Position Management: Reports

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Reports

Use the Table of Contents to access a page.

PMIS Reports

Position Management > Reports > PMIS Reports

This page allows you to select the report you want to generate.

Select a report:

All available report names are displayed on the left side of the page. The list of available reports remains displayed on the page even after you select a report name. This allows you to select another report within the selected reports menu without exiting the report page.

❏ Click a report to select it. The parameters for the selected report are displayed on the right side of the page.

❏ Type or select the report options. **Parameters in bold are required.**

❏ Use the buttons located at the top of the page to generate the report. If the button feature does not apply to the selected report, it is disabled. For example, a certain report may not be available in the CSV format, so the **CSV** button will be disabled when that report is selected.

- **Preview** - Click to generate the HTML view of the report.
- **PDF** - Click to generate a PDF file of the report.
- **CSV** - Click to generate a CSV file of the report.
- **Clear Options** - Click to clear data from all parameter fields.

Review, save and/or print the report.

Sort and filter:

Some reports may or may not provide the sort and/or filter option.

Sort	Sort report data: You can sort data to make it easier to review or find records in the reports. Not all reports allow this option. From the report window, click **Sort/Filter** to open the Sort/Filter window. By default, the **Sort Criteria** section is expanded. If not, click **Sort Criteria**.	
	(Left grid) Columns Available for Sorting	Select the columns by which you want to sort, the columns are highlighted blue. Click ▶ to move the selected columns to the right side of under **Sort Columns**. Continue moving columns to the right grid as needed.
	(Right grid) Sort Columns	You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location. In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order. To remove a column from the sort, select the column, and then click to move it back to the left grid.
	Click **OK** to apply the selected sort criteria to the report. Click **Cancel** to close the window without re-sorting.	

Filter	Filter report data:
	When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.
	From the report window, click **Sort/Filter** to open the **Sort/Filter** window. By default, the **Sort Criteria** section is expanded. Click **Filter Criteria** to expand the **Filter Criteria** section.
	If the report does not allow sorting, the **Filter** button is displayed instead of the **Sort/Filter** button, and sort criterion fields are not available.
	Click **Add Criterion** to add new filter criteria. A blank row is displayed in the grid.

Field	Description
Column	Select a column by which to filter the data. The drop down lists the columns that appear on the report.
Operator	Select an operator. = Equals ≠ Not equals ‹ Less than ≤ Less than or equal to › Greater than ≥ Greater than or equal to
Value	Type the value by which you want to filter. For example, if you selected a date in the **Column** field, type a date to view only data for a specific date.

Other functions and features:

Add Criterion	Add another row.
	Select the logical connector (*AND* or *OR*) in the **Logical** field. Continue adding rows as needed.
	Using the *AND* operator limits search results, because the program looks only for records that contain both criterion. Using the *OR* operator expands search results, because the program looks for records that contain either one criterion or the other, or both.
Delete Selected	Delete selected row.
	Select the row, and then click the **Delete Selected** button. The row is deleted from the filter criteria.

Click OK to apply the selected filter criteria to the report.

Click Cancel to close the dialog box without applying a filter.

Reset	Reset report data.
	Click to restore the report to the original view, removing all sorting and filtering that has been applied.

Reset	Reset report data:
	Click to restore the report to the original view, removing all sorting and filtering that has been applied.

HRS8055 - Acct Code Comparison - PMIS vs Payroll

Position Management > Reports > PMIS Reports > Acct Code Comparison - PMIS vs Payroll

The report allows you to compare the distribution accounts in Position Management with those in Payroll. The report is sorted in campus order with the option to view the exceptions.

Parameter	Parameter Description
Sort by Employee Name (E), Campus (C), Position Number (P)	E - Sort the report by employee name. C - Sort the report by campus number. P - Sort the report by position number. This is a required field.
Exceptions Only? (Y/N)	Y - Include only exceptions on the report. N - Include all accounts on the report. This is a required field.
Select Campus(es) or blank for All	Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click ⋮ to search for campus ID numbers. Otherwise, leave blank to use all campus ID numbers.
Select Frequency(ies), blank for All	Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click ⋮ to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies.
Enter the Variance Amount for Pay Types 1 and 2	Type the variance amount for pay types 1 and 2.
Enter the Variance Amount for Pay Type 3	Type the variance amount for pay type 3.

