# INDIANA UNIVERSITY

# FINANCIAL INFORMATION SYSTEM

## Labor Distribution Inquiries

**Financial Management Support Department**
**May, 1996**

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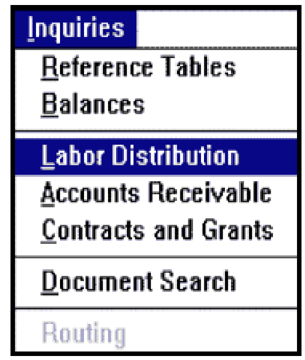
# SECTION 1: GENERAL OVERVIEW

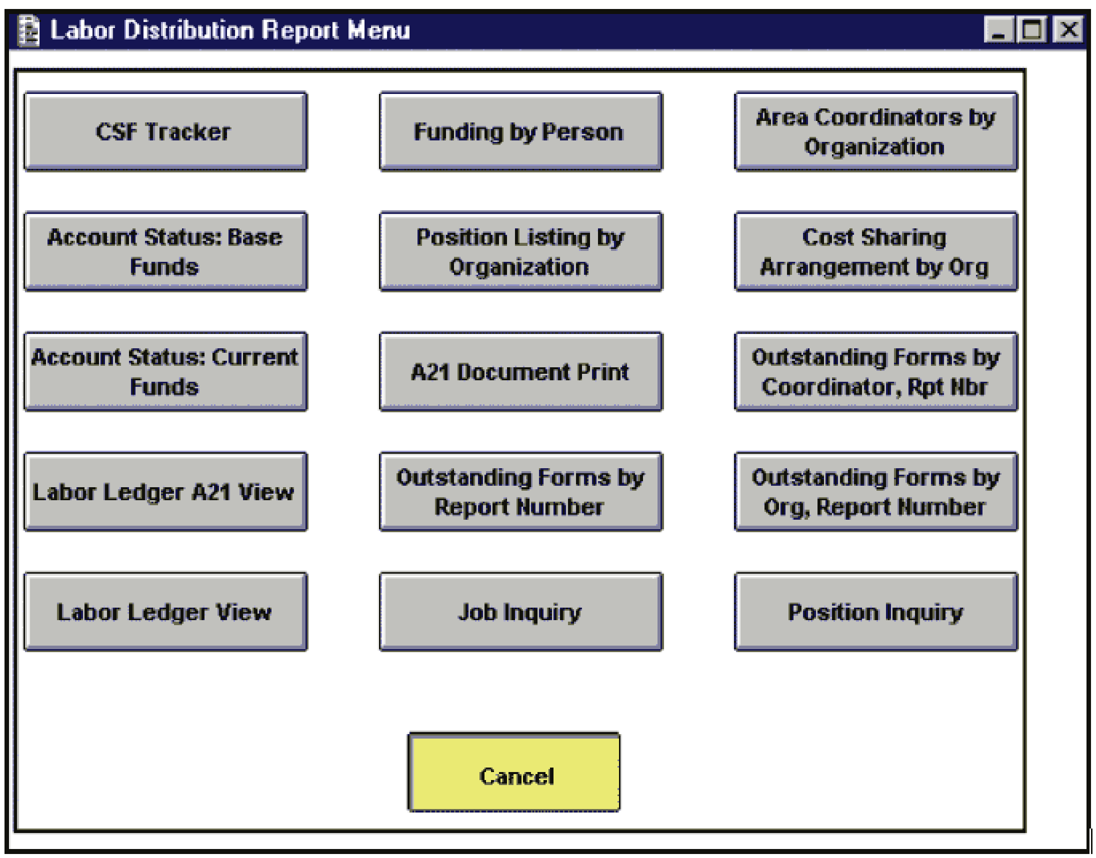
The Labor Distribution System integrates the budgeting and accounting aspects of compensation-related expenses. Labor Distribution reports are part of this system and are accessed through the "Inquiries" option of the menu bar.

## 1.1 How to Access Labor Distribution Reports

You can access the "Labor Distribution Report Menu" from any screen on which the "Inquiries" menu bar is highlighted. To do this, simply click on "Inquiries" and then click on "Labor Distribution."




The following screen will appear providing you with several Labor Distribution report options:



The “Labor Distribution Report Menu” screen allows you to access the various Labor Distribution reports. Clicking on the buttons on this screen will take you to criteria windows, from where you may search for on-line reports.

## 1.2 Performing Report Searches

You can use a variety of criteria to search for reports. After clicking on one of the buttons on the “Labor Distribution Report Menu,” a criteria window will appear which will allow you to perform a search for that type of report.

Some of the fields in the criteria window will be required. Others will be optional. Each report has its own criteria search requirements.

## 1.3 Printing Labor Distribution Reports

The F12 key allows the user to send a report to a printer, offering the following options:

A = prints all of the report (for an entire account, or a part of an account, e.g. a specified object code)
(NOTE: if the report is a long one, it may print many pages and may thus tie up the printer for a long time. Check how long the report is before actually printing it)
S = prints the screen you are currently viewing
F = prints the report in the form that appears on the screen
C = prints the report and then clears the screen

Selecting one of the above options and pressing the F11 key sends the selection to the printer.

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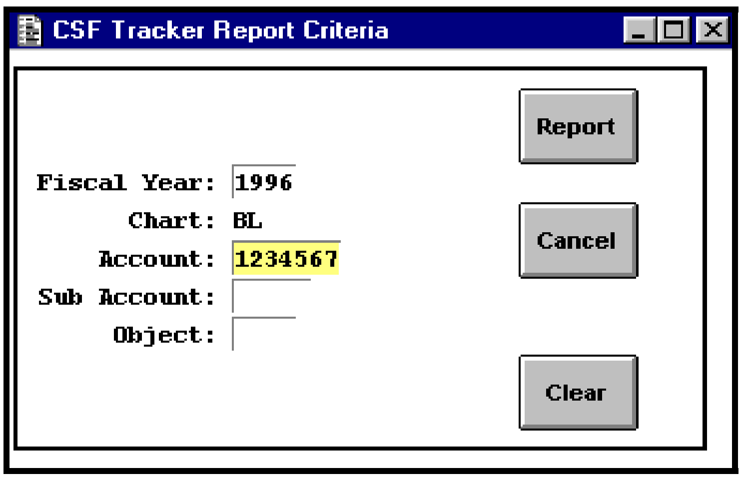
Individual reports will be discussed in *Section 2*.

# SECTION 2: ON-LINE REPORTS

## 2.1 CSF Tracker Report

The Labor Distribution system calculates the base salary for a position for a specific account based on the budgeted salary established during budget construction, and modified by any PAFs which are processed during the year. The CSF Tracker Report shows the detailed history of a position as calculated by the CSF Tracker. The position is defined by account/sub-account/object code/sub-object code and position number. All PAF activity for the fiscal year will be shown on this report.

Clicking on the "CSF Tracker" button brings up the following dialog window asking you to provide specific criteria in order to access the report.




The required fields for this report are "Fiscal Year" and "Account." If you are unsure of the information that should be entered in a particular field, double-clicking on that field will access a search screen or a lookup table.

Entering an account number in the "Account" field will automatically retrieve the chart code into the "Chart" field.

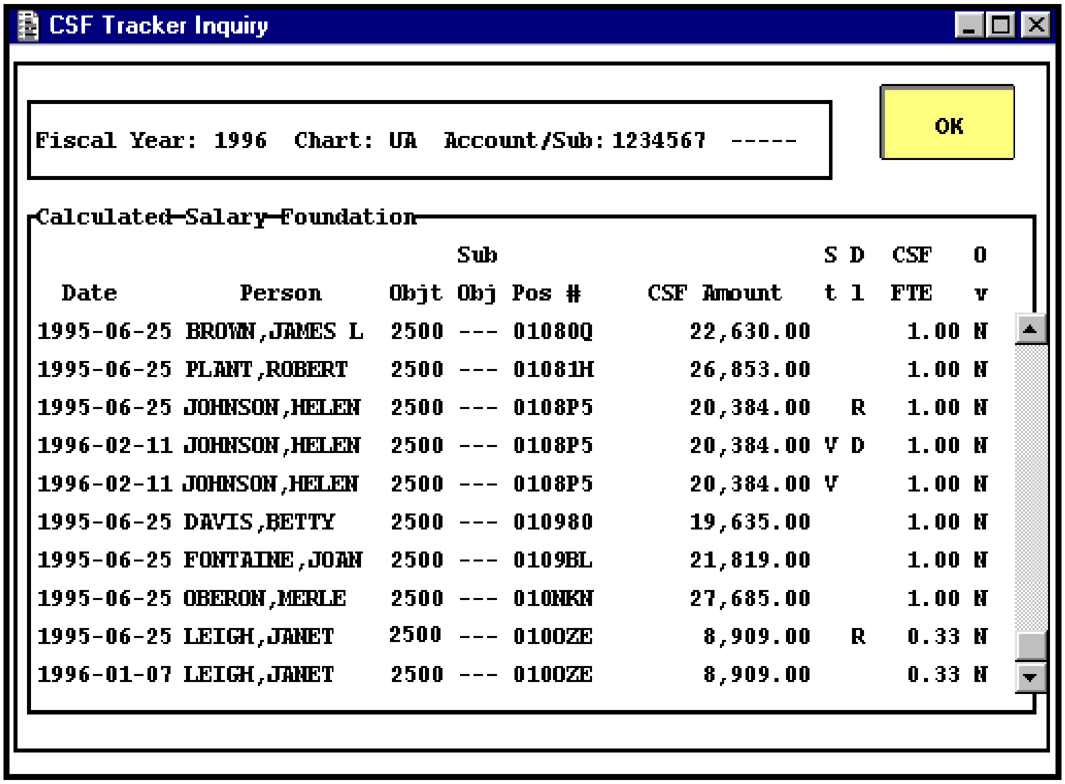
After entering the required criteria, clicking on the "Report" button accesses the "CSF Tracker Inquiry" report which includes all of the object codes which are compensated from that account organized by position number. A scroll bar allows the user to scroll down to check an employee, vacant position, position number, or an object/sub-object code.

NOTE: Entering a valid labor object code in addition to the account number in the "CSF Tracker Search Criteria" window accesses a report which shows **only** those people who are compensated from that account and object code. The valid object codes are:

- 2000 ACADEMIC SALARY
- 2001 ACADEMIC SALARY--EARLY RETIREMENT
- 2400 PROFESSIONAL SALARIES
- 2401 PROFESSIONAL SALARIES--EARLY RETIREMENT

- 2500 NON-EXEMPT STAFF SALARIES

For example, entering object code "2500" in the "Object" field of the "CSF Tracker Report Criteria" window, and clicking on "Report" would return only the non-exempt salaried staff compensated from the selected account:



CSF Tracker Inquiry

OK

Fiscal Year: 1996 Chart: UA Account/Sub: 1234567 -----

Calculated Salary Foundation

| Date | Person | Objt | Sub Obj | Pos # | CSF Amount | St | Dl | CSF FTE | Ov |
|---|---|---|---|---|---|---|---|---|---|
| 1995-06-25 | BROWN,JAMES L | 2500 | --- | 01080Q | 22,630.00 | | | 1.00 | N |
| 1995-06-25 | PLANT,ROBERT | 2500 | --- | 01081H | 26,853.00 | | | 1.00 | N |
| 1995-06-25 | JOHNSON,HELEN | 2500 | --- | 0108P5 | 20,384.00 | | R | 1.00 | N |
| 1996-02-11 | JOHNSON,HELEN | 2500 | --- | 0108P5 | 20,384.00 | V | D | 1.00 | N |
| 1996-02-11 | JOHNSON,HELEN | 2500 | --- | 0108P5 | 20,384.00 | V | | 1.00 | N |
| 1995-06-25 | DAVIS,BETTY | 2500 | --- | 010980 | 19,635.00 | | | 1.00 | N |
| 1995-06-25 | FONTAINE,JOAN | 2500 | --- | 0109BL | 21,819.00 | | | 1.00 | N |
| 1995-06-25 | OBERON,MERLE | 2500 | --- | 010NKN | 27,685.00 | | | 1.00 | N |
| 1995-06-25 | LEIGH,JANET | 2500 | --- | 010OZE | 8,909.00 | | R | 0.33 | N |
| 1996-01-07 | LEIGH,JANET | 2500 | --- | 010OZE | 8,909.00 | | | 0.33 | N |

For more detailed information about the "CSF Tracker Inquiry" fields, please see *Appendix B.1 CSF Tracker Inquiry Fields.*

# 3.1 Account Status (Base Funds)

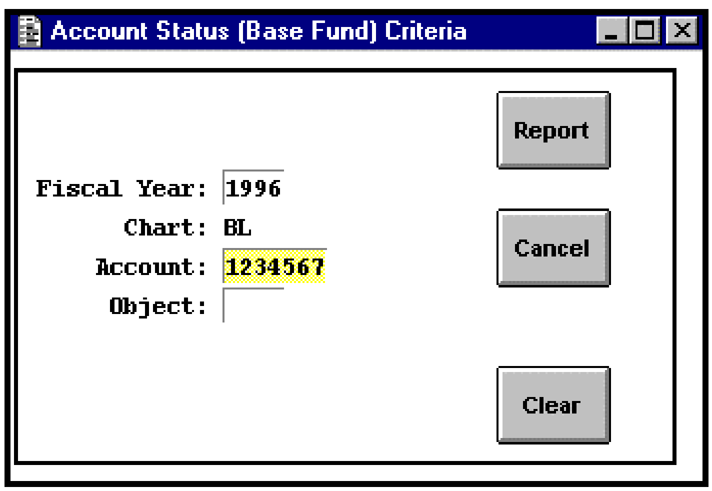
This inquiry compares the base budget for each Labor object code to the total Calculated Salary Foundation (CSF).

The base budget for the object code is established at budget construction time as an aggregate amount for all people and vacant lines within the account and object code. It can be adjusted during the year as changes occur in the accounts, or it can remain the same to be adjusted again at the time of budget construction.

The Calculated Salary Foundation (CSF) amount is also calculated based on PAF activity in order to create the amount to be used in budget construction for the next year for each person, position, and account. For example, if a position is reclassified during the year, and a pay increase is processed, the CSF for that amount will be increased. The base budget may or may not also be increased.

Clicking on the “Account Status: Base Funds” button will bring up a dialog window asking you to provide specific criteria in order to access the report. Double-clicking on the blank “Account” and “Object” fields will access a search screen.

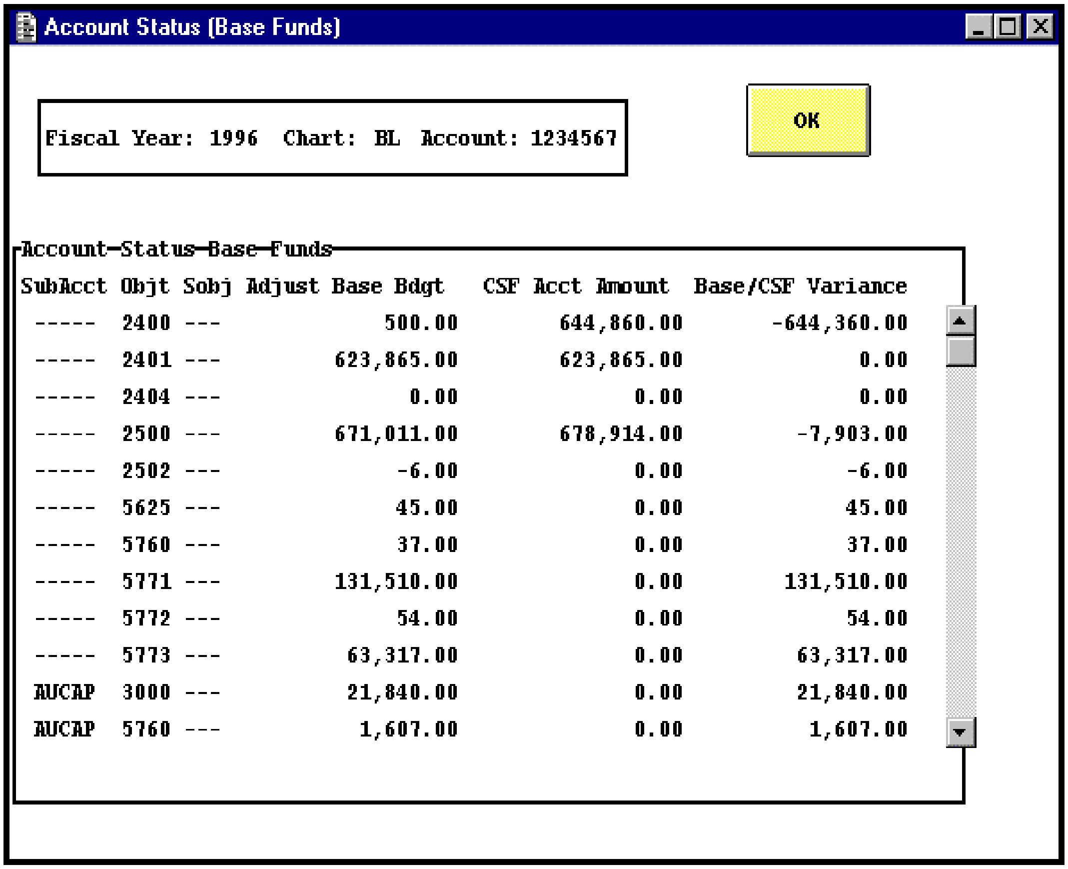
When you fill in the account number, and press the “Tab” key, the chart code will be automatically returned to the “Chart” field.




Only the “Fiscal Year” and “Account” fields are required on the “Account Status (Base Fund) Criteria” screen.

NOTE: Entering an object code in the “Object” field does not limit the report to that object code. All object codes in the account are returned to the “Account Status (Base Funds) report (*see following page*).

Clicking on the “Report” button accesses the “Account Status (Base Funds)” report:


Account Status (Base Funds)

OK

Fiscal Year: 1996 Chart: BL Account: 1234567

Account-Status-Base-Funds

| SubAcct | Objt | Sobj | Adjust Base Bdgt | CSF Acct Amount | Base/CSF Variance |
|---|---|---|---|---|---|
| ----- | 2400 | --- | 500.00 | 644,860.00 | -644,360.00 |
| ----- | 2401 | --- | 623,865.00 | 623,865.00 | 0.00 |
| ----- | 2404 | --- | 0.00 | 0.00 | 0.00 |
| ----- | 2500 | --- | 671,011.00 | 678,914.00 | -7,903.00 |
| ----- | 2502 | --- | -6.00 | 0.00 | -6.00 |
| ----- | 5625 | --- | 45.00 | 0.00 | 45.00 |
| ----- | 5760 | --- | 37.00 | 0.00 | 37.00 |
| ----- | 5771 | --- | 131,510.00 | 0.00 | 131,510.00 |
| ----- | 5772 | --- | 54.00 | 0.00 | 54.00 |
| ----- | 5773 | --- | 63,317.00 | 0.00 | 63,317.00 |
| AUCAP | 3000 | --- | 21,840.00 | 0.00 | 21,840.00 |
| AUCAP | 5760 | --- | 1,607.00 | 0.00 | 1,607.00 |

Any new activity is reflected in the “CSF Acct Amount” column with the variance (positive or negative) in the “Base/CSF Variance” column.

Double-clicking on the “CSF Acct Amount” column accesses the more detailed “CSF Tracker Inquiry” report (for more information about the “CSF Tracker Inquiry” report, see *Section 2.1*).

NOTE: if there are more object codes (and thus lines of data) than can fit on the screen, a scroll bar will appear to the right of the screen. Use the scroll bar to scroll down and view any information that does not appear on the original screen.

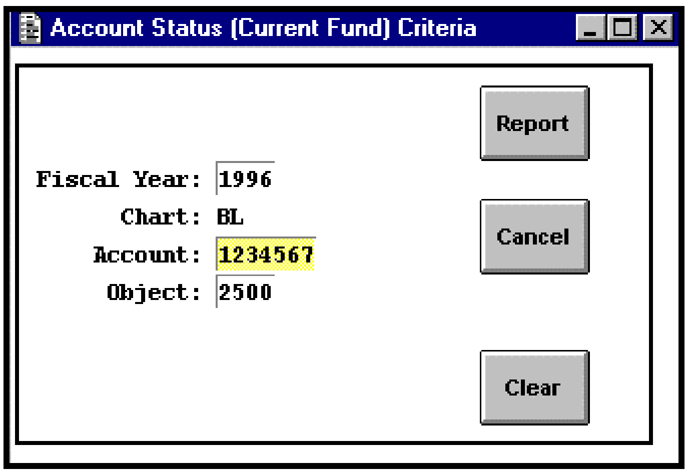
For more detailed information about the Account Status (Base Funds) fields, please see *Appendix B2: Account Status (Base Funds) Fields*.

