

Organizational Management

Lesson 1 – OM Overview

Exercise 1.1: Display Organizational Structure

Scenario:

This transaction provides hierarchical views of where an organizational unit and its staffing sit within the organization.

Use the following to complete the exercise:

KHRIS T-Code	PPOSE
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Data needed to complete the transaction:

Task	Data
<i>Organization and Staffing Display</i>	
Click Organizational Unit	
Click Search Term	
<i>Find Organizational Unit</i>	
With name	Investigations*
Click Find	
<i>Organization and Staffing Display</i>	
Click Investigations & Litigation Branch	
Click to enter.	
Click to open the Investigations & Litigations Branch information	
Click to view the Column Configuration	
Select <input checked="" type="checkbox"/> Code <input checked="" type="checkbox"/> ID <input checked="" type="checkbox"/> Relationship text <input checked="" type="checkbox"/> Chief	
Click . Notice the ID field is now displayed in the Staff Assignments section of the screen.	
Click .	



Lesson 2 – Organizational Units

Exercise 2.1: Display Org Units

Scenario:

You want to view information stored on the infotypes associated with organizational units.

Use the following to complete the exercise:

KHRIS T-Code	PO10D
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Data needed to complete the transaction:

Task	Data
<i>Display Organizational Unit</i>	
Organizational Unit	10000530
Click 	
Select the All radio button <input checked="" type="radio"/> All	
Click <input type="checkbox"/> beside Object - IT 1000.	
Click Display infotype 	

Display Object – IT 1000

Answer the following questions:

1. What is the Object Name?

2. What is the end date of this record?

Click  to go back

Display Organizational Unit

Click Relationships - IT 1001.

Click Overview  to see an overview of the history.

List Display Relationships – IT 1001

Answer the following questions:

1. How many records are available to review for this infotype?
2. What are the Relationship Objects?
3. What are the related Objects to this Org Unit?

Click the first line item.

Click Choose  to select the record.

Display Relationships – IT 1001

Click Next record  to review each record Relationship record.

Answer the following question:

1. Is there a qualification for this org unit?

Click  twice to go back.

Display Organizational Unit

Click Description - IT 1002.

Click Overview  to see an overview of the history.

List Display Description – IT 1002

Click to select the line item.

Click Choose  to select the record.

Click  twice to go back.

Display Organizational Unit

Click Acct. Assignment - IT 1008.

Click Display infotype 

Display Acct. Assignment – IT 1008

Answer the following question:

1. What is the KEIN?

Click  to go back.

Display Organizational Unit

Click  Address - IT 1028.

Click Display infotype 

Display Address – IT 1028

Answer the following question:

1. Does this position contain more than one working address?

Click  to go back.

Display Organizational Unit

Click  KY Hierarchy - IT 9104.

Click Display infotype 

Display KY Hierarchy – IT 9104

Answer the following question:

1. What are the Cabinet and Department numbers?

Click  to go back.

Display Organizational Unit

Click  exit.

Lesson 3 – Jobs

Exercise 3.1: Display Job Infotypes

Scenario:

You need to view information stored on the infotypes associated with a job in order to assure administrative regulations that govern the classification plans for positions are the same within the classified service.

Use the following to complete the exercise:

KHRIS T-Code	PO03D
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Data needed to complete the transaction:

Task	Data
<i>Display Job</i>	
Job	Finan*

Click  to enter.

Entries Found

Click **Financial Institutions Examiner II**

Click  to accept.

Display Job

Select the All radio button All

Click beside **Object - IT 1000**.

Click **Display** 

Display Object IT 1000

Click  to exit.

Display Job

Click **Relationships - IT 1001**.

Click **Overview** 

List Display Relationships – IT 1001

Answer the following questions:

1. How many records are available to review for this infotype?

2. What are the Relationship Types?

3. What is the related Objects to the 3rd item in the list?

Click  beside the first line item.

Click Choose  to select the record.

Display Relationships – IT 1001

Click Next record  to review each record Relationship record.

Click  to exit.

Display Job

Click  Planned Comp - IT 1005.

Click Display 

Display Planned Comp – IT 1005

Click  to page through the information

Answer the following questions:

1. How many pay grades are listed for this job?

2. What is/are the Pay Grade type(s)?

Click  to exit.

Display Job

Click  US Job Attributes - IT 1610.

Click Display infotype 

Display US Job Attributes – IT 1610

Answer the following question:

1. What is the EEO code for this job?

Click  to exit.