Generate the report.

HRS8051 - CIP Transaction Report

Position Management > Reports > PMIS Reports > CIP Transaction Report

The report provides a list of changes that were made to the position management records. The report is based on the selected processing status; it is sorted by payroll frequency, employee name, position status, and effective date.

Parameter	Parameter Description
Sort by Employee Name (E), Position Number (P)	E - Sort the report by employee name. P - Sort the report by position number. This is a required field.
Select Detail (D) or Listing (L)	D - Print the detailed information on the report. L - Print a listing of information on the report. This is a required field.
Select Frequency(ies), blank for All	Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click ⋮ to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies.
Select CIP Status Accepted (A), Pending (P), Rejected (R), or blank for All	A - Print only accepted position statuses on the report. P - Print only pending position statuses on the report. S - Print only rejected position statuses on the report. Blank - Print all changes in positions on the report
From Effective Date (MMDDYYYY), or blank for ALL	Type the starting effective date in the MMDDYYYY format, or leave blank to use all from dates.
To Effective Date (MMDDYYYY), or blank for ALL	Type the ending effective date in the MMDDYYYY format, or leave blank to use all to dates.

Generate the report.

HRS8057 - CYR vs Forecast Positions Comparison

Position Management > Reports > PMIS Reports > CYR vs Forecast Positions Comparison

The report allows you to view all current Position Management positions that have not been updated from forecast.

Parameter	Parameter Description
Enter School Yr or blank to use PMIS Option Curr Yr	Type a school year in YYYY format, or leave blank to use the **Current Year** field as set on the District Administration > Options > PMIS District Options page.

Generate the report.

HRS8056 - CYR vs Forecast Positions Exception Rpt

Position Management > Reports > PMIS Reports > CYR vs Forecast Positions Exception Rpt

The report includes a list of missing forecast records in comparison to the current Position Management records. There are no report parameters.

HRS8058 - Forecast Accounts to Budget Comparison

Position Management > Reports > PMIS Reports > Forecast Accounts to Budget Comparison

The report allows you to view each distribution account in forecast with the forecast salary amount and the Budget salary amount.

Parameter	Parameter Description
Print All Accounts (A) or Missing Accounts Only (M)	A - Include all accounts on the report. M - Include only missing accounts on the report. This is a required field.

Generate the report.

HRS8053 - Midpoint Salaries Exception Report

Position Management > Reports > PMIS Reports > Midpoint Salaries Exception Report

This report provides a list of positions that have salary rates that are not within the minimum and maximum salary ranges.

Parameter	Parameter Description
Sort by Employee Name (E), Campus (C), Position Number (P)	E - Sort the report by employee name. C - Sort the report by campus number. P - Sort the report by position number. This is a required field.
Select Campus(es) or blank for All	Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click ⋮ to search for campus ID numbers. Otherwise, leave blank to use all campus ID numbers.
Select Frequency(ies), blank for All	Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click ⋮ to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies.
Select Midpoint Table ID(s), blank for All	Type a specific midpoint table ID. Otherwise, leave blank to use all midpoint table IDs.
Select Below Minimum (B), Above Maximum (A), or blank for both	B - Print only positions that have salary rates below the minimum salary ranges. A - Print only positions that have salary rates above the maximum salary ranges. Blank - Print all positions that have salary rates below the minimum and above the maximum salary ranges.

Generate the report.

HRS8054 - PMIS/Payroll Discrepancy Report

Position Management > Reports > PMIS Reports > PMIS/Payroll Discrepancy Report

The report allows you to print a list of all positions that do not have payroll records or a list of payroll records that do not have position management records.

