# CREATE A NEW POSITION (ACTION 100)

**Change Record:**

| Change Date: 12.10.2012 | Changed by:  d. lyle |
|---|---|
| Changes: | New **NOTE** after Tips and Tricks section<br>• *Once a position number has been created, the start date may not be changed.  Therefore, it is important to work with Budget and establish the effective date of the new position BEFORE creating a PCR.*<br><br>Step 7:  Par 3<br>• Added the new last sentence:<br>*You may change any field except the date.*<br><br>• Last paragraph deleted:<br>*Once a position request has been submitted to Workflow (it has received a PCR number and has been submitted to Workflow), it may not be changed until the PCR number has gone through the entire Workflow approval process and either successfully been approved, rejected, or cancelled.*<br><br>Step 10:<br>• Added the description for SOC Code:<br>*Standard Occupational Code*<br><br>Step 11:<br>• Changed text in 1st par. after screen capture:<br>The State of North Carolina uses two company codes:  **NC01** & **NC02**. All agencies use NC01, except for the Department of Transportation and the *DES and DWS Divisions in Department of Commerce*. The data will change depending on the Agency and specific position being created.<br><br>Step 18:<br>• Changed text in last par.  Added EE directory and E-Recruit tie-in statement.<br>*Address information is not required to save a position; however, best practice is to include it before initiating workflow.  The mailing address is used in e-Recruit and the employee directory.* |

**Trigger:**

A new position is needed.

**Business Process Procedure Overview:**

All new position requests are submitted via the OM Workflow, transaction code ZOMA069, Action 100 to create a new position.  The workflow process follows the appropriate approval process, which may include some or all of the following: Division Approval, Funding Approval, OSBM Approval, and OSP Approval.

**Tips and Tricks:**

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

| | |
|---|---|
| **Information** | **NOTE:**  Once a position number has been created, the start date may not be changed.  Therefore, it is important to work with Budget and establish the effective date of the new position BEFORE creating a PCR. |

**Access Transaction:**

| | |
|---|---|
| **Via Menu Path:** | Your menu path may contain this custom transaction code depending on your security roles. |
| **Via Transaction Code:** | ZOMA069 |