## 4.1 Account Status (Current Year Funds)

This report lists the people paid on a specific account and object code. The "Account Status (Current Year Funds)" report shows all activity for a month, including all actual expenditures and encumbrances.

Clicking on the "Account Status: Current Funds" button will bring up a dialog window asking you to provide information about the report you wish to see. Double-clicking on the blank "Account" and "Object" fields accesses search screens. From these screens, the valid values will be returned to the criteria fields. Filling in the account number and pressing the "Tab" button causes the "Chart" field to be system retrieved.

NOTE: Because the object code is required for this report, a valid labor object code must be entered in the "Object" field. If you are not sure of the object code, double-clicking on the blank field accesses a lookup screen.




Clicking on the "Report" button once the valid codes have been returned to the criteria window accesses the "Account Status (Current Year Funds)" screen.

**Account Status (Current Year Funds)**

Fiscal Year: 1996 Chart: UA Account: 1234567 Object: 2500

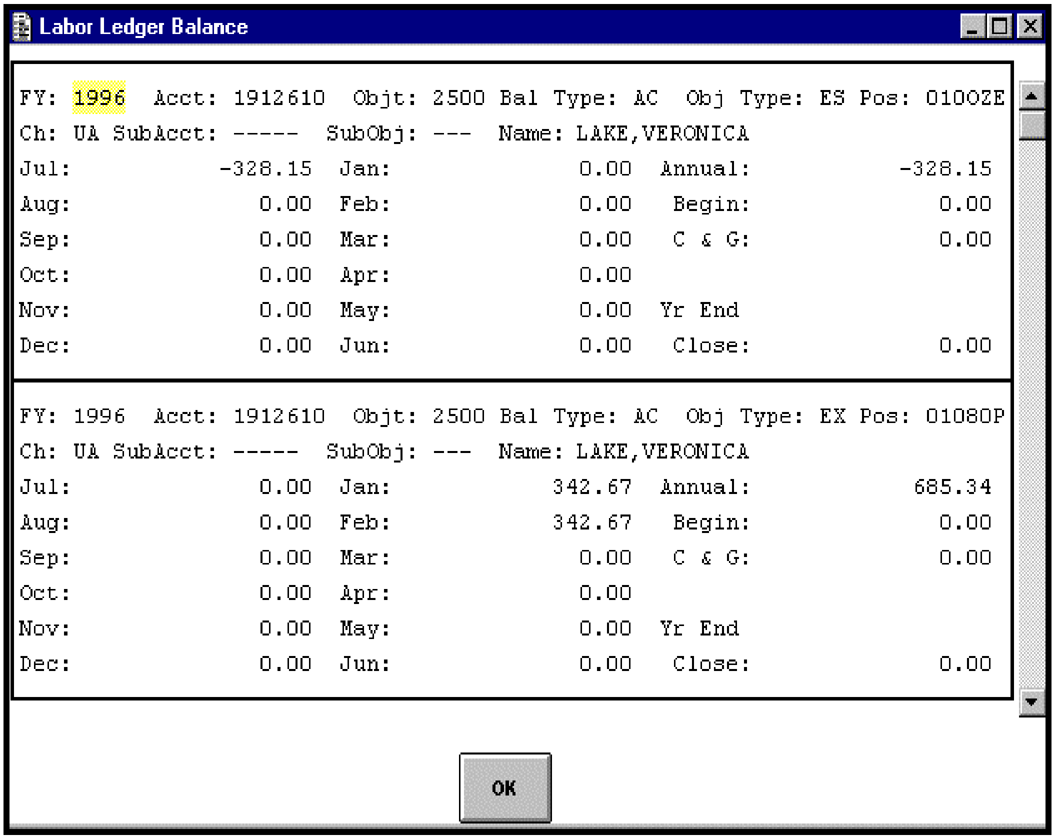
OK

Labor-Ledger-Balances

| Sub Acct | Sub Obj | Person | Position | YTD Actual | Outstanding Encum |
|---|---|---|---|---|---|
| ----- | --- | STANWICK,BARBARA | 0107AH | 14,472.04 | 10,612.80 |
| ----- | --- | NOVAK,KIMBERLY | 0107SM | 12,672.00 | 9,292.80 |
| ----- | --- | RUTHERFORD,MARGAR | 0107U8 | 13,584.00 | 9,961.60 |
| ----- | --- | LAKE,VERONICA | 01080P | 685.34 | 3,769.70 |
| ----- | --- | DORS,DIANA SHAR | 01080Q | 13,056.00 | 9,574.40 |
| ----- | --- | SIMPSON,MARGE L | 01081H | 15,492.00 | 11,360.80 |
| ----- | --- | JOHNSON,SHEILA P | 0108P5 | 11,642.40 | 8,624.00 |
| ----- | --- | LOCKWOOD,MARGARET | 010980 | 11,328.00 | 8,307.20 |
| ----- | --- | WHITE,BETTY JEAN | 0109BL | 12,588.02 | 9,231.20 |
| ----- | --- | KERR,DEBORAH F | 010NKN | 15,972.02 | 11,712.80 |
| ----- | --- | LAKE,VERONICA | 010OZE | 4,454.61 | 0.00 |
| ----- | --- | FIELDS,GRACE ANN | LG2500 | 2,038.40 | 0.00 |

For more detailed information about the Account Status (Current Year Funds) fields, please see *Appendix B3: Account Status (Current Year Funds) Fields*.

Double-clicking on "YTD Actual" field on the "Account Status (Current Year Funds)" screen accesses the "Labor Ledger Balance" screen which details compensation information for the employee/position on a month to month basis for the selected fiscal period:

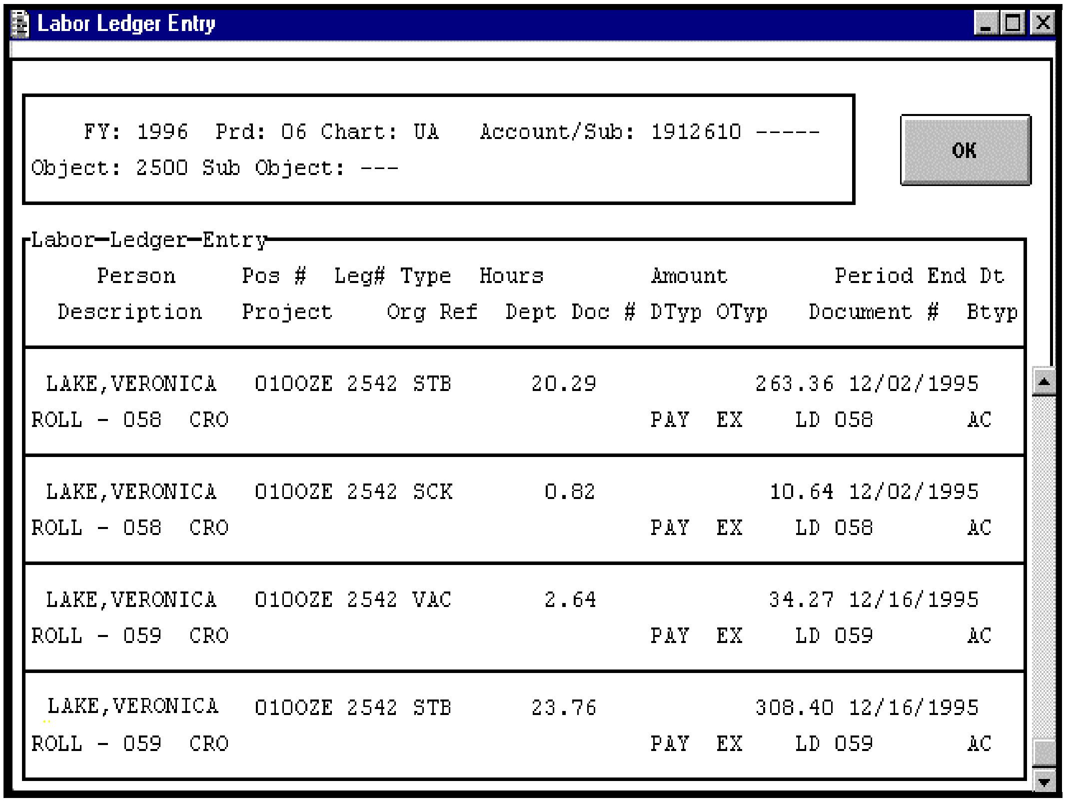



If an employee is paid from several accounts/sub-accounts, you may need to use the scroll bar at the right of the screen to access information that is not directly visible on the screen.

NOTE: The negative amount in the July column corresponds to the object type ES (Expenditure not Expense). The end of the fiscal year (June) accrual is reversed out in July. In other words, monies earned in June (old fiscal year) but actually paid in July (new fiscal year) must be reflected in the prior year's ledger balance.

For more detailed information about the "Labor Ledger Balance" fields, please see *Appendix B4: Labor Ledger Balance Fields*.

Double-clicking on the monthly amount accesses detailed ledger entry information for the employee/position.  This report shows how the employee/position has been compensated during the course of a particular pay period.



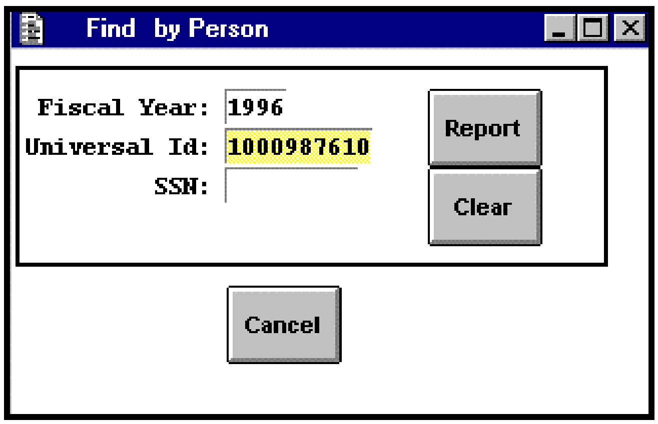

In the above example, the individual is a staff member who is paid bi-weekly (as denoted by the code “STB” in the “Type” column.  These codes are supported by the “Payroll Earnings Type” table. The monetary amounts  following the “STB” code reflects compensation for actual work time; the amount following the “SCK” code is compensation for time off through sickness, while “VAC” indicates vacation pay. Since only four rows of information will fit on the screen, the scroll bar allows the user to scroll down to view more information about activity for this employee during the month.

For more detailed information about the Account Status (Current Year Funds) fields, please see *Appendix B5: Labor Ledger Entry Fields*.

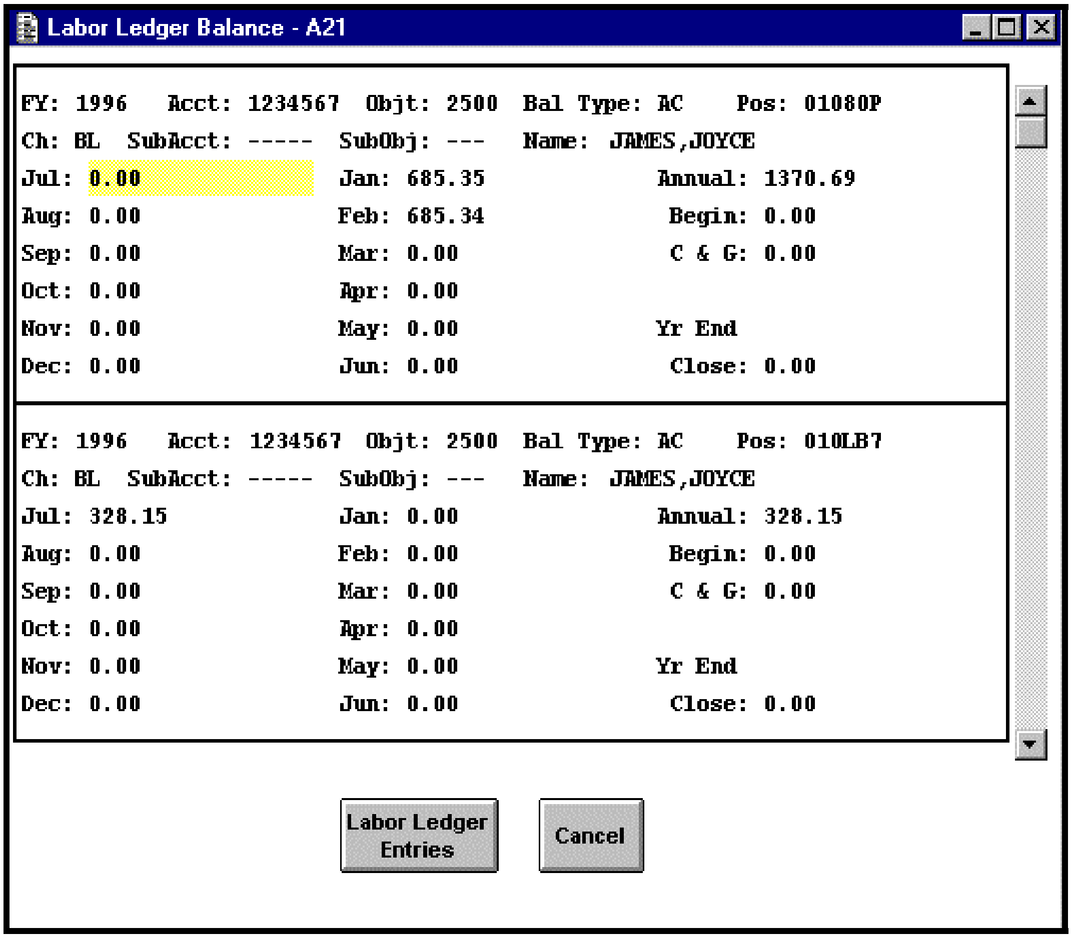
# 5.1 Labor Ledger A21 View

The “Labor Ledger A21 View” report reflects the actual period for which compensation is paid on an account, whereas the “Labor Ledger View” report (see *Section 6.1: Labor Ledger View*) shows compensation in the fiscal period in which the money was posted to the Labor Ledger. For example, if a “Salary Transfer” document is processed for an employee in March, 1996 that moves December, 1995 payroll monies, this transaction will be reflected in December, 1995 in the “Labor Ledger A21 View.”

Clicking on the “Labor Ledger A21 View” button accesses the “Find by Person” criteria window which is the starting point for viewing compensation for an individual.




“Fiscal Year,” and either “Universal Id” or “SSN” (Social Security Number) are required fields. Clicking on the blank “Universal ID” field will bring up the “Universal User Lookup” screen, offering the user the options of searching by name, campus and/or department. Entering the criteria in the fields and clicking on the “Report” button accesses the “Labor Ledger Balance A21” screen.

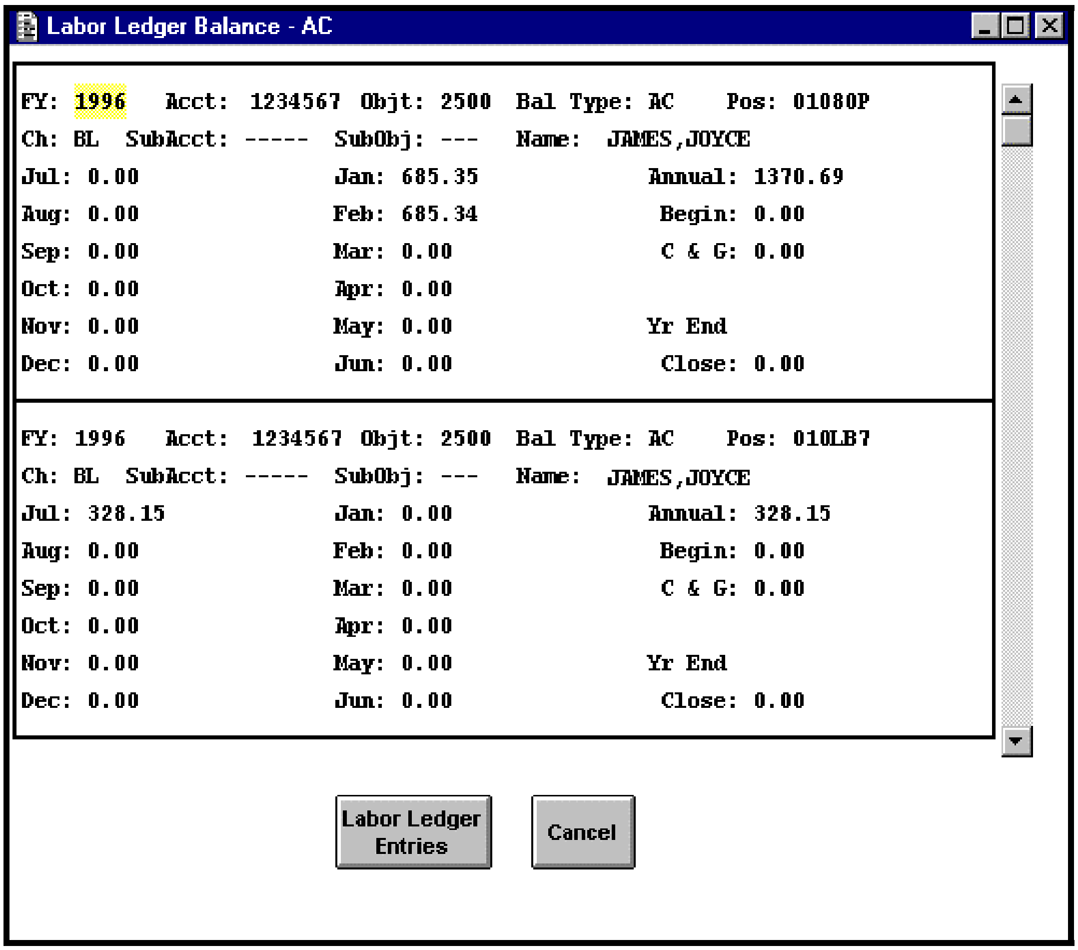



Placing the cursor on a line and clicking the "Labor Ledger Entries" button, accesses the "Labor Ledger Entry" screen (see *Section 4.1: Account Status (Current Funds),* page 17).

The fields for the "Labor Ledger Balance-A21" screen are the same as for the Labor Ledger Balance screen (see *Appendix B4: Labor Ledger Balance Fields*).

# 6.1 Labor Ledger View

Clicking on this button will access the “Find by Person” criteria window (see *Section 5.1: Labor Ledger A21 View*). Entering the applicable criteria in the appropriate fields, or via the “Universal User Lookup” search screen, and then clicking on the “Report” button accesses the “Labor Ledger Balance-AC” screen:



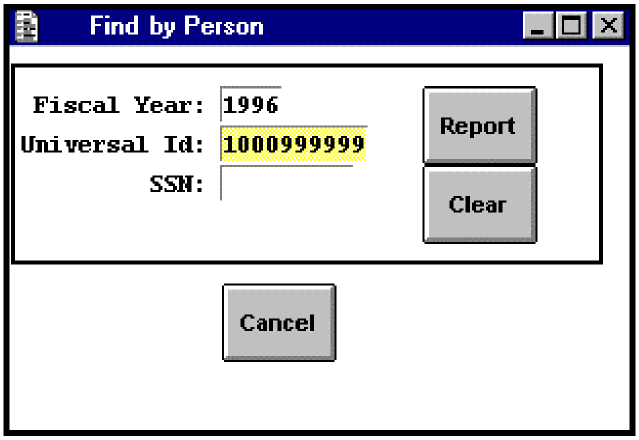

Placing the cursor on a line and clicking the “Labor Ledger Entries” button, accesses the “Labor Ledger Entry” screen (see *Section 4.1: Account Status (Current Funds),* page 17).

The fields for the “Labor Ledger Balance-AC” screen are the same as for the Labor Ledger Balance screen (see *Appendix B4: Labor Ledger Balance Fields*).

