



EMPLOYEE SALARY ACTIONS WITH BUDGET DETAIL

REPORT DESCRIPTION B0139 | WEB INTELLIGENCE

BOBJ

The purpose of this report description is to explain how to generate the Employee Salary Actions with Budget Detail Report.

REPORT DESCRIPTION

This report shows employee salary actions and budget detail corresponding with the action Effective Date. Budgeted and salary amounts shown are based on the funding percent designated by the Cost Distribution for the position. Budget information includes Fund, Application of Fund, Funding Source, and Cost Center.

REPORT LOCATION

PA: Actions & Budget

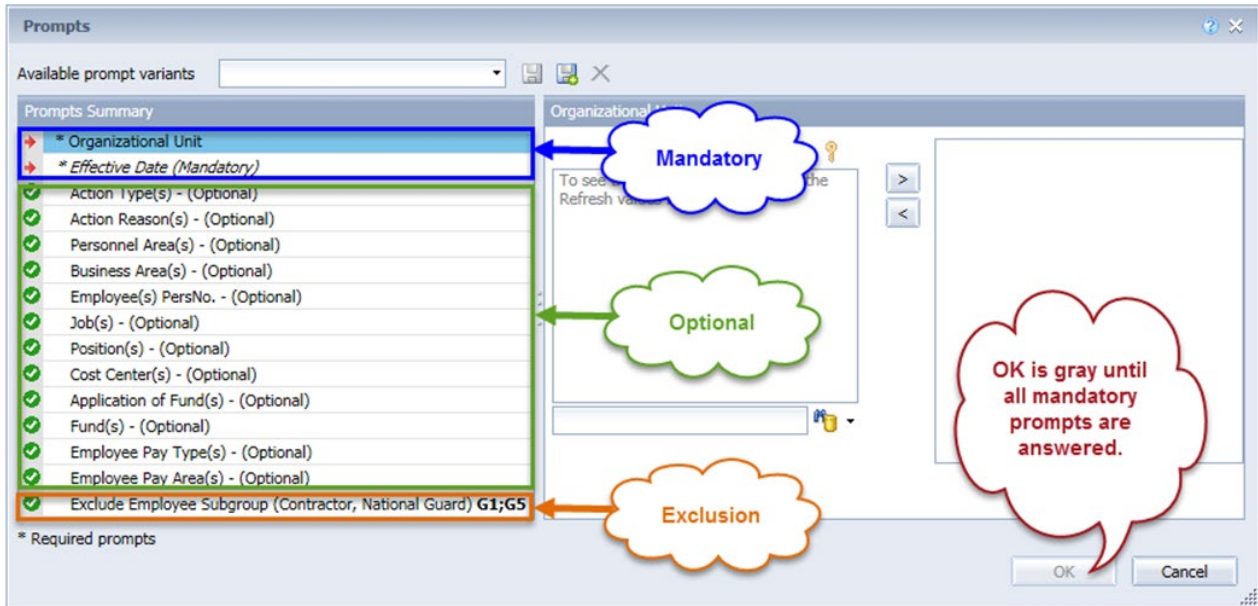
REPORT USES

- Action and Budget Monitoring to help with reconciling employee salary against the position's budget amount by funding source.
- Central Budget would use this new report in conjunction with confirming available salary reserve balances/deficits.
- HR would use it to ensure the budget/salary matches and that the funding is correct on the actions.

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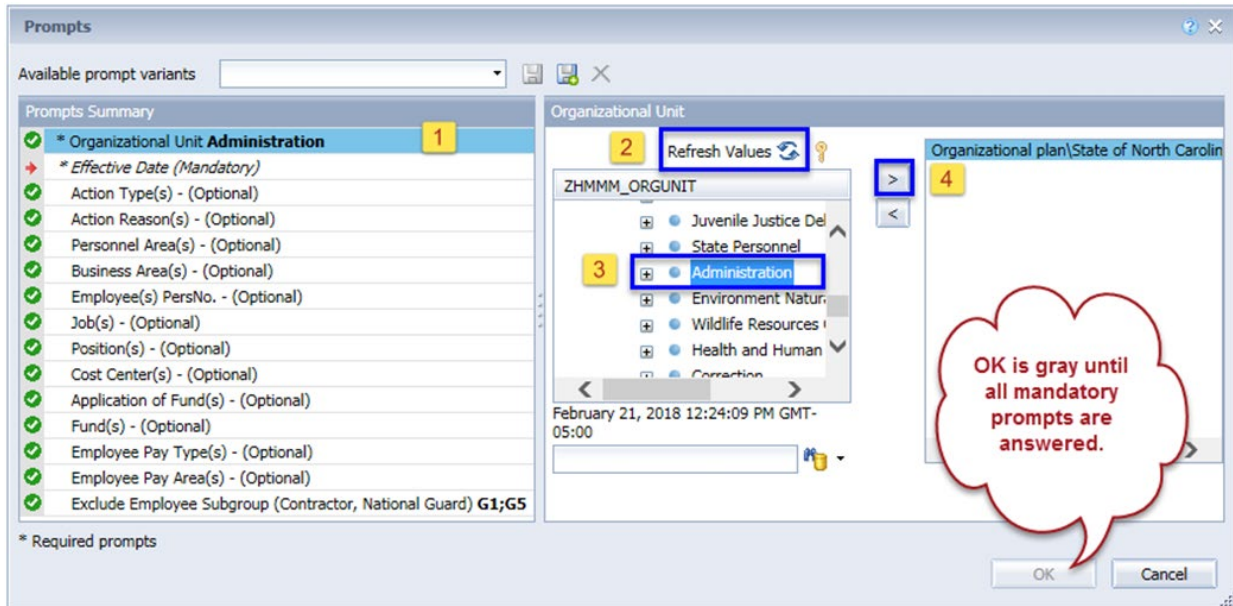
How to generate this report



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 is selected (1).
 - Click the “Refresh Values” icon to see the list of Org Units (2).
 - Navigate down to the desired Org Unit (3).
 - Click the right arrow to add it to the selection box (4).



- ***Effective Date (Mandatory):** To select data for this prompt:
- Make sure you have “Effective Date (Mandatory)” prompt selected (1).
 - Enter the desired Start value for the range (2).
 - Enter the desired End value for the range (3).
 - OR choose a date by using the calendar icon (4).

The screenshot shows a software window titled "Prompts". At the top, there is a dropdown menu for "Available prompt variants". Below this is a "Prompts Summary" list with several items, each preceded by a green checkmark. The second item, "* Effective Date (Mandatory) 7/1/2012;7/31/2012", is highlighted in blue and has a yellow box with the number "1" next to it. Other items in the list include "Organizational Unit Administration", "Action Type(s) - (Optional)", "Action Reason(s) - (Optional)", "Personnel Area(s) - (Optional)", "Business Area(s) - (Optional)", "Employee(s) PersNo. - (Optional)", "Job(s) - (Optional)", "Position(s) - (Optional)", "Cost Center(s) - (Optional)", "Application of Fund(s) - (Optional)", "Fund(s) - (Optional)", "Employee Pay Type(s) - (Optional)", "Employee Pay Area(s) - (Optional)", and "Exclude Employee Subgroup (Contractor, National Guard) G1;G5".

To the right of the summary list is a larger panel titled "Effective Date (Mandatory)". It contains two input fields. The "Start value" field contains "7/1/2012" and has a yellow box with the number "2" next to it. To its right is a calendar icon with a yellow box containing the number "4" next to it. A red arrow points from the "4" box to the calendar icon. The "End value" field contains "7/31/2012" and has a yellow box with the number "3" next to it. Another red arrow points from the "4" box to the "End value" field. At the bottom right of the window are "OK" and "Cancel" buttons.

