



Cornell University
Division of Budget and Planning



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Longview Position Data Extract Guide

[Document subtitle]

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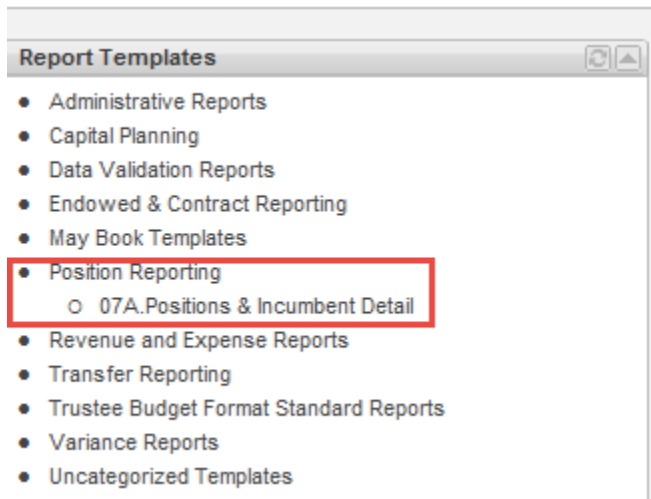
Longview Position Data Extracts

There are two options available for extracting position information out of Longview. Position and incumbent detail can be extracted by running the report '07A. Positions and Incumbent Detail' and then exporting the information to Excel. Position cost allocation information can be extracted by running the app 'Report Cost Allocations' and then exporting the information to Excel. This information can then be manipulated as you wish outside of Longview.

Extract Position and Incumbent Detail

1. Select the Position & Incumbent Detail Report

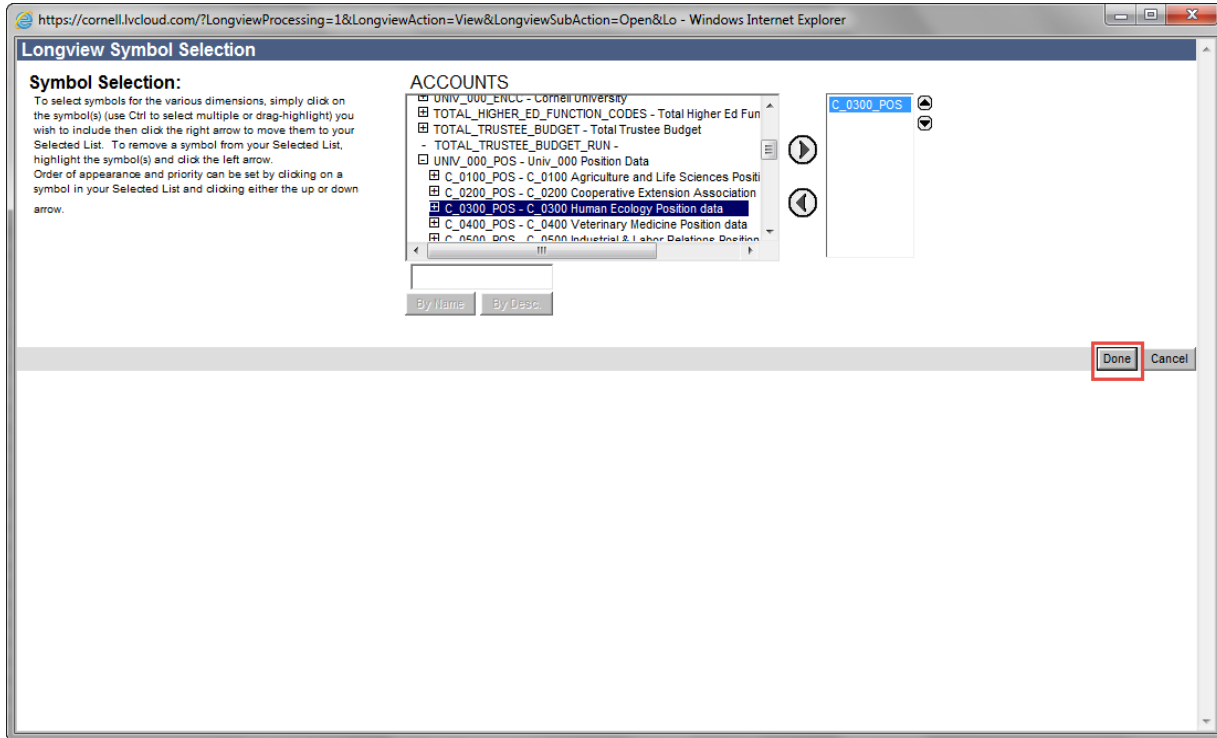
To extract position and incumbent detail information, select the report from Longview Report Templates, '07A. Positions & Incumbent Detail':





