LI POSITION SUMMARY
REPORT DESCRIPTION B0063 | WEB INTELLIGENCE

BOBJ

The purpose of this report description is to explain how to obtain position summary information related to Legislative Increases in the Integrated HR-Payroll System.

REPORT DESCRIPTION

This report contains two sub-reports:

- The **B0063: LI Position Summary** report provides a summary of budget information for all positions (vacant and filled) for the organizational unit(s) selected. It displays a summary of Legislative Increases applied to the employee and budgeted salaries, if applicable by fund, totaled by business area, along with a grand total at the bottom of the report.
- The **LI Vacant Position Summary** report lists only the vacant positions for the organizational unit(s) selected. It displays the prior budgeted salary, budgeted salary increases, if applicable, current budgeted salary and job minimum and maximum pay. A grand total is displayed at the bottom of the report.

## REPORT LOCATION

Legislative Increase

REPORT USES

- The B0063 LI Position Summary report is used by agencies to view a summary of Legislative Increases on positions - vacant and filled.

- The B0063 report can be used to determine the cost of the LI by business area for the organizational unit(s) selected.

- The LI Vacant Position Summary report is used to determine the amount of Legislative Increase that was applied for vacant positions.

- The LI Vacant Position Summary report is used to identify positions where the budgeted salary was increased in error.

How to generate this report

This report has three mandatory prompts, five optional prompts and two exclusion prompts.
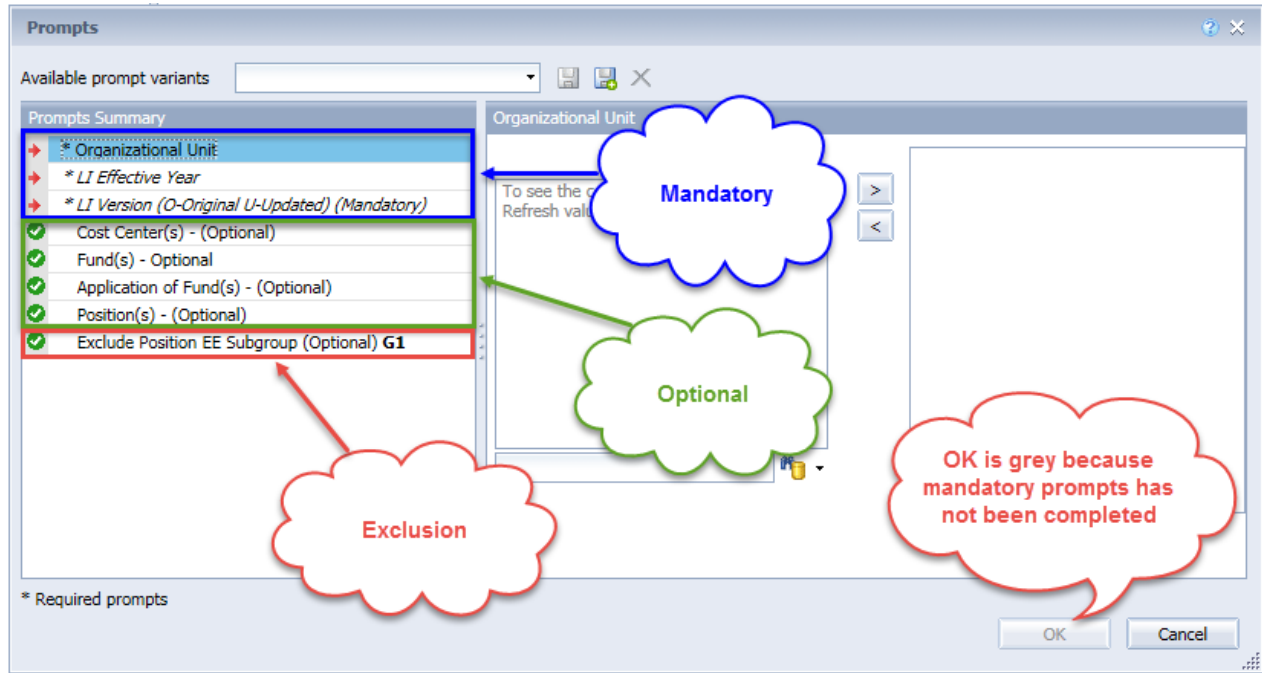
Mandatory Prompts

Mandatory prompts have a red arrow indicator (➔) followed by an asterisk (*) on the left side of the prompts. When a valid value(s) is entered, this indicator will turn into a green check mark (✓).

