Press Offi
PCR Number	5000002040		Reports To	60008615	Asst To Lt Gov For Research &
Valid from	09/01/2013	to 12/31/9999	Supervisor		
Holder			WF Status	D	Created
Personnel area	0301	Governor's Office			

	Current Values		New Values	
Org Unit	20000877	OSBM ADMIN DEP Human Res...	20000862	GOV ADMIN Comm Press Office
Reports to	60008577	Human Resources Director	60008615	Asst To Lt Gov For Research &...
Personnel Area	0310	State Budget & Management	0301	Governor's Office
Personnel Subarea	NC07	7day Temp	NC07	7day Temp
EE Group	0	Supplemental Staff	0	Supplemental Staff
EE Subgroup	GA	Temp PT N-FLSAOT	G8	Temp FT S-FLSAOT
County	092	Wake	092	Wake

24. Click the **Initiate Work Flow**  button.

Select the Initiate Workflow button to send the Transfer Position Action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).

If you do not want to initiate workflow at this time, you may access the Transfer Position action using the **Change** mode after you have entered both the original validity dates and the position number from transaction code ZOMA069 at any point in the future, up until the request has been submitted to workflow.

Notice the **Save** confirmation at the bottom of the screen. You may adjust and save the data as many times as you like prior to submitting to workflow. Once you Initiate Workflow, changes may not be made to this action.

This position data in the HR/Payroll system is held in the Planned status until the workflow has gone through the entire approval process. If the workflow is approved, all of the data on the various infotypes will be moved into the Active status on the position. If the workflow is rejected or cancelled, the data will be moved into the Rejected status on the position.

Once position data has been saved, it is in Planned status on the position.

Position Action

Position

Action	113	Position Transfer
Position	60089998	Office Assistant V
Valid from	09/01/2013	to 12/31/9999

25. Click the **Display (F7)**  button.

Once the PCR has been submitted, you will only be able to display the data (including any notes and attachments which may have been saved on the PCR).

 **Position Transfer - DISPLAY**

- Create...
- Attachment list**
- Private note
- Send
- Relationships
- Workflow
- My Objects
- Help for object services

Posi
Posi
PCR
Valid
Hold
Pers

Office Assistant
12/31/9999
governor's Office

26. Click the **Services for Objects**  button.

27. Click **Attachment list**.

The PCR information is displayed. At any time, to display the notes/attachments on this PCR, choose the Services for Objects button and if the Attachments option is valid, there is at least one attachment available.

Service: Attachment list

AttachmentForPCR -5000002040 - Position:60089998

Icon	Title	Creator Name	Created On
	Transfer Position 60089998	Workflow Initiator	08/21/2013

28. Click the **Note title**  **Transfer Position 60089998** button.

29. Click the **Display (F7)**  button.

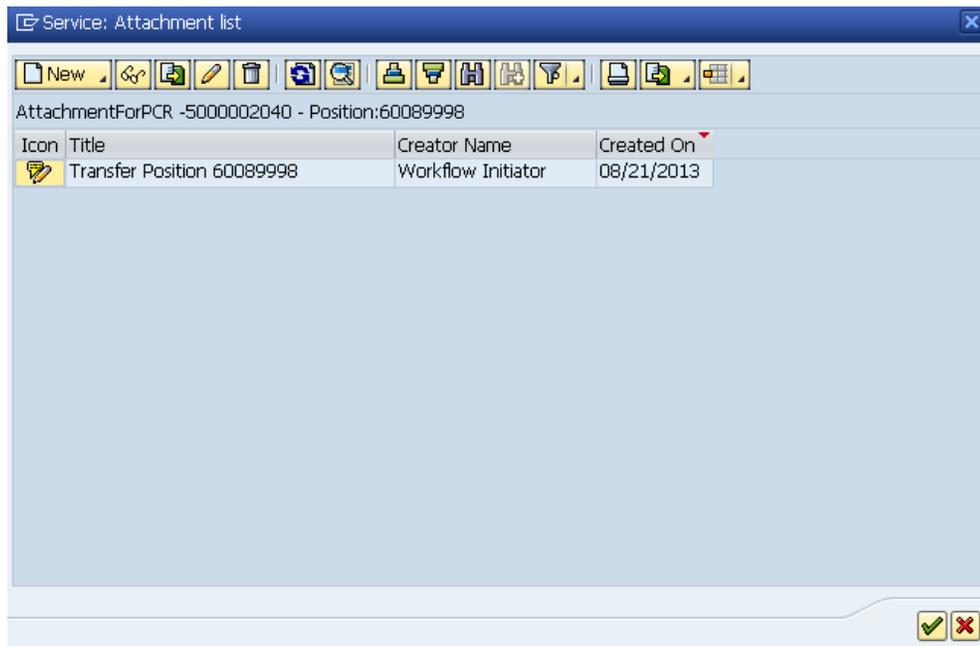
If you receive a window requesting you to choose between PCR attachments, choose the attachment corresponding to the PCR number with which you are working. This extra window does not normally display.

If multiple notes and/or attachments have been added to this PCR, they will be listed here. This is where you would display and copy the data if you wanted to also attach the notes/attachments to the corresponding Action once approved.



30. Click the **Copy (Enter)**  button.

Review the information as appropriate, and close the window when complete. This text may be copied using CTRL-C and pasted into another note attachment to an Action.



31. Click the **Continue (Enter)**  button.

Position Transfer - DISPLAY

Position Header

Position	60089998	Office Assistant V	Org Unit	20000862	GOV ADMIN Comm Press On
PCR Number	5000002040		Reports To	60008615	Asst To Lt Gov For Research
Valid from	09/01/2013	to 12/31/9999	Supervisor		
Holder			WF Status	N	In Process
Personnel area	0301	Governor's Office			

Current Values		New Values	
Org Unit	20000877 OSBM ADMIN DEP Human Res...	20000862	GOV ADMIN Comm Press Office
Reports to	60008577 Human Resources Director	60008615	Asst To Lt Gov For Research & ...
Personnel Area	0310 State Budget & Management	0301	Governor's Office
Personnel Subarea	NC07 7day Temp	NC07	7day Temp
EE Group	0 Supplemental Staff	O Supplemental Staff	Supplemental Staff
EE Subgroup	GA Temp PT N-FLSAOT	G8	Temp FT S-FLSAOT
County	092 Wake	092	Wake

Cost Distribution | Address | Time

32. Click the **Back (F3)**  button.

Position Action

Position

Action	113	Position Transfer
Position	60089998	Office Assistant V
Valid from	09/01/2013	to 12/31/9999

33. Click the **Back (F3)**  button.

The system task is complete.

ADDITIONAL RESOURCES

Training HELP website: <http://www.osc.nc.gov/training/osctd/help/>

Links to:

Student Guides	OM210: Organizational Management for Agencies <ul style="list-style-type: none"><i>Training HELP website > Student Guides</i>
Job Aids	OM Fields <ul style="list-style-type: none"><i>Training HELP website > OM > Job Aids</i>