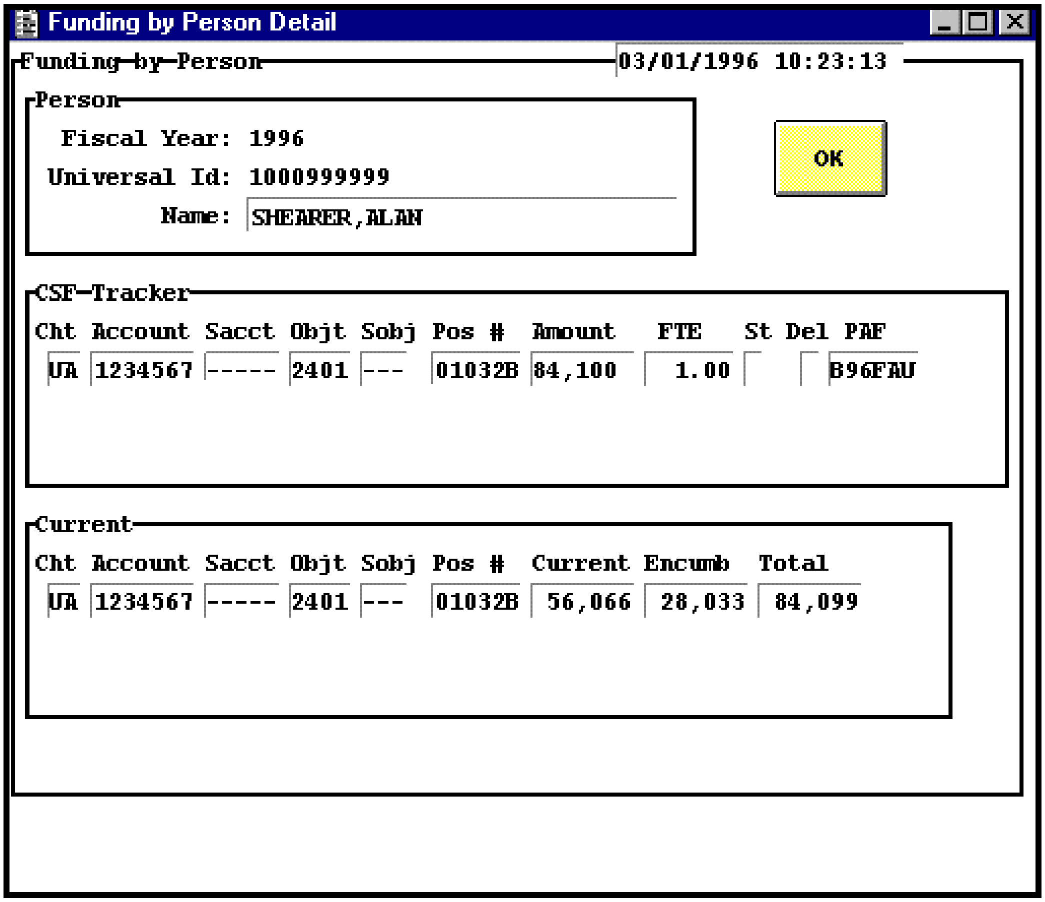
## 7.1 Funding By Person

This button allows the user to track funding for an employee within the university system by using the individual's universal identification number or social security number.

Clicking on the "Funding by Person" button accesses the "Find By Person" criteria window:




"Fiscal Year," and either "Universal Id" or "SSN" (Social Security Number) are required fields. Clicking on the blank "Universal ID" field will bring up the "Universal User Lookup" screen, offering the user the options of searching by name, campus and/or department. Entering the criteria in the fields will access the "Funding by Person Detail" screen.



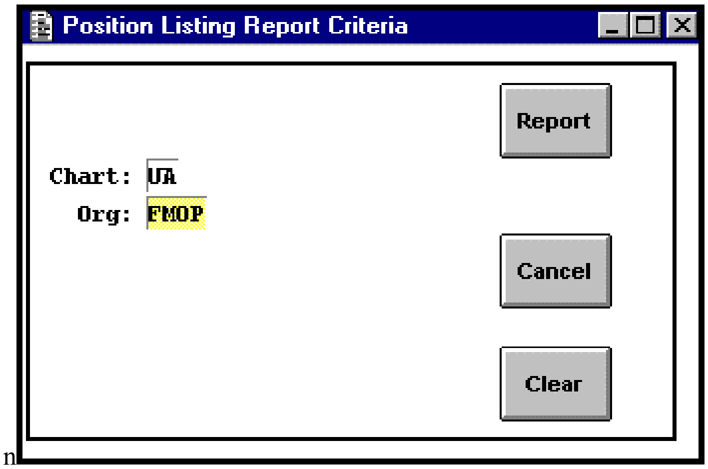

This screen details funding for a person by account, sub-account, object code, and by fiscal year.

For more detailed information about the "Funding By Person" fields, please see *Appendix B.6: Funding By Person Fields*.

# 8.1 Position Listing By Organization

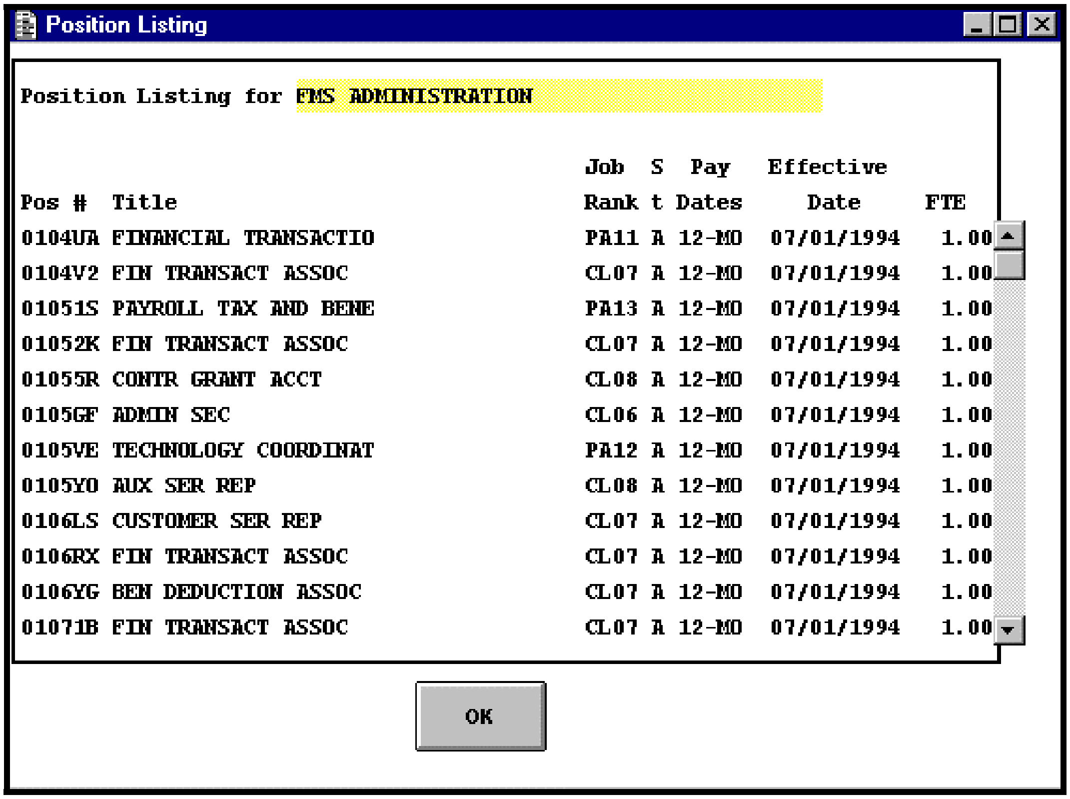
The "Position Listing by Organization" report allows positions to be defined and tracked by position managers.

Clicking on the "Position Listing by Organization" button accesses a dialog window asking you to provide information about the report you wish to see.




The "Chart" and "Org " fields are required fields. Double-clicking on the "Chart" field accesses a lookup table; double-clicking on "Org" accesses a search screen. From these screens, the valid values will be returned to the criteria fields.

Clicking on the "Report" button once the valid codes have been returned to the criteria window will access the "Position Listing" report. This report provides information about each position within a department or organization.



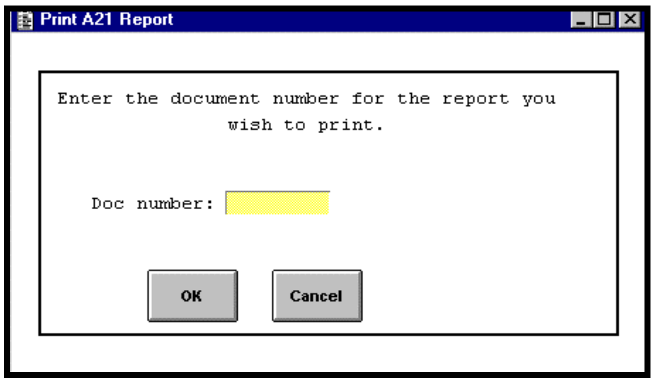

(For more detailed information about the “Position Listing By Organization” fields, please see *Appendix B.7: Position Listing By Organization Fields*.)

Clicking on the “Position #” field accesses the “Position Inquiry” screen, which provides more detailed information about that position.

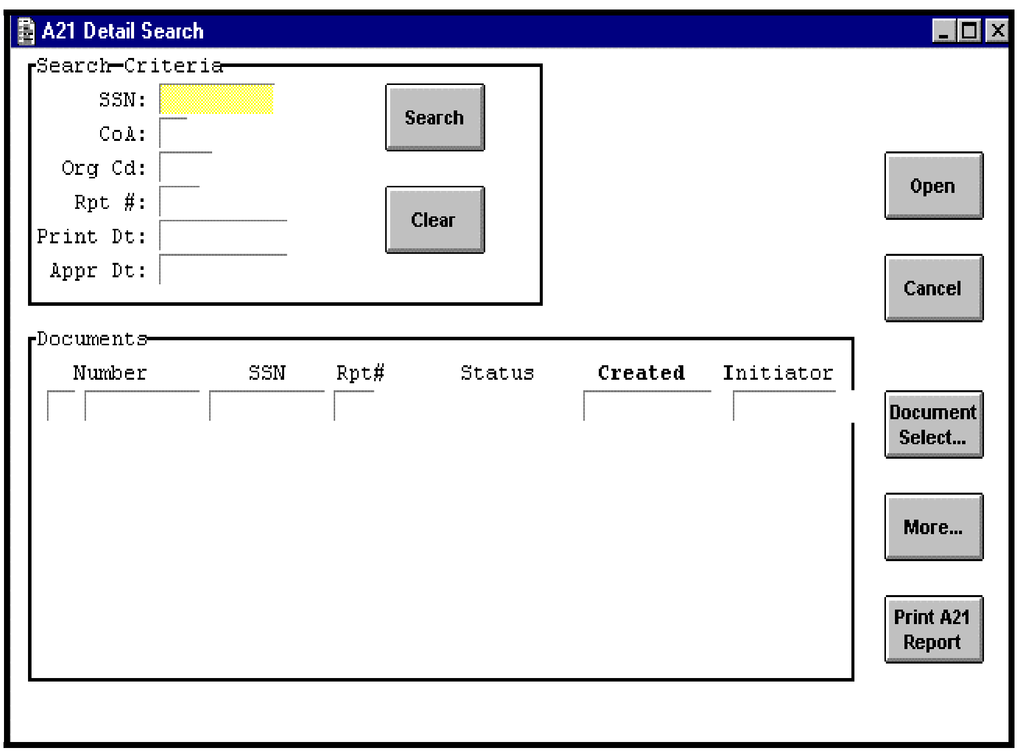
NOTE: The “Position Inquiry” screen can also be accessed directly by clicking on the “Position Inquiry” Button at the Labor Distribution Report Menu. See *Section 16.1: Position Inquiry* for more information on the use of the “Position Inquiry” screen.

## 9.1 A21 Document Print

The A21 Activity Report verifies activity on different accounts over a specified time. It is required by the federal government to justify expenses. Clicking on the “A21 Document Print” button at the “Labor Distribution Report Menu” accesses the “Print A21 Report” criteria window. If you know the document number for the report you wish to print, simply enter the number in the "Doc Number" field and click on the "OK" button.




If you do not know the document number, click on the blank field and the following search screen will appear, allowing you to perform a search by entering a variety of criteria:



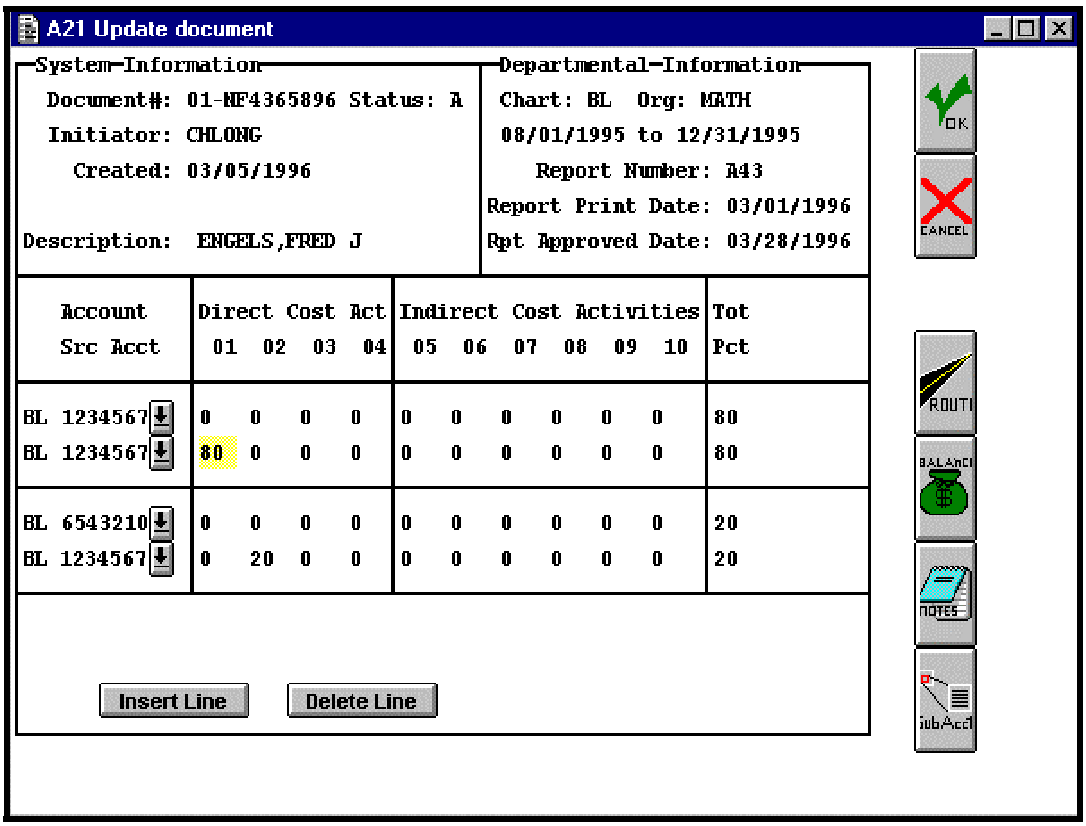

A search can be performed using any of the available criteria. Once you have retrieved the document number (or document numbers) you wish to view, you can either:

- place the cursor on the document number, and click on the "Print A21 Report" button (NOTE: a blank "Personnel Activity Report" template must be placed in the printer for each report printed prior to printing)

- find out more information about the document by clicking on the "More" button

- create a new A21 document by clicking on the "Document Select" button

- view the document on-line, by clicking on the "Open" button

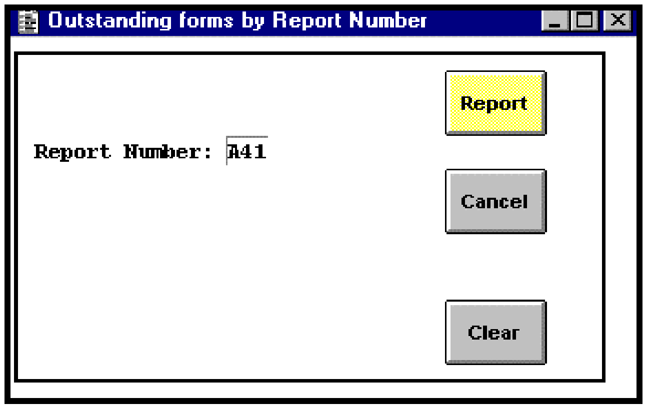



This on-line report verifies where an individual's activity is performed, and from where the individual is reimbursed, by account. In the above example, we can see that 80% of the individual's activity is both done in, and paid out of, account number 1234567, while 20% of the effort is done in account number 6543210 but paid out of account number 1234567.

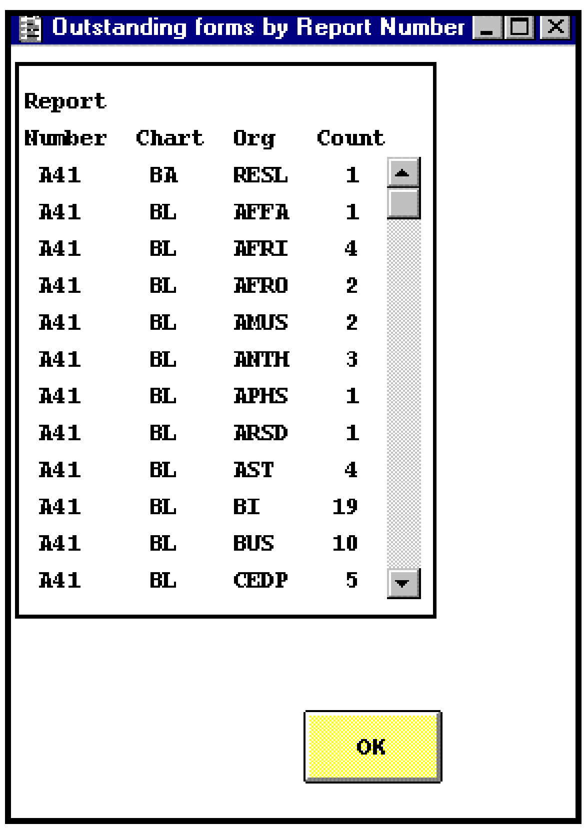
For more detailed information about the "A21 Update document" fields, please see *Appendix B8: A21 Update Document Fields*.

## 10.1 Outstanding Forms By Report Number

This button allows central processing personnel to locate A21 reports (personnel activity or effort reports) that are still outstanding (i.e. those which have not yet been returned to the central processing office) by entering the report number in the criteria window below:

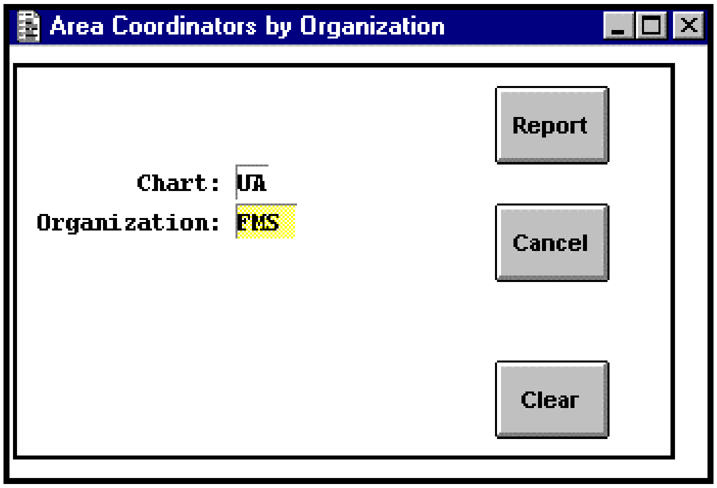



Double-clicking on the blank “Report Number” field accesses a pick list of available A21 reports. Entering the report number and clicking on the "Report" button accesses a pick list of outstanding reports by chart, organization, and number of reports outstanding. This information assists central processing in locating and retrieving outstanding reports.

