# **Position Control Application in PeopleSoft**

# **Overview:**

The Position Control Application provides reports to manage recurring personnel costs and associated funding. It provides an easy way to pull together HR position related data and Financial System salary budget data.

# Security:

There is a security role for the Position Control Application in SAR. Due to HR sensitive data, HR Deptid (OUC) security level access is required.

Description: 2014 Position Control App Long Description: This is the new Position Control App as of 2014, built in PeopleSoft rather than Excel.

# Navigation:

If a user has access to Position Control, they will have a Position Control tile on the HR System Home Page and the HR Dashboard.







When you click on the Position Control tile, it will open to the Position Control Work Center and the Position Control Report menu on the left as seen below.

HR System Homepage		Position Control Work Center				
📄 Pos Ctl Summary-Current Y. ar	Position Control Summary - Current	Year				
Pos Ctl Summary-Future Year	▼ Filter Selection *Subset Data: Org ✓	Select Accounts	Select Fu	nd Codes		
High Level Summary-Future Year	Org ID:	✓ 5111x    ✓ 5121x    ✓ 5131x    ✓ 5120x     Go    Clear	16030	✓ 16031	✓ 16032 Aux) OR	<ul> <li>✓ 91000 (F &amp; A)</li> <li>✓ 91000 (Oth incl Aux)</li> </ul>
HR Position Detail Extract	Enter the filter data and click Go.					
HR Assignment Detail Extract						
FIN Budget Detail Extract						
Vacant Positions						
Project Positions Rpt by Dept						

You will choose the report you would like to run from the menu (See Appendix A for report details):

- ٠ Pos Ctl Summary-Current Year
- Pos Ctl Summary-Future Year
- High Level Summary-Future Year
- HR Position Detail Extract
- HR Assignment Detail Extract

(to run separately; detail also available in Pos Ctl Summary Reports)

- (to run separately; detail also available in Pos Ctl Summary Reports) (to run separately; detail also available in Pos Ctl Summary Reports)
- FIN Budget Detail Extract • Vacant Positions

•

• Project Positions Rpt by Dept

#### **Position Control Summary-Current Year:**

This report is a summary of Financial System salary budget data and HR Position Budget data for the current fiscal year. It provides a tool to assist you in managing your personnel commitments against your current year budget (includes both continuing and one-time).



## **Filter Selection:**

Subset Data:

- By Deptid - the Department ID in HR on the position/employee that is considered as owner of position/employee.
- By Org the Department ID setup on the project to indicate owner of project/funding. •
- By Project the project from which the position/employee is being funded. •
- You may enter up to 6 digits for Deptid or Org and up to 12 digits for Project-phase. •

As of Date: Defaults to end of prior month. You can enter or select another date but it cannot be greater than current date.

Select Accounts:

- 1 or more allowed
- 5111x (EPA Non-teaching)
- 5121x (SPA Employees)
- 5131x (EPA Teaching)
- 5120x (Law Enforcement Officers)

Select Fund Codes:

- 1 or more allowed
- 16030 (Academic Affairs)
- 16031 (Agricultural Research)
- 16032 (Cooperative Extension)
- 91000 (F&A) 91000-Overhead (F&A)
- 91000 (Aux) selection to only pull auxiliaries
- 91000 (Oth incl Aux) 91000 Trust Funds
  - NOTE: This includes auxiliaries so 91000 (Aux) & 91000 (Oth incl Aux) cannot both be selected.

After all filter data is entered/selected, click Go to run report.

Click Clear to clear all filter selections and re-select.

### Example of Report on Screen:

Summary line: On far right, it tells you how many rows of data. Default is 10 lines of data are shown. Click arrow after the data count (1 of 10 of 76 in the example below) to page through list, or Click "View All" to display all lines of data, or Click "View 10" to change back to only show 10 lines.

ubset Data: O	rg	~	Select Accounts			Select	Fund Co	des				
			🗹 5111x 🛛 5121x	🗹 5131x	<b>5120</b> x	<mark>🗹</mark> 1603	80 🗹 16	6031 🗹 16032	🗹 91000 (F & A)		<	
s Of: 02	2/28/2021		Go	Clear			91	000 (Aux) OR	✓ 91000 (Oth incl Aux)			
									7		$\mathcal{A}$	
Summary	_								Personalize Find Vi	ew All 🔛 🚺	First ④ 1-10 of 78	5 🕟 La
Fin Budget - 42	HR Position - 58	HR Assign - 62										
DEPT		PT NAME	АССТ	PROJ	Fund	Class	PGM	Auxiliary Code	Aux Code Descr	Fin CN/CY Bud FTE	Fin CN/CY Bud Amt	FIN Buc Details
1	College of		5111x		16030	212	101			4.20	\$599,324	
2	College of		5111x		16030	212	101			0.00	\$8,695	
3	College of		5111x		16030	212	102			0.00	\$2,277	C
4	College of	<b>`</b>	5111x		16030	212	110			2.38	\$116,647	Ē,
5	College of		5111x		16030	212	152			2.31	\$313,364	Ē,
3	College of	$\mathbf{A}$	5111x	\	91000	3410	142			0.00	\$0	
1	College of		5111x	$\backslash$	91000	262	110			0.00	\$0	
3	College of	$\backslash$	5111x		91000	262	110			0.00	\$6,624	¢
9	College of	$\backslash$	5111x		91000	62	152			0.00	\$0	
	College of	· · ·	5111X	\ \	91000	62	152			0.00	50	

Data is displayed on tabs: Fin Budget, HR Position, and HR Assign. You can click on each tab. The number following the tab name is the number of records returned with data.

- Fin Budget tab contains the total FTE and amount of the continuing budget (CN) entries, as well as one-time (CY) budget entries, for salary accounts for the current year for the specified Dept, Org, or Project.
- HR Position tab contains the total FTE and budget amount of positions, both vacant and filled positions, assigned to the specified Dept, Org, or Project.
- HR Assign tab contains the total FTE and amount of employees assigned, both from filled positions and other assignments, to the specified Dept, Org, or Project.

**TO SEE SUMMARY OF ALL TABS/COLUMNS TOGETHER:** Click on button next to tabs to "Show All Columns". TO GO BACK TO SEE INDIVIDUAL TABS/COLUMNS: Click again on this button.

#### SUMMARY OF ALL TABS/COLUMNS TOGETHER (Position Control Summary-Current Year Report):

nt Year																				
Se	lect Accounts			Selec	t Fund C	odes														
	25111x ₹5121x	<b>5131x</b>	<b>5120x</b>	2 16	030 🔽	16031	✓ 16032 ✓ 91	000 (F & A)												
	Go	Cle	ər			91000 (A	ux) OR 🗹 91	000 (Oth incl Aux)												
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	ACCT	P	ROJ F	und	Class	PGM	Auxiliary Code	Aux Code Descr		Fin CN/CY Bud FTE	Fin CN/CY Bud Amt	FIN Budg Details	HR Pos FTE	HR Pos Amt	HR Posn Details	Reserve FTE	Reserve Amount	HR Assign FTE	HR Assign Amt	HR Assgn Details
	5111x		160	30 21	12 1	01				4.20	\$599,324	<b>D</b>	5.45	\$600,281	-	7 -1.25	7 \$-957	5.45	\$600,281	
	5111×		160	30 21	12 1	01				0.00	\$8,695		0.12	\$12,000	· • /	-0.1	\$-3,305	0.12	\$12,000	
	5111x		160	30 21	12 1	02				0.00	\$2,277	<b>b</b>	0.00	\$0	_ /	0.00	\$2,277	0.00	\$0	
	5111x		160	30 21	12 1	10				2.38	\$116,647	-	2.90	\$171,646	P	-0.52	\$-54,999	2.00	\$117,000	<b>D</b>
	5111x		160	30 21	12 1	52				2.31	\$313,364		2.19	\$259,153	/ 🖻	0.12	\$54,211	2.19	\$259,154	Ð
	5111x		910	100 34	410 1	42				0.00	\$0		0.10	\$6,305	6	-0.10	\$-6,305	0.00	\$0	
	5111x		910	00 26	52 1	10				0.00	\$0		0.95	\$46,233	=	-0.95	\$-46,233	0.20	\$12,483	¢
	5111x		910	100 26	52 1	10				0.00	\$6,624		0.00	50		0.00	\$6,624	0.00	\$0	-
	5111x		910	00 62	2 1	52				0.00	\$0		0.25	\$15,000	1	-0.25	\$-15,000	0.25	\$15,000	
	5111x		910	62	2 1:	52				0.00	\$0		0.12	\$8,625	/ =	-0.12	\$-8,625	0.12	\$8,625	9
				<ul> <li>Total</li> </ul>	ls									/ /						
				Fin Bud	FTE:	101.65	Fin E	Bud Amt:	\$8,545,480											
				HR Pos	FTE:	107.23	HR P	los Amt:	\$9,175,553											
				Reserve	FTE:	-5.58	Rese	erve Amt:	\$-630,073											
				HR Assi	ign FTE:	133.73	HRA	ssign Amt:	\$9,536,679					/						
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			/		Fin	CN	I/CY Bud	d Amt – ⊢	IR Pos	Amt = Re	eserve An	nt 🖊								
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Posit	ivo rocor	vestr	ndicat	o th	at th	ه F	inancial	Rudget a	haarve	s the HR	Position	Rude		ative rec	orvo	s indicate	that the H	IR		
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Posit	ion Budg	get <i>j</i> ex	cess t	he F	Finar	ncia	l Budget	t. To clea	ar nega	tive rese	erves, furi	ther a	analysis	may be r	าeed	ed to det	ermine if b	oudget		
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FIN B	udget cø	nsists	s or al	1 <u>COI</u>	ntint	ung	(CN) ar	iu one-tii	me (CY	1 buaget	entries f	rom	Financia	ais, and si	noul	a match V	wks report	S.		

Auxiliary code and Auxiliary Code Description are shown if Fund Code 91000 (Aux) is selected.

**Totals:** <sup>/</sup> The box at the bottom displays summary totals of FTE and Amount columns. Reserve totals are only shown if run by ORG or Project. You can collapse this box by clicking on down arrow in front of Totals.

To see details of the data that make up the totals: Click on FIN Budg Details button, or HR Posn Details button, or HR Assign Details button. Details will display in separate box under summary data.

**Fin Budg Details:** Shows the detail budget entries from Financial System that make up the total Fin CN/CY Bud FTE and Fin CN/CY Bud Amt for that project and account.