## PROCEDURE
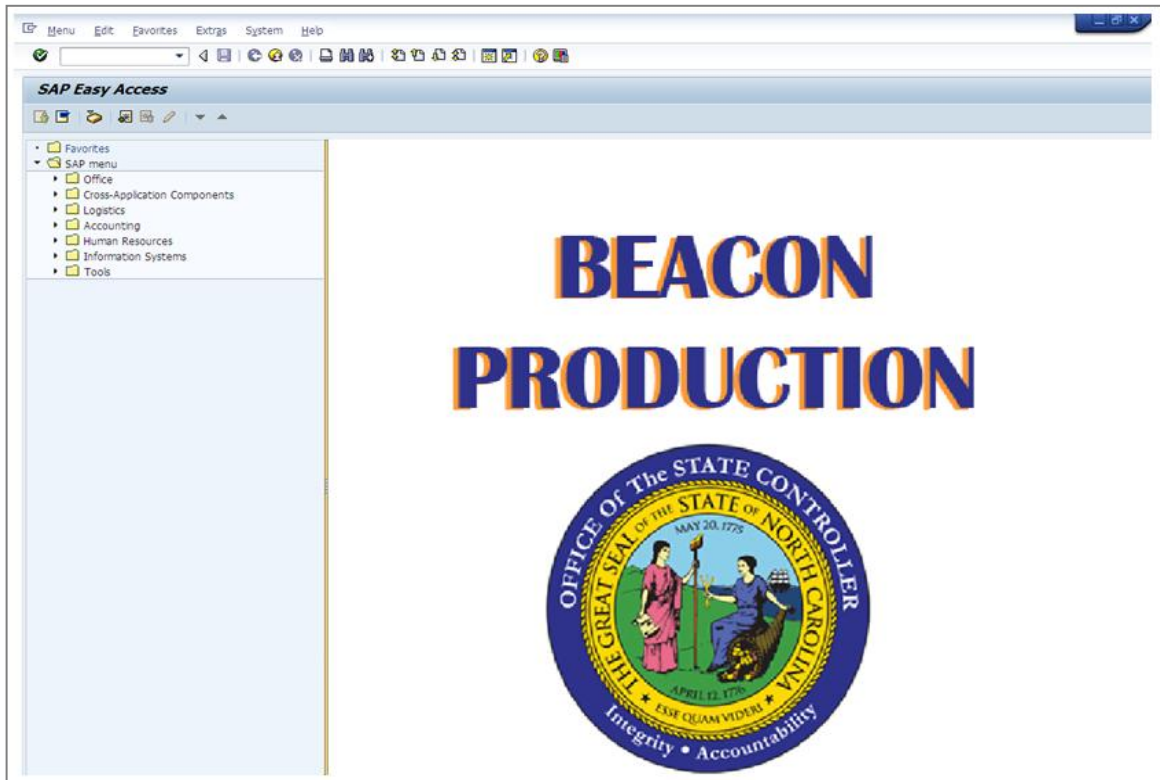


1.  Update the following field:

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

2.  Click the **Enter** button.

| | |
|---|---|
| **Information** | You may want to enter this transaction code in your Favorites folder. <br> • Choose **Favorites > Insert Favorites** <br> • Type in **ZOMA069**. <br> • Click **Enter**. <br> To see the transaction code displayed in front of the link in your favorites: <br> • Choose **Edit > Settings**. <br> • Place a **check** next to Display Technical Name. <br> • Click **Enter**. |

3. Update the following field:

| Field Name | Description | Values |
|---|---|---|
| Action | A one to four character code that represents an action. An action is a series of procedures that must be completed in order to achieve a specific objective. | Enter value in Action. <br><br>**Example**: 100 |

4. Click the **Enter** button.

   **NOTE:** The action number to create a new position is 100. Use the matchcode search for additional OM action options available from this transaction as appropriate.

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



5. Update the following fields:

| Field Name | Description | Values |
|---|---|---|
| Valid from | Beginning date of the specified date range. Also referred to as the effective date range. Identifies the lifespan assigned to an object or an infotype record, or the period of time that these items "exist". | Enter value in Valid from. <br><br>**Example**: 11/01/2011 |

6. Click the **Enter** button.

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

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

The end date should be 12/31/9999.

The Change button is used to change information on a request for a new position PRIOR submitting ir to Workflow. Once the action has been completed and it has been saved, a PCR (Position Change Request) number will be displayed. This PCR number does not mean the action has been submitted to Workflow. The action must still be submitted (Initiated) to Workflow. If the action has not been submitted to Workflow for approval, you may use the PCR number to make changes and save the latest action. You may change any field except the date.



8.  Update the following fields:

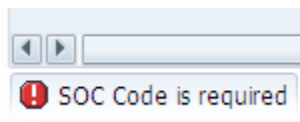| Field Name | Description | Values |
|---|---|---|
| Position abbr. | Name of the Position abbreviation. Position short text is a 12 character field. Not all 12 characters have to be used. Start each short text word with a capital letter and follow the naming conventions of your agency | Enter value in Position abbr. **Example**: BldgTech |

| | | |
|---|---|---|
| Position Name | Full description of Position Name, up to 40 characters long, followed by a dash, followed by the Job Group name | Enter value in Position name.<br><br>**Example**:  Building & Environmental Services Tech |
| Personnel area | Code identifying the agency and division associated with the position | Enter value in Personnel area.<br><br>**Example**:  4601 |
| Business Area | Code identifying the organizational unit for which balance sheets and income statements are prepared. Usually the agency. | Enter value in Business Area.<br><br>**Example**:  4600 |
| Pers subarea | Code that defines various working schedules so that Time Management can define groups of specific time entry rules.  Some examples include:<br>• NC01  7 day Norm<br><br>See the *Personnel Area and Subarea (PSA)* job aid that is available on OSC Training HELP website for detailed information concerning the relevant PSAs associated with each Personnel Area.  The job aid is located in the *OM > Job Aids* folder. | Enter value in Pers. subarea.<br><br>**Example**:  NC01 |
| Employee group | Drives benefits eligibility, leave and pay calculations | Enter value in Employee group.<br><br>**Example**:  SPA Employees |
| EE subgroup | Code identifying the employees is subject to FLSA overtime, pull/part time status, and other calculation rules | Enter value in EE subgroup.<br><br>**Example**:  B1 |
| Hours per week | Represents the budgeted number of hours per week for the position. In most cases the value will be 40 hours per week | Enter value in Hours per Week.<br><br>**Example**:  40 |
| County code | Contains the three-digit code for the county where the position is located | Enter value in County Code.<br><br>**Example**: 011 (Buncombe) |

