



POSITION HISTORY

REPORT DESCRIPTION BP001 | WEB INTELLIGENCE



The purpose of this report description is to explain the purpose of and how to generate the Position History report.

REPORT DESCRIPTION

This report provides a consolidated historical view of converted PMIS action and Integrated HR-Payroll System action history for all the position, employee, and fund related actions of a single specified position.

REPORT LOCATION

OM: Position Data

REPORT USES

Agencies will use this report for monitoring purposes to report the position actions historically processed for a single position.

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How to generate this report

This report is generated after selecting values for the mandatory prompts. All mandatory prompts must have values selected before the Run Icon can be used to generate the report. Mandatory prompts can be identified as mandatory by the exclamation mark inside of the yellow-orange triangle, the square with the checkmark, or the display of (Mandatory). Detailed instructions for interaction with each prompt can be found on the OSC website at https://www.osc.nc.gov/documents/files/web-intelligence-prompts.

The Mandatory prompts for this report are:

- Organizational Unit
- Position Number (Single Value) - (Mandatory)

Initial Layout

Below is a sample of the initial layout rendered.

The screenshot shows a web application interface for the report 'BP001: Position History'. The interface includes a navigation bar with a home icon, a search bar, and a 'KB' button. Below the navigation bar is a toolbar with icons for file operations, query, analyze, and display. The main content area displays the report title 'BP001: Position History' and a sub-header '60091139 - State HRIS HR Ops Analyst'. The data is presented in a table with the following columns: Valid From, Action Src, Action Type/Reason, Action Desc, Employee, Employee Full Name, Org Unit, Org Unit Desc, Employee Salary, and Budget Amount. The table contains six rows of data, all for 'Test User 1' at 'OSC BEACON BEST SHARED SVCS HR/Benefits'.

Valid From	Action Src	Action Type/Reason	Action Desc	Employee	Employee Full Name	Org Unit	Org Unit Desc	Employee Salary	Budget Amount
7/23/24	Emp	Z217	Return from Parental	1111111	Test User 1	20010655	OSC BEACON BEST SHARED SVCS HR/Benefits	56,586.00	56,586.00
7/1/24	Emp	Z301	FMLA	1111111	Test User 1	20010655	OSC BEACON BEST SHARED SVCS HR/Benefits	56,586.00	56,586.00
7/1/24	Emp	ZC22	Legislative Increase	1111111	Test User 1	20010655	OSC BEACON BEST SHARED SVCS HR/Benefits	56,586.00	56,586.00
7/1/24	Fund	112	Legislative Increase for Position	1111111	Test User 1	20010655	OSC BEACON BEST SHARED SVCS HR/Benefits	56,586.00	56,586.00
7/1/24	Pos	112	Legislative Increase for Position	1111111	Test User 1	20010655	OSC BEACON BEST SHARED SVCS HR/Benefits	56,586.00	56,586.00
5/28/24	Emp	Z301	FMLA	1111111	Test User 1	20010655	OSC BEACON BEST SHARED SVCS HR/Benefits	54,938.00	54,938.00

Available Objects

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

Dimensions:

- Action
- Action Src
- Changed By
- Changed On
- EE Employee Group
- EE Employee Subgroup
- EE GR/LVL
- Employee
- Employee Group
- Employee Subgroup
- Job
- NCAS Account
- Organizational Unit
- Personnel Area
- Personnel Subarea
- PMIS Appt Type
- PMIS From/To Position #
- PMIS Position #
- PMIS Remark 1
- PMIS Remark 2
- PMIS Remark 3
- Pos Country
- Pos County
- Pos GR/LVL
- Pos State
- Position
- SAP GL Account
- Sequence Number
- SOC Code
- Source System
- Supervisor Name
- Supervisor Position
- Valid From
- Valid To

Measures:

- Budget Amt Per Fund
- Emp Salary
- Emp Salary/Hrly Rate Per Fund
- Total Committed Amt

