



HRG Training

Tell me about yourself:

- Name
- Responsibility and length of service
- What are your class expectations?



Please:

- Use the sign-in sheet
- Silence phones and Blackberries
- Refrain from email and internet use
- Leave the room tidy and ready for the next class
- Participate – This is your class!

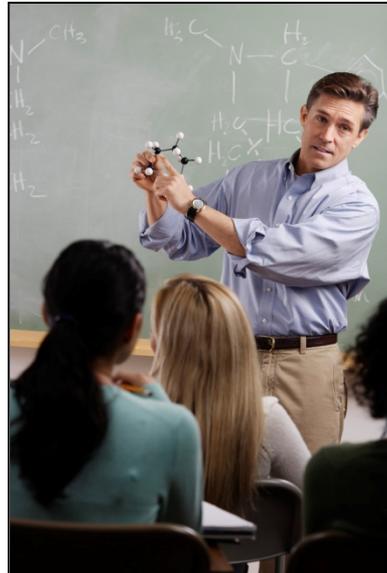


What Class Is and What Class Is Not

Class Is...	Class Is Not...
<p>To give you the basic knowledge and skills you need to perform your tasks in KHRIS as well as to perform any related business processes</p>	<p>Designed for your specific division or agency procedures and policies</p>
<p>To demonstrate how you can further develop your skills, by using the classroom materials and the end-user training materials website to continue your KHRIS education after training is completed</p>	<p>Inclusive of all of the scenarios you encounter in your current job role</p>
<p>Designed with the primary goal of making you effective on the tasks you will use most frequently in the system</p>	<p>Designed to cover agency-specific tasks done in KHRIS very sporadically, such as quarterly or annually</p>



Concepts
(Tell Me)



Demonstrations
(Show Me)



Practice
(Let Me)



KHRIS Terminology Review

For the Commonwealth of Kentucky, the SAP system is called



Kentucky Human Resource Information System

Why use SAP?

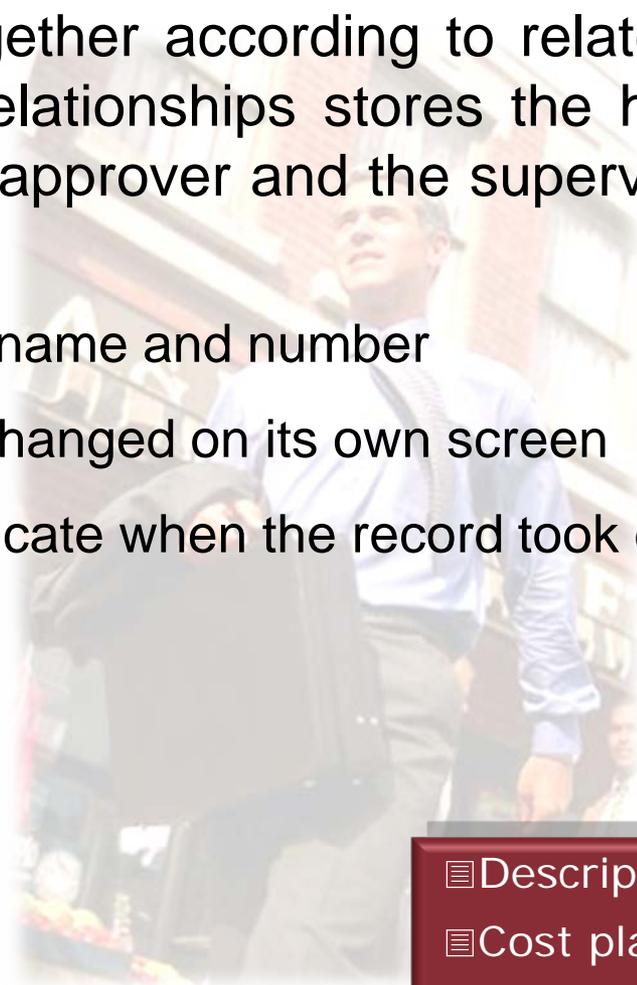
- Contemporary
- Integrated system
- Easy access to information
- Reduction of manual tasks and less paperwork

Master data is centrally stored employee information that is shared across modules within KHRIS. This information typically remains the same over a long period of time.



Infotypes (ITs) group data together according to related subject matter. Example: IT 1001 Relationships stores the holder, org assignment qualifications, time approver and the supervisor of the position.

- Each IT is identified by a unique name and number
- Data is created, displayed, and changed on its own screen
- ITs display validity dates that indicate when the record took effect and when it ends



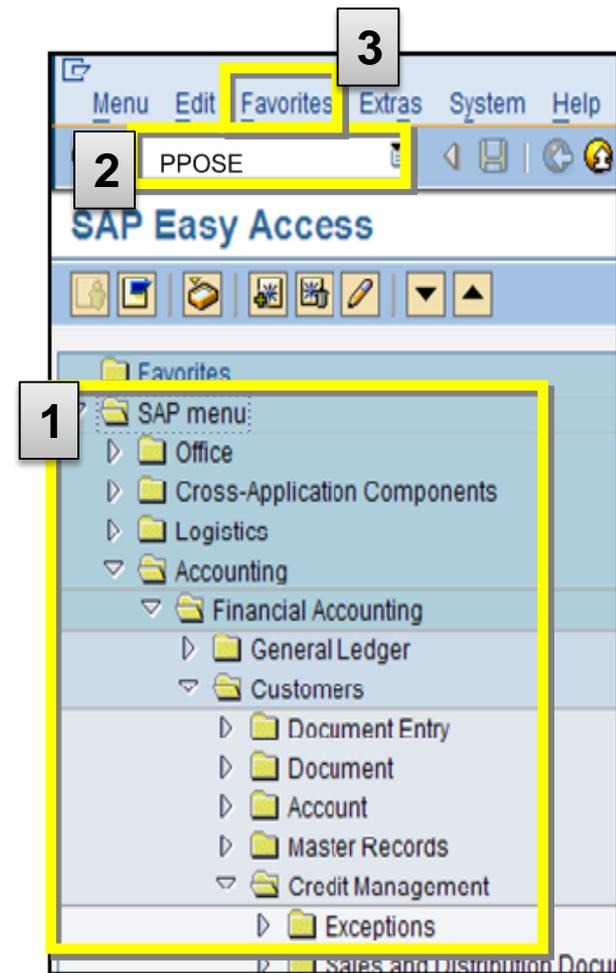
- ☐ Description
- ☐ Cost planning
- ☐ Address, etc.

Transactions

Transactions are used to display data in different formats in KHRIS.

There are three methods to access transactions.

- Method #1, Menu Path – By using a menu path, we can access transactions by clicking the arrows, or nodes, next to the folders to reveal the actual transaction steps for processing. This is known as a tree structure.
- Method #2, Transaction Code – We can enter a transaction code in the Command field, but we have to know the transaction code we want to access
- Method #3, Favorites – We can create a Favorites list of commonly used transactions



Access to KHRIS is based on ***security roles***.

- Security roles are used to set up the activities that a user can perform in KHRIS
- These roles give users access only to the items they need, and not the entire system
- Security roles are based upon a user's organization, agency and assigned tasks
- Security roles are assigned to a position; not the person



Every action and IT in KHRIS must have a beginning (effective) and ending date.

- When we create or revise a record, we are required to enter an effective date
- KHRIS automatically assigns an end date of 12/31/9999, or “infinity”
- When we revise a record, the end date of the previous record will populate automatically based on the effective date of the new record



Validity Periods

Validity periods are the start and end dates that define the life span of the record.

Display Object - IT 1000

Job: 96110V000101 Administrative Specialist I
Planning Status: Active
Validity: 01/01/1900 to 12/31/9999 [Change Information](#)

Start Date (points to 01/01/1900)
End Date (points to 12/31/9999)

Object - IT 1000
Object abbr.: 96110V0001...
Object name: Administrative Specialist I
Language Key: English

Display Relationships - IT 1001

Additional data

Job: 96110V0001... Administrative Specialist I
Planning Status: Active
Valid from: 01/01/1900 to 12/31/9999 [Change Information](#)

Start Date (points to 01/01/1900)
End Date (points to 12/31/9999)

Relationship type/relationship: A 031 Requires

Related Object
Type of related object: Qualification
ID of related object: 50000942
Abbreviation: properiod
Name: Probationary Period

Questions and Answers





Organizational Management

Lesson 1: OM Overview

Lesson 2: Organizational Units

Lesson 3: Jobs

Lesson 4: Positions

Lesson 5: Reporting

Wrap-up

By the end of this course participants will be able to:

- Define Organizational Management
- Describe the org management structure
- Explain relationships and inheritance to org management objects
- Identify object infotypes
- Display organizational structure, jobs, and positions
- Print a Job Specification
- Print a Position Description
- Maintain relationships on a position
- Identify Human Capital Management Processes and forms
- Describe the workflow approval process
- Navigate reports



Organizational Management Overview

Lesson 1

Lesson 1 OM Overview

Lesson 2: Organizational Units

Lesson 3: Jobs

Lesson 4: Positions

Lesson 5: Reporting

Wrap-up

By the end of this lesson participants will be able to:

- Explain and access KHRIS transactions
- Define org management
- Define key org management terms
- Explain the importance of relationships
- Discuss the relevance of inheritance with org management
- Display org structures

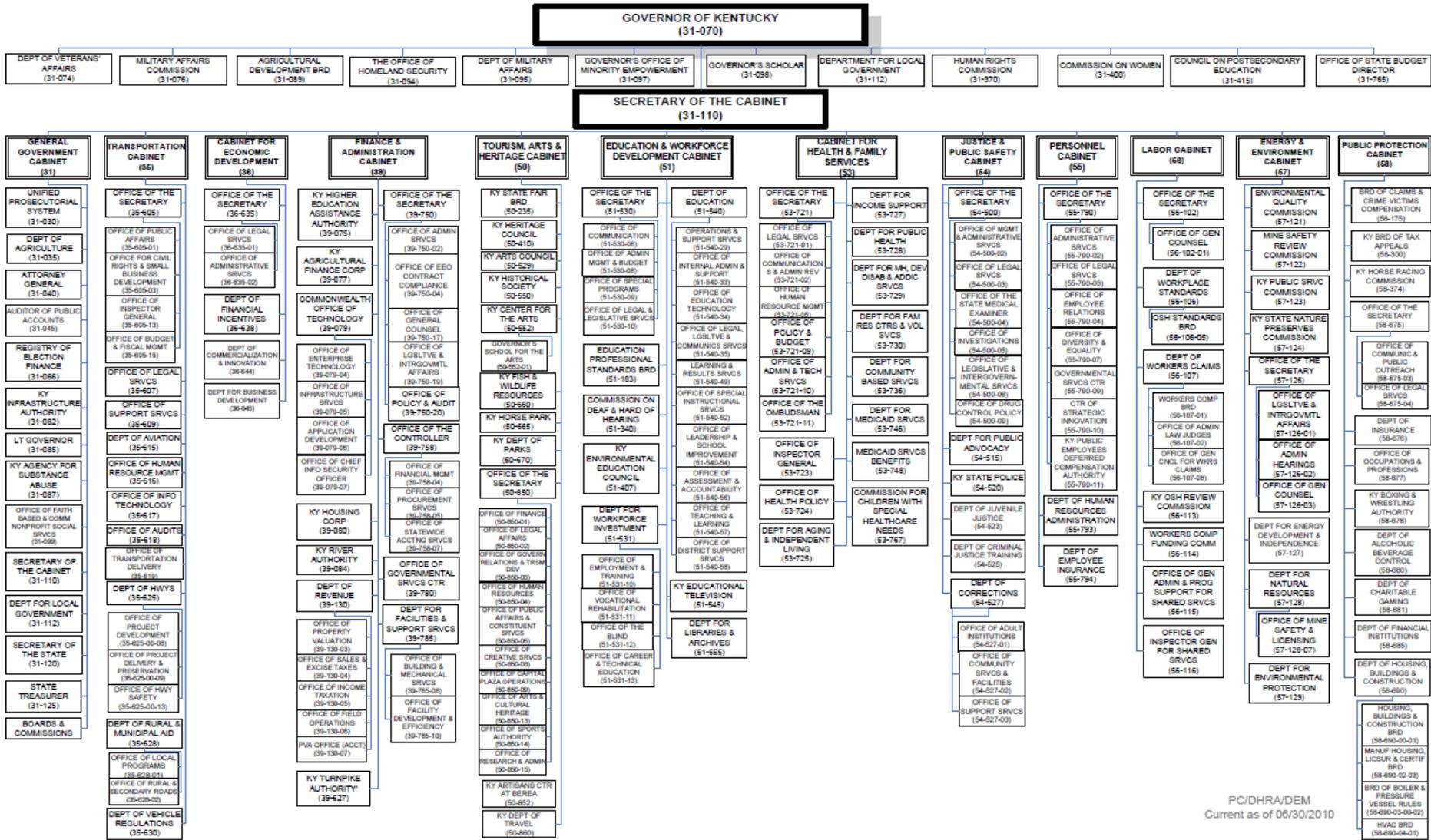
The following key terms will be discussed in this lesson:

- Organizational Management
- Enterprise Structure
- Company Code
- Personnel Area
- Personnel Subarea
- Cost Center
- Personnel Structure
- Employee Groups
- Employee Subgroups
- Payroll Areas
- Organizational Plan
- Relationships
- Inheritance
- Organizational Units
- Jobs
- Positions
- Persons
- Qualifications



Each entry made in KHRIS affects one or more components of an employee's time and pay.