| Position Types | • **Emergency** – A positions designated by an agency that is mandatory/essential to agency operations during adverse weather or other conditions of a serious nature that prohibit some employees from reporting to work but do not necessitate the closing of state offices and facilities; or a position designated that is mandatory/essential during emergency conditions that necessitate the closing of state offices or curtailing of operations. These designations are related only to the "Adverse Weather and Emergency Closing" policy in the State Personnel Manual.<br><br>• **Essential** – A position designated by an Executive Branch Department Head with the approval of the Office of State Budget and Management as exempt from an Executive Order prohibiting the filling of positions. Essential positions include positions directly related to law enforcement and public safety, classroom instruction, and the custody or care of persons for whom the state has a constitutional duty to serve. Administrative and support positions are not deemed essential, but the Office of State Budget and Management may designate additional positions as an Essential Position depending upon the circumstances of each request.<br><br>• **Key** – A position that requires specialized knowledge that is unique within the organization. The specialized knowledge is essential for the organization to meet the goals and objectives that are linked to its mission or statutory requirements. The loss of an employee in a key position would lead to immediate difficulties in getting the work accomplished. | Enter value in Position Types checkbox.<br><br>**Example**: None |
| --- | --- | --- |
| Org Unit | Contains the eight-digit number that represents the organizational unit the position belongs to | Enter value in Org Unit.<br><br>**Example**: 20010236 |

| Job | Eight digit code identifying the job. A job is a class and are general classifications of tasks routinely performed together | Enter value in Job.<br><br>**Example**: 30005055 |
|---|---|---|
| Reports to | Contains the eight-digit position number that represents the supervising (chief) position for the organizational unit | Enter value in Reports To.<br><br>**Example**: 60083644 |

9. Click the **Enter** button.

   A message displays in the Message Center at the bottom of the screen indicating that the SOC code is required for processing.



10. Update the following field:

| Field Name | Description | Values |
|---|---|---|
| SOC Code | Standard Occupational Code | Enter value in Position abbr.<br><br>**Example**: 372010 |

11. Click the **Enter** button to validate the text.

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

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

## Create New Position - CREATE

| General | Address | Time | Cost |

**Position**

Position
Valid from  11/01/2011  to  12/31/9999
Infotype status  2  Planned          Work Flow Status  ☐          PCR Number
Position abbr.  BldgTech     Position Name  Building & Environmental Services Tech
◉ Open  ○ Vacancy filled
Company Code  NC01  STATE OF NC          Personnel area  4601  Cultural Resources
Business Area  4600  Cultural Resources          Pers. subarea  NC01  7day Norm
Employee group  SPA Employees ▼          EE subgroup  B1  FT S-FLSAOT Perm
Hours per Week  40.00
SOC Code  372010  Building Cleaning Workers
County Code  011  Buncombe
Position Types:          None ✓  Emergency ☐  Essential ☐  Key  Non-Key Position ▼

**Position Relationships**

Org Unit  20010236  CR CDS A&H HIS RES Western Office
Job  30005055  Building & Environmental Technician
Reports To  60083644  Archives And History Regional Supervisor

| Pay Grade | Pay Scale |

**Salary structure data**

Ctry Grouping  USA          Pay grade  30005055
Pay grade type  02  Banded          Level  CB
Area  06  Career Banding          Key Date for Display  11/01/2011

Currency key  USD
Pay grade  22,067.00  To  35,980.00
Reference salary  0.00
Time unit  Annually

> **ℹ Information** Ensure you follow the naming convention when providing the short name and long name of the position to be created.

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

The State of North Carolina uses two company codes: **NC01 & NC02**. All agencies use NC01, except for the Department of Transportation and the DES and DWS Divisions in Department of Commerce. The data will change depending on the Agency and specific position being created.