2. Select the highest Org level you wish to extract.

The report Symbol Selector screen will appear. Select the Org level you wish to extract from the *_POS hierarchy*. Move it to the selection window on the right using the right arrow key. Deselect any accounts you want by highlighting the account in the right selection window and using the left arrow key. Once you have selected the accounts you want, click on the **Done** button in the lower right of your screen.



3. Expand the report to its lowest level.

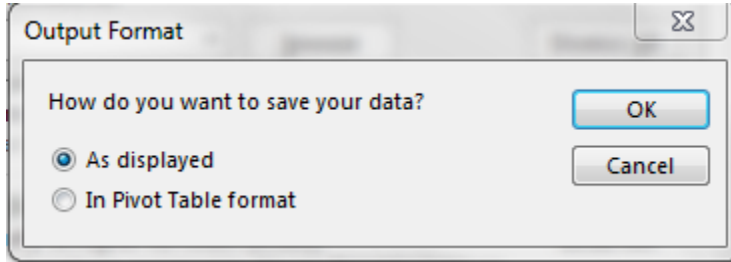
The report will appear on the screen. Expand the report to its lowest level, if necessary. This will show you Employee names and IDs along with the position related information.

		Base Bud 2015							
		SALARY_CALCULATED	SALARY	BASE_BUDGETED_SAL	SALARY_STANDARD_HOURS	SALARY_JOB_STANDARD_HOURS	SALARY_POSITION_FTE	SALARY_JOB_FTE	SAI
C_0300 Human Ecology Position data	00122725 - Administrative Asst III				40.00	39.00	0.97	0.97	
	00169539 - Lecturer				40.00	6.00	0.15	0.15	
	00114668 - Extension Supp Spec I				35.00	29.89	0.85	0.85	
	00138250 - Extension Supp Spec III				35.00	35.00	1.00	1.00	
	00149322 - Prof Assoc				40.00	40.00	1.00	1.00	
	00140234 - Administrative Asst III				40.00	39.00	0.97	0.97	
	00119153 - Bldg Facilt Coord IV				40.00	39.00	0.97	0.97	
	00114590 - Administrative Asst III				40.00	39.00	0.97	0.97	
	00112420 - Research Aide IV				40.00	39.00	0.97	0.97	
	00122740 - Professor				40.00	32.00	0.80	0.80	
	00114595 - Administrative Asst V				40.00	39.00	0.97	0.97	
	00120184 - Finance Specialist III				40.00	40.00	1.00	1.00	
	00120196 - Administrator VI				40.00	40.00	1.00	1.00	
	00120211 - Professor				40.00	40.00	1.00	1.00	
	00134410 - Dept Chairperson				40.00	0.00	0.00	0.00	



4. Export to Excel.

Once expanded, click the Export to Excel button in the tool bar at the top of the page.



A box will appear asking you how you want to save your data. Choose 'As Displayed' and click **OK**.

5. Slice and dice as desired.

From Excel, you are free to manipulate the data as desired. This data can be joined using position number with the Position Cost Allocation data you extract from the 'Report Cost Allocations' app (see next section).

6. Below is the layout of Position and Incumbent Detail data exported to Excel:

Column Header	Description	Example Data
ORGANIZATION	The Organization code and name.	D_0304 Undergraduate Academic Affairs Position data
POSITION NUMBER & DESCRIPTION	Position number - description	00999999 - Administrative Asst III
SALARY_ID	Employee ID	7778899
SALARY_NAME	Employee Name	Last, First M
SALARY_CALCULATED_SALARY	Salary calculated based on WD; this will equal the annual salary for salaried positions, or hourly rate X job standard hours X # of working days in the fiscal year (261 for FY15)	99,999.99
BASE_BUDGETED_SAL	Next Budgeted Salary Amount	88,888.88
SALARY_JOB_FUNCTION	Job Function	Non-Exempt Admin Support
SALARY_JOB_FUNCTION_DESC	Job Function Desc	0
SALARY_COMPANY	Company (ENCC)	Cornell Univ (NYS Colleges & Exper Sta)
SALARY_TYPE	Salary Type	Regular
SALARY_PAY_RATE	Pay Rate	Hourly
SALARY_JOB_CODE	Job Code	10015
SALARY_JOB_CODE_DESC	Job Code Desc	Administrative Asst III
SALARY_STANDARD_HOURS	Standard Hours	40.00
SALARY_JOB_STANDARD_HOURS	Job Standard Hours	39.00
SALARY_FULL_PART_TIME	Full or Part Time	Full time
SALARY_POSITION_FTE	Position FTE	0.98
SALARY_JOB_FTE	Job FTE	0.98



