

6.14(e)- How to Run CAT Reports – CAT Position Report

Purpose and Overview

The Position Report displays key information on all positions (CAT Records) and Vacant/Budget Adjustment rows (Additional Adjustments Page records) based on selected run control criteria. This is the only report that combines the by person funding and compensation data with the additional adjustment page data. Divisional budget officers can run this report and save it for their units at the beginning and end of the budget process as their official record of CAT data as it provides a more complete picture of the data than the DPS.

This report allows users of CAT to view all records that exist in the CAT and the AAP. Users will review this report to get a complete picture of their budgeted positions. They may also distribute it to other users who may not have access to the CAT/AAP, but need to see the data that it houses.

PLEASE NOTE:

Process Inputs

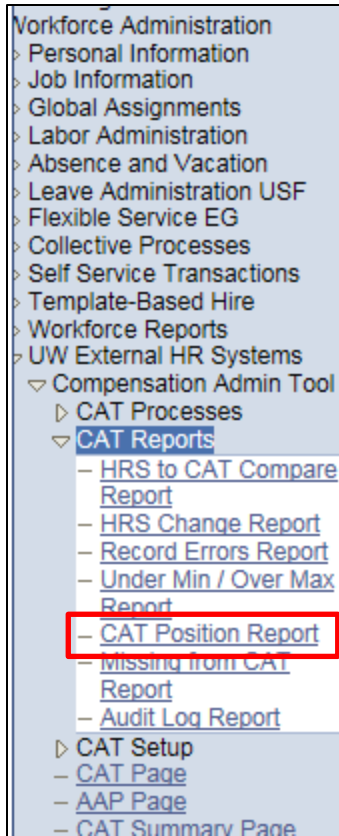
- Fiscal Year
- Business Unit
- Division
- Dept ID
- Employee Class

Process Outputs

- Excel document with a population that meet the run control criteria and have records in CAT or the AAP.

Procedure Steps

1. Navigate to **Workforce Administration > UW External HR Systems > Compensation Admin Tool > CAT Reports > CAT Position Report.**



2. Click Search under the Find an Existing Value tab to select a previously created Run Control ID or create a new Run Control ID by selecting **Add a New Value**. To create a new Run Control ID, assign a unique identifier as the Run Control ID (eg. initials_date_etc.) into the Run Control ID box and select **Add**.
3. *Note: Run Control ID sets the report parameters. Users can create one ID, and use it to process multiple reports/processes or create a new ID for each report/process.*

CAT Position Report

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

4. Enter parameters to define criteria for the CAT Position Report.
 - a. Select the upcoming **Fiscal Year** used for CAT budgeting planning purposes. This field will default to the latest fiscal year setup in the CAT.
 - b. Select a **Business Unit**.
 - c. If desired, select a **Division**.
 - d. If desired, select a **Department**.
 - i. If available, the **Department** field will become editable when the user selects a Division from the search tool or enters one manually and presses the tab button out of the field.
 - e. If desired, select a **Fund Code**.
 - f. Check the **Include Addl Adj.** checkbox to include records from the AAP in the output.
 - g. Click **Select Values** in the employee class box if you wish to exclude certain employee classes from the report. The default is for all employee classes to be included. Employee classes that are not included in the CAT will not pull onto CAT reports.
 - h. Click **Save** in the bottom left to save the parameters for the report.
 - i. Click **Run** in the top right to run the report.

