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

Procedure At-a-Glance

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

Jump to Procedure Steps  
Jump to Reading the Report

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

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

To Run the Report
Users can access and run the report by following these basic steps. Additional details are provided later in the document.

- Log in to HR BAIRS ([http://rptportal.berkeley.edu/](http://rptportal.berkeley.edu/)).
- Follow this navigation to the report: HR Reports > Workforce Detail > Position Data > Position Roster with Salary Report.bqy.
- Accept defaults or select filters:
  - Show Incumbent Data (for Salary, always accept this default)
  - 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 with Salary Report in HR BAIRS:

![Image of HR BAIRS interface]

2. Open the Position Roster with Salary Report file and enter the Report Parameters [Click for more details]:

![Image of Position Management screen]

3. Once all Report Parameters are set, click the “Process” button to run the report.

Report Parameters:

1. **As of Date**: “Snapshot” as of today’s date (system date). Only data that exist as of this date will be pulled into the report.
2. **Show Incumbent Data**: For Salary, always select “Yes”. If “Yes” is selected, then all Incumbent details will appear in the report (if applicable). In “No” is selected, then only Position Data information will appear in the report.

3. **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:

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

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.

![Manually Enter Org Codes](image)


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.

![Select from list of codes sorted by 5 letter code](image)


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.

![Select from list of codes sorted by the description](image)


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

![Select from a combination of the above methods](image)


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 1 below) by using the “Add one” option or use the “List” option to select certain Job Codes (sorted by either the code itself or the name of the code).

![All Jobs](image)


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

![All Positions](image)
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 below table. The dashboard selection defaults to all statuses except Inactivated.

![Position Status Table](image)

<table>
<thead>
<tr>
<th>Position Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacant Position</td>
<td>The Position FTE (or Standard Hours) is greater than 0 but there are currently no incumbents hired into the particular position.</td>
</tr>
<tr>
<td>Filled Position</td>
<td>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).</td>
</tr>
<tr>
<td>Partially Filled Position</td>
<td>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.</td>
</tr>
<tr>
<td>Overfilled Position</td>
<td>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).</td>
</tr>
<tr>
<td>Inactivated Position</td>
<td>Position Status is set to “Inactive”.</td>
</tr>
<tr>
<td>Non FTE Position</td>
<td>Position FTE (or Standard Hours) are set to 0.</td>
</tr>
</tbody>
</table>

**Reading the Report:**

Showing Position & Incumbent Data [Click Here for Sample + Description] Note: It is assumed this report will be run showing Position & Incumbent data, in order to include Salary. For a sample and description of the report showing Position Data only, see the Position Roster Report job aid.
Position Roster with Salary Report (Position and Incumbent Data):

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>As of Date: Parameter Entered for &quot;As of Date&quot;</td>
</tr>
<tr>
<td>2</td>
<td>Pages &amp; Run Date: The total number of pages for the report along with the time &amp; date the report was run.</td>
</tr>
<tr>
<td>3</td>
<td>Parameters: All parameters entered on the original report dashboard</td>
</tr>
</tbody>
</table>
### Report Sort

The Report is sorted by the following fields:
- Position Department (Level 4 or 5)
- Position Org Node (LVL 7 DeptID)
- Position Status
- Job Code

### Position Data

Position Data will appear in the first line while incumbent (Job Data) will appear in any subsequent lines.

### Position No./Empl. ID

Position row will include the Position Number while the Job Data row will include the Employee ID.

### Pos. Eff. Date/Job Eff. Date

Both rows will include the last effective dated row earlier than or equal to the As of Date. The Job Data row is the maximum effective sequence row.

### Position Title/Employee Name

Position row will include the Position Title. The Job Data row will include Employee Name.

### Job Code/Rcd#:

Position row will include the Job Code on Position while the Job Data row will include the Job Employee Record Number for the incumbent.

### Empl. Status

No Position Data identifier. Will include the current Job Employee Status (Active, Leave of Absence, or Leave with Pay).

### 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.

### FTE/Appt Type

Position row will include Position FTE, while the Job Data row will include the Job Data Appointment Type.

### Head Count

Maximum Head Count set on the Position. No Job Data identifier.

### Total Position FTE

Calculation of FTE x Headcount to represent the total FTE currently tied to the position. No Job Data identifier.

### 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.

### O/A Scale

No Position Data identifier. Will include Off/Above Scale Code from incumbent’s job record, if applicable.

### SAP

No Position Data identifier. Will include Salary Administration Plan from incumbent’s job record, if applicable.

### Grd

No Position Data identifier. Will include Salary Grade from incumbent’s job record, if applicable.

### Step

No Position Data identifier. Will include Salary Step from incumbent’s job record, if applicable.

### Annized Rate

No Position Data identifier. Will include annualized rate of pay from incumbent’s job record Compensation.