➔ ***Organizational Unit:** To select data for this prompt:
- Make sure the "Organizational Unit" prompt to selected (1).
- Click the "Refresh Values" icon to see the list of Org Units (2).
- Navigate down to select the desired Org Unit (3).
- Click the right arrow to add it to the selection box (4).
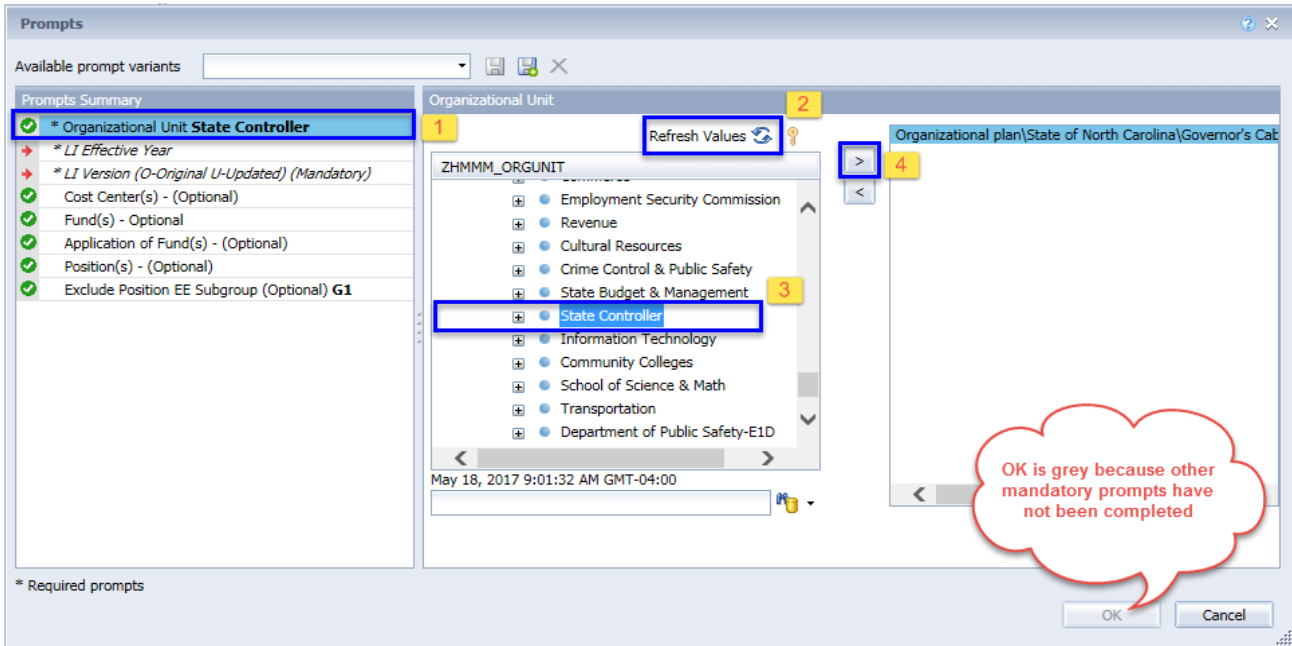
➔ **LI Effective Year** – To select data for this prompt:
- Make sure the LI Effective Year prompt is selected (1).
- If the LI Effective Year is known, type the year directly in (2). In this case, skip steps (3) through (5).
- To see a list of values for LI Effective Year, click "Refresh Values" (3).
- In the search box, narrow down the date selection by using the wildcard *YYYY format and press the enter key (4).
- Select the desired date from the list (5).
- Click the right arrow button (6).
- If no other prompts are required, click the "OK" button to run the report.

➡️ **LI Version (valid choices are: O-Original U-Updated – other values are for internal use only):**
O – Original is for the official LI Transmittal that was captured immediately after the Legislative Increase was processed in the Integrated HR-Payroll System. It reflects the effect of the update programs on employee salaries and position budgets.

U – Updated is the LI Transmittal report that includes any updates made to the system after the **Original Transmittal** information was captured. Examples of these updates are individual Legislative Increase actions which may have been processed via OM or PA workflow, as well as any other adjustments to the master data effective as of July 1 for the LI effective year. Use this version to validate any corrections made to the LI results via SAP transactions.

> **Please note!** No history is retained for the (U) updated version of the LI report for previous years. The updated version always relates to the most current LI year. Historical (O) original versions are available for all years since the inception of the Integrated HR-Payroll system.

To select data for this prompt:

- Make sure the "LI Version (O-Original U-Updated)" prompt is selected (1).
- Click the "Refresh Values" icon to see the list of LI Version (2).
- To see the key value for each LI Version, click the key icon (3).
- Select the desired LI Version Type (4).
- **OR**, if the LI Version key or name are known, skip steps (2) through (4) and enter it directly in (5).
- Click the right arrow to add the Plan Type to the selection box (6).
- If no other prompts are required, click the "OK" button to run the report.
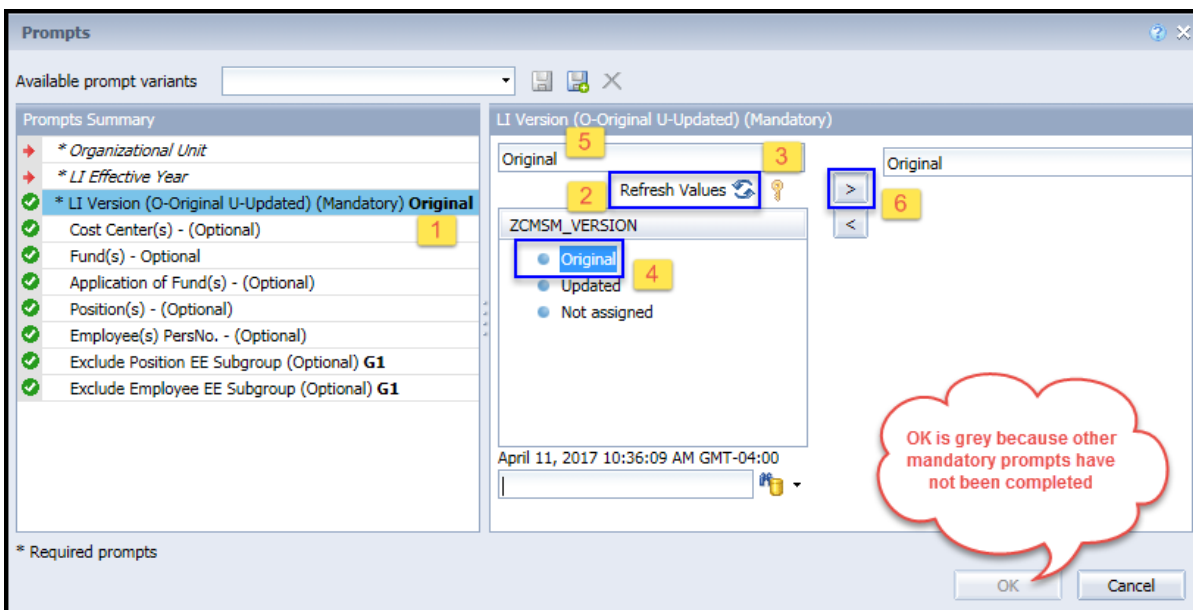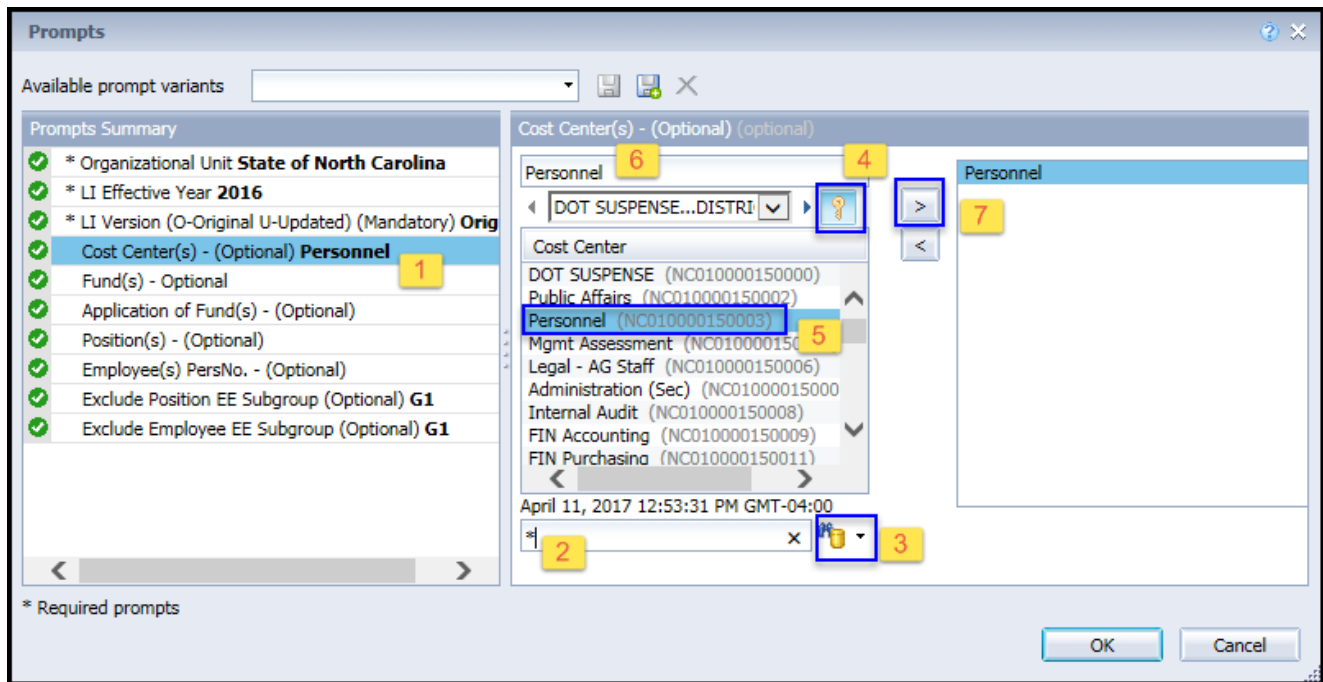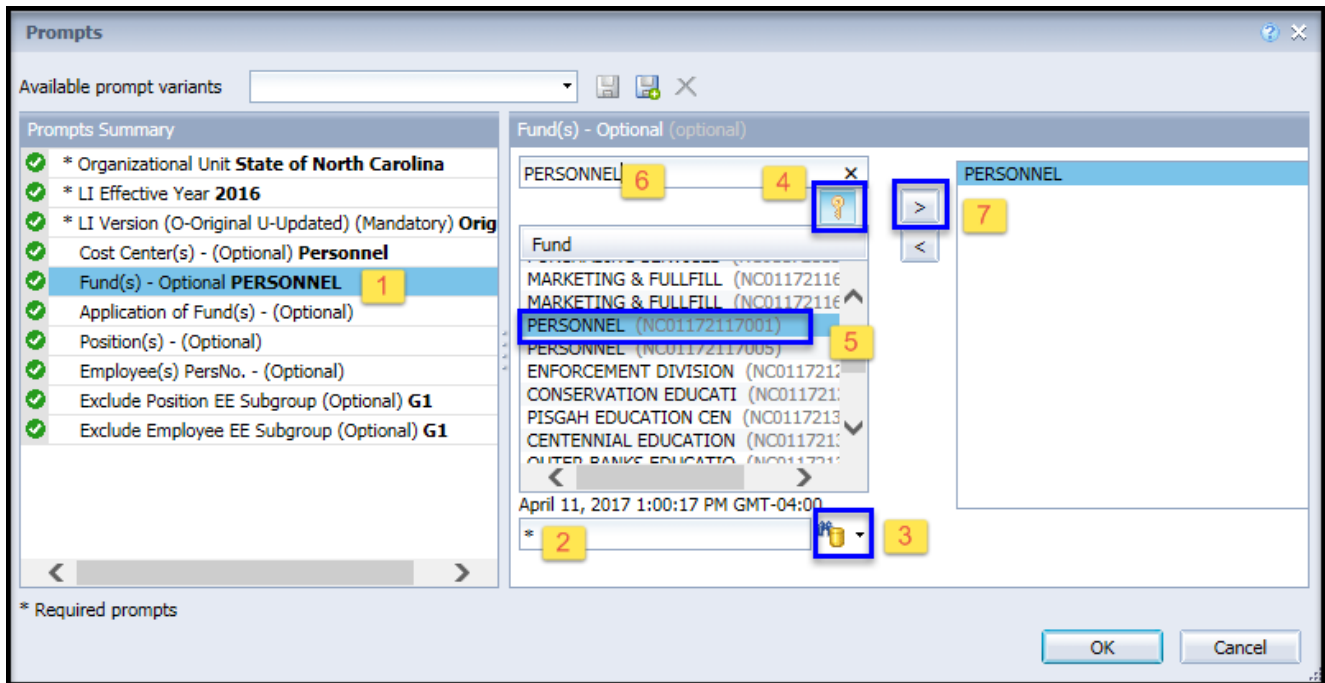
Optional Prompts

