New Position Control Application in PeopleSoft

Overview:

The Position Control Application provides an easy way to pull together HR System position budget data and Financial System salary budget data. It combines the data into reports to assist in the management of personnel costs and associated funding/budget. The old Position Control Application (Excel version) and the old HR Position Control Report (PDF version) have been upgraded into a new application that resides within the PeopleSoft HR System utilizing PeopleSoft reporting tools.

Security:

The old application did not require a SAR request. There is a new security role for the upgraded Position Control Application in SAR. Due to HR sensitive data, HR Deptid (OUC) security level access will be 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:

From MyPack Home, select Main Menu > Human Resources System > Commitment Accounting > Commitment Accounting Reports > Position Control Application

Click on Commitment Accounting Reports to see list of reports that will include Position Control Application.
The new Position Control Application has a yellow folder in front of the name and arrow on the right. Click on Position Control Application or arrow next to it to see the Position Control Work Center option. Then click on the Position Control Work Center option.

Position Control Work Center: This page displays all the report options along with brief description of each report.

When you click on any report from this page, the Position Control Work Center page will stay open as its own window with each report opening in a new window. This way you can easily go to the Position Control Work Center window to run another report, and you can have multiple reports open simultaneously.
From HR Dashboard in HR 9.2 Upgrade:

Position Control can also be accessed from the new HR Dashboard panel available in HR 9.2 upgrade. If you have the Position Control Application security role, the HR Dashboard panel automatically shows the Position Control Pagelet shown below unless the user removes it. You can click any report directly from this pagelet.

Position Control Work Center is also available under the HR Quicklinks on the left-hand side of the HR Dashboard panel under Reporting and Query Tools if you have the Position Control Application role.
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 (continuing and one-time) budget.

Filter Selection:

Subset Data: (same as old application)
- 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) - renamed from 91000-Overhead (26030) in old application.
- 91000 (Aux) - new selection to only pull auxiliaries.
- 91000 (Oth incl Aux) - renamed from 91000 Trust Funds in old application.
  - NOTE: This includes auxiliaries so 91000 (Aux) & 91000 (Oth incl Aux) cannot both be selected.
  - This includes all trust projects (auxiliaries, contracts, grants, foundations, gifts/endowments, agency funds) except F&A.

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 (dark gray) line: On far right, it tells you how many rows of data. Default is 10 lines of data are shown. Click red 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.

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 (i.e., grads), to the specified Dept, Org, or Project.

TO SEE SUMMARY OF ALL TABS/COLUMNS TOGETHER (similar to old position control summary): Click on button next to tabs to “Show All Columns”. TO GO BACK TO SEE INDIVIDUAL TABS/COLUMNS: Click again on this button.

Totals: box at bottom displays summary totals of FTE and Amount columns. Reserve totals are only shown if run by ORG or Project.
SUMMARY OF ALL TABS/COLUMNS TOGETHER:

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. If changes are made in Financials or HR, they will be reflected in position control the next day.

Fin Budget consists of all continuing (CN) and one-time (CY) budget entries from Financials, and should match WRS reports for the 51110, 51210 and 51310 account lines. This is equivalent to the second set of Fin Budget FTE and Amount columns on the old application. The first set of FIN PosCtl FTE and Amount columns were removed and we now only have one set of Financial Budget columns.

Class is being used instead of sub-class (old application).

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

Totals: box at 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 data that make up the totals (similar to old “drill-down” capability): click on button for Fin Budget Details, 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.

**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.

**HR Assign 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.
To download Position Control Summary report data to Excel:

- On Summary (dark gray) 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 which 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:

![Excel warning message](image)

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’.

- Once file is open in Excel, you may want to delete the columns labeled “FIN Budg Details”, “HR Posn Details”, and “HR Assign Details”.
Position Control Summary-Future Year:

This report is a summary of Financial salary budget data and HR Position Budget data for the future fiscal year. It provides a 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.

Filter Selection:

Subset Data: (same as old application)
- 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) - renamed from 91000-Overhead (26030) in old application.
- 91000 (Aux) - new selection to only pull auxiliaries.
- 91000 (Oth incl Aux) - renamed from 91000 Trust Funds in old application.
  - NOTE: This includes auxiliaries so 91000 (Aux) & 91000 (Oth incl Aux) cannot both be selected.
  - This includes all trust projects (auxiliaries, contracts, grants, foundations, gifts/endowments, agency funds) except F&A.

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 (dark gray) line: On far right, it tells you how many rows of data. Default is 10 lines of data are shown. Click red 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.

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 (similar to old position control summary): Click on button next to tabs to “Show All Columns”. TO GO BACK TO SEE INDIVIDUAL TABS/COLUMNS: Click again on this button.
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. If changes are made in Financials or HR, they will be reflected in position control the next day.

Fin Budget consists of all continuing (CN) and future year (FY) budget entries from Financials, and should match WRS reports. This is equivalent to the second set of Fin Budget FTE and Amount columns on the old application. The first set of FIN PosCtl FTE and Amount columns were removed and we now only have one set of Financial Budget columns.

Class is being used instead of sub-class (old application).