What is Organizational Management?



Uses for Organizational Management

Organizational management (OM) is the component of KHRIS that maintains the organizational structure in the system.

- It provides a clear picture of the organization at any point in time
 - Past
 - Present
 - Future
- It provides access to the reporting structure in real time
- Relationships stored in KHRIS:
 - Allow structural authorization, or what organizations we can view
 - Create hierarchy
 - Link jobs to positions
 - Link positions to employees
 - Link positions to positions
 - Link positions to organizational units
 - Link positions to cost centers
 - Link objects to qualifications

KHRIS contains three distinct areas of information:

- Organizational structure
- Enterprise structure
- Personnel structure

These pieces of information create the link between OM and Personnel Administration, as well as other functional areas of KHRIS.



Enterprise Structure

The **enterprise structure** defines the legal structure of the state.

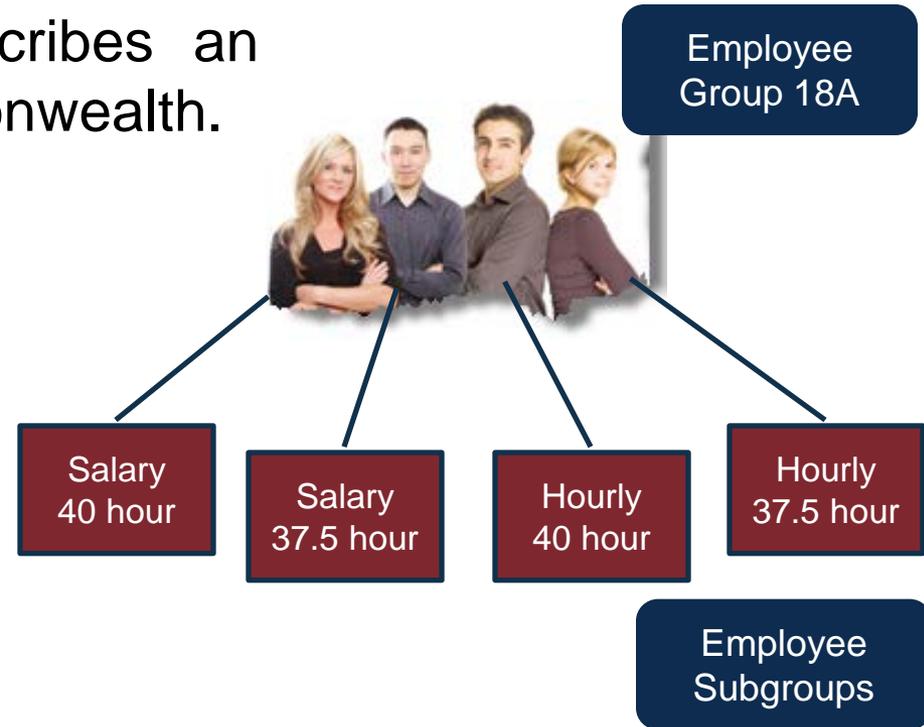
- **Company code** – COMK for the Commonwealth; creates a link between the information in human resources and accounting
- **Personnel area** – tied directly to the company code and is used in Payroll to identify the branch of government for whom the employee works
- **Personnel subarea** – assigned at the position and defines the payroll rules for the employee
- **Cost center** – ties the HR structure to the finance structure

Enterprise structure					
CoCode	COMK	Commonwealth of Kentuc...			
Pers.area	0001	Executive	Subarea	1001	FT N-Exempt
Cost Ctr	3109500000	Military Affairs	Bus. Area	1000	Commonwealth of Kentu...
Func. Area					

Personnel Structure

The **personnel structure** describes an employee's position in the Commonwealth.

- **Employee groups** – place like employees into categories
- **Employee subgroups** – subdivide employee groups according to employees' status
- **Payroll area** – describes the employees' pay frequency and payroll cycle



Personnel structure			
EE group	A	18A	Payr.area SM Semi-monthly
EE subgroup	02	ASC Salary 37.5	Contract

Organizational Structure

The **organizational plan** defines the hierarchical relationship between OM objects, including org units, positions and jobs.

Organizational plan		Administrator	
Percentage	<input type="text" value="100.00"/>	Time	<input type="text"/>
Position	<input type="text" value="30031917"/>		
		62110V000101	
		ALCOHOL & DRUG REI	
Job key	<input type="text" value="20001077"/>	62110V000101	
		Alcohol & Drug Rehabili	
Exempt	<input type="text" value="E"/>		
Org. Unit	<input type="text" value="10003748"/>	53729	
		Support Services Unit	
Org.key	<input type="text" value="00015372900000"/>		

Organizational Information

Display 0001 Organizational Assignment

Org Structure

Personnel No: 155307 Name: Carol McFarland

EE group: A 18A Personnel area: 0001 Executive Status: Active

EE subgroup: 02 ASC Salary 37.5 Pers. subarea: 1001 FT N-Exempt

Start: 05/02/2010 to 12/31/9999 Chng: 08/02/2010 CONVADM

Enterprise structure

CoCode: COMK Commonwealth of Kentucky

Pers. area: 0001 Executive Subarea: 1001 FT N-Exempt

Cost Ctr: 5372900000 Dept for Mh, Dev Dis Bus. Area: 1000 Commonwealth of Kentucky

Func. Area:

Personnel structure

EE group: A 18A Payr. area: SM Semi-monthly

EE subgroup: 02 ASC Salary 37.5 Contract:

Organizational plan

Percentage: 100.00

Position: 30031917 62110V000101 ALCOHOL & DRUG REI

Job key: 20001077 62110V000101 Alcohol & Drug Rehabil

Exempt: E

Org. Unit: 10003748 53729 Support Services Unit

Org. key: 00015372900000

Administrator

Time:

Enterprise structure

Personnel structure

Organizational structure

Relationships

Org management uses *relationships* to identify positions, persons, org units, jobs, cost centers, and qualifications.

- OM is based on the concept that each element in an organization represents a stand-alone object with individual characteristics
- These objects are created and maintained separately, then linked together through relationships
- Relationships are displayed in IT 1001
- Agencies are responsible for maintaining the following relationships stored on a position:

- A002 – Reports to
- B002 – Is Line Supervisor of
- A012 – Manages
 - (Upon establishment of the position or a request to the OM Branch)
- BZ01 – Time Approver

The screenshot displays a web-based interface for managing relationships. At the top, it shows the title 'Relationships - IT 1001' and a breadcrumb trail '01 O 10001277 1'. Below this, there is a field for 'Relationship type/relationship' with a dropdown menu set to 'A', a text input field containing '031', and the label 'Requires'. A section titled 'Related Object' contains several fields: 'Type of related object' with a dropdown menu set to 'Q Qualification', 'ID of related object' with a text input field containing '50000947', 'Abbreviation' with a text input field containing 'unit', and 'Name' with a text input field containing 'Unit'. At the bottom of the form, there is a 'Priority' field with a dropdown menu. In the bottom right corner, it indicates 'Record 2 of 20'.

OM has six key objects:

- **S-** Position (30 million)
- **P-** Holder (Pernr, Employee ID, SSN)
- **O-** Organizational Unit (10 million)
- **C-** Job (20 million)
- **K-** Cost Center
- **Q-** Qualifications (50 million)

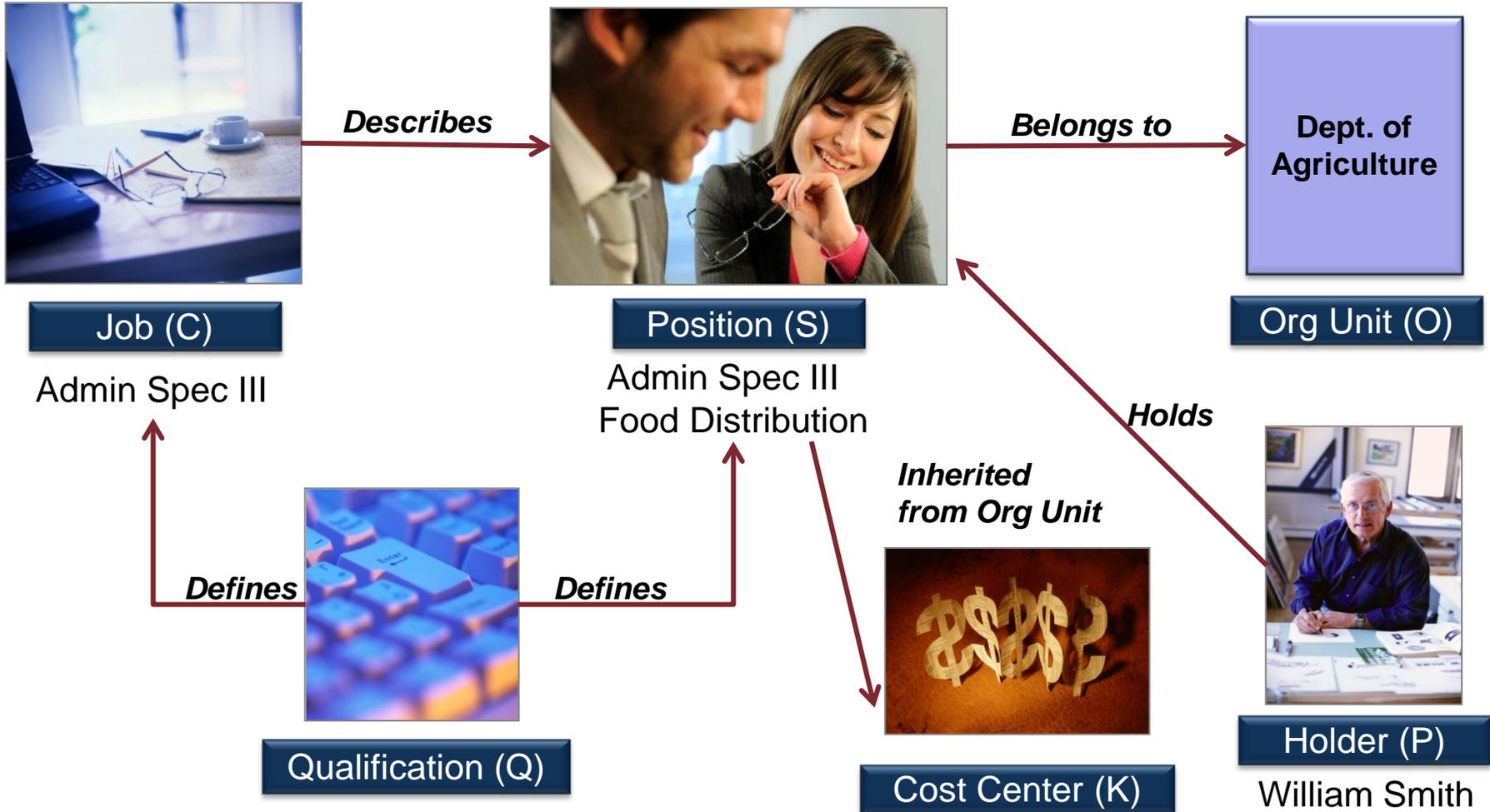


Inheritance occurs when one object receives attributes and characteristics of another object with which it has a relationship.

