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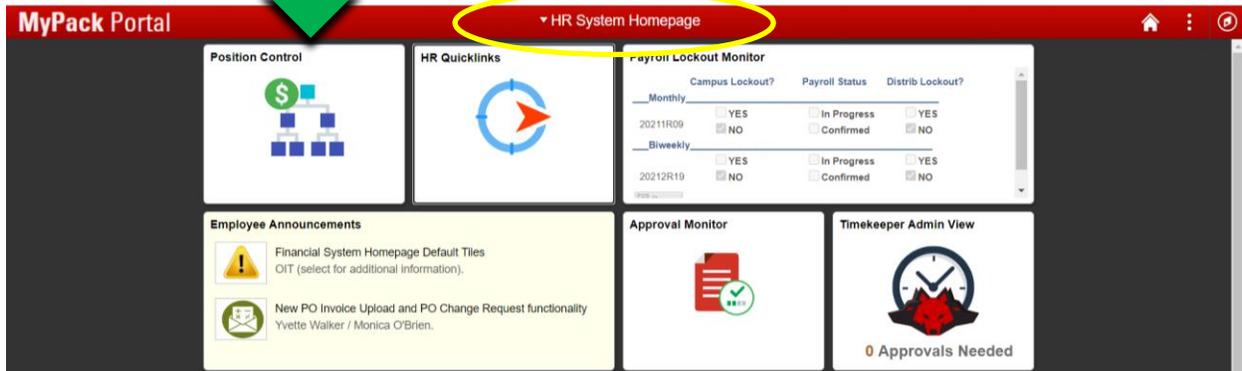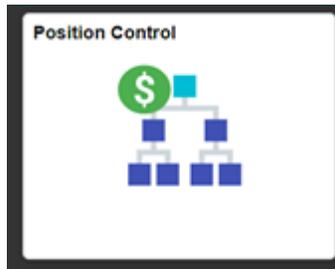
When you click on the Position Control tile, it will open to the Position Control Work Center and the Position Control Report menu on the left as seen below.
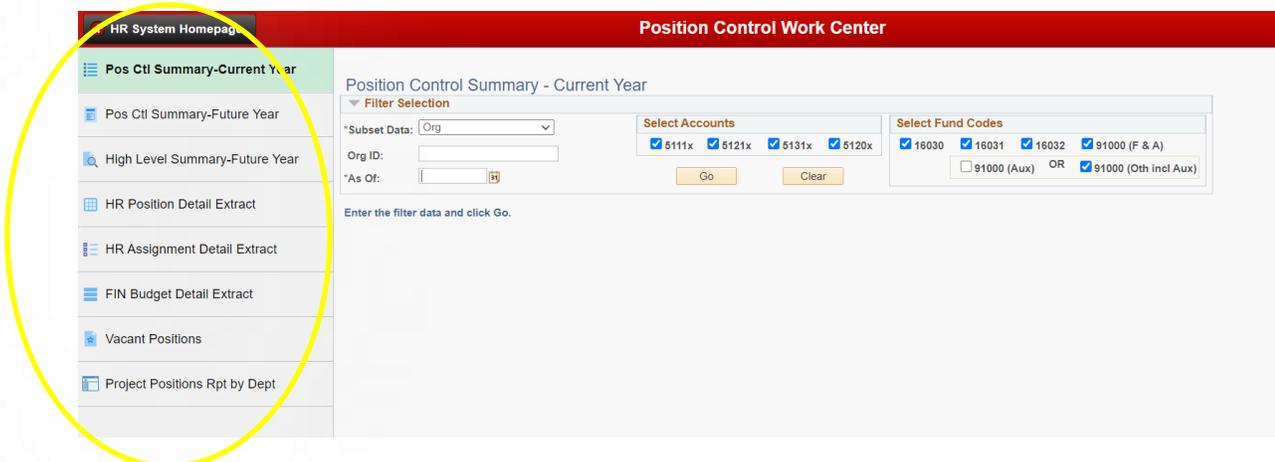

You will choose the report you would like to run from the menu (See Appendix A for report details):

- Pos Ctl Summary-Current Year
- Pos Ctl Summary-Future Year
- High Level Summary-Future Year