Optional Prompts

Optional prompts are indicated with a green check mark (✓) and are not required. They are used to assist in further limiting the amount of data that is retrieved into the body of the report.

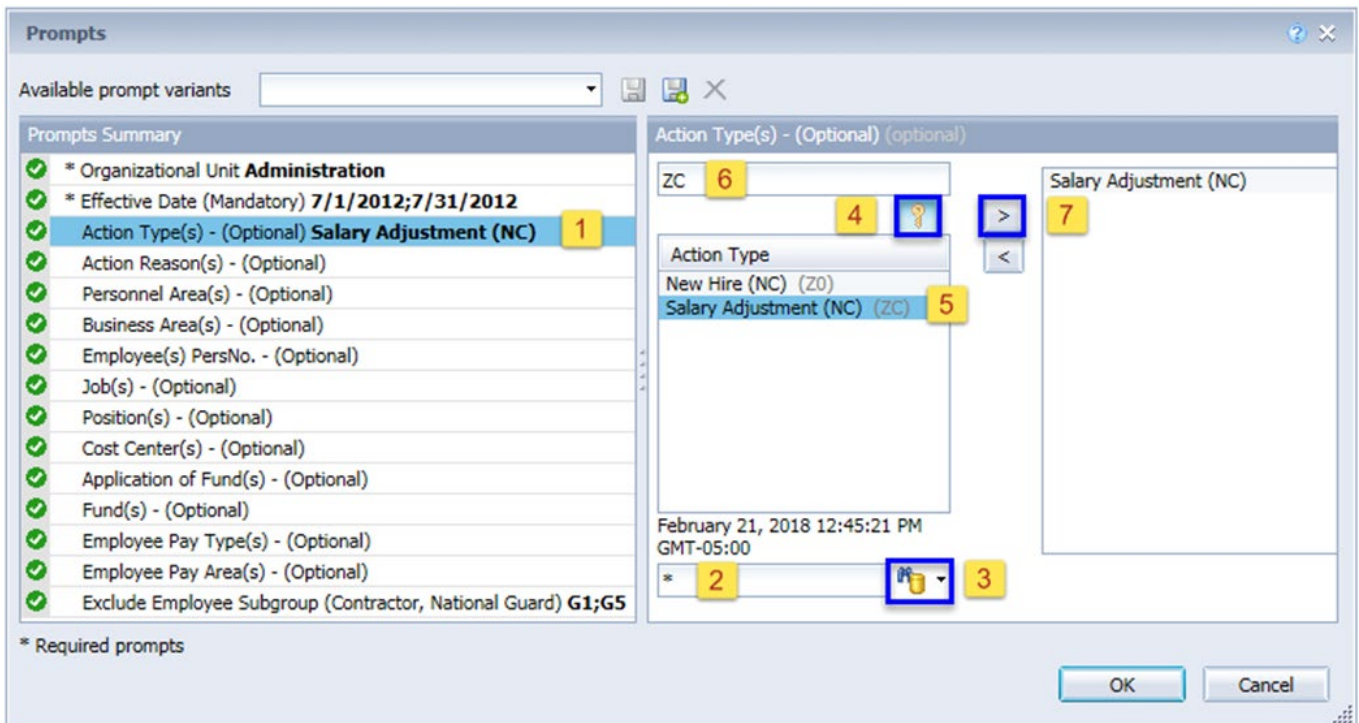
NOTE: Action Type and Action Reason are related data elements. Each Action Type will have a specific set of related Action Reasons.

For example, the ‘Promotion (Z1)’ action type has the following related action reasons:

- Z101 Promotion
- Z102 Promotion Inc-After Eff Date
- Z103 Acting Promotion

✓ **Action Type(s) - (Optional):** To select data for this prompt:

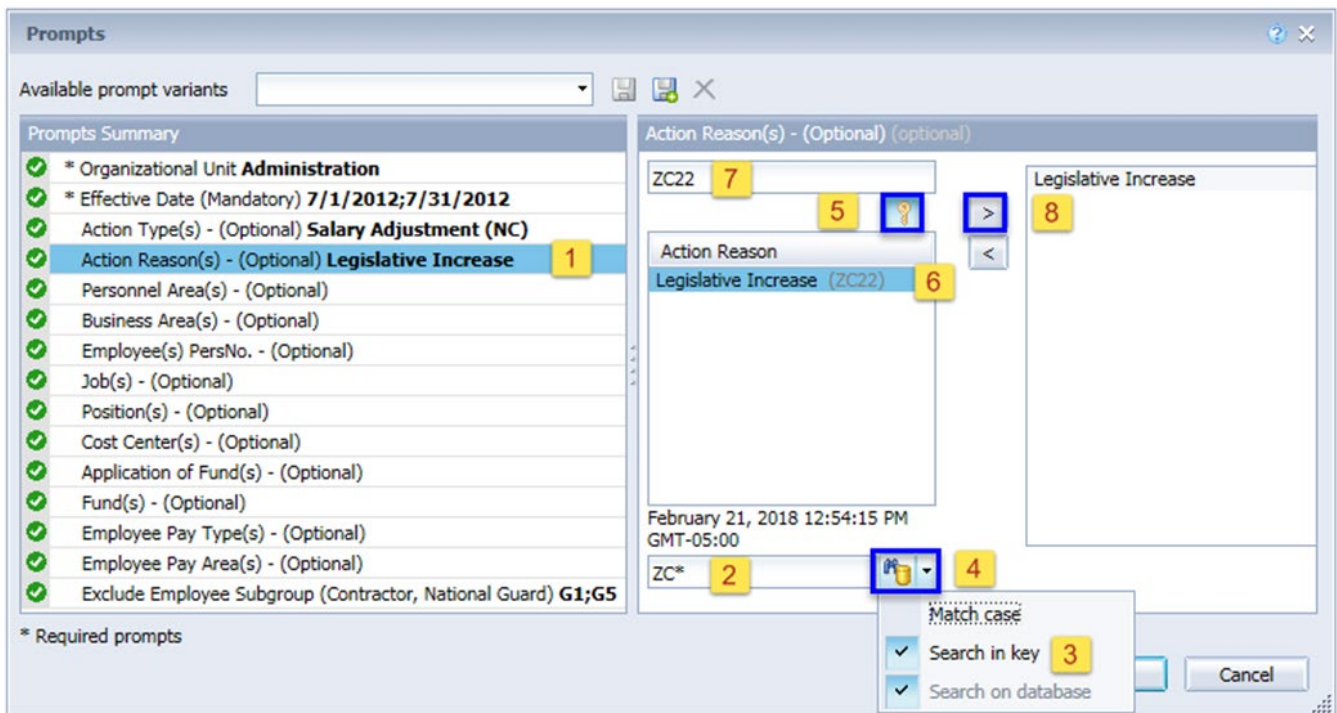
- Make sure the “Action Type(s) - (Optional)” prompt is selected (1).
- Enter a search text with an asterisk (*) in the search box to view the list of values for Action Type (2).
- Click the search icon (3).
- Click on the key icon (4) to see the key value for each Action Type.
- **NOTE:** The Action Type key will be helpful when selecting values for the Action Reason prompt below.
- Select the desired Action Type (5).
- **OR,** if the Action Type key or Action Type name is known, skip steps 2 through 5 and enter it directly in (6).
- Click the right arrow to add the Action Type to the selection box (7).