Examples:

- An org unit inherits attributes of a higher-level org unit to which it belongs
- A position inherits attributes of the job that describes it
- A person inherits attributes of the position he holds

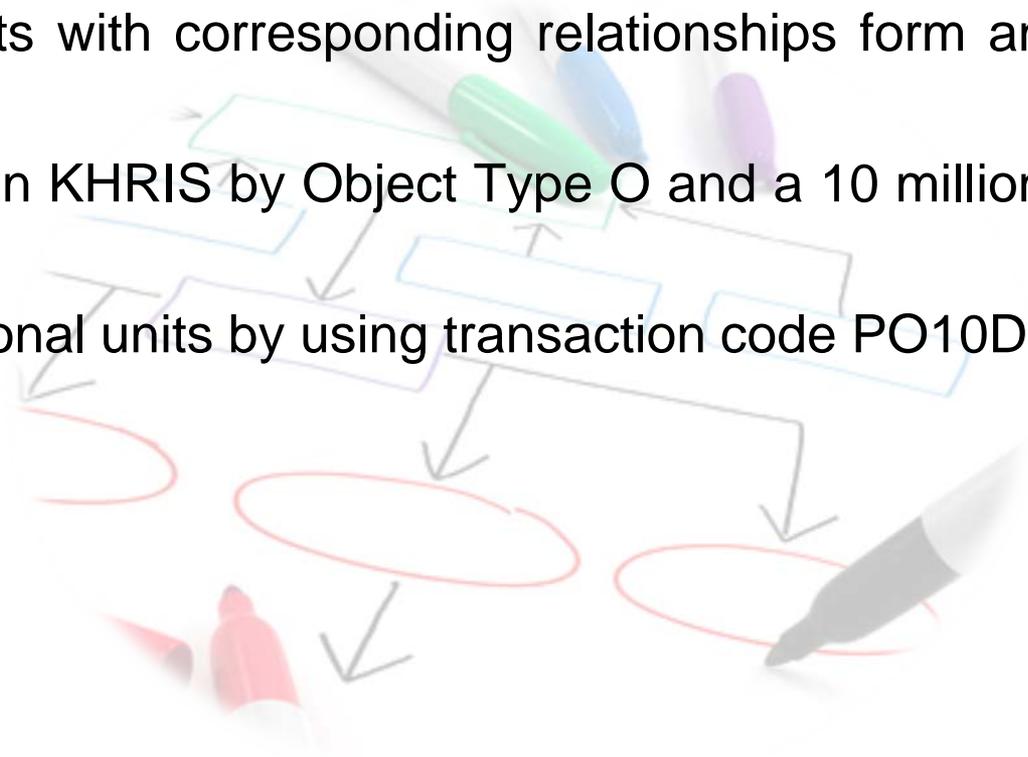
Summary of Relationships



Organizational Units

An **organizational unit** describes a distinct business unit.

- The organizational structure is the basis for the creation of an organizational plan
- Multiple organizational units with corresponding relationships form an organizational structure
- Org units are represented in KHRIS by Object Type O and a 10 million number (i.e. 10000530)
- You can access organizational units by using transaction code PO10D



A **job** is the foundation from which positions are created. Establishment or revision of jobs is handled by memo to the Personnel Cabinet.

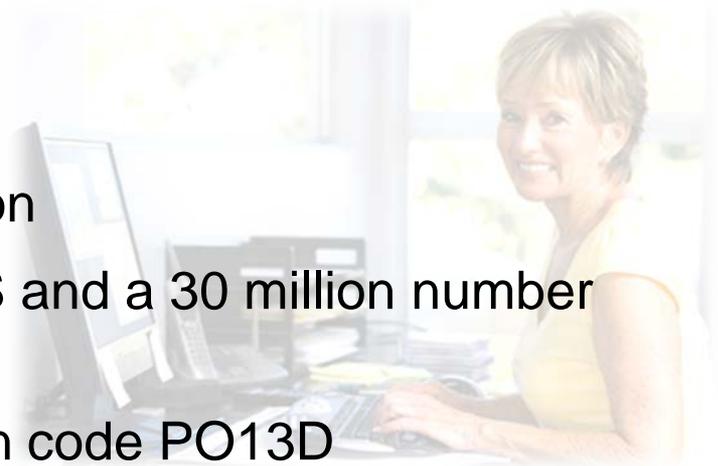
Jobs:

- Describe the general classification of functions and duties that are identical across the Commonwealth
- Are used as the basis for creating positions
- Are not occupied by Holders (employees)
- Are represented in KHRIS by Object Type C and a 20 million number (i.e. 20000527)
- We can access jobs by using transaction code PO03D

A ***position*** is a detailed representation of a job and is held by an individual. A number of positions can be based on the same job.

A position:

- Belongs to an org unit
- Reports to another position
- May be vacant or filled
- Represents a set of tasks performed by a person
- As a rule, represents one employee
- May be classified as a chief position
- Can be a line supervisor of another position
- Is represented in KHRIS by Object Type S and a 30 million number (i.e. 30003424)
- We can access positions using transaction code PO13D



The Holder represents an employee and is the central object in the Personnel Administration module. A Holder refers to the physical person who fills a given position.

A Holder:

- Is assigned to a position
- Inherits the attributes of all related OM objects
- Is represented in KHRIS by Object Type P and a six digit personnel number (PERNR)
- We can access employees through Personnel Administration transaction PA20.



Qualifications store attributes that can be attached to a job or org.

Qualifications:

- Are maintained by the Personnel Cabinet
- Are represented in KHRIS by Object Type Q and a 50 million number (i.e. 50000265)
- Stored against a position, org, or job.

Qualification ID	Description	Code
QK 50000253	Governor's Authority	GovAuth
QK 50000259	Job Qualification Group	JobQual
QK 50000260	Administrative-Administrative Support	Adms
QK 50000250	Certifications	Cert
QK 50000261	Education	Education
QK 50000269	Emergency Preparedness	Emergency
QK 50000266	Financial	Financial
QK 50000262	Fiscal -Accounting	Fiscal-Acc
QK 50000257	Group-Zero Job Code	ZeroJobCode
QK 50000263	Human Services	Human
QK 50000265	Information Technology	InfoTech
QK 50000264	Inspection-Regulatory	InspReg
QK 50000267	Law	Law
QK 50000252	Licenses	Lic
QK 50000268	Logistical Resources	LogRes
QK 50000270	Medical-Health Science	Medical
QK 50000271	Natural Resources	Natural
QK 50000272	Non-Classified	NonClass
QK 50000273	Skilled Trades	Skill1Trades
QK 50000255	Job Specification Group	JobSpec
QK 50000254	Organizational Unit Indicator	OrgUnitId
QK 50000258	Training and Events-Group	Training

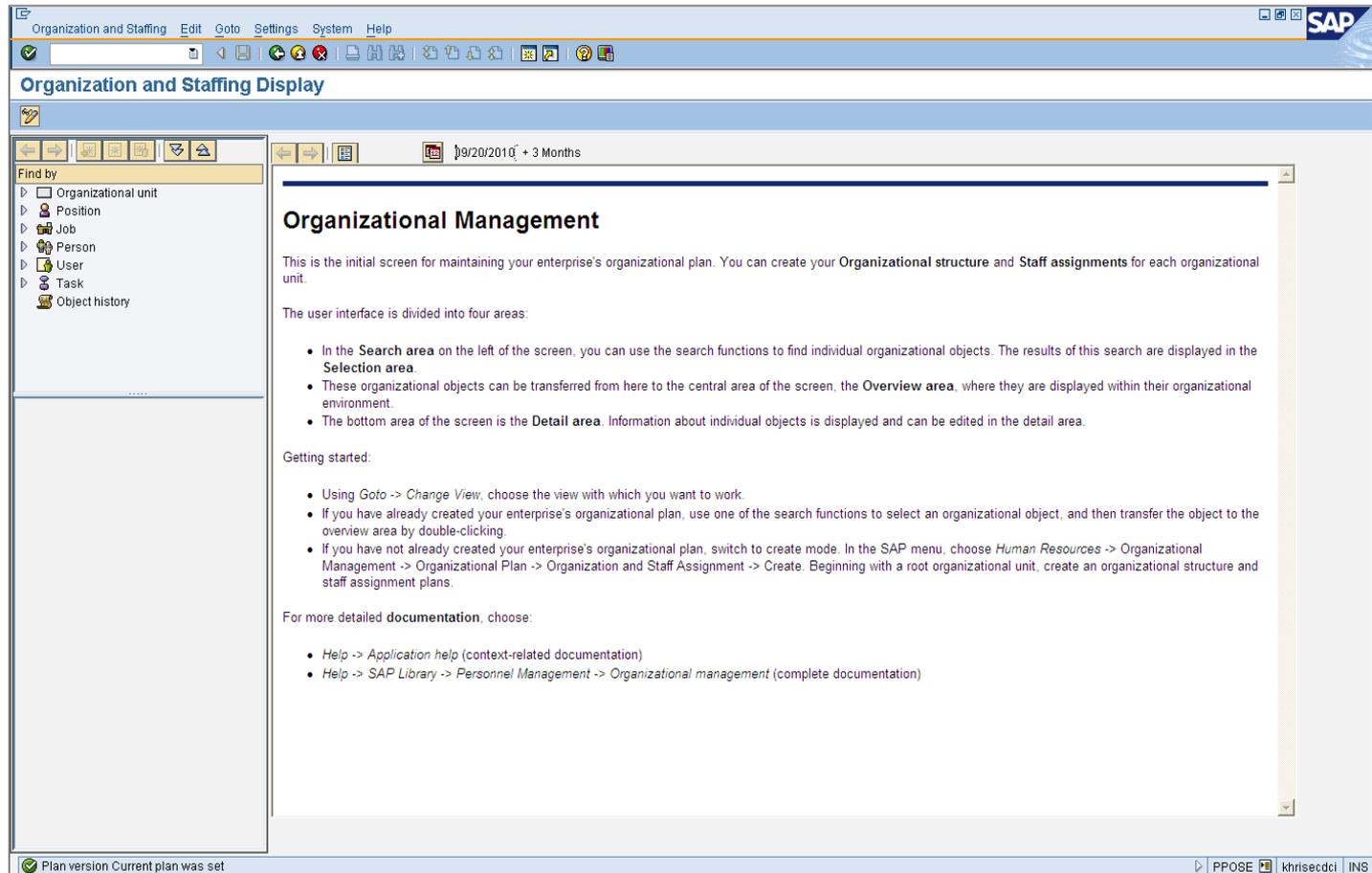
Display the Org Structure

Transaction PPOSE, Organization and Staffing Display, is used to review org units and positions in the organization.

- KHRIS is date driven, therefore, PPOSE can be used to view the existing, previous, or future, organizational structure
- Within PPOSE, you can display:
 - Org units
 - Positions
 - Chiefs
 - Holders of positions
- This transaction is built upon relationships established in org management

PPOSE Welcome Screen

A welcome message displays the first time we access PPOSE.



PPOSE Graphical View

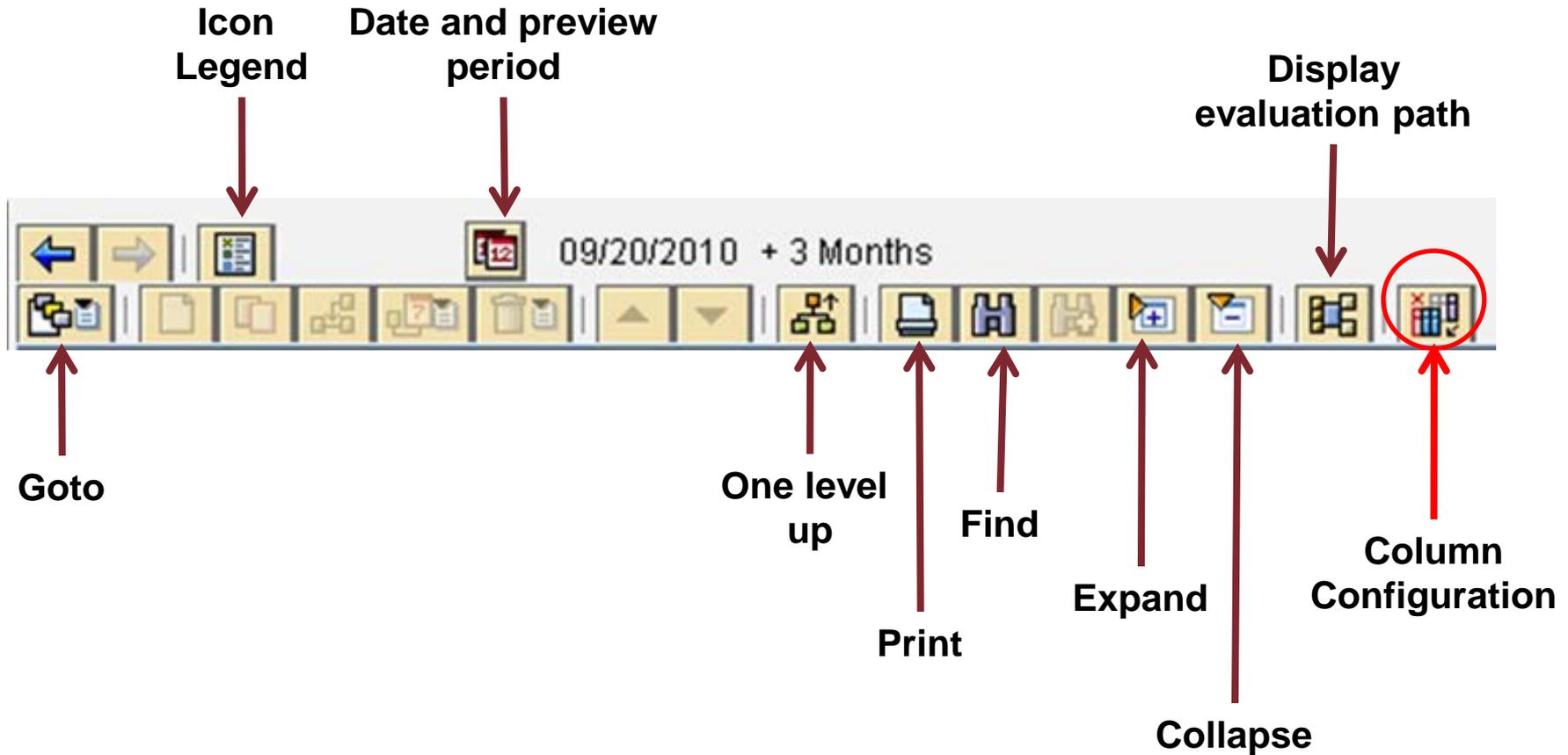
The screenshot displays the SAP PPOSE Graphical View interface, divided into several key sections:

- 1 Search:** A search panel on the left with options like 'Free search', 'Search Term', 'Structure Search', and 'Object History'. A blue oval labeled '1 Search' is overlaid on this panel.
- 2 Selection:** A tree view of organizational units. The 'Pers Cabinet - Office of the Secretary' is selected and highlighted in yellow. A blue oval labeled '2 Selection' is overlaid on this selection.
- 3 Display:** A list of jobs within the selected organizational unit, including 'CABINET SECRETARY', 'EXECUTIVE SECRETARY III', 'SPECIAL ASSISTANT', 'EXECUTIVE SECRETARY II', 'SPECIAL ASSISTANT', 'PAYROLL ONLY', 'Office of Administrative Services', 'Office of Legal Services', 'Office of Employee Relations', 'Office of Diversity and Equality', 'Office of Inspector General', 'Governmental Services Center', and 'Center of Strategic Innovation'. A blue oval labeled '3 Display' is overlaid on this list.
- 4 Details:** A detailed view of the selected organizational unit, showing 'Basic data', 'Account assignment', 'Cost distribution', 'Address', 'Work schedule', 'Quota Planning', and 'Max Bu...'. A table lists staff assignments with columns for 'Holder', 'Percentage', and 'Assigned as...'. A blue oval labeled '4 Details' is overlaid on this section.

Additional callouts include 'Name of the Org Unit' pointing to the selected unit in the tree, and 'Jobs within the org unit' pointing to the list of jobs.

Holder	Percentage	Assigned as...
Luz Ennis	100.00	05/02/2010 U
Bette Davidson	100.00	05/02/2010 U
Jesse Willingham	100.00	05/02/2010 U
Lucille Aguilar	100.00	05/02/2010 U
Lonnie McCain	100.00	05/02/2010 U

Customize the PPOSE View



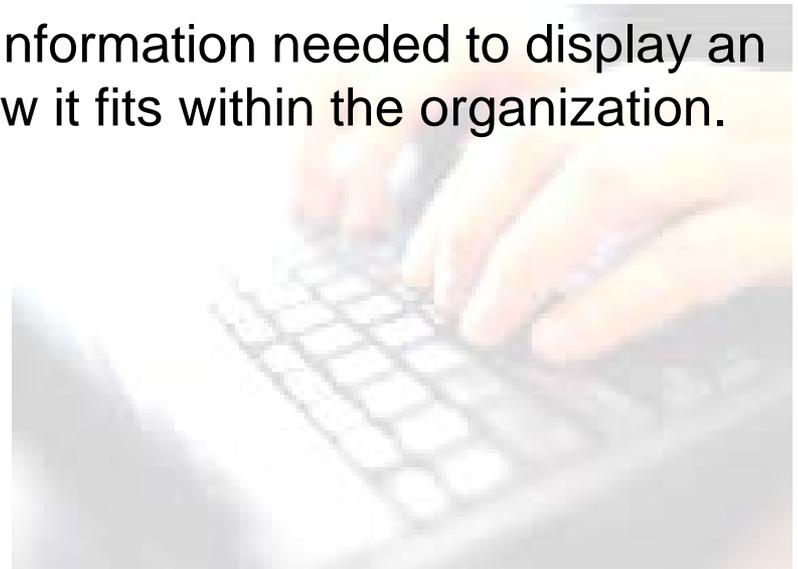
Exercise 1.1: Display Organizational Structure

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Transaction Code: PPOSE

Purpose:

This exercise will provide you with the information needed to display an organizational unit, the staffing, and how it fits within the organization.



1. A Person _____ a Position

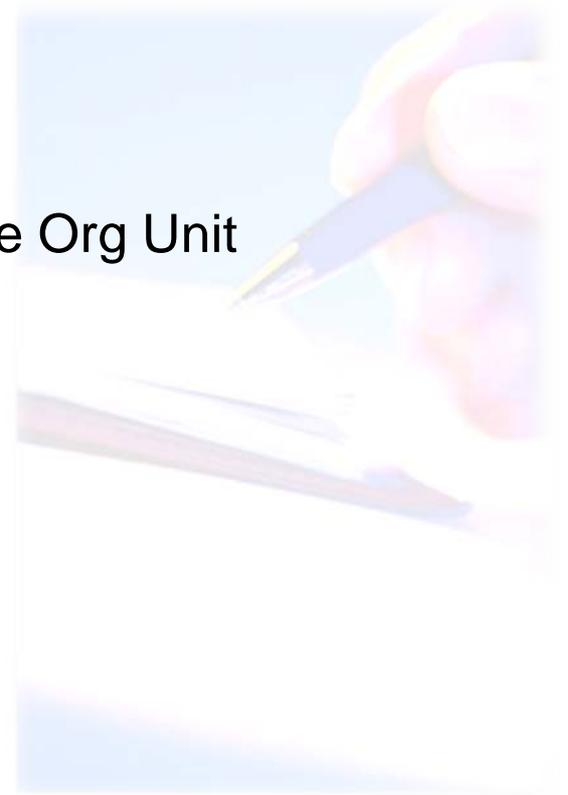
2. A Job _____ a Position

3. A Position _____ an Org Unit

4. A Position _____ the Cost Center from the Org Unit

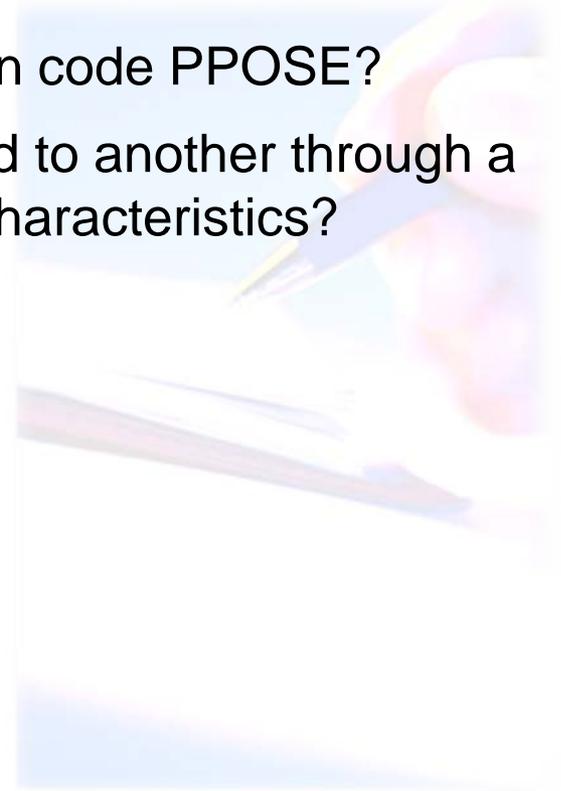
5. A Qualification _____ the Job

- A. Holds
- B. Belongs to
- C. Inherits
- D. Describes
- E. Defines



Knowledge Check

1. What is the company code for the Commonwealth?
2. What are the three structures in OM?
3. What are the key objects in OM?
4. What items can you display using transaction code PPOSE?
5. What occurs in OM when one object is linked to another through a relationship and receives its attributes and characteristics?



In this lesson you learned to:

- Explain and access KHRIS transactions
- Define org management
- Define key org management terms
- Explain the importance of relationships
- Discuss the relevance of inheritance with org management
- Display org structures





Organizational Units

Lesson 2

Lesson 1: OM Overview

Lesson 2: Organizational Units

Lesson 3: Jobs

Lesson 4: Positions

Lesson 5: Reporting

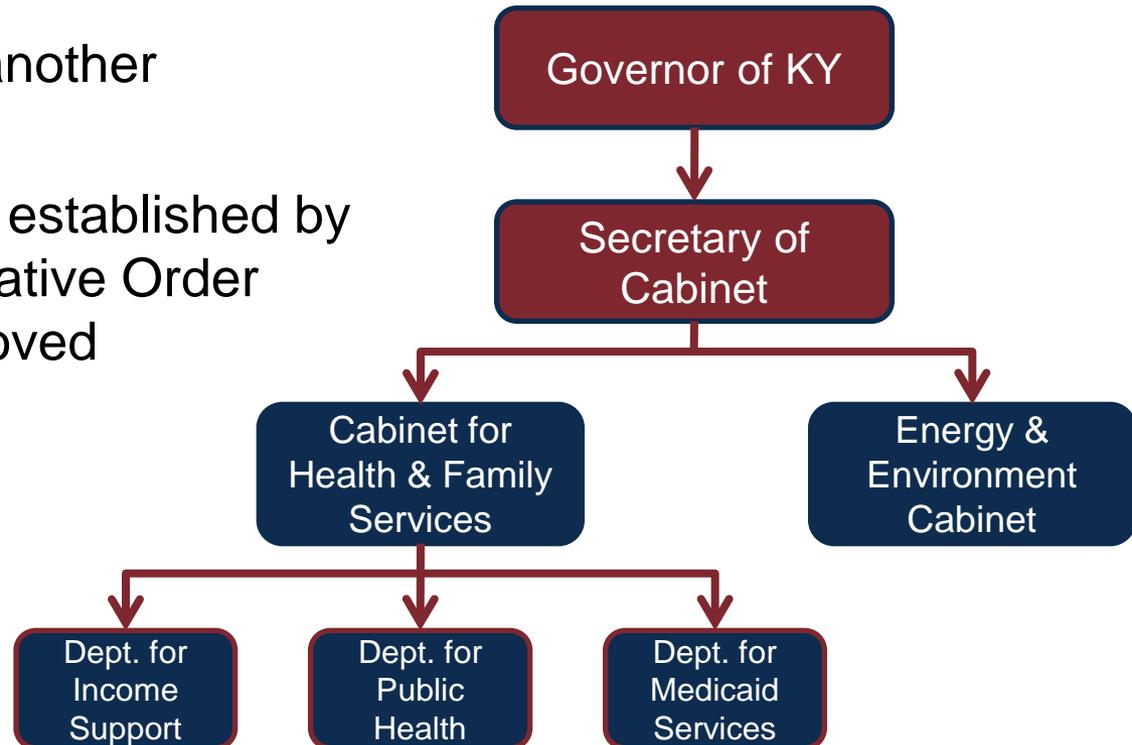
Wrap-up

By the end of this lesson participants will be able to:

- Display an org unit
- Identify infotypes used in an org unit

Organizational units are used to depict the basic structure of the organization.

- They are functional units of the state
- An org unit *reports to* another org unit
- New org units must be established by Executive or Administrative Order resulting from an approved reorganization



Org unit infotypes can be displayed using transaction code PO10D.

Infotypes that can be stored against an org unit are:

- IT 1000 Object
- IT 1001 Relationships
- IT 1002 Description
- IT 1008 Acct Assignment
- IT 1028 Address
- IT 9104 Hierarchy

Infotype Name	E	
Object - IT 1000	<input checked="" type="checkbox"/>	▲
Relationships - IT 1001	<input checked="" type="checkbox"/>	▼
Description - IT 1002	<input type="checkbox"/>	
Acct. Assignment - IT 1008	<input type="checkbox"/>	
Address - IT 1028	<input type="checkbox"/>	
KY Hierarchy - IT 9104	<input checked="" type="checkbox"/>	▲

Time period

Period

From 12/08/2010 to 12/31/9999

Today Current week

All Current month

From curr.date Last week

To current date Last month

Current Year

Select.