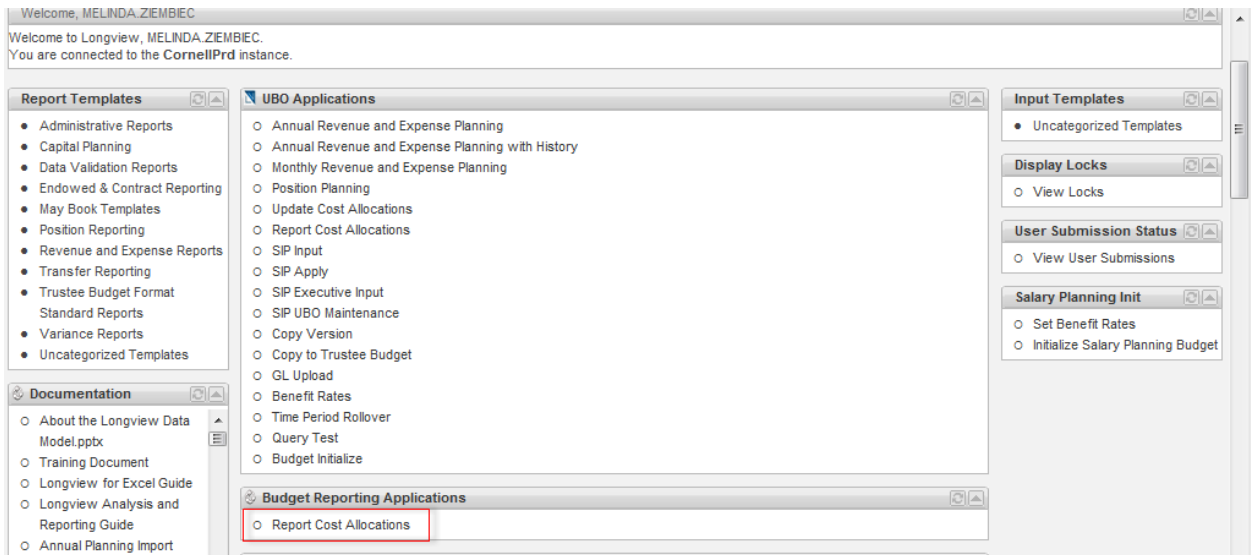
Column Header	Description	Example Data
SALARY_STATE_CERTIFIED	State Certified Position	State Certified Position - No
SALARY_WORK_MONTHS	Work Months	12.00
SALARY_BASE_SALARY	Base Salary	99.99



Extract Position Cost Allocation information.

1. Select the Report Cost Allocation app.

To extract Position Cost Allocation information, select the 'Report Cost Allocations' app from the Longview Budget Reporting Applications frame:



2. Select the Report Parameters.

The report parameter window will appear. Here you will select the parameters (filters) you wish to use to obtain the level of detail cost allocation information you wish to extract.

Select Report Parameters	
Account	C_0300
Object	SWAG
Fund	All
Higher Ed Code	All - All Higher Ed Codes
Company	All - All Companies

Account – enter the Org level you wish to extract. By using the magnifying glass, you will be presented with an account hierarchy based on your security access from which you can select the account level you wish to extract.



Object – SWAG is the name of the entire object hierarchy. Selecting SWAG will give you all object codes for the account level you selected. To narrow the extract down to specific object codes, use the magnifying glass to select the object codes you desire from the Object code hierarchy.

Fund – Select All funds for the account level you chose or use the magnifying glass to be presented with the fund group / sub fund group hierarchy from which you may limit to particular fund groups / sub fund groups.

Higher Ed Code – Select All higher ed codes for the account level you chose or use the down arrow for a drop down list of higher ed codes to select.

