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| --- | --- |
| HR/Payroll  Data Owner Handbook  ERP Roles  Business Objects  Role Matrix (Revised) April 18, 2024 | OSC_Logo_FINAL.gif |

\*No information should be updated/changed in this Data Owner Handbook, or in any of the attached documents included on the last page.

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# Data Owner Roles and Responsibilities

## Data Owner Overview

* Data Owners are appointed by their agency.
* Data Owners are responsible to approve changes or additions to role to position/user mappings.
* The Data Owner will be the point person to approve changes for access.
* Data Owners with the correct security access will be able to create and submit security change requests.
* An existing Data Owner will need to follow the [Create and Submit Security Change Request](#_Creating_a_Security) process to have the correct Security Role assigned to the new Data Owner.
* An existing Data Owner will need to be the current Data Owner for the requesting Agency.
* An existing Data Owner can remove themselves from being a data owner and add another employee as a Data Owner.
* An employee that is not a Data Owner cannot send in a request to add or remove a person from being a Data Owner.

Best practice is to have a backup Data Owner for your Agency!!

# Benefits Administration

# Security Roles By Area

# [Matrix](#_ERP_Role_Assign)

# Benefits

|  |  |
| --- | --- |
| Display Benefits |  |
| Overview The role allows the user to generate reports that are related to benefit selection and ongoing administration. This role can view benefit-related information but does not have the ability to update employees’ benefit information. The employee assigned to this role should be someone that communicates benefit enrollment schedules. | |
| Related Business Processes | |
| * Benefits Enrollment – NC Flex, SHP, EOI, New Hire/Reinstatement * HR Initiated Benefit Changes – Termination (LOA and non-LOA), Retirement * Non-SAP Benefits – Savings Plans and Supplemental Benefits * Employee Initiated Benefit Changes – Life Change Events  Role Conflicts | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | |
| Training Recommended training:   * BN200 Benefit Display and Reporting | |

# Organizational Management

|  |  |  |
| --- | --- | --- |
|  | | |
| Agency Position Funding Approver (Training Required) | |  |
| Overview The role allows the user to approve position actions involving changes to position salary (creation of new positions and salary adjustments). This role conducts actions that are like the budget approval function formerly performed in PMIS by the agency Salary Control Officer. Tasks/Responsibilities | |  |
| * Maintain position salary amounts and cost distribution data.  Related Processes  * Create or Edit Position  Role Conflicts Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * HR Master Data Maintainer * HR Master Data Approver  |  | | --- | | If either or both roles are required for work, please fill out and submit [SOD form](#_Segregation_of_Duties)Role Dependencies Those assigned this role will also be assigned the following roles:   * Display Organization Management * Display Salary & Pay Grade * Display Non-Sensitive HR * Workflow Role (FA1 – Funding Approver) * Funding Approver BOBJ reports | | Training Required training:   * OM200 Organizational Management Overview * WF225 Funding Approval | | | |
| Display Organization Management |  | |
| Overview This role allows the user to display the organization structure, positions, and jobs within the organization; along with the employees that have been assigned to the positions. | |  |
|  | | |
| Tasks/Responsibilities | | |
| * View job classification reports. * View organizational management reports, including organizational structure. * View position reports, including employees who have been assigned to positions. | | |
| Related Processes | | |
| * Create or Edit Position * Create and Maintain Organizational Unit | | |
| Role Conflicts | | |
| Employees assigned this role should *not* be assigned the following roles due to segregation of duties conflicts.  If any of the below roles are required to perform business duties, please follow the Segregation of Duties Approval Process:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * Agency Org. Charting Roles | | |
| Training | | |
| Recommended training:   * OM200 Organization Management Overview | | |

|  |  |
| --- | --- |
| OM Position Approver (Training Required) |  |
| Overview This role allows the user to approve the creation of a new position or changes to an existing position for an organization. Tasks/Responsibilities |  |
| * Approve the creation of a new position or changes to an existing position. | |
| Related Processes | |
| * Create or Edit Position * Create and Maintain Organizational Unit | |
| Role Conflicts | |
| Employees assigned this role should *not* be assigned the following roles due to segregation of duties conflicts.  If any of the below roles are required to perform business duties, please follow the Segregation of Duties Approval Process:   * N/A | |
| Role Dependencies | |
| Those assigned this role will also be assigned the following roles:   * Display Organization Management * Workflow Role (AA1 - Agency or DA1 Division) * OM BOBJ Reports * Funding Approver BOBJ reports | |
| Training | |
| Required training:   * OM200 Organization Management Overview * WF220 SAP Workflow for Approvers | |

|  |  |
| --- | --- |
| OM Position Requestor (Training Required) |  |
|  | |
| Overview | |
| This role allows the user to create new positions and make changes to existing positions for an organization. |  |
| Tasks/Responsibilities | |
| * Identify a work area or business function within an agency. * Identify positions related to a business function within an agency. * Request creation of a new position or changes to an existing position within an agency. | |
| Related Processes | |
| * Create / Edit Job * Create and Maintain Organizational Unit | |
| Role Conflicts | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | |
| Role Dependencies | |
| Those assigned this role will also be assigned the following roles:   * Display Organization Management * Workflow Role (AA1/DA1 are not assigned) * OM BOBJ reports | |
| Training | |
| Required training:   * OM200 Organization Management Overview * OM210 Organizational Management for Agencies | |

