Position Roster with Salary Report Job Aid:

This job aid will guide a user through the steps of accessing and running the Position Roster with Salary Report.

Procedure At-a-Glance

Category: Position Management Reports
Audience: Campus HCM Users, Human Resources Representatives, Finance Representatives
Navigation: HR BAIRS (HR Reports > Workforce Detail > Position Data > Position Roster with Salary Report)

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Report Description

This report will list all positions and, if selected, all incumbents hired into each position including salary data, as of today's date. Based on the population selected, other key data points of the report include the comparison of Position FTE, Position Headcount, and Current Job FTE.

Business Need

Human Resources and Finance representatives need to have access to their units' comprehensive Position Data in a way that facilitates easy analysis. This report will deliver a set of Position Data as determined by criteria supplied by the user including filled and vacant positions and the incumbents holding these positions. The report can be used to identify positions that can be grouped together to create multiple headcount positions. Additionally, the report can identify inconsistencies between a unit's Position Data and Incumbent Job Data.

To Run the Report

Users can access and run the report by following these basic steps. Additional details are provided later in the document.
- Log in to HR BAIRS (http://rptportal.berkeley.edu/).
- Follow this navigation to the report: HR Reports > Workforce Detail > Position Data > Position Roster with Salary Report.bqy.
- Accept defaults or select filters:
  - Show Incumbent Data (for Salary, always accept this default)
  - Org Nodes
  - Jobs (Job Code)
  - Positions
  - Position Status
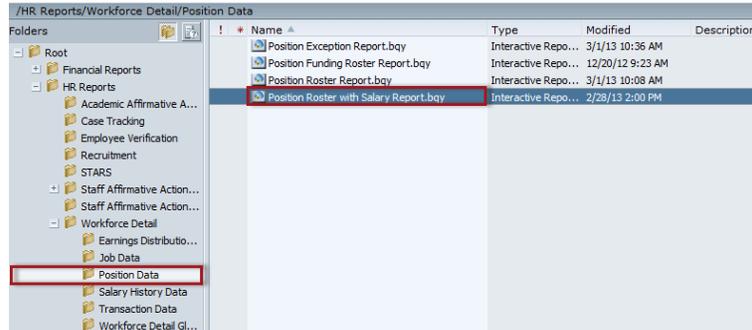
Roles that can access the Report

Users with HR Workforce Detail access can also access the Position Roster Report.

Future Modifications

Please submit suggested modifications to: hrmshelp@berkeley.edu.

Procedure Steps:

1. Navigate to the Position Roster with Salary Report in HR BAIRS:

2. Open the Position Roster with Salary Report file and enter the Report Parameters (Click for more details):

3. Once all Report Parameters are set, click the "Process" button to run the report.
4. Save Report as a PDF document (.pdf).

Report Parameters:

1. **As of Date:** "Snapshot" as of today's date (system date). Only data that exist as of this date with be pulled into the report.

2. **Show Incumbent Data:** For Salary, always select "Yes". If "Yes" is selected, then all Incumbent details will appear in the report (if applicable). In "No" is selected, then only Position Data information will appear in the report.

3. **Employment Status:** The value is currently set only to "A/L/P". When showing Incumbent details and calculating FTE amounts, jobs will be included according to the following employment status chart:

Employee Code	Description	Included in Report
A	Active	Yes
L	Leave of Absence	Yes
P	Leave with Pay	Yes
D	Deceased	No
Q	Retired with Pay	No
R	Retired	No
S	Suspended	No
T	Terminated	No
U	Terminated with Pay	No
V	Terminated Pension Pay Out	No
W	Short Work Break	No
X	Retired – Pension Administration	No

4. **All Org Nodes:** Alphabetical list of all Org Nodes in the system available as report parameters. Org Nodes are associated with the "Department" field within Position Data in HCM. Options for selecting data include:

   a. **"All Org Nodes":** Report will include data for all Org Nodes to which the user has security access. This is not suggested for users with access to a large number of Orgs on campus as it will significantly slow report performance.

b. **Manually Enter Org Codes:** Enter the 5 letter code of any control unit, division, or department to which the user has security access

c. **Select from list of codes sorted by 5 letter code:** Select the "List" button to show a dynamic list of current codes. Select one Org Code, or several, and click the "Add" button.


d. **Select from list of codes sorted by the description:** Select "Org Node Names" button to show a dynamic list of current codes sorted alphabetically by the description. Select one, or several, and click the "Add" button.

e. **Select from a combination of the above methods:**

5. **All Jobs:** List of all Job Codes that exist in the system. To run the report for certain Job Codes only, either enter the Job Codes directly in the entry screen (in field 1 below) by using the "Add one" option or use the "List" option to select certain Job Codes (sorted by either the code itself or the name of the code)

6. **All Positions:** Enter one (or more) Position Numbers to run the report based on Position Number.