Exercise 2.1 : Display Org Units

Follow along as your instructor leads you through the steps:

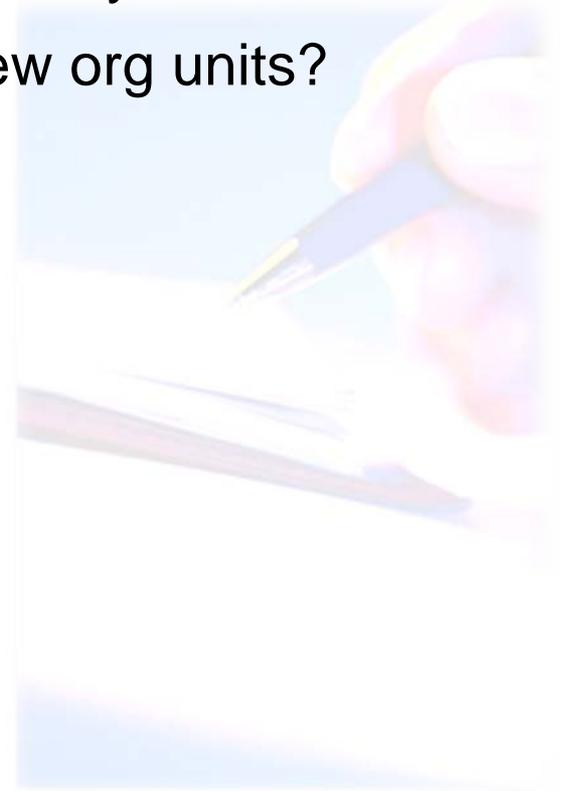
Transaction: PO10D

Purpose:

Allows the user to view all information about the organization.

Knowledge Check

1. True or False? Org units can be created as needed by an Agency.
2. What infotypes are stored at agency level only?
3. What are the two transactions used to view org units?



In this lesson you learned to:

- Display an org unit
- Identify infotypes used in an org unit





Jobs

Lesson 3

Lesson 1: OM Overview

Lesson 2: Organizational Units

Lesson 3: Jobs

Lesson 4: Positions

Lesson 5: Reporting

Wrap up

By the end of this lesson participants will be able to:

- Display a job
- Identify infotypes used in a job
- Print a Job Specification

Jobs are the general classification of functions and duties that are identical across the Commonwealth (Administrative Specialist, for example).

Job infotypes that can be displayed using transaction code PO03D.

Infotypes stored against a job are:

- IT 1000 Object
- IT 1001 Relationships
- IT 1005 Planned Comp
- IT 1610 US Job Attributes
- IT 9103 KY Job Spec
- IT 9105 Special Entrance Rate

Display Job

Plan version: 01 Current plan

Job: 20000870 Racing License Administrator

Abbr.: 38240V000101

Active | Planned | Submitted | Approved | Rejected

Infotype Name	E
Object-IT 1000	✓
Relationships - IT 1001	✓
Planned Comp - IT 1005	✓
US Job Attributes-IT 1610	✓
KY Job Spec - IT 9103	✓
Special Ent. Rate-IT 9105	✓

Time period

Period

From: 11/22/2010 to: 12/31/9999

Today Current week

All Current month

From curr.date Last week

To current date Last month

Current Year

Select.

Exercise 3:1 : Display Job Infotypes

Follow along as your instructor leads you through the steps:

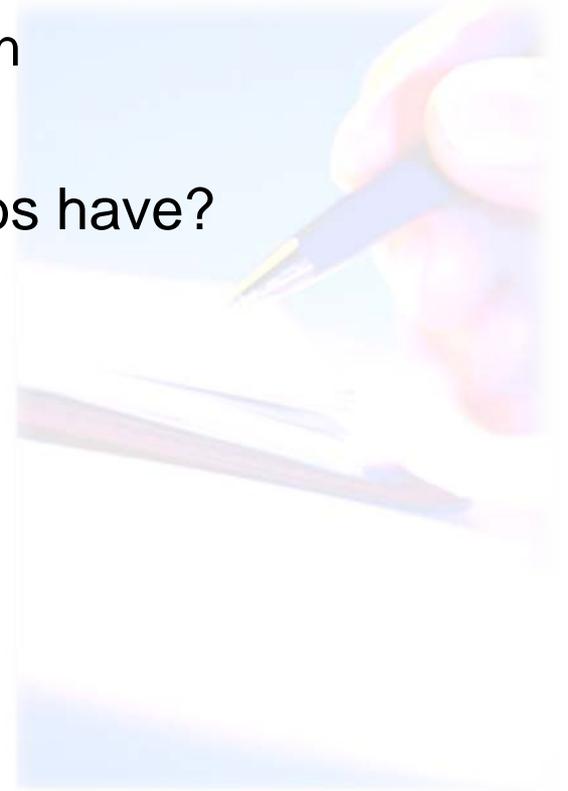
Transaction: PO03D

Purpose:

Allows the user to view information stored on the infotypes associated with a job.

Knowledge Check

1. Which infotype contains the abbreviation for the job?
2. A relationship does which of the following?
 - a. Defines the validity period
 - b. Automatically creates a link to the position
 - c. Describes the main area of responsibility
3. How many IT1005 records will all 18A jobs have?



In this lesson you learned to:

- Display a job
- Identify infotypes used in a job
- Print a Job Specification





Positions

Lesson 4

Lesson 1: OM Overview

Lesson 2: Organizational Units

Lesson 3: Jobs

Lesson 4: Positions

Lesson 5: Reporting

Wrap-up

By the end of this lesson participants will be able to:

- Explain the concept of positions
- Display position infotypes
- Print a position description
- View forms used to initiate OM actions
- Describe the process to:
 - Establish a position
 - Reclassify a position
 - Maintain a position
 - Delimit a position

Positions are directly related to, and inherit their tasks and characteristics from, a job.

- Positions may be filled or vacant
- A position must always be related to:
 - Another position through the relationship “reports to”
 - An organizational unit through the relationship “belongs to”
 - A job through the relationship “is described by”
- Other relationships include:
 - A002 Reports to
 - A011 Cost Center (**Establish position form**)
 - A012 Manages (Chief) (**Establish position or email to the OM branch**)
 - B002 Line Supervisor

Positions (Continued)

There can only be one position per Org unit designated as chief, although there can be multiple line supervisors. The chief relationship must be identified when establishing the position and/or through a user access form.

Agencies are responsible for maintaining the following relationships:

- A002 Reports To
- A012 Manages (email to OM branch)
- B002 Line Supervisor

Position	21620V000101	SECURITY FORCE MANAGER	
Planning Status	Active		
Valid from	01/01/1900	to 12/31/9999	Change Information
Relationships - IT 1001			
Relationship type/relationship	A	011	Cost center assignment

Position	21620V000101	SECURITY FORCE MANAGER	
Planning Status	Active		
Valid from	08/26/2010	to 12/31/9999	Change Information
Relationships - IT 1001			
Relationship type/relationship	B	002	Is line supervisor of

It is critical to ensure supervisory relationships are correct, because they authorize who and what a supervisor can see in MSS.

Display Position Infotypes

Position infotypes can be displayed using transaction code PO13D.

Infotypes that can be stored against a position are:

- IT 1000 Object
- IT 1001 Relationship
- IT 1002 Description
- IT 1005 Planned Comp
- IT 1007 Vacancy
- IT 1008 Account Assignment
- IT 1013 Emp Group/SubGrp
- IT 1018 Cost Distribution
- IT 9101 Additional Position Info
- IT 9102 KY Position Des

The screenshot shows the SAP 'Display Position' (PO13D) interface. At the top, the title is 'Display Position'. Below it, there are icons for help, refresh, and user. The 'Plan version' is set to '01 Current plan', 'Position' is '20000312', and 'Abbr.' is empty. There are tabs for 'Active', 'Planned', 'Submitted', 'Approved', and 'Rejected'. The 'Active' tab is selected. Below the tabs is a list of infotypes with columns for 'Infotype Name' and 'E'. The list includes: Object - IT 1000, Relationships - IT 1001, Description - IT 1002, Planned Comp - IT 1005, Vacancy - IT 1007, Acct. Assignment - IT 1008, Emp Grp/SubGrp - IT 1013, Cost Distribution - IT 1018, Adl Position Info - IT 9101, and KY Position Des - IT 9102. A red circle highlights this list. To the right of the list is the 'Time period' section, which has a radio button for 'Period' selected. The 'From' date is '01/01/2001' and the 'to' date is '12/31/9999'. There are also radio buttons for 'Today', 'All', 'From curr.date', 'To current date', 'Current week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Select.' button is at the bottom right of the time period section.

Before processing an Appointment an Agency should use transaction PO13D to ensure the position is set up correctly. This will eliminate PA/Payroll errors.

Exercise 4.1: Display Position Infotypes

Follow along as your instructor leads you through the steps:

Transaction: PO13D

Purpose:

Allows the user to view all information about a specific position.

Position Actions

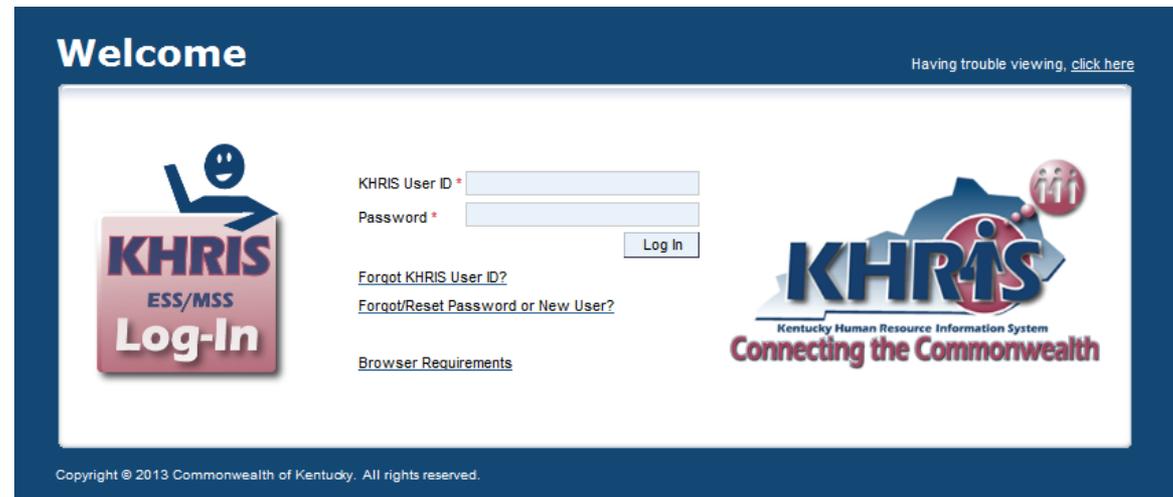
- Establish Position, Reclassify Position, Update Position Description, or Work County Change
 - Agencies initiate form and submit through agency workflow
 - Personnel Cabinet approves through its workflow
- Delimit (Abolish) Position
 - Agencies use transaction code ZOME012 to delimit the position in real time.
- Reallocation
 - For under 25 employees, the Agency initiates the form(s) through agency workflow and the Personnel Cabinet approves through its workflow
 - For over 25 employees, the Personnel Cabinet will communicate with the Agency to make the necessary changes.

Agencies use **Human Capital Management Processes and Forms** (HCMPF) to initiate the processes to create or maintain positions. The following forms will be discussed in this lesson:

- Establish Position
- Establish Position with Position Description
- Reclassification No Position Description Required
- Reclassification with Position Description
- Reallocation No Position Description Required
- Reallocation with Position Description
- Work County Change
- Update Position Description

The HCMPF forms are accessed through the KHRIS Self-Service Center.

- Web-based portal (khris.ky.gov)
- Access based on security role
- Our user ID is our alphanumeric employee ID (ABC1234)
- For security reasons, the portal will time out after 15 minutes of inactivity



The screenshot shows the KHRIS Self-Service Center login page. At the top left, it says "Welcome". At the top right, there is a link: "Having trouble viewing, [click here](#)". On the left side, there is a logo for "KHRIS ESS/MSS Log-In" featuring a stylized person icon. In the center, there are two input fields: "KHRIS User ID *" and "Password *", with a "Log In" button to the right. Below the password field, there are links for "Forgot KHRIS User ID?", "Forgot/Reset Password or New User?", and "Browser Requirements". On the right side, there is a large "KHRIS" logo with a gear and a person icon, and the text "Kentucky Human Resource Information System" and "Connecting the Commonwealth". At the bottom, there is a copyright notice: "Copyright © 2013 Commonwealth of Kentucky. All rights reserved."