# Payroll Administration

|  |  |  |  |
| --- | --- | --- | --- |
| Display Payroll | |  | |
| Overview | | | |
| This role allows the user to display payroll results, W-4 withholding, payroll journal and payday calendar. | | |  |
| Tasks/Responsibilities | | | |
| * Display pay dates. * Display payroll results. * Print pay advices as required. * View general tax information. * View non-sensitive HR data. * View payroll journals. * View payroll statistics. * View time data. * View W-4 information. | | | |
| Related Processes | | | |
| * N/A | | | |
| Role Conflicts | | | |
| Those assigned to this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | | |
| Role Dependencies | | | |
| Those assigned this role will also be assigned the following roles:   * Payroll BOBJ Reports | | | |
| Training | | | |
| Recommended training:   * PY200 Payroll Overview * PY300 Payroll Administration | | | |
|  | | | |
| Payroll Administrator |  | | |
| Overview This role allows the user to maintain payroll master data for employee records, including deductions and earnings wage types. This role also acts as a liaison between agency employees and BEST Shared Services. | | |  |
| Tasks/Responsibilities | | | |
| * Adjusts payroll for use of State vehicles. * Collect overpayments from non-active employees. * Communicate with employees regarding payroll issues. * Enter cell phone supplement data for cell phone reimbursement. * Forward off-cycle check replacement documentation to BEST Shared Services. * Process agency-specific deductions. * Review payroll-related reports and time data reports. * Submit off-cycle adjustment documentation to BEST Shared Services. | | | |
| Related Processes | | | |
| * Paying the National Guard * Payroll Processing / Deductions Processing * Off Cycle Processes * Agency-Specific Deductions & Supplements * Relocation Pay * Review and Resolve Time Related Issues * Process Dual Employment | | | |
| Role Conflicts | | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * HR Master Data Maintainer   If either or both roles are required for work, please fill out and submit [SOD form](#_Segregation_of_Duties) | | | |
| Role Dependencies | | | |
| Those assigned this role will also be assigned the following roles:   * Display Payroll * Display Benefits * Display Time * Display Non-Sensitive HR * Payroll BOBJ Reports  |  |  | | --- | --- | | Payroll Administrator (continued) |  |  Training Required training:   * PY200 Payroll Overview * PY300 Payroll Administration | | | |
|  | | | |

# Personnel Administration

|  |  |  |  |
| --- | --- | --- | --- |
| |  |  | | --- | --- | | Display Non-Sensitive HR |  |  Overview |  |
| This role allows the user to display and report on non-sensitive employee data, including organization assignment, work address/phone, and anniversary date. | |
| Tasks/Responsibilities | |
| * View and generate compliance reports. * View and generate reports on agency employee list. * View and generate reports on default pay scales. * View and generate reports on employee length of service and service anniversary date. * View and generate reports on employee organizational assignment. * View and generate reports on organizational statistics. * View employee certifications and licenses. * View employee telephone numbers and email. | |
| Related Processes | |
| * Personnel Administration Actions | |
| Role Conflicts | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | |
| Role Dependencies | |
| Those assigned this role will also be assigned the following roles:   * N/A | |
| Training | |
| Recommended training:   * PA210 PA Terms, Concepts and Display Data | |

|  |  |  |
| --- | --- | --- |
| Display HR Director |  | |
| Overview The Display HR Director role can display and generate reports on HR data associated with personnel administration actions. The Display HR Director role also allows for viewing and report generation of sensitive employee data, including age, gender, ethnicity, years of service, salary, pay grade, disability, performance ratings, and employee competency levels. This role is designed for agency HR Directors (and associated pertinent staff) only. | |  |
|  | | |
| Tasks/Responsibilities | | |
| * View and generate reports on HR data associated with personnel administration actions. * View and generate reports on sensitive employee data, including age, gender and ethnicity. * View and generate reports on such employment data as employee years of service, salary, pay grade, disability, performance ratings and competency levels. | | |
| Related Processes | | |
| * Personnel Administration Actions | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * Display EEO * Display Time * Display Benefits * Display Organization Management * Display Non-Sensitive HR * HR Display BOBJ Reports | | |
| |  |  | | --- | --- | | Display HR Director (continued) |  |  Training | | |
| Recommended training:   * PA210 PA Terms, Concepts and Display Data | | |

|  |  |  |
| --- | --- | --- |
| Display Performance Ratings |  | |
| Overview This role allows the user to display and generate reports on employee performance ratings in SAP. | |  |
| Tasks/Responsibilities | | |
| * View and generate reports on employee performance rating information. | | |
| Related Processes | | |
| * Personnel Administration Actions | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * Performance Display BOBJ reports | | |
| Training | | |
| Recommended training:   * PA210 PA Terms, Concepts and Display Data | | |

|  |  |  |
| --- | --- | --- |
| Display Salary & Pay Grade |  | |
| Overview This role allows the user to display and generate reports on employee salary and pay grade information. | |  |
|  | | |
| Tasks/Responsibilities | | |
| * View and generate reports on employee salary and pay grade information. | | |
| Related Processes | | |
| * Personnel Administration Actions | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * N/A | | |
| Training | | |
| Recommended training:   * PA210 PA Terms, Concepts and Display Data | | |

|  |  |  |
| --- | --- | --- |
| Display EEO | |  |
| Overview | | |
| This role allows the user to display and generate reports on disability information, as well as on age, gender, ethnicity, and years of service. This role is designed for agency EEO officers. | | |
| Tasks/Responsibilities |  | |
| * View and generate reports on EEO information. | | |
| Related Processes | | |
| * Personnel Administration Actions | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * EEO BOBJ Reports | | |
| Training | | |
| Recommended training:   * PA210 PA Terms, Concepts and Display Data | | |
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|  | | |

