Position Roster Report Job Aid:
This job aid will guide a user through the steps of accessing and running the Position Roster Report.

Procedure At-a-Glance

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

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

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

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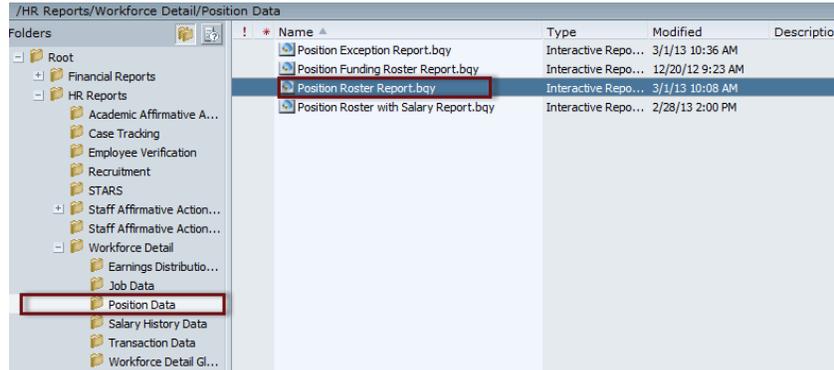
Roles that can access the Report
Users with HR Workforce Detail access can also access the Position Roster Report.

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

Procedure Steps:

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

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

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

Report Parameters:

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

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

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

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

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

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

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

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

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

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

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


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

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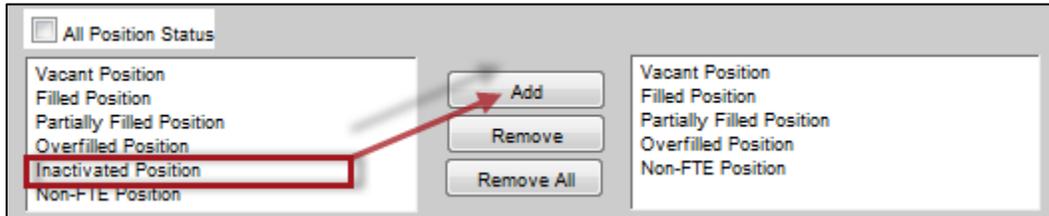
Position Status	Description
Vacant Position	The Position FTE (or Standard Hours) is greater than 0 but there are currently no incumbents hired into the particular position.
Filled Position	The Position FTE (or Standard Hours) is greater than 0 and the Total Position FTE (FTE x Max Head Count) is equal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

Reading the Report:

Option 1: Showing Position Data Only [Click Here for Sample + Description]
Option 2: Showing Position & Incumbent Data [Click Here for Sample + Description]

Position Roster Report (Position Data Only):

As of Date: 12/04/2012		Position Roster Report (Position Data Only)					Page 1 of 2 Run Date: 12/04/2012 Run Time: 09:21 AM

Position Data

Position No.	Position Number
Position Eff. Date	Position Effective Date
Position Title	Position Title
Reports to Position	Report to Position ID
Job Code	Job Code
SAP	Salary Administration Plan
Grade	Salary Grade
Location	Location
Union Code	Union Code
FTE	Position FTE
Head Count	Max Head Count
Total Position FTE	Position FTE x Head Count
Total Job FTE	Sum of all Job FTE

Selection Criteria:

As of Date: 12/04/2012

Org Node: Parent Org Node: KGACS

Position Number: Position Status:

Job code :   Employment Status: A, L, P

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

② Position No	③ Pos. Eff. Date	④ Position Title	⑤ Reports to Position	⑥ Job Code	⑦ FTE	⑧ Head Count	⑨ Total Position FTE	⑩ Total Job FTE

Position Dept: Academic Senate (KGACS)
Position Org Node: KGACS Acad Senate Ops (10160)
① Filled Position