Subset Da	ta: Org	~	Select Accounts			Select Fu	nd Codes											
Ora ID:	XX		🗹 5111x 🛛 5121	x 🗹 5131x	<b>5120x</b>	<b>16030</b>	16031	<b>16032</b>	91000	0 (F & A)								
As Of:	02/28/2021		Go	Clear			91000	(Aux) OR	91000	(Oth incl Aux)								
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Я <b>п</b>													Ethi Deute			ND Deep		
DE	EPT	DEPT NAME	ACC	T PRO	J Fun	d Clas	B PGM	Auxiliary Co	de /	Aux Code Descr	Fin CN/CY Bud FTE	Fin CN/CY Bud Amt	Details	HR Pos FTE	HR Pos Amt	Details	Reserve FTE	Reserve Am
1	College of Design		5111x		16030	212	101				4.20	\$599,324		5.45	\$600,281		-1.25	
2	College of		5111x		16030	212	101				9.00	\$8,695	<b>C</b>	0.12	\$12,000	<b>C</b>	-0.12	
3	College of		5111x		16030	212	102				0.00	\$2,277	Ċ	0.00	\$0		0.00	
4	College of		5111×		16030	212	110				2.38	\$116,647	-	2.90	\$171,646	<b>C</b>	-0.52	
5	College of		5111x		16030	212	152				2.31	\$313,364	<b>D</b>	2.19	\$259,153	<b></b>	0.12	
6	College of		5111x		91000	3410	142				0.00	\$0		0.10	\$6,305		-0.10	
7	College of		5111×		91000	262	110				0.00	\$0		0.95	\$46,233	<b>C</b>	-0.95	
8	College of		5111x		91000	262	110				0.00	\$6,624	Ċ	0.00	\$0		0.00	
9	College of		5111x		91000	62	152				0.00	\$0		0.25	\$15,000	<b>C</b>	-0.25	
10	College of		5111x		91000	62	152				0.00	\$0		0.12	\$8,625	<b>C</b>	-0.12	
Financial	Budget																	
Departm	ent Doord		Account	Project/Grant	Fund Code	Class	Program Code	Statistics Sta Code An	atistic	Monetary Amount Journal Da	e Line# GL Jo	urnal ID Reference		Lin	e Descr		Ledger Gros	ар Ор
1	College of		5111x		16030	212	152		0.00	\$-593.00 12/22/2020	37 000		2nd Q	r Budget Revision		CY23	BD_ACTUALS	3
2	College of		5111x		16030	212	152 F	TE	0.00	\$31,114.00 10/26/2020	2 000	)	Abolis	h pot		CN24	BD_ACTUALS	3
2	College of		5111x		16030	212	152 F	TE	2.31	\$282,843.00 07/01/2020	1292 BEGB	D16030 16030BEGBD	16030	BEGINNING BUD	GET LOAD	CN26	BD_ACTUALS	VD44
5.5860 seco	nd(s)				-	Totale												
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HR Posn Details: Shows the list of filled and vacant positions that make up the total HR Pos FTE and HR Pos Amt for that

Subset Dat	a: Org	~	Select A	Accounts		3	elect Fun	d Codes													
Org ID:	XX		5111	1x 🗹 5121x 🗹	5131x 2512	20x	<b>16030</b>	16091	16032 910	000 (F & A)											
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DE	PT	DEPT NAM		ACCT	PROJ	Fund	Class	PGM	Auxiliary Code	Aux Code	Descr		Fin CN/C	Y Bud FTS Fin Cl	N/CY Bud Amt	Details	HR Pos FTE	HR Pos Amt	Details	Reserve FTE	Reserve Amo
1	Coll	ege of		Number         Early         Early <t< td=""></t<>																	
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5	Coll	Note:         Product Accounts         Product Account Accoun																			
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0	Coll	Image: Control of the control of th																			
0	Coll	ege of		51112		91000	62	152						0.00	\$0,024	1	0.00	\$15,000	(The	-0.25	
10	Coll	ege of		5111x		91000	62	152						0.00	\$0		0.12	\$8,625	6	-0.12	
IR Positio	on Detail																				
DEPT (O	UC)	DEPT NAME	OF	RG (FUNDING SOURC	CE) OF	RG DEPT N	AME	ACC	r PROJ	Fund	Class	PGM	POS NBR		POST	L	HR P	D8 HR Pos Amt	Effdt	Eff Seq	Distrb % Over
1 (					College of			5111x		16030	212	152		Exe Dir-College	Advancement		0	.26 \$33,2	20 07/01/2020	0	25.554 N
2					College of			5111x		16030	212	152		Asst Dean-Fina	nce & Admin		C	.57 \$62,8	73 07/01/2020	0	56.763 N
	-				College of			5111X		16030	212	152		Assoc Director			1	.30 \$98,0	00 07/01/2020	0	30 10 000 N
					oonogo or			01111		10000		101		10000010000				000,0			100.000 11
3.5860 secor	d(s)						otais														
						Fin	Bud FTE:	101.65	Fin Bu	ud Amt:		\$8,545,48	0								
						HR	Pos FTE:	107.23	HR Po	os Amt:		\$9,175,55	3								
						Res	erve FTE:	-5.58	Reser	ve Amt:		\$-630,07	3								
								-													

# **HR Assgn Details:** Shows the list of employees, both filled positions and other assignments that make up the total HR Assign FTE and HR Assign Amt for that project and account.

Select Accou	nts		Select	Fund	Codes					_		-												
🗹 5111x 🛛 🗹	5121x 🗹 513	1x 🗹 5120x	2 160	30	46031	<b>16032</b>	91000	(F & A)				_	~											
Go		Clear			91000 (A	ux) OR	91000	(Oth incl	Aux)					-	_									
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	ACCT	PROJ F	und (	Class	PGM	Auxiliary Co	xde .	Aux Code	Descr		Fin Cl	N/CY Bud FTE	Fin CN/CY Bud	Amt	FIN Budg Details	HR Pos FTE	HR Pos Amt	HR Post	Peserve FTE	Reserve Amount	HR Assign FTE	HR Assign Amt	HR A	ssg
5111	1x	160	30 212	2	101							4.20	\$59	9,324		5.45	\$600,281		-1.25	\$-957	5.45	\$600,2	81	6
5111	1x	160	30 212	2	101							0.00	ş	8,695		0.12	\$12,000	6	-0.12	3-9,205	0.12	\$12,0	00	þ
5111	1x	160	30 212	2	102							0.00	s	2,277	<b>—</b>	0.00	\$0		0.00	\$2,277	0.00		<b>S</b> 0	
5111	1x	160	30 212	2	110							2.38	\$11	6,647	<b>—</b>	2.90	\$171,646	Þ	-0.52	\$-54,999	2.00	\$117.0	sQ 🗖	þ.
5111	1x	160	30 212	2	152							2.31	\$31	3,364	-	2.19	\$259,153	-	0.12	\$54,211	2.19	\$259,1	A 🖡	5
5111	1x	910	00 34	10	142							0.00		\$0		0.10	\$6,305		-0.10	\$-6,305	0.00		50	-
5111	1x	910	00 262	2	110							0.00		\$0		0.95	\$46,233	6	-0.95	\$-46,233	0.20	\$12,4	83	b
5111	1x	910	00 262	2	110							0.00	S	6,624	<b>C</b>	0.00	\$0		0.00	\$6,624	0.00		\$0	
5111	1x	910	00 62		152							0.00		\$0		0.25	\$15,000	Þ	-0.25	\$-15,000	0.25	\$15,0	00	þ.
5111	1x	910	00 62		152							0.00		\$0	_	0.12	\$8.625	Þ	-0.12	\$-8,625	0.12	\$8,6	25	Þ.
_												HR Assign	HR Assign						EME			EMPI	_	_
ORG (FUN	IDING SOURCE)	U	G DEPT NA	AME		ACCI		PROJ	Fund	Class	PGM	FTE	Amt	US NBH	< W/A		POSTIL		RCI	) Name	Endt	STATUS	JOBCODI	-
		college of I				5111X			16030	212	152	0.26	\$33,220		No	Exe Dir-College	Advancement			0	07/01/2020	Active	040400	_
		College of I				5111X			16030	212	152	0.50	\$62,973		No	Acet Dean-Einen	nce & Arlmin			0	07/01/2020	Active	010125	
		COURGE OF C				5111x			16030	212	152	1.00	\$65,000		No	Assoc Director				0	0110112020	Active	C210U	j
								-																
			Totals     ■	5																				
			Fin Bud I	FTE:	101.65		Fin Bud	Amt:		\$8,545,	480													
			HR Dos F	ETE:	107.22		HR Pos	Amt:		\$9 175	553													

#### To download Position Control Summary report data to Excel:

- On Summary line, click on the green spreadsheet button on right hand side.
- It will download the data for whatever tab you are sitting on (Fin Budget, HR Position, HR Assign, or Summary of All Tabs/Columns).
- To download All Tabs/Columns of Summary data, make sure you have clicked on the button to "Show All Columns" before clicking on the green spreadsheet button.
- Totals do not download to Excel. That allows user to create their own totals within Excel.
- To download details of data, click on button for Fin Budget Details, HR Position Details or HR Assign Details, then go to top of details box (dark gray line), click green spreadsheet button on far right.
- Once Excel opens, the following warning message will appear:

Microsoft Excel		X
The file you are trying to open, 'ps.xls', is is before opening the file. Do you want to op	in a different format than specified by the file extension. Verify that nen the file now?	t the file is not corrupted and is from a trusted source
	Yes No Help	

Click "Yes" to open the file. This is due to the current version of PeopleSoft reporting tools creates these spreadsheets with an 'xls' type instead of 'xlsx'.

# **Position Control Summary-Future Year:**

This report is a summary of Financial salary budget data and HR Position Budget data for the <u>future</u> fiscal year. It provides a tool to assist you in managing your personnel commitments against your permanent budget for the upcoming fiscal year (includes both continuing and future continuing). **This report is the one used most commonly to check for negative reserves.** 



#### **Filter Selection:**

Subset Data

- By Deptid the Department ID in HR on the position/employee that is considered as owner of position/employee.
- By Org the Department ID setup on the project to indicate owner of project/funding.
- By Project the project from which the position/employee is being funded.
- You may enter up to 6 digits for Deptid or Org and up to 12 digits for Project-phase.

As of Date: Defaults to 7/1 of future fiscal year.