|  |  |
| --- | --- |
| Grievance Maintainer |  |
|  | |
| Overview This role allows the user to maintain grievances on employee master records. | |
| Tasks/Responsibilities | |
| * Create a record if a grievance. * Maintain grievances on master records. * Monitor grievance timeframes and process. * View and generate reports on grievance information. | |
| Related Processes | |
| * Personnel Administration Actions | |
| Role Conflicts | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | |
| Role Dependencies | |
| Those assigned this role will also be assigned the following roles:   * Display Non-Sensitive HR * Display Grievances * Grievance BOBJ Reports | |
| Training | |
| Required training:   * PA210 PA Terms, Concepts and Display Data * PA321 Create and Maintain Grievances Data | |

|  |  |
| --- | --- |
| Display Grievances |  |
| Overview The Display Grievances role is responsible for displaying and generating reports on employee grievance information in SAP. Task and Responsibilities | |
| * View and generate reports on employee grievance information. | |
| Related Processes | |
| * Personnel Administration Actions | |
| Role Conflicts | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | |
| Role Dependencies | |
| Those assigned this role will also be assigned the following roles:   * Grievance BOBJ Reports | |
| Training | |
| Recommended training:   * PA210 PA Terms, Concepts and Display Data | |

|  |  |
| --- | --- |
| HR Master Data Approver (Training Required) |  |
| Overview This role allows the user to approve HR Master Data Maintainer actions pertaining to employees including hiring, separating, promoting, demoting, or reassignment information for employees. This role also approves reallocation, transfer, work against, longevity pay, leave of absence, and return from leave of absence information.  \*Note: Holders of this role cannot maintain his or her own information using the transactions associated with this role; ESS must be used. | |
| Tasks/Responsibilities | |
| * Approve an employee’s appointment change within an agency. * Approve career progressions. * Approve data associated with personnel administration actions. * Approve demotion action. * Approve employee separation action (including retirement). * Approve investigatory leave w/ pay. * Approve leave of absence action (including workers compensation). * Approve new hire / promotion / reinstatement/ suspension and transfer actions. * Approve salary adjustments. | |
| Related Processes | |
| * Personnel Administration Actions * Process Dual Employment | |
| Role Conflicts | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * HR Master Data Maintainer * Agency Position Funding Approver   If either or both roles are required for work, please fill out and submit [SOD form](#_Segregation_of_Duties) | |
| HR Master Data Approver (continued) |  |
| Role Dependencies | |
| Those assigned this role will also be assigned the following roles:   * Display Non-Sensitive HR * Display Benefits Display Time * Display Salary & Pay Grade * Display Organization Management * PA BOBJ Reports | |
| Training | |
| Required training:   * PA210 PA Terms, Concepts and Display Data * WF220 SAP Workflow for Approvers | |

|  |  |
| --- | --- |
| HR Master Data Maintainer (Training Required) |  |
| Overview This role allows the user to maintain employee master data and perform employee actions including hiring, separating, promoting, demoting, or reassignment information for employees. This role also maintains reallocation, transfer, work against, longevity pay, leave of absence, and return from leave of absence information within SAP. |  |
| Tasks/Responsibilities | |
| * Change an employee’s appointment within an agency. * Maintain data associated with personnel administration actions. * Maintain dates for service calculations. * Perform demotion action. * Perform employee separation action (including retirement). * Perform leave of absence action (including workers compensation). * Perform new hire / promotion / reinstatement/ suspension and transfer actions. * Perform salary adjustments. * Record career progression. * Record investigatory leave with pay. | |
| Related Processes | |
| * Personnel Administration Actions * Process Dual Employment | |
| Role Conflicts | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * HR Master Data Approver * Agency Position Funding Approver * Payroll Administration | |

If any of these roles are required for work, please fill out and submit [SOD form](#_Segregation_of_Duties)

|  |  |  |
| --- | --- | --- |
| |  |  | | --- | --- | | HR Master Data Maintainer (continued) |  |  Role Dependencies |
| Those assigned this role will also be assigned the following roles:   * Display Non-Sensitive HR * Display Benefits * Display Time * Display Salary & Pay Grade * Display Organization Management * Workflow role: (AA1/DA1 not assigned) * PA Reports BOBJ |
| Training |
| Required training:   * PA309 Introduction to Create and Maintain Employee Data * PA210 PA Terms, Concepts and Display Data * PA310 Create and Maintain Employee Data * PA313 Modifying Position/Employee Data and Reporting   Recommended training:   * PA420 Leave of Absence * PA370 Short-Term Disability |

|  |  |  |
| --- | --- | --- |
| Short-Term Disability Specialist |  | |
| Overview | | |
| This role is for the user who receives the appropriate documentation from employees requesting short-term disability. This role also allows users to process an employee’s short-term disability request and determine the appropriate leave action. | | . |
|  | |  |
| Tasks/Responsibilities | | |
| * Determine eligibility for employee. * Determine leave options. * Enter time for employees on short-term disability. * Place employee on short-term disability status. * Review employee benefit plans. * Review employee documentation. * Review employee payroll deductions and salary. | | |
| Related Processes | | |
| * Personnel Administration Actions | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * FMLA Event Maintainer * Leave Administrator * Time Administrator * Display Benefits * Display Payroll * Display Time * Time Admin /FMLA BOBJ Reports | | |
| |  |  | | --- | --- | | Short-Term Disability Specialist (continued) |  |  Training | | |
| Required training:   * TM300 Time Administration * TM310 Leave Administration * PA210 PA Terms, Concepts and Display Data * PA370 Short Term Disability | | |