Parameter	Parameter Description
Sort by Employee Name (E), Campus (C), Position Number (P)	E - Sort the report by employee name. C - Sort the report by campus number. P - Sort the report by position number. This is a required field.
Compare data at Employee Level (E) or Job Level (J)	E - Print discrepancies by employee level (e.g., employee is assigned to a position but is not active in the position frequency, employee is assigned to a position but does not have payroll records in the position frequency, employee is active in pay frequency for a pay type 1, 2, or 3 job but does not have a position assigned when exclude substitutes is set to Y, or employee is active in a pay frequency for a pay type 1, 2, 3, or 4 job but does not have a position assigned when exclude substitutes is set to N). J - Print discrepancies data by job level (if any of the above scenarios exist and the job code for the position does not match any of the job codes in the employee's job master, or if the position type is a supplement, the employee has extra duty codes that do not exist in the employee's extra duty records). This is a required field.
Exclude Substitutes? (Y/N)	Y - Do not include substitutes in the report. N - Include substitutes on the report. This is a required field.
Select Campus(es) or blank for All	Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click ⋮ to search for campus ID numbers. Otherwise, leave blank to use all campus ID numbers.
Select Frequency(ies), blank for All	Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click ⋮ to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies.
Select Position Type Primary (P), Supplement (S), or blank for All	P - Print only the primary position types on the report. S - Print only the supplement position types on the report. Blank - Print both the primary and supplement position types on the report.

Generate the report.

HRS8050 - Position Listing by Campus

Position Management > Reports > PMIS Reports > Position Listing by Campus

The report provides a list of all positions within a campus. The report is sorted by campus number and includes each job position along with a position number, billet number, description, employee number, employee name, percentage of day worked, and pay frequency.

Parameter	Parameter Description
Sort by Employee Name (E), Position Number (P)	E - Sort the report by employee name. P - Sort the report by position number. This is a required field.
Sort Vacant Position Last?	Y - Sort the vacant positions last on the report. N - Do not sort the vacant positions last on the report. This is a required field.
Include Proposed Position in Report?	Y - Include proposed positions on the report. N - Do not include proposed positions on the report. This is a required field.
Include Billet 00000 Positions in Report? (Y/N)	Y - Include positions with billet number 0000 on the report. N - Do not include positions with billet number 0000 on the report. This is a required field.
Select Campus(es) or blank for All	Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click ⋮ to search for campus ID numbers. Otherwise, leave blank to use all campus ID numbers.
Select Frequency(ies), blank for All	Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click ⋮ to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies.
Select Position Type Primary (P), Supplement (S) or blank for All	P - Print only primary position types on the report. S - Print only supplement position types on the report. Blank - Print both primary and supplement position types on the report
Select Position(s) blank for All	Type a specific position. Otherwise, leave blank to use all positions.

Generate the report.

HRS8052 - Positions with Attached Supplements

Position Management > Reports > PMIS Reports > Positions with Attached Supplements

The report provides a list of all positions that have an attached supplement position or a list of all supplement positions that have a position attached. The report only displays the positions and supplements if they are connected to one another.

Parameter	Parameter Description
Select Position with Supplements (P) or Supplement with Position (S)	P - Print the positions with supplements on the report. S - Print the supplements with positions on the report. This is a required field.
Sort by Employee Name (E), Position Number (P)	E - Sort the report by employee name. P - Sort the report by position number. This is a required field.
Select Campus(es) or blank for All	Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click ⋮ to search for campus ID numbers. Otherwise, leave blank to use all campus ID numbers.
Select Frequency(ies), blank for All	Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click ⋮ to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies.
Select Position(s), blank for All	Type a specific position. Otherwise, leave blank to use all positions.
Select Supplement(s), blank for All	Type a specific supplement. Otherwise, leave blank to use all supplement positions.

Generate the report.

User Created Reports

Position Management > Reports > User Created Reports

Use the Table of Contents to access a page.

CYR/NYR Positions - HRS9010

Position Management > Reports > User Created Reports > CYR/NYR Positions

The Position Management User Created Reports CYR/NYR Positions page allows you to perform the following functions:

- Select the applicable fields (i.e., columns) from preselected columns under the following sections:
    - **PMIS Position/Distribution Export File Auto Select Options**
    - **PMIS Position Control**
    - **PMIS Position Distribution**
    - **Employee Demo**
- Create a report title.
- Save your report selections to create a customized report template that can be retrieved for future use. Additionally, you can set a report template to **Public** to allow others with access to User Created Reports to view and use the created report template.