User Security Agreement

Employees will be required to read and sign a User Security Agreement annually so that an updated form is on record.

User Security Agreement

ENTER YOUR FULL NAME: *

I AGREE Reject

User Security Agreement for Access to Confidential Data Maintained by the Personnel Cabinet

I understand security measures have been established to provide access to the Kentucky Human Resource Information System (KHRIS). I understand these security measures may also provide inquiry and/or update capabilities to all systems maintained by the Personnel Cabinet, to include, but not limited to, KHRIS, KHRIS' Employee Self Service (ESS) and/or KHRIS' Manager Self Service (MSS), the Career Opportunities System (COS), Image Connect, and/or CICS.

I acknowledge and agree to the following:

- I understand in order to obtain access to Personnel Cabinet systems, I have been given a User ID and password. I am solely responsible for all information obtained through this computer system access using only my ID and password. I am obligated to keep all Access Codes, including my User ID, password, security questions, etc., confidential to prevent unauthorized access to my accounts and to prevent unauthorized use of these systems.
- I will not allow any person to use my ID and password to logon to any network or system of the Personnel Cabinet. I am responsible for any use or abuse of KHRIS information and any other system information with these accounts, since no other person will have authorized access through my account.
- I further understand that the Personnel Cabinet may cancel my access at any time without notice if security has been or may be compromised.
- I understand that KHRIS and any other Personnel Cabinet system data (processed or stored under local directories) shall not be used for any purpose other than official Commonwealth agency business. I shall not disclose in any manner to any entity or individual who does not have a legitimate need to know without the prior, written consent of the Secretary of the Personnel Cabinet.
- I understand that some information that I access as an Authorized Agency User may be considered not only confidential but also Protected Health Information (PHI) subject to the Health Insurance Portability and Accountability Act (HIPAA) of 1996. Additionally, I understand some levels of access to KHRIS require Personnel Cabinet sponsored HIPAA training before access is granted. This training shall be renewed periodically.
- Any User that improperly discloses, intentionally misuses or inappropriately transfers any confidential information, may be subject to disciplinary action up to and including dismissal, pursuant to KRS 18A, 101 KAR 1:345, 101 KAR 3:050, or other applicable state and federal law. Any User who violates the terms of this Agreement may also be exposed to additional civil and/or criminal charges.

I understand I shall notify my Agency Security Contact of any actual or suspected data security breach as soon as possible. The Agency Security Contact is responsible for immediately notifying the Personnel Cabinet. I further understand and agree nothing contained in this Agreement shall be construed as granting any property rights, by license or otherwise, to any confidential information.

By clicking "I AGREE" below, I acknowledge it is my responsibility to comply with the terms of this Agreement, which I have read and accepted these conditions as stated herein and within KHRIS documentation. I further acknowledge this action serves as my signature indicating I agree to maintain the confidentiality of all information obtained at all times, including if and when I am no longer an employee of the Commonwealth.

Accessing Forms in Self-Service Center

The tabs you see in the Self-Service Center will depend on your security access.

The screenshot shows the KHRIS Self-Service Center interface. At the top, there is a header with the Kentucky Personnel Cabinet logo and the text "Kentucky Personnel Cabinet Serving the People Who Serve the People". The user is logged in as "Welcome BPP0038," with links for "Help" and "Log Off". Below the header is a navigation bar with tabs: "Training Liaison Administrators", "Instructors", "Employee Self-Service" (highlighted), "My Benefits", "Manager Self-Service", "Insurance Coordinator NCP2", "Insurance Coordinator NCP1", and "HR Generalist".

Below the navigation bar is a "Welcome" message and a "Detailed Navigation" sidebar. The sidebar contains a "Welcome" link and a list of action areas: "Benefits Information", "Payment Information", "Personal Information", "Working Time", and "Who's Who".

The main display area contains a "Welcome to the KHRIS Employee Self-Service Center" message and a list of options available to the user:

- **Benefits Information:** View your current benefits selections, identify external organizations (such as charities) that you can then designate as your beneficiaries, complete annual enrollment during allowed periods.
- **Payment Information:** Review various salary/compensation statements, estimate your net pay using different withholdings and deductions, Change your W-4 tax withholdings.
- **Personal Information:** Maintain your address, family member and dependent information, emergency contacts and bank information.
- **Working Time:** Check your leave balances, request leave and overtime, review your time statement.

A footnote at the bottom states: "* Certain KHRIS services and/or information contained in the Employee Self-Service Center are only applicable to certain employees. Please check with your Human Resource Office for specific details."

Callouts in blue boxes point to specific features: "Role specific tabs" points to the navigation bar, "Links to action areas" points to the sidebar, and "Display area" points to the main content area.

Links to action areas

Role specific tabs

Display area

HR Generalist Tab

HR Generalist

Welcome to KHRIS Online Benefits Administration System

KHRIS Processes

KHRIS Processes

- Benefits/Employee Processes
 - Start Benefits/Employee Process
 - Start Hiring Processes
 - Search Benefits/Employee Processes
 - Open Benefits/Employee Processes
- Organizational Processes
 - Start Organizational Process
 - Search Organizational Processes
 - Open Organizational Processes

Worklist

Tasks Tracking

Show: My Open Tasks

Subject	From	Sent

The HR Generalist tab allows you to select the KHRIS Processes link.

Selecting Process to Complete

We will use the “Start Organizational Process” link to access and initiate the forms.

Start Processes

1 Select Object 2 Select Process 3 Fill Out Form 4 Check and Send 5 Completed

Object type: Organizational unit
Object ID: 10100123
Object abbreviation:
Object name:

Start

1 Hits Found

Description	Number
Division 2	10100123

Data From: 06/28/2011 09:19:39 [Refresh](#)

[Previous Step](#) [Select Process](#)

Start Processes

Object: Division 2

1 Select Object 2 **Select Process** 3 Fill Out Form 4 Check and Send 5 Completed

View [Standard View]

Process Name	Process Description
Establish Position	Select this process to establish a new position.
Establish Position with Position Description	Select this process to establish a new position with description.

Start Processes

1 Select Object 2 **Select Process** 3 Fill Out Form 4 Check and Send 5 Completed

Object type: Position
Object ID: 30000123
Object abbreviation:
Object name:

Start

1 Hits Found

Position	Position ID	Organizational Unit	Cost Center
Payroll Only	30000123	General Assembly	General Assembly

[Previous Step](#) [Select Process](#)

Start Processes

Object: Payroll Only

1 Select Object 2 **Select Process** 3 Fill Out Form 4 Check and Send 5 Completed

View [Standard View]

Process Name	Process Description
Reallocation	Select this process to perform a reallocation on a position.
Reallocation with Position Description Change	Select this process to perform a reallocation with position description change on a position.
Reclassification	Select this process to perform a reclassification on a position.
Reclassification with Position Description Change	Select this process to perform a reclassification with position description change on a position.
Update Position Description	Select this process to change the position description.
Work County Change	Select this process to perform a work county change.

Establish Position with Description Form

The infotypes updated using this form include:

- IT 1000 Object
- IT 1001 Relationships
- IT 1002 Description
- IT 1005 Planned Comp
- IT 1007 Vacancy
- IT 1008 Acct Assignment
- IT 1013 Emp Grp/SubGrp
- IT 1018 Cost Distribution
- IT 9101 Adl Position Info
- **IT 9102 KY Position Des**

Reference Number: _____



Personnel Cabinet

Establish Position

Position Description Required

Begin Date: _____	End Date: _____
-------------------	-----------------

If the Job number is known, please enter in the Job Number field below Proposed Values. Otherwise, enter a search term and select from the results. Wildcards can be used throughout the search term (i.e. "tom*ner" would return 'Attorney General').

Term: _____	Search	Results: _____
-------------	--------	----------------

Org Unit ID: _____	New Position:
Job Number: _____	Job Title: _____
Position Short Text: _____	Position Title: _____
Org Unit Short Text: _____	Org Unit Title: _____
<input type="checkbox"/> Is Chief of Org Unit?	

Personnel Area: _____	Personnel SubArea: _____		
Employee Group: _____	Employee SubGroup: _____		
Pay Grade Type: _____	Pay Grade Area: _____	Grade: _____	Level: _____
Salary Range: _____	Midpoint: _____	SER: N/A	

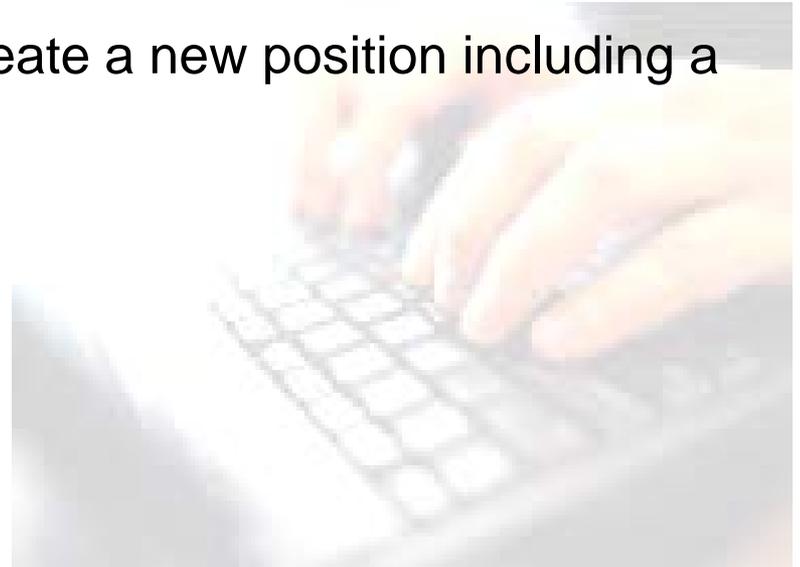
Unclassified <input type="checkbox"/>	Hours Limit for Position: _____		
Working Title: _____	<input type="radio"/> Included in CAP <input type="radio"/> Not Included in CAP		
Work County: _____	Function Group: _____		
Time Approver: _____			
Cost Center: _____			
Supervisor Pos No: _____			
<small>* Search for Cost Distributions by selecting from the List of Units above the form.</small>			
Order Number: _____			
Unit: _____	Location: _____	Activity: _____	WBS Element: _____
Functional Area: _____			
Remarks: _____			

Exercise 4.2: Establish Position with Description

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Purpose:

You will complete the form needed to create a new position including a description.



Reclassification Without Position Description Form

The infotypes updated using this form include:

Org Management:

- IT 1000 Object
- IT 1001 Relationship
- IT 1002 Description
- IT 1005 Planned Comp

Personnel Administration:

- IT 0000 Actions
- IT 0001 Org Assignment (Job Data)
- IT 0008 Basic Pay

Reference Number:



Personnel Cabinet Reclassification

No Position Description Required

Position: 30007755	Collision Repair & Refinish Techn I
Org Unit ID: 10000544	Org Unit Title: Information Management Section
Personnel Area: Executive	Employee Group: 18A
Personnel SubArea: FT Exempt	Employee SubGroup: ASC Salary 37.5
Personnel Number: 00172186	Employee Name: Silas Shaver

Begin Date: End Date: Dec 31, 9999

If the Job number is known, please enter in the "Job Number" field below. Proposed Values. Otherwise, enter a search term and select from the results. Wildcards can be used throughout the search term (i.e. "tom*ener" would return "Attorney General").

Term: Search Results:

Current Values Proposed Values

NOTE: When processing reclassifications requiring a change in the FLSA status of the position, the Human Resource Administrator **must** communicate with the Personnel Cabinet to ensure that the information is updated accordingly.

Reclassification with Position Description Form

The infotypes updated using this form include:

Org Management:

- IT 1000 Object
- IT 1001 Relationship
- IT 1002 Description
- IT 1005 Planned Comp
- **IT 9102 KY Position Des**

Personnel Administration:

- IT 0000 Actions
- IT 0001 Org Assignment (Job Data)
- IT 0008 Basic Pay

Reference Number:



Personnel Cabinet
Reclassification
Position Description Required

Position: 30007755 Collision Repair & Refinish Techn I	
Org Unit ID: 10000544	Org Unit Title: Information Management Section
Personnel Area: Executive	Employee Group: 18A
Personnel SubArea: FT Exempt	Employee SubGroup: ASC Salary 37.5
Personnel Number: 00172186	Employee Name: Silas Shaver

Begin Date: End Date: Dec 31, 9999

If the Job number is known, please enter in the 'Job Number' field below: Proposed Values. Otherwise, enter a search term and select from the results. Wildcards can be used throughout the search term (i.e. "tom*ener" would return "Attorney General").

