

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 (<u>http://rptportal.berkeley.edu/</u>).
- 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)
 - o Org Nodes
 - o Jobs (Job Code)
 - Positions
 - o 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):

Position Management Position Roster with Salary Report	t	Process
As of Date Show Incumb 3/4/2013	vent Data Yes ▼	Employment Status: A/L/P
All Org Nodes	Codes Org Node	de Names I incl. Subordinate Levels
I Jobs		
All Positions	All Positi Vacant Positi Parially Filled Positi Parially Fill Overfilled P Inactivated Non-FTE Po	tion Status sition tion Add Vacant Position Filled Position Partially Filled Position Position Position Remove All Vacant Position Partially Filled Position Non-FTE Position Non-FTE Position
	Beast Date	
	Reset Defa	faults

- 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. <u>As of Date</u>: "Snapshot" as of today's date (system date). Only data that exist as of this date with be pulled into the report.

(As of Date
	3/1/2013

2. <u>Show Incumbent Data</u>: 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. <u>Employment Status</u>: 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
Р	Leave with Pay	Yes
D	Deceased	No
Q	Retired with Pay	No
R	Retired	No
S	Suspended	No
Т	Terminated	No
U	Terminated with Pay	No
V	Terminated Pension Pay Out	No
W	Short Work Break	No
Х	Retired – Pension Administration	No

Employment Status:	A/L/P	

- 4. <u>All Org Nodes:</u> 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. <u>"All Org Nodes"</u>: 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.

All Org	Nodes		

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

All Org Nodes	Org Node Codes	Org Node Names	V inol. Subordinate Levels
	Add One List		
		Add JKASD	
		Remove	
		Remove All	

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

All Org Nodes	Org Node Codes Add One List		Org Node Names	☑ inol. Subordinate Levels
AACHN : Chanco Office AACHO : Chancellor's Immediate Office AACLA : Legal Affairs AACOR : COrE AAUNH : University House) E	Add Remove Remove All	AACLA : Legal Affairs AACHO : Chancellor's Immediate Office AACHN : Chanc Office

d. <u>Select from list of codes sorted by the description</u>: 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.

All Org Nodes	Org Node Codes	Org Node Names	🗹 incl. Subordinate Levels
AA McNair Scholars ; UNDMN AA Miller Scholars Support Pro ; UNDMS AA Student Support Services ; UNDSS Aasd Compliance & Dasbillity ; ECCAF Academic Achievement Programs ; UNSLA	(E) (E)	Add Remove Remove All	

e. Select from a combination of the above methods:

All Org Nodes	Org Node Codes	Org Node Names	✓ incl. Subordinate Levels
ACBUD : Budget Office ADPAO : Planning & Analysis Office	Add One O List	Add	Acad Compliance & Disability : EQCAF JKASD
AECOI : Admin Information Technology AFINM : Fin & Mgmt Analysis AGSPC : Space Mgmt & Capital Programs	•	Remove Remove All	ACBUD : Budget Office

 <u>All Jobs:</u> 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 1below) 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)

All Jobs	Job Codes	🔘 Job Names	
	Add One O List		
		Add	
	1	Remove	
		Remove All	
All Jobs	Job Codes	O Job Names	
	Add One		
0021U : University Controller		Add	
00300 : Chancellor 0032U : Vice Chan (Restricted Use)		(E) Remove	
0033U : Vice Chan (Functional Area) 0034U : Sr Vice Chan (Restricted Use)		T Remove All	