Once the report is created, it can be sorted or filtered. To restore the report to the original view, click **Reset**.

Run a report from a saved template:

Report Template	Begin typing all or part of the name of an existing report template, or press the space bar to view all the templates. As you begin to type, a drop-down list displays report templates with titles that match the letters you have typed. From the drop-down list you can select the template. Only templates you created are listed in the drop-down list. If you do not know the name of the report template, click Directory to select a report template from the directory. From the directory, you can select templates you created as well as public templates.

Create a new template:

Report Template	Type the name of a new report template. Only alphanumeric characters are allowed. If you type a name that is already used, it will overwrite the previous template.
Public	Select to make the report accessible to other users. All users in the district who have access to this page will be able to use the template.

- After entering the title and selecting the columns to include, click **Save**.

Create a new report:

Report Title	Type a title for the report, up to 35 characters.

- The fields are grouped by business table. Select the fields for which you want to print information. You can select an entire group of fields by selecting the group name (e.g.,

Employee Demo).

- In the **Employee Nbr** field, click ⋮ to open the [Employees directory](). Select the employee to be included in the report or leave blank to include all employees.
- In the **Position Nbr** field, click ⋮ to open the [Positions lookup](). Select the position to be included in the report or leave blank to include all positions.
- Under **PMIS Position/Distribution Export File Auto Select Options**, select from the following:
    - **PMIS Position Control**
    - **PMIS Position Distribution**
- Click **Create Report** to generate the report. [Review, save, and/or print the report.]()

Review the report using the following buttons:

Click [First] to go to the first page of the report.
Click ◀ to go back one page.
Click ▶ to go forward one page.
Click [Last] to go to the last page of the report.

The report can be viewed and saved in various file formats.

Click 📄 to save and print the report in PDF format.

Click 📊 to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.
Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Other functions and features:

Sort	[Sort report data.]()
	You can rearrange the fields to indicate the order in which you want the sort applied. Click a field name, and drag it up or down to a new location.
	•
	In the right grid, for each field, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.
	•
	To remove a field from the sort, select the field, and

Filter	Filter report data.
	When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.
	From the report window, click **Sort/Filter** to open the Sort/Filter window. By default, the **Sort Criteria** section is expanded. Click **Filter Criteria** to expand the **Filter Criteria** section.
	If the report does not allow sorting, the **Filter** button is displayed instead of the **Sort/Filter** button, and sort criterion fields are not available.
	Click **Add Criterion** to add new filter criteria. A blank row is added to the grid.

Field	Description
Column	Select a field by which to filter the data. The drop down lists the columns that appear on the report.
Operator	Select an operator. = Equals ≠ Not equals › Greater than ≥ Greater than or equal to ‹ Less than ≤ Less than or equal to
Value	Type the value by which you want to filter. For example, if you selected a date in the **Column** field, type a date to view only data for a specific date. **Note**: When filtering report data by date, you must use the following formats: If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format. If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format. If the date is displayed in the MM/YY format, the filter value must be in the YYMM format.

Other functions and features:

Field	Description
Add Criterion	Add another row. Select the logical connector (AND or OR) in the Logical field. Continue adding rows as needed. Using the AND operator limits search results, because the program looks only for records that contain both criterion. Using the OR operator expands search results, because the program looks for records that contain either one criterion or the other, or both.
Delete Selected	Delete selected row. Select the row, and then click the button. The row is deleted from the filter criteria.

Click **OK** to apply the selected filter criteria to the report.
Click **Cancel** to close the dialog box without applying a filter.

Reset	Reset report data.
	Click to restore the report to the original view, removing all sorting and filtering that has been applied.

Delete	Delete a report template.
	Select the template in the **Report Template** field and click **Delete**.

