

# KB – CAT Position Report

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## Purpose and Overview

The Position Report is a pull of key information on all positions (CAT Records) and Vacant/Bud Adjustment rows (Additional Adjustments Page records) based on selected run control criteria.

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.

## Process Inputs

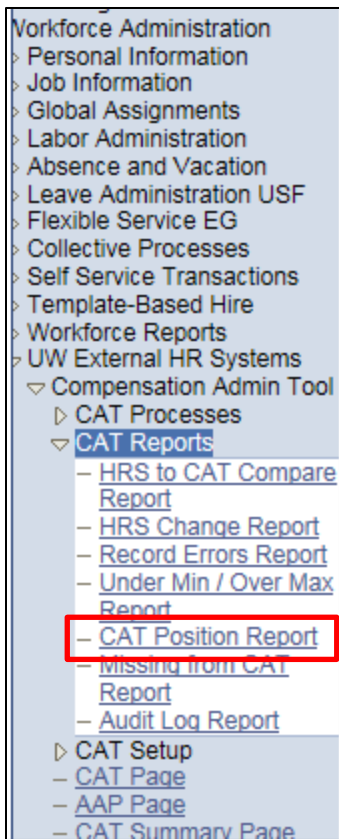
- Fiscal Year
- Business Unit
- Division
- Dept ID
- Employee Class

## 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 > HRS to 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.*

A screenshot of the 'CAT Position Report' form. The form has a title 'CAT Position Report' at the top. Below the title, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs, there is a text input field labeled 'Run Control ID:' with the value 'ABC01' entered. Below the input field, there is a yellow button labeled 'Add' with a red rectangular box around it. At the bottom of the form, there are two links: 'Find an Existing Value' and '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

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Run Control ID: ABC01 [Report Manager](#) [Process Monitor](#) Run

Position Report Run Parameters

\*Fiscal Year

\*Business Unit

Division

Department

Fund Code

Include Addl Adj:

Employee Class

Employee Class - All Values:

Select Values

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

**Process Scheduler Request**

User ID: 00699002      Run Control ID: ABC01

Server Name:       Run Date: 11/30/2015

Recurrence:       Run Time: 10:26:50AM     

Time Zone:  🔍

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	CAT Position Report	UW_CAT_POS	Application Engine	Web <input type="text"/>	TXT <input type="text"/>	<a href="#">Distribution</a>

- Note the Process Instance number under the Process Monitor link. This designates the specific instance of the report run.

**Position Report**

Run Control ID: ABC01      [Report Manager](#)    [Process Monitor](#)   

Process Instance: 2082283

**Position Report Run Parameters**

\*Fiscal Year: 2017 🔍

\*Business Unit: UWOSH 🔍

Division:  🔍

Department:

Fund Code:  🔍

Include Addl Adj:

**Employee Class**

Employee Class - All Values:

- Click **Process Monitor** at the top right of the window.
- 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".
  - If Run Status is "Queued," it indicates that the report generation is waiting to start.
  - If Run Status is "Processing," it indicates that the report generation is processing.
  - Click **Refresh** at the top right of the window to refresh the status of the document.

Process List Server List

**Actions**

User ID 00699002  Type  Last  1 Days  Refresh

Server  Name  Instance  to

Run Status  Distribution Status   Save On Refresh

**Process List** Personalize | Find | View All | First 1-2 of 2 Last

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	<a href="#">Details</a>

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

Process List Server List

**Actions**

User ID 00699002  Type  Last  1 Days  Refresh

Server  Name  Instance  to

Run Status  Distribution Status   Save On Refresh

**Process List** Personalize | Find | View All | First 1-2 of 2 Last

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	<a href="#">Details</a>

- 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

**Run Control ID** ABC01  
**Location** Server  
**Server** PSUNX  
**Recurrence**

### Update Process

**Hold Request**  
 **Queue Request**  
 **Cancel Request**  
 **Delete Request**  
 **Restart Request**

### Date/Time

**Request Created On** 11/30/2015 10:27:01AM CST  
**Run Anytime After** 11/30/2015 10:26:50AM CST  
**Began Process At** 11/30/2015 10:27:08AM CST  
**Ended Process At** 11/30/2015 10:27:37AM CST

### Actions

[Parameters](#)      Transfer  
[Message Log](#)      [View Locks](#)  
[Batch Timings](#)  
[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**

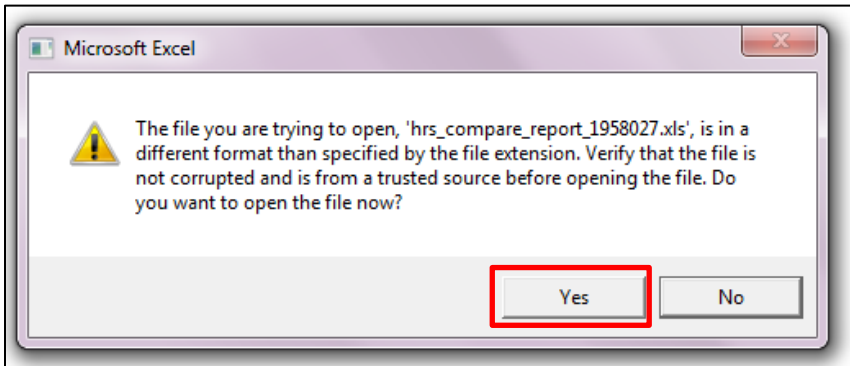
Name	File Size (bytes)	Datetime Created
<a href="#">AE UW CAT POS 2082283.AET</a>	4,228	11/30/2015 10:27:37.643468AM CST
<a href="#">AE UW CAT POS 2082283.log</a>	525	11/30/2015 10:27:37.643468AM CST
<a href="#">AE UW CAT POS 2082283.trc</a>	205	11/30/2015 10:27:37.643468AM CST
<a href="#">Position Report 2082283.xls</a>	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.
  - a. Funding splits should list as rows beneath each empl record
  - b. Job and Demographic data will repeat for all funding split rows
  - c. Jobs from the CAT should be listed first, then vacant positions, then budgeted adjustments.

Position Report						
<b>Report Params:</b>						
Run Control ID:	ABC01	Process Instance:	2082283			
Run Date:	11/30/2015	Run By:	00699002			
Fiscal Year:	2017	Fund:				
Business Unit:	UWOSH	Employee Class:	AS,CJ,CL,CP,ET1,ET2,ET3,ET4,FA,LI,OT1,OT2,OT3,OT4,OT5,OT6,SA1,SA2,SA3,SA4,SA5,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

## 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)	If Include Additional Adjustments is checked, pull value for Position Type (either Vacant or Bud



Label)	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. <b>If no merit has been entered this field will appear blank.</b> 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. <b>If no merit has been entered this field will appear blank.</b> 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. <b>If no merit has been entered this field will appear blank.</b> 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. <b>If no merit has been entered this field will appear blank.</b> 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
GLBU	For CAT jobs, the GLBU of this empl record from the account code in the CAT If Include Additional Adjustments is checked, the 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 second funding split of empl record with error from the CAT If Include Additional Adjustments is checked, this field will be blank for AAP positions.
Budgeted Amount	For CAT jobs, pull budgeted amount of second funding split of empl record with error from the CAT If Include Additional Adjustments is checked, pull final budgeted amount from the AAP.
Budgeted FTE	For CAT jobs, pull budgeted FTE of second funding split of empl record with error from the CAT 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.