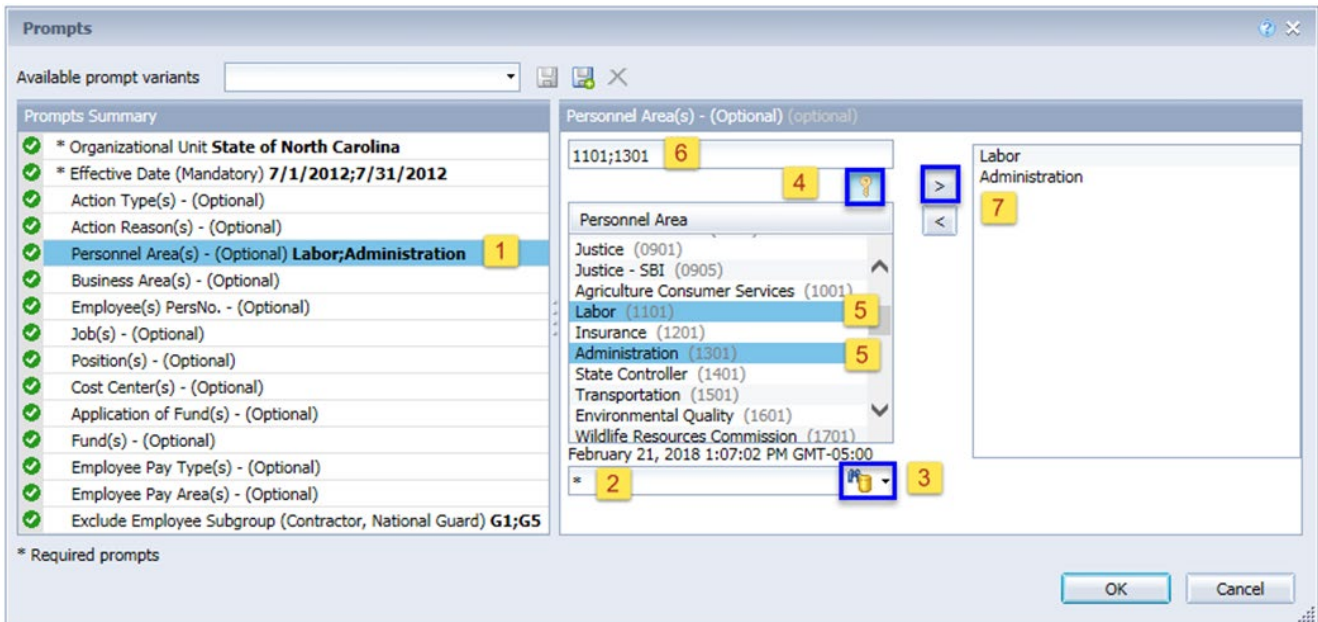
- ✓ **Action Reason(s) - (Optional):** To select data for this prompt:
 - Make sure the “Action Reason(s) - (Optional)” prompt is selected (1).
 - Enter a search text with an asterisk (*) in the search box to view the list of values for Action Type (2).
 - Click the search icon drop down arrow and select “Search in key” (3).
 - Click the search icon (4).
 - Click the key icon to see the key value for each Action Reason (5).
 - Select the desired Action Reason (6).
 - **OR**, if the Action Reason key or Action Reason name is known, skip steps 2 through 5 and enter it directly in (7).

NOTE: Since Action Reason is related to Action Type, when you are entering key values for Action Reason, the Action Type key & Action Reason key need to be entered together as one concatenated value. Example: Z301 (Action Type Z3 and Action Reason 01). If you are entering Text, then you can enter directly.

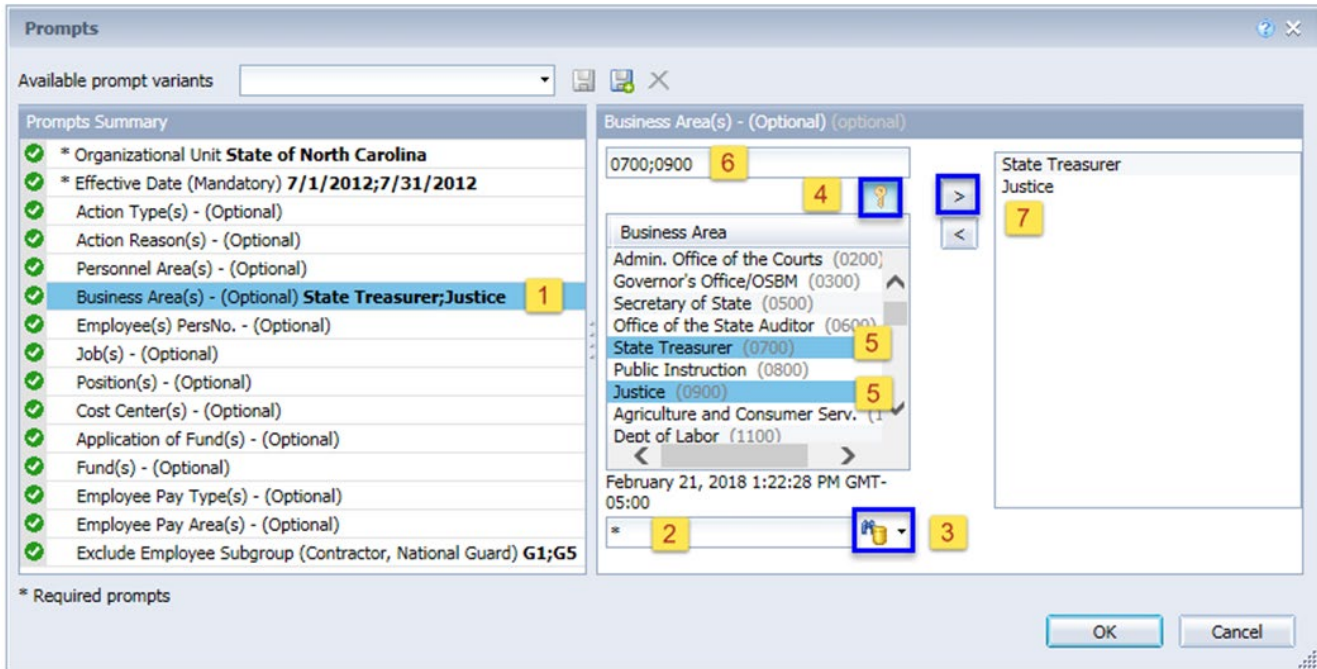
- Click the right arrow to add the Action Reason to the selection box (8).