|  |  |  |
| --- | --- | --- |
| Warnings Maintainer |  | |
| Overview This role allows the user to maintain warnings on the employee record in SAP. | |  |
|  | | |
| Tasks/Responsibilities | | |
| * Create a record of a warning. * Maintain warnings on master records. * View and generate reports on employee warnings information. | | |
| Related Processes | | |
| * Personnel Administration Actions | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * Display Non-Sensitive HR * Display Warnings * Warnings BOBJ Reports | | |
| Training | | |
| Required training:   * PA210 PA Terms, Concepts and Display Data * PA322 Create and Maintain Disciplinary Actions | | |

|  |  |  |
| --- | --- | --- |
| Display Warnings |  | |
| Overview This role allows the user to display and generate reports on employee warnings in SAP. | |  |
|  | | |
| Tasks/Responsibilities | | |
| * View and generate reports on employee warnings information Related Processes. * Personnel Administration Actions. | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * Warnings BOBJ Reports | | |
| Training | | |
| Recommended training:   * PA210 PA Terms, Concepts and Display Data | | |

# Time Administration

|  |  |  |
| --- | --- | --- |
| Charge Object Maintainer |  | |
| Overview This role allows the user to create and manage agency-specific charge objects that are available for employees to charge their time to within their agencies | | . |
|  | | |
| Tasks/Responsibilities | | |
| * Assign charge codes. * Create charge codes. | | |
| Related Processes | | |
| * N/A | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * N/A | | |
| Training | | |
| Required training:   * TM200 Time Management Overview * TM330 Charge Object Maintainer | | |

|  |  |  |
| --- | --- | --- |
| Display Time |  | |
| Overview This role allows the user to display time entered, leave, vacation, work schedules for employees. | |  |
| Tasks/Responsibilities | | |
| * View absence and attendance quotas and reports. * View employee organizational assignments. * View FMLA events. * View payroll status. * View planned working time. * View quota compensation information. * View schedule information. * View substitutions. * View time accounts / approvals / reports /statements / timesheets. | | |
| Related Processes | | |
| * Management Processes | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * N/A | | |
| Training | | |
| Recommended training:   * TM200 Time Management Overview * TM220 Introduction to Time Management * TM300 Time Administration | | |

|  |  |  |
| --- | --- | --- |
| FMLA Event Maintainer |  | |
| This role establishes and maintains Family Medical Leave Act (FMLA) reasons. Also, generates FMLA records that are used by the Leave Administrator to assign FMLA and Family Illness Leave (FIL) reasons. | |  |
|  | | |
| Tasks/Responsibilities | | |
| * Create FMLA events. * Generate FMLA event records. | | |
| Related Processes | | |
| * N/A | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * Time Admin BOBJ Reports | | |
| Training | | |
| Required training:   * TM200 Time Management Overview * TM210 Leave Administration * TM310 Leave Administration | | |

|  |  |  |
| --- | --- | --- |
| Leave Administration |  | |
| This role allows the user to manage employee leave balances. This role can adjust absence quotas for “Advanced Sick Leave” and “Advanced Vacation Time”. It also manages Family Medical Leave Act (FMLA), Family Illness Leave (FIL), and shared leave programs. This role can also create manual adjustments to leave balances as required. | |  |
|  | | |
| Tasks/Responsibilities | | |
| * Administer leave donations. * Assign absences to FMLA/FIL reason. * Associate an employee’s absences with FMLA or FIL. * Create “Advanced Sick Leave” or “Advance Vacation Leave” quotas for employee’s use. * Determine eligibility for employees requesting leave (FMLA, FIL, VSL). * Review leave balances and make manual adjustments if discrepancy exists. | | |
| Related Processes | | |
| * Process FMLA or FIL Request or FIL Absences * Process Participation in Shared Leave (Donor/Recipient) * Management Processes * Leave Processes and Balances * Review and Resolve Time Related Issues | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * Display Time * FMLA Time BOBJ Reports | | |
| |  |  |  |  | | --- | --- | --- | --- | | |  |  | | --- | --- | | Leave Administration (continued) |  | |  |  Training | | |
| Required training:   * TM200 Time Management Overview * TM210 Leave Administration * TM310 Leave Administration | | |

|  |  |
| --- | --- |
| Time Administrator (Training Required) |  |
| Overview This role allows the user to enter time for employees without Employee Self Service (ESS), review time evaluation results, request configuration changes regarding SAP, and support the management of substitutions and on-calls. This role also can make corrections on timesheets that have already been approved. |  |
|  | |
| Tasks/Responsibilities | |
| * Edit/correct time and distribution information. * Enter time and distribution for those without ESS. * Generate a schedule change request. * Identifies time processing errors. * Provide time statements and reports to employees without ESS access. * Request changes to cross application timesheets. | |
| Related Processes | |
| * Time entry | |
| Role Conflicts | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | |
| Role Dependencies | |
| Those assigned this role will also be assigned the following roles:   * Display Time * FMLA Time BOBJ Reports | |
| Training | |
| Required training:   * TM200 Time Management Overview * TM220 Time Administration Overview * TM300 Time Administration | |

|  |  |  |
| --- | --- | --- |
| Time Approver |  | |
| Overview This role allows the user to approve time for “unapproved” Employee Self-Service (ESS) time entry; in the absence of an agency supervisor/manager approving time in Manager Self-Service (MSS) to meet payroll deadline. The Time Approver role serves as a back-up for ESS time approved by designated agency managers/supervisors in MSS.  \*Note: Non-ESS using agencies will not need to assign the Time Approver role. | |  |
|  | | |
| Tasks/Responsibilities | | |
| * Generate time reports. * Review and approve time for employees entering time in ESS. | | |
| Related Processes | | |
| * Time entry | | |
| Role Conflicts | | |
| Those assigned this role should *not* be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:   * N/A | | |
| Role Dependencies | | |
| Those assigned this role will also be assigned the following roles:   * Display Time * Time Admin BOBJ Reports | | |
| Training | | |
| Required training:   * N/A   Recommended training:   * N/A | | |