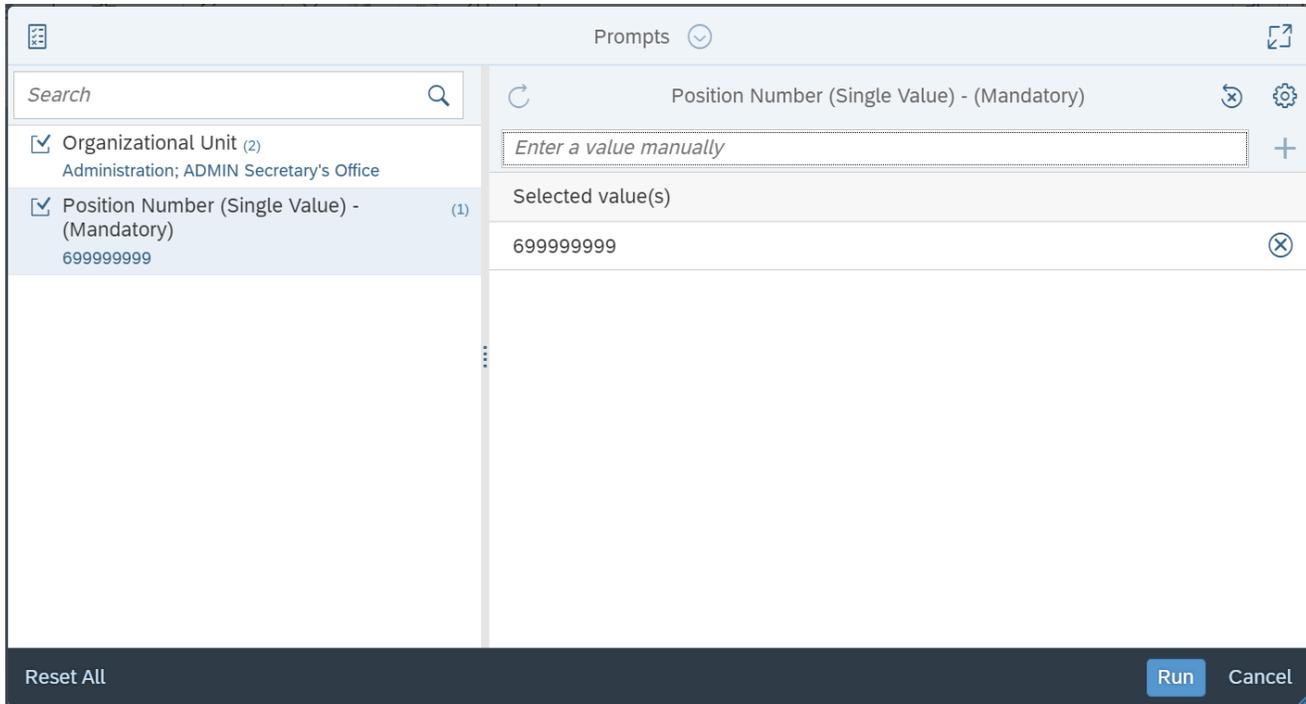
Variables:

- Prompt Response Organizational Unit
- Prompt Response Position Number
- Budget Amount
- Employee Salary

- > Action
 - > Action Src
 - > **Changed By**
 - Changed On**
 - > **EE Employee Group**
 - > **EE Employee Subgroup**
 - > **EE GR/LVL**
 - > Employee
 - > **Employee Group**
 - > **Employee Subgroup**
 - > **Job**
 - > **NCAS Account**
 - > Organizational Unit
 - > **Personnel Area**
 - > **Personnel Subarea**
 - > **PMIS Appt Type**
 - > **PMIS From/To Position #**
 - > **PMIS Position #**
 - > **PMIS Remark 1**
 - > **PMIS Remark 2**
 - > **PMIS Remark 3**
 - > **Pos Country**
 - > **Pos County**
 - > **Pos GR/LVL**
 - > **Pos State**
 - > Position
 - > **SAP GL Account**
 - > **Sequence Number**
 - > **SOC Code**
 - > **Source System**
 - > **Supervisor Name**
 - > **Supervisor Position**
 - Valid From
 - Valid To**
 - > Measures
 - Budget Amt Per Fund
 - Emp Salary
 - Emp Salary/Hrly Rate Per Fund
 - Total Committed Amt
 - > Variables
 - Prompt Response Organizational Unit
 - Prompt Response Position Number
 - Budget Amount
 - Employee Salary