Display Job
Click <input type="checkbox"/> KY Job Spec - IT 9103.
Click Display infotype 
Click the Print icon  to print the Job Spec
Save
Display KY Job Spec – IT 9103
Answer the following question:
1. What is the extended amount of time for their initial probationary period for this Job?
Click <input type="checkbox"/> to scroll down to answer the following questions.
Answer the following questions:
1. What are the post employment requirements for this Job?
2. Are there any typical working conditions for this Job?
Click  to exit.
Display Job
Click <input type="checkbox"/> Special Ent. Rate - IT 9105.
Click Display infotype 
Display Special Ent. Rate - IT 9105
Answer the following question:
1. What is the SER hourly amount?
Click  to exit.
Display Job
Click  to exit.



Lesson 4 - Positions

Exercise 4.1: Display Position Infotypes

Scenario:

You need to know specific information about a position.

Use the following to complete the exercise:

KHRIS T-Code	PO13D
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Data needed to complete the transaction:

Task	Data
<i>Display Position</i>	
Position	30007866
Click  to enter.	
Select the All radio button <input checked="" type="radio"/> All	
Click <input type="checkbox"/> Object - IT 1000.	
Click Display 	
<i>Display Object IT 1000</i>	
Click  to exit.	
<i>Display Positon</i>	
Click <input type="checkbox"/> Relationships - IT 1001.	
Click Overview 	

List Display Relationships – IT 1001

Answer the following questions:

1. How many records are available to review for this infotype?
2. What are the Relationships listed?

Click  the first line item.

Click Choose  to select the record.

Display Relationships – IT 1001

Click  to view each of the relationships.

Click  to exit.

Display Position

Click  Planned Comp - IT 1005.

Click Display infotype 

Display Planned Comp – IT 1005

Answer the following question:

1. What is the pay grade type?

Click  to go back.

Display Position

Click  Vacancy - IT 1007.

Click Display infotype  Also displays Requisition

Display Vacancy – IT1007

Answer the following question:

1. Is this position open or filled?

Click  to go back.



Display Position
Click <input type="checkbox"/> Acct. Assignment - IT 1008.
Click Display infotype
Display Acct. Assignment – IT 1008
Answer the following question:
1. What is the Personnel SubArea for this Position?
Click to go back.
Display Position
Click <input type="checkbox"/> Emp Grp/SubGrp - IT 1013.
Click Display infotype
Display Emp Grp/SubGrp – IT 1013
Answer the following question:
1. What is the Employee Group for this Position?
Click to go back.
Display Position
Click <input type="checkbox"/> Cost Distribution - IT 1018.
Click Display infotype
Display Cost Distribution - IT 1018
Answer the following question:
1. What is the Master Cost Center for this position?
Click to go back.
Display Position
Click <input type="checkbox"/> Adl Position Info - IT 9101.
Click Display infotype
Display Adl Position Info – IT 9101
Answer the following question:
1. What is the Work County for this position?
Click to exit.

Display Position

Click  **KY Position Des - IT 9102.**

Click **Display infotype** 

Click the Print icon  to print the Position Description

Save

Answer the following question:

1. What percentage is the first task or duty performed by this position?

Click  to exit.

Exercise 4.2: Establish Position with Description Form

Agency does an exercise. Personnel Cabinet – this is a demonstration only.

Scenario:

Complete this form when it is necessary to request a new position as required for temporary or permanent reorganization.

Use the following to complete the exercise:

KHRIS T-Code

Use Log On to access Portal

Data needed to complete the transaction:

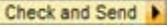
Task	Data
<i>Welcome to Employee Self-Service</i>	
Click HR Generalist tab	HR Generalist
<i>Welcome to KHRIS Online Benefits Administration System</i>	
Click KHRIS Processes tree item	KHRIS Processes
<i>Worklist</i>	
Click Start Organizational Process link.	
<i>Start Processes</i>	
Object type	Organizational Unit
Object ID	10002566
Click Start	Start
Click <input type="checkbox"/>	Dining Room Sales & Service Unit 10002566
Click Start Process	Select Process
Click <input type="checkbox"/>	Establish with Position Description.
Click Edit	Edit
<i>Start Processes</i>	
Begin Date	Use the beginning of the next pay period
Job Number	20000527
Select Enter on the keyboard for the Job information populate in	
What is the NEW POSITION #: _____	
Personnel Area	Executive
Personnel SubArea	FT Exempt
Employee Group	18A
Employee SubGroup	ASC Hourly 37.5