# Segregation of Duties (SOD)

## Defining Segregation of Duties (SOD)

Segregation of Duties is one of the key concepts of internal control and provides an appropriate level of checks and balances upon individuals performing related overlapping job functions. G.S. §143D-6 authorizes the State Controller to establish comprehensive standards, policies, and procedures to ensure a strong and effective system of internal control within State government. Pursuant to G.S. §143D-7, the management of each State agency is responsible for establishing and maintaining a proper system of internal control within his/her agency. While the Office of the State Controller strongly encourages agency management to ensure appropriate segregation of related job functions, we realize that there may be instances in which the size of the organization and limited staffing levels may make segregation of duties impractical or cost prohibitive. This internal control deviation must, however, be the exception and not be the norm.

The head of the agency, or designee, has the authority to manage segregation of duty conflicts. Authorization to deviate shall be based upon the business risk versus the cost associated with implementing the desired control. Where possible, agencies are encouraged to design compensating controls into their business processes. While not a substitute for a primary control such as proper segregation of duties, a compensating control can mitigate an organization’s business risk – thereby making a primary control deficiency more tolerable.

* When a SOD conflict arises, a SOD Risk Acceptance Form will need to be completed and signed by the Agency Head. This form is filed in the SOD Folder under the Security Team directory.
* The SOD signoff is for the Position, not the employee.
* This means that the SOD signoff is for the Position, and will not follow the employee if the employee goes to another position
* (Position Based Security)

## SOD (Separation of Duties) Risk Acceptance Form

|  |  |
| --- | --- |
| Employee Name |  |
| Position # |  |
| Position Name |  |
| PERNR # (include leading zeros) |  |
| Agency |  |

This form is required to document that there is an actual business need for the following user to have two or more SAP security roles that cause a SOD (Segregation of Duties) conflict as marked below.

|  |  |  |
| --- | --- | --- |
| Role Conflict(s) | Code | Mark SOD Conflict |
| HR Master Data Maintainer with Payroll Administrator | 01 |  |
| HR Master Data Approver with HR Master Data Maintainer | 02 |  |
| HR Master Data Approver with Position Funding Approver | 03 |  |
| HR Master Data Maintainer with Position Funding Approver | 04 |  |

Completion of this form indicates that you, as the agency approver, understand the risks associated with the above marked SOD conflicts. and that your agency has established and documented a compensating control process within your agency’s business processes.

Approver’s Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Approver’s Printed Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SOD Risk Acceptance Form Procedures:

* Please submit one form per employee.
* Send to [BEST@osc.nc.gov](mailto:BEST@osc.nc.gov). Please do not send directly to the HR/Payroll ERP System Security Team.
* Save the form using the following naming convention:

SOD\_ [first initial] \_ [last name] \_[agency]\_[date]. Example: SOD\_j\_doe\_osc\_070109.xls

* Removal of one or more of the SOD roles can be accomplished by having the Agency Data Owner submit a completed online SAP Security Role Change Form
* Note: During the regular Security Request Process, the HR/Payroll ERP System will perform a SOD Analysis for the user for whom the request pertains, and will inform the Data Owner, before the request is submitted, if a SOD conflict exists. The role will be flagged with code H or W. This flag will be removed once a signed SOD form is submitted and processed by the Security Team.

Segregation of Duties: Role Conflicts

* [HR Master Data Maintainer](#_HR_Master_Data) with [Payroll Administrator](#_Payroll_Administrator)
* [HR Master Data Approver](#_HR_Master_Data_1) with [HR Master Data Maintainer](#_HR_Master_Data)
* [HR Master Data Approver](#_HR_Master_Data_1) with [Position Funding Approver](#_Agency_Position_Funding)
* [HR Master Data Maintainer](#_HR_Master_Data) with [Position Funding Approver](#_Agency_Position_Funding)

# Security Role Assignment Report -ZSECROLE

## **ZSECROLE: Overview**

This report can be used to review the security roles and Workflow relationships related to Positions. The report will also indicate what person(s) hold the position or if it is vacant, what Personnel Area the person(s) is/are in, and the top org unit that a role provides access to. The report also provides a more user-friendly description for each role.

Scenarios that this report would be useful for include:

* Reviewing the roles and/or Workflow relationships assigned to a specific position(s).
* Reviewing the roles and/or Workflow relationships assigned to any position in an org unit(s).
* Identifying the positions in an org unit(s) who have a specific role(s).
* Identifying the positions in an org unit(s) who have a specific combination of roles.

### ZSECROLE: Initial Screen

Graphical user interface, application

Description automatically generated

### ZSECROLE: Selection screen input options

* Effective Date: The program will only return records which have a validity date range that includes the Effective Date specified. This field defaults to the current date.
* Positions: One or more Positions can be specified. If a Position is specified, you cannot specify an Org Unit. You must specify at least one Position or one Org Unit to run the report.
* Org Unit: One or more Org Units can be specified. If an Org Unit is specified, you cannot specify a Position. Roles assigned to the Positions in these Org Units on the Effective Date will be included in the report results. You must specify at least one Position or one Org Unit to run the report.
* Checkbox “Include subordinate org units”: If this box is checked the program will include all Positions in the Org Units that report to the Org Units specified.
* Checkbox “Show Recursive Org Units”: If this box is checked the program will include all recursive Org Units.
* Roles: If one or more Role names are specified, the program will only display results for those Roles.
* Checkbox “Match ALL roles specified”: If this box is checked, the program will only display results for those Positions which have ALL the Roles that have been specified.
* Checkbox “Include WorkFlow relationships”: If this box is checked, only OM/PA Approver WorkFlow relationships on the Positions specified will be included in the results.