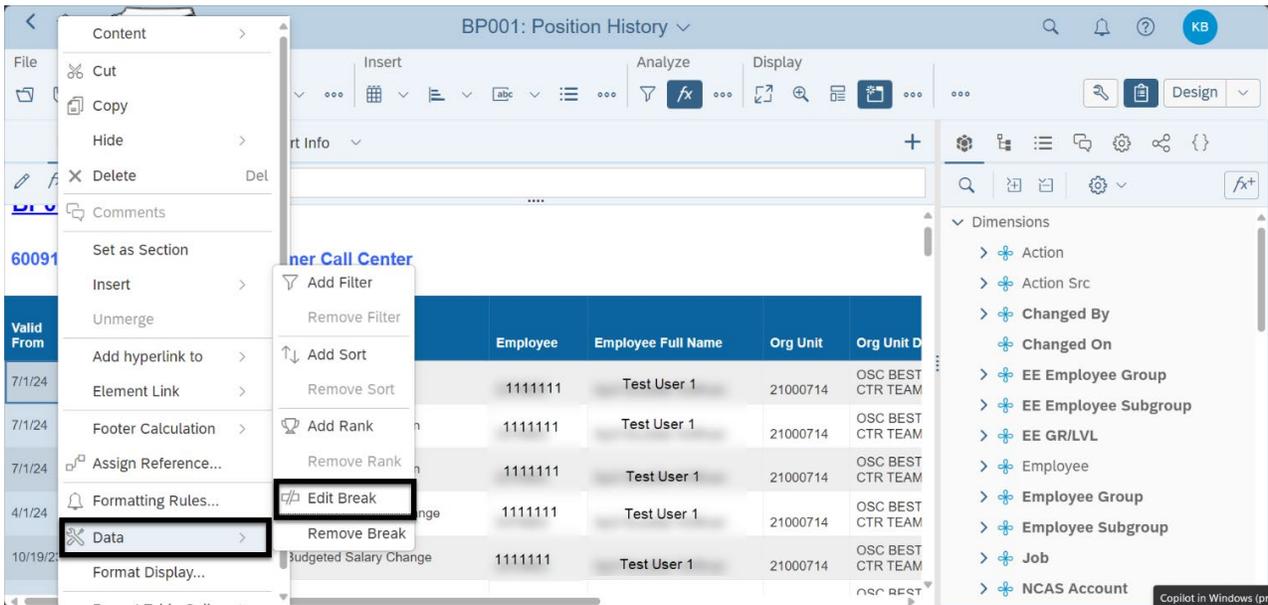
Special Report Considerations/Features

- SAP Employee Conversion Actions (ZZ01) are excluded. SAP Position Assignment Actions (ZY01) are excluded.
- Entering a position number that does not exist will result in the following error.

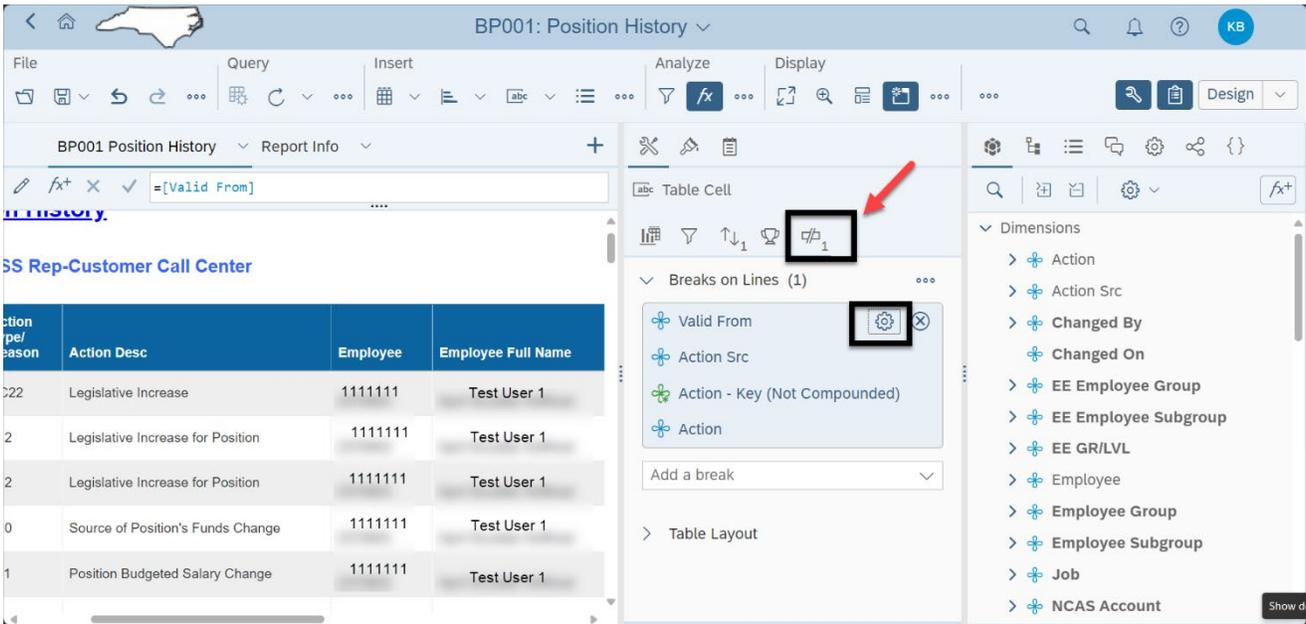


- Data for this report is reloaded daily.
- **Employee Salary** in report layout represents hourly rate for temporary employees and annual salary for all others.
- **Budget Amount** in report layout represents the position's full budget amount. If there are multiple employees in the position, the Budget Amount would still reflect the position's full budget and is not split based on the number of employees in the position.
- **Field/Home Based** indicator is available from Position attributes (expanded list) in Available Objects.