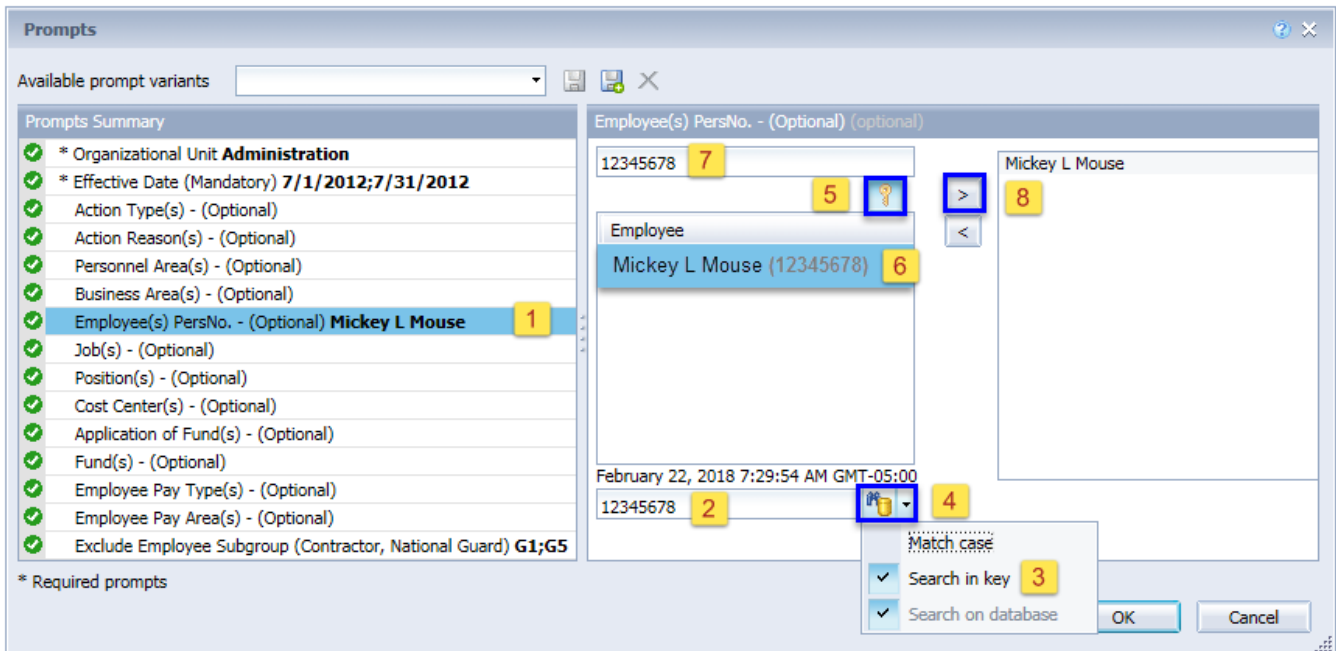
- ✓ **Personnel Area(s) - (Optional):** To select data for this prompt:
 - Make sure the “Personnel Area(s) - (Optional)” prompt is selected (1).
 - Enter a search text with an asterisk (*) in the search box to view the list of values for Personnel Area (2).
 - Click the search icon (3).
 - Click the key icon to see the key value for each Personnel Area (4).
 - Select the desired Personnel Area (5).
 - If you know the Personnel Area key or Personnel Area name, you can skip steps 2 through 5 and enter it directly in (6).
 - Click the right arrow to add the Personnel Area to the selection box (7).



- ✓ **Business Area(s) - (Optional):** To select data for this prompt:
 - Make sure the “Business Area(s) - (Optional)” prompt is selected (1).
 - Enter a search text with an asterisk (*) in the search box to view the list of values for Business Area (2).
 - Click the search icon (3).
 - Click the key icon to see the key value for each Business Area (4).
 - Select the desired Business Area (5).
 - If you know the Business Area key or Business Area name, you can skip steps 2 through 5 and enter it directly in (6).
 - Click the right arrow to add the Business Area to the selection box (7).



- ✓ **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 name (2).
 - Click on the search icon drop down arrow and select “Search in key” (3).
 - Click the search icon (4).
 - To see the employee number, click on the key icon (5).
 - Select the desired Employee (6).
 - If you do not need to verify the employee number, then you can skip steps 2 through 6 and enter it directly in (7).
 - Click on the right arrow to add the Employee to the selection box (8).



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

*John*Doe**

**Doe*

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

✓ **Job(s) - (Optional):** To select data for this prompt:

- Make sure the “Job(s) - (Optional)” prompt is selected (1).

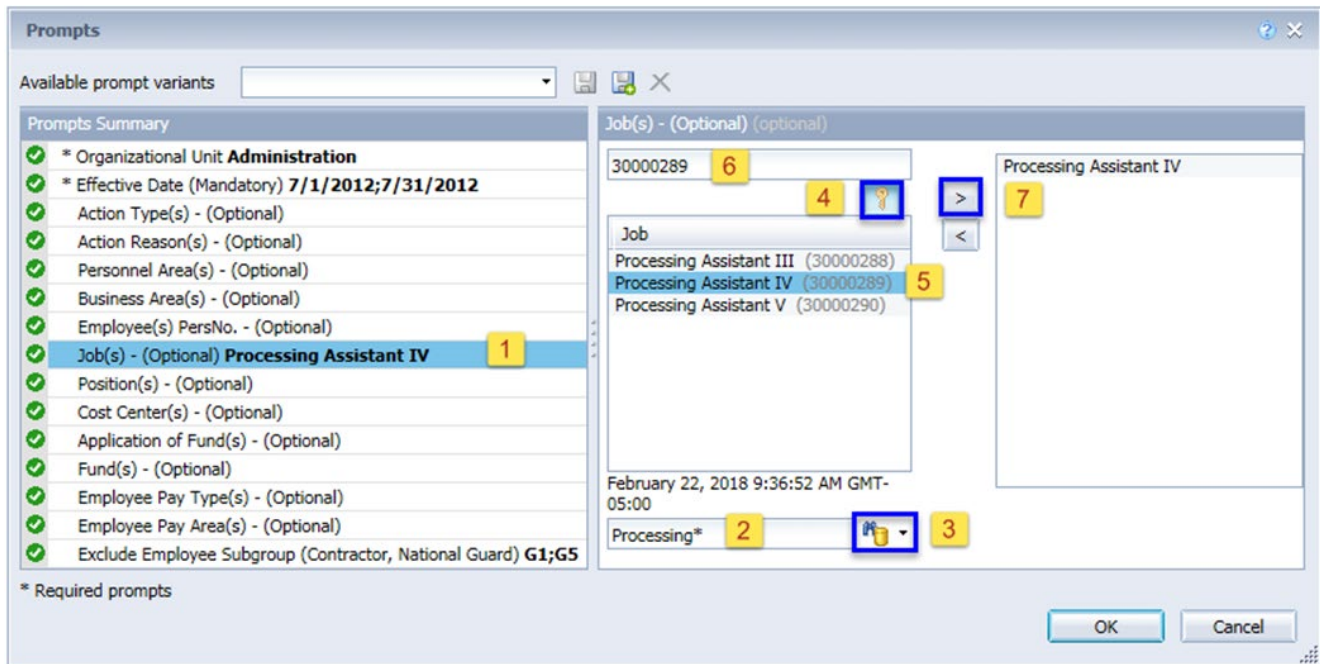
NOTE: There are many Jobs in the system, so it is best to do a wildcard search. Text searches are case sensitive and wildcard characters can be used anywhere in the search string, i.e., at the beginning, in the middle, at the end. See examples below.

Attorney

*Attorney**

*Attorney*General**

- Enter a search string using the wildcard *(2).
- Click the search icon (3).
- Click the key icon to see the key value for each Job (4).
- Select the desired Job (5).
- If you know the Job key or Job name, you can skip steps 2 through 5 and enter it directly in (6).
- Click the right arrow to add the Job to the selection box (7).



✓ **Position(s) - (Optional):** To select data for this prompt:

- Make sure the “Position(s) - (Optional)” prompt is selected (1).