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



7. <u>Position Status:</u> 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
	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):

of Date: 03/04	4/2013		Position Rost	er witl	h Salar	y Report (Pos	ition & Incum	bent Data)					Run Run	F Date: 0 Time:	Page 1 of 3 13/04/2013 10:10 AM
Position No./ Empl. ID	Position Eff. Date/ Job Eff. Date	Position Title / Employee Name	Ji C R	ob ode/ od #	EE Stat	Reports to Position / Supervisor ID		FTE / Appt Type	нс	Total Position FTE	Total / Job FTE	O/A Scl	SAP	Grd	2 Step	Annized Rate
	Po	sition Data						Jo	b Data							
	Position No. Position Eff. Da Position Title Job Code Reports to Posit FTE HC Total Position F	tte tion TE	Position Number Position Effective Date Position Tifle Job Code Report to Position ID Position FTE Max Head Count Position FTE x Head Cou	nt			Em Job Em Roi EE Suy App Tot O/A SAI Gro Ste Ste Ann	npl. ID b Eff. Date inployee Nam d# Stat pervisor ID pt Type Ial / Job FTE A Sci P d sp nlzed Rate	e	Employ Job Ef Employ Employ Superv Appoin Sum o' Off/Ab Salary Salary Salary Salary	yee ID fective Dai yee Name yment Rec yment Rac yment Stat visor Emplo tment Type f all Job FT sove Scale Administra Grade Step lized Rate o	te us yee ID an e E / Indivik Code tion Plan f Pay	er Id Name dual Job F	TE		
Selection (Criteria:		3													
As of Date:	03/04/201	3	0													
Org Node:							Parent Org No	de: KG	ACS							
Position Nu	umber:						Position Statu	s: Va Ov	cant Po renfilled	osition, F I Position	Filled Pos I, Non-Fi	sition, F FE Posi	^o artially tion	Filled P	'osition,	
Job code :							Employment	Status: A	, L, P							

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

As of Date: 03/04/2	2013	Position Roster with Salary Report (Position & Incumbent Data)						Run Date: Run Time:		Page 2 of 3 03/04/2013 10:12 AM				
Bosition No./ Empl. ID	Position Eff. Date/ Job Eff. Date	Position Title / Employee Name	Job Code/ Rod #	C EE Stat	Reports to Position / Supervisor ID	9 FTE / Appt Type	10 HC	Total Position FTE	Total / Job FTE	13 O/A Sol	14 SAP	15 Grd	16 Step	Annized Rate
Position Dept: A Position Ora No Filled Position	cademic Se de: KGACS	enate (KGACS) SAcad Senate Ops (10160)	1											
3000134608	12/01/2012	Executive Advisor 4	0554U		00010748	1.00	1	1.00	1.00					
21-0302-0302	12/01/2012	Dears Rush, Andrea Max	0	Α	(1012000) - Masketh Zinkards	2			1.00		184227	28		\$115,007.00
0000010200200	12/01/2012	Project/Policy Analyst 5	0566U		00001104608	1.00	1	1.00	1.00					
2112270170000	12/01/2012	Song Linde H	0	Α	(1100000) - Dream Rush	2			1.00		14127	24		BMT AUX-380
(2000) + 4200(1277	12/01/2012	Assistant III	4722C		(IIII)+(Sec(III)	1.00	1	1.00	1.00					
(21-)27-27-960	12/01/2012	Kussik Marilyn	0	А	(1-REPART - Dream Rush)	2			1.00		(DK		18	\$24,338.30
300011-0002198	12/01/2012	Administrative Officer 2	7376U		000113468	0.50	1	0.50	0.50					
21-1208077220	12/01/2012	Kith, Barria F	2	Α	(1-100200) - (Dearn Rush	2			0.50		1955	10		\$55,300.00
(1000) + (100000)	12/01/2012	Project/Policy Analyst 2	7397U		0000210808	1.00	1	1.00	1.00					
(1+(1+(12)mm)2)	12/01/2012	(Dream, Jamica E	0	A	(11117324772 - Larsen	2			1.00		P35	10		\$15, ALL 10
00011221MB	12/01/2012	Project/Policy Analyst 2	739711		100112408	1.00	1	1.00	1.00					
0100000000	12/01/2012	Trans. Anilla 1		A	(1-1002002) - Grant Rush	2	1		1.00		P55	10		8877 2086-000

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