Select Accounts:

- 1 or more allowed
- 5111x (EPA Non-teaching)
- 5121x (SPA Employees)
- 5131x (EPA Teaching)
- 5120x (Law Enforcement Officers)

Select Fund Codes:

- 1 or more allowed
- 16030 (Academic Affairs)
- 16031 (Agricultural Research)
- 16032 (Cooperative Extension)
- 91000 (F&A) 91000-Overhead
- 91000 (Aux) selection to only pull auxiliaries
- 91000 (Oth incl Aux) 91000 Trust Funds
  - NOTE: This includes auxiliaries so 91000 (Aux) & 91000 (Oth incl Aux) cannot both be selected.

After all filter data is entered/selected, click Go to run report.

Click Clear to clear all filter selections and re-select.

## **Example of Report on Screen:**

Summary line: On far right, it tells you how many rows of data. Default is 10 lines of data are shown. Click the arrow to page through list, or Click "View All" to display all lines of data, or Click "View 10" to change back to only show 10 lines.

	. Ora	~	Select Accounts			Select F	und Coo	les				
ubset Data	: [0]g	•	✓ 5111x ✓ 5121	x 🗹 5131x	<b>5120x</b>	<b>1603</b>	0 216	031 🔽 16032	91000 (F & A)	<u> </u>		
rg ID:	XX						01	OOD (Aux) OR	91000 (Oth incl Aux)			
s Of:	07/01/2021		Go	Clear			0.91	000 (Aux)				
Summa	D/								Personalize   Eind   Via	WAILI 🖓 L 🔽	First (4) 1 10 of 6	5 🔊 Laet
n Rudgot	17 UR Pasition	E HD Assign 61							reisonalize [ rind ] vie		1110010.	, Cast
DEP		DEPT NAME	ACCT	PRO.J	Fund	Class	PGM	Auxiliary Code	Aux Code Descr	Fin CN/FY Bud FTE	Fin CN/FY Bud Amt	FIN Budg
	College of		1111		16020	212	101	,		4.20	\$640.291	Details
	College of		511		16030	212	101			4.20	5040,201	
	College of	、	5111x		16030	212	110			2.38	\$116.647	6
	College of	$\backslash$	5111x		16030	212	152			2.30	\$313.057	
	College of		5111x		91000	3/10	142			0.00	\$0	
	College of		5111x		91000	262	110			0.00	50	
	College of		5111x		91000	62	152			0.00	50	
	College of	\	5111x		91000	62	152			0.00	\$0	
	College of	\	5111x		91000	62	152			0.00	\$0	
	College of		5121x		16030	212	101			14.35	\$759,766	<b></b>
						- Totale						
750 second	l(s)	\				+ Iotaia						
			<b>`</b>			Fin Bud Fi	re: 1	01.38	Fin Bud Amt: \$	8,344,402		
			$\backslash$			HR Pos FT	'E: 1	07.35	HR Pos Amt: \$	9,186,101		
			\			Reserve F	TE:	-5.97	Reserve Amt:	5-841,699		
			\				FTE: 1	24.24	HR Assign Amt:	0.564.524		

Data is displayed on tabs: Fin Budget, HR Position, and HR Assign. You can click on each tab. The number following the tab name is the number of records returned with data.

- Fin Budget tab contains the total FTE and amount of the continuing budget (CN) entries, as well as any future year (FY) budget entries, for salary accounts for the specified Dept, Org, or Project.
- HR Position tab contains the total FTE and budget amount of positions, both vacant and filled positions, assigned to the specified Dept, Org, or Project.
- HR Assign tab contains the total FTE and amount of employees assigned, both from filled positions and other assignments, to the specified Dept, Org, or Project.

**TO SEE SUMMARY OF ALL TABS/COLUMNS TOGETHER:** Click on button next to tabs to "Show All Columns". TO GO BACK TO SEE INDIVIDUAL TABS/COLUMNS: Click again on this button.

#### SUMMARY OF ALL TABS/COLUMNS TOGETHER:

electio	n																			
. Org		~	Select Accounts			Select Fun	nd Codes													
xx			🗹 5111x 🛛 5121x	: 🗹 5131x 🗹	5120x	<b>16030</b>	<b>16031</b>	🗹 16032 🛛 🗹 91	000 (F & A)											
07/0	1/2021 🕫		Go	Clear			91000 (	Aux) OR 🗹 91	000 (Oth incl Aux)											
ry																		Personalize   Find   Vie	ew All   🖾   🔣	First 🛞
т		DEPT NAME	ACCT	PROJ	Fun	d Class	PGM	Auxiliary Code	Aux Code Descr		Fin CN/FY Bud FTE	Fin CN/FY Bud Amt	FIN Budg Details	HR Pos FTE	HR Pos Amt	HR Posn Details	Reserve FTE	Reserve Amount	HR Assign FTE	HR Assign
	College of		5111x		16030	212	101				4.20	\$640,281	<b>_</b>	5.45	\$600,281	D 7	1 -1.25	\$40,000	5.45	56
	College of		5111x		16030	212	101				0.00	\$0		0.12	\$12,000	<b>b</b> /	-9/12	\$-12,000	0.12	S
	College of		5111x		16030	212	110				2.38	\$116,647	<b></b>	2.90	\$171,646	1	-0.52	\$-54,999	2.00	S1
	College of		5111x		16030	212	152				2.31	\$313,957	<b></b>	2.19	\$259,153	/ 🖻	0.12	\$54,804	2.19	\$2
	College of		5111x		91000	3410	142				0.00	50		0.10	\$6,205	<b>C</b>	-0.10	\$-6,305	0.00	
	College of		5111x		91000	262	110				0.00	\$0		0.95	\$46,233	- <b>b</b> /	-0.95	\$-46,233	0.20	S
	College of		5111x		91000	62	152				0.00	\$0		0.25	\$15,000	×	-0.25	\$-15,000	0.25	S S
	College of		5111x		91000	62	152				0.00	\$0		0.12	\$8,625		-0.12	\$-8,625	0.12	
	College of		5111x		91000	62	152				0.00	\$0		0.25	\$15,000	<b></b>	-0.25	\$-15,000	0.25	S S
	College of		5121x		16030	212	101				14.35	\$759,766	<b></b>	5.86	\$21,776	<b>C</b>	0.49	\$37,990	13.86	\$7
Ks)						Totals								/	/					
					Fi	in Bud FTE:	101.38	Fin E	Bud Amt:	\$8,344,402				/ /	/					
					н	R Pos FTE:	107.35	HR P	os Amt:	\$9,186,101										
					R	eserve FTE:	-5.97	Rese	rve Amt:	5-841.699			/							
					н	D Assign FT	E: 124.24	HDA	eeian Amt-	20 564 524				/						

Reserve columns: These are only shown if run by ORG or Project. Reserves are calculated as follows:

Fin CN/CY Bud FTE – HR Pos FTE = Reserve FTE Fin CN/CY Bud Amt – HR Pos Amt = Reserve Amt

Positive reserves indicate that the Financial Budget exceeds the HR Position Budget. Negative reserves indicate that the HR Position Budget exceeds the Financial Budget. To clear negative reserves, further analysis may be needed to determine if budget revisions are needed in Financials or if salary distribution changes are needed in HR.

Fin Budget consists of all continuing (CN) and future year (FY) budget entries from Financials, and should match WRS reports.

Auxiliary Code and Auxiliary Code Description are shown if Fund Code 91000 (Aux) is selected.

**Totals:** 'The box at the bottom displays summary totals of FTE and Amount columns. Reserve totals are only shown if run by ORG or Project. You can collapse this box by clicking on down arrow in front of Totals.

To see details of the data that make up the totals: Click on FIN Budg Details button, or HR Posn Details button, or HR Assign Details button. Details will display in separate box under summary data.

**Fin Budg Details:** Shows the detail budget entries from Financial System that make up the total Fin CN/FY Bud FTE and Fin CN/FY Bud Amt for that project and account.

Filter Sele	ection				~														
Subset Data:	Org 🗸		Select Accounts			Select Fu	nd Codes												
Ora ID:	XX		🗹 5111x 🛛 5121x	🗹 5131x	<b>5120x</b>	<b>16030</b>	16031	<b>16032</b>	🗹 91000 (F & A)										
As Of:	07/01/2021		Go	Clear			91000	(Aux) OR	91000 (Oth incl Aux	)									
Summary	(																	1	Personalize   Find
(f):*																			
DEPT	DE	EPT NAME	ACCT	PRO.	J Fur	d Clas	s PGM	Auxiliary Co	de Aux Code Desc	r	Fin CN/FY Bud F	TE Fin CN/FY B	ud Amt	FIN Budg Details	HR Pos FTE	HR Pos Amt	HR Posn Details	Reserve FTE	Reserve Amount
1	College of		5111x		16030	212	101				4	20 \$	640,281	<b>C</b>	5.45	\$600,281	ē	-1.25	\$40,0
2	College of		5111x		16030	212	101				0	00	\$0		0.12	\$12,000	6	-0.12	\$-12,0
3	College of		5111x		16030	212	110				2	38	116,647	<b>D</b>	2.90	\$171,646	<b>6</b>	-0.52	\$-54,9
4	College of		5111x		16030	212	152				2	.31 \$	313,957		2.19	\$259,153	<b>6</b>	0.12	\$54,8
5	College of		5111x		91000	3410	142				0	.00	\$0	han a start	0.10	\$6,305	<b>6</b>	-0.10	\$-6,3
6	College of		5111x		91000	262	110				0	.00	\$0		0.95	\$46,233	<b>6</b>	-0.95	\$-46,2
7	College of		5111x		91000	62	152				0	.00	\$0		0.25	\$15,000	<b>6</b>	-0.25	\$-15,0
8	College of		5111x		91000	62	152				0	.00	\$0		0.12	\$8,625	<b></b>	-0.12	\$-8,6
9	College of		5111x		91000	62	152				0	.00	\$0		0.25	\$15,000	<b></b>	-0.25	\$-15,0
10	College of		5121x		16030	212	101				14	.35 \$	759,766	Ē.	13.86	\$721,776	<b></b>	0.49	\$37,91
Financial Bu	Idget																		
Department	Descriptio	n	Account	Project/Grant	Fund Code	Class	Program Code	Statistics St Code Ar	atistic Monetary nount Amount	Journal Date	Line # GL	Journal ID	Reference		Lin	e Descr	Sce	enario Ledger Gr	oup Openo
4	College of		5111x		16030	212	152	TE	0.00 \$31,114.00	10/26/2020	2 00			Abolis	n posi		CN24	BD_ACTUA	LS
2	College of		5111x		16030	212	152	TE	2.31 \$282,843.00	07/01/2020	1292 BE	GBD16030 1603	OBEGBD	16030	BEGINNING BUDG	3ET LOAD	ONICO	LO_NOTOX	LS KDWALLIN
7.1750 second(s	5)					Totals													
					F	in Bud FTE	: 101.3	8	Fin Bud Amt:	\$8,344,402	2								
					н	R Pos FTE	: 107.3	5	HR Pos Amt:	\$9,186,101									
					R	eserve FTE	-5.9	7	Reserve Amt:	\$-841.699	,								
						D Assign D			UD Assiss Amt										