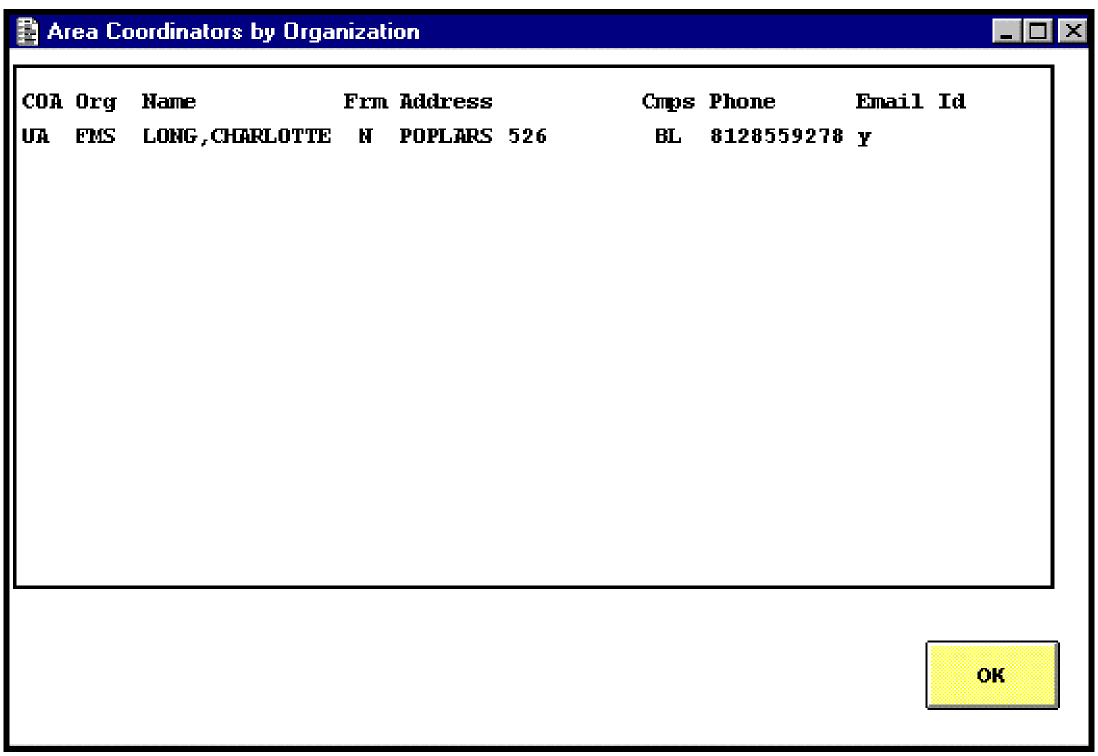


## 11.1 Area Coordinators By Organization

This button allows the user to identify the area coordinator responsible for A21 reports by organization. Enter both the chart and organization information in the relevant fields of the criteria window below:



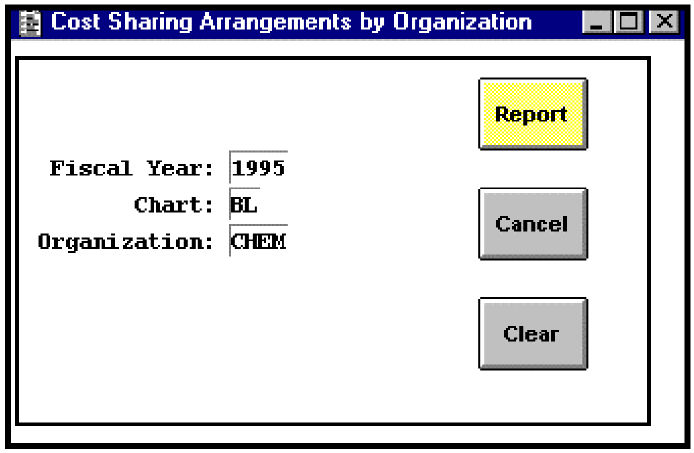

The following screen will be accessed which provides detailed information about the area coordinator for the selected organization.



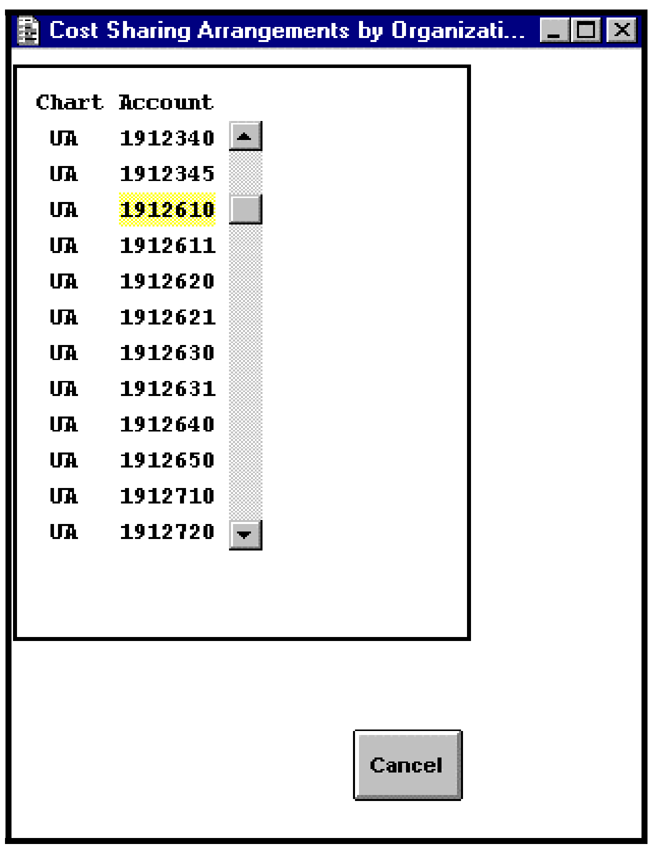

For more detailed information about the "Area Coordinators By Organization" fields, please see *Appendix B9: Area Coordinators By Organization Fields*.

## 12.1 Cost Sharing Arrangement By Org

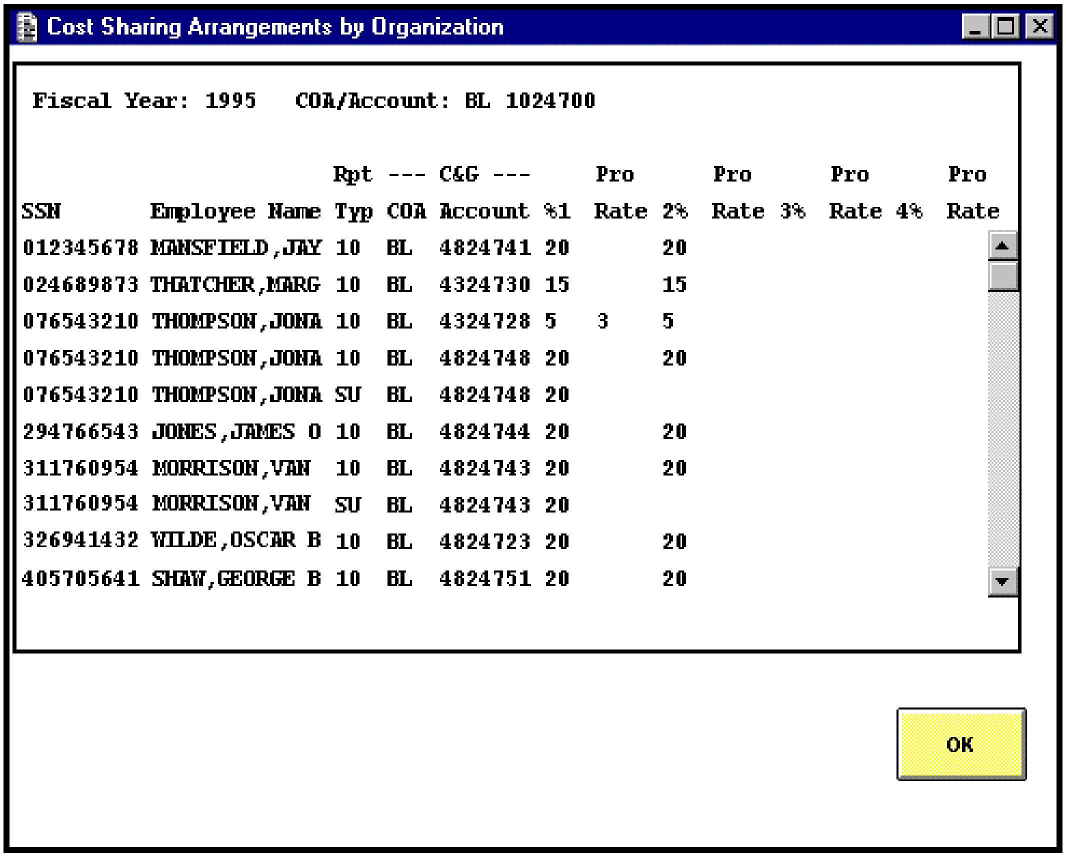
This button allows the user to locate accounts and/or projects which are jointly funded by a university department, and by other (e.g. the federal government) funds.  Required fields are "Fiscal Year," "Chart," and "Organization."




Clicking on "Report" after entering the field criteria, will access a pick list of accounts within the selected organization.



Clicking on an account number will access the “Cost Sharing Arrangements by Organization” screen.


Cost Sharing Arrangements by Organization

Fiscal Year: 1995 COA/Account: BL 1024700

| SSN | Employee Name | Rpt Typ | --- C&G --- COA | Account | %1 | Pro Rate | 2% | Pro Rate | 3% | Pro Rate | 4% | Pro Rate |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 012345678 | MANSFIELD,JAY | 10 | BL | 4824741 | 20 | | 20 | | | | | |
| 024689873 | THATCHER,MARG | 10 | BL | 4324730 | 15 | | 15 | | | | | |
| 076543210 | THOMPSON,JONA | 10 | BL | 4324728 | 5 | 3 | 5 | | | | | |
| 076543210 | THOMPSON,JONA | 10 | BL | 4824748 | 20 | | 20 | | | | | |
| 076543210 | THOMPSON,JONA | SU | BL | 4824748 | 20 | | | | | | | |
| 294766543 | JONES,JAMES O | 10 | BL | 4824744 | 20 | | 20 | | | | | |
| 311760954 | MORRISON,VAN | 10 | BL | 4824743 | 20 | | 20 | | | | | |
| 311760954 | MORRISON,VAN | SU | BL | 4824743 | 20 | | | | | | | |
| 326941432 | WILDE,OSCAR B | 10 | BL | 4824723 | 20 | | 20 | | | | | |
| 405705641 | SHAW,GEORGE B | 10 | BL | 4824751 | 20 | | 20 | | | | | |

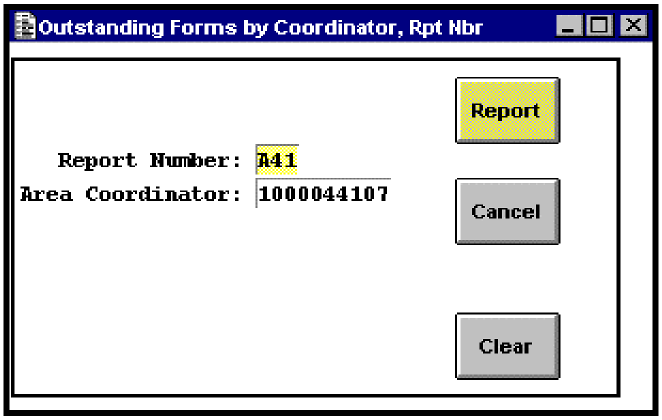
OK

This screen details cost-sharing information for the selected organization’s account, listing individuals who are funded from other organizations and accounts/projects, and the percentage of effort that is spent on those accounts/projects.

For more detailed information about the “Cost Sharing By Organization” fields, please see *Appendix B10: Cost Sharing By Organization Fields*.

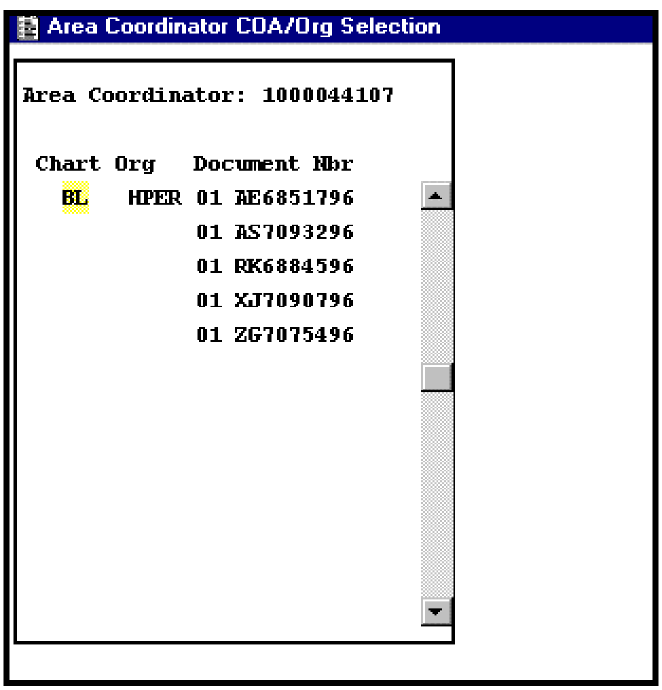
## 13.1 Outstanding Forms By Coordinator, Rpt Nbr

This button allows central processing personnel to locate personnel activity reports or effort reports that are still outstanding (i.e. those which have not yet been returned to the central processing office) by entering the report number and the universal ID of the area coordinator as criteria in the criteria window:

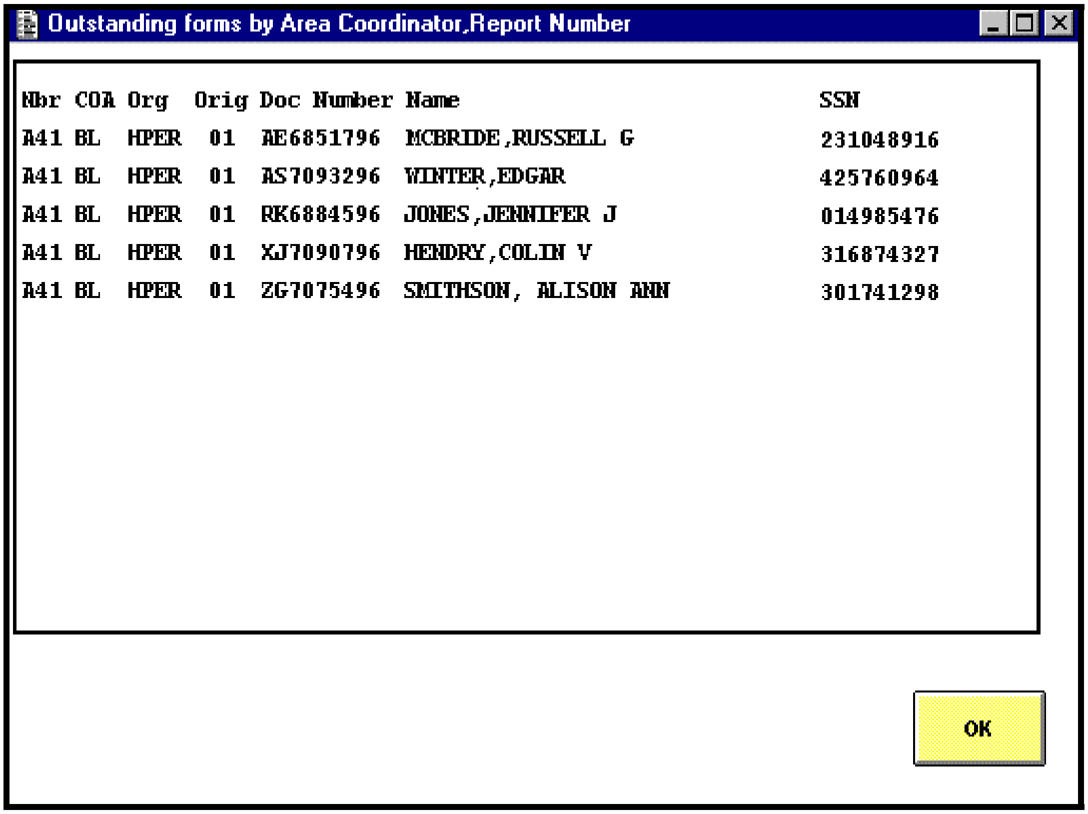



Double-clicking on the blank “Report Number” field accesses a pick list of available report numbers. If you do not know the universal ID of the area coordinator, double-click on the blank field for a lookup screen. Once you have identified the correct person, place your cursor on that person’s name and click “OK.” This will return the universal ID to the “Area Coordinator” field.

Clicking on the “Report” button after filling in the criteria fields accesses a screen which allows you to locate outstanding reports by chart and organization. Using the scroll bar moves you from organization to organization. Each organization lists outstanding reports by document number:



Double-clicking on a selected organization will access a screen listing all the personnel in that organization who have outstanding reports.



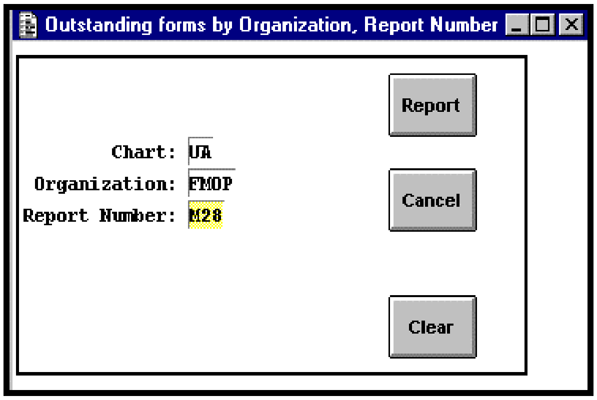

| Nbr | COA | Org | Orig | Doc Number | Name | SSN |
|---|---|---|---|---|---|---|
| A41 | BL | HPER | 01 | AE6851796 | MCBRIDE,RUSSELL G | 231048916 |
| A41 | BL | HPER | 01 | AS7093296 | WINTER,EDGAR | 425760964 |
| A41 | BL | HPER | 01 | RK6884596 | JONES,JENNIFER J | 014985476 |
| A41 | BL | HPER | 01 | XJ7090796 | HENDRY,COLIN V | 316874327 |
| A41 | BL | HPER | 01 | ZG7075496 | SMITHSON, ALISON ANN | 301741298 |



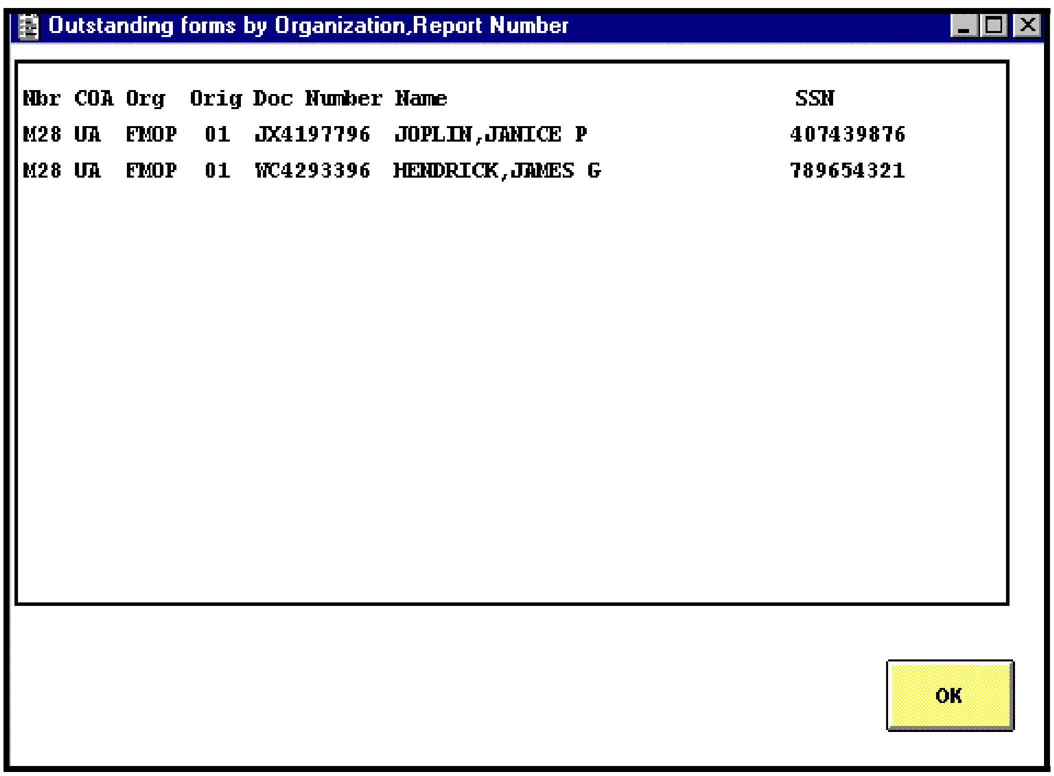
From this list, central processing can contact the area coordinator about the individuals whose forms are still outstanding and either request that the forms be returned, or issue replacement forms as necessary.