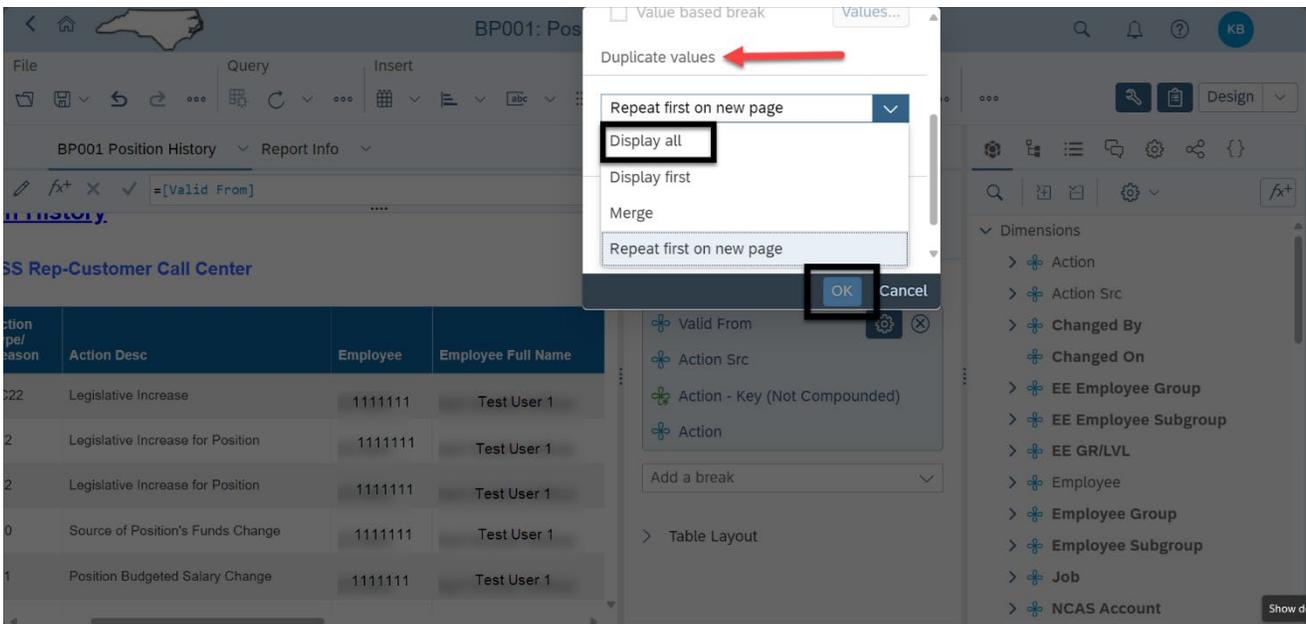
- The report has a break defined to help spot cases where there are multiple employees in a position. The break is designed to suppress duplicate row values. When exporting data to Excel, follow the instructions below to repeat the values in each row of the report. Once the report is set up to repeat the values, you can then export the report to Excel and the values will be repeated on the spreadsheet as well.
 1. Run the BP001 report for the desired position.
 2. Once in the report, select Design from the display drop down menu.
 3. Right click on the desired row
 4. Select Data
 5. Select Edit Break



6. Click on “Display the break panel” icon.
7. Click on the Settings icon next to “Valid From” in the Breaks on Lines panel.



8. Scroll down to Duplicate values and change drop down option from “Repeat first on new page” to “Display All” and click OK.



9. Repeat steps (7) and (8) for each of the objects listed under Breaks on Lines panel, so all values will repeat.
10. All values will be displayed in the report. When the report is exported to Excel, the duplicate values are displayed.

CHANGE RECORD

- 12/3/15 – Initial version
- 4/7/16 – Updated to add Job Min, Job Max, and Job Reference Salary to Job attributes.
- 2/21/19 – Re-designed for better performance when a non-existent position number is accidentally used on the prompt input screen; removed PMIS Position # from initial report layout; added Org Unit Number and Org Unit Name to report layout; added hyperlink to this report description document on the main tab.
- 8/23/21 – Updated format and assigned reference number – Claire Ennis
- 9/2/21 – Added **Field/Home Based** indicator to Position attributes (expanded list) in Available Objects.
- 10/07/2024 – Update to Business Objects 4.3 K. Bridges