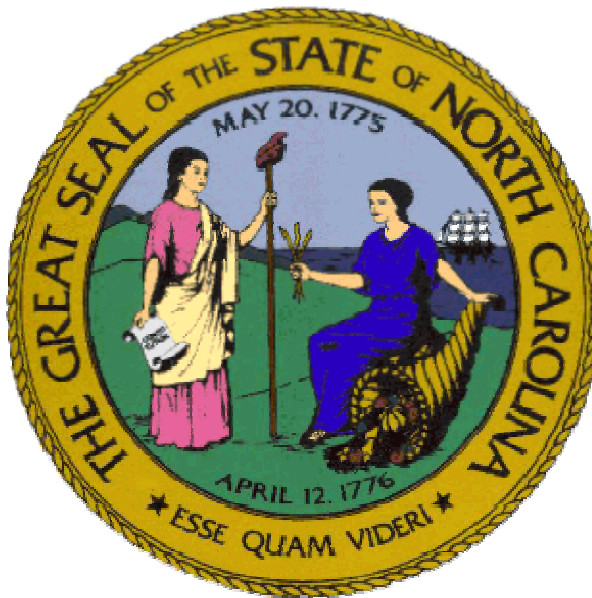


OSBM

**Beacon Training Staffing Survey of State Agencies and  
Universities that Use the Beacon System**

**As directed by S.L. 2008-107, Section 22.5**

**March 1, 2009**



*Prepared By:*

***Office of State Budget and Management***

**[THIS PAGE IS INTENTIONALLY LEFT BLANK]**

# INTRODUCTION

## *Scope of Study*

Section 22.5 of Session Law 2008-107 directs the Office of State Budget and Management (OSBM) to conduct a staffing survey of all State agencies and universities that use the BEACON system to determine the number of FTE staff assigned to BEACON training. Please note that the university system does not use the BEACON system; therefore it was not included in this report. Table 1 in the Findings section of the report identifies those agencies that use the BEACON system.

## *Methodology*

To conduct the study, the OSBM study team sent each State agency that uses the BEACON system a survey asking the following questions:

- Does your agency use the BEACON system?
- Does your agency have staff (FTE) who conduct Beacon training for your employees? If so, please identify the position number, area of training, and associated FTE.
- Does your agency have a need for staff to conduct BEACON training? If so, in what areas, and what is the associated FTE for this training.

# BACKGROUND

BEACON is a statewide collaborative effort to transform the way the State of North Carolina does business by modernizing and standardizing key business processes such as human resources and payroll. With the implementation of SAP's Enterprise Resource Planning (ERP) software solution, the goal of BEACON is to build a foundation for management flexibility, increased efficiency, and improved access to information, ultimately enhancing the quality of services to North Carolina's citizens.

The Office of the State Controller (OSC), Information Technology Services (ITS), the Office of State Budget and Management (OSBM) the Office of State Personnel (OSP), and the Department of Transportation (DOT) are overseeing the implementation effort.

Session Law 2004-129 appropriated \$2.7 million from the IT Fund to the Office of the State Controller in 2004 to begin implementation of the recommendations in the Statewide Business Infrastructure Study. Of the \$2.7 million, the Program Steering Committee (PSC) allocated \$1.8 million to the HR/Payroll Initiative and \$900,000 to the Enterprise Data Warehouse Initiative. The 2005-06 appropriation for the HR/Payroll project was \$20,875,000. The full estimated cost for the HR/Payroll project is \$125,500,369.<sup>1</sup>

# FINDINGS

Table 1 on the following page shows the 39 State agencies, Boards and Commissions that utilize the BEACON system. Of the 39 agencies, boards and commissions there are only 3 agencies (Department of Revenue, Secretary of State, and IT) that indicated that they have FTE associated with training for the BEACON system. For all three agencies combined this comprises a total of .41 FTE training in the areas of Organizational Management (OM), Personnel Administration (PA), Employee Self Service (ESS), Manager Self Service (MSS), and Time Administration. The other 36 agencies indicated that they do not have staff dedicated to BEACON training; however, 14 of the 36 agencies indicated that they needed additional staff for BEACON training. When further

---

<sup>1</sup> Adopted from the Office of the State Controller's website ([www.beacon.nc.gov/about/index.html](http://www.beacon.nc.gov/about/index.html)).

asked in what specific areas training was needed, it was concluded that the training can be and is provided by the training courses offered at BEACON. See Appendix A for a list of the BEACON training courses.