# **HR Posn Details:** Shows the list of filled and vacant positions that make up the total HR Pos FTE and HR Pos Amt for that project and account.

ection	1					_	~															
Org		~	Select Accounts		S	elect Fun	d Codes	$\sim$														
XX			🗹 5111x 🗹 5121x 🗹	5131x 🗹 51	20x	16030	16031	✓ 16032 ✓ 910	00 (F & A)													
07/01/	/2021 🕅		Go	Clear			🗆 91000 (Ai	ux) OR 🗹 910	00 (Oth Inc	(Aux												
													~							Personalize   Find   \	/iew All 🖉 🛛 🚺	First 🚯 1-10
		DEPT NAME	ACCT	PROJ	Fund	Class	PGM	Auxiliary Code	Aux Code	Descr		Fin CN/F1	Bud FTE Fi	CN/FY Boo Amt	FIN Budg	HR Pos FTE	HR Pos Amt	HR Posn	Reserve FTE	Reserve Amount	HR Assign FTE	HR Assign Am
0	College of		5111x		16030	212	101						4.20	\$640.281	Details	5.45	\$600.28	1 Details	-1.2	5 \$40.00	5.45	\$600
(	College of		5111x		16030	212	101						0.00	\$0		9.12	\$12,00	0 🛅	-0.1	2 \$-12,00	0 0.12	\$12
0	College of		5111x		16030	212	110						2.38	\$116,647		2.90	\$171,64	s 📂	-0.5	2 \$-54,99	9 2.00	\$117
(	College of		5111x		16030	212	152						2.31	\$313,957	<b></b>	2.19	\$259,15	× 👼	0.1	2 \$54,80	4 2.19	\$259,
(	College of		5111x		91000	3410	142						0.00	\$0		0.10	\$6,30	5 🛅	-0.1	0 \$-6,30	5 0.00	
(	College of		5111x		91000	262	110						0.00	\$0		0.95	\$46,23	3 🛅	-0.9	5 \$-46,23	3 0.20	\$12,
0	College of		5111x		91000	62	152						0.00	\$0		0.25	\$15,00	0 🛅	-0.2	s \$-15,00	0.25	\$15,
0	College of		5111x		91000	62	152						0.00	\$0		0.12	\$8,62	5 🛅	-0.1	2 \$-8,62	5 0.12	\$8,
0	College of		5111x		91000	62	152						0.00	\$0		0.25	\$15,00	0 📴	-0.2	\$-15,00	0 0.25	\$15,0
0	College of		5121x		16030	212	101						14.35	\$759,766	<b>D</b>	13.86	\$721,77	6 📴	0.4	9 \$37,99	0 13.86	\$721,
Detail	l.																				Personali	ze   Find   View A
		JEPT NAME	ORG (FUNDING SOUR	CE) (	ORG DEPT I	AME	ACC	T PROJ	Fund	Clas	s PGM	POS NBR		POST	TL.	HR	Pos HR Pos A	mt I	Effdt Eff Seq	Distrb % Act F	iscal Year Aux Code	ype
				College of			5111x		16030	212	152		Exe Dir-Col	lege Advancement			0.26 \$3	3,220 07/01/2	020 0	25.554 N	2021	
-				College of			5111x		16030	212	152		Asst Dean-	Finance & Admin			0.57 \$6	2,873 07/01/2	020 0	56.763 N	2021	
				College of			5111x		16030	212	152		Assoc Direc	tor			1.00 \$6	5,000 07/01/2	020 0	36.162 N	2021	
					T	otals																
)					Ein	Pud ETC.	404.00	Ein P	of America													
						Dee ETE.	101.30	100	a A main		00,044,4	04										
					нк	POSIFIE:	107.35	HRPO	is Amt		59,186,1	01										
						and a second second second	F 0.7	10000	the second se													

HR Assgn Details: Shows the list of employees, both filled positions and other assignments that make up the total HR Assign FTE and HR Assign Amt for that project and account.

Select A	ccounts		S	elect Fund	d Codes					_	~													
5111)	x 🗹 5121x	🗹 5131x 🛛 🗹 5120	x	16030	16031	<b>16032</b>	91000 (F & A)				_	<u> </u>												
	Go	Clear			91000 (/	ux) OR 🗹	91000 (Oth inc	l Aux)						_										
														~	~					<u></u>				
																	_	Personalize   Find   Vi	w All	First 🐠 1-10 d	of 65 🕑 Last			
	ACCT	PROJ	Fund	Class	PGM	Auxiliary Code	Aux Code	Descr		Fin CN/	FY Bud FTE	Fin CN/FY Bud Amt	FIN Budg Details	HR Pos FTE	HR Pos Amt	HR Posn Details	Reserve FTE	Reserve Amount	HR Assign FTE	HR Assign Amt	HR Assgn Details			
	5111x		16030	212	101						4.20	\$640,281	6	5.45	\$600,281	6	-1.25	\$10,000	5.45	\$600,28	11 🛅			
	5111x		16030	212	101						0.00	\$0		0.12	\$12,000	6	-0.12	\$-12,000	0.12	\$12,00	0 🛅			
	5111x		16030	212	110						2.38	\$116,647	- <b>E</b>	2.90	\$171,646	<b></b>	-0.52	\$-54,999	2.00	\$117.00	s 🖻			
	5111x		16030	212	152						2.31	\$313,957		2.19	\$259,153	<b></b>	0.12	\$54,804	2.19	\$259,15	- 🖻			
	5111x		91000	3410	142						0.00	\$0		0.10	\$6,305	-	-0.10	\$-6,305	0.00	5	0			
	5111x		91000	262	110						0.00	\$0		0.95	\$46,233		-0.95	\$-46,233	0.20	\$12,48	13 🛄			
	5111x		91000	62	152						0.00	50		0.25	\$15,000		-0.25	S-15,000	0.25	\$15,00	0 🛄			
	5111X		91000	62	152						0.00	50		0.12	50,025		-0.12	5-0,025	0.12	515.00	io 🖬			
	5121v		16030	212	101						14.35	\$750 766	-	13.86	\$724 776		0.49	\$37,000	13.86	\$721.71				
														10.00										
	INCOME SOL	IRCE)	ORG DE	EPT NAME		ACCT	PROJ	Eurod	Class	PGM	HR Assign	HR Assign POS N	BR W/		POSITI		EMPLID EMP	'L Name	Effet	EMPL	IOBCODE	108.11	Contra	ļ
		College of				5111x		16030	212	152	FTE 0.26	Amt \$33,220	No	Eve Dis-College	Advancement		RCI	0	07/01/2020	Active	369211 Ever	utive Director	12	1
		College of				5111x		16030	212	152	0.36	\$98,061	No	Dean -				0	07/01/2020	Active	C1012S Dear	n -	12	
-		College of				5111x		16030	212	152	0.57	\$62,873	No	Asst Dean-Finar	ice & Admin			0	07/01/2020	Active	C1212U Asst	Dean	12	,
		O clicate of				5111x		16030	212	152	1.00	\$65,000	No	Assoc Director				0	07/01/2020	Active	2101	-corrector	12	
			ΨT	<b>Totals</b>																				
			Fin	Bud FTE:	101.38	Fir	n Bud Amt:		\$8,344,4	102														
			HR	Pos FTE:	107.35	HE	R Pos Amt:		\$9,186,1	01														
			Res	erve ETE:	-5.97	Re	eserve Amt:		S-841.6	99														

To download Position Control Summary report data to Excel: see page 5.

# High Level Summary-Future Year:

The high-level position control summary reports identify differences between Financial Budget and HR Position Budget by Org at a high level without all the detail included in the other Position Control Summaries. Org is the Department ID setup on the project to indicate owner of project/funding. These reports may be useful for various levels (Business Officers, Department Heads, Deans, Provost Office, Budget Office, etc.)

These reports also identify areas that need attention and display ISSUE in red when absolute % is greater than a certain % (currently 5%) for either FTE or Amount. Subtotals can be included and report options are in HTM, PDF, and XLS formats.

▼ Filter		Report Options	
*Report Style: 2 Digits Org	*As Of: 07/01/2021	Format Type: XLS 🗸	Print
*Fund Code: 16030 ~			
Org ID:	Choose Values from Org ID List		
	Go Show Totals		
Enter the filter data and dick Go.			
Filter Selection:			
Report Style (drop down menu):			
By 2-Digits Org			
By 2-Digits Org with Program Code			
By 4-Digits Org			
By 6-Digits Org With Position			
s Of Date: defaults to current date. Use def	ault or enter/select a differer	nt date such as 07/01/xx.	
	·		
und Code: Only one at a time			

Fund Code: Only one at a time

- 16030 (Academic Affairs)
- 16031 (Agricultural Research)
- 16032 (Cooperative Extension)
- 91000 (Overhead (F&A))
- 91000 (Aux) only pulls auxiliaries

Org ID: Department ID setup on the project to indicate owner of project/funding. There are several ways to enter or select Org ID:

MyPack Portal	
High Level Summary - Future Year	
*Report Style:       4 Digits Org       *As Of:       07/01/2021         *Fund Code:       16030       *         Org ID:       Find IP       First I of 1 Im       Choose Values from Org ID List         Go       Show Totals	Format Type: XLS V Print
Enter the filter data and click Go.	

- /Enter Org ID in grid box. The number of digits have to match the Report Style; 2 digits for 2-Digits Org report, 4 digits for 4-Digits Org report, and 6 digits for 6-Digits Org reports.
  - Use + sign to enter more than one Org ID.
  - $\circ$  Use sign to remove more than one previously entered Org ID.

