OM-13 OM Tips and Tricks

Purpose

The purpose of this job aid is to act as a companion to all Organizational Management-Business Process Procedures (OM-BPP). Reference this job aid prior to following any OM BPP instructions.

OM Actions: Always begin an Organizational Management Position Action by initiating transaction code ZOMA069 (Position Action). The Position Action can be thought of as a form which contains data to be approved. The data is held in the Planned status until all approvals have been received, and the BEST Shared Services team processes the Action. After completing and saving the Position Action, you will receive a Position Change Request (PCR) number. This PCR can be modified until it has been submitted to workflow, at which point it is only able to be displayed. The PCR will then be routed through the Workflow process based on the rules of the specific Action. When all approvals have been completed, the OM PCR will be sent to the inbox of the BEST Shared Services team to be processed, who will change the data from a Planned status to a status of Active. Examples of OM Actions include Create New Position, Reallocate Position, and Transfer Position.

- Execute: The execute button starts the processing of the transaction or report. Not all functionality requires the Execute button, some have the Enter or Continue button instead.
- Save: Before exiting the system, click Save to validate and save all edits/changes you have made to the data. This will not only validate that the data has been correctly entered (not that the correct number was chosen, but that it was entered in the correct format), but also save the data and incorporate it within the SAP system. SAP is a live system; the data is available to others as soon as it has been saved.
- Notes can be attached to the PCR to aid in the approval decisions by those in the approval workflow chain. These notes will not transfer to the Action but can be copied and pasted into new notes within the Action.

- These instructions only bring the Initiator through creating an Action 100 Create New Position PCR, not through the approval process. See the individual instructions per approver level for more details.
- Prior to initiating any workflow, ensure the data being used is valid and appropriate. For example, if working with a New Hire workflow, ensure the position is vacant.
- Numbers can be entered without hyphens.

Best Practices

- Write the position number and PCR# on the package or form for reference.
- **Click or Enter** on the keyboard to validate data after entry. This is helpful prior to saving or moving to the next screen – the system will validate the entered data and provide information if any of the data is in an incorrect format or missing. The system will not validate whether the correct data has been entered from a business angle, such as which position entered – only that the position has the correct number of characters, etc.
- **Execute**: The Execute button starts the processing of the transaction or report. Not all functionality requires the Execute button; some functions have the Enter or Continue button instead.
- **Save**: Before exiting the system, make sure to click Save to validate and save all edits/changes you have made to the data. This will not only validate the data has been correctly entered (not that the correct number was chosen, but that it was entered in the correct format), but also save the data and incorporate it within the Integrated HR/Payroll System. The Integrated HR/Payroll System is a live system; the data is available to others as soon as it has been saved.

Functionality

- Numbers can be entered without hyphens, such as social security numbers and telephone numbers.
- Position actions are date sensitive. Dates can be entered for an event in the future and will not take effect until that date but will display in the system as soon as they are entered (future-dated actions will not be

visible unless searched within that date range – the default date range for searches is the current date).

- Notes can be attached to the PCR to aid in the approval decisions by those in the approval workflow chain. These notes will not transfer to the Action but can be copied and pasted into new notes within the Action.
- Prior to initiating any Workflow, ensure the data being used is valid and appropriate. For example, if working with a Reallocate workflow, ensure you know the correct Job.
- These instructions only bring the Initiator through creating an Action 100 Create New Position PCR, not through the approval process. See the individual instructions per approver level for more details. Also see the WF220 SAP Workflow Student Guide located on the OSC website.

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