Choose the appropriate Employee Group and Subgroup options for the type of position you are creating.
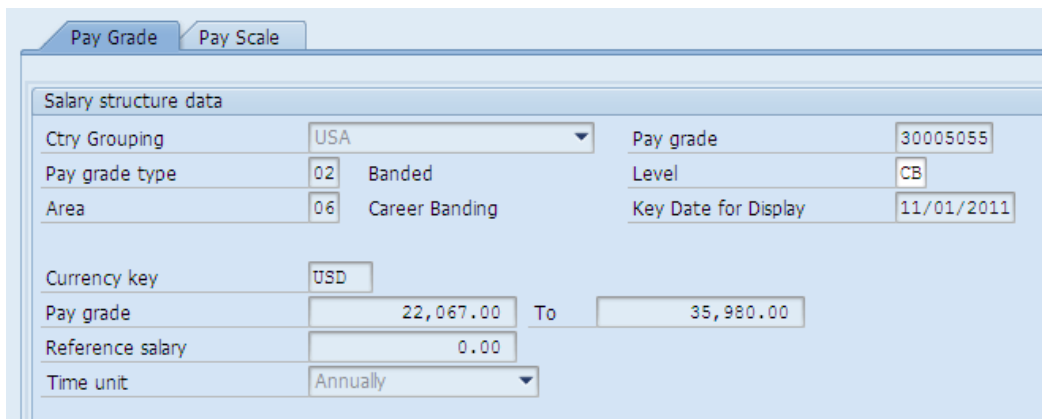
There are three separate designations for critical positions:

- **Emergency** - Positions which are required to work adverse weather or conditions of a serious nature that prohibit some employees from reporting to work.

- **Essential** - Positions which are exempt from an Executive Order prohibiting the filling of positions.

- **Key** - Positions designated by an agency that includes responsibility for performing mission critical work necessary for the organization to achieve its business goals.  A vacancy in a key position of over one week would have a negative impact on the delivery of services because of the criticality of the work.

   **NOTE**: A position can be designated with more than one type.  If no types are applicable, select None.

The Position Relationships are stored in the Relationship (IT1001) infotype.

Notice that, after clicking Enter in the previous step, the screen is validated and populated with additional data.  Scroll down the screen to view the Pay Scale and/or Pay Grade information based on the organizational data entered.



| CRITICAL! | If this position is a Banded position (part-time or full-time), an SOC code choice is required.  The system will not let you continue without entering an SOC code.  You may type in the code or choose from the drop-down in the SOC Code field. |
| --- | --- |
| | The SOC Code field will be grayed out until you have entered all other data and clicked Enter to validate the data - then the SOC Code field will open for entry if appropriate, or be populated automatically. |
| | If this position is a Graded position (part-time or full-time), the system will automatically populate the SOC code for you. |

12. Click the **Enter** button.

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

|  | Notice the Position number is provided at the top of the General tab on the screen.  This is the number for this position in the planned and active status.  This is a unique number, and if the position request is rejected or canceled, this position number will still be used for this request. |
| :---: | :--- |
| **Information** | Notice also that the PCR Number is also displayed.  This number and the actual date of the PCR are required for tracking this action. |
|  | In addition, the Initiate Work Flow button is now displayed. |

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

Once a position number has been assigned, BEST Shared Services can also view this position in the system.

14. Click the **Address**   tab button.

15. Select **Mailing Address** in the **Subtype** list box.

16. Update the following fields:

| Field Name | Description | Values |
| --- | --- | --- |
| House no/Street | The address street number and name.  Identifies the street name up to a maximum of 30 characters. | Enter value in House no/Street.<br><br>**Example**:  3514 Main St |
| PCode/City | Postal zip code and city | Enter value in PCode/City.<br><br>**Example**:  27609 |
| PCode/City | Postal zip code and city | Enter value in PCode/City.<br><br>**Example**:  Raleigh |
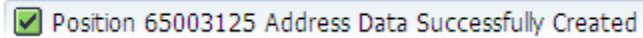
17. Click the **Enter**  button.

| | |
| --- | --- |
| ❌ <br> **CRITICAL**! | If adding additional addresses, do not save at this point.  Save only after all addresses on the Address tab have been entered. |

18. Click the **Save (Ctrl+S)** 🖫 button.

Notice the confirmation message at the bottom of the screen.  The same position number is used, but the system is notifying you that the additional data has been saved.

☑ Position 65003125 Address Data Successfully Created

A position can have one of each of the following types of addresses:

- courier (overnight mailing address)

- mailing

- main (physical)

Address information is not required to save a position; however, best practice is to include it before initiating workflow.  The mailing address is used in e-Recruit and the employee directory.