## 14.1 Outstanding Forms By Org, Report Number

This button allows central processing personnel to locate A21 reports that are outstanding by entering a report number and an organization code in the criteria window below:




Double-clicking on any field will bring up a search screen or pick list from which to select the correct information.  Clicking on the "Report" button accesses a screen listing all the personnel in that organization who have outstanding reports for the report number you selected.

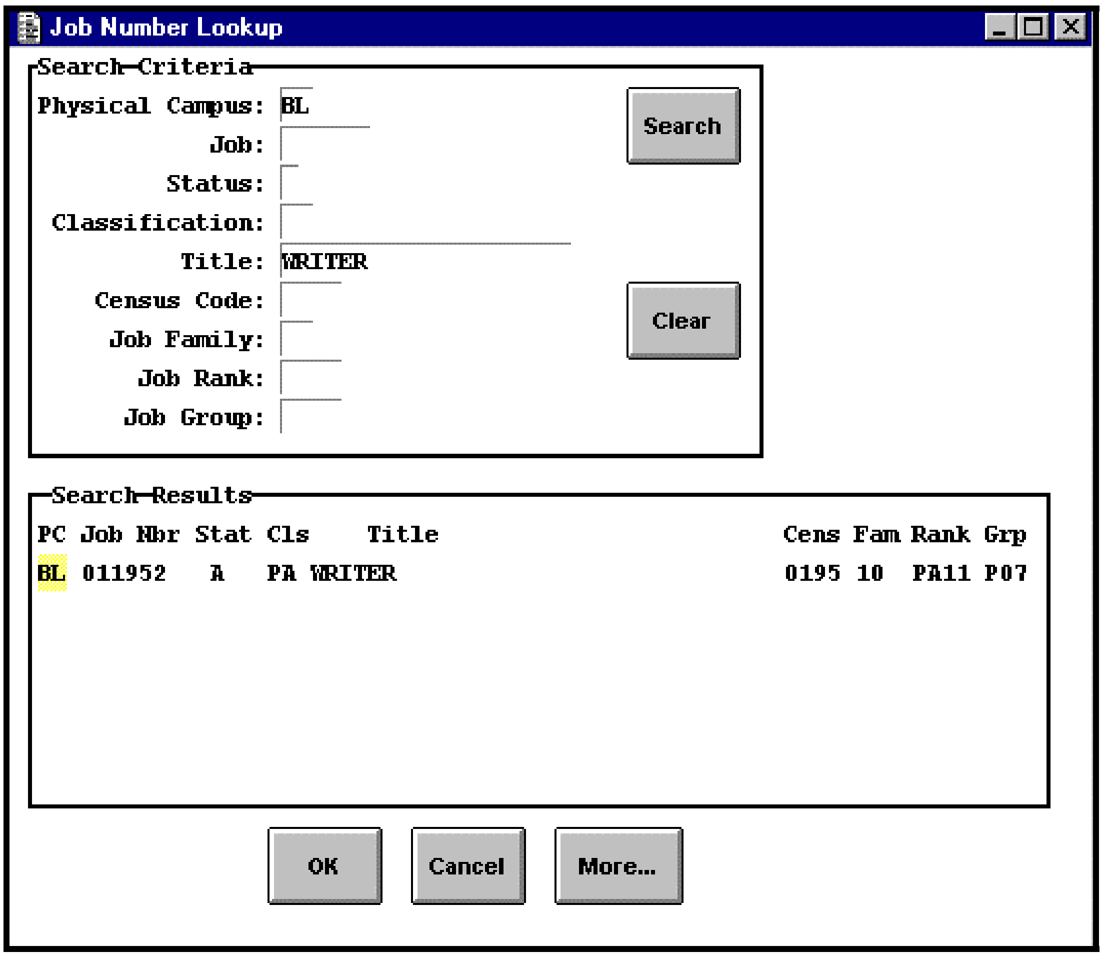



From this list, central processing can contact the individuals whose forms are outstanding and either request that the forms be returned, or issue replacement forms as necessary.

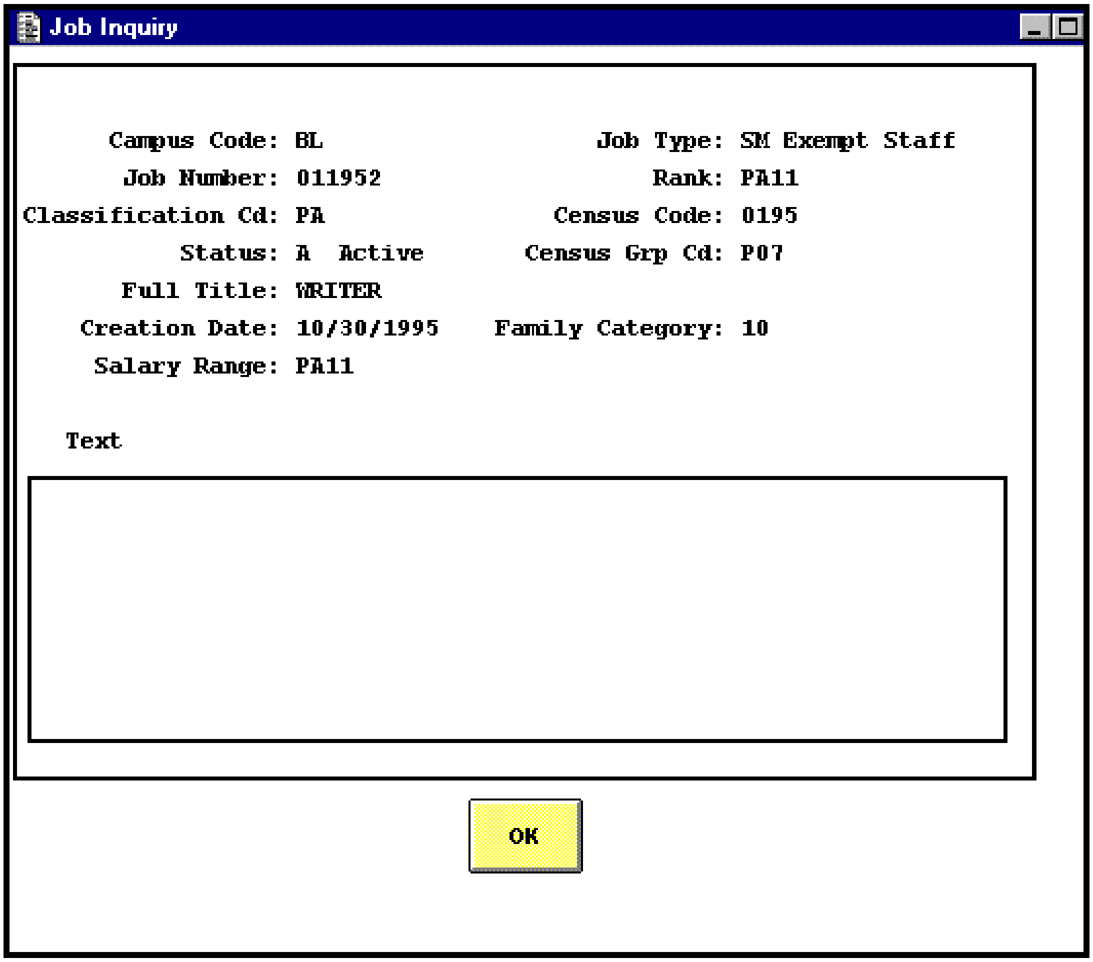
## 15.1 Job Inquiry

The “Job Inquiry” button allows the user to search for detailed information about a particular job.

Clicking on this button at the “Report Menu” screen accesses the “Job Number Lookup” screen. This screen allows the user to enter criteria which will enable him or her to locate the information required for a specific job.



Clicking on a line in the "Search Results" zone, and then clicking on the "More" button will take you to the "Job Inquiry" screen which provides detailed information about the job.



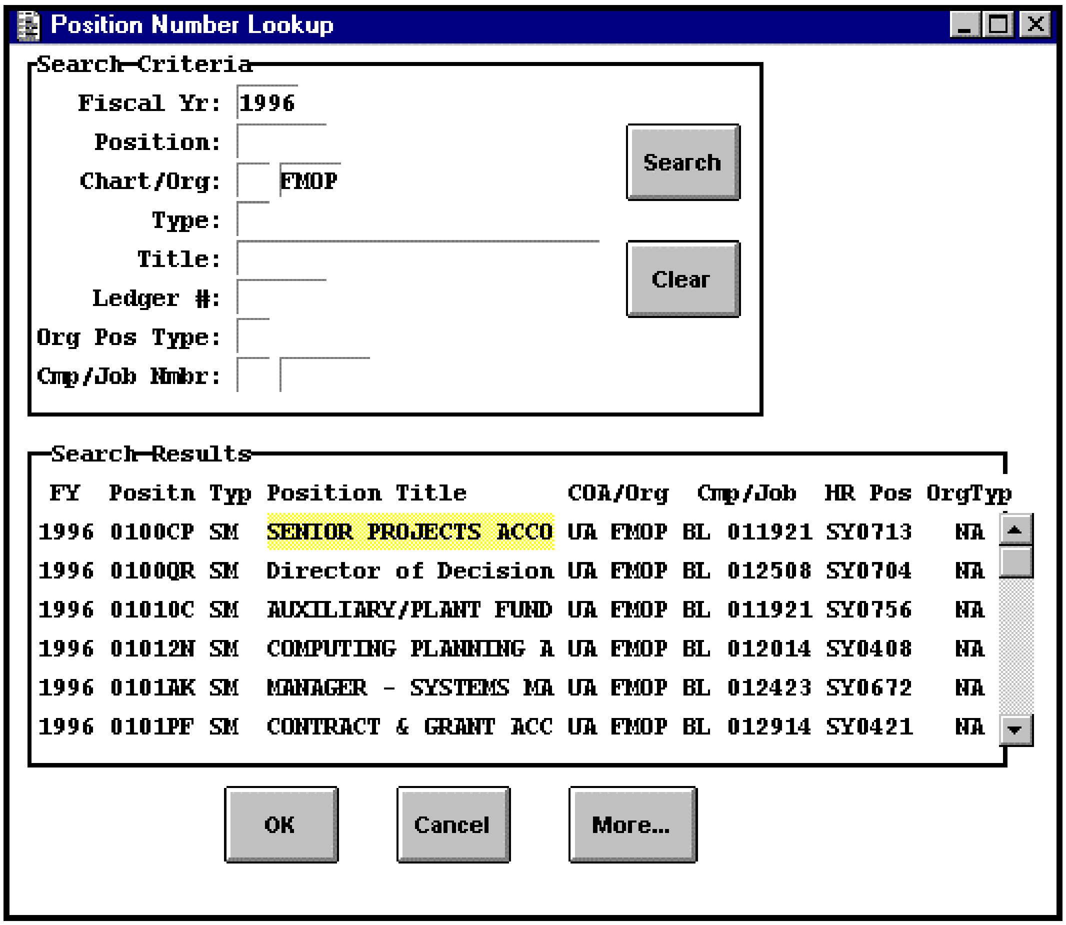

This report details and summarizes all the attributes associated with this particular job.

(For more detailed information about the fields on this screen, see *Appendix B.11: Job Inquiry Fields*).

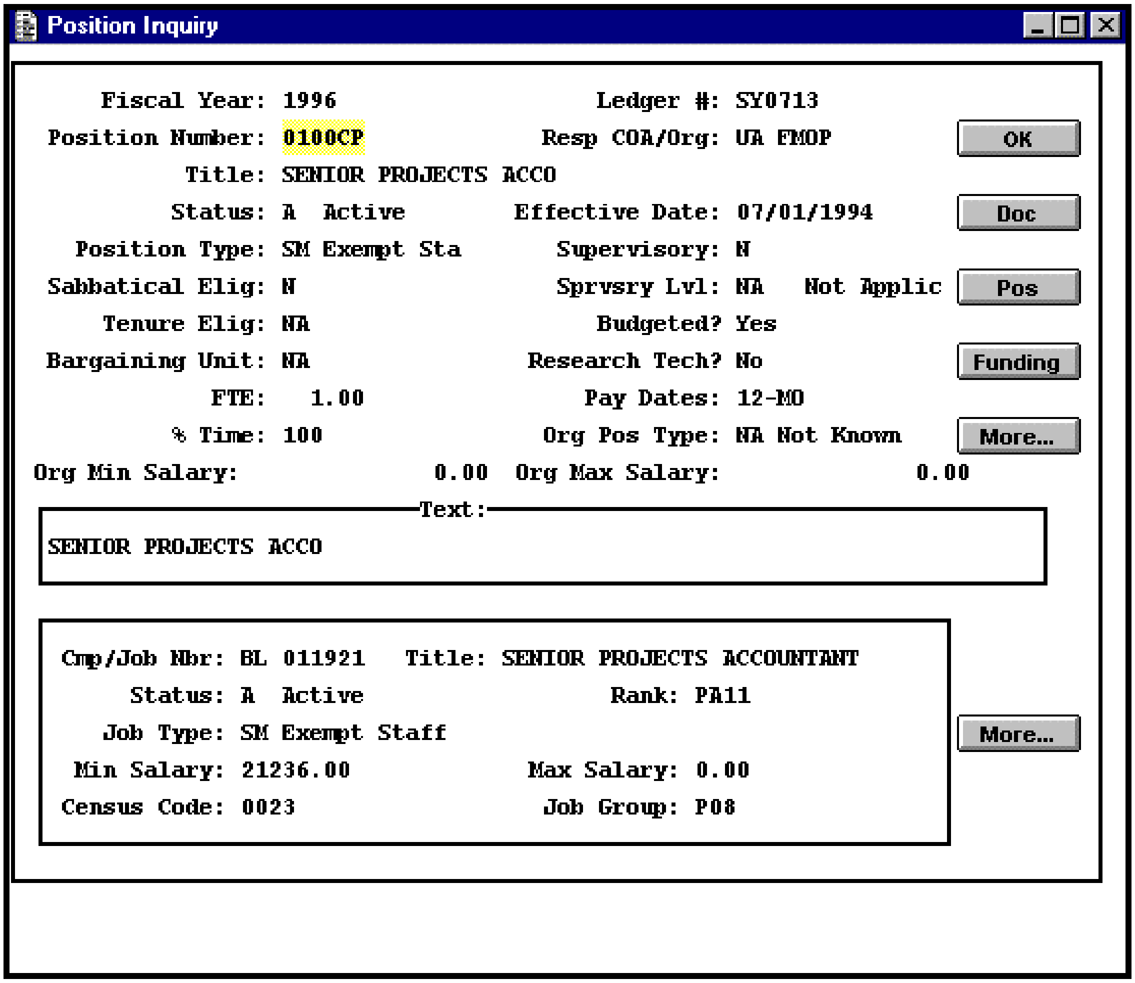
## 16.1 Position Inquiry

The “Position Inquiry” button allows the user to search for detailed information about a position.

Clicking on the button at the “Report Menu” screen will access the “Position Number Lookup” screen. Entering criteria in the “Search Criteria” field will bring up a list of positions within the parameters of the criteria supplied by the user.




Scrolling down to the appropriate position number in the “Search Results” zone, placing the cursor against that, and clicking on the “More” button accesses the “Position Inquiry” screen which provides detailed information about the selected position.



Position Inquiry

Fiscal Year: 1996 | Ledger #: SY0713
Position Number: 0100CP | Resp COA/Org: UA FMOP
Title: SENIOR PROJECTS ACCO
Status: A Active | Effective Date: 07/01/1994
Position Type: SM Exempt Sta | Supervisory: N
Sabbatical Elig: N | Sprvsry Lvl: NA Not Applic
Tenure Elig: NA | Budgeted? Yes
Bargaining Unit: NA | Research Tech? No
FTE: 1.00 | Pay Dates: 12-MO
% Time: 100 | Org Pos Type: NA Not Known
Org Min Salary: 0.00 | Org Max Salary: 0.00

OK | Doc | Pos | Funding | More...

Text:
SENIOR PROJECTS ACCO

Emp/Job Nbr: BL 011921 | Title: SENIOR PROJECTS ACCOUNTANT
Status: A Active | Rank: PA11
Job Type: SM Exempt Staff
Min Salary: 21236.00 | Max Salary: 0.00
Census Code: 0023 | Job Group: P08

More...

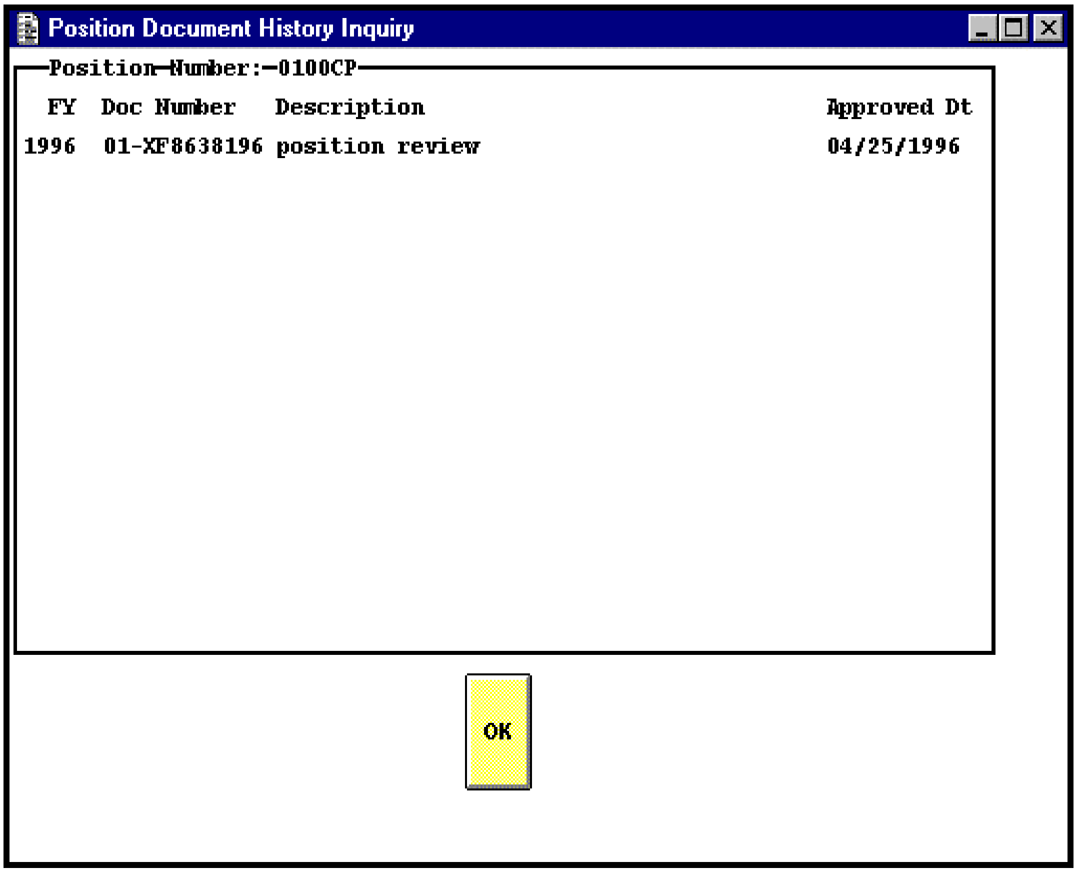
This report details and summarizes all the attributes associated with this particular position. (For more detailed information about the fields on this screen, see *Appendix B.12: Position Inquiry Fields*).

---

There are a number of "drill down" options from the "Position Inquiry" screen, which are accessed by clicking on a series of buttons to the right of the screen above.