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

TOTALS: box at 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 data that make up the totals (similar to old “drill-down” capability): click on button for Fin Budget Details, 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.

**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.

**HR Assign 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.

To download Position Control Summary report data to Excel: see page 8.
High Level Summary-Future Year:

**New** high-level position control summary reports were developed to identify differences between Financial Budget and HR Position Budget by Org at a high level without all the detail 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.

Filter Selection:

**Report Style:**
- By 2-Digits Org
- By 2-Digits Org With Program Code
- By 4-Digits Org
- By 6-Digits Org
- By 6-Digits Org With Position

**As Of Date:** defaults to 07/01/xx. Use default or enter/select a different date.

**Fund Code:** Only one at a time
- 16030 (Academic Affairs)
- 16031 (Agricultural Research)
- 16032 (Cooperative Extension)
- 91000 (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:

- Enter Org ID in grid box. You have to enter 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.
  - 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. The list changes based on report style.

  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.

### Org ID List

- **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” on dark gray line to display all lines of data, or Click “View 20” to change back to only 20 lines, or Click red arrow to page through list.
- Click OK after selecting. The Org IDs selected will appear in grid box. Only three are shown at a time. It also has count of Org IDs selected.

### High Level Summary - Future Year

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Show Totals: Remove check to not display totals on the report. Default is to show totals.

- Subtotals depend on Report Style selected:
  - 2 Digits Org - Subtotals by 2-Digit Org
  - By 2-Digits Org With Program Code - Subtotals by Account, then by 2-Digit Org
  - By 4-Digits Org - Subtotals by 4-Digit Org
  - By 6-Digits Org - Subtotals by Account, then by 6-Digit Org
  - 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 is checked.

After filter data is entered/selected:

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

OR

- Select Report Options – 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 Summary - Future Year

- 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)
  - 16030 (Academic Affairs)
  - 16031 (Agricultural Research)
  - 16032 (Cooperative Extension)
  - 91000 Auxiliaries (Trust Fund )
  - 91000 F&A (Trust Fund)
- Account:
  - 5111x (EPA Non-teaching)
  - 5121x (SPA Employees )
  - 5131x (EPA Teaching)
  - 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:

- 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:

- Subtotals by 4-Digit Org if Show Totals is checked
Report Example by 6-Digits Org:

- 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:

- 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:

This replaces the old HR Position Control Report that only produced a PDF report and was not part of the Excel based application. 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.

Position Control Report by Project

Filter Selection:

- Project - enter desired project or project-phase OR use Look Up (magnifying glass) and select from list. If only a project is entered, the report will include any phases for the project.
- Account - select from drop down list of valid accounts. Only 1 can be run at a time:
  - 5111x (EPA Non-teaching)
  - 5121x (SPA Employees)
  - 5131x (EPA Teaching)
  - 5120x (Law Enforcement Officers)
- As Of Date - defaults to end of prior month. Use default or enter/select a different date.
- Fiscal Year - display only; based on as of date.

After filter data is entered or selected: Click Go to display report on screen.

NOTE: Print button under Report Options is disabled until Go is clicked and report appears on screen.

Example of Report on Screen:

Fund, Class, Program, Dept 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 (dark gray) line: On far right, it tells you how many rows of data. Default is 10 lines are shown. If more than 10 lines, click red 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”.

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SUMMARY OF ALL TABS/COLUMNS TOGETHER:
(Some columns of Employee Assignment data on the far right are not shown in this example.)

Positions section:
Note this new report displays the position data and employee assignment data on one line when the “Show All Columns” button is clicked. The old Position Control Report displayed the data on two lines. 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 “LV” column on the old report has been replaced with “Empl Status” column 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 or their position is not assigned to the project and account selected. This section only shows Employee Assignment data.

Totals:
The box at bottom displays same totals as old Position Control Report. In addition, new totals have been added for 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 continuing (CN) and one-time (CY) budget from Financials for project/account
**Total Positions Budget**: Sum of position budget Amt and FTE (same as 1st 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 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.

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.
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 General Administration. Non-state appropriated vacant positions are distributed to the colleges/units annually. Colleges and units can run their own report any time.

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 renamed to 91000 (F&A).
- 91000(Aux) is new selection to pull only auxiliaries.
- 91000 Trust Funds renamed to 91000(Oth incl Aux).
- 91000 (Oth incl Aux) - renamed from 91000 Trust Funds in old application.
  - NOTE: This includes auxiliaries so 91000 (Aux) & 91000 (Oth incl Aux) cannot both be selected.
  - This includes all trust projects (auxiliaries, contracts, grants, foundations, gifts/endowments, agency funds) except F&A.

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:

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 (Empid, Emp Rec, 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’s easier to review by downloading report into XLS (Excel) – see “To download or print the report” described below.

Summary (dark gray) line for each department: On far right, it tells you how many rows of data. Click red 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 (dark gray) 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
- Account - 5111X, 5121X, 5131X, 5120X
- Project
- Amount - position budget amount for the project/account
- 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 (new field) - 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 - (new field)
- 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.

**Code/Reason tab:**
- Position Number
- 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-General Administration.

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<thead>
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<th>Code/Reason Description</th>
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- 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.

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

**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.