7. **Position Status:** The report can be run to show positions based on status; for instance, only filled positions that fit the above criteria. Position status is a derived field comparing the individual Position details to each of the incumbents currently hired into the selected Position(s) (Only analyzes Incumbents with A/L/P Employment Status). Individual Position Status can be determined by the below table. The dashboard selection defaults to all statuses except Inactivated.
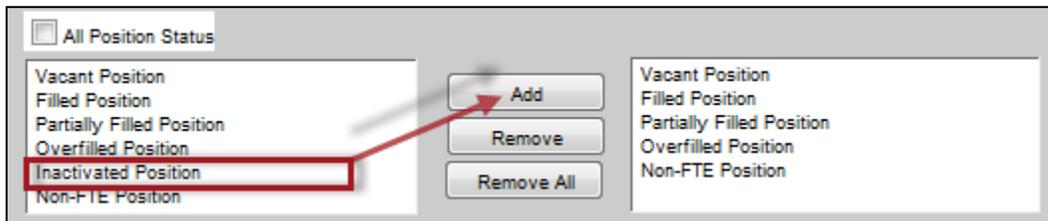
Position Status	Description
Vacant Position	The Position FTE (or Standard Hours) is greater than 0 but there are currently no incumbents hired into the particular position.
Filled Position	The Position FTE (or Standard Hours) is greater than 0 and the Total Position FTE (FTE x Max Head Count) is equal to the Total Job FTE (Sum of all Job % effort across all incumbents).
Partially Filled Position	The Position FTE (or Standard Hours) is greater than 0 and the Total Position FTE (FTE x Max Head Count) is greater than the Total Job FTE (Sum of all Job % effort across all incumbents), but the Total Job FTE is greater than 0.
Overfilled Position	The Position FTE (or Standard Hours) is greater than 0 and the Total Position FTE (FTE x Max Head Count) is less than the Total Job FTE (Sum of all Job % effort across all incumbents).
Inactivated Position	Position Status is set to "Inactive".
Non FTE Position	Position FTE (or Standard Hours) are set to 0.

Reading the Report:

Showing Position & Incumbent Data [Click Here for Sample + Description] Note: It is assumed this report will be run showing Position & Incumbent data, in order to include Salary. For a sample and description of the report showing Position Data only, see the Position Roster Report job aid.

Position Roster with Salary Report (Position and Incumbent Data):

Identifier	Description
1	**As of Date:** Parameter Entered for "As of Date"
2	**Pages & Run Date:** The total number of pages for the report along with the time & date the report was run.
3	**Parameters:** All parameters entered on the original report dashboard

Position No./ Empl. ID	Position Eff. Date/ Job Eff. Date	Position Title / Employee Name	Job Code/ Rcd #	EE Stat	Reports to Position / Supervisor ID	FTE / Appt Type	HC	Total Position FTE	Total / Job FTE	O/A Scl	SAP	Grd	Step	Annlzed Rate
Position Dept: Academic Senate (KGACS)														
Position Org Node: KGACS Acad Senate Ops (10160)														
Filled Position														
000184	12/01/2012	Executive Advisor 4	0554U		000127	1.00	1	1.00	1.00					
010	12/01/2012	Green Rush, Andrea Mae	0	A	010 - Maslach Zimbardo	2			1.00		MSP	28	0	$116,097.00
000012	12/01/2012	Project/Policy Analyst 5	0566U		000184	1.00	1	1.00	1.00					
010	12/01/2012	Song, Linda H	0	A	010 - Green Rush	2			1.00		MSP	24	0	$97,823.00
000198	12/01/2012	Assistant III	4722C		000184	1.00	1	1.00	1.00					
010	12/01/2012	Kwok, Marilyn	0	A	010 - Green Rush	2			1.00		CX		13	$54,338.00
000187	12/01/2012	Administrative Officer 2	7376U		000184	0.50	1	0.50	0.50					
010	12/01/2012	Kim, Bonnie F	2	A	010 - Green Rush	2			0.50		PSS	19	0	$55,800.00
000138	12/01/2012	Project/Policy Analyst 2	7397U		000219	1.00	1	1.00	1.00					
010	12/01/2012	Green, Janice E	0	A	01173 - Larsen	2			1.00		PSS	19	0	$56,455.00
000129	12/01/2012	Project/Policy Analyst 2	7397U		000184	1.00	1	1.00	1.00					
010	12/01/2012	Ross, Anita K	0	A	010 - Green Rush	2			1.00		PSS	19	0	$57,206.00

Identifier	Description	Identifier	Description
1	**Report Sort:** The Report is sorted by the following fields: - Position Department (Level 4 or 5) - Position Org Node (LVL 7 DeptID) - Position Status - Job Code	9	**FTE/Appt Type:** Position row will include Position FTE, while the Job Data row will include the Job Data Appointment Type.
2	Position Data will appear in the first line while incumbent (Job Data) will appear in any subsequent lines.	10	**Head Count:** Maximum Head Count set on the Position. No Job Data identifier.
3	**Position No./Empl. ID:** Position row will include the Position Number while the Job Data row will include the Employee ID.	11	**Total Position FTE:** Calculation of FTE x Headcount to represent the total FTE currently tied to the position. No Job Data identifier
4	**Pos. Eff. Date/Job Eff. Date:** Both rows will include the last effective dated row earlier than or equal to the As of Date. The Job Data row is the maximum effective sequence row.	12	**Total Job FTE:** Position Row will include the Sum of all Job FTEs hired into the current position. The Job Data rows will include the individual Job % Effort for each incumbent.
5	**Position Title/Employee Name:** Position row will include the Position Title. The Job Data row will include Employee Name.	13	**O/A Scale:** No Position Data identifier. Will include Off/Above Scale Code from incumbent's job record, if applicable.
6	**Job Code/Rcd#:** Position row will include the Job Code on Position while the Job Data row will include the Job Employee Record Number for the incumbent.	14	**SAP:** No Position Data identifier. Will include Salary Administration Plan from incumbent's job record, if applicable.
7	**Empl. Status:** No Position Data identifier. Will include the current Job Employee Status (Active, Leave of Absence, or Leave with Pay).	15	**Grd:** No Position Data identifier. Will include Salary Grade from incumbent's job record, if applicable.
8	**Reports to Position/Supervisor ID:** Position Row will include the "Reports To" Position Number currently on the Position. The Job Data row will include the Supervisor ID and last name.	16	**Step:** No Position Data identifier. Will include Salary Step from incumbent's job record, if applicable.
		17	**Annlzed Rate:** No Position Data identifier. Will include annualized rate of pay from incumbent's job record Compensation.