OR •

Use Look Up (magnifying glass) in grid box and select Org ID from list.

- OR •
  - Click on Choose Values from Org ID List.

Once Choose Values from Org ID List is selected, it displays list of Org IDs with descriptions based on HR OUC security access.

rg	ID List			
Filt	er by Org ID:	25	ilter	
Se	lect All Un-se	elect All		
		Personalize	Find   View All   🖾   🚺 First 🕢 1-7 of 7 🕑 Last	
	Selected	Org ID	Description	
1	<ul><li>✓</li></ul>	2501	Libraries	
2		2503	Academic Enhancement-Dh Hill	
3		2510	Directors Office	
4		2513	Facilities	
5	<ul> <li>Image: A start of the start of</li></ul>	2550	NCSU Libraries - Books & Journ	
6		2563	Digital Library	
7		2590	Nc Live	

- Filter by Org ID: You can enter 1 or 2 digits and click Filter to list those beginning with those digits.
- You can click on one or more within the list under "Selected" column.
- You can Select All or Un-Select All.
- Click "View All" to display all lines of data, or Click "View 20" to change back to only 20 lines, or Click the arrow at the end of the count to page through list.
- Click OK after selecting. The Org IDs selected will appear in grid box. It also has count of Org IDs selected.

# MvPack Portal

<ul> <li>Filter</li> </ul>							Report Options	
Report Style:	4 Digits Org	_	~	*As Of:	07/01/2021	H)	Format Type: XLS V Print	
*Fund Code:	16030 🗸	·					1	
Org ID:	Find 🛛 🗖	First 🕚 1	-2 of 2	Choose	Values from Org	ID List	/'	
	2501			Go	Show	v Totals		
	2301			1	7			
	2550	Q		1./				
			1	$\sim$				
Enter the filter	data and click C	3o.	$\geq$					
		-						

Show Totals: Remove the check/from the box and the totals will not display on the report. Default is to show totals.

- Subtotals depend on Report Style selected:
  - 2 Digits Org Subtotals by 2-Digit Org 0 0
  - By 2-Digits Org With Program Code Subtotals by Account, then by 2-Digit Org By 4-Digits Org Subtotals by 4-Digit Org 0
  - By 6-Digits Org Subtotals by Account, then by 6-Digit Org 0
- By 6-Digits Org With Position Subtotals by Fund/Acct/Project, then by 6-Digit Org Grand Totals are included on all high-level reports if Show Totals box is checked.
- •

# After filter data is entered/selected:

- Click Go to display report on screen. •
  - NOTE: If more than 100 Org IDs are selected, the report cannot be displayed on screen and Report Options-0 Print has to be used

OR

•

- Select Report Options  $\frac{1}{2}$  select Format Type to download into HTM, PDF, or XLS.
- Click Print. .
- You can also select Report Options after viewing report on screen. •

NOTE: If you go back and change the Fund Codes or Org IDs, you have to click Go or Print again to re-run the report.

#### Report Example by 2-Digits Org:

High Level	Summa	ary - Fu	iture Year												
Tilter						F	Report Opt	ions							
*Report Style:	2 Digits Org	9	~	*As Of: 07	/01/2021 関		Format Ty	pe: XLS	· F	rint					
*Fund Code:	16030	~					-								
Org ID:	Find 🛛 🔮	키 Firs	t 🕚 1 of 1 🕑 Last	Choose Value	es from Org II	<u>) List</u>									
		Q	± =	Go	Show 🗹	<b>Totals</b>									
Total number	of record(s)	): 3													
												Personalize   I	Find   🗖   🗴	First 🔞	1-5 of 5 🛞 Last
Title	C	Drg ID	Org ID Description		Fund Code	Account	Fin CN/FY Bud FTE	Fin CN/FY Bud Amt	HR Pos FTE	HR Pos Amt	FTE Difference	Amount Difference	FTE % Difference	Amount % Difference	Needs Attention
1	1		College of		16030	5111x	8.89	\$1,070,885	11.13	\$1,089,081	-2.24	\$-18,196	-25%	-2%	ISSUE
2			College of		16030	5121x	16.64	\$888,841	16.65	\$870,849	-0.01	\$17,992		2%	
3			College of		16030	5131x	73.35	\$6,303,687	68.38	\$6,598,890	4.97	\$-295,203	7%	-5%	ISSUE
4 Subtotal by	/ Org						98.88	\$8,263,413	96.16	\$8,558,820	2.72	\$-295,407	3%	-4%	
5 Grand total							98.88	\$8,263,413	96.16	\$8,558,820	2.72	\$-295,407	3%	-4%	

• Subtotals by 2-Digit Org if Show Totals is checked

#### **Report Data:**

•

These fields are included on all reports:

- Org ID the Department ID setup on the project to indicate owner of project/funding
- Org ID Description
  - Fund Code: (only one at a time)
    - o 16030 (Academic Affairs)
    - 16031 (Agricultural Research)
    - o 16032 (Cooperative Extension)
    - o 91000 Auxiliaries (Trust Fund )
    - 91000 Overhead ((F&A)Trust Fund)
- Account:
  - 5111x (EPA Non-teaching)
  - 5121x (SPA Employees)
  - o 5131x (EPA Teaching)
  - o 5120x (Law Enforcement Officers)
- Fin CN/FY Bud FTE total of continuing budget (CN) and future year (FY) budget FTE entries from Financial System.
- Fin CN/FY Bud Amt total of continuing budget (CN) and future year (FY) budget amount entries from Financial
- System.
   HR Pos FTE total Position Budget FTE from HR System
- HR Pos Amt total Position Budget Amount from HR System
- FTE Difference Financial Budget FTE minus the HR Position Budget FTE.
- Amount Difference Financial Budget Amount minus the HR Position Budget Amt.
- FTE % Difference FTE Difference divided by Fin Bud FTE. (This will be blank if calculation is = 0%)
- Amount % Difference Amount Difference divided by Fin Bud Amt. (This will be blank if calculation is = 0%)
- Needs Attention Displays ISSUE in red when absolute % is greater than certain % (currently 5%) for either FTE or Amount.

These fields are only included on specific reports:

- Program Code Only included on 2-Digits Org with Program Code
- Project Only included on reports by 6-Digit Org
- Position Number Only included on reports by 6-Digit Org with Position
- Position Description Only included on reports by 6-Digit Org with Position
- Vacant designation Only included on reports by 6-Digit Org with Position. "Y" is shown if position is vacant; "N" is shown if position is filled.

#### Report Example by 2-digits Org with Program Code:

High Level Sum	nmary - F	uture Year												
Tilter					Report Options									
*Report Style: 2 Digit	s Org With Pr	ogram Code 🗸	*As Of: 07/01/2021	Ħ	Format Type:	XLS	✓ Print							
*Fund Code: 16030	~				, on all types of									
Org ID:	1 🗐 Fi	rst (1 of 1 ) Last	Go Sho	<u>ID List</u> w Totals										
Total number of reco	rd(s): 7									F	Personalize   Fin	d I 🔎 I 🗖	First (4)	1-12 of 12 🛞 Last
Title	Org ID	Org ID Description	Fund Cod	e Account	Program Code	Fin CN/FY Bud FTE	Fin CN/FY Bud Amt	HR Pos FTE	HR Pos Amt	FTE Difference	Amount Difference	FTE % Difference	Amount % Difference	Needs Attention
1		College of	16030	5111x	101	4.20	\$640,281	6.04	\$658,282	-1.84	\$-18,001	-44%	-3%	ISSUE
2		College of	16030	5111x	110	2.38	\$116,647	2.90	\$171,646	-0.52	\$-54,999	-22%	-47%	ISSUE
3		College of	16030	5111x	152	2.31	\$313,957	2.19	\$259,153	0.12	\$54,804	5%	17%	ISSUE
4 Subtotal by Acct				5111x		8.89	\$1,070,885	11.13	\$1,089,081	-2.24	\$-18,196	-25%	-2%	ISSUE
5		College of	16030	5121x	101	14.35	\$759,766	14.36	\$741,776	-0.01	\$17,990		2%	
6		College of	16030	5121x	110	1.00	\$52,701	1.00	\$52,700		\$1			
7		College of	16030	5121x	152	1.29	\$76,374	1.29	\$76,373		\$1			
8 Subtotal by Acct				5121x		16.64	\$888,841	16.65	\$870,849	-0.01	\$17,992		2%	
9		College of	16030	5131x	101	73.35	\$6,303,687	68.38	\$6,598,890	4.97	\$-295,203	7%	-5%	ISSUE
10 Subtotal by Acct				5131x		73.35	\$6,303,687	68.38	\$6,598,890	4.97	\$-295,203	7%	-5%	ISSUE
11 Subtotal by Org						98.88	\$8,263,413	96.16	\$8,558,820	2.72	\$-295,407	3%	-4%	
12 Grand total						98.88	\$8,263,413	96.16	\$8,558,820	2.72	\$-295,407	3%	-4%	

- This report also includes Program Code.
- Subtotals by Account, then by 2-Digit Org if Show Totals is checked

#### Report Example by 4-Digits Org:

High Level Summ	ary - Fu	ture Year												
▼ Filter					R	leport Opti	ons							
*Report Style: 4 Digits O	Irg	~	*As Of: 07/0	1/2021 🛐		Format Ty	e: XLS v	P	rint					
*Fund Code: 16030	~													
Org ID: Find	First	t 🕚 1 of 1 🕑 Last	Choose Values	from Org IE	) List									
1	Q	+ -	Go	🗹 Show T	otals									
Total number of record(	s): 3													
											Personalize	Find   🖾   🗴	First 🕚	1-5 of 5 🛞 Last
Title	Org ID	Org ID Description		Fund Code	Account	Fin CN/FY Bud FTE	Fin CN/FY Bud Amt	HR Pos FTE	HR Pos Amt	FTE Difference	Amount Difference	FTE % Difference	Amount % Difference	Needs Attention
1		College of		16030	5111x	8.89	\$1,070,885	10.66	\$1,043,080	-1.77	\$27,805	-20%	3%	ISSUE
2		College of		16030	5121x	16.64	\$888,841	16.15	\$850,849	0.49	\$37,992	3%	4%	
3		College of		16030	5131x	12.43	\$839,980	7.45	\$698,130	4.98	\$141,850	40%	17%	ISSUE
4 Subtotal by Org						37.96	\$2,799,706	34.26	\$2,592,059	3.70	\$207,647	10%	7%	ISSUE
5 Grand total						37.96	\$2,799,706	34.26	\$2,592,059	3.70	\$207,647	10%	7%	ISSUE