- HR Position Detail Extract   (to run separately; detail also available in Pos Ctl Summary Reports)
- HR Assignment Detail Extract   (to run separately; detail also available in Pos Ctl Summary Reports)
- FIN Budget Detail Extract   (to run separately; detail also available in Pos Ctl Summary Reports)
- 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 <u>current</u> 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).
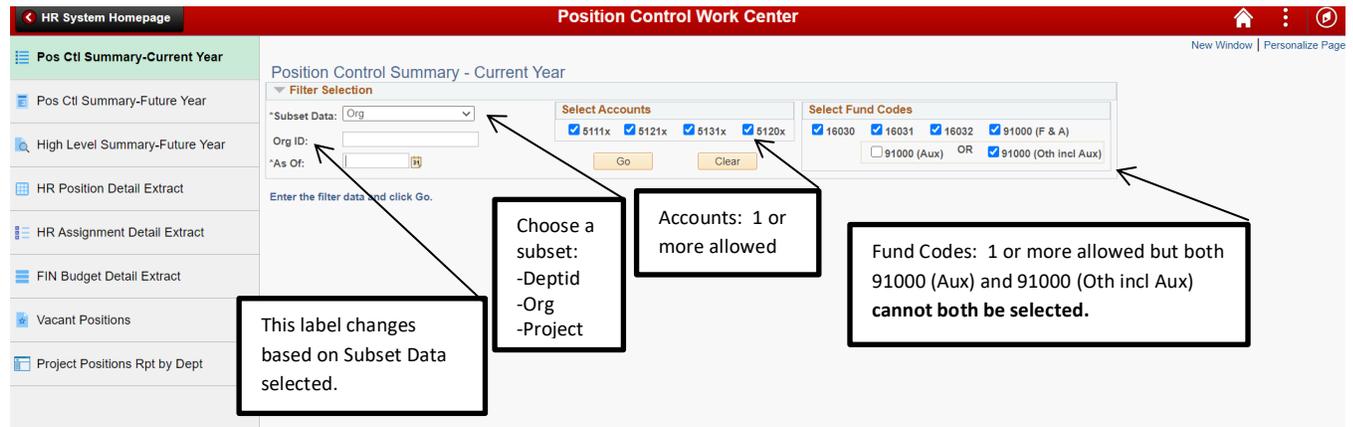
Filter Selection:

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.

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):

Select Accounts: ☑ 5111x ☑ 5121x ☑ 5131x ☑ 5120x
Select Fund Codes: ☑ 16030 ☑ 16031 ☑ 16032 ☑ 91000 (F & A)
☐ 91000 (Aux) OR ☑ 91000 (Oth incl Aux)
[Go] [Clear]

Personalize | Find | View All | 📄 | 📊   First ◄ 1-10 of 75 ► Last

ACCT	PROJ	Fund	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		16030	212	101			4.20	$599,324	📑	5.45	$600,281	📑	-1.25	$-957	5.45	$600,281	📑
5111x		16030	212	101			0.00	$8,695	📑	0.12	$12,000	📑	-0.1	$-3,305	0.12	$12,000	📑
5111x		16030	212	102			0.00	$2,277		0.00	$0		0.00	$2,277	0.00	$0	
5111x		16030	212	110			2.38	$116,647	📑	2.90	$171,646	📑	-0.52	$-54,999	2.00	$117,000	📑
5111x		16030	212	152			2.31	$313,364	📑	2.19	$259,153	📑	0.12	$54,211	2.19	$259,154	📑
5111x		91000	3410	142			0.00	$0		0.10	$6,305		-0.10	$-6,305	0.00	$0	
5111x		91000	262	110			0.00	$0		0.95	$46,233	📑	-0.95	$-46,233	0.20	$12,483	📑
5111x		91000	262	110			0.00	$6,624	📑	0.00	$0		0.00	$6,624	0.00	$0	
5111x		91000	62	152			0.00	$0		0.25	$15,000	📑	-0.25	$-15,000	0.25	$15,000	📑
5111x		91000	62	152			0.00	$0		0.12	$8,625	📑	-0.12	$-8,625	0.12	$8,625	📑

▼ Totals

Fin Bud FTE:	101.65	Fin Bud Amt:	$8,545,480
HR Pos FTE:	107.23	HR Pos Amt:	$9,175,553
Reserve FTE:	-5.58	Reserve Amt:	$-630,073
HR Assign FTE:	133.73	HR Assign Amt:	$9,536,679

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 excess 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 underlined continuing (CN) and one-time (CY) 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/CY Bud FTE and Fin CN/CY Bud Amt for that project and account.