Position Report

Run Control ID: POSITION_REPORT [Report Manager](#) [Process Monitor](#) Run

Position Report Run Parameters

<p>*Fiscal Year <input type="text" value="2017"/> </p> <p>*Business Unit <input type="text" value="UWMSN"/> </p> <p>Division <input type="text"/> </p> <p>Department <input type="text"/></p> <p>Fund Code <input type="text"/> </p> <p>Include Addl Adj: <input checked="" type="checkbox"/></p>	<p>Employee Class</p> <p>Employee Class - All Values: <input checked="" type="checkbox"/></p> <p style="text-align: center; background-color: #ffffcc; padding: 5px; border: 1px solid #ccc;">Select Values</p>
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Save
 Notify

Add
 Update/Display

5. User will now be automatically directed to the Process Scheduler Request page. From this page, select **OK**.

8. Search for your process instance number under Process List, which will indicate the status of the report generation. When the report is complete, Run Status will be “Success” and Distribution Status will be “Posted”.
 - a. If Run Status is “Queued,” it indicates that the report generation is waiting to start.
 - b. If Run Status is “Processing,” it indicates that the report generation is processing.
 - c. Click **Refresh** at the top right of the window to refresh the status of the document.

The screenshot shows the 'Process List' tab selected. The 'Actions' section contains search filters for User ID (00699002), Type, Last, 1 Days, and a Refresh button. Below the filters is a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2082283		Application Engine	UW_CAT_POS	00699002	11/30/2015 10:26:50AM CST	Processing	N/A	Details

9. Once the Run Status hits “Success” and the Distribution Status hits “Posted,” download the output.
 - a. Click **Details**.

The screenshot shows the 'Process List' tab selected. The 'Actions' section contains search filters for User ID (00699002), Type, Last, 1 Days, and a Refresh button. Below the filters is a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2082283		Application Engine	UW_CAT_POS	00699002	11/30/2015 10:26:50AM CST	Success	Posted	Details

- b. Click **View Log/Trace** at the bottom right of the window.

Process Detail

Process	
Instance 2082283	Type Application Engine
Name UW_CAT_POS	Description CAT Position Report
Run Status Success	Distribution Status Posted

Run	Update Process
Run Control ID ABC01	<input type="radio"/> Hold Request
Location Server	<input type="radio"/> Queue Request
Server PSUNX	<input type="radio"/> Cancel Request
Recurrence	<input checked="" type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On 11/30/2015 10:27:01AM CST	Parameters Transfer
Run Anytime After 11/30/2015 10:26:50AM CST	Message Log View Locks
Began Process At 11/30/2015 10:27:08AM CST	Batch Timings
Ended Process At 11/30/2015 10:27:37AM CST	View Log/Trace

OK Cancel

- c. Under File List, click the file with the .xls extension to download the output. Note: you may have two .xls outputs if you have any additional splits.

View Log/Trace

Report

Report ID: 1168955 Process Instance: 2082283 [Message Log](#)
 Name: UW_CAT_POS Process Type: Application Engine
 Run Status: Success

CAT Position Report

Distribution Details

Distribution Node: HRDEV_RPTNOD Expiration Date: 11/29/2016

File List

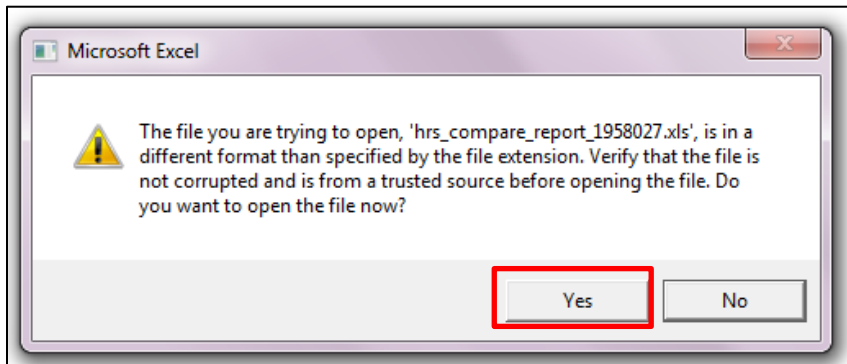
Name	File Size (bytes)	Datetime Created
AE UW CAT POS 2082283.AET	4,228	11/30/2015 10:27:37.643468AM CST
AE UW CAT POS 2082283.log	525	11/30/2015 10:27:37.643468AM CST
AE UW CAT POS 2082283.trc	205	11/30/2015 10:27:37.643468AM CST
Position Report 2082283.xls	9,472	11/30/2015 10:27:37.643468AM CST

Distribute To

Distribution ID Type	*Distribution ID
User	00699002

[Return](#)

- d. When opening the file, if an error message appears indicating that “The file you are trying to open...is in a different format than specified by the file extension,” click **Yes**.
- e. Note that different internet browsers may have different opening processes.