• Subtotals by 4-Digit Org if Show Totals is checked

## Report Example by 6-Digits Org:

<b>Filter</b>					Report Option	ns								
Report Style:	6 Digits Org	~	*As Of: 07/01/2021	1	Earmat Tuna	XIS	Print							
Fund Code:	16030 🗸				r ormat Type	. [100.0								
Org ID:	Find ]	First () 1 of 1 () Last	Choose Values from Org	ID List										
lotal number o	f record(s): 9										Personaliza   Eis	a 1 🖄 1 🛤	First (4)	111.011
Title	Org ID	Org ID Description	Fund Code	Account	Project	Fin CN/FY Bud FTE	Fin CN/FY Bud Amt	HR Pos FTE	HR Pos Amt	FTE Difference	Amount Difference	FTE % Difference	Amount % Difference	Needs Attention
1		College of	16030	5111x		4.20	\$640,281	5.45	\$600,281	-1.25	\$40,000	-30%	6%	ISSUE
2		College of	16030	5111x				0.12	\$12,000	-0.12	\$-12,000			
3		College of	16030	5111x		2.38	\$116,647	2.90	\$171,646	-0.52	\$-54,999	-22%	-47%	ISSUE
4		College of	16030	5111x		2.31	\$313,957	2.19	\$259,153	0.12	\$54,804	5%	17%	ISSUE
5 Subtotal by	Acct			5111x		8.89	\$1,070,885	10.66	\$1,043,080	-1.77	\$27,805	-20%	3%	ISSUE
6		College of	16030	5121x		14.35	\$759,766	13.86	\$721,776	0.49	\$37,990	3%	5%	j.
7		College of	16030	5121x		1.00	\$52,701	1.00	\$52,700		\$1			
8		College of	16030	5121x		1.29	\$76,374	1.29	\$76,373		\$1			
9 Subtotal by	Acct			5121x		16.64	\$888,841	16.15	\$850,849	0.49	\$37,992	3%	4%	
10		College of	16030	5131x		11.54	\$726,762	6.45	\$584,912	5.09	\$141,850	44%	20%	ISSUE
11		College of	16030	5131x		0.89	\$113,218	1.00	\$113,218	-0.11		-12%		ISSUE
12 Subtotal by	Acct			5131x		12.43	\$839,980	7.45	\$698,130	4.98	\$141,850	40%	17%	ISSUE
12 Subtotal by	Org					37.96	\$2,799,706	34.26	\$2,592,059	3.70	\$207,647	10%	7%	ISSUE
S Subtotal by														

- The 6-Digit Org report also includes Project
- Subtotals by Account, then by 6-Digit Org if Show Totals is checked

#### Report Example by 6-Digits Org with Position:

Filter								Report Option	ns									
Report Style:	6 Digits O	rg With Posi	tion	~	*As Of: 07	01/2021		Format Type	XLS	<ul> <li>Print</li> </ul>								
Fund Code:	16030	~																
Org ID:	Find	Firs	t 🚯 1 of 1	Last	Choose Valu	es from Org I	D List											
	I	٩	+	-	Go	Show	Totals											
Total number	r of record(	s): 3																
																	Personalize	Find
Title		Org ID	Org ID Des	cription		Fund Code	Account	Project	Fin CN/FY Bud FTE	Fin CN/FY Bud Amt	HR Pos FTE	HR Pos Amt	Position Number	Position Description	Vacant	FTE Difference	Amount Difference	FTE % Differen
Title		Org ID	Org ID Des Office of	cription		Fund Code 16030	Account 5111x	Project	Fin CN/FY Bud FTE	Fin CN/FY Bud Amt	HR Pos FTE 1.00	HR Pos Amt \$132,690	Position Number	Position Description Director	Vacant	FTE Difference	Amount Difference	FTE % Different
Title 1 2 Subtotal b Fund/Acct	y t/Proj	Org ID	Org ID Des Office of	cription		Fund Code 16030 16030	Account 5111x 5111x	Project	Fin CN/FY Bud FTE 1.00	Fin CN/FY Bud Amt \$132,690	HR Pos FTE 1.00 1.00	HR Pos Amt \$132,690 \$132,690	Position Number	Position Description Director	Vacant	FTE Difference	Amount Difference	FTE % Different
Title 1 2 Subtotal b Fund/Acct 3	oy t/Proj	Org ID	Org ID Des Office of Office of	cription		Fund Code 16030 16030 16030	Account 5111x 5111x 5111x 5121x	Project	Fin CN/FY Bud FTE 1.00	Fin CN/FY Bud Amt \$132,690	HR Pos FTE 1.00 1.00 1.00	HR Pos Amt \$132,690 \$132,690 \$67,000	Position Number	Position Description Director Accountant	Vacant N Y	FTE Difference	Amount Difference	FTE % Differen
Title 1 2 Subtotal b Fund/Acct 3 4	y t/Proj	Org ID	Org ID Des Office of Office of Office of	cription		Fund Code 16030 16030 16030 16030	Account 5111x 5111x 5121x 5121x	Project	Fin CN/FY Bud FTE 1.00	Fin CN/FY Bud Amt \$132,690	HR Pos FTE 1.00 1.00 1.00 0.35	HR Pos Amt \$132,690 \$132,690 \$67,000 \$30,000	Position Number	Position Description Director Accountant Accountant	Vacant N Y N	FTE Difference	Amount Difference	FTE % Different
Title           1           2         Subtotal b Fund/Acct           3           4           5         Subtotal b Fund/Acct	ay t/Proj ay t/Proj	Org ID	Org ID Des Office of Office of Office of	cription		Fund Code 16030 16030 16030 16030 16030	Account 5111x 5111x 5121x 5121x 5121x 5121x	Project	Fin CN/FY Bud FTE 1.00	Fin CN/FY Bud Amt \$132,690 \$97,000	HR Pos FTE 1.00 1.00 0.35 1.35	HR Pos Amt \$132,690 \$132,690 \$67,000 \$30,000 \$97,000	Position Number	Position Description Director Accountant Accountant	Vacant N Y N	FTE Difference	Amount Difference	FTE % Different
Title           1           2         Subtotal b           3         4           5         Subtotal b           6         Subtotal b	yy t/Proj t/Proj t/Proj sy Org	Org ID	Org ID Des Office of Office of Office of	cription		Fund Code 16030 16030 16030 16030 16030	Account 5111x 5111x 5121x 5121x 5121x 5121x	Project	Fin CN/FY Bud FTE 1.00 1.38 2.35	Fin CN/FY Bud Amt \$132,690 \$97,000 \$229,690	HR Pos FTE 1.00 1.00 0.35 1.35 2.35	HR Pos Amt \$132,690 \$67,000 \$30,000 \$97,000 \$229,690	Position Number	Position Description Director Accountant Accountant	Vacant N Y N	FTE Difference	Amount Difference	FTE % Different

- This 6-Digit Org Report also includes Position Number, Position Description, and Vacant designation of the position.
- Subtotals by Fund/Acct/Project, then by 6-Digit Org if Show Totals is checked
- Difference and Needs Attention calculations are only on subtotal lines.

# Position Control Report by Project (Project Positions Rpt by Dept) :

This report view has been incorporated into PeopleSoft with the other position control reports and can now be viewed on the page and downloaded as PDF, XLS, or HTM format. This report shows both HR position data and HR employee assignment data together. It does not include financial budget data except for Total Financial Budget in the Totals section.

You specify in the "Subset Data" field whether to run it by DeptID or by Project. When you want to change how you run it (by DeptID or by Project), you need to click the Clear button first.



#### **Example of Report on Screen:**

	Position Control Report by Deptid	
	▼ Filter Selection	Report Options
	Subset Data Project  As Of: 02/28/2021 II Go Clear	Format Type:  Print
	Project: QAccount: 5111x V Exact Match	Positions loaded: 2. Employees loaded: 1.
	Piscal Year: Fund: Class: Program: Dept ID: 16000 212 101	
	▼ ProjectID	Find View All First ( 1 of 1 ) Last
	ProjectiD 201700 Account 51119	
	Positions	Personalize   Find   View All   🖾   🚺 First 🕢 1-2 of 2 🕟 Last
	Position Job TTTP Position Numer Title Posn Dept Project	Pos Budget Amt Pos Budget FTE Vacant
	SVP.	\$22,758.57 0.08 N
	2 Director	\$84,163.00 0.50 N
	▼ Employees Assigned with No Pos Budg	Personalize   Find   View All   🖾   🕅 First 🕢 1 of 1 🕟 Last
/	T Empl ID Empl Record Name Job Title Job Dept Position N	lumber Work Against Empl Status Assign Assign FTE
	1 0 Director	Y Active \$11,857.39 0.13
Employees		
Linployees	Totals Person ize   🖉   💹	
(Assigned	Total Positions Budgeted \$106,921.58 0.59	
with No	Assigned with Positions Budget \$106,921.58 0.59	
Pos Budg)	Assigned with No Pos Budg \$11,857.39 0.15	
_	Total Available \$-11,857.40 -0.13	
	Total Financial Budget	
	Total Positions Budget \$106,921.58 0.59	
	Reserve 3-106,921.58 -0.59	

Fund, Class, Program, bept ID and Dept Description are then displayed in the Filter Selection box for information only. In blue, it tells you how many positions were loaded in the Positions Section and employees loaded in the Employees Section.

#### **Positions Section:**

Positions line: On far right, it tells you how many rows of data. Default is 10 lines are shown. If more than 10 lines, Click the arrow to page through list, or Click "View All" to display all lines of data, or Click "View 10" to change back to only 10.

#### Data is displayed on tabs: Position and Job (Employee Assignment data for employees in position). You can click on each tab. -OR-

TO SEE SUMMARY OF ALL TABS/COLUMNS TOGETHER: Click on button next to tabs to "Show All Columns".