Optional prompts are indicated with a green check mark (✓) but are not pre-filled or required. They are used to assist with limiting the amount of data that is retrieved into the body of the report. The optional prompts on this report are:

> **Note:** Sometimes search on with *wildcard in position field returns an error if the number of position searches exceeds the system limit. In those situations, choose a smaller agency Org Unit hierarchy or enter a known position or run the report with Mandatory prompts and return to the prompt screen to choose one or more positions.

✓ **Cost Center(s) – (Optional)** – To select data for this prompt:
- Make sure the "Cost Center(s) – (Optional)" prompt is selected (1).
- Enter * wildcard in the search box (2).
- Click the search icon (3).
- Click the key icon to display the Cost Center with the name and key (4).
- Select the cost center entry (5).
- **OR,** if the Cost Center key or name is known, skip steps (2) through (5) and enter it directly in (2).
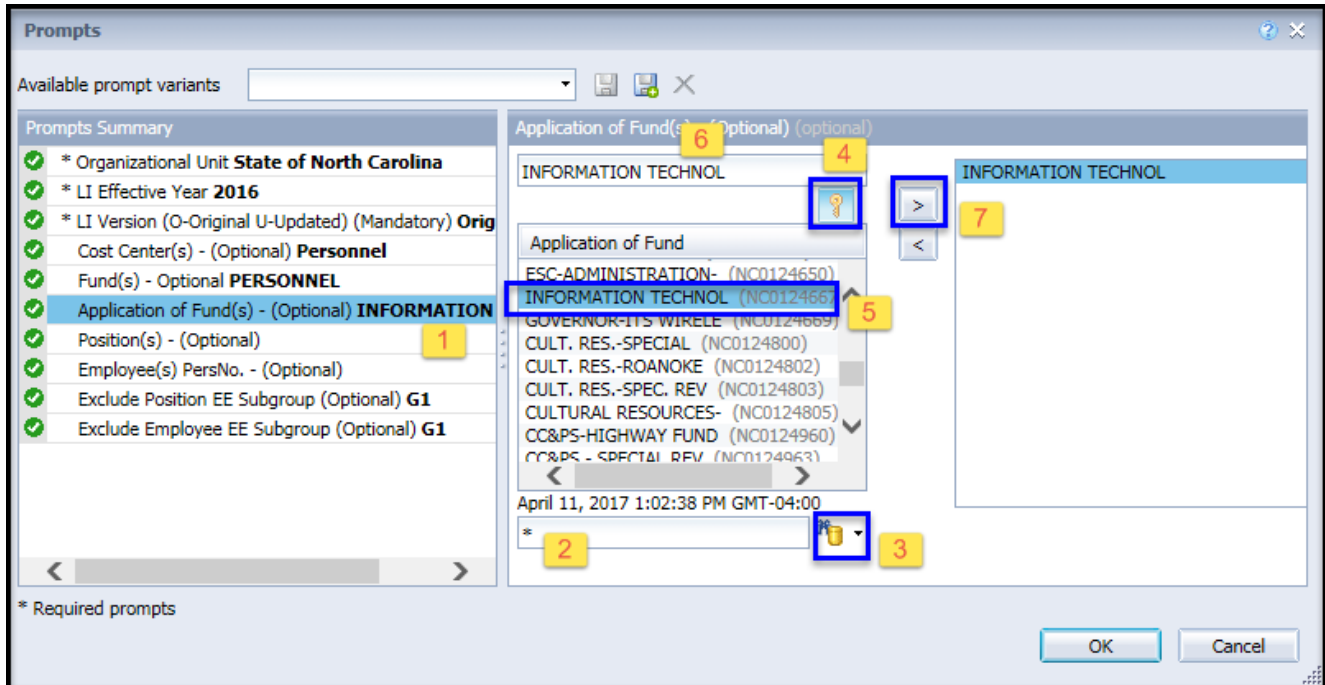- Click the right arrow to add the cost center to the selection box (7).