**Table 1**

**State Agencies, Boards and Commissions that Utilize the BEACON System**

Agency	Boards and Commissions
Administrative Office of the Courts	Board of Auctioneer Licensing
Department of Administration	Board of Barber Examiners
Department of Agriculture	Board of Cosmetic Arts
Department of Commerce	Board of Opticians
Department of Correction	Psychology Board
Department of Crime Control & Public Safety	State Board of Ethics
Department of Cultural Resources	
Department of Environ. & Natural Resources	
Department of Health & Human Services	
Department of Insurance	
Department of Justice	
Department of Juvenile Justice & Delinquency Prevention	
Department of Labor	
Department of Public Instruction	
Department of Revenue	
Department of the Secretary of State	
Department of the State Treasurer	
Department of Transportation	
Employment Security Commission	
Governor's Office/Office of State Budget Management	
NC Community College System	
NC Education Lottery Commission	
NC School of Science & Math	
Office of Administrative Hearings	
Office of Information Technology Services	
Office of State Personnel	
Office of the Lt. Governor	
Office of the State Auditor	
Office of the State Controller	
State Board of Elections	
State Health Plan	
Wildlife Resources Commission	

## CONCLUSION

The Office of the State Controller should continue to offer overview classes for all State agencies that utilize the BEACON system, and continue to develop training classes that are structured towards individual agency needs.