#### SUMMARY OF ALL TABS/COLUMNS TOGETHER:

(Some columns of Employee Assignment data on the far right are not shown in this example.)

polition Control Poport by D	optid												New Window	/ Personali
Filter Selection	shiin							Report Op	ions					
Subset Data Project	As Of: 02/28/202	21 🗒	Go	Clear				Format Typ	:	▼ Print				
Project: Fiscal Year: Fund: Class:	QAccount: 5111x V	Exact Match						Positions lo	aded: 2. Empl	oyees loaded: 1.				
16030 212 ProjectID	101											Find   View /	VI First 🕢 1 (	of 1 🕑 Las
Brainstill, 201700	Account 54440													
Positions	Account 21113										Personalize   Find	View All 📳 🚺	First 🚯 1-2 of	2 🛞 Last
Position Number Title	Posn Dept Project	Pos Budget Amt	Pos Budget Vac	ant Empl ID	Empl Record	Work Against	Empl Status		Position Number	Name	Job Title	Job Dept	Assign Amount	Assign FTE
1 SVP		\$22,758.57	0.08 N		0	N	Active				Senior Vice Provost		\$22,758.58	0.08
2 Director		\$84,163.00	0.50 N		(	N	Active				Director		\$84,163.00	0.50
<ul> <li>Employees A signed with No I</li> </ul>	Pos Budg					Personalize	Find   View Al	I 🖾 I 🚺	First 🛞 1	of 1 🕟 Last				
Ampl ID Ampl Name	L. L	lob Title		Job Dept	Position N	mber V	Vork Against	Empl Statu	Assign	Assign				
1 0	C	Director				Y		Active	\$11,85	7.39 0.13				
Totals	Personalize	2   X												
Label	Amount F	TE												
Total Positions Budgeted	\$106,921.58	0.59												
Assigned with Positions Budget	\$106,921.58	0.59												
Subtotal Available	\$-0.01													
Assigned with No Pos Budg	\$11,857.39	0.13												
Total Available	\$-11,857.40	-0.13												
Total Financial Bydget														
Total Positions Budget	\$106,921.58	0.59												
Damage 1	E 105 031 50	0.50												

#### Positions section:

Note this report displays the position data and employee assignment data on one line when the "Show All Columns" button is clicked. This section includes position budget data and employee assignment data for employees in the position.

Position data begins with Position Number column through the Vacant column. Employee Assignment data begins with Empl ID column through Assign FTE column.

The "Vacant" column has Y if position is vacant and it will only have position data and no employee job assignment data.

The "Work Against" column has "Y" if employee is set up as work against the position in Distribution Setup.

Positions with multiple employees working against the position will show the position data repeated for each employee.

The "Empl Status" dolumn to indicate if employee is active, on leave, or leave with pay.

#### Employees section: (Employees Assigned With No Pos Budg)

This section is shown if there are employees assigned to project and account in Distribution Setup but not in a position <u>or</u> their position is not assigned to the project and account selected. This section only shows Employee Assignment data.

#### Totals:

The box at bottom displays the totals and includes Total Financial Budget and Total Positions Budget to calculate Reserve.

Total Positions Budgeted: Sum of Position Budget Amt and FTE
Assigned with Positions Budget: Sum of Employee Assigned Amt in Positions section
Subtotal Available: Total Positions Budgeted minus Assigned with Positions Budget
Assigned with No Pos Budg: Sum of Employees Assigned Amt & FTE but no Position Budget (Employees section)
Total Available: Subtotal Available minus Assigned with No Pos Budg

**Total Financial Budget**: Total <u>continuing (CN) and one-time (CY)</u> budget from Financials for project/account **Total Positions Budget**: Sum of position budget Amt and FTE (same as 1<sup>st</sup> total above) **Reserve**: Total Financial Budget minus Total Positions Budget

#### To download or print the report:

- Report Options select Format Type to download into HTM, PDF, or XLS. Totals are included in report options.
- Click Print. NOTE: Print is disabled until Go is clicked and report appears on screen.

Click Clear to clear all filter selections and re-select.

# **HR Position Detail Extract:**

This option is used to run only the HR Position Detail data. This is same data as available within the Position Control Summary by clicking on button for HR Posn Details. However, it will give you all the details for a Deptid or Org in one report.

Filter Selection is same as Position Control Summary report. Some columns of data that are on the far right are not shown in this example.

HR Position Detail Summar	y Report																	
▼ Filter Selection																		
*Subset Data: Project	7	Select Accounts	5	Select Fund	Codes													
Parlant C			31x 5120x	16030	16031 16	032 🗌 910	100 (F & A)											
*As Of: 02/28/2021	J Exact Match	Go	Clear		91000 (Aux)	OR _ 910	00 (Oth in	ci Aux)										
Enter the filter data and click Go.																		
HR Position Detail																		
DEPT (OUC) DEP	Г NAME	ORG (FUNDING SOURCE)	ORG DEPT	NAME	ACCT	PROJ	Fund	Class	PGM	POS NBR	POSTTL	HR Pos FTE	HR Pos Amt	Effdt	Eff Seq	Distrb %	Act Override	Fiscal Y
1			College Of		5111x		16030	212	101		Director	0.50	\$84,163	07/01/2020	0	100.000	N	
2 :			College Of		5111x		16030	212	101		SVP-	0.09	\$22,759	07/01/2020	0	8.878	N	
0.0380 milliseconds																		

# **HR Assignment Detail Extract:**

This option is used to run only the HR Assignment Detail data. This is same data as available within the Position Control Summary by clicking on button for HR Assign Details. However, it will give you all the details for a Deptid or Org in one report.

Filter Selection is same as Position Control Summary report. Some columns of data that are on the far right are not shown in this example.

HR Assign Detail E	xtract																		
*Subset Data: Project Project: *As Of: 02/28/2021 Enter the filter data and cli	Exact Match      Ck Go.	Select Accounts	i131x 512 Clear	0x 2 16030	d Codes	2 91000 ( R 91000 (	(F & A) (Oth incl Aux	9											
HR Assign Detail																			
DEPT (HOME OUC)	HOME DEPT NAME	ORG (FUNDING SOURCE)		ORG DEPT NAME	A	CCT P	PROJ F	und	Class	PGM	HR Assign FTE	HR Assign Amt	POS NBR	W/A	POS TTL	EMPLID	EMPL RCD	Name	
1			College Of		5111x		16	130	212	101	0.50	\$84,163		No	Director		0		(
2			College Of		5111x		160	030	212	101	0.13	\$11,857		Yes	Director		0		1
3 (			College Of		5111x		16	030	212	101	0.09	\$22,759		No	SVP-		0		(
0.3460 milliseconds			College Of		31114		10		212	101	0.05	922,133		NU	911		Ū		

### **FIN Budget Detail Extract:**

This option is used to run only the Financial Budget Detail data. This is same data as available within the Position Control Summary by clicking on button for Fin Budget Details. However, it will give you all the details for a Deptid or Org in one report.

Filter Selection is same as Position Control Summary report. Some columns of data that are on the far right are not shown in this example. This pulls current year (continuing and one time) financial budget details only. To view the financial budget details for the next fiscal year (continuing and future year), use the FIN Budg Details drilldown on the Pos Ctl Summary - Future Year Report.

FIN Budget Deta	il Report															
*Subset Data: Project Project: *As Of: 02/28/202 No results found,	Exact Match	Select Accounts	Ix 05131x Clear	5120x	Select Fs	ind Coder 0 1603 0 9100	1 □ 160 0 (Aux) C	02 9100 08 9100	0 (F & A) ) (Oth incl Aux)							
Financial Budget						Decement	Destation	Refere	Manatara							
Department	Description	Account	Project/Grant	Fund Code	Class	Code	Code	Amount	Amount	Journal Date	Line #	GL Journal ID	Reference	Line Descr	Scenario	· 1
1		5111x		16030	212	101		0.00	\$3,500.00	08/31/2020	3		GRADSTUDSU	Grad Student Suppt	CY23	BD,
2		5111x		16030	212	101		0.00	\$46,000.00	10/22/2020	6		E172	Other Personnel	CY23	BD.
3		5111x		16030	212	101		0.00	\$10,708.00	02/23/2021	1		E306	Return of Support	CY23	BD,
4		5111x		16030	212	101		0.00	\$31,667.00	09/02/2020	1		113_140901	Yr 2/5R	CY23	BD,
5		5111x		16030	212	101		0.00	\$75,000.00	08/12/2020	1		E022	Allocate RA/TA Support.	CY23	BD,
6		5111x		16030	212	101		0.00	\$258,000.00	08/12/2020	1		E026	Research Asst.	CY23	BD,
7		5111x		16030	212	101		0.00	\$-60,000.00	08/10/2020			E012	Grad	CY23	BD,
8		5111x		16030	212	101	FTE	0.06	\$9,287.00	07/01/2020	446		160308EGBD	16030 BEGINNING BUDGET LOAD	CN26	BD,
9		5111x		16030	212	101		0.00	\$60,000.00	08/03/2020	1		E012	Grad	CY23	BD,
10		5111x		16030	212	101		0.00	\$25,000.00	08/03/2020	2		E012	Grad	CY23	BD,

## Vacant Positions:

This report lists vacant positions by Deptid along with details such as position information, project funding and previous incumbent. This report is run quarterly for the state appropriated fund codes 16030, 16031 and 16032 and distributed to the colleges/units to provide status of position for the quarterly report required by UNC System Office. Non-state appropriated vacant positions are distributed to the colleges/units annually. Colleges/units can run their own report any time.

▼ Filter Selection			Report Options		
*Subset Data: Deptid V	Select Accounts	Select Fund Codes	Format Type: XLS		
Dept ID:	☑ 5111x         ☑ 5121x         ☑ 5131x         ☑ 5120x           Go         Clear	✓ 16030     ✓ 16031     ✓ 16032     ✓ 91000 (F & A)     ✓ 91000 (Aux)     OR     ✓ 91000 (Oth incl Aux)	Split By Two Split By Four All		
Enter the filter data and click Go. ALL retrieves all depart	tments.				

Subset Data:

- By Deptid the Department ID in HR on the position that is considered as owner of position.
- You may enter up to 6 digits of Deptid.
- ALL retrieves all departments based on your OUC access. See "ALL retrieves all departments" below.

As of date: Use default or enter/select a different date.

Select Accounts:

- 1 or more allowed
- 5111x (EPA Non-teaching)
- 5121x (SPA Employees)
- 5131x (EPA Teaching)
- 5120x (Law Enforcement Officers)

Select Fund Codes:

- 1 or more allowed
- 16030, 16031, 16032
- 91000-Overhead (F&A)
- 91000(Aux) is to pull only auxiliaries
- 91000 Trust Funds
- 91000 (Oth incl Aux) 91000 Trust Funds
  - NOTE: This includes auxiliaries so 91000 (Aux) & 91000 (Oth incl Aux) cannot both be selected.