✓ **Fund(s) – (Optional)** – To select data for this prompt:
- Make sure the "Fund(s) – (Optional)" prompt is selected (1).
- Enter * wildcard in the search box (2).
- Click the search icon (3).
- Click the key icon to display the Fund with the name and key (4).
- Select the Fund entry (5).
- **OR**, if the Fund key or name is known, skip steps (2) through (5) and enter it directly in (6).
- Click the right arrow to add the Fund to the selection box (7).

✓ **Application of Fund(s) – (Optional)** – To select data for this prompt:
  - Make sure you have selected the "Application of Fund(s) – (Optional)." (1).
  - Enter * wildcard in the search box (2).
  - Click on the search icon (3).
  - Click on the key symbol to display the Application of Fund with the name and key (4).
  - Select the Application of Fund entry (5), OR if the Application of Fund key or name is known, skip steps (2) through (5) and enter it directly in (6).
 - Click the right arrow to add the Application of Fund to the selection box (7).

✓ **Position(s) - (Optional):** To select data for this prompt:
- Make sure the "Position(s) - (Optional)" prompt is selected (1).
- Enter a search text with an asterisk (*) in the search box to view the list of values for Position (2).
- Click the search icon (3).
- To see the key value for each Position, click the key icon (4).
- Select the desired Position (5).
- **OR**, if you know the Position key or Position name, you can skip steps 2 through 5 and enter it directly in (6).
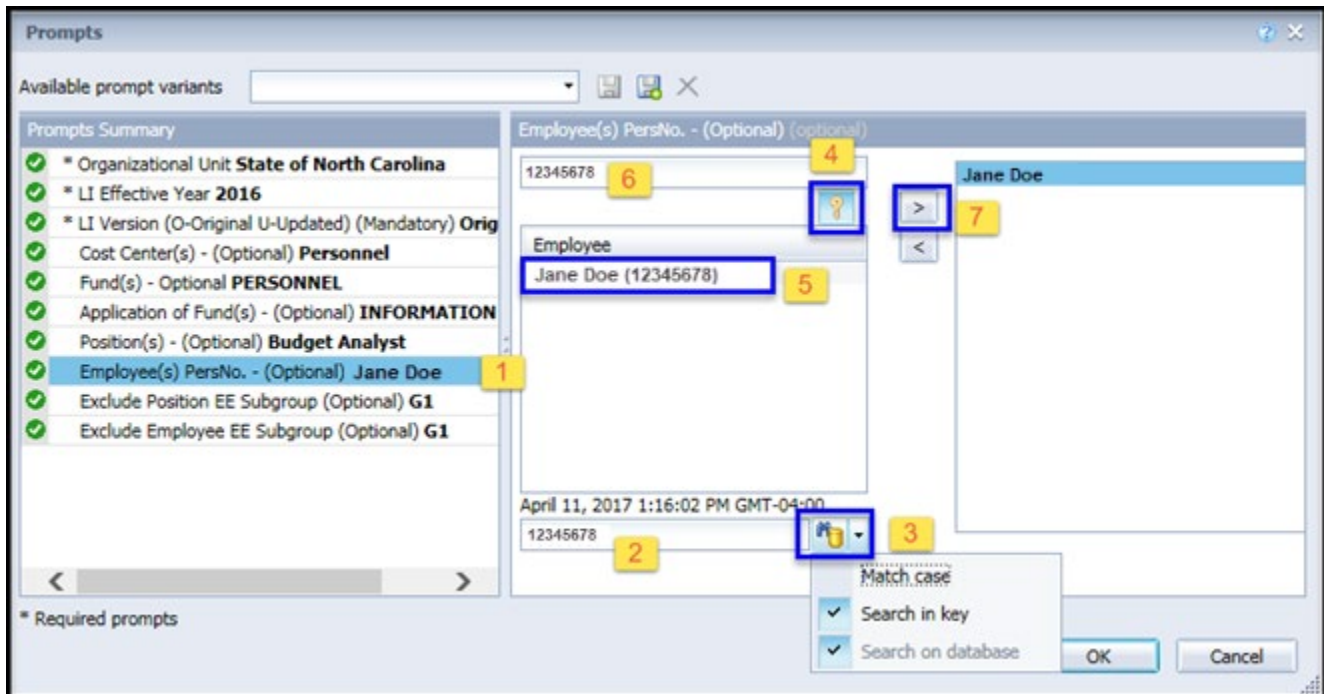- Click the right arrow to add the Position to the selection box (7).
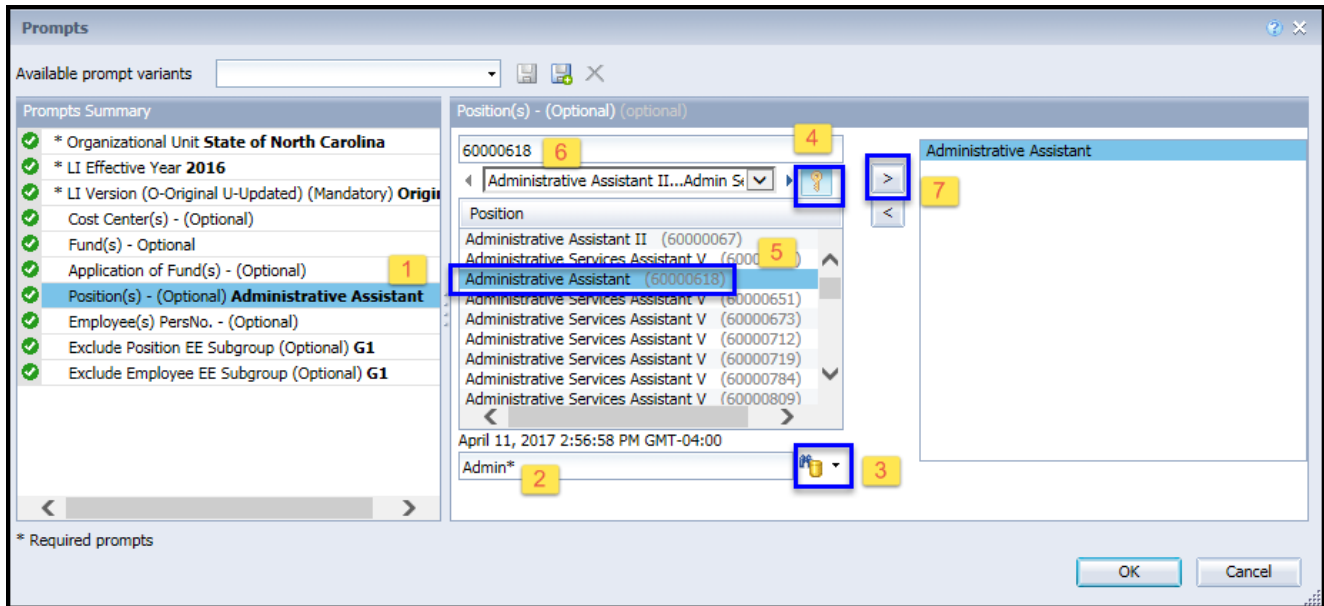
NOTE: Since the system has a large number of employees, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If the employee number is not known and a name search must be done, narrow down the search by using the wildcard with specific text strings when looking for an employee by name such as:

Jane*Doe*
*Doe

If the employee number is known, it is best to use the manual entry field (in step 7) to enter the selection.

✓ **Employee(s) PersNo. - (Optional):** To select data for this prompt:
- Make sure the "Employee(s) PersNo. - (Optional)" prompt is selected (1).
- Enter an employee number in the search box to verify the employee's name (2).
- Click the search icon drop-down arrow and select "Search in key" (3).
- Click the search icon (3).
- To see the employee number, click the key icon (4).
- Select the desired Employee (5).
- **OR**, if the employee number is known, skip steps (2) through (5) and enter it directly in (6).
- Click on the right arrow to add the Employee to the selection box (7).

NOTE: Since the system has a large number of employees, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If the employee number is not known and a name search must be done, narrow down the search by using the wildcard with specific text strings when looking for an employee by name such as:

Jane*Doe*
*Doe

If the employee number is known, it is best to use the manual entry field (in step 7) to enter the selection.

Exclusion Prompts

Exclusion prompts are also indicated with a green check mark (✓) but are generally prefilled with a specific set of data values. They are provided as a way to exclude specified data by default while allowing customers the flexibility of changing them when necessary. Any rows containing data values listed in the exclusion selection box will not be fetched into the report.
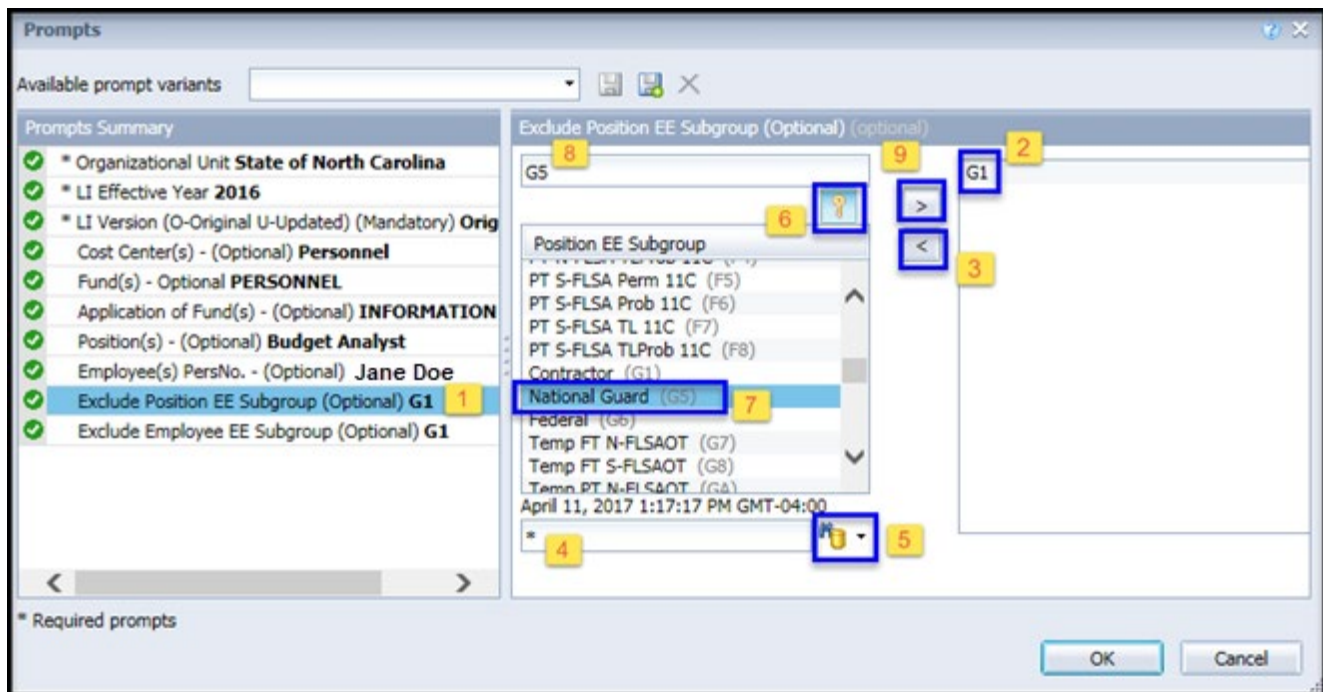
✓ **Exclude Position EE Subgroup (Optional) G1**