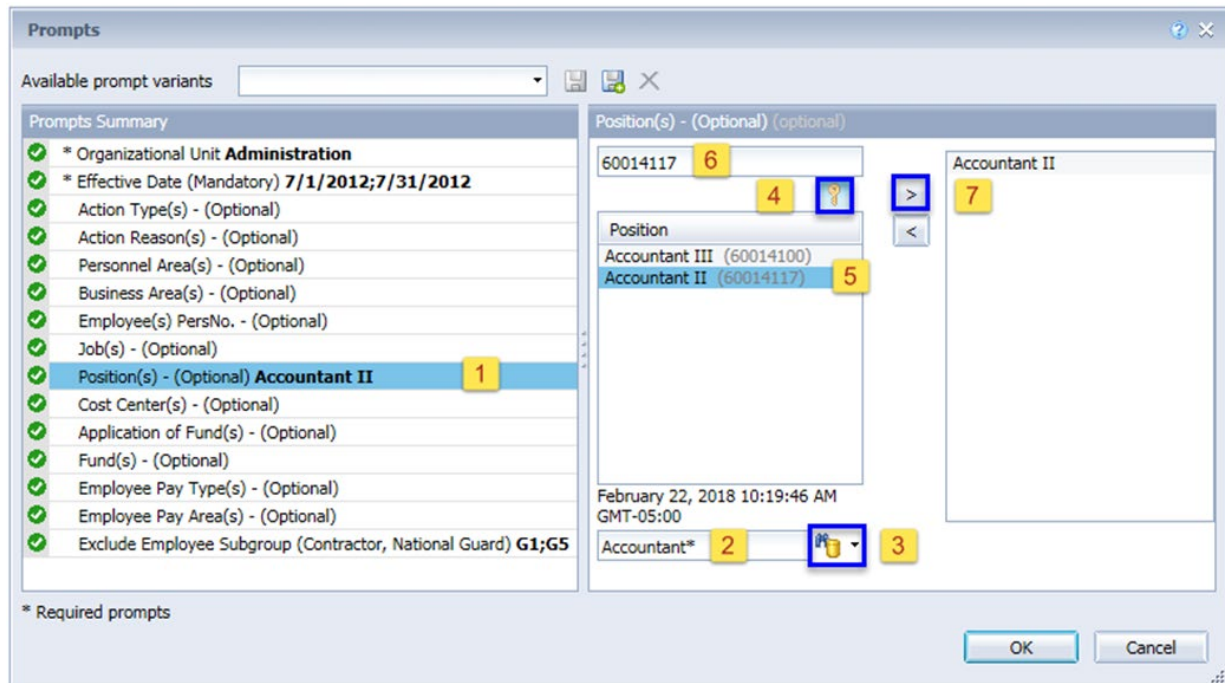
NOTE: There are many Positions in the system, so it is best to do a wildcard search. Text searches are case sensitive and wildcard characters can be used anywhere in the search string, i.e., at the beginning, in the middle, at the end. See examples below.

Attorney

Attorney*

Attorney*General*

- Enter a search string using the wildcard * (2).
- Click on the search icon (3).
- Click the key icon to see the key value for each Position (4).
- Select the desired Position (5).
- If you know the Position key or Position Name, then you can skip steps 2 through 5 and enter it directly in (6).
- Click on the right arrow to add the Position to the selection box (7).



✓ **Cost Center(s) (Optional):** To select data for this prompt:

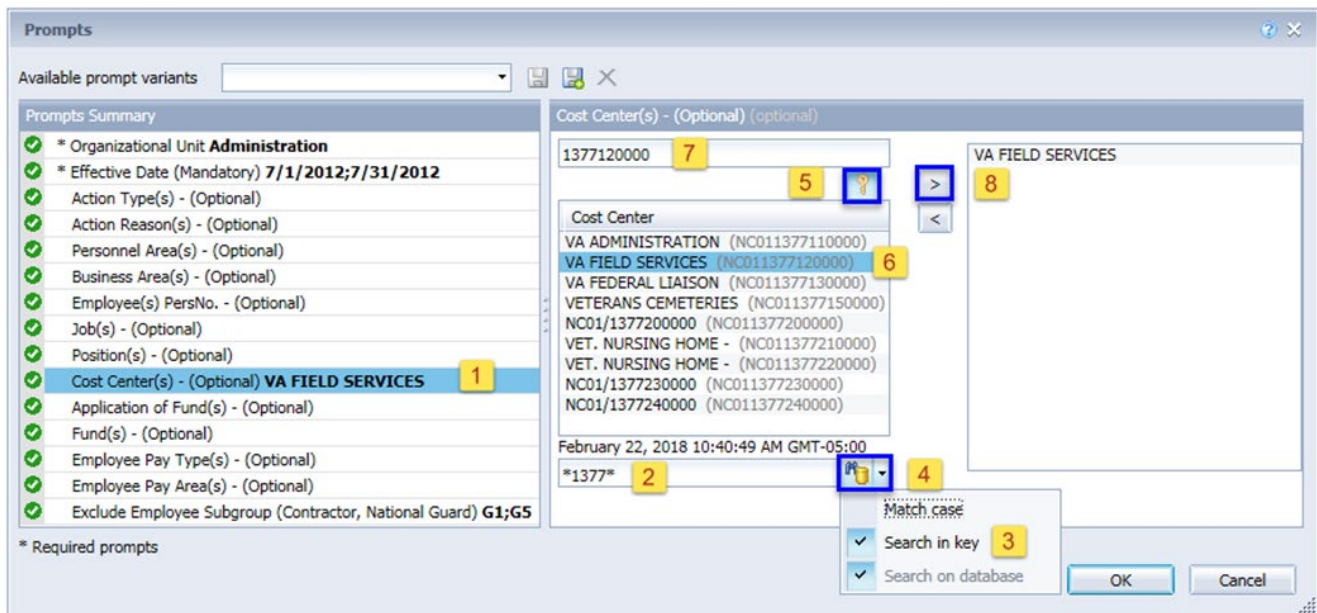
- Make sure the “Cost Center(s) (Optional)” prompt is selected (1).

NOTE: There are many Cost Centers in the system, so it is best to do a wildcard search.

- Type in a leading wildcard (*) character, then the first few digits of the Cost Center key followed by * (2).
- Click on the search icon drop down arrow and select “Search in key” (3).
- Click on the search icon (4).
- To see the key value for each Cost Center, click on the Key icon (5).
- Select the desired Cost Center (6).
- If you know the Cost Center key, then you can skip steps 2 through 6 and enter it directly in (7).

NOTE: The Cost Center key is displayed with the 4-character Controlling Area at the beginning, but you do not need to enter the ‘NC01’ Controlling Area when typing the Cost Center key directly.

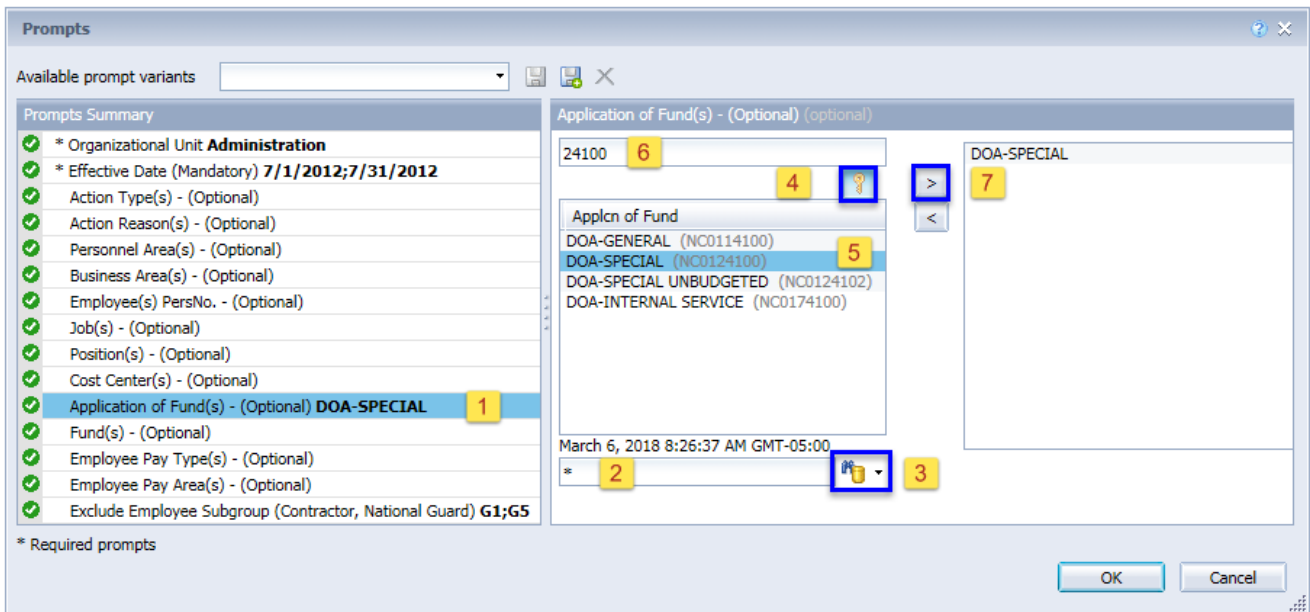
- Click on the right arrow to add the Cost Center to the selection box (8).