Term: Search Results:

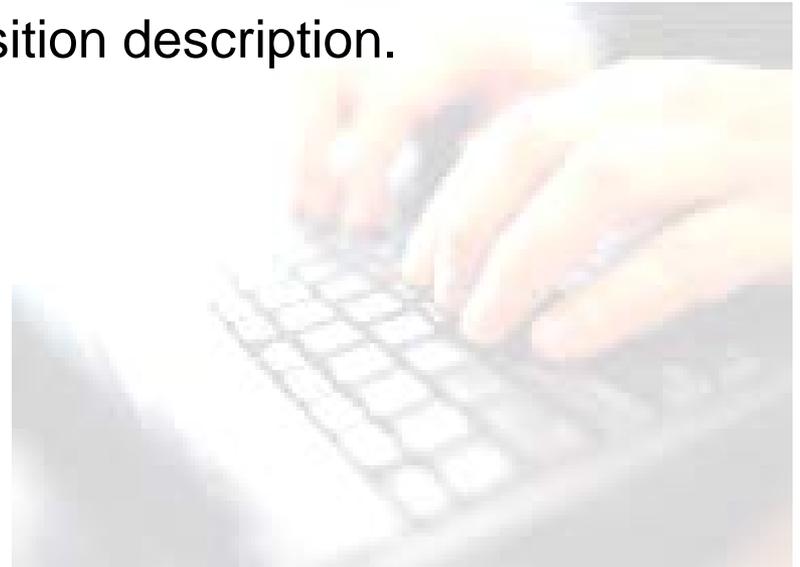
NOTE: When processing reclassifications requiring a change in the FLSA status of the position, the Human Resource Administrators **must** communicate with the Personnel Cabinet to ensure that the information is updated accordingly.

Exercise 4.3: Reclassification with Position Description Form

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Purpose:

You will reclassify a position with a position description.



Reallocation Without Position Description Form

The infotypes updated using this form include:

Org Management:

- IT 1000 Object
- IT 1001 Relationship
- IT 1005 Planned Comp

Personnel Administration:

- IT 0000 Actions
- IT 0001 Org Assignment (Job Data)
- IT 0008 Basic Pay

Reference Number:



Personnel Cabinet Reallocation

No Position Description Required

Position: 30007755 Collision Repair & Refinish Techn I
Org Unit ID: 10000544 Org Unit Title: Information Management Section
Personnel Area: Executive Employee Group: 18A
Personnel SubArea: FT Exempt Employee SubGroup: ASC Salary 37.5
Personnel Number: 00172186 Employee Name: Silas Shaver

Begin Date: End Date: Dec 31, 9999

If the Job number is known, please enter in the 'Job Number' field below Proposed Values. Otherwise, enter a search term and select from the results. Wildcards can be used throughout the search term (i.e. *tom*ener* would return Attorney General).

Term: Search Results:

Current Values	Proposed Values
Job Number:	Job Number: <input type="text"/>
Job Title:	Job Title:
Position Short Text: 17550V000101	<input type="text" value="Position Short Text: 17550V000101"/>
Position Title: Collision Repair & Refinish Techn I	<input type="text" value="Position Title: Collision Repair & Refinish Techn I"/>
Salary: 4675.14	<input type="text" value="Salary: 0.00"/>
Current Salary Range	Proposed Salary Range
Pay Grade:	Pay Grade:
Min - Max:	Min - Max:
Mid Point:	Mid Point:
SER: N/A	SER: N/A

Remarks:

Reallocation with Description Change Form

The infotypes updated using this form include:

Org Management:

- IT 1000 Object
- IT 1001 Relationship
- IT 1002 Description
- IT 1005 Planned Comp
- **IT 9102 KY Position Des**

Personnel Administration:

- IT 0000 Actions
- IT 0001 Org Assignment (Job Data)
- IT 0008 Basic Pay

Reference Number:



Personnel Cabinet Reallocation

Position Description Required

Position: 30007755 Collision Repair & Refinish Techn I
Org Unit ID: 10000544 Org Unit Title: Information Management Section
Personnel Area: Executive Employee Group: 18A
Personnel SubArea: FT Exempt Employee SubGroup: ASC Salary 37.5
Personnel Number: 00172186 Employee Name: Silas Shaver

Begin Date: End Date: Dec 31, 9999

If the Job number is known, please enter in the 'Job Number' field below Proposed Values. Otherwise, enter a search term and select from the results. Wildcards can be used throughout the search term (i.e. *tom*ener* would return 'Attorney General').

Term: Search Results:

Current Values	Proposed Values
Job Number:	Job Number: <input type="text"/>
Job Title:	Job Title:
Position Short Text: 17550V000101	Position Short Text: 17550V000101
Position Title: Collision Repair & Refinish Techn I	Position Title: Collision Repair & Refinish Techn I
Salary: 4675.14	Salary: 0.00
Current Salary Range	Proposed Salary Range
Pay Grade:	Pay Grade:
Min - Max:	Min - Max:
Mid Point:	Mid Point:
SER: N/A	SER: N/A

Remarks:

Work County Change Form

The infotypes updated using this form include:

Org Management:

- IT 9101 Adl Position Info

Personnel Administration:

- IT 0000 Actions
- IT 0208 Work Tax Area
 - Work Tax Area is based solely on the employees workstation

Reference Number: _____



Personnel Cabinet

Work County Change

First Name: Silas	Middle Name: Malcom	Personnel Number: 00172188
SSN: 853-74-8702	Pay Grade:	Work County: Franklin
Org Unit: 10000544	Information Management Section	
Position: 30007755	Collision Repair & Refinish Techn I	

Action Reason: <input type="text"/>	Effective Date: <input type="text" value="Oct 28, 2010"/>
-------------------------------------	---

Remarks: <input style="width: 90%;" type="text"/>

Org Management Forms Approval Process

- HRA completes form and initiates workflow
- KHRIS routes form through agency workflow
- Final Agency Approver completes agency workflow
- KHRIS routes form through Personnel Cabinet workflow
- Personnel Cabinet approves, rejects, or sends the form back to author
- If approved, infotypes are added and/or changed
- If rejected, infotypes are not updated
- If the action is sent back to Author the form will route back to the agency for correction

KHRIS is configured to automatically route workflow items to the appropriate approver or approvers.

Records waiting for approval are accessed through the portal in the approver's Universal Worklist (UWL).

Kentucky Personnel Cabinet
Welcome Train-2, Help | Log Off
KHRIS Self-Service Center

Home Employee Self-Service **Worklist**

Overview

Universal Worklist

Tasks (8 / 8) Alerts Notifications Tracking

Show: New and In Progress Tasks (8 / 8) All

Subject	From	Sent	Priority	Due	Status
-) for COOK I in Org# 11000325	Workflow System	Oct 30, 2008	Normal	1	New
-) for KVE MAJOR in Org# 11000325	Workflow System	Oct 30, 2008	Normal	1	New
-) for ADMINISTRATIVE SECRETARY in Org# 11000325	Workflow System	Oct 28, 2008	Normal	1	New
-) for ADMINISTRATIVE SPECIALIST III in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New
-) for ATTORNEY in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New
-) for ATTORNEY in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New
-) for ATTORNEY in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New
-) for FINGERPRINT SPECIALIST I in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New

KHRIS Workflow (Continued)

- Each agency identifies its approvers in a pre-determined order
- Each level may have only one approver or multiple approvers
- When more than one person sits at an approval level, once one person picks up the action it will be removed from the other users' worklists
- An action automatically moves to the next agency approver if not approved at any level, *other than the Final Agency Approver*, within three business days
- **The form will not leave the agency until it has been approved by the Final Agency Approver**
- HR staff who are both initiator and approver must go into their worklists and approve actions at each level to keep it moving through workflow
- The originator of the form will be notified by email:
 - Upon decision by the Agency Final Approver
 - Upon decision by the Personnel Cabinet

KHRIS Workflow (Continued)

Through the KHRIS Portal an Agency can withdraw or see where a form is in workflow using the reference number.

For an OM action, choose “Search Organizational Processes”.

The screenshot shows the KHRIS portal navigation menu. At the top, there are tabs for "Employee Self-Service" and "HR Generalist". Below the tabs is a "Welcome" message and a navigation bar with a search icon. The KHRIS logo and "Self-Service Center" are displayed. A "Detailed Navigation" section contains links for "Welcome" and "KHRIS Processes". The "KHRIS Processes" section is expanded, showing two categories: "Benefits/Employee Processes" and "Organizational Processes". Under "Benefits/Employee Processes", there are links for "Start Benefits/Employee Process", "Start Hiring Processes", "Search Benefits/Employee Processes", and "Open Benefits/Employee Processes". Under "Organizational Processes", there are links for "Start Organizational Process", "Search Organizational Processes", and "Open Organizational Processes".

The screenshot shows the "Search Organizational Processes" form. The form has a title bar "Search Organizational Processes". Below the title bar, there are input fields for "Object type:" (set to "Organizational unit"), "Object ID:", "Object abbreviation:", and "Object name:". A "Start" button is located below these fields. To the right of the input fields is a search results table with columns "Description" and "Number". The table contains one row with the text "Enter a Search Criterion and Perform Search". Below the table are "Filter Settings" and "Data From: 00/00/0000 00:00:00 Refresh" and "Include Objects" buttons. Below the search results table, there are input fields for "Process:", "Started By:", "Process Status:", and "Involved Processor:". Below these fields are "Process Criteria" and "Step Criteria" sections. The "Process Criteria" section has input fields for "Process Reference Number:", "Started On:", and "Ended On:". The "Step Criteria" section has input fields for "Processor:" and "Step Status:". At the bottom of the form are "Start" and "Close Extended Search" buttons.

Exercise 4.4: Search/Withdraw an Action in Workflow

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Purpose:

Perform this procedure when you need to withdraw or locate an action in workflow.

1. Why is workflow important?
2. True or False? Everyone can see the same screens. Explain your answer.
3. Can you withdraw an action during the workflow process?



Agencies maintain the following infotypes using transaction code PO13 Maintain Position.

- IT 1001 Relationships
 - A002 Reports To
 - B002 Line Supervisor
 - BZ01 Time Approver
- IT 1018 Cost Distribution
 - Assign Additional Cost Centers
 - Identify WBS Element or Order Number
 - Identify Functional Areas
- IT 9101 Adl Position Info
 - Working Title (Unclassified Only)
 - Hours Limit on Position

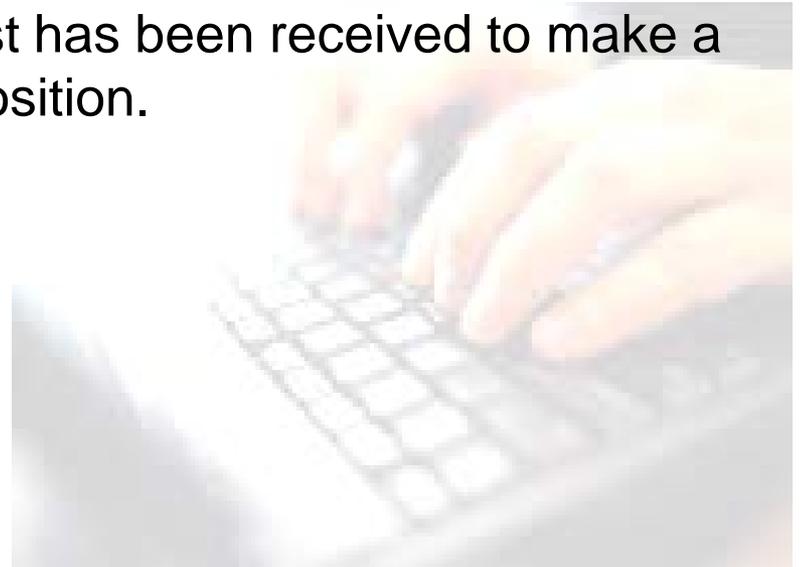
Exercise 4.5: Maintain Position

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Transaction: PO13

Purpose:

Perform this procedure when a request has been received to make a change to infotype data stored for a position.



Delimiting a position(s) allows you to change an object's validity period.

- Delimit if position(s) is no longer needed or if it was established in error
- When objects are delimited, KHRIS will delimit all infotypes associated with the object
- A position(s) cannot be delimited if an employee is assigned to it
- Agencies have access to delimit a position(s) in real-time
 - No workflow
 - Always run in test mode first

Delimit Position(s)

Selection Criteria

Position

Delimitation Date 01/22/2015

Program Mode

Test Mode

Production Mode

Exercise 4.6: Delimit Position(s)

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Transaction: ZOME012

Purpose:

You need to put an end to a position(s).