Position Control Summary - Current Year
▼ Filter Selection
*Subset Data: [Org ▼]
Org ID: [XX]
*As Of: [02/28/2021 📅]

Select Accounts: ☑ 5111x ☑ 5121x ☑ 5131x ☑ 5120x
Select Fund Codes: ☑ 16030 ☑ 16031 ☑ 16032 ☑ 91000 (F & A)
☐ 91000 (Aux) OR ☑ 91000 (Oth incl Aux)
[Go] [Clear]

▼ Summary   Personalize | Find | View A

	DEPT	DEPT NAME	ACCT	PROJ	Fund	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	
1		College of Design	5111x		16030	212	101			4.20	$599,324	📑	5.45	$600,281	📑	-1.25	$-957	
2		College of	5111x		16030	212	101			0.00	$8,695	📑	0.12	$12,000	📑	-0.12	$-3,305	
3		College of	5111x		16030	212	102			0.00	$2,277	📑	0.00	$0		0.00	$2,277	
4		College of	5111x		16030	212	110			2.38	$116,647	📑	2.90	$171,646	📑	-0.52	$-54,999	
5		College of	5111x		16030	212	152			2.31	$313,364	📑	2.19	$259,153	📑	0.12	$54,211	
6		College of	5111x		91000	3410	142			0.00	$0		0.10	$6,305	📑	-0.10	$-6,305	
7		College of	5111x		91000	262	110			0.00	$0		0.95	$46,233		-0.95	$-46,233	
8		College of	5111x		91000	262	110			0.00	$6,624	📑	0.00	$0		0.00	$6,624	
9		College of	5111x		91000	62	152			0.00	$0		0.25	$15,000		-0.25	$-15,000	
10		College of	5111x		91000	62	152			0.00	$0		0.12	$8,625	📑	-0.12	$-8,625	

Financial Budget   Per

	Department		Account	Project/Grant	Fund Code	Class	Program Code	Statistics Code	Statistic Amount	Monetary Amount	Journal Date	Line #	GL Journal ID	Reference	Line Descr		Ledger Group	OperID	Aux Co
1	College of		5111x		16030	212	152		0.00	$-593.00	12/22/2020	37	0001		2nd Qtr Budget Revision		CY23	BD_ACTUALS	
2	College of		5111x		16030	212	152	FTE	0.00	$31,114.00	10/26/2020	2	0001____		Abolish pos		CN24	BD_ACTUALS	
3	College of		5111x		16030	212	152	FTE	2.31	$282,843.00	07/01/2020	1292	BEGBD16030	16030BEGBD	16030 BEGINNING BUDGET LOAD		CN26	BD_ACTUALS	

5.5860 second(s)

▼ Totals

Fin Bud FTE:	101.65	Fin Bud Amt:	$8,545,480
HR Pos FTE:	107.23	HR Pos Amt:	$9,175,553
Reserve FTE:	-5.58	Reserve Amt:	$-630,073
HR Assign FTE:	133.73	HR Assign Amt:	$9,536,679

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.