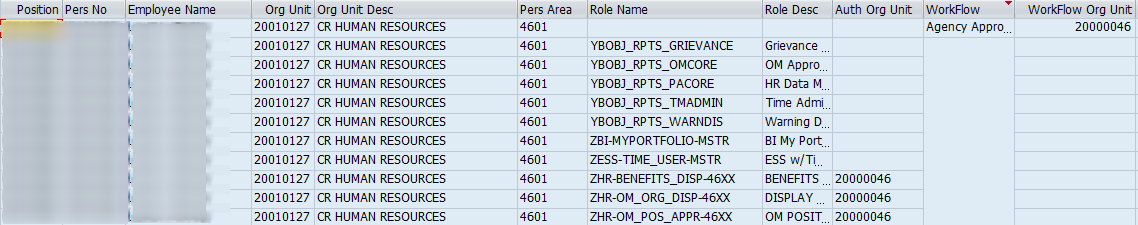
There is a selection variant button on the initial screen.  Combinations of selection criteria can be saved and easily reused by defining selection variants.

There is an Information Help button on the initial screen.  Clicking this button will bring up a window containing a brief description of each of the input fields.

ZSECROLE: Executing the report

1. Enter the appropriate selection criteria values.
2. Click the Execute button. 
3. Review the results.

ZSECROLE: Result screen



### 

### ZSECROLE: Report Result Details

Each Role assignment record or Workflow relationship record found will be represented with a separate row in the report results.

Positions with multiple Holders will be represented with a separate row in the results for each Role for each Holder.

* Position: This column contains the Position number.
* Pers No: This column contains the Personnel Number of the Holder of a Position. If no Holder exists, the word VACANT will be in the column.
* Employee Name: This column contains the name of the Holder of a Position. If no Holder exists, the word VACANT will be in the column.
* Org Unit: This column contains the Org Unit that the Position belongs to.
* Org Unit Desc: This column contains the Description of the Org Unit the Position belongs to.
* Pers Area: This column contains the Pers Area that the Holder of the Position belongs to. If the Position is vacant, this column will be empty.
* Role Name: This column contains the technical Role Name. This column will be empty for rows showing Workflow relationships.
* Role Desc: This column contains the Description of the Role. This column will be empty for rows showing Workflow relationships.
* Auth Org Unit: This column contains the highest org unit that the role has authorization for. The user will also have authorization for all org units under that one in the org unit hierarchy. This column will be empty for BOBJ and Portal role assignments, as they themselves do not contain the authorization setting. This column will be empty for rows showing Workflow relationships.
* Role Start: This column contains the Start Date of the role assignment or Workflow relationship record.
* Role End: This column contains the end Date of the role assignment or Workflow relationship record.
* Workflow: This column contains the short text of the Workflow relationship record. This column will be empty for role assignment records.
* Workflow Org Unit: This column contains the org unit associated with the Workflow relationship record. This column will be empty for role assignment records.

### Background Execution of ZSECROLE:

1. Type transaction ZSECROLE
2. Type in your selection criteria. Example below

Graphical user interface, application

Description automatically generated

1. Select the F9 Key OR Select *Program* and in the drop-down menu select (*Execute in Background*).

### Security Role Assignment Report Tips:

TIP: You can use the Filter button  to hide common roles or certain types of roles in the results. For example, you can hide BI roles by excluding roles that begin with “ZBI”.

TIP: You can view the results in Excel within SAP using the  button, or you can export the results to a file for import into Excel or other applications using the  button.

TIP: Using the  button, you can change the column layout and save it as a layout variant.

TIP: The help button  will bring up a pop-up button containing help information about the fields on the report.

# Security Change Request Procedures with Roles Requiring Training

# Security Change Request

1. Agency Data Owner creates Security Request using SAP transaction ZSCRA or in the Integrated HR/Payroll System (SAP).
2. Transaction links to LMS and the class is assigned to the employee’s transcript if training is required.
3. The Integrated HR/Payroll System Security Request, generates an email to securityrequestsap@osc.nc.gov

Email includes:

Security Role Change Request Number (Subject Line)

Submitted by: XXXXXXXX Data Owners Name

Personnel Area: XXXX

For Employee: XXXXXXXX Employee Name

Example:

From: John Doe [mailto:John.Doe@ncdtst.gov]

Sent: Thursday, October 26, 2017 2:25 PM

To: SVC\_OSC.securityrequestsap <securityrequestsap@osc.nc.gov>

Subject: Security Role Change Request - 11021716

Submitted by 01234567 John Smith Doe

Personnel Area: 2101

For Employee: 07654321 Janey Doe

E-mail correspondence to and from this address may be subject to the North Carolina Public Records Law and may be disclosed to third parties.

1. BEST Call Center is responsible for processing the email, creating ticket, and assigning to Functional Security Support.
2. If all required classes are completed, the Security Request status will be “I” for “In Progress”, this is confirmed by the “Security Request System”.
3. If class is completed, the role(s) are assigned, the transaction status is completed, and the ticket is closed.
4. If ALL classes are not completed, the Security Request status is entered as ‘Pending’ (for pending class completion) and the ticket is closed. \*Non-training required roles will be assigned.
5. Once the class is completed and in a “Pass” status, LMS feeds over to the Integrated HR/Payroll System the Security Request System processes this information, updating any “Pending” requests, to “In Progress”.
6. The Integrated HR/Payroll System generates an email from [BATCHSEC@OSC.NC.GOV](mailto:BATCHSEC@OSC.NC.GOV) and sends to securityrequestsap@osc.nc.gov.