10. Review the report.
 - a. Open the downloaded Excel file.
 - i. A screenshot of the output file is below.
 - ii. A description of the different header fields of the output is below.
 - b. Funding splits should list as rows beneath each empl record
 - c. Job and Demographic data will repeat for all funding split rows
 - d. Jobs from the CAT should be listed first, then vacant positions, then budgeted adjustments.

Position Report						
Report Params:						
Run Control ID:	ABC01	Process Instance:	2082283			
Run Date:	11/30/2015	Run By:	00699002			
Fiscal Year:	2017	Fund:	AS,CJ,CL,CP,ET1,ET2,ET3,ET4,FA,LI,OT1,OT2,OT3,OT4,OT5,OT6,SA1,SA2,SA3,SA4,SA5,SA6,SA7,SH			
Business Unit:	UWOSH	Employee Class:	A5,SA6,SA7,SH			
Funding Division:		Include Addl Adjs:	Y			
Department:						
Planned Fiscal Year	Position Type	Name	Empl Id	Empl Rcd	Home Department	Empl Pay Class Basis Position Number

Converting Text to Number

1. Once the Position Report has processed and has been downloaded into Excel:
 - a. Convert **columns AL** (Budgeted Amt \$) & **AM** (Budgeted FTE) to number. You will need to highlight all values you wish to convert and right-click on the <!> symbol and select "Convert to number".

	AF	AG	AH	AI	AJ	AK	AL	AM	AN
GL						Distribution	Budgeted	Budgeted	
Business Unit	Fund	Dept Id	Program	Project Id	Percent (%)	Amount (\$)	FTE	Comment	
UWMSN	101	020830	1		100.00%	94921.000	1.000000		
UWMSN	101	020830	1		100.00%				
UWMSN	101	020830	1		100.00%				
UWMSN	101	020805	1		100.00%				
UWMSN	128	020870	1		100.00%				
UWMSN	128	020821	1		100.00%				
UWMSN	101	020821	7		100.00%				
UWMSN	128	020870	1		100.00%				
UWMSN	101	020821	7		100.00%				
UWMSN	128	020822	1		65.000	44336.000	0.650000		
UWMSN	101	020821	7		35.000	23873.000	0.350000		
UWMSN	101	020830	1		100.000	86266.000	1.000000		
UWMSN	101	020830	1		100.000	171700.000	1.000000		
UWMSN	128	020821	1		45.000	50659.000	0.450000		
UWMSN	101	020821	1		55.000	61917.000	0.550000		
UWMSN	128	020820	1		100.000	72392.000	1.000000		
UWMSN	101	020821	7		100.000	81420.000	1.000000		
UWMSN	101	020821	1		100.000	75502.000	1.000000		
UWMSN	128	020820	1		100.000	82586.000	1.000000		

Tables

Table 1: Output Header Fields	
Report Parameters	
Field Name	Description
Run Control ID	The run control identification entered when report was created.
Run Date	The date the report was created.
Fiscal Year	The effective date of the CAT you wish to compare against in HRS.
Business Unit	The Business Unit selected in the run control.
Funding Division	The Division (if any) selected in the run control.
Department	The Department (if any) selected in the run control.
Process Instance	The number assigned by PeopleSoft for each process.
Run By	The user ID of the user who ran the report.
Fund	The Fund Code (if any) selected in the run control
Employee Class	The employee classes included on the report's run control.
Include Additional Adjustments	Y if the 'Include Additional Adjustments' checkbox was selected on the run control.