19. Click the **Time** [ Time ] tab button.

## Create New Position - CREATE

Initiate Work Flow

| General | Address | Time | Cost |

**Position**

| | | |
|---|---|---|
| Position | 65003125 | Building & Environmental Services Tech |
| Valid from | 11/01/2011 to 12/31/9999 | Infotype status 2 Planned |
| | | Work Flow status D Created |

**Overtime Compensation(9005)**

Immediate Payout ☐

OR

Comp Aging Limit ☐ Days

**Holiday Payout Period(9006)**

Immediate Payout ☐

OR

Comp Aging Limit ☐ Days

**Night Shift Premium(9007)**

Night Shift Prem Rate ☐ %

**Evening Shift Premium(9008)**

Evening Shift Prem Rate ☐ %

**Weekend Shift Premium(9009)**

Weekend Shift Prem Rate ☐ %

**Holiday Premium Rate(9010)**

Holiday Premium Rate ☐ %

**On-Call(9011)**

On-Call Comp Accrued ☐

On-Call Rate ¢ ☐

**Callback(9012)**

Callback Accrual ☐

**Extended Duty(9016)**

Extended Duty Rate ☐ %

**Gap Hours(9017)**

Comp Aging Limit ☐ Days

20. Click the **Enter** ✓ button.

21. Click the **Save (Ctrl+S)** 💾 button.

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

- **Overtime Compensation (IT 9005)** - Stores settings related to overtime compensation.

  o  If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record (which is this area).

  o  If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.).

  o  If it is to be paid out immediately, the Immediate Payout checkbox should be checked.  The default is 365 days.  An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

- **Holiday Payout Period (IT 9006)** - Indicates if overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-Subject only) at a point earlier than 12 months from when it was earned.  The Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.).  The default is 365 days.  If no record exists, the default value of 365 applies.  If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

- **Night Shift Prem Rate (IT 9007)** - Pay rate increase for Night Shift premium.  If OSP has approved a rate other than the default of 10%, the rate as a percentage must be entered in the rate field.

- **Evening Shift Premium (IT 9008)** - Stores settings for positions that are eligible for evening shift premium.  OSP approved rates other than the default of 10% must be entered in the rate field.

- **Weekend Shift Premium (IT 9009)** - Stores settings for positions that are eligible for weekend shift premium.  The OSP approved rate other than the default of 10% must be entered in the rate field.

- **Holiday Premium Rate (IT9010)** - Pay rate increase for Holiday Pay.  The OSP approved rate other than the default of 50% must be entered in the rate field.

- **On-call (IT 9011)** - Stores settings for positions that are eligible for On-Call compensation.  The accrued box should be checked if the time is to be collected as On-Call comp time.  The rate field must be populated with the OSP approved on-call rate.

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

22. Click the **Cost** [ Cost ] tab button.

Notice the confirmation message at the bottom of the screen.  The same position number is used, but the system is notifying you that the additional data has been saved.

The initiator/requestor of the new position will not be entering any data on the cost tab.  The workflow process includes the Funds Approver, who will enter the budget information on this Cost tab.

Notice that the Cost tab fields are grayed out - the initiator/requestor does not have access to enter information here.

You may save this information as many times as you like, each time you will receive a confirmation of the Save.

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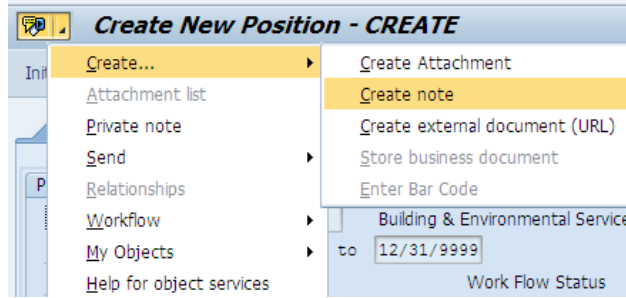
You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.