Pay Grade Type	Hourly
Pay Grade Area	Classified
Verify Included in CAP radio button is selected.	
Work County	Bell
Function Group	Parks
Time Approver	30022370
Cost Center	5067000000
Supervisor Pos No	30004454
Order Number	C91436
Unit	1914
Location	
Activity	0036
WBS Element	Auto Populates from the Unit, Location and/or activity, if those are needed
Click Auto populate from Proposed Job	
Statement of Duties	Acts as lead worker in a crew performing a variety of operational tasks in a state park; OR Acts as lead worker performing tasks and duties in the operation, maintenance and repair of the physical plant facilities and grounds of a state park; and performs other duties as required.
Task 1	Develops programs to support the operation of the parks.
%	50
Task 2	Responsible for entering time sheets for branch staff.
%	30
Task 3	Oversee interim staff in completion of scanning duties
%	15
Task 4	Othe duties as assigned
%	5
Supervisor ID	39
Does the incumbent of this position conduct performance appraisals on subordinate employees?	No
Does the incumbent of this position supervise employees, inmates, interim employees, etc...	Yes 31000725, 30000154 and 31000875
Check box beside: Maintain a valid driver's license	
Click box beside: Lift heavy objects or work in uncomfortable positions for extended periods of time	
Click box beside: Be exposed to dangerous working conditions including rough terrain	





Click Check and Send 
Click Send 
<i>Start Processes</i>
What is the Reference # _____
Select Close 



Exercise 4.3: Reclassification with Position Description Form

Agency does an exercise. Personnel Cabinet – this is a demonstration only.

Scenario:

Complete this form when it is reclassify a position.

Use the following to complete the exercise:

KHRIS T-Code

Use Log On to access Portal

Data needed to complete the transaction:

Task	Data																												
<i>Welcome to Employee Self-Service</i>																													
Click HR Generalist tab	HR Generalist																												
<i>Welcome to KHRIS Online Benefits Administration System</i>																													
Click KHRIS Processes tree item	KHRIS Processes																												
<i>Worklist</i>																													
Click Start Organizational Process link.																													
<i>Start Processes</i>																													
Object type	Position																												
Object ID	<table border="1"> <thead> <tr> <th>ID</th> <th>Data</th> </tr> </thead> <tbody> <tr> <td>Instructor</td> <td>31003460</td> </tr> <tr> <td>Instructor</td> <td>31003462</td> </tr> <tr> <td>Instructor</td> <td>31003463</td> </tr> <tr> <td>Student 01</td> <td>31003464</td> </tr> <tr> <td>Student 02</td> <td>31003465</td> </tr> <tr> <td>Student 03</td> <td>31003466</td> </tr> <tr> <td>Student 04</td> <td>31003467</td> </tr> <tr> <td>Student 05</td> <td>31003468</td> </tr> <tr> <td>Student 06</td> <td>31003469</td> </tr> <tr> <td>Student 07</td> <td>31003470</td> </tr> <tr> <td>Student 08</td> <td>31003471</td> </tr> <tr> <td>Student 09</td> <td>31003472</td> </tr> <tr> <td>Student 10</td> <td>31003473</td> </tr> </tbody> </table>	ID	Data	Instructor	31003460	Instructor	31003462	Instructor	31003463	Student 01	31003464	Student 02	31003465	Student 03	31003466	Student 04	31003467	Student 05	31003468	Student 06	31003469	Student 07	31003470	Student 08	31003471	Student 09	31003472	Student 10	31003473
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Student 10	31003473																												





	Student 11	31003474
	Student 12	31003475
	Student 13	31003476
	Student 14	31003477
	Student 15	31003478
	Student 16	31003479
	Student 17	31003480
	Student 18	31003481
	Student 19	31003482
	Student 20	31003483
	Student 21	31003484
	Student 22	31003485
	Student 23	31003486
	Student 24	31003487
	Student 25	31003488

Click **Start**

Click **Assistant Director**

Click **Start Process**

Click **Reclassification with Position Description Change.**

Click **Edit**

Start Processes

Begin Date Beginning of next pay period

Job Number 20001747

Click Enter on your keyboard to auto populated the new Job information.