**APPENDIX**

**AGENCY BUSINESS FUNCTION STAFFING DATA  
And  
RELATED TRANSACTIONAL DATA**

**[THIS PAGE IS INTENTIONALLY LEFT BLANK]**

**BEACON UNIVERSITY MASTER COURSE LIST  
AS OF MARCH 1, 2009**

Topic	Course ID	Course Name	Prerequisite	Length	Type	Offerings	Frequency	Description	Audience
General	BC100	Beacon Overview	None	1	WBT	N/A	N/A	This course provides participants with a high level overview of the Beacon project, including the change imperative, project benefits to the State, and the overall scope of the project. In addition, Shared Services processes and scope will be covered in detail.	All Non-ESS roles
General	BC110	SAP Basic Navigation	None	1.5	WBT	N/A	N/A	This course provides participants the basic skills necessary to navigate in SAP ERP. This includes logging on, basic screen information, accessing transactions, basic searches, describing various types of system messages and how to obtain system help.	All Non-ESS/MSS roles
General	BC120	Reporting Overview	BC100 BC110	2	WBT	N/A	N/A	This course provides an overview and basic navigation for SAP ERP and Business Information reporting.	All SAP ERP and BI Rpt Users
General	BI210	BI Reporting	N/A	2	WBT	N/A	N/A	This course provides an overview of the BI reporting features in SAP. Topics include: Deciding when to use BI reports (versus ERP), types of reports, variants, as well as sorting, filtering, exporting, and printing report data.	All SAP ERP, MSS Users
PA	PA200	PA Overview and Display	BC100 BC110	2	WBT	N/A	N/A	This course provides SSC users and Core HR users with a general introduction to processes in SAP Personnel Administration. Included in the course are terms, definitions, concepts, and an overview of PA process changes including differences between Agency roles and Shared Services roles.	All PA roles
PA	PA210	PA Terms, Concepts and Display Data	BC100 BC110 PA200	4	ILT	2	Month	This course is intended to provide participants with the terms, concepts, knowledge and skills associated with SAP ERP Personnel Administration as well as displaying an employee's personnel information.	Master Data Maintainer Master Data Approver Warnings Maintainer Grievances Maintainer Display Sensitive Display Non-Sensitive Performance Rating Maintainer Performance Mass Maintenance Special Transfers Position Posting Maintainer Short-Term Disability Specialist HR Directors
PA	PA310	Create/Maintain Employee Data	BC100 BC110 PA200 PA210 WF220	16	ILT	1	Week	This course provides the method of creating new employee data and updating existing employee data in SAP. Also included are discussions on how history is created.	HR Master Data Maintainer HR Master Data Approver
PA	PA315	Create/Maintain Employee Data	BC100 BC110 PA200 PA210 WF220	8	ILT	2	Month	DOC Version of PA 310	DOC
PA	PA320	Maintain Warnings & Grievances	BC100 BC110 PA200 PA210	4	ILT	1	Month	This course provides participants with the skills to view and update disciplinary warnings, view the employee's personal information, organizational assignment, and other information as necessary to complete a warning.	Warnings Maintainer
PA	PA330	Create Adjustment Reasons	BC100 BC110 PA200	2	WBT	N/A	N/A	This class provides participants with the skills to create adjustment reasons in the portal. This user will usually be in a decentralized office where the HR Data Maintainer is not present.	Varies - As Designated by Agency
PA	PA340	Maintain Performance Rating	BC100 BC110 PA200 PA210	2	WBT	N/A	N/A	This course provides participants with the skills to update the employee's performance ratings and view organizational assignment.	Performance Rating Maintainer Performance Rating Mass Maintainer
PA	PA350	Position Vacancy Posting	BC100 BC110 PA200 PA210 OM200	4	ILT	1	Month	This course provides participants with the skills to enter a description of work (DOW), competencies, skills and abilities (KSAs), training and experience requirements, posting and closing dates, and other information necessary to post a vacant position.	Position Vacancy Posting Maintainer
PA	PA370	Short Term Disability	BC100 BC110 PA200 PA210	4	ILT	1	Month	This course provides SSC users with the skills to update Leaves of Absence with and without leave.	Short Term Disability Specialist
PA	PA410	Advanced Create/Maintain Employee Data	BC100 BC110 PA200 PA210 PA310	12	ILT	2 or 3	Month	This course will provide participants with the skills to hire employees from non-BEACON agencies, execute transfers between agencies, understand dual employment, process a reallocation, and execute both leaves of absence and career progressions.	HR Master Data Maintainer