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

25. Click **Create... >> Create note**.

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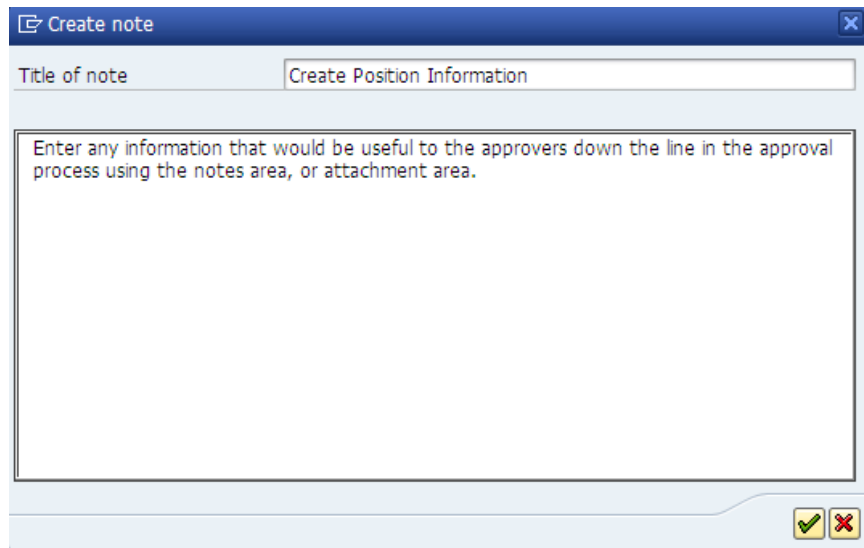


26. Update the following fields:

| Field Name | Description | Values |
|---|---|---|
| Title of note | The short text to act as the title of the attachment | Enter value in Title of note.<br><br>**Example**: Create Position information |
| Long text | An open text field | Enter value in Long text.<br><br>**Example**: text as appropriate |

27. Click the **Copy (Enter)** ✅ button.
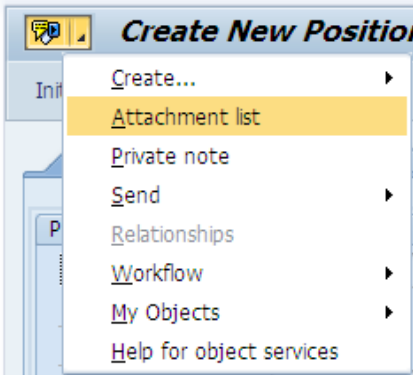


28. Click the **Services for Objects** button.

29. Click **Attachment list**.
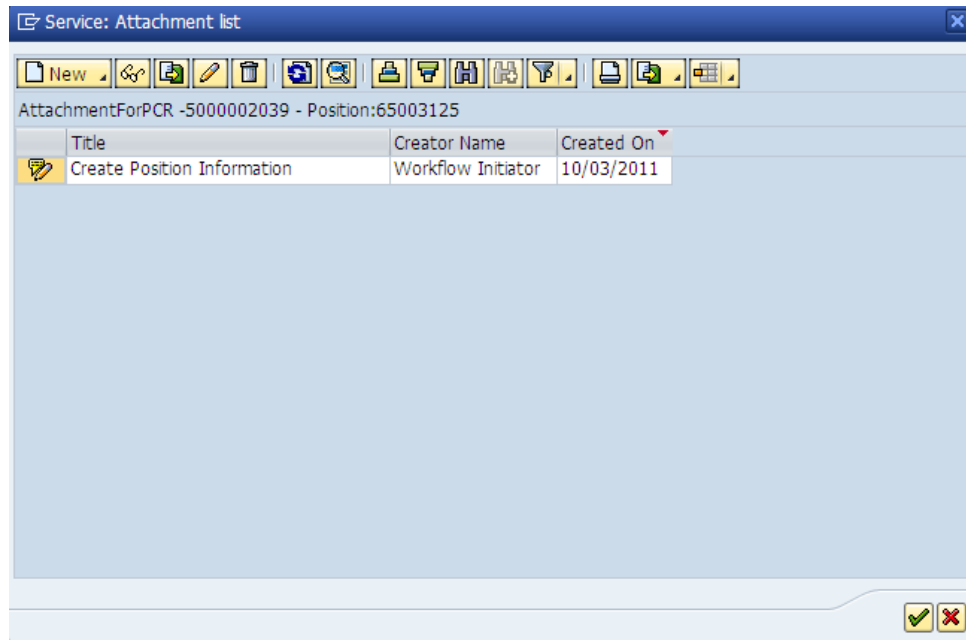


To view any notes or attachments added to this position request, go to the list of attachments on this PCR.