Position History - HRS9020

Position Management > Reports > User Created Reports > Position History

The Position Management User Created Reports Position History page allows you to perform the following functions:

- Select the applicable fields (i.e., columns) from preselected columns under the following sections:
    - **PMIS Position Control History**
    - **PMIS Position Distribution History**
- Create a report title.
- Save your report selections to create a customized report template that can be retrieved for future use. Additionally, you can set a report template to **Public** to allow others with access to User Created Reports to view and use the created report template.

Once the report is created, it can be sorted or filtered. To restore the report to the original view, click **Reset**.

Run a report from a saved template:

Report Template	Begin typing all or part of the name of an existing report template, or press the space bar to view all the templates. As you begin to type, a drop-down list displays report templates with titles that match the letters you have typed. From the drop-down list you can select the template. Only templates you created are listed in the drop-down list. If you do not know the name of the report template, click Directory to select a report template from the directory. From the directory, you can select templates you created as well as public templates.

Create a new template:

Report Template	Type the name of a new report template. Only alphanumeric characters are allowed. If you type a name that is already used, it will overwrite the previous template.
Public	Select to make the report accessible to other users. All users in the district who have access to this page will be able to use the template.

- After entering the title and selecting the columns to include, click **Save**.

Create a new report:

Report Title	Type a title for the report, up to 35 characters.

- The fields are grouped by business table. Select the fields for which you want to print information. You can select an entire group of fields by selecting the group name (e.g., **PMIS Position Distribution History**).
- In the **Employee Nbr** field, click ⋮ to open the Employees directory. Select the employee to be

included in the report or leave blank to include all employees.

- In the **Position Nbr** field, click ⋮ to open the Positions lookup. Select the position to be included in the report or leave blank to include all positions.
- Click **Create Report** to generate the report. Review, save, and/or print the report.

Review the report using the following buttons:

Click First to go to the first page of the report.
Click ◄ to go back one page.
Click ► to go forward one page.
Click Last to go to the last page of the report.

The report can be viewed and saved in various file formats.

Click 📕 to save and print the report in PDF format.

Click 📊 to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.
Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Other functions and features:

Sort	Sort report data. You can rearrange the fields to indicate the order in which you want the sort applied. Click a field name, and drag it up or down to a new location. • In the right grid, for each field, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order. • To remove a field from the sort, select the field, and

Filter	Filter report data. When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option. From the report window, click **Sort/Filter** to open the Sort/Filter window. By default, the **Sort Criteria** section is expanded. Click **Filter Criteria** to expand the **Filter Criteria** section. If the report does not allow sorting, the **Filter** button is displayed instead of the **Sort/Filter** button, and sort criterion fields are not available. Click **Add Criterion** to add new filter criteria. A blank row is added to the grid.<table><tr><th>Field</th><th>Description</th></tr><tr><td>**Column**</td><td>Select a field by which to filter the data. The drop down lists the columns that appear on the report.</td></tr><tr><td>**Operator**</td><td>Select an operator. = Equals ≠ Not equals › Greater than ≥ Greater than or equal to ‹ Less than ≤ Less than or equal to</td></tr><tr><td>**Value**</td><td>Type the value by which you want to filter. For example, if you selected a date in the **Column** field, type a date to view only data for a specific date. **Note**: When filtering report data by date, you must use the following formats: If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format. If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format. If the date is displayed in the MM/YY format, the filter value must be in the YYMM format.</td></tr></table>**Other functions and features:**<table><tr><td>**Add Criterion**</td><td>Add another row. Select the logical connector (AND or OR) in the Logical field. Continue adding rows as needed. Using the AND operator limits search results, because the program looks only for records that contain both criterion. Using the OR operator expands search results, because the program looks for records that contain either one criterion or the other, or both.</td></tr><tr><td>**Delete Selected**</td><td>Delete selected row. Select the row, and then click the button. The row is deleted from the filter criteria.</td></tr></table>Click **OK** to apply the selected filter criteria to the report. Click **Cancel** to close the dialog box without applying a filter.
Reset	Reset report data. Click to restore the report to the original view, removing all sorting and filtering that has been applied.
Delete	Delete a report template. Select the template in the **Report Template** field and click **Delete**.

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