Position No	Pos. Eff. Date	Position Title	Reports to Position	Job Code	FTE	Head Count	Total Position FTE	Total Job FTE
00010690	12/01/2012	Project/Policy Analyst 2	00021908	7397U	1.00	1	1.00	1.00
00021908	12/01/2012	Project/Policy Analyst 4	00019408	7399U	1.00	1	1.00	1.00
00012048	12/01/2012	Project/Policy Analyst 2	00019408	7397U	1.00	1	1.00	1.00
00019408	12/01/2012	Executive Advisor 4	00012749	0554U	1.00	1	1.00	1.00
00012325	12/01/2012	Project/Policy Analyst 5	00019408	0566U	1.00	1	1.00	1.00
00014271	12/01/2012	Project/Policy Analyst 3	00021908	7398U	1.00	1	1.00	1.00
00015676	12/01/2012	Administrative Officer 2	00019408	7376U	0.50	1	0.50	0.50
00016162	12/01/2012	Project/Policy Analyst 3	00012325	7398U	1.00	1	1.00	1.00
00016637	12/01/2012	_____Assistant III	00019408	4722C	1.00	1	1.00	1.00
00020207	12/01/2012	Technical Project Mgt Profl 3	00019408	8822U	0.50	1	0.50	0.50
00031588	12/01/2012	Project/Policy Analyst 3	00012325	7398U	1.00	1	1.00	1.00
Partially Filled Position								
00034189	12/01/2012	Assistant II	00012325	4921U	1.00	1	1.00	0.20
Vacant Position								
00035080	12/01/2012	Administrative Officer 3		7377U	0.50	1	0.50	0.00

Position Org Node: KGACS COR Research (10163)
Filled Position

Position No	Pos. Eff. Date	Position Title	Reports to Position	Job Code	FTE	Head Count	Total Position FTE	Total Job FTE
00016330	12/01/2012	Project/Policy Analyst 3	00019408	7398U	1.00	1	1.00	1.00

Identifier	Description
1	**Report Sort:** The Report is sorted by the following fields: - Position Department (Dept on the HCM Position Data) - Position Org Node (LVL 7 Deptid on HCM Position Data) - Position Status - Job Code
2	**Position Number:** Position Number
3	**Pos. Eff. Date:** Effective-dated row from Position that was used. The row selected will be the maximum effective-dated row that is earlier than or equal to the As of Date.
4	**Position Title:** Position Title or Description from Position Data
5	**Reports To Position:** Position to which the selected position directly reports.

Identifier	Description
6	**Job Code:** Job Code stored on the Position Data
7	**FTE:** Position FTE calculated by entering the selected position's standard hours
8	**Head Count:** Max Head Count set on the Position.
9	**Total Position FTE:** Calculation of FTE x Head Count to represent the total FTE currently tied to the position. This value is used to derive the Position Status.
10	**Total Job FTE:** While incumbent data is not included in this report, this is the total amount of Job % Effort for all current incumbents hired into the position (only A/L/P Employee Status used to determine this value). This value is used to derive the Position Status.

Position Roster Report (Position and Incumbent Data):

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

Position Roster Report (Position & Incumbent Data)

Identifier	Description	Identifier	Description
1	**Report Sort:** The Report is sorted by the following fields: - Position Department (Level 4 or 5 Department) - Position Org Node (LVL 7 DeptID) - Position Status - Job Code	8	**Reports to Position/Supervisor ID:** Position Row will include the "Reports To" Position Number currently on the Position. The Job Data row will include the Supervisor ID and last name.
2	Position Data will appear in the first line while any incumbent (Job Data) will appear in any subsequent lines.	9	**Job Deptid:** No Position Data identifier as this field is used in the overall Report Sorting (Position Dept.). Job Department as stored on the Job record selected.
3	**Position No./Empl. ID:** Position Row will include the Position Number while the Job Data line will include the Employee ID.	10	**Job Code:** Job Code stored on each position's Position Data and Job Data. These values *should* be the same.
4	**Pos. Eff. Date/Job Eff. Date:** Both rows will include the last effective dated row earlier than or equal to the As of Date. The Job row is the maximum effective sequence row.	11	**Appt Type:** No Position Data identifier. Job Appointment Type stored on the Job Data page.
5	**Position Title/Employee Name:** Position Row will include the Position Title while the Job Data row will include the Employee Name.	12	**FTE:** FTE stored at the Position Level. No Job Data identifier.
6	**Rcd #:** No Position Data identifier. Will include the Job Employee Record Number for the incumbent.	13	**Head Count:** Maximum Head Count set on the Position. No Job Data identifier.
7	**Empl. Status:** No Position Data identifier. Will include the current Job Employee Status (Active, Leave of Absence, or Leave with Pay).	14	**Total Position FTE:** Calculation of FTE x Head Count to represent the total FTE currently tied to the position. No Job Data identifier
		15	**Total Job FTE:** Position Row will include the Sum of all Job FTEs hired into the current position. The Job Data rows will include the individual Job % Effort for each incumbent.