Position Control Summary - Current Year

Filter Selection

*Subset Data:	Org
*Org ID:	XX
*As Of:	02/28/2021

Select Accounts: ☑ 5111x ☑ 5121x ☑ 5131x ☑ 5120x
Select Fund Codes: ☑ 16030 ☑ 16031 ☑ 16032 ☑ 91000 (F & A)
☐ 91000 (Aux) OR ☑ 91000 (Oth incl Aux)

[Go] [Clear]

Summary

	DEPT	DEPT NAME	ACCT	PROJ	Fund	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
1		College of	5111x		16030	212	101			4.20	$599,324		5.45	$600,281		-1.25	$-957
2		College of	5111x		16030	212	101			0.00	$8,695		0.12	$12,000		-0.12	$-3,305
3		College of	5111x		16030	212	102			0.00	$2,277		0.00	$0		0.00	$2,277
4		College of	5111x		16030	212	110			2.38	$116,647		2.90	$171,646		-0.52	$-54,999
5		College of	5111x		16030	212	152			2.31	$313,364		2.19	$259,1..		0.12	$54,211
6		College of	5111x		91000	3410	142			0.00	$0		0.10	$6,305		-0.10	$-6,305
7		College of	5111x		91000	262	110			0.00	$0		0.95	$46,233		-0.95	$-46,233
8		College of	5111x		91000	262	110			0.00	$6,624		0.00	$0		0.00	$6,624
9		College of	5111x		91000	62	152			0.00	$0		0.25	$15,000		-0.25	$-15,000
10		College of	5111x		91000	62	152			0.00	$0		0.12	$8,625		-0.12	$-8,625

HR Position Detail

	DEPT (OUC)	DEPT NAME	ORG (FUNDING SOURCE)	ORG DEPT NAME	ACCT	PROJ	Fund	Class	PGM	POS NBR	POS TTL	HR Pos FTE	HR Pos Amt	Effdt	Eff Seq	Distrb %	Override	Fiscal Y..
1				College of	5111x		16030	212	152		Exe Dir-College Advancement	0.26	$33,220	07/01/2020	0	25.554	N	
2				College of	5111x		16030	212	152		Asst Dean-Finance & Admin	0.57	$62,873	07/01/2020	0	56.763	N	
3				College of	5111x		16030	212	152		Dean	0.36	$98,060	07/01/2020	0	36.1..	N	
4				College of	5111x		16030	212	152		Assoc Director	1.00	$65,000	07/01/2020	0	100.000	N	

5.5860 second(s)

Totals
Fin Bud FTE: 101.65   Fin Bud Amt: $8,545,480
HR Pos FTE: 107.23   HR Pos Amt: $9,175,553
Reserve FTE: -5.58   Reserve Amt: $-630,073
HR Assign FTE: 133.73   HR Assign Amt: $9,536,679

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.

Year

Select Accounts: ☑ 5111x ☑ 5121x ☑ 5131x ☑ 5120x
Select Fund Codes: ☑ 16030 ☑ 16031 ☑ 16032 ☑ 91000 (F & A)
☐ 91000 (Aux) OR ☑ 91000 (Oth incl Aux)

[Go] [Clear]

Personalize | Find | View All | 📄 | XL   First ◄ 1-10 of 75 ► Last

ACCT	PROJ	Fund	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		16030	212	101			4.20	$599,324		5.45	$600,281		-1.25	$-957	5.45	$600,281	
5111x		16030	212	101			0.00	$8,695		0.12	$12,000		-0.12	$-3,305	0.12	$12,000	
5111x		16030	212	102			0.00	$2,277		0.00	$0		0.00	$2,277	0.00	$0	
5111x		16030	212	110			2.38	$116,647		2.90	$171,646		-0.52	$-54,999	2.00	$117,0..	
5111x		16030	212	152			2.31	$313,364		2.19	$259,153		0.12	$54,211	2.19	$259...	
5111x		91000	3410	142			0.00	$0		0.10	$6,305		-0.10	$-6,305	0.00	$0	
5111x		91000	262	110			0.00	$0		0.95	$46,233		-0.95	$-46,233	0.20	$12,483	
5111x		91000	262	110			0.00	$6,624		0.00	$0		0.00	$6,624	0.00	$0	
5111x		91000	62	152			0.00	$0		0.25	$15,000		-0.25	$-15,000	0.25	$15,000	
5111x		91000	62	152			0.00	$0		0.12	$8,625		-0.12	$-8,625	0.12	$8,625	