To remove this exclusion:

- Make sure the "Exclude Position EE Subgroup (Optional) G1" prompt is selected (1).
- Select one or more Position EE Subgroup(s) to remove from the 'Selected Value(s) box (2).
- Click the left arrow icon to remove the desired Position EE Subgroup(s) (3).

To add the exclusions:

- Enter * wildcard in the search box (4).
- Click the search icon (5).
- Click the Key icon to display the Position EE Subgroup(s) with name and key (6).
- Select the desired Position EE Subgroup(s) (7).
- **OR**, the Position EE Subgroup(s) is known, skip steps (4) through (7) and enter it directly in (8).
- Click the right arrow to add the Position EE Subgroup(s) to the selection box (9).

✓ **Exclude Employee EE Subgroup (Optional) G1**

To remove this exclusion:

- Make sure the "Exclude Employee EE Subgroup (Optional) G1" prompt is selected (1).
- Select one or more Employee EE Subgroup(s) to remove from the 'Selected Value(s) box (2).
- Click the left arrow icon to remove the desired Employee EE Subgroup(s) (3).

To add the exclusions:

- Enter * wildcard in the search box (4).
- Click the search icon (5).
- Click the Key icon to display the Employee EE Subgroup(s) with name and key (6).
- Select the desired Employee EE Subgroup(s) (7).
- **OR**, if the Employee EE Subgroup(s) is known, skip steps (4) through (7) and enter it directly in (8).
- Click the right arrow to add the Employee EE Subgroup(s) to the selection box (9).
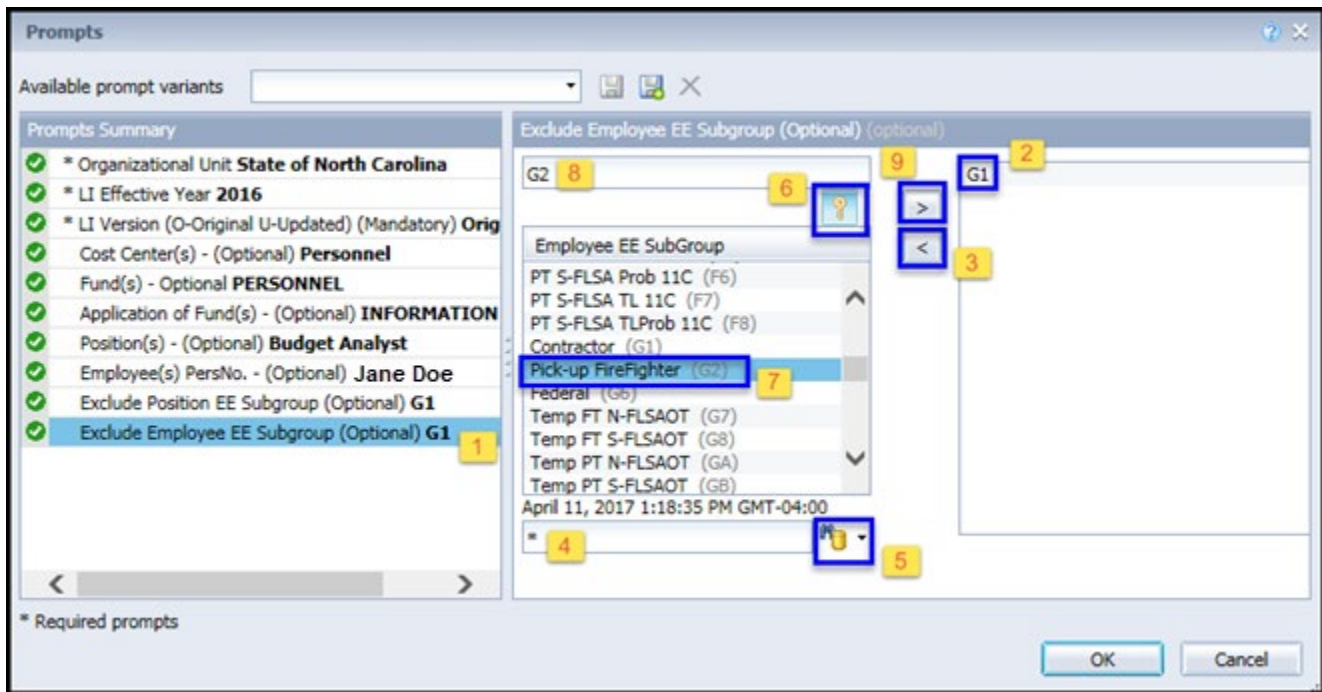
Initial Layout

The report contains two sub-reports, and each report is located on a separate tab. Tabs are located at the bottom of the report.