**BEACON UNIVERSITY MASTER COURSE LIST  
AS OF MARCH 1, 2009**

Topic	Course ID	Course Name	Prerequisite	Length	Type	Offerings	Frequency	Description	Audience
OM	OM200	Organizational Management Overview	BC100 BC110	4	ILT	2	Month	This course provides Agency HR users with a high level overview of Organization Management, structure, associated objects and info types. SAP training is also provided to display and analyze the organizational structure. In addition, this course provides the training required to perform day-to-day Organization Management activities for Agencies.	OM Position & Org Unit Requestor OM Position & Org Unit Approver Agency Position Funding Approver OSBM Position Funding Approver Position Vacancy Posting Maintainer Display Organizational Management
OM	OM210	Organizational Management for Agencies	BC100 BC110 OM200	12	ILT	2 or 3	Month	This course will teach the student to perform position actions using the position action and maintain position action transaction codes. In addition, the course will show the student how to display position data and search for position status. Applicable workflow will also be covered in this course.	OM Position & Org Unit Requestor OM Position & Org Unit Approver Agency Position Funding Approver OSBM Position Funding Approver Position Vacancy Posting Maintainer Display Organizational Management
OM	OM250	Agency Funding Approver	BC100 BC110 WF220	4	ILT	1	Month	This course provides the student with an understanding of the Crosswalk between NCAS and SAP and the relationship between BEACON and Salary Control. The class will cover Infotypes 1018, 9018, and the related workflow.	Agency Position Funding Approver OSBM Position Funding Approver
BN	BN200	Display Benefit Enrollments	BC100 BC110	8	ILT	2 or 3	Month	This course provides Agency Core HR users with the ability to display personnel information and benefit elections. This information includes required personal data pertaining to the employee and family, basic enrollment information for insurance elections and benefits.	Display Benefits Benefits Administration
BN	BN300	Enrollment and Group Processing	BC100 BC110 BN200	8	ILT	In Development	TBA	This course provides administrators with the ability to maintain employee benefits information in SAP. This includes: managing enrollment plans for Annual Enrollment, NC Flex Plan, State Health Plan, 401K, 457 and 403B plans. Administrators will also be able to monitor/identify changes in insurability and termination of plan participation.	Benefits Administration (BEST Shared Services Only)
PY	PY200	Payroll Overview/Process & Policy Changes	BC100 BC110	4	WBT	N/A	N/A	This course provides an explanation of the new payroll processes, identification of policy changes, and a discussion of retroactive payroll. In addition, this course will provide users with a better understanding of the role of SSC with regards to Payroll Processing and support.	All Payroll roles
PY	PY300	Payroll for Agencies	BC100 BC110 BC120 PY200	8	ILT	2 or 3	Month	This course will enable Agency users to display pertinent payroll information such as payroll results, calendars, and miscellaneous reports. Upon finishing this course, users will be able to provide agency payroll support for wage types, bank details, recurring, and additional payments in addition to understanding agency managed processes.	Display Payroll (Agency-appointed payroll liaison)
PY	PY310	Payroll Maintainer	BC100 BC110 BC120 PY200	8	ILT	2	Month	This course will provide participants with the skills to maintain agency related payroll data. Information to include agency specific deductions and supplements. This course will also include agency reports such as payroll results, calendars, and miscellaneous reports. In addition, this course will provide SSC personnel with training for day to day workflow.	Payroll Administration Central Payroll Processing
FI	FI300	Master Data Workshop	BC100 BC110	4	ILT	N/A	N/A	This workshop provides Master Data maintainers with the knowledge and skills to maintain Finance Master data in SAP ERP.	SSC Master Data Maintainer
TM	TM200	Time Overview	BC100 BC110	1	WBT	N/A	N/A	This course provides users that will be working directly in SAP ERP with an overview of Time Management. The course will cover BEACON policy and process changes. ESS and MSS users do not need to attend this course.	Time Administrators Leave Administrators SSC Time Users
TM	TM210	Preliminary Material for Leave Administration	TM200	1	WBT	N/A	N/A	Introductory material for TM310	Leave Administrators
TM	TM220	Preliminary Material for Time Administration	TM200	1	WBT	N/A	N/A	Introductory material for TM300	Time Administrators
TM	TM300	Time Administration	BC100 BC110 TM200 TM220	8	ILT	1	Week	This course provides Time Administrators with the ability to describe time roles and responsibilities, record, review, correct, and approve time in SAP ERP. Other administrative tasks in this course include: the review of work schedules, premium pay eligibility calculations, time evaluation, review of leave limits, review of holiday balances and general payroll data reporting.	Time Administrators SSC Time Users
TM	TM310	Leave Administration	BC100 BC110 TM200 TM210	4	ILT	2 or 3	Month	This course provides Leave Administrators with the ability to perform leave administration in SAP ERP. Administrative tasks in this course include: the review of work schedules, time evaluation, review of leave limits, review of holiday balances, FMLA, generating absence quotas, and general payroll data reporting.	Leave Administrators
TM	TM340	Voluntary Shared Leave	BC100 BC110 TM200 TM210 TM310	2	WBT	N/A	Month	This course will teach the student the basic processes for creating voluntary shared leave donations and credits between employees. The student will learn to use the PA61 transaction code to create the appropriate records for both the donor and recipient.	Leave Administrators
ESS	ES200	Maintain Personal Information/Overview	None	1	WBT	N/A	N/A	This course provides participants with the skills necessary to access the ESS system. Users will learn how to: view/modify their personal data for W-4 Tax Withholding, Reprint W-2s, update bank information and family member/dependent data. For Go-Live, the shared service organization will be available to help users enter/complete required changes in the system.	ESS