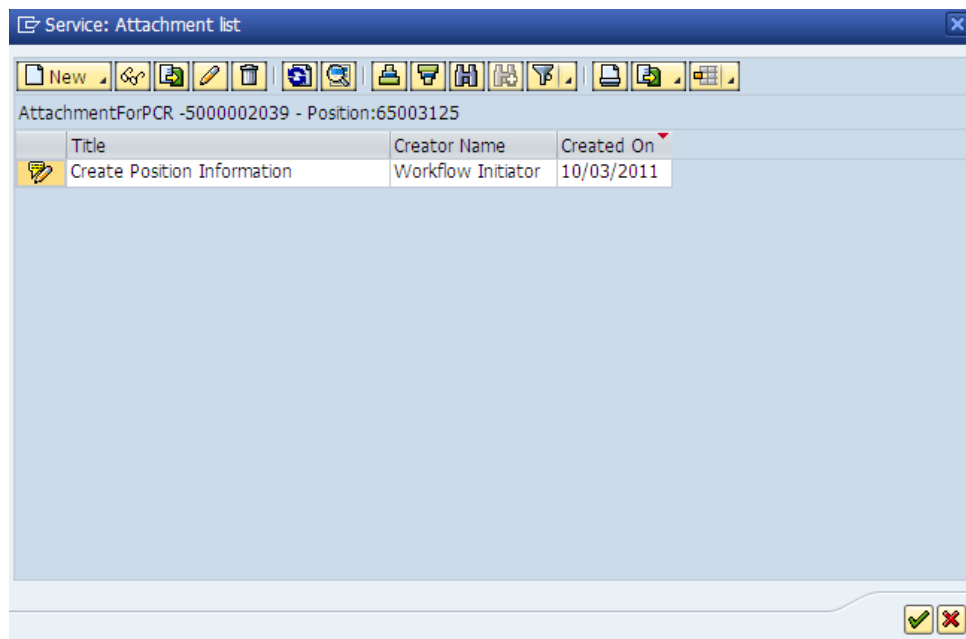30. Click the **Note title** Create Position Information button.

31. Click the **Display (F7)** button.
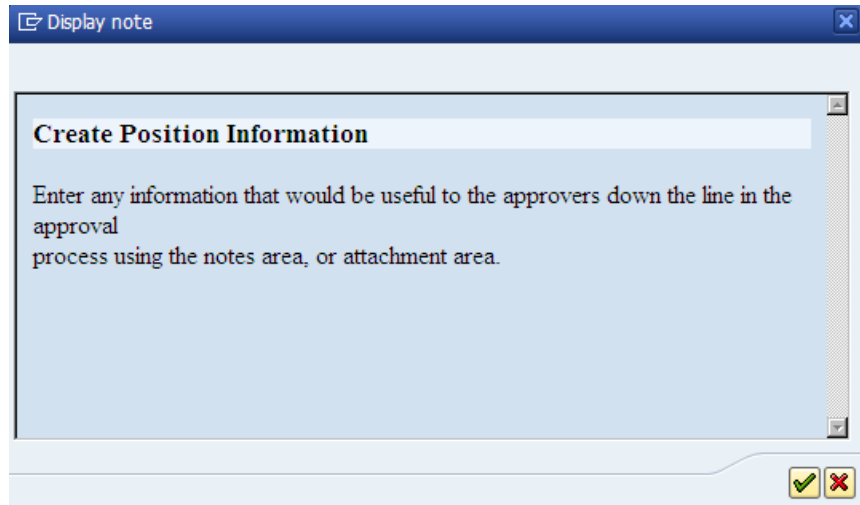
This note and attachment area only gets attached to this specific PCR. It will follow the PCR through the approval/rejection process, and live with the PCR into the future. When the PCR has been approved, you will need to recreate (or copy/paste) any notes or attachments if they need to be attached to the Position Action record as well.

Follow the OSP or Agency-specific guidelines on notes and attachments to be added.

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



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

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

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

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



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

The system task is complete.

## ADDITIONAL RESOURCES

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

| Student Guides | OM210 – Organizational Management for Agencies |
|---|---|
| | • *Training HELP website > Student Guides > OM210 – Organizational Management for Agencies* |
| Job Aids | OM Fields |
| | • *Training HELP website > OM > Job Aids* |