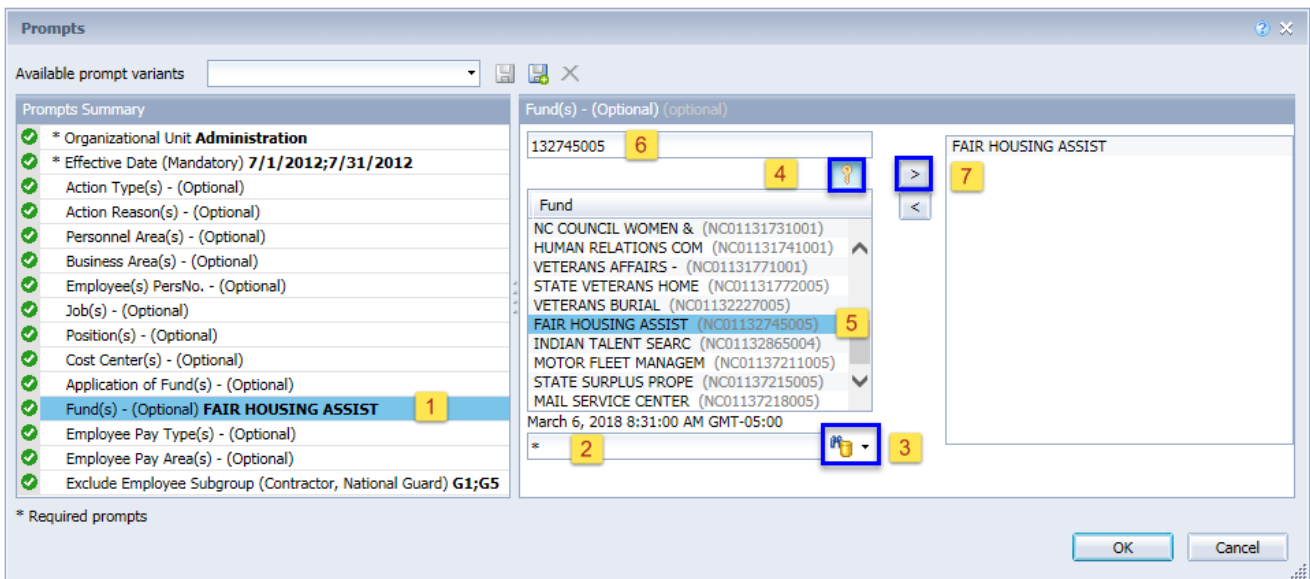
- ✓ **Application of Fund(s) - (Optional):** To select data for this prompt:
 - Make sure the “Application of Fund(s) - (Optional)” prompt is selected (1).
 - Enter a search text with an asterisk (*) in the search box to view the list of values for Application of Fund (2).
 - Click on the search icon (3).
 - Click the key icon to see the key value for each Application of Fund (4).
 - Select the desired Application of Fund (5).
 - If you know the Application of Fund key or Application of Fund name, you can skip steps 2 through 5 and enter it directly in (6).

NOTE: The Application of Fund key is displayed with the 4-character FM Area at the beginning, but you do not need enter the ‘NC01’ FM Area when typing the Application of Fund key directly.

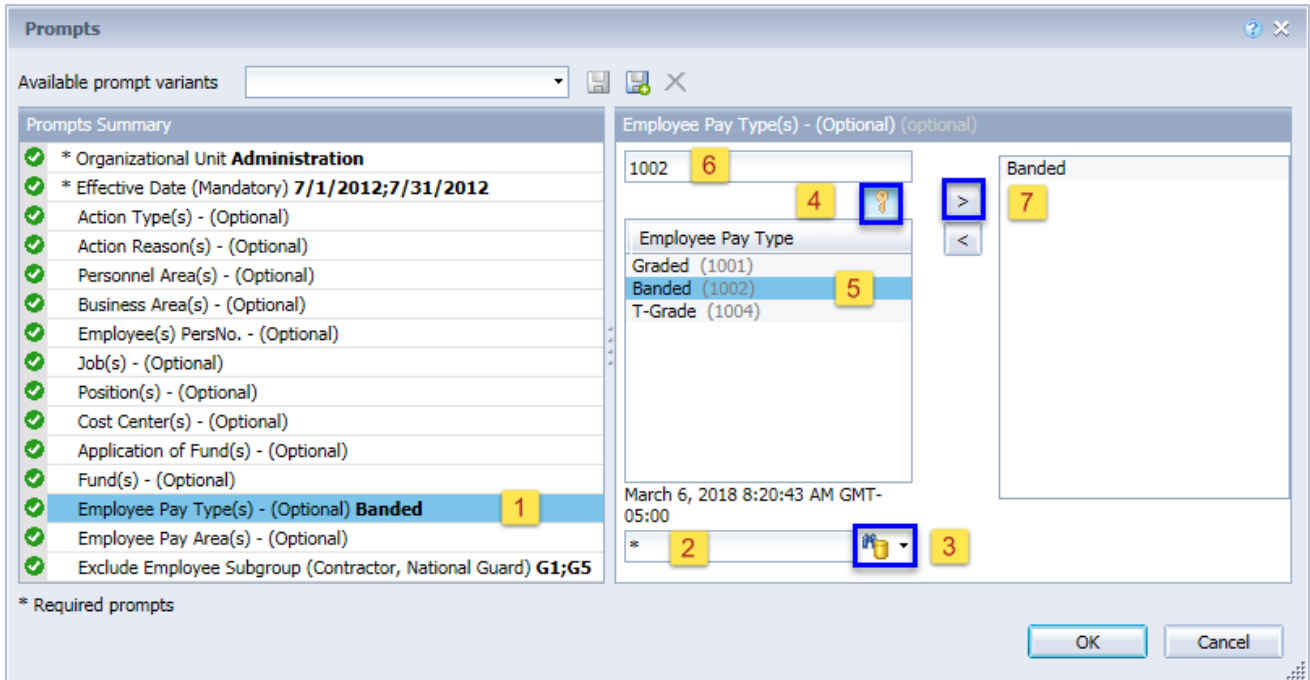
- Click the right arrow to add the Application of Fund to the selection box (7).