**BEACON UNIVERSITY MASTER COURSE LIST  
AS OF MARCH 1, 2009**

Topic	Course ID	Course Name	Prerequisite	Length	Type	Offerings	Frequency	Description	Audience
MSS	MS200	Manager Time Approval	ES200	2	WBT	N/A	N/A	This course provides Manager Self Service (MSS) users with the ability to review and approve time, review and approve leave requests, and perform basic reporting of time data. Managers from agencies that will interface their time data to SAP ERP, or use manual time sheets do not need to attend this course.	MSS
WF	WF220	SAP BEACON Workflow	BC100 BC110	4	ILT	2 or 3	Month	This course is designed to teach the student the workflow process, including the tasks related to both the workflow initiator and approver, as well as to demonstrate the workflow tools and inbox.	OM Position & Org Unit Approver Agency Position Funding Approver OSBM Position Funding Approver
SO	NCAS01	NCAS Basics	None	1	WBT	N/A	N/A	This course provides the user with a basic overview of the NCAS system, including mainframe logon / logoff, terminology, navigation, accessing help, and basic reporting.	All NCAS Users
SO	NCAS04	NCAS Basics for Auditors	None	8	ILT	2	Year	In addition to providing the user with a basic overview of the NCAS system, including mainframe logon / logoff, terminology, navigation, accessing help, and basic reporting, this course also serves as an introduction to purchasing, budgetary control, fixed assets, accounts payable / receivable, and OSC support of the NCAS system.	Auditors
MM	PC01	Procurement Card	NCAS01 AP01 or AP03	4	ILT	6	Year	Content of this course includes: accessing the procurement card module, adding cardholders, reconciling transactions, maintenance, invoices, and agency policy.	Procurement Card Managers
MM	AP02	Accounts Payable Management	NCAS01 AP01 or AP03 or 6 Months Exp.	6	ILT	2	Year	The objectives of AP02 include: Requesting check runs, printing / recording checks, daily AP balancing, and basic information access (reports).	Accounts Payable Managers
MM	AP03	Accounts Payable Matching	NCAS01	8	ILT	6	Year	Content includes business process / policy overview, processing exceptions, adjusting payments, obtaining signature verification, and manually closing purchase order lines to invoicing.	Accounts Payable Mgrs / Processors
MM	AP01	Accounts Payable Overview	NCAS01	24	ILT	8	Year	Includes all AP03 topics plus special processes (e.g. sales tax), processing and maintenance of invoices / debit memos / credit memos, document inquiries, and information access (reports).	Accounts Payable Mgrs / Processors
MM	AP07	Accounts Payable Basics	NCAS01	8	ILT	6	Year	Basic A/P content including account balancing, researching inquiries, processing invoices, and applying key matching concepts.	Accounts Payable Clerks / Mgrs
MM	IN01	Inventory Management	NCAS01	24	ILT	TTT / Agency Support	Agency	This course will teach the NCAS user to establish inventory information, replenish inventory, evaluate supply, process backorders, document numbers, use cycle counts to reconcile inventory, and other related topics.	Warehouse Admins / Managers
MM	IN02	Inventory Accounting	NCAS01	8	ILT	TTT / Agency Support	Agency	Teaches the student to define accounting distributions, audit inventory accounting transactions, and analyze inventory activity.	Inventory Accountants
MM	IN06	Usage Orders	NCAS01	4	ILT	TTT / Agency Support	Agency Request	Introduction into usage orders, entering and approving.	Requisitioners, Warehouse Clerks
MM	IN07	E-Procurement Purchasing	NCAS01	4	ILT	TTT / Agency Support	Agency Request	This course includes material associated with replenishing inventory, evaluating supply, external replenishment, and reports.	Warehouse Managers, Buyers, Approvers
MM	IN05	Inventory for LEAs	None	4	ILT	TTT / Agency Support	Agency Request	Includes the same topics covered in IN07, plus using / navigating X/NET.	Textbook Coordinators
MM	IN03	XPTR for Inventory	None	4	ILT	TTT / Agency Support	Agency Request	This course includes online help, initial setup, and viewing / printing reports.	Fiscal and Materials Management Staff
MM	IN04	Accounts Receivable for Inventory	None	8	ILT	TTT / Agency Support	Agency Request	Content of this course includes an overview, A/R policy, customer setup, invoicing, cash application, processing inquiries, and account cleanup.	Accounts Receivable Clerks
GT	FA01	Fixed Asset Basics	NCAS01	4	ILT	4	Year	A course dealing with fixed assets, specifically: entering, changing, transferring, retiring, deleting, and interfacing to the fixed asset module.	Fixed Asset Officers
MM	1099	1099 Processing	NCAS01 AP01	8	ILT	4	Year	Instructs the employee in the 1099 process overview, establishing vendor 1099 information, making corrections, distributing / filing 1099s, withholdings, and other 1099 topics.	AP Managers and Assists
MM	VN01	Vendor Processing	NCAS01	6	ILT	2	Year	This course includes a policy / vendor overview and discussion of various types of vendors: e.g. employee, non-trade, e-pay, trade, and others.	Accounts Payable Mgrs / Processors
GA	SM01	Agency System Management	NCAS01	16	ILT	6	Year	Comprehensive course covering such topics as: the business process overview, chart of accounts, basic inquiry, correcting transactions, system balancing, the general ledger, intergovernmental transactions, recording cash receipts, and system reports.	Accounting Management / Various Managers
GA	CI01	Capital Improvements	NCAS01 SM01	2	ILT	2	Year	Includes the business process overview, chart of accounts structure, budget authorization, NCAS accounting procedures, account balancing, and information access (reports).	Capital Improvement Managers
BD	BD01	Budget Management	NCAS01	8	ILT	6	Year	This course teaches the employee to establish the budget, check funds, record transfers, process documents, run reports, and to understand the OSBM / BRS interface process.	Budget / Fiscal Officers, Accounting Management
IA	IA01	Information Access	NCAS01	3	WBT	N/A	N/A	Teaches the student to perform an online report query, the Report Management Distribution System (RMDS), Information Expert (IE), and SmartStream Decision Support.	All NCAS Users
IA	IE01	Using IE in the NCAS Environment	NCAS01 IA01	4	ILT	4	Year	The student will leave the course with an understanding of the NCAS environment, basic IE concepts, IE reports, and selected advanced features.	Primary NCAS IE Users