## 16.2 Position Inquiry "Doc History" Button

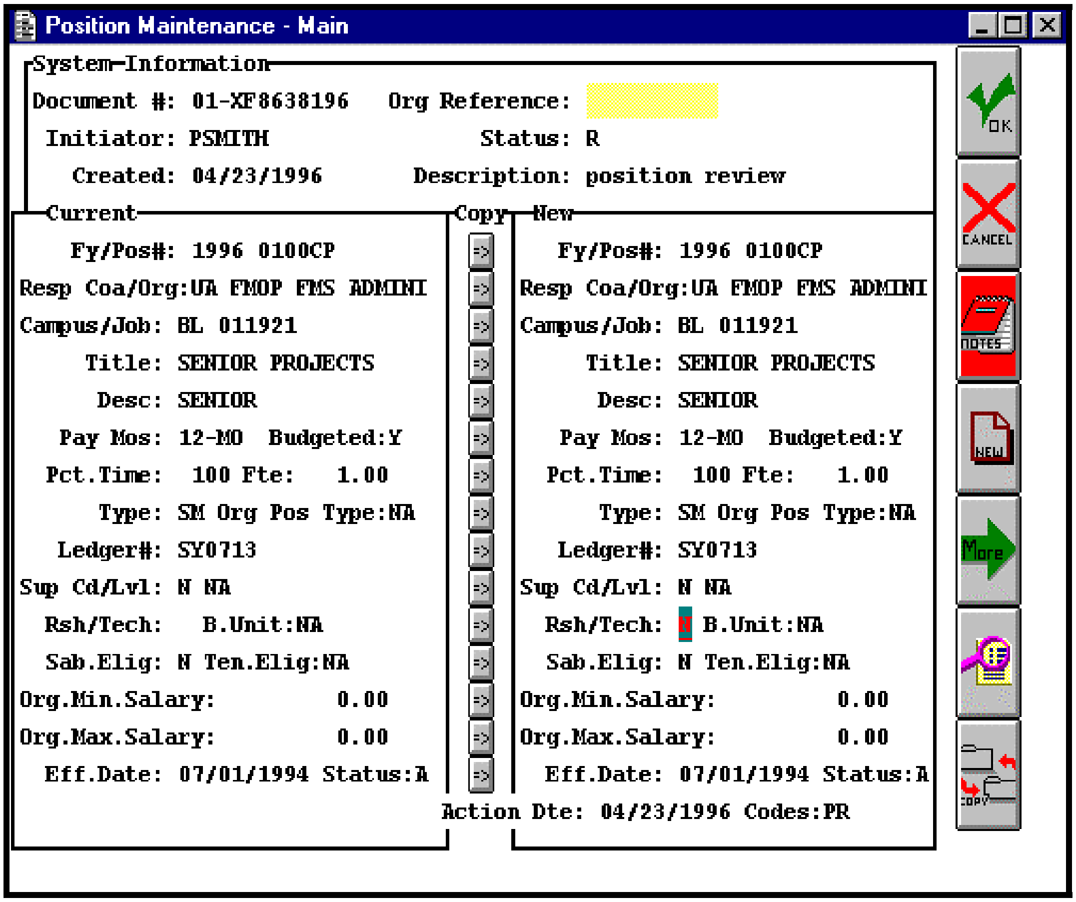
The "Doc History" button accesses the "Document History Inquiry" screen, which lists all the documents that have changed or modified a position over a period of time.




(For more detailed information about the fields in this screen, see *Appendix B.12.1: Document History Inquiry Fields*).

Double-clicking on the document number accesses the document which has modified this position.

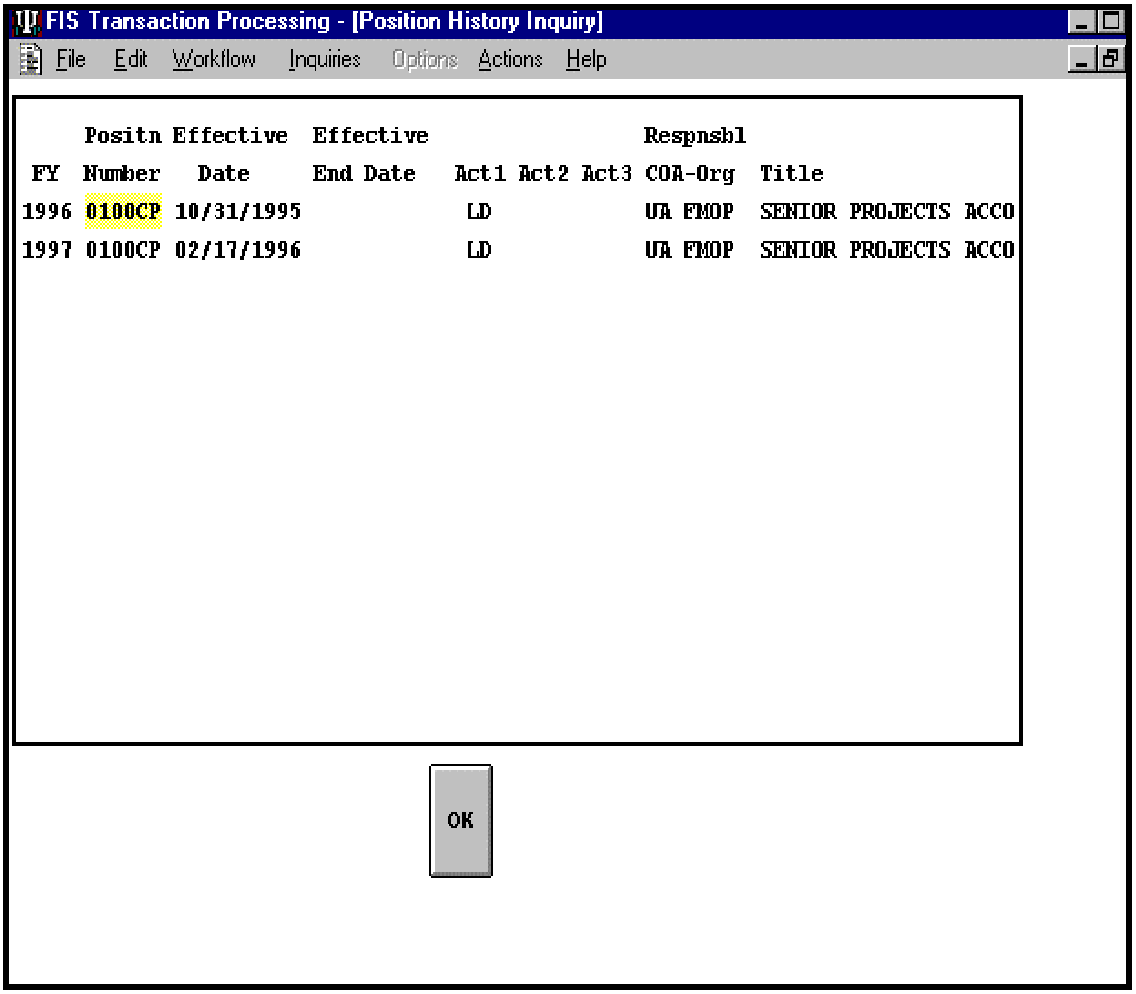
In this case, the position has been subject to a recent review, and, as a result, the "Position Maintenance" screen which details the review will appear.




(For detailed information on the fields in this screen, please see the *Position Maintenance* document).

## 16.3 Position Inquiry "Pos History" Button

The "Pos History" button accesses the "Position History Inquiry" screen which tracks a position over a period of time. The "Position History Inquiry" screen indicates when a position has changed, and shows the values attributed to a position before and after any changes.

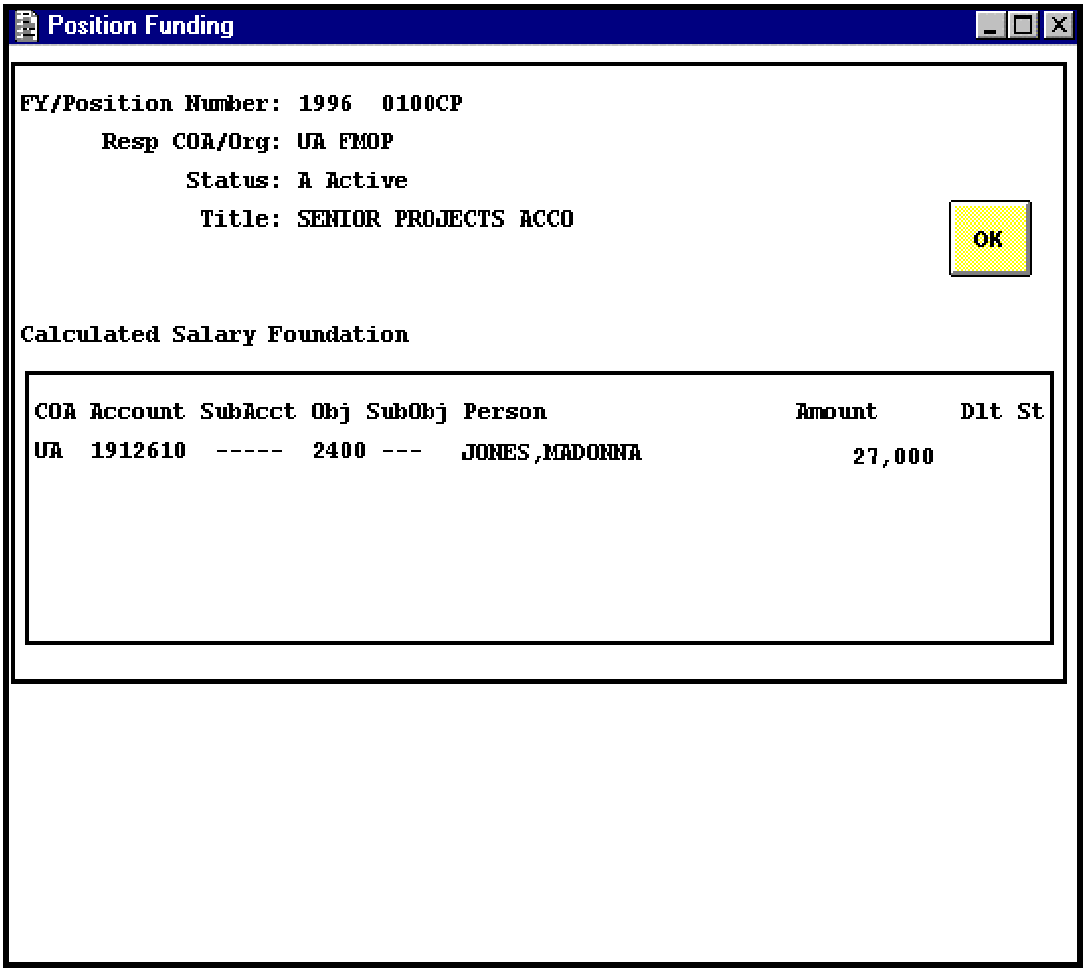



This example merely indicates that this position has been updated by fiscal year (hence no information about the position has changed other than the fiscal year).

(For more detailed information about the fields in this screen, see *Appendix B.12.2: Position History Inquiry Fields*).

## 16.4 Position Inquiry "Funding" Button

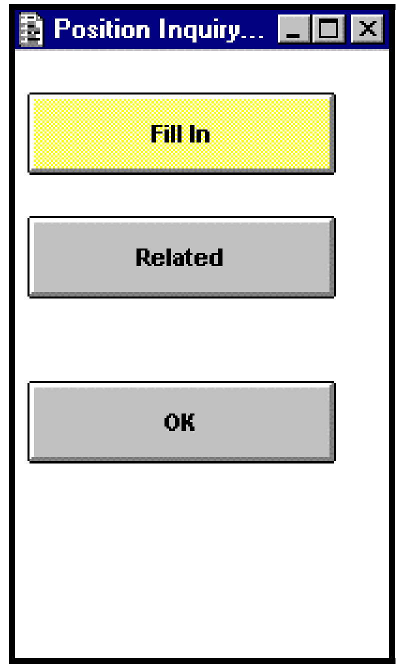
The "Funding" button accesses the "Position Funding" screen, which details account, salary, and incumbent information for the position.




(For more detailed information about the fields in this screen, see *Appendix B.12.3: Position Funding Fields*).

## 16.5  Position Inquiry “More” Buttons

There are TWO “More” buttons on the “Position Inquiry” screen.

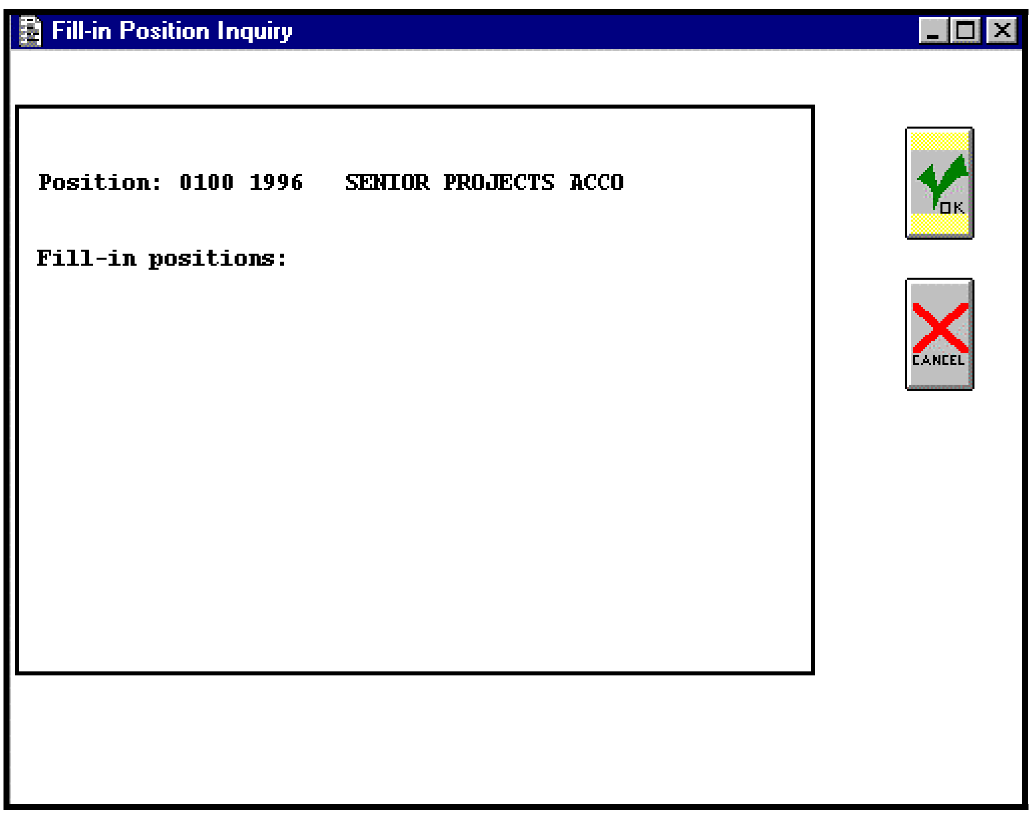



### 16.5A  “More” Button # 1

The first appears directly underneath the “Funding” Button.  Clicking on this “More” button brings up a window which allows you to access the “Fill-in Position” and “Related Position” screen options

### 16.5A(I)  “Fill-in Position” Button

Clicking on the “Fill In” button accesses the “Fill-in Position Inquiry” Screen:

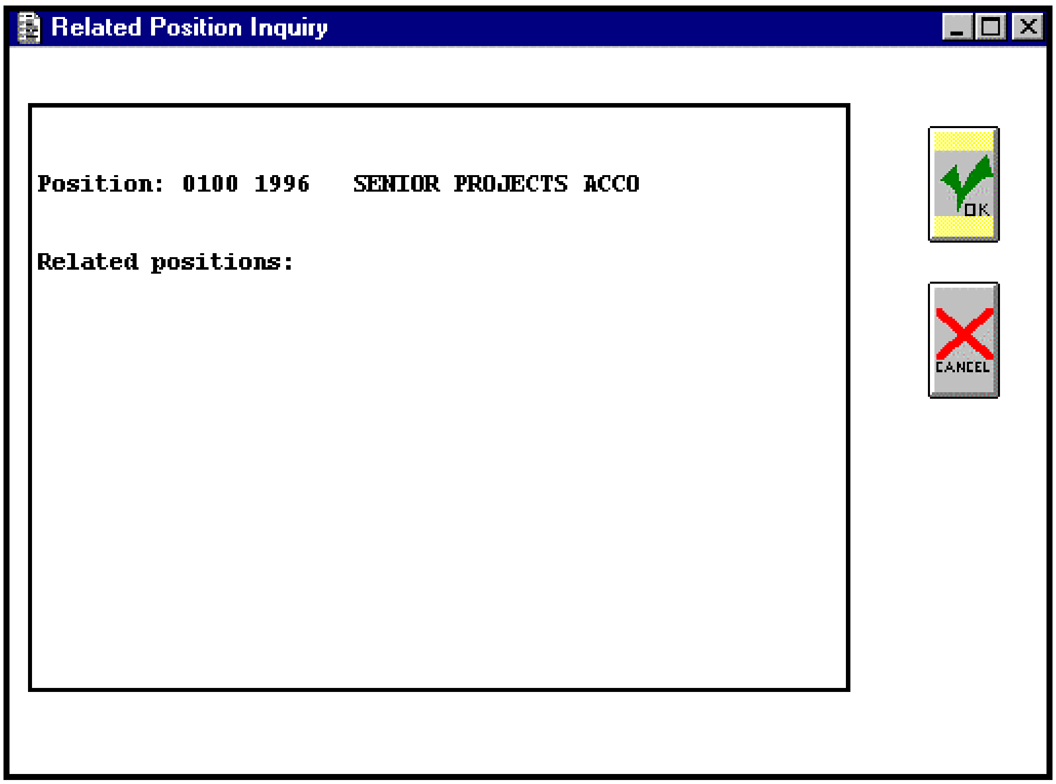


This screen lists any position numbers being used to "fill-in" for a position which is not occupied for a certain time.  This would normally happen when a position is not filled due to a leave of some sort, and a temporary position(s) is created to be used to fill-in.

(For more detailed information about the fields in this screen, see *Appendix B.12.4: Fill-in Position Inquiry Fields*).

## 16.5A(II)  "Related Position" Button

Clicking on the "Related" button accesses the "Related Position Inquiry" Screen:

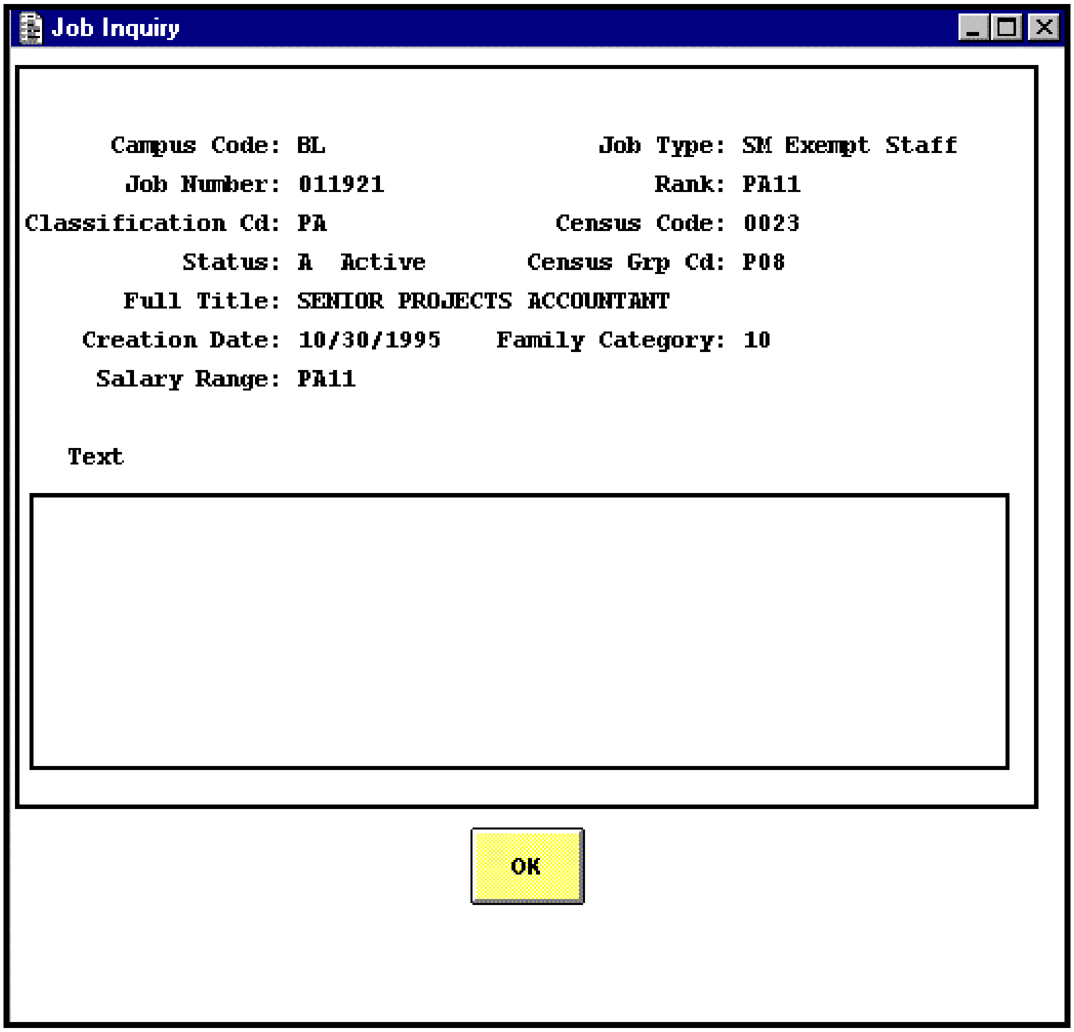



This screen documents any position number(s) associated with a given position.  This situation would normally occur if there were positions shared by multiple departments, and each department wanted to record their portion of the position in their reports and statistics.