ORG (FUNDING SOURCE)	ORG DEPT NAME	ACCT	PROJ	Fund	Class	PGM	HR Assign FTE	HR Assign Amt	POS NBR	W/A	POS TTL	EMPLID	EMPL RCD	Name	Effdt	EMPL STATUS	JOBCODE	
	College of	5111x		16030	212	152	0.26	$33,220		No	Exe Dir-College Advancement		0		07/01/2020	Active	C692U	Executive
	College of	5111x		16030	212	152	0.36	$98,061		No	Dean -		0		07/01/2020	Active	C1012S	Dean
	College of	5111x		16030	212	152	0.57	$62,873		No	Asst Dean-Finance & Admin		0		07/01/2020	Active		Asst Dean
	College of	5111x		16030	212	152	1.00	$65,000		No	Assoc Director		0		07/01/2020	Active	C210U	Assoc Dire

Totals
Fin Bud FTE: 101.65   Fin Bud Amt: $8,545,480
HR Pos FTE: 107.23   HR Pos Amt: $9,175,553
Reserve FTE: -5.58   Reserve Amt: $-630,073
HR Assign FTE: 133.73   HR Assign Amt: $9,536,679

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
⚠ The file you are trying to open, 'ps.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?
[Yes] [No] [Help]
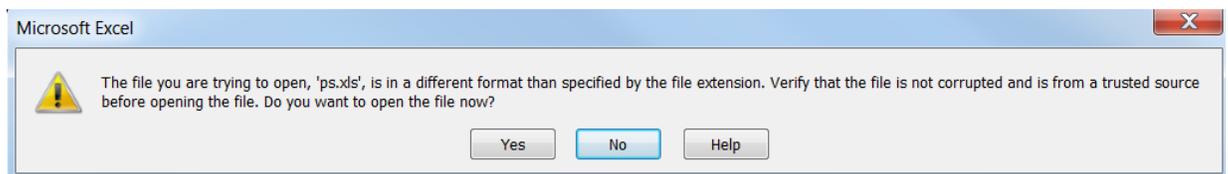
Click "Yes" to open the file. This is due to the current version of PeopleSoft reporting tools creates these spreadsheets with an 'xls' type instead of 'xlsx'.

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 <u>91000 (Aux) & 91000 (Oth incl Aux)</u> **cannot** <u>both be selected</u>.

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.

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:

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 excess 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.

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 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.

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 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
- By 6-Digits Org With Position

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

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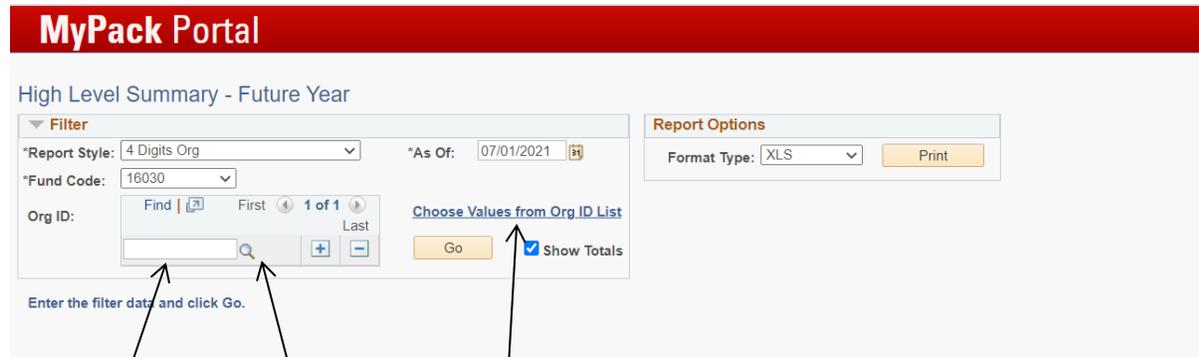
- Enter Org ID in grid box. The number of digits have to match the Report Style; 2 digits for 2-Digits Org report, 4 digits for 4-Digits Org report, and 6 digits for 6-Digits Org reports.
    - Use + sign to enter more than one Org ID.
    - Use – sign to remove more than one previously entered Org ID.