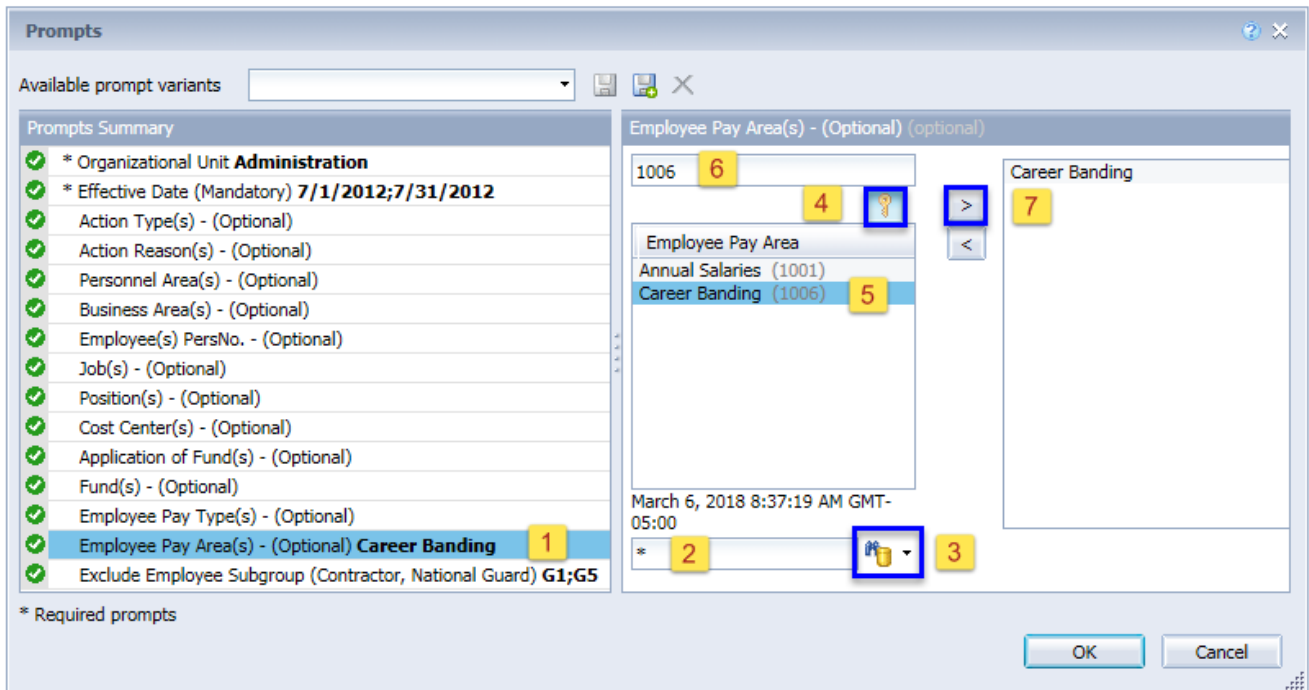
- ✓ **Fund(s) - (Optional):** To select data for this prompt:
 - Make sure the “Fund(s) - (Optional)” prompt is selected (1).
 - Enter a search text with an asterisk (*) in the search box to view the list of values for Fund (2).
 - Click the search icon (3).
 - Click the key icon to see the key value for each Fund (4).
 - Select the desired Fund (5).
 - If you know the Fund key or Fund name, you can skip steps 2 through 5 and enter it directly in (6).
- NOTE:** The Fund key is displayed with the 4-character FM Area at the beginning, but you do not need to enter the ‘NC01’ FM Area when typing the Fund key directly.
- Click the right arrow to add the Fund to the selection box (7).



- ✓ **Employee Pay Type(s) - (Optional):** To select data for this prompt:
 - Make sure the “Employee Pay Type(s) - (Optional)” prompt is selected (1).
 - Enter a search text with an asterisk (*) in the search box to view the list of values for Employee Pay Type (2).
 - Click the search icon (3).
 - Click the key icon to see the key value for each Employee Pay Type (4).
 - Select the desired Employee Pay Type (5).
 - If you know the Employee Pay Type key or Employee Pay Type name, you can skip steps 2 through 5 and enter it directly in (6).
 - Click the right arrow to add the Employee Pay Type to the selection box (7).



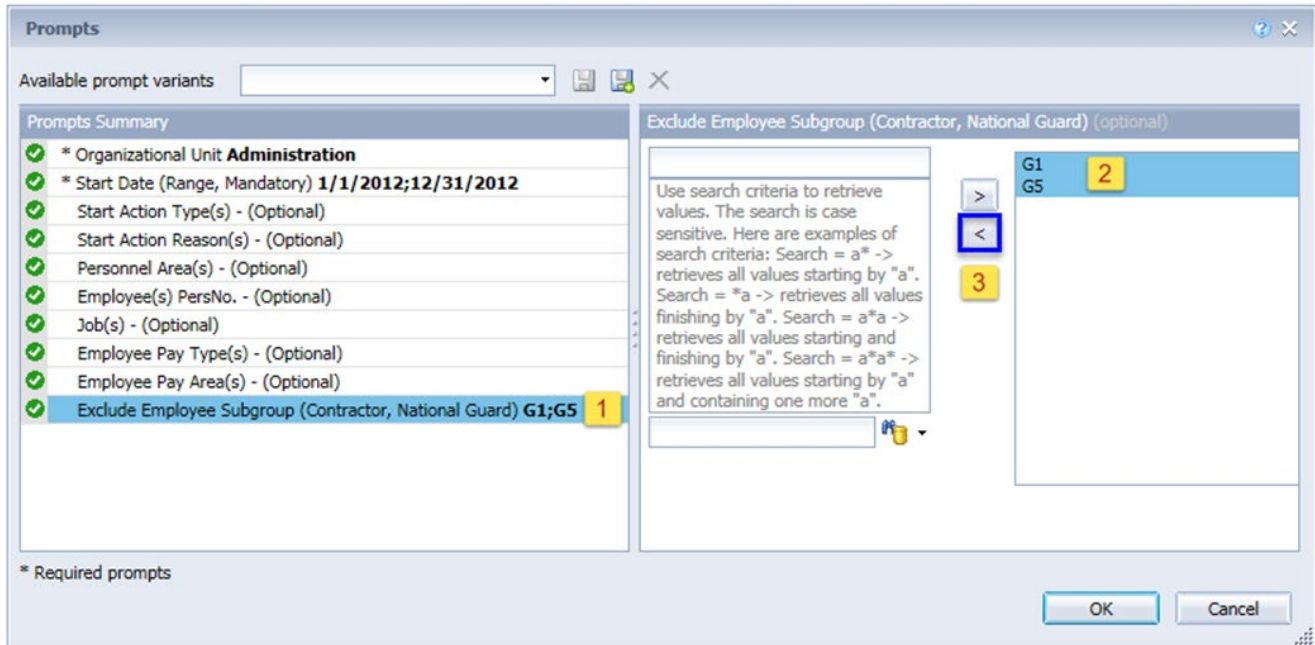
- ✓ **Employee Pay Area(s) - (Optional):** To select data for this prompt:
 - Make sure the “Employee Pay Area(s) - (Optional)” prompt is selected (1).
 - Enter a search text with an asterisk (*) in the search box to view the list of values for Employee Pay Area (2).
 - Click the search icon (3).
 - Click the key icon to see the key value for each Employee Pay Area (4).
 - Select the desired Employee Pay Area (5).
 - If you know the Employee Pay Area key or Employee Pay Area name, you can skip steps 2 through 5 and enter it directly in (6).
 - Click the right arrow to add the Employee Pay Area to the selection box (7).



Exclusion Prompts

Exclusion prompts are indicated with a green check mark (✓) also 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 included in the report.

- ✓ **Exclude Employee Subgroup (Contractor, National Guard) G1; G5** - To remove this exclusion:
 - Make sure the “Exclude Employee Subgroup (Contractor, National Guard)” prompt is selected (1).
 - Click one or more Employee Subgroup(s) to remove from the ‘Selected Value(s) box (2).
 - Click the left arrow icon to remove the desired Employee Subgroup(s) (3).



Report Description B0139 – Employee Salary Actions with Budget Detail Report

Initial Layout

The report lists all postings for the prompt values selected. Below is a sample of the initial layout rendered.