Email includes:

Security Role Change Request Number (Subject Line)

Submitted by: XXXXXXXX Data Owners Name

Personnel Area: XXXX

For Employee: XXXXXXXX Employee Name

Example:

RE: Security Role Change Request - 11021716

-----Original Message-----

From: BATCHSEC [mailto:BATCHSEC@OSC.NC.GOV]

Sent: Friday, October 27, 2017 9:30 AM

To: SVC\_OSC.securityrequestsap <securityrequestsap@osc.nc.gov>

Subject: Security Role Change Request - 11021716

Submitted by: 01234567 John Smith Doe

Personnel Area: 2101

For Employee: 07654321 Janey Doe

Please do not reply to this E-mail.

E-mail correspondence to and from this address may be subject to the North Carolina Public Records Law and may be disclosed to third parties.

1. BEST Call Center is responsible for processing the email, creating a new HEAT ticket, and assigning to Functional Security Support Team.
2. Functional Security Support team assigns the requested role(s).
3. If all training is completed the ticket is closed.
   1. If additional roles require training, the ticket will remain open until LMS is updated. Once LMS is updated additional HEAT tickets will be created.

## Procedures for viewing the security change request:

1. Access transaction code ZSCRD – Security Role Change Display.

Graphical user interface, application

Description automatically generated

1. Click View Request icon  to activate the Request Number field.
2. Key the request number which is found in the HEAT ticket.

Graphical user interface, application

Description automatically generated

1. Click or press Enter to display the request information.

Graphical user interface, text, application, email

Description automatically generated

1. Click Continue to display Employee Information and Role Information.

Graphical user interface, application

Description automatically generated

## Copy Security Roles from Another Position

**Business Process Procedure Overview:**

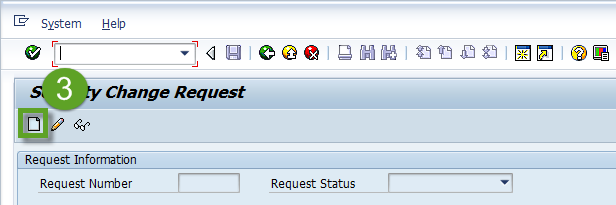
|  |
| --- |
| Security Change Requests are created by Agency Administrators and Data Owners, and submitted by Data Owners to the BEST Shared Services Security Team for processing. In additional to adding roles manually to a request, users may copy the Security roles from an existing Position into a request.  This is especially useful when requesting similar access for multiple employees.  NOTE: *Before beginning this process, know the Position number(s) whose roles you wish to copy. See the* [Security Role Assignment Report - ZSECROLE](#_ZSECROLE:__Report) *for more information about identifying the correct Position.* |

## Creating a Security Request

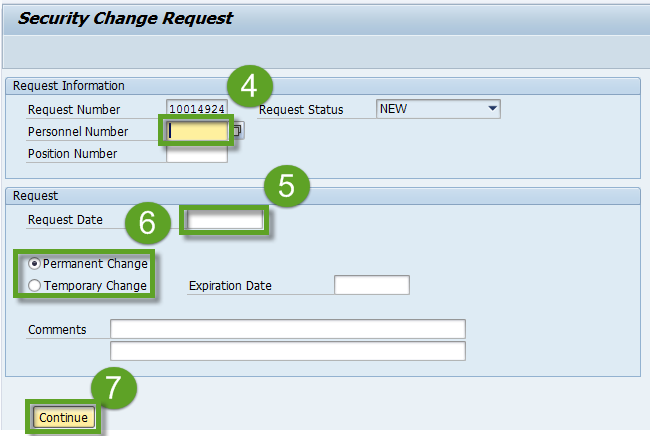
Graphical user interface, application

Description automatically generated

1. From the SAP Easy Access Screen, type **ZSCR** or **ZSCRA** in the Command Field.
2. Click **Enter** **.**
3. Click **Create** **.**



The Security Change Request screen will be displayed.



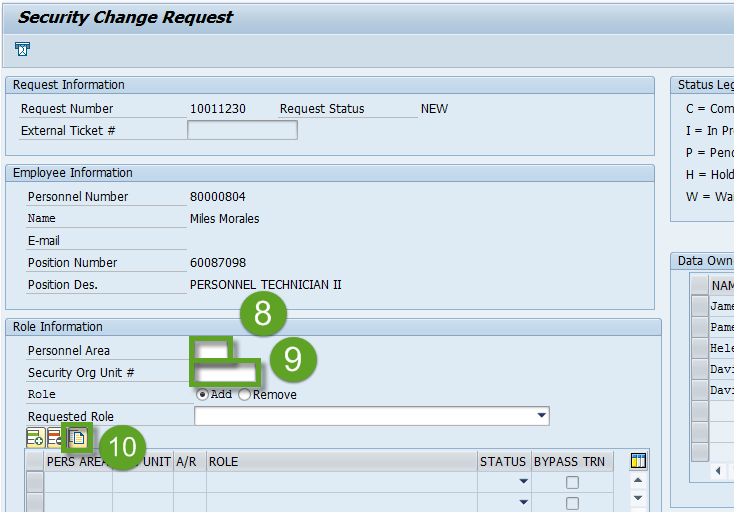
The system assigned Request Number will be displayed at the top of the page with the Request in **NEW** status.