After all filter data is entered/selected, click Go to run report (unless running ALL – See "ALL retrieves all departments" below)

NOTE: Report Options are disabled until Go is clicked and report appears on screen.

# **Example of Report on Screen:**

Vacant Position F	Report						Percet Ontion									
*Subset Data: Deptid Dept ID: *As Of: 02/28/202	V 21 (H	Select Accounts	5131x Select Clear	ct Fund Codes 5030	2 2 91000 (i 2 91000 (i	F & A) Oth incl Aux)	Format Split By Two	Type: XLS Split By F	v All							
Number of positions loa Department	ided: 3															
Department:	de Reason														Personalize   Find	View All   💷
Posto Sumber	Profile Description T	Job Code Proje	ct Amount	Account A Distrb %	rte -	Split FTE Cur Filled	Temp W/A Timesheet	Temp W/A Distr Setup	Auxiliary Code	Fund	Class	PGM	Org	Org Description		Vacated Date
1 Department:	Asst Director	C12X	\$111,000.00	5111X 100.000	1.00	1.000 N		N		16030	212	170				01/04/2021
Positions     Position Info     Coo	de/Reason Job Info	$\langle \rangle$													Personalize   Fin	td   View All   C
Position Number	Position Description	Seb Code Pr	ject Anour	t Account Distrb	N PTE	Split FTE Cur Fille	ed Temp WiA Timesheet	Temp WIA Distr Setu	Auxiliary Code	Fund	Class	PGM	Org	Org Description		Vacated Date
1	Accountant	0751E	\$67,000.0	00 515X 100.0	00 1.00	1.000 N		N		16030	212	170				01/21/2021
Department:			$ \setminus   $													
Positions			$\langle \rangle \rangle$												Personalize   Fin	nd   View All   🕼
Position Info Coo	de/Reason Job Info		///													
Position Number	Position Description	Job Code Pri	ject know	Account - Distrb	s me	Split FTE Cur Fille	ed Temp WIA Timesheet	Temp WIA Distr Setu	Auxiliary Code	Fund	Class	PGM	Org	Org Description		Vacated Date
1	Accountant	10751E	\$66,000	00 N21X 100.0	00 1.00	1.008 N		N		91000	262	170				09/01/2020
				///												

In blue, below the Filter Selection box, it tells you the total number of positions loaded.

Data is separated and grouped by 6-digit Department into 3 tabs:

- Position Info Position data, budget and distribution information, Vacated Date
- Code/Reason Code/Reason, Description and Comment columns
- Job Info Last incumbent information from Job data (Emplid, Empl Record, Name, Action Reason, New Position/Job/Deptid)

#### TO SEE SUMMARY OF ALL TABS/COLUMNS TOGETHER: Click on button next to tabs to "Show All Columns". NOTE: You have to click on this button for each 6-digit department; therefore, it is easier to review by downloading report into XLS (Excel) – see "To download or print the report" described below.

Summary line for each department: On far right, it tells you how many rows of data. Click the arrow to page through list, or Click "View All" to display all lines of data, or Click "View 10" to change back to only 10 lines.

To download just the information for 6-digit department, click green spreadsheet button on far right of Summary line. To download all departments, see "To download or print the report" described below.

Click Clear to clear all filter selections and re-select.

#### **Position Info:**

- Position Number
- Position Description
- Job Code assigned to position
- Project Account
- Amount position budget amount for the project/account
- Account 5111X, 5121X, 5131X, 5120X
- Distrb % distribution percentage for the project/account
- FTE total position FTE
- Split FTE split FTE based on distribution percentage for the project/account
- Cur Filled displays "Y" if there is a future dated hire action in the HR system to fill this position.
- Temp W/A Timesheet renamed from "TMP\_WA" to "Temp W/A Timesheet" to indicate if a temporary entered the vacant position number on the timesheet to indicate work against the position.
- Temp W/A Distr Setup displays "Y" if a temporary, grad, or student worker is set up in Distribution Setup as work against (Work Against is checked) this vacant position.
- Auxiliary Code
- Fund 16030, 16031, 16032 or 91000
- Class
- PGM program code
- Org the Department ID setup on the project to indicate owner of project/funding
- Org Description
- Vacated Date the date the position became vacant. This will be blank if it is a new position or a position that has never been filled with an employee.

- Vacant 6 months
- Vacant 12 months

#### Code/Reason tab:

- Position
- Position Description
- Code/Reason a combination of the most common reasons for the position status. This provides a column for this to be selected by campus on the quarterly vacant report distributed by the budget office. The Budget Office uses these reasons in determining which vacancies have to be reported on the quarterly report to UNC-System Office.
- Decription

Code/Reason	Description
01	Funds used to pay graduate or teaching assistant(s) working against position
02	Funds used to pay temporary employee(s) working against position
03	Funds used to pay employees (adjuncts,lecturers,etc.) working against position
04	Job offer made but pending candidate's acceptance
05	Job offer accepted (indicate anticipated start date in comments)
06	Position being reviewed by HR for reclassification
07	Position has been posted; active recruitment/interviewing in process
08	Position being moved to "non-state" funds
09	No funds available but holding position for future recruitment
10	No activity is occurring at this time
11	No longer needed - Please Abolish
12	Cluster Hire (Chancellor's Faculty Excellence Program)
13	Other - Please explain in comments column.

- Comment required if Code/Reason "13=Other" was selected. Also, used to provide the anticipated start date if a job offer has been accepted. Additional comments can be provided for other Code/Reasons if needed.
- Effdt
- Created Datetime
- User ID

#### Job Info tab:

- Position Number
- Position Description
- Empl ID employee id of the last incumbent in the position
- Empl Record record number of the last incumbent in the position
- Name last incumbent name
- Action Reason action and reason code used on Job Data for last incumbent
- New Position/Job/Deptid new position number, job code and deptid for the last incumbent

#### To download or print the Vacant Position report:

- <u>Report Options are disabled until Go is clicked and report appears on screen</u>.
- Report Options only Format Type allowed is to download into XLS (Excel).
- All tabs/columns are downloaded.
- Select "Split by Two" to download data by 2-digit Deptid on one tab in Excel.
- Select "Split by Four" to separate data by 4-digit Deptid on separate tabs in Excel.
- "All" is only used when ALL is entered for Deptid See "ALL retrieves all departments" below.
- Once Excel opens, the following warning messages may appear:

Microsoft Excel	X
Excel found unreadable content in 'NC_PC_VACPOS.xlsx'. D	to you want to recover the contents of this workbook? If you trust the source of this workbook, click Yes.
	Yes No

Click "Yes" to open the file.



Click "Close" to close this message box.

ALL retrieves vacant positions for all departments:

- ALL entered for Dept ID retrieves all departments based on your OUC access. This will be used by the Budget Office for the quarterly reports. It can also be used if you are responsible for more than one college/unit.
- In this case, Go is disabled.
- Report Options only Format Type allowed is to download into XLS (Excel).
- You can select "Split by Two" to download data by 2-digit Deptid on one tab in Excel.
- You can select "Split by Four" to separate data by 4-digit Deptid on separate tabs in Excel.
- You can select "All" to download all data on one tab in Excel.
  - Message will appear in blue "Report submitted to the process scheduler. Use the Process Monitor to see when Run Status is Success. Use the Report Manager link to view it."
  - Under Process Monitor, click Refresh until Run Status is "Success".
  - Go back to Vacant Positions.
  - Click on Report Manager.
  - Select Report ending in NC\_PC\_VACPOS.xlsx (will have to select again on following screen).
  - Download to Excel.

# **APPENDIX A:**

# **Summary of the Positions Control Reports**

Report Title as	Description Summary
shown in the	
system	
Pos Ctl	Full report name is Position Control Summary-Current Year. This report is a summary of
Summary-	Financial System salary budget data and HR Position Budget data for the current fiscal year. It
Current Year	provides a tool to assist you in managing your personnel commitments against your current year
	(continuing and one-time) budget.
Pos Ctl	Full report name is Position Control Summary-Future Year. This report is a summary of
Summary-	Financial salary budget data and HR Position Budget data for the future fiscal year. It provides a
Future Year	tool to assist you in managing your personnel commitments against your permanent budget for
	the upcoming fiscal year. This report is the one used most commonly to check for negative
	reserves.
High Level	New high-level position control summary reports were developed to identify differences
Summary-	between Financial Budget and HR Position Budget by Org at a high level without all the detail
Future Year	the other Position Control Summaries have. Org is the Department ID setup on the project to
	indicate owner of project/funding. These reports may be useful for various levels (Business
	Officers, Department Heads, Deans, Provost Office, Budget Office, etc.) These reports also
	identify areas that need attention and displays ISSUE in red when absolute % is greater than a
	certain % (currently 5%) for either FTE or Amount. Subtotals can be included and report
	options are in HTM, PDF, and XLS formats.
HR Position	This option is used to run only the HR Position Detail data. This is same data as available within
Detail Extract	the Position Control Summary by clicking on button for HR Posn Details. However, it will give
	you all the details for a Deptid or Org in one report. Filter Selection is same as Position Control
	Summary report.
HR Assignment	This option is used to run only the HR Assignment Detail data. This is same data as available
Detail Extract	within the Position Control Summary by clicking on button for HR Assign Details. However, it
	will give you all the details for a Deptid or Org in one report. Filter Selection is same as Position
	Control Summary report.
FIN Budget	This option is used to run only the Financial Budget Detail data. This is same data as available
Detail Extract	within the Position Control Summary by clicking on button for Fin Budget Details. However, it
	will give you all the details for a Deptid or Org in one report. Filter Selection is same as Position
	Control Summary report. This pulls current year (continuing and one time) financial budget
	details only. To view the financial budget details for the next fiscal year (continuing and future
	year), use the FIN Budg Details drilldown on the Pos Ctl Summary - Future Year Report.
Vacant Positions	This report lists vacant positions by Deptid along with details such as position information,
	project funding and previous incumbent. This report is run quarterly for the state appropriated
	fund codes 16030, 16031 and 16032 and distributed to the colleges/units to provide status of
	position for the quarterly report required by UNC System Office. Non-state appropriated vacant
	positions are distributed to the colleges/units annually. Colleges and units can run their own
	report any time.
<b>Project Positions</b>	This report shows both HR position data and HR employee assignment data together. It does not
Rpt by Dept	include Financial budget data except for Total Financial Budget in the Totals section.

# Return to the report list.