Report Columns	
Field Name	Description
Planned Fiscal Year	Fiscal Year field value from CAT for empl records that exist in the CAT and meet the run control criteria. If Include Additional Adjustments is checked, Pull Fiscal Year field value from the AAP for vacant positions that exist in the AAP and meet the run control criteria.
Position Type (AAP Label)	If Include Additional Adjustments is checked, pull value for Position Type (either Vacant or Bud Adj.) for records that exist in the AAP and meet the run control criteria.
Name	Employee First & Last name from HRS for empl records that exist in the CAT and meet the run control criteria. If Include Additional Adjustments is checked this field will be blank for AAP positions.
EmplID	EmplID from HRS for empl records that exist in the CAT and meet the run control criteria. If Include Additional Adjustments is checked this field will be blank for AAP positions.
Empl Rcd	Empl Record from HRS for empl records that exist in the CAT and meet the run control criteria. If Include Additional Adjustments is checked this field will be blank for AAP positions.
Home Dept/ Funding Dept for Additional Adjustments	Home Dept from HRS for empl records that exist in the CAT and meet the run control criteria. If Include Additional Adjustments is checked this field will be populated by the funding deptid for AAP positions.
Empl Class	Empl Class from HRS for empl records that exist in the CAT and meet the run control criteria. If Include Additional Adjustments is checked this field will be blank for AAP positions.
Pay Basis	Pay Basis from HRS for empl records that exist in the CAT and meet the run control criteria. If Include Additional Adjustments in checked this field will be blank for AAP Positions.
Position Number	The Position Number from CAT for empl records that exist in the CAT and meet the run control criteria. If include Additional Adjustments is checked pull position number field value from the AAP for vacant positions that exist in the AAP and meet the run control criteria (and who have position

	number entered).
Adjustment Type	If include Additional Adjustments is checked, Pull Adjustment Type field value from the AAP for AAP positions that exist in the AAP and meet the run control criteria.
Job Code	Job Code from CAT for empl records that exist in the CAT and meet the run control criteria. If include Additional Adjustments is checked pull job code field value from the AAP for vacant positions that exist in the AAP and meet the run control criteria (and who have job code entered).
Title	Title from CAT for empl records that exist in the CAT and meet the run control criteria.
Planned Title	Planned Title from CAT for empl records that exist in the CAT and meet the run control criteria. If include Additional Adjustments is checked pull Title field value from the AAP for vacant positions that exist in the AAP and meet the run control criteria.
Total Planned FTE	Planned FTE field from the CAT for empl records that exist in the CAT and meet the run control criteria. If include Additional Adjustments is checked pull FTE field value from the AAP for vacant positions that exist in the AAP and meet the run control criteria.
Base Compensation Rate	The Base Compensation Rate from the CAT for empl records that exist in the CAT and meet the run control criteria. If Include Additional Adjustments is checked this field will be blank for AAP positions.
Increase 1 Action Reason	The Action Reason associated with the first non-merit comp increase from the CAT empl records that exist in the CAT and meet the run control criteria. If no additional increases have been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Increase 1 \$ Amount	The comprate change amount associated with the first non-merit comp increase from the CAT for empl records that exist in the CAT and meet the run control criteria. If no additional increases have been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Increase 1 % Amount	The comprate change percentage associated with the first non-merit comp increase from the CAT for empl records that exist in the CAT and meet the run control criteria. If no additional increases have been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Increase 2 Action Reason	The Action Reason associated with the second non-merit comp increase from the CAT empl records that exist in the CAT and meet the run control criteria. If no additional increases have been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Increase 2 \$ Amount	The comprate change amount associated with the second non-merit comp increase from the CAT for empl records that exist in the CAT and meet the run control criteria. If no merit has been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Increase 2 % Amount	The comprate change percentage associated with the second non-merit comp increase from the CAT for empl records that exist in the CAT and meet the run control criteria. If no merit has been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Increase 3 Action Reason	The Action Reason associated with the third non-merit comp increase from the CAT empl records that exist in the CAT and meet the run control criteria. If no additional increases have been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions

Increase 3 \$ Amount	The comprate change amount associated with the third non-merit comp increase from the CAT for empl records that exist in the CAT and meet the run control criteria. If no merit has been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Increase 3 % Amount	The comprate change percentage associated with the third non-merit comp increase from the CAT for empl records that exist in the CAT and meet the run control criteria. If no merit has been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Pre-Merit Adjusted Comprate	The UW_CAT_COMPRATE field plus all non-merit increases from the CAT for empl records that exist in the CAT and meet the run control criteria. If no non-merit increases have been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Merit \$ Amount	The comprate change amount associated with the Action Reason Merit from the CAT for empl records that exist in the CAT and meet the run control criteria. If no merit has been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Merit % Amount	The comprate change percentage associated with the Action Reason Merit from the CAT for empl records that exist in the CAT and meet the run control criteria. If no merit has been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Chancellor's Discretionary \$	The comprate change amount associated with the Action Reason Chancellor's discretionary from the CAT for empl records that exist in the CAT and meet the run control criteria. If no Chancellor's discretionary increase has been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Chancellor's Discretionary %	The comprate change percentage associated with the Action Reason Chancellor's discretionary from the CAT for empl records that exist in the CAT and meet the run control criteria. If no Chancellor's discretionary increase has been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Final Comprate	The UW_CAT_COMPRATE field plus all increases from the CAT (UW_CAT_COMPRATE+ UW_CAT_CHANGE_AMT) for empl records that exist in the CAT and meet the run control criteria. If no non-merit increases have been entered this field will appear blank. If Include Additional Adjustments is checked this field will be blank for AAP positions
Adjusted Base Salary (Based on Planned FTE)	Derive Adjusted Base salary based on Base CAT compensation rate, entered increases, and FTE (UW_CAT_COMPRATE+ UW_CAT_CHANGE_AMT)*Planned FTE
General Ledger Business Unit (GLBU)	For CAT jobs, the General Ledger Business Unit (GLBU) of this empl record from the account code in the CAT If Include Additional Adjustments is checked, the General Ledger Business Unit (GLBU) of this position from the account code in the AAP
Fund	For CAT jobs, pull the Fund of this empl record from the account code in the CAT If Include Additional Adjustments is checked, the fund of this position from the account code in the AAP
DeptID	For CAT jobs, pull the DeptID of this empl record from the account code in the CAT If Include Additional Adjustments is checked, the DepID of this position from the account code in the AAP
Program	For CAT jobs, pull the Program of this empl record from the account code in the CAT If Include Additional Adjustments is checked, the Program of this position from the account

	code in the AAP
ProjectID	For CAT jobs, pull the ProjectID of this empl record from the account code in the CAT If Include Additional Adjustments is checked, this field will be blank for AAP positions.
Distribution %	For CAT jobs, pull distribution percentage of each funding split for the empl record If Include Additional Adjustments is checked, this field will be blank for AAP positions.
Budgeted Amount	For CAT jobs, pull budgeted amount of each funding split for the empl record If Include Additional Adjustments is checked, pull final budgeted amount from the AAP.
Budgeted FTE	For CAT jobs, pull budgeted FTE of each funding split for the empl record If Include Additional Adjustments is checked, pull FTE from the AAP (if that field is populated)
Repeat Fund, DeptID, Program and Project ID for all funding splits this emplid/emprcd combo has. If Include Additional Adjustments is checked, Vacant and Budget Adjustment positions will only have one funding string.	
Comments	The Comments field for CAT jobs, Pull the description field for Vacant/Budget adj positions from the AAP.