**BEACON UNIVERSITY MASTER COURSE LIST  
AS OF MARCH 1, 2009**

Topic	Course ID	Course Name	Prerequisite	Length	Type	Offerings	Frequency	Description	Audience
IA	IE03	Basic IE Reporting	IE01	16	ILT	4	Year	Comprehensive course that covers such topics as: understanding the eight NCAS business applications, basic IE terms, creating IE reports, the Expert Language commands, maintaining the user library, and problem research / resolution.	NCAS Report Writers, Experienced IE Users ONLY
IA	IE04	Advanced IE Reporting	IE01 IE03	8	ILT	2	Year	More complex IE topics covered: advanced data access techniques, data storage commands, looped commands, creating subroutines, and creating output datasets.	NCAS Report Writers, Experienced IE Users ONLY
IA	DSS-01A	DSS Basics	NCAS01 IA01	8	ILT	6	Year	Upon completion of this course, the employee will understand the role of the DSS in NCAS and the nature of the information in the DSS databases. The class will also cover exporting data, selecting a report, and accessing available help and learning resources.	Program Managers, IT Directors, End Users, CFOs
GT	SA01	Security Admin's Workshop	NCAS01	4	ILT	3	Year	Overview course of system security, agency security profile procedures, and OSC security requirements.	System Security Administrators