Click Auto populate from Proposed Job check box

Statement of Duties	Coordinates the work of professional staff and performs analysis and makes recommendations regarding policy and/or budget issues; OR, performs functional supervision over technical policy or budget activities of an agency; and performs other duties as required.
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Task 1	Coordinates and oversees the work of personnel engaged in budget preparation, analysis and/or the evaluation of management policies, procedures, legislation and research.
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%	40
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Task 2	Monitors expenditures and revenues to verify accuracy, reliability and compliance with budgets.
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%	30
---	----

Task 3	Provides functional supervision in implementing agency and cabinet programs.
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%	20
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Task 4	Other Duties as Assigned
%	10
Supervisor ID	39
Does the incumbent of this position conduct performance appraisals on subordinate employees?	No
Does the incumbent of this position supervise employees, inmates, interim employees, etc...	Yes 31000725, 30000258 and 31000125
Check box beside: Maintain a valid driver's license	
Click box beside: Be exposed to dangerous working conditions including rough terrain	
Click box beside: Lift heavy objects or work in uncomfortable positions for extended periods of time	
Click Check and Send <input type="button" value="Check and Send"/>	
Click Send <input type="button" value="Send"/>	
Start Processes	
What is the Reference # _____	
Select Close <input type="button" value="X"/>	

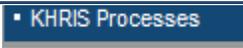


Exercise 4.4: Search/Withdraw an Action in Workflow

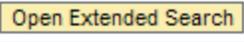
Scenario:

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

Click HR "Generalist tab" 

Click "KHRIS Processes" tree item 

Click "Search Organizational Processes" 

Click "Open Extended Search" 

Enter the Reference Number of the action you are searching for in the "Process Reference Number"
Process Criteria

Process Reference Number: 

Select "Start" 

Click "Details"

View where Action is in workflow or withdraw. (Click withdraw process)

Exercise 4.5: Maintain Position

Scenario:

You need to Change a relationship stored on a position.

Use the following to complete the exercise:

KHRIS T-Code

PO13

Data needed to complete the transaction:

Task	Data
<i>Maintain Position</i>	
Position	Data
	Instructor 31003460
	Instructor 31003462
	Instructor 31003463
	Student 01 31003464
	Student 02 31003465
	Student 03 31003466
	Student 04 31003467
	Student 05 31003468
	Student 06 31003469
	Student 07 31003470
	Student 08 31003471
	Student 09 31003472
	Student 10 31003473
	Student 11 31003474
	Student 12 31003475
	Student 13 31003476
	Student 14 31003477
	Student 15 31003478
	Student 16 31003479
	Student 17 31003480
	Student 18 31003481
	Student 19 31003482
	Student 20 31003483
Student 21 31003484	
Student 22 31003485	
Student 23 31003486	





	Student 24	31003487
	Student 25	31003488

Maintain Position: Reports to Relationship

Enter Position number given above

Click **Enter**

Select the All radio button All

Click **Relationships - IT 1001.**

Click Overview

List display with change Relationships – IT 1001

Click beside the A 002 Reports to

Click **Copy**

Copy Relationships – IT 1001

Valid from Tomorrow's date

Valid to 12/31/9999

ID of related object

ID	Data
Instructor	31004030
Instructor	31004031
Instructor	31004032
Student 01	31004033
Student 02	31004034
Student 03	31004035
Student 04	31004036
Student 05	31004037
Student 06	31004038
Student 07	31004039
Student 08	31004040
Student 09	31004041
Student 10	31004042
Student 11	31004043
Student 12	31004044
Student 13	31004045
Student 14	31004046
Student 15	31004047
Student 16	31004048
Student 17	31004049
Student 18	31004050
Student 19	31004051