B0139: Employee Salary Actions with Budget Detail
Effective Date: 7/1/2012 - 7/31/2012

Personnel Area	Org Unit	Org Unit Desc	Employee	Employee's Name	Effective Date	Action Type	Action Type Desc	Action Reason	Action Reason Desc
Administration	23333333	General Counsel	12345678	MOUSE, MICKEY	7/1/2012	ZC	Legislative Increase	22	Legislative Increase
	24444444	Purchasing & Control	87654321	MOUSE, MINNIE	7/1/2012	ZC	Legislative Increase	22	Legislative Increase
Personnel Area - Administration									

Continued...

Job	Job Desc	Position	Position Desc	Annual Salary	Compa Ratio	Applcn of Fund	Fund	Funding Source	Cost Center
35555555	Chief Deputy	62222222	Attorney	119,416.00	1.15	12345	123456788	Appropriated	1234567890
36666666	State Purchase And Contract Liason	63333333	State Purchase And Contract Liason	110,493.00	1.17	12345	123456789	Appropriated	1234567891

Continued...

Budget Amt Valid From	Budget Amt Valid To	Fund %	Budgeted Amount	Difference Budget Amt & Annual Salary	PT FTE Positions	FT FTE Positions	Total FTE Positions	Shared Position?
7/1/2008	6/30/2014	50.00	47,292.50	-72,123.50		0.500	0.500	Y
7/1/2008	6/30/2014	100.00	100,776.00	-9,717.00		1.000	1.000	#

Available Objects

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

<ul style="list-style-type: none"> [-] B0139: Employee Salary Actions with Budget Detail <ul style="list-style-type: none"> [+] Action Reason [+] Action Type [+] Addl Center Ref [+] Agency Hire Date [+] Age Range [+] Applcn of Fund [+] Budget Amt Valid From [+] Budget Amt Valid To [+] Budget Funding Source (OSBM) [+] Business Area [+] Changed By [+] Controlling Area [+] Cost Center [+] Cost Center Category [+] Country [+] EEO Category [+] Effective Cal Mth/Yr [+] Effective Cal Yr [+] Effective Date [+] Effective Fiscal Period [+] Effective Fiscal Year [+] Employee [+] Employee's Name [+] Employee Group [+] Employee Pay Area [+] Employee Pay Group [+] Employee Pay Level [+] Employee Pay Type [+] Employee Subgroup [+] Employment Status [+] ESG CAP [+] Ethnic Origin [+] FCTR Cat [+] FCTR Ref [+] Financial Key [+] Flag [+] FM Area [+] Fund [+] Funding Source [+] Fund Type 	<ul style="list-style-type: none"> [+] Gender [+] Job [+] Job Branch [+] Job Family [+] Job Pay Area [+] Job Pay Group [+] Job Pay Level [+] Job Pay Type [+] Judicial Annv Date [+] Length of Serv. As of Date of Action [+] NCAS Account [+] NCFS Account [+] 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 [+] Next Increase Date [+] Order [+] Org Unit [+] Original Hire Date [+] Payroll Area [+] Personnel Area [+] Personnel Subarea [+] Pos County [+] Position [+] Position Chief [+] Pos Pay Area [+] Pos Pay Group [+] Pos Pay Level [+] Pos Pay Type [+] Prior Position [+] Processed Date [+] SAP GL Account 	<ul style="list-style-type: none"> [+] SFCTR Ref [+] Shared Position? [+] SOC Code [+] SOC State Subcat [+] State [+] Statutory Exempt Type [+] Supv Employee [+] Supv Position <ul style="list-style-type: none"> [+] Budget Amt per Emp [+] Emp RefSal Per Fund [+] Emp Salary per Fund [+] FTE Salary Per Fund [+] FT FTE Positions [+] Fund Pct Per Emp [+] Job RefSal Per Fund [+] Position FTE [+] PT FTE Positions [+] Variables <ul style="list-style-type: none"> [+] Prompt Response Action Reason [+] Prompt Response Action Type [+] Prompt Response Application of Fund [+] Prompt Response Business Area [+] Prompt Response Cost Center [+] Prompt Response Effective Date [+] Prompt Response Employee Pay Area [+] Prompt Response Employee Pay Type [+] Prompt Response Employee PersNo [+] Prompt Response Exclude Employee Subgroup [+] Prompt Response Fund [+] Prompt Response Job [+] Prompt Response Organizational Unit [+] Prompt Response Personnel Area [+] Prompt Response Position [+] DOT NCFS AMU [+] DOT NCFS Budget Fund <ul style="list-style-type: none"> [+] Compa Ratio [+] Difference Budget Amt & Annual Salary [+] Emp or Job Ref Salary [+] References
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Special Report Considerations/Features

- Because some positions may be split-funded, multiple lines may show for the same employee action with each line breaking out the specific fund split.
- When positions are shared across multiple employees, the Fund %, Budgeted Amount, and Position FTE measures are all divided by the number of employees sharing the position.

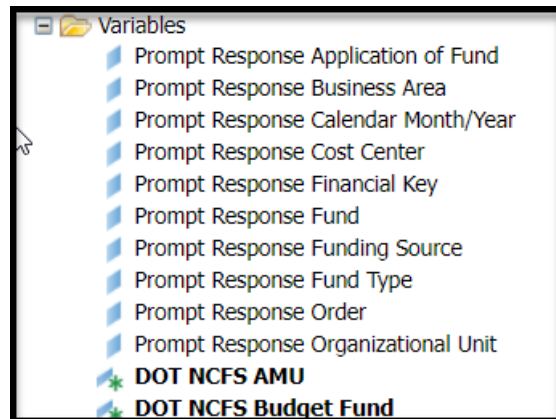
***NOTE:** The Fund %, Budgeted Amount, and Position FTE measures may not add up to the original amount if not all employees sharing the same position appear on the report. The Shared Position? data element will indicate when an employee is in a shared position.*

- The types of actions selected for this report are based on actions defined by the Functional Team that affect salary. The entries are stored in table ZPA_ACTIONS. The table identifies 12 specific salary affecting actions.

Action Type	Action Description
Z0	New Hire (NC)
Z1	Promotion (NC)
Z2	Reinstatement/Reemployment (NC)
Z7	Non-Beacon to Beacon (NC)
Z8	Transfer (NC)
Z9	Appointment Change (NC)
ZA	Reallocation (NC)
ZB	Demotion (NC)
ZC	Salary Adjustment (NC)
ZD	Cancel Salary Adjustment (NC)
ZE	Range Revision (NC)
ZH	Career Progression (NC)

- There are 100+ combinations of these 12 actions paired with unique action reasons that are deemed as salary affecting. The complete table can be viewed in the spreadsheet **B0139 Salary Actions List** located under sub-folder ‘_Help/Reference Documents’ of the primary ‘HR-Payroll’ public folder.
- When there are multiple salary changing actions with the same Effective Date, the Infotype 0008 change history table is reviewed to determine which salary change went with which action. However, if for some reason the number of actions does not equal the number of IT0008 change records for that same date, then we are unable to determine which action caused what salary change so the most recent IT0008 salary is shown for all actions on that day. When this scenario happens, the action records will be flagged, and the “Flag” data element (from Available Objects) will show an ‘X’ value to signify this.
- **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 and 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 03/14/2018**
 - Original implementation of report.
- **Effective 12/15/2022**
 - Updated format added alt text. L.Lee
- **Effective 12/15/2022**
 - Add “Flag” data element added to Available Objects.
 - Removed Disability Code from Employee (expanded attributes) in Available Objects.
- **Effective 10/09/2023**
 - NCFS Updates