(For more detailed information about the fields in this screen, see *Appendix B.12.5: Related Position Inquiry Fields*).

## 16.5B “More” Button # 2

The second “More” button accesses the “Job Inquiry” screen, which details and summarizes all the attributes associated with a particular job.




NOTE: The “Job Inquiry” screen can also be accessed directly by clicking on the “Job Inquiry” Button from the Labor Distribution Report Menu. See *Section 15.1: Job Inquiry* for more information.

(For more detailed information about the fields on this screen, see *Appendix B.11: Job Inquiry Fields*).

# APPENDIX A: LABOR DISTRIBUTION INQUIRIES SHORT CUTS

Labor Distribution Inquiries are set up to provide information about the following sets of data:

1. Payroll expenses by person
2. Payroll encumbrances by person
3. Position information, including:
   - basic position attributes
   - history of Position Changes
   - history of who has occupied a position
4. Calculated Salary Foundation information by person

The following is a shorthand guide on how to obtain the most commonly requested information accessible through the Labor Distribution Inquiries system.

## A.1 How to find payroll expense variances by account

- from the menu bar, click on "Inquiries" option
- click on "Labor Distribution" option
- click on "Account Status (Current Funds)" button
- enter required search criteria
- click on "Report" button (provides data about actual individuals)

Or

- from menu bar, click on "Inquiries" option
- click on "Balances" option
- click on "Available Balances" button
- enter search criteria and click on "Report" button
- with the cursor resting on a line in the "Actual" column, click on "Labor Balances"

## A.2 How to find current payroll expense information by person

- from the menu bar, click on "Inquiries" option
- click on "Labor Distribution" option
- click on "Funding By Person" button
- enter search criteria and click on "Report" button

Or

- from the menu bar, click on "Inquiries" option
- click on "Labor Distribution" option
- click on "Labor Ledger View" button
- enter search criteria (provides view which matches general ledger in terms of when transactions hit accounting system)

Or

- from the menu bar, click on "Inquiries" option
- click on "Labor Distribution" option
- click on "Labor Ledger A-21 View" button
- enter search criteria (provides view of expenses according to payroll period)

## A.3 How to find information about a position

- from the menu bar, click on "Inquiries" option
- click on "Labor Distribution" option
- click on the "Position Inquiry" button
- enter search criteria
- with cursor resting on a position number, click on the "More" button

## A. 4 How to find the history of who has occupied a position

- from the menu bar, click on "Inquiries" option
- click on "Labor Distribution" option
- click on the "Position Inquiry" button
- enter search criteria
- with cursor resting on a position number, click on the "More" button
- Click on the "Funding" button

## A.5 How to find position history information

- from the menu bar, click on "Inquiries" option
- click on "Labor Distribution" option
- click on the "Position Inquiry" button
- enter search criteria
- with cursor resting on a position number, click on the "More" button
- Click on the "Pos History" button

## A.6 How to trace the history of documents affecting position

- from the menu bar, click on "Inquiries" option
- click on "Labor Distribution" option
- click on the "Position Inquiry" button
- enter search criteria
- with cursor resting on a position number, click on the "More" button
- click on the "Doc History" button
- double-click on a document number to see the document which modified the position

## A.7 How to find CSF Tracker information by account

- from the menu bar, click on “Inquiries” option
- click on “Labor Distribution” option
- click on the “CSF Tracker” button
- enter search criteria

Or

- from the menu bar, click on “Inquiries” option
- click on “Labor Distribution” option
- click on the “Account Status (Base Funds)” button
- enter search criteria (the results are summarized by labor object code)
- double-click on a CSF amount line to see detail for that labor object code

## A.8 How to find CSF Tracker information by person

- from the menu bar, click on “Inquiries” option
- click on “Labor Distribution” option
- click on the “Funding by Person” button
- enter search criteria

## A.9 How to find base/CSF Tracker variances by account

- from the menu bar, click on “Inquiries” option
- click on “Labor Distribution” option
- click on the “Account Status (Base Funds)” button
- enter search criteria

## A.10 How to view CSF Tracker history (list of all changes) by person

- from the menu bar, click on “Inquiries” option
- click on “Labor Distribution” option
- click on the “Funding by Person” button
- enter search criteria

## A.11 How to view CSF Tracker history (list of all changes) by account

- from the menu bar, click on “Inquiries” option
- click on “Labor Distribution” option
- click on the “CSF Tracker” button
- enter search criteria

# APPENDIX B: LABOR DISTRIBUTION INQUIRY FIELDS

## B.1 CSF Tracker Inquiry Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Fiscal Year** | **Fiscal Year**<br>This is the fiscal period for the report. | System retrieved. **Display only**. |
| **Chart** | **Chart**<br>This field shows the valid code from the Chart of Accounts. | System retrieved. **Display only**. |
| **Account** | **Account Number**<br>This is the account number for the report. | System retrieved. **Display only**. |
| **Sub** | **Sub Account**<br>This is the sub account code for the report. | System retrieved. **Display only**. |
| **Date** | **Date**<br>This is the date on which the CSF Tracker record was created. | System retrieved. **Display only**. |
| **Person** | **Person**<br>This is the name of the employee who currently or previously occupied this position on this account in this fiscal year. “VACANT” indicates that no employee was appointed in this position as of the date the record was created. | System retrieved. **Display only**. |
| **Objt** | **Object Code**<br>This is the object code for the account from which the current person in this position is compensated. | System retrieved. **Display only**. |
| **Sub Obj** | **Sub Object Code**<br>This is the sub object code for the account from which the current person in this position is compensated. | System retrieved. **Display only**. |
| **Pos #** | **Position Number**<br>This is a number that identifies the employee’s position or positions for this account for this fiscal year. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **CSF Amount** | **CSF Amount** This is the amount budgeted for this person in this position on this account for the fiscal year. | System retrieved. **Display only**. |
| **St** | **Status** This field identifies the current status of the position. Options are: (V) = Currently marked as a vacant position. (L) = Marked as a position in which the incumbent is on leave. (blank) = Normal, current, active CSF record. | System retrieved. **Display only**. |
| **Dl** | **Delete** This field denotes whether the record is active or not. Options are: (blank) = Active CSF line. (R) = An update was done to the EDB, updating the appointment in place. (D) = A PAF was processed to supersede the previous PAF. (T) = Record is inactive because object code was changed. (P) = Position was dropped from Tracker due to reclassification or departmental action. (Q) = Record is inactive because PAF was marked as temporary action retroactively. (X) = Record is inactive. | System retrieved. **Display only**. |
| **CSF FTE** | **CSF FTE** This is the FTE of the position for this account. | System retrieved. **Display only**. |
| **Ov** | **Override** This is the Override code. The CSF Tracker is normally calculated as PAFs are processed. If there are problems with the program, an override entry can be entered which will override the calculation. Any of those entries will be coded as (O). All other entries are coded as (N). | System retrieved. **Display only**. |

## B.2 Account Status (Base Funds) Fields

| Field Name | Title & Description | Other information |
|---|---|---|

| | | |
|---|---|---|
| **Fiscal Year** | **Fiscal Year**<br>This is the fiscal period for the report. | System retrieved. **Display only**. |
| **Chart** | **Chart**<br>This field provides the valid code from the Chart of Accounts. | System retrieved. **Display only**. |
| **Account** | **Account Number**<br>This is the account number for the report. | System retrieved**. Display only**. |
| **SubAcct** | **Sub Account**<br>This is the sub account code for the report. | System retrieved**. Display only**. |
| **Objt** | **Object Code**<br>This is the object code for the account from which the current person in this position is compensated. | System retrieved. **Display only**. |
| **Sobj** | **Sub Object Code**<br>This is the sub object code for the account from which the current person in this position is compensated. | System retrieved. **Display only**. |
| **Adjust Base Bdgt** | **Adjusted Base Budget**<br>The is the base budget for this account/ object/sub object code and includes any adjustments that have been made since the beginning of the year. | System retrieved. **Display only**. |
| **CSF Acct Amount** | **CSF Account Amount**<br>This is the total of all the CSF amounts for each position on the account. | System retrieved. **Display only**. |
| **Base/CSF Variance** | **Base/CSF Variance**<br>This is the adjusted base minus the CSF amount. | System retrieved. **Display only**. |

## B.3 Account Status (Current Year Funds) Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Fiscal Year** | **Fiscal Year**<br>This is the fiscal period for the report. | System retrieved. **Display only**. |
| **Chart** | **Chart**<br>This field provides the valid code from the Chart of Accounts. | System retrieved. **Display only**. |
| **Account** | **Account Number**<br>This is the account number for the report. | System retrieved. **Display only**. |
| **Object** | **Object Code**<br>This is the object code for the account from which the current person in this position is compensated. | System retrieved. **Display only**. |
| **Sub Acct** | **Sub Account**<br>This is the sub account code for the report. | System retrieved. **Display only**. |
| **Sub Obj** | **Sub Object Code**<br>This is the sub object code for the account from which the current person in this position is compensated. | System retrieved. **Display only**. |
| **Person** | **Person**<br>This is the name of the employee who occupies/has occupied this position on this account in the current fiscal year. | System retrieved. **Display only**. |
| **Position** | **Position Number**<br>This is a number that identifies the position to which one or more persons may be assigned. | System retrieved. **Display only**. |
| **YTD Actual** | **YTD Actual Amount**<br>This is the total amount to date paid to this person for this position and account in the current fiscal year. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Outstanding Encum** | **Outstanding Encumbrance**<br>This is the amount projected to be spent for this person for this position and account for the rest of the current fiscal year. | System retrieved. **Display only**. |

## B.4 Labor Ledger Balance Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **FY** | **Fiscal Year**<br>This is the fiscal year for the report. | System retrieved. **Display only**. |
| **Acct** | **Account Number**<br>This is the account number from which the person in this position is compensated. | System retrieved. **Display only**. |
| **Objt** | **Object Code**<br>This is the object code for the account from which the person in this position is compensated. | System retrieved. **Display only**. |
| **Bal Type** | **Balance Type**<br>This is a code which distinguishes one type of balance from another. Options are: (AC) = Actual Balance; (IE) = Intended Encumbrances. | System retrieved. **Display only**. |
| **Pos #** | **Position Number**<br>This is a number that identifies the position or positions to which this person is assigned. | System retrieved. **Display only**. |
| **Ch** | **Chart**<br>This field provides the valid code from the Chart of Accounts. | System retrieved. **Display only**. |
| **SubAcct** | **Sub Account**<br>This is the sub account code for which the person in this position is compensated. | System retrieved. **Display only**. |
| **Sub Obj** | **Sub Object Code**<br>This is the sub object code for the account from which the person in this position is compensated. | System retrieved. **Display only**. |
| **Name** | **Name**<br>This is the name of the person who currently occupies this position. | System retrieved. **Display only**. |
| **Annual** | **Annual**<br>This is the total of all months listed in the Labor Ledger Balance fields. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Begin** | **Begin**<br>This field is not currently in operation. | |
| **C&G** | **Contract and Grant**<br>This field reflects the rolling total of all expenses since any Contract and Grant account (for which the individual has performed any activity) began. | System retrieved. **Display only**. |
| **Yr End Close** | **Year End Close**<br>This field reflects the total of any adjustments made during year end closing. | System retrieved. **Display only**. |

## B.5 Labor Ledger Entry Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **FY** | **Fiscal Year**<br>This is the fiscal year for the report. | System retrieved. **Display only**. |
| **Prd** | **Pay Period**<br>This is the pay period for which compensation was received. | System retrieved. **Display only**. |
| **Chart** | **Chart**<br>This field provides the valid code from the Chart of Accounts. | System retrieved. **Display only**. |
| **Account** | **Account Number**<br>This is the account number from which the person in this position is compensated. | System retrieved. **Display only**. |
| **Sub** | **Sub Account Code**<br>This is the sub account code from which the person in this position is compensated. | System retrieved. **Display only**. |
| **Object** | **Object Code**<br>This is the object code for the account from which the person in this position is compensated. | System retrieved. **Display only**. |
| **Sub Obj** | **Sub Object Code**<br>This is the sub object code for the account from which the person in this position is compensated. | System retrieved. **Display only**. |
| **Person** | **Person**<br>This is the name of the person who currently occupies this position. | System retrieved. **Display only**. |
| **Pos #** | **Position Number**<br>This is a number identifying the position or positions to which this person is assigned. | System retrieved. **Display only**. |
| **Leg #** | **Legacy Number**<br>This is the former position number. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Type** | **Type**<br>This indicates the payroll earnings type. To look up specific types, select the menu bar option and click on “Inquiries.” Select “Reference Tables” and then select “LD-Payroll Earnings Type.” | System retrieved. **Display only**. |
| **Hours** | **Hours**<br>This is the number of hours which are being compensated. | System retrieved. **Display only**. |
| **Amount** | **Amount**<br>This is the dollar amount of the compensation. | System retrieved. **Display only**. |
| **Period End Dt** | **Period End Date**<br>This is the ending date of the payroll period. | System retrieved. **Display only**. |
| **Description** | **Description**<br>This expandable field indicates from which payroll this person was compensated. | System retrieved. **Display only**. |
| **Project** | **Project Number**<br>This is an optional number to which this compensation was assigned. | System retrieved. **Display only**. |
| **Org Ref** | **Organization Reference Number**<br>This is an optional reference number entered by the organization to reference this compensation. | System retrieved. **Display only**. |
| **Dept Doc #** | **Department Doc #**<br>This is an optional number entered by the department to identify this compensation. | System retrieved. **Display only**. |
| **D Type** | **Document Type**<br>This is the type of transaction which initiated this compensation. To look up specific types, select the menu bar option and click on “Inquiries.” Select “Reference Tables” and then select “Document Type.” | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **O Type** | **Object Type**<br>This shows what kind of income/expense or asset/liability this compensation represents. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Object Type." | System retrieved. **Display only**. |
| **Document #** | **Document Number**<br>This is the number of the payroll from which this compensation was paid. | System retrieved. **Display only**. |
| **B Type** | **Balance Type**<br>This is a code which distinguishes one type of balance from another. Options are: (AC) = Actual Balance; (IE) = Intended Encumbrances. | System retrieved. **Display only**. |

## B.6 Funding By Person Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Fiscal Year** | **Fiscal Year**<br>This is the fiscal period for the report. | System retrieved. **Display only**. |
| **Universal Id** | **Universal Id**<br>This unique code, established by computing services, identifies this person within the Financial Information System. | System retrieved. **Display only**. |
| **Name** | **Funded Person Name**<br>This is the name of the employee who currently or previously occupied this position on this account in this fiscal year. | System retrieved. **Display only**. |
| **Chart** | **Chart**<br>This field is the valid code from the Chart of Accounts. | System retrieved. **Display only**. |
| **Account** | **Account Number**<br>The account number(s) from which the person in this position is funded. | System retrieved. **Display only**. |
| **Sacct** | **Sub Account**<br>This is the sub account code for this report. | System retrieved. **Display only**. |
| **Objt** | **Object Code**<br>The object code(s) for the account from which the current person in this position is compensated. | System retrieved. **Display only**. |
| **Sobj** | **Sub Object Code**<br>This is the sub object code for the account from which the current person in this position is compensated. | System retrieved. **Display only**. |
| **Pos #** | **Position Number**<br>This is a number that identifies the employee's position for this account for this fiscal year. | System retrieved. **Display only**. |
| **Leg #** | **Legacy Number**<br>This is the former position number. | System retrieved. **Display only**. |

| **Field Name** | **Title & Description** | **Other information** |
|---|---|---|
| | | |
| **Amount** | **CSF Amount**<br>This is the amount budgeted for the person in this position on this account for the fiscal year. | System retrieved. **Display only**. |
| **FTE** | **CSF FTE**<br>This is the FTE of the position for this account. | System retrieved. **Display only**. |
| **St** | **Status**<br>This field identifies the current status of the position. For options, see *Appendix B.1: CSF Tracker Inquiry Fields*. | System retrieved. **Display only**. |
| **Dl** | **Delete**<br>This field denotes whether the record is active or not. For options, see *Appendix B.1: CSF Tracker Inquiry Fields*. | System retrieved. **Display only**. |
| **PAF** | **PAF**<br>This is the form which establishes the employee's conditions of employment and salary. | System retrieved. **Display only**. |
| **Current** | **Current Amount**<br>This is the current amount paid to the person in this position and account. | System retrieved. **Display only**. |
| **Encum** | **Outstanding Encumbrance**<br>This is the amount projected to be spent on the person in this position and account for the rest of the fiscal year. | System retrieved. **Display only**. |
| **Total** | **Total Amount**<br>This is the total amount paid to the person in this position and account. | System retrieved. **Display only**. |

## B.7 Position Listing By Organization Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Pos #** | **Position Number**<br>This is a unique identifier for the position, assigned by the system. | Six characters. System retrieved. **Display only**. |
| **Title** | **Position Title**<br>This is the title of the position as established by Human Resources/Dean of Faculties. | System retrieved. **Display only**. |
| **Job Rank** | **Job Rank Code**<br>This is the rank associated with the job. Note: the job rank codes are not the same as the appointment rank codes. | Four characters. System retrieved. **Display only**. |
| **St** | **Position Status Code**<br>This code defines the status of the position. Options include (A) = Active, (I) = Inactive, (D) = Deleted. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Status Codes." | One character. System retrieved. **Display only**. |
| **Pay Dates** | **Position Pay Dates**<br>This is the number of months over which the position is contracted to be paid. For example, ten or twelve months. | Four alphanumeric characters. System retrieved. **Display only**. |
| **Effective Date** | **Position Effective Date**<br>This is the date on which this position was established. Note: No positions will have an effective date earlier than 07/01/94 due to the initial creation of the positions. | Date format is MM/DD/YY. System retrieved. **Display only**. |
| **FTE** | **Position FTE (Full Time Equivalent)**<br>This is the annualized Full Time Equivalent of the position when fully filled. This is set by the organization establishing the position. | Three characters separated by a decimal point. System retrieved. **Display only**. |

## B.8 A21 Update Document Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Account** | **Account**<br>This is the account number that identifies where an individual's activity is performed. | System retrieved. **Display only**. |
| **Src Acct** | **Source Account**<br>This is the account number from which the individual is reimbursed for the activity. | System retrieved. **Display only**. |
| **Direct Cost Act** | **Direct Cost Activities**<br>These are a series of categories, which are directly related to research, that identify the type of activity that is performed by the individual. | System retrieved. **Display only**. |
| **Indirect Cost Activities** | **Indirect Cost Activities**<br>These are a series of categories, which are indirectly related to research, that identify the type of activity that is performed by the individual. | System retrieved. **Display only**. |
| **Tot Pct** | **Total Percent**<br>This is the total amount of activity performed by the individual for all identified accounts. | System retrieved. **Display only**. |

## B.9 Area Coordinators By Organization Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **COA** | **Chart of Accounts**<br>This field provides the valid code from the Chart of Accounts. | System retrieved. **Display only**. |
| **Org** | **Organization**<br>This is the name of the organization to which the area coordinator belongs. | System retrieved. **Display only**. |
| **Name** | **Name**<br>This is the name of the area coordinator. | System retrieved. **Display only**. |
| **Frm** | **Form Type Requested**<br>This is a Y or N flag that indicates whether the area coordinator prefers to receive an electronic or paper form (Y= electronic form; N = paper form). | System retrieved. **Display only**. |
| **Address** | **Address**<br>This is the campus address where the area coordinator is located. | System retrieved. **Display only**. |
| **Cmps** | **Campus**<br>This is the physical campus where the area coordinator is located. | System retrieved. **Display only**. |
| **Phone** | **Phone**<br>This is the campus phone number where the area coordinator can be reached. | System retrieved. **Display only**. |
| **Email Id** | **Email ID**<br>This field shows the area coordinator's email address. | System retrieved. **Display only**. |