	<table border="1"> <tr><td>Student 20</td><td>31004052</td></tr> <tr><td>Student 21</td><td>31004053</td></tr> <tr><td>Student 22</td><td>31004054</td></tr> <tr><td>Student 23</td><td>31004055</td></tr> <tr><td>Student 24</td><td>31004056</td></tr> <tr><td>Student 25</td><td>31004057</td></tr> </table>	Student 20	31004052	Student 21	31004053	Student 22	31004054	Student 23	31004055	Student 24	31004056	Student 25	31004057
Student 20	31004052												
Student 21	31004053												
Student 22	31004054												
Student 23	31004055												
Student 24	31004056												
Student 25	31004057												
Click Enter													
Click Save													
The Relationships-IT1001 Create pop up displays. Click <input type="button" value="Yes"/> to delimit the record.													
List display with change Relationships – IT 1001													
Click Back													
Maintain Position: Maintain Cost Center													
Click <input type="checkbox"/> Cost Distribution – IT1018													
Click Overview													
List display with change Cost Distribution-IT 1018													
Click <input type="checkbox"/> beside the line item													
Click Copy													
Copy Cost Distribution-IT 1018													
Start Date	Today's date												
We will add an additional cost center 3104000000: Change existing percentage to 50% and new to 50%													
Click													
Click Save													
The Cost Distribution-IT1018 Create pop up displays. Click <input type="button" value="Yes"/> to delimit the record.													
Click Back													
Maintain Position: Maintain Order Number													
Click <input type="checkbox"/> Cost Distribution – IT1018													
Click Copy													
Copy Cost Distribution-IT 1018													
Start Date	Tomorrows Date												
We will change the Order Number to GWA001													
Click													
Click Save													
The Cost Distribution-IT1018 Create pop up displays. Click <input type="button" value="Yes"/> to delimit the record.													
Click to go back.													

Exercise 4.6: Delimit Position (Agency Only)

Scenario:

A position needs to be abolished and no one holds the position.

Use the following to complete the exercise:

KHRIS T-Code

ZOME012

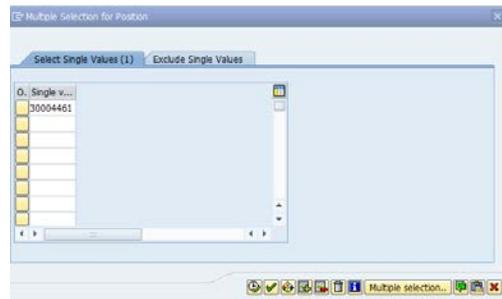
Data needed to complete the transaction:

Task	Data		
<i>Delimit a Position</i>			
Positions	ID	Data	Data
	Instructor	31003370	30004424
	Instructor	31003371	30004425
	Instructor	31003372	30004426
	Student 01	31003373	30004427
	Student 02	31003374	30004428
	Student 03	31003375	30004429
	Student 04	31003376	30004430
	Student 05	31003377	30004431
	Student 06	31003378	30004432
	Student 07	31003379	30004433
	Student 08	31003380	30004434
	Student 09	31003381	30004435
	Student 10	31003382	30004436
	Student 11	31003383	30004437
	Student 12	31003384	30004438
	Student 13	31003384	30004439
	Student 14	31003385	30004440
	Student 15	31003386	30004441
	Student 16	31003387	30004442
	Student 17	31003388	30004443
	Student 18	31003389	30004444
	Student 19	31003390	30004445
	Student 20	31003391	30004446
	Student 21	31003392	30004447
	Student 22	31003393	30004448
	Student 23	31003394	30004450
Student 24	31003395	30004451	
Student 25	31003396	30004452	

Enter the First position

Click the multiple selection icon 

Enter additional positions you wish to delimit.



Click **Execute** 

Delimitation Date

Today's date

Click **Execute** 

Click  to go back.

Click to select the **Production Mode** check box.

Click **Execute**  to start process.

Decession

Click **YES**.

Display Delimited Objects

Click  to go back.

Delimit a Position

Click  to go back.

Lesson 5 - Reporting

Exercise 5.1: Execute Report

Scenario:

You need to know specific information about who is assigned to positions in your organizational unit.

Use the following to complete the exercise:

KHRIS T-Code

S_AHR_61016503

Data needed to complete the transaction:

Task	Data
<i>Staff assignments</i>	
Organizational unit	10000386
Key date	Today's date
Click 	
Click 	
<i>Change Layout</i>	
Press and hold the Ctrl key on the keyboard.	
In the Displayed Columns section, click Chief, Employee group, and Employee subgroup to select the items. (They will be highlighted in yellow). Be sure only these three items are highlighted.	
Click 	to move the fields to the Column Set section.
In the Column Set section click Personnel no.	
Click 	to move the field to the Displayed Columns section.
Click on Personnel no. to highlight the item.	
Click 	several times to move the Personnel no. item until it is the 4 th item in the list.
Click 	
<i>Export Reprt to an Excel Spreadsheet</i>	
Click Local File 	
Choose to save the report as a Spreadsheet	
Click 	

Click  to change the Directory to Desktop, click Save
Click  to change the File Name
Name your report and click save
Click 
Click  to exit.
Click  to go back.
Now go to your Desktop and find your Excel Spreadsheet.