1. Enter the employee’s Personnel Number.
2. Enter the Request Date.
3. Select **Permanent Change or Temporary (*requires an Expiration Date)*.**
4. Click **.**

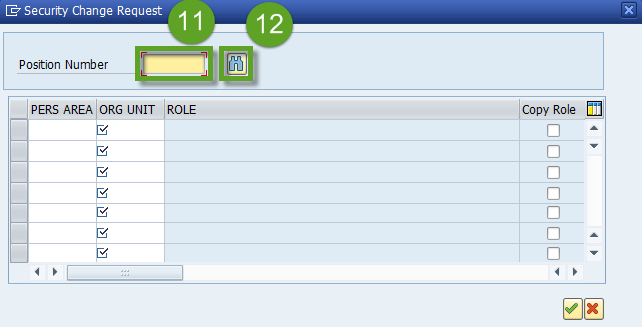
**The Security Request Screen will be displayed.**

\*\*NOTE\*\*

Add any Comments that would be helpful to the Security Administrator that processes the request.



1. Enter the Personnel Area.
2. Enter the top Org Unit for which the employee will be granted Security.
3. Click **Copy Roles from Position** **.**



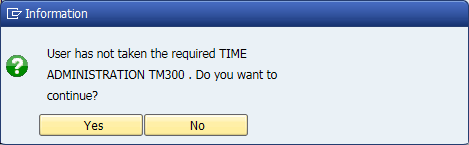
1. Enter the Position number whose roles you wish to copy.
2. Click **Find** **.**

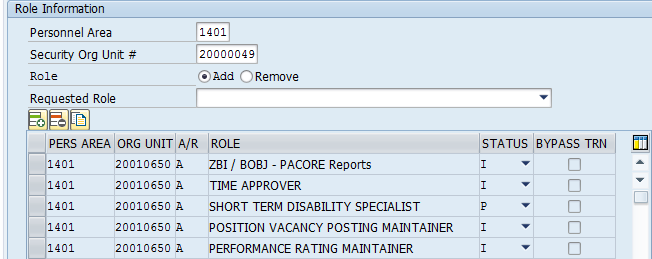


The Position’s current security roles will be displayed.

1. Review the **Personnel Area** and **Org Unit** columns. Roles may be individually customized to change the Personnel Area and Top Security Org to which access is granted.
2. Review the **Copy Role** column. If a role is unchecked it will not be added to the request.
3. **Click the Green Check** **.**

**If any of the Position’s roles require Training, or an SOD Risk Acceptance Form, the appropriate warning messages will be displayed in order.**

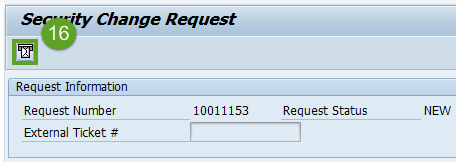




The Position’s Security Roles will then be added to the request.

NOTE: *You may repeat this process if you wish to add roles from Multiple Positions.*

Once all the desired Security Roles have been entered, and if you are a Data Owner (ZSCRA):

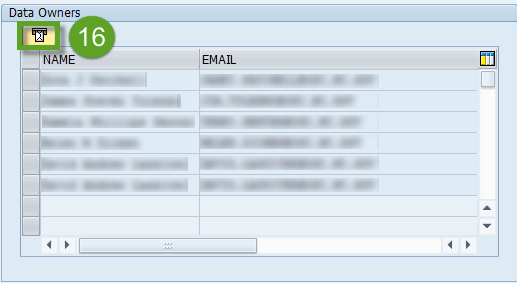


1. (a) Click the Send Request button to submit the request to BEST Shared Services.

The Status of the Request will change to **IN PROGRESS.**

**OR**

If you are not a Data Owner (ZSCR):



(b) Select the Data Owner you wish to email and click the Send Message button.

The system will then generate an email to the Data Owner, who can submit the request to BEST.

## **Managing Mass Change – Proces**s:

1. Agency Data Owner will need to contact Security Team
   * [thurman.ross@osc.nc.gov](mailto:thurman.ross@osc.nc.gov)
   * [todd.wall@osc.nc.gov](mailto:todd.wall@osc.nc.gov)
   * [daniel.rocker@osc.nc.gov](mailto:daniel.rocker@osc.nc.gov)
   * brad.johnson@osc.nc.gov

Agency Data Owner will need to provide:

* + Type of change
  + Number of Positions affected
  + Roles affected

1. Security Team will review the request and may request additional information from agency.
2. Once the Security Team reviews the request (3 days max), an email will be sent back to the requesting agency:

* Approving the request. (BSS, PMO will be copied on the email)
* Rejecting the request. (PMO team will be copied)
* Security team will forward the request to the PMO team for further analysis.

1. If approved, the Data Owner will submit request via Heat Ticket Process.

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## Exceptions to Normal Role Assignment Process

* The following are exceptions:
  + BOBJ Reports
    - Requests can be made for only BOBJ Groups, not an individual report.
      * When assigned to a BOBJ Group, the employee has access to the highest structure (Org unit) that is currently assigned to the position
  + FI Report (ERP Report. Not BI Report)
    - Finance – Inquiry by Cost area
  + Cross Agency Verification Report
    - Not tied to a specific ERP Role
  + [HR Role Exception Request](#_Copy_Of_HR) (when role is “Pending Class”)
    - Temporary assignment of role(s) for 45 days
    - Must be a true business need!
    - Needs approval by Director of BEST Shared Services

# Appendix

## **ERP Role Assign Matrix**



## BOBJ Report Description and Matrix



## Key ERP Roles and Infotype Chart



## Copy Of SOD Form



## Process Flow



## Copy Of HR Exception Request Form