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.
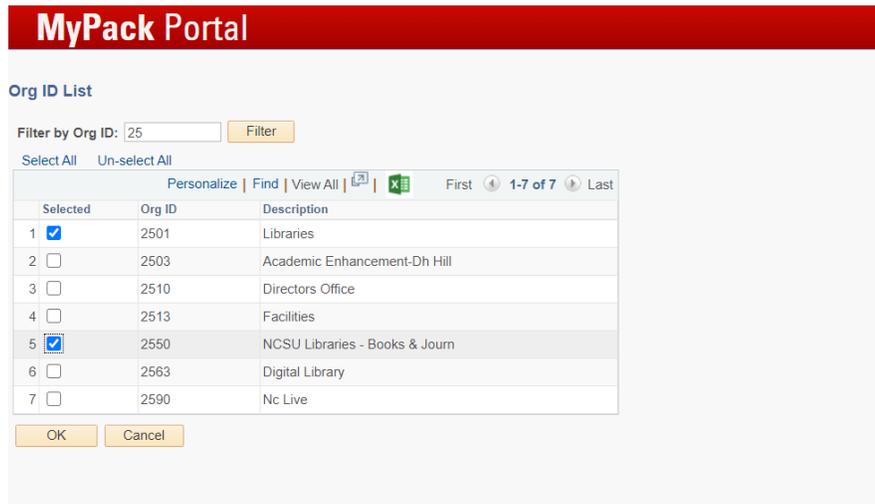
- Filter by Org ID: You can enter 1 or 2 digits and click Filter to list those beginning with those digits.
- You can click on one or more within the list under "Selected" column.
- You can Select All or Un-Select All.
- Click "View All" to display all lines of data, or Click "View 20" to change back 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.

MyPack Portal

High Level Summary - Future Year

Filter

*Report Style: [4 Digits Org ▾]   *As Of: [07/01/2021 📅]

*Fund Code: [16030 ▾]

Org ID: Find | 🔁   First ◀ 1-2 of 2 ▶ Last

Choose Values from Org ID List

2501 🔍 ➕ ➖   [Go]   ☑ Show Totals

2550 🔍 ➕ ➖

Enter the filter data and click Go.

Report Options

Format Type: [XLS ▾]   [Print]

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:
  - o 2 Digits Org - Subtotals by 2-Digit Org
  - o By 2-Digits Org With Program Code - Subtotals by Account, then by 2-Digit Org
  - o By 4-Digits Org - Subtotals by 4-Digit Org
  - o By 6-Digits Org - Subtotals by Account, then by 6-Digit Org
  - o 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.
  - o NOTE: If more than 100 Org IDs are selected, the 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

Filter

*Report Style: 2 Digits Org   *As Of: 07/01/2021
*Fund Code: 16030

Org ID: Find | 🔲   First ◀ 1 of 1 ▶ Last   Choose Values from Org ID List

[search box] ➕ ➖   Go   ☑ Show Totals

Report Options

Format Type: XLS   Print

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	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)
    - 16030 (Academic Affairs)
    - 16031 (Agricultural Research)
    - 16032 (Cooperative Extension)
    - 91000 Auxiliaries (Trust Fund)
    - 91000 Overhead ((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:

High Level Summary - Future Year

Filter

*Report Style: 2 Digits Org With Program Code   *As Of: 07/01/2021   Report Options   Format Type: XLS   Print
*Fund Code: 16030
Org ID: Find   First 1 of 1 Last   Choose Values from Org ID List   Go   Show Totals

Total number of record(s): 7

Personalize | Find | | | First 1-12 of 12 Last

	Title	Org ID	Org ID Description	Fund Code	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 Summary - Future Year

Filter

*Report Style: 4 Digits Org   *As Of: 07/01/2021   Report Options   Format Type: XLS   Print
*Fund Code: 16030
Org ID: Find   First 1 of 1 Last   Choose Values from Org ID List   Go   Show Totals

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:

High Level Summary - Future Year

Filter

*Report Style: 6 Digits Org   *As Of: 07/01/2021   Report Options   Format Type: XLS   Print
*Fund Code: 16030
Org ID: Find   First 1 of 1 Last   Choose Values from Org ID List   Go   Show Totals