Display 0001 Organizational Assignment

Org Structure

Personnel No: 155307 Name: Carol McFarland

EE group: A 18A Personnel area: 0001 Executive Status: Active

EE subgroup: 02 ASC Salary 37.5 Pers. subarea: 1001 FT N-Exempt

Start: 05/02/2010 to 12/31/9999 Chng: 08/02/2010 CONVADM

Enterprise structure

CoCode: COMK Commonwealth of Kentucky

Pers. area: 0001 Executive Subarea: 1001 FT N-Exempt

Cost Ctr: 5372900000 Dept for Mh, Dev Dis Bus. Area: 1000 Commonwealth of Kentucky

Func. Area:

Personnel structure

EE group: A 18A Payr. area: SM Semi-monthly

EE subgroup: 02 ASC Salary 37.5 Contract:

Organizational plan

Percentage: 100.00

Position: 30031917 62110V000101 ALCOHOL & DRUG REI

Job key: 20001077 62110V000101 Alcohol & Drug Rehabil

Exempt: E

Org. Unit: 10003748 53729 Support Services Unit

Org. key: 00015372900000

Administrator

Time:

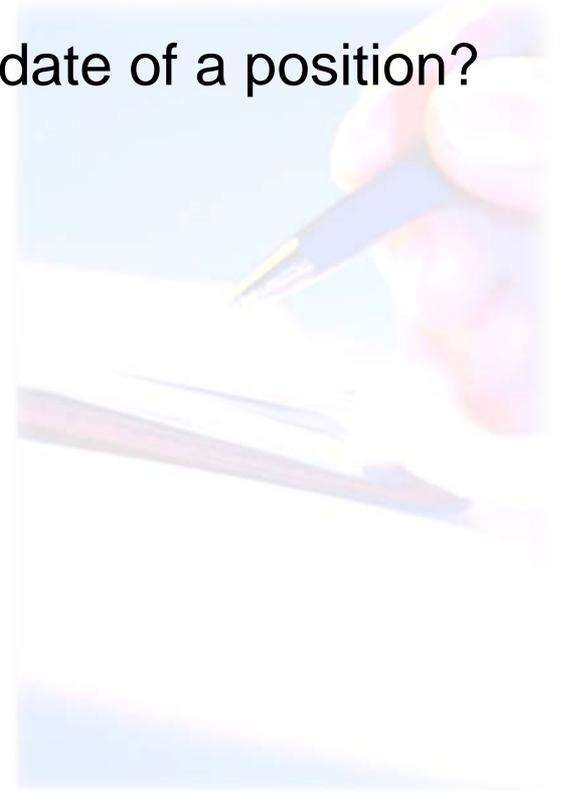
Enterprise structure

Personnel structure

Organizational structure

Knowledge Check

1. What relationships are required for every position?
2. What are the relationships Agencies are responsible for maintaining?
3. What process is used to change the end date of a position?
4. Where are the HCMPF forms located?



In this lesson you learned to:

- Explain the concept of positions
- Display position infotypes
- Print a position description
- View forms used to initiate OM actions
- Describe the process to:
 - Establish a position
 - Reclassify a position
 - Maintain a position
 - Delimit a position





Reporting

Lesson 5

Lesson 1: OM Overview

Lesson 2: Organizational Units

Lesson 3: Jobs

Lesson 4: Positions

Lesson 5: Reporting

Wrap-up

By the end of this lesson participants will be able to:

- Identify the reports used for Org Management
- Navigate a report

The term *reporting* refers simply to the display of data on one or more objects.

Reports are created by two types of transactions:

- **Display** transactions, which report data on one object
- **List-display** transactions, which report data on multiple related objects

Display transactions call up individual master records and documents so that they can be examined in all their detail.

The display transaction initial screens usually require:

- Object type code
- Object identification code
- Reporting dates
- Selection of infotype to be displayed

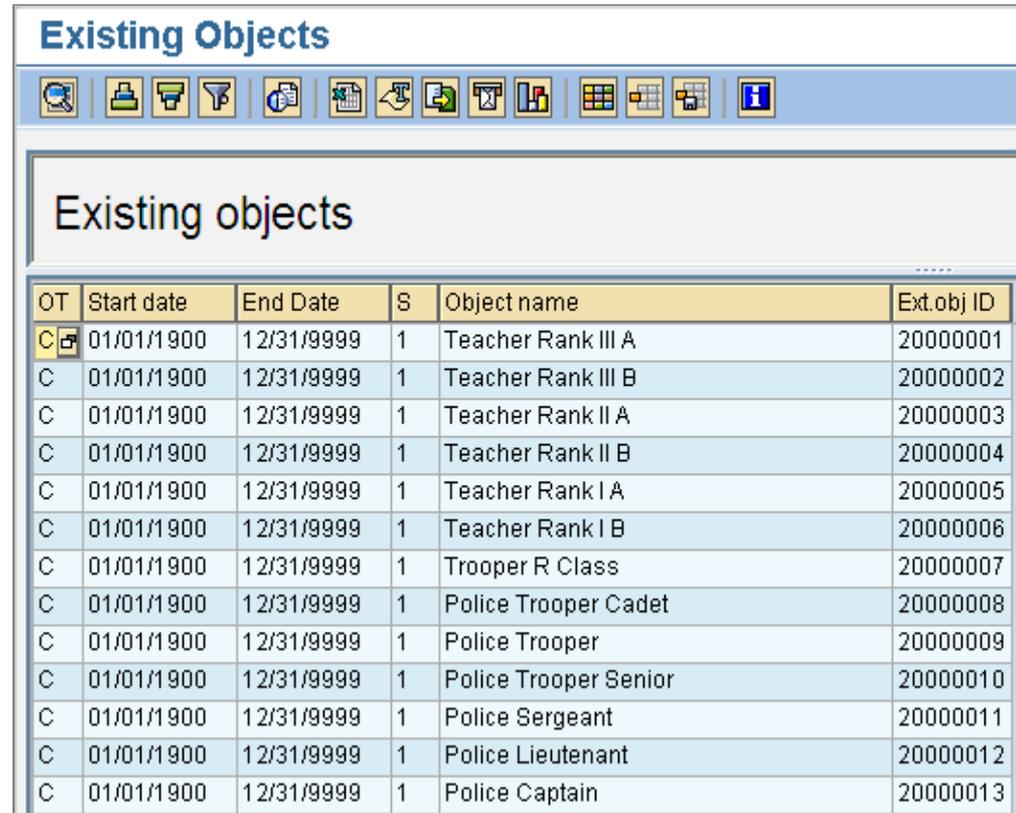
Two commonly used display transactions in KHRIS are:

- *Organization and Staffing Display (PPOSE)* for the Commonwealth org structure
- *Display Position (PO13D)* for information about positions

List – Display Transactions

List-display transactions offer the greatest versatility and depth of reporting:

- Initial screens can be customized for fast entries
- Data is reported in an easy-to-read line-item table that can be customized
- Reports can be “drilled down into” for displays of single master records or documents
- Most reports can be exported to *Excel*



OT	Start date	End Date	S	Object name	Ext.obj ID
C	01/01/1900	12/31/9999	1	Teacher Rank III A	20000001
C	01/01/1900	12/31/9999	1	Teacher Rank III B	20000002
C	01/01/1900	12/31/9999	1	Teacher Rank II A	20000003
C	01/01/1900	12/31/9999	1	Teacher Rank II B	20000004
C	01/01/1900	12/31/9999	1	Teacher Rank I A	20000005
C	01/01/1900	12/31/9999	1	Teacher Rank I B	20000006
C	01/01/1900	12/31/9999	1	Trooper R Class	20000007
C	01/01/1900	12/31/9999	1	Police Trooper Cadet	20000008
C	01/01/1900	12/31/9999	1	Police Trooper	20000009
C	01/01/1900	12/31/9999	1	Police Trooper Senior	20000010
C	01/01/1900	12/31/9999	1	Police Sergeant	20000011
C	01/01/1900	12/31/9999	1	Police Lieutenant	20000012
C	01/01/1900	12/31/9999	1	Police Captain	20000013

Organizational Management Reports

AREA	Report Title	Transaction Code	Is Add'l Documentation/ Instruction Available?	Description
OM	Job Title List	ZOMQ0003	YES	This report can be used to display a list of job titles.
OM	Job Info List	ZOMQ0002	YES	This report can be used to display a list of job titles and pay scale information.
OM	Organizational Structure with Persons	S_AHR_61016495	YES	This report can be used to display the org structure with persons starting with a specified org unit.
OM	Organizational Structure with Positions	S_AHR_61016494	YES	This report can be used to display the org structure with positions starting with a specific org unit.
OM	Report Structure with Persons/Subordinates	S_AHR_61016513	YES	Provides reporting structure by showing the hierarchical structure of positions and the holders of these positions in relation to one another.
OM	Working Title	ZOMQ0006	NOT AT THIS TIME	This report can be used to determine the working title for a position. [Working title must have been created on IT 9101 otherwise the report will be blank.]
OM	Cap Analysis	ZOM_CAPANALYSIS	YES	Use this report to display the capacity and actuals for each organization unit
OM	Job Index	S_AHR_61016498	YES	This report will provide you with a list of position numbers, name of holders and their perner for one particular job
OM	Position Control Summary	ZOMR010_POS	YES	Use this report to display a summary of statistics for an Organizational Unit.
OM	P25 Notice	ZOMR007_P25_LIST	YES	Use this report to display the positions that have been reallocated on a particular date. This report also display the current and previous information.
OM	Employee & Cost Distribution	ZOMR028	YES	Use this report to display the cost center assigned to each employee within an Org Unit
OM	Function Group Report	ZOMR030	YES	This is the report gives you the Function Group assigned to positions within a certain org unit.
OM	Position Occupancy Report	ZOMR010	YES	This report gives the total filled, vacant and interim positions within a Cabinet, Department or Agency.

Exercise 5.1: Navigate a Report

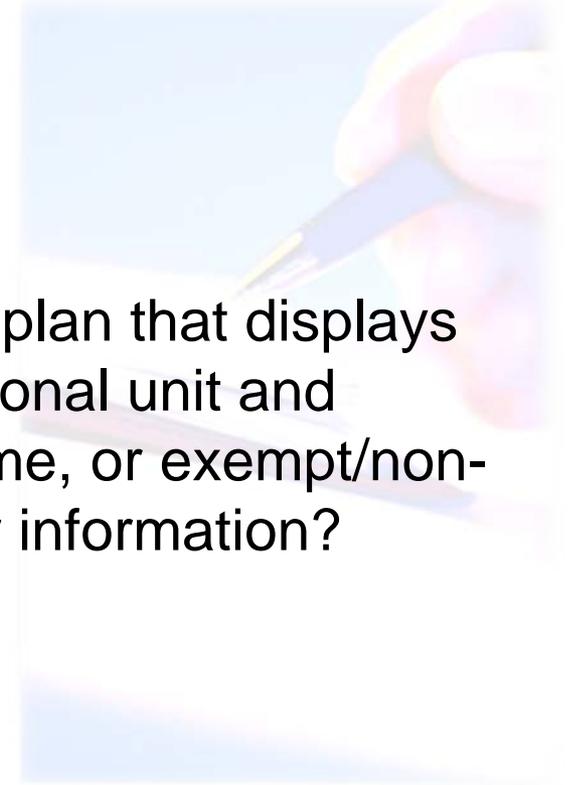
Follow along as your instructor leads you through the steps:

Transaction: S_AHR_61016498

Purpose:

The instructor will guide you through the basic steps to complete the navigation of a report.

1. True or False? Display transactions offer information on multiple objects.
2. Some reports may be downloaded to which of the following?
 - a. Word
 - b. Excel
 - c. PowerPoint
3. What report generates an organizational plan that displays the positions assigned to each organizational unit and whether they are filled/vacant, full/part-time, or exempt/non-exempt and employees' race and gender information?



In this lesson you learned to:

- Identify the reports used for Org Management
- Navigate a report





Wrap-up

KHRIS Jeopardy

This process will end a record	Provides a clear picture of the Commonwealth at any point in time	Describes an employee's position in the Commonwealth
Describes the Commonwealth's business units	What is KHRIS?	The foundation from which positions are created
Represents a specific task performed by a person	Ties the HR structure to the finance structure	Data grouped together on a screen into areas with similar content

Participants should now be able to:

- Define Organizational Management
- Describe the org management structure
- Explain relationships and inheritance to org management objects
- Identify object infotypes
- Display organizational structure, jobs, and positions
- Print a Job Specification
- Print a Position Description
- Maintain relationships on a position
- Identify Human Capital Management Process forms
- Describe the workflow approval process
- Navigate reports

Need Assistance

The Personnel Cabinet website provides resources and services to assist HR professionals with tasks related to KHRIS. For more information visit hr.personnel.ky.gov.



Questions and Answers



Your feedback is invaluable to the success of KHRIS