## B.10 Cost Sharing Arrangements By Organization Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Fiscal Year** | **Fiscal Year**<br>This is the fiscal period for the report. | System retrieved. **Display only**. |
| **COA/Account** | **Chart of Account/Account**<br>This is the valid chart of account code and the payroll account number from which the employee is paid. | System retrieved. **Display only**. |
| **SSN** | **Social Security Number**<br>This is the social security number of the employee. | System retrieved. **Display only**. |
| **Employee Name** | **Employee Name**<br>This is the name of the employee. | System retrieved. **Display only**. |
| **Rpt Typ** | **Report Type**<br>The report type corresponds to how an individual is classified for payroll purposes.<br>10 = ten pay reporting<br>12 = twelve pay reporting<br>BI = biweekly reporting<br>SU = summer reporting | System retrieved. **Display only**. |
| **C&G COA** | **Contract and Grant Chart of Accounts**<br>This field provides the valid chart of accounts code for the grant account for which the activity is performed. | System retrieved. **Display only**. |
| **C&G Account** | **Contract and Grant Account**<br>This is the grant account for which the actual activity is performed. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **% Columns** | **Percentage of Activity Performed** These numbered columns indicate the percentage of activity spent on the identified account, by period. NOTE: The number of periods vary according to how the employee's position is classified. Four periods indicate that an individual is a biweekly employee. Three periods indicate that an individual is an academic appointee (i.e. two semesters and summer). Two periods indicate that an individual is a monthly employee. | System retrieved. **Display only**. |
| **Pro Rate** | **Pro Rated Activity** These numbered columns indicate any discrepancy between the dates of activity and the report period dates. A discrepancy might arise if an employee begins activity on grant late, and the activity cuts across reported periods. As with the "%" columns, the number of periods reflect how the employee's position is classified. Four periods indicate that an individual is a biweekly employee. Three periods indicate that an individual is an academic appointee (i.e. two semesters and summer). Two periods indicate that an individual is a monthly employee. | System retrieved. **Display only**. |

## B.11 Job Inquiry Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Campus Code** | **Physical Campus Code**<br>This code indicates the physical campus associated with each job number. | System retrieved. **Display only**. |
| **Job Number** | **Job Number**<br>This is a unique identifier for the job assigned by the system. The job number identifies a job within a physical campus. | System retrieved. **Display only**. |
| **Classification Cd** | **Classification Code**<br>This is a code which is used to sub-classify jobs into groups. It is roughly equivalent to the first two characters of the rank code. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Classification Codes." | System retrieved. **Display only**. |
| **Status** | **Job Status Code**<br>This code defines the status of the job. Options include: (A) = Active, (I) = Inactive, (D) = Deleted. | System retrieved. **Display only**. |
| **Full Title** | **Full Job Title**<br>This is the full title of the job as established by Human Resources/Dean of Faculties. | System retrieved. **Display only**. |
| **Creation Date** | **Creation Date**<br>This is the date that the position was created or classified. | System retrieved. **Display only**. |
| **Salary Range** | **Salary Range**<br>The salary range is associated with the job rank. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Salary Ranges." | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Job Type** | **Job Type**<br>This is a code describing the job type. For example, AC = Academic; SM = Exempt Staff; HR = Hourly Staff. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Type Codes." | System retrieved. **Display only**. |
| **Rank** | **Job Rank Code**<br>This is the rank associated with a job (which is not the same as the appointment rank code). To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Rank Codes." | System retrieved. **Display only**. |
| **Census Code** | **Job Census Code**<br>This is the code used by the US Census Bureau to group jobs into categories representing different jobs in the workforce. It is maintained by the Affirmative Action Office. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Census Codes." | System retrieved. **Display only**. |
| **Census Grp Cd** | **Job Census Group Code**<br>This code is based on the codes established by the census bureau and will be maintained by the Affirmative Action office. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Census Rank Codes." | System retrieved. **Display only**. |
| **Family Category** | **Job Family Category Code**<br>This is a code maintained by Human Resources/Dean of Faculties to group jobs into families. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Family Category Codes." | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Text** | **Position Text**<br>This is a description of the position as established by the department (as reviewed and approved by HR/Dean of Faculties.) | System retrieved. **Display only**. |

## B.12 Position Inquiry Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Fiscal Year** | **Fiscal Year**<br>Positions are defined by fiscal year. Default is the current year. | System retrieved. **Display only**. |
| **Ledger #** | **Ledger Number**<br>This is the old position number from the old job classification system. | System retrieved. **Display only**. |
| **Position Number** | **Position Number**<br>This is a unique identifier for the position, assigned by the system. | System retrieved. **Display only**. |
| **Resp COA** | **Responsible Chart of Accounts**<br>This is the chart of accounts corresponding to the responsible organization. | System retrieved. **Display only**. |
| **Org** | **Organization**<br>This is the organization to which this position is assigned. | System retrieved. **Display only**. |
| **Title** | **Position Title**<br>This is the title of the position as established by Human Resources/Dean of Faculties. | System retrieved. **Display only**. |
| **Status** | **Position Status Code**<br>This code defines the status of the position. Options include (A) = Active, (I) = Inactive, (D) = Deleted, etc. | System retrieved. **Display only**. |
| **Effective Date** | **Position Effective Date**<br>This is the date on which this position was established. Note: No positions will have an effective date earlier than 07/01/94 due to the initial creation of the positions. | System retrieved. **Display only**. |
| **Position Type** | **Position Type Code**<br>This is a code which defines the type of the position. Options include: (AC) = Academic, (SM) = Staff Monthly, etc. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Supervisory** | **Position Supervisory Code**<br>This code indicates whether this position has any supervisory responsibilities. | System retrieved. **Display only**. |
| **Sabbatical Elig** | **Position Sabbatical Eligibility Code**<br>This is a code used to indicate whether a given position is eligible for sabbaticals. It is maintained by HR/Dean of Faculties. | System retrieved. **Display only**. |
| **Sprvsry Lvl** | **Position Supervisory Level**<br>This code indicates the level of supervision required in this position. Examples include: (FN) = First Level Supervision, (MG) = Managerial Supervision, (DH) = Department Head, (NA) = Not Applicable. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Supervisory Levels." | System retrieved. **Display only**. |
| **Tenure Elig** | **Tenure Eligibility**<br><br>Examples include: (TE) = Tenure Eligible, (TT) = Tenure Track, (NA) = Not Applicable. | System retrieved. **Display only**. |
| **Budgeted?** | **Position Budgeted Code**<br>This is a Yes/No flag indicating whether this position is budgeted during budget construction. | System retrieved. **Display only**. |
| **Bargaining Unit** | **Position Bargaining Unit Code**<br>This code reflects the bargaining unit representing this position. NOTE: All positions are not represented by a bargaining unit, so there will be a value "NA" which stands for no representation. | System retrieved. **Display only**. |
| **Research Tech?** | **Position Research/Technical Code**<br>A Yes/No flag to indicate whether this position can be used as a direct cost on contracts and grants. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **FTE** | **Position FTE (Full Time Equivalent)**<br>This is the annualized Full Time Equivalent of the position when fully filled.  This is set by the organization establishing the position. | System retrieved.  **Display only**. |
| **Pay Dates** | **Position Pay Dates**<br>This is the number of months over which the position is contracted to be paid.  For example, ten or twelve months. | System retrieved.  **Display only**. |
| **% Time** | **Position Percent Time**<br>The normal percent time per pay period associated with this position.  This field is calculated in conjunction with the Position FTE and the Position Budget information. | System retrieved.  **Display only**. |
| **Org Pos Type** | **Organization Position Type Code**<br>A code indicating the position type established by the organization for that organization's reporting purposes. | System retrieved.  **Display only**. |
| **Org Min Salary** | **Organizational Minimum Salary Amount**<br>This is the minimum amount established for the position by the department within the constraints of any job minimum salary. | System retrieved.  **Display only**. |
| **Org Max Salary** | **Organizational Maximum Salary Amount**<br>This is the maximum amount established for the position by the department within the constraints of any job maximum salary. | System retrieved.  **Display only**. |
| **Text** | **Position Text**<br>This is a description of the position as established by the department (as reviewed and approved by HR/Dean of Faculties.) | System retrieved.  **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Cmp/Job Nbr** | **Campus Code/ Job Number**<br>The campus code associated with the job number. The Job Number assigned to this position. | System retrieved. **Display only**. |
| **Title** | **Position Title**<br>The title of the position as established by HR/Dean of Faculties. | System retrieved. **Display only**. |
| **Status** | **Position Status Code**<br>Defines the status of the position. Some options are (A) = Active, (I) = Inactive, (D) = Deleted. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Status Codes." | System retrieved. **Display only**. |
| **Rank** | **Job Rank Code**<br>This is the rank associated with the job. NOTE: the job rank codes are not the same as the appointment rank codes. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Rank Codes." | System retrieved. **Display only**. |
| **Job Type** | **Job Type Code**<br>This code is an attribute of the job classification. It represents a more general category of jobs than the job classification code. Examples include: (AC) = Academic, (SM) = Exempt Staff, (SB) = Non-Exempt Staff, (HR) = Hourly Staff, (HS) = Hourly Student. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Type Codes." | System retrieved. **Display only**. |
| **Min Salary** | **Job Minimum Salary Amount**<br>This is an attribute of the job salary range. This minimum amount for the range is set by the HR/Dean of Faculties. The salary range changes each fiscal year. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Max Salary** | **Job Maximum Salary Amount**<br>This is an attribute of the job salary range. The maximum amount for the range is set by the HR/Dean of Faculties. The salary range changes each fiscal year. | System retrieved. **Display only**. |
| **Census Code** | **Job Census Code**<br>This code is the code used by the US Census Bureau to group jobs into categories representing different jobs in the workforce. It is maintained by the Affirmative Action office. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Census Codes." | System retrieved. **Display only**. |
| **Job Group** | **Job Census Group Code**<br>This code is based on the codes established by the census bureau and is maintained by the Affirmative Action office. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Job Census Group Codes." | System retrieved. **Display only**. |

### B.12.1 Document History Inquiry Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **FY** | **Fiscal Year**<br>This is the fiscal year of the document which changed the position. | System retrieved. **Display only**. |
| **Doc Number** | **Document Number**<br>This is the identifying number of the document which changed the position. | Nine characters. The last two numbers indicate the year the document was initiated. System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Description** | **Description**<br>This is a brief description of the change made to the position by this document. | System retrieved. **Display only**. |
| **Approved Dt** | **Approved Date**<br>This is the date that the original document was approved. | Date format is MM/DD/YY. System retrieved. **Display only**. |

### B.12.2 Position History Inquiry Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **FY** | **Fiscal Year**<br>This is the fiscal year of the variation of the position. | System retrieved. **Display only**. |
| **Positn Number** | **Position Number**<br>The position number is a unique identifier for the position, assigned by the system. It is keyed to the fiscal year. | System retrieved. **Display only**. |
| **Effective Date** | **Position Action Effective Date**<br>This represents the date on which the Position Action became effective. | System retrieved. **Display only**. |
| **Effective End Date** | **Position Action Effective End Date**<br>This is a system-maintained attribute of the Position History Table. It represents the date when the subsequent action became effective | System retrieved. **Display only**. |
| **Act 1, Act 2, Act 3** | **Position Action Codes**<br>There may be up to three actions for any change or creation of a position. Examples of actions are: (RC) = Reclassification; (PD) = Position Delete; (NP) = New Position Creation. To look up specific types, select the menu bar option and click on "Inquiries." Select "Reference Tables" and then select "Pos-Action Codes." | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Responsbl COA** | **Responsible Chart of Accounts**<br>This is the chart of accounts to which the position is assigned. | System retrieved. **Display only**. |
| **(Resp) Org** | **Responsible Organization**<br>This is the organization to which the position is assigned. The organization defines the "home" of the position; it must approve any changes to the position. | System retrieved. **Display only**. |
| **Title** | **Position Title**<br>This is the title of the position as established by Human Resources/Dean of Faculties. | System retrieved. **Display only**. |

### B.12.3 Position Funding Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **FY** | **Fiscal Year**<br>This is the current fiscal year. | System retrieved. **Display only**. |
| **Position Number** | **Position Number**<br>The position number is a unique identifier for the position, assigned by the system. It is keyed to the fiscal year. | System retrieved. **Display only**. |
| **RespCOA** | **Responsible Chart of Accounts**<br>This is the chart of accounts to which the position is assigned. | System retrieved. **Display only**. |
| **(Resp) Org** | **Responsible Organization**<br>This is the organization to which the position is assigned. The organization defines the "home" of the position; it must approve any changes to the position. | System retrieved. **Display only**. |
| **Title** | **Position Title**<br>This is the title of the position as established by Human Resources/Dean of Faculties. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **COA** | **Chart of Accounts**<br>This field is the valid code from the Chart of Accounts. | System retrieved. **Display only**. |
| **Account** | **Account Number**<br>This is the account number from which the position is compensated. | System retrieved. **Display only**. |
| **Sub Acct** | **Sub Account**<br>This is the sub account code associated with the position. | System retrieved. **Display only**. |
| **Obj** | **Object Code**<br>This is the object code for the account from which the current position is compensated. | System retrieved. **Display only**. |
| **SubObj** | **Sub Object Code**<br>This is the sub object code for the account from which the current position is compensated. | System retrieved. **Display only**. |
| **Person** | **Person**<br>This is the name of the employee who has occupied this position on this account. | System retrieved. **Display only**. |
| **Amount** | **Amount**<br>This is the amount budgeted for this position on this account for the fiscal period. | System retrieved. **Display only**. |

## B.12.4 Fill-In Position Inquiry Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Position** | **Position Fiscal Year/ Position Number**<br>All positions are defined by fiscal year. The position number is a unique identifier for the position, assigned by the system. It is keyed to the fiscal year. | System retrieved. **Display only**. |

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Fill-in positions** | **Fill-in Positions**<br>These are the position numbers being used to "fill-in" for a position which is not occupied for a certain time. This would normally happen when a position is not filled due to a leave of some sort, and a temporary position(s) is created to be used to fill-in. | System retrieved. **Display only**. |

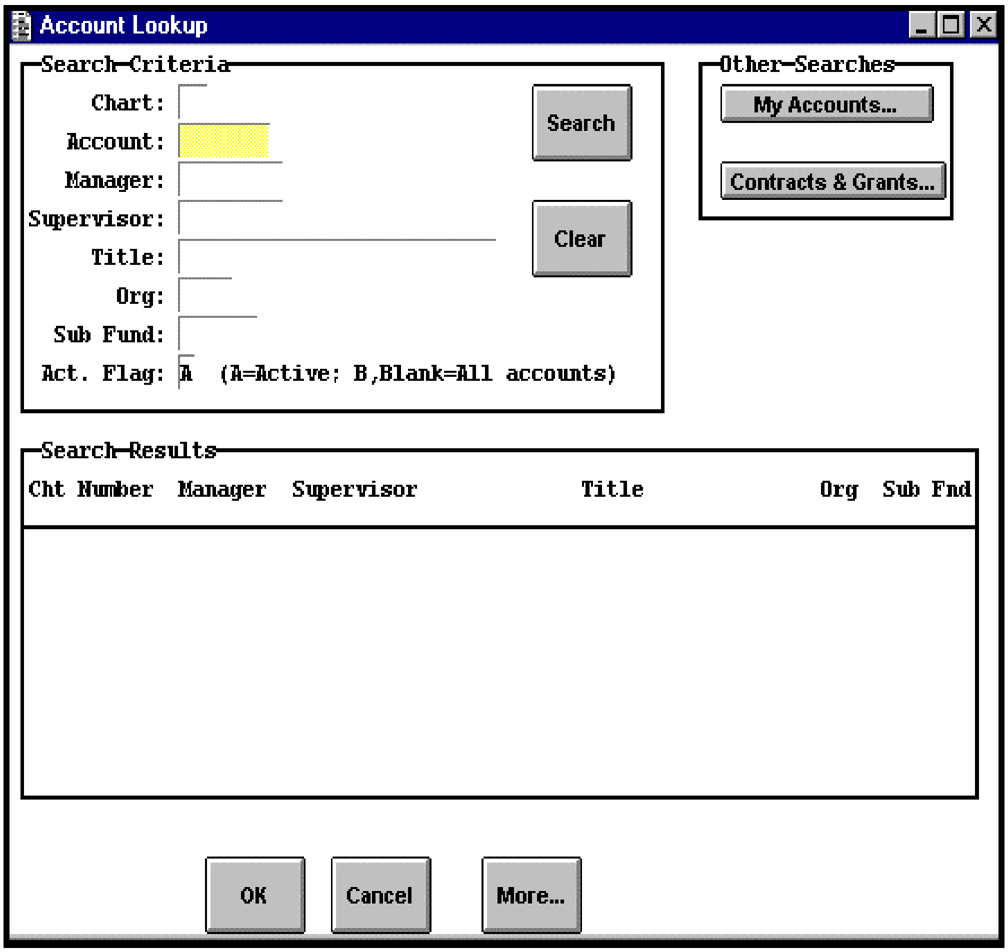
### B.12.5 Related Position Inquiry Screen Fields

| Field Name | Title & Description | Other information |
|---|---|---|
| | | |
| **Position** | **Position Fiscal Year/ Position Number**<br>All positions are defined by fiscal year. The position number is a unique identifier for the position, assigned by the system. It is keyed to the fiscal year. | System retrieved. **Display only**. |
| **Related Positions** | **Related Positions**<br>This field contains the position number(s) associated with a given position. This situation would normally occur if there were positions shared by multiple departments, and each department wanted to record their portion of the position in their reports and statistics. | System retrieved. **Display only**. |

# APPENDIX C: PERFORMING SEARCHES

## C.1 Performing an Account Search

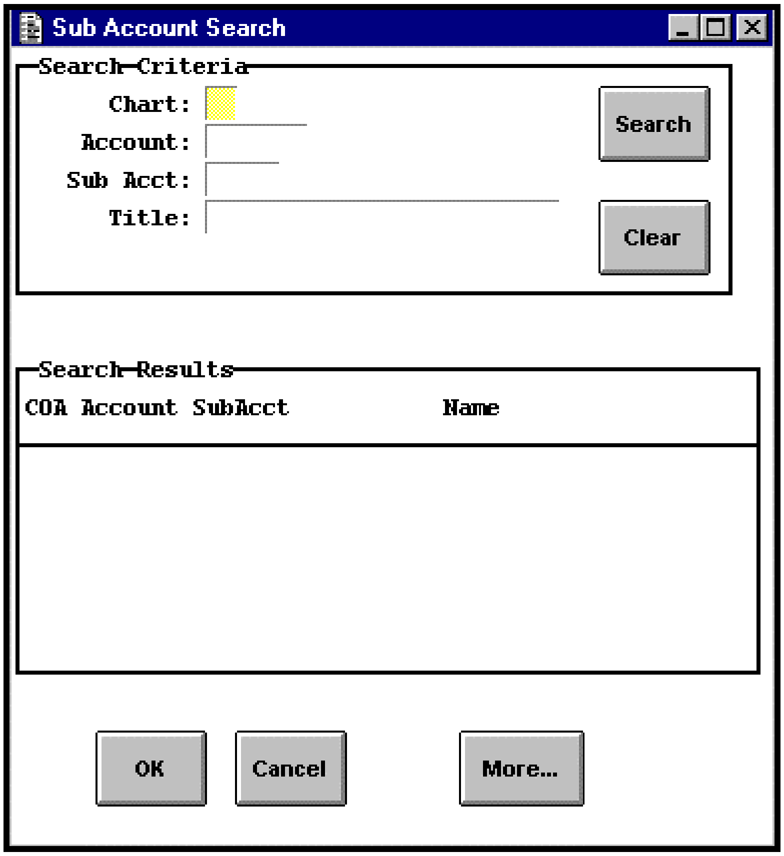
If you do not know the correct account number for the account you wish to access, you may perform a search by double-clicking on the blank "Account" field in the search criteria window.




In order to perform a successful search, you need to enter as much information as you can in the blank fields of the "Lookup" screen. The more information you can enter, the quicker and more focused the search will be.

## C.2 Performing a Sub-Account Search

If you do not know the correct sub-account for the account you wish to access, you may perform a search by double-clicking on the blank "Sub-Account" field in the search criteria window.




In order to perform a successful search, you need to enter as much information as you can in the blank fields of the "Search" screen. The more information you can enter, the quicker and more focused the search will be.

## C.3 Object Code Lookup screen

If you do not know the object code for the account you are trying to access, you may perform a search by double-clicking on the object field in the search criteria window. A lookup list of object codes will appear. You may then perform a variety of searches to find the appropriate object code you need. Double-clicking on a line or clicking on "OK" with the cursor resting on a line of information will return that object code to the criteria window.