Total number of record(s): 9

Personalize | Find | | | First 1-14 of 14 Last

	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%	
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
13	Subtotal by Org						37.96	$2,799,706	34.26	$2,592,059	3.70	$207,647	10%	7%	ISSUE
14	Grand total						37.96	$2,799,706	34.26	$2,592,059	3.70	$207,647	10%	7%	ISSUE

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

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Report Example by 6-Digits Org with Position:

High Level Summary - Future Year

	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	Position Number	Position Description	Vacant	FTE Difference	Amount Difference	FTE % Difference
1			Office of	16030	5111x				1.00	$132,690		Director	N			
2	Subtotal by Fund/Acct/Proj			16030	5111x		1.00	$132,690	1.00	$132,690						
3			Office of	16030	5121x				1.00	$67,000		Accountant	Y			
4			Office of	16030	5121x				0.35	$30,000		Accountant	N			
5	Subtotal by Fund/Acct/Proj			16030	5121x		1.35	$97,000	1.35	$97,000						
6	Subtotal by Org						2.35	$229,690	2.35	$229,690						
7	Grand total						2.35	$229,690	2.35	$229,690						

- 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.

Position Control Report by Project

Position Control Report by Deptid

Filter Selection				Report Options
Subset Data Project	As Of: 02/28/2021	Go	Clear	Format Type: PDF	Print
Project:	Account:	Exact Match		
Fiscal Year: 2021				Enter the filter data and click Go.

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:

Position Control Report by Deptid

Filter Selection				Report Options
Subset Data Project	As Of: 02/28/2021	Go	Clear	Format Type:	Print
Project:	Account: 5111x	Exact Match		
Fiscal Year: Fund: 16030	Class: 212	Program: 101	Dept ID:	Positions loaded: 2. Employees loaded: 1.

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 |

Position Number	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

Empl ID	Empl Record	Name	Job Title	Job Dept	Position Number	Work Against	Empl Status	Assign Amount	Assign FTE
1	0		Director			Y	Active	$11,857.39	0.13

Employees (Assigned with No Pos Budg)

Totals			Personalize	
Label		Amount		FTE
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 Budget				
Total Positions Budget		$106,921.58		0.59
Reserve		$-106,921.58		-0.59

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 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.)

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" 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 <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 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. 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/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 (F&A)
- 91000(Aux) is to pull only auxiliaries
- 91000 Trust Funds
- 91000 (Oth incl Aux) - 91000 Trust Funds
  - o   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:

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

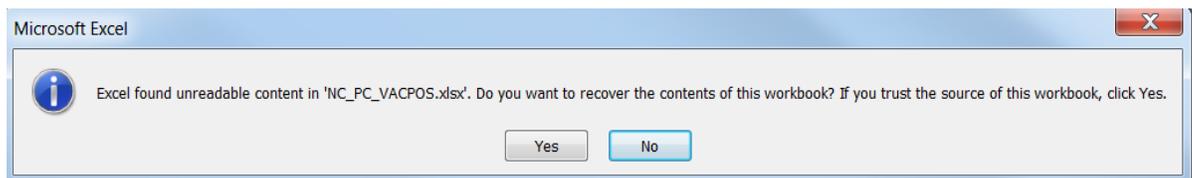| Code/Reason	Description
01	Funds used to pay graduate or teaching assistant(s) working against position
02	Funds used to pay temporary employee(s) working against position
03	Funds used to pay employees (adjuncts,lecturers,etc.) working against position
04	Job offer made but pending candidate's acceptance
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:
- 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.
- Once Excel opens, the following warning messages may appear:

Microsoft Excel

Excel found unreadable content in 'NC_PC_VACPOS.xlsx'. Do 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.

Repairs to 'NC_PC_VACPOS.xlsx'

Excel was able to open the file by repairing or removing the unreadable content.

Removed Records: Merge cells from /xl/worksheets/sheet1.xml part

Click to view log file listing repairs: C:\Users\mcbritt\AppData\Local\Temp\error261600_02.xml

Close

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 shown in the system	Description Summary
Pos Ctl Summary-Current Year	Full report name is 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.
Pos Ctl Summary-Future Year	Full report name is 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.
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.
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.
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.
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. 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.
Project Positions Rpt by Dept	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.

Return to the report list.