➔ **B0063 LI Position Summary** tab - This tab is the default report displayed when the report is executed. It lists a summary of filled and vacant positions by funding information. This report breaks and totals each business area within the organizational unit(s) selected. Below is a sample of the report, which shows the columns available on the base report:

B0063: LI Position Summary

LI Effective Year: 2022

Business Area Desc	Business Area	Personnel Area	FM Area	Application of Fund	Fund
Office of the State Controller	11111	State Controller	State of North Carolina	333333	2222222

Continued……

NCAS Account	NCFS Account	Position EE Subgroup	Funding Source	Position FTE
666666	99999999	FT N-FLSAOT TL	Receipts	1.0000
Business Area Desc - Office of the State Controller				1.0000
			Total	1.0000

Continued……

Emp Prior Salary	Emp Salary Increase	Emp Current Salary	Prior Budgeted Salary	Budgeted Salary Increase	Current Budgeted Salary
0.00	0.00	0.00	85,000.00	0.00	85,000.00
0.00	0.00	0.00	85,000.00	0.00	85,000.00
0.00	0.00	0.00	85,000.00	0.00	85,000.00

➔ **LI Vacant Position Summary** tab – This report tab can be accessed by clicking the LI Vacant Position Summary tab at the bottom of the report. It lists a summary of funding information for vacant positions only. This report breaks and totals on each business area within the organizational unit(s) selected. Below is a sample of the report, which shows the columns available on the base report:

LI Vacant Position Summary

LI Effective Year: 2022

Business Area Desc	Business Area	Org Unit	Org Unit Desc	Position	Position Desc	Position EE Subgroup	Application of Fund	NCAS Account	NCFS Account
Office of the State Controller	1111	2222222	North Carolina Financial Systems	77777777	State Controller Financial Specialst I	FT N-FLSAOT TL	444444	33333	656555566

Continued…….

Date : 10/2/23

| Order	Order Desc	Funding Source	Position FTE	Number Of Positions	Prior Budgeted Salary	Budgeted Salary Increase	Current Budgeted Salary	Job Min Pay	Job Max Pay
2222222222	333333333333	Receipts	1.0000	1.00	85,000.00	0.00	85,000.00	61,209.00	107,116.00
Business Area Desc - Office of the State Controller			**1.0000**	**1.00**	**85,000.00**	**0.00**	**85,000.00**		
		Total	**1.0000**	**1.00**	**85,000.00**	**0.00**	**85,000.00**		

Available Objects

This is a list of the available objects that can be added to the report, once in Design mode:

Special Report Considerations/Features

- No history is retained for the (U) updated version of the LI report for previous years. The updated version always relates to the most current LI year.

- Historical (O) original versions are available for all years since the inception of the Integrated HR-Payroll System.

- **NCFS Accounting Segments** - are available for reporting in this report as drag and drop from Available Objects.

  - NCFS accounting segments here are specific to an NCFS internal order in SAP HR/Payroll ERP system. Transactions with no NCFS internal orders will not display values for the NCFS segments in the BI BOBJ report.

    - **NCFS Agency, NCFS Agency Program, NCFS AMU, NCFS Budget Code, NCFS Budget Fund, NCFS Funding Source, NCFS Interfund, NCFS Project, NCFS User Define 1, NCFS User Define 2, NCFS User Define 3**

  - Agencies (like NCDOT, DES or DWS) that do not use NCFS Internal Orders will not see the values for the above NCFS segments in reports.

  - **NCFS Account** and **Budget Funding Source (OSBM)** are available for reporting. Values are corresponding crosswalk to SAP GL Account and Funding Source in SAP HR Payroll system.

  - **Financial Key** is representative of internal order from NCFS and old NCAS systems.

  - NCDOT (NC02) specific fields **DOT NCFS AMU** and **DOT NCFS Budget Fund** are listed as BOBJ Variables in this report and are derived from NCDOT cost centers and Person Responsible (**Addl Center Ref**) values from SAP HR Payroll ERP system.
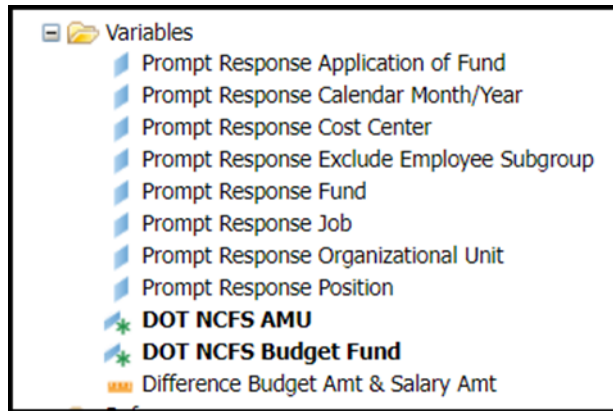
Change Log

- Effective 2/15/2017
  - Initial creation of the report.
- Effective 9/16/20
  - Updated format, assigned reference number, and made accessible. C. Ennis & L. Lee
- Effective 9/21/20
  - Added Alt Text. L. Lee
- Effective 12/15/22
  - Removed Disability Code from Employee attributes (expanded list) in Available Objects.
    T. Cooper
- Effective 1/6/22
  - Added Alt Text, corrected spelling, and grammar. L. Williams
- Effective 10/9/23
  - Added NCFS Accounting Segments