Company – Select All for both Endowed and Contract or use the down arrow to limit your selection to one company.

Click the **Next** button in the lower right corner of the screen to run the process.

3. Expand the ‘Total % Leave and Sabbatical’ and ‘Total \$ Leave and Sabbatical’ columns of the report.

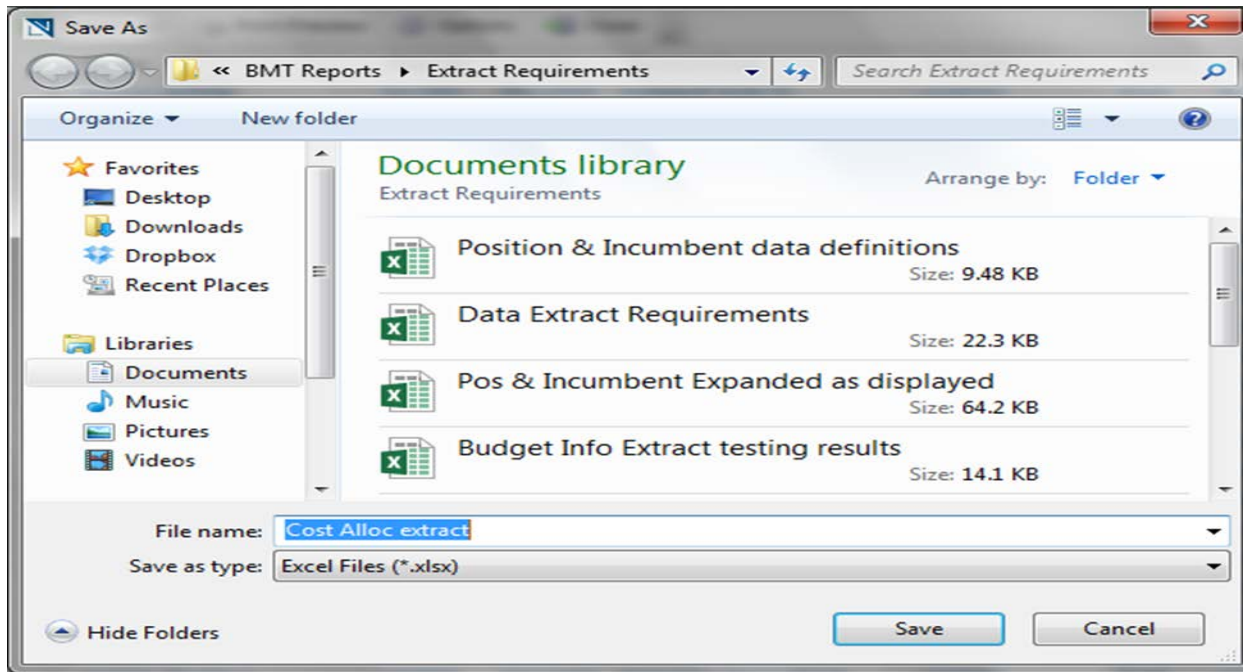
The Cost Allocation report will appear on the screen. Fully expand the ‘> Total % Leave and Sabbatical’ and ‘>Total \$ Leave and Sabbatical’ columns at the very far right of the report. This will show you the breakdown of percentages and monies by leave type and sabbatical type and allow these categories to be exported.

4. Export your data to Excel.

Click the **Export List** button in the upper left corner of the screen to export your data to Excel.

Name	Empl ID	Positio...	PositionDesc	Account	Object	Obj Par	Sub...	% Distr(W...	% Distr	Flag	Salary Calc
L	1011962	00112420	Research Aide IV	3238302	5320	NOEX	---	100.00	100.00		
L	1012226	00112421	Administrative Asst II	3233609	5300	NOEX	---	45.00	45.00		
L	1012226	00112421	Administrative Asst II	3233620	5300	NOEX	---	25.00	25.00		
L	1012226	00112421	Administrative Asst II	3238642	5300	NOEX	---	30.00	30.00		
L	1016668	00112423	Administrative Asst III	3008106	5300	NOEX	---	15.00	15.00		
L	1016668	00112423	Administrative Asst III	3233101	5300	NOEX	---	85.00	85.00		
L	1019803	00112424	Administrative Asst IV	3233609	5300	NOEX	---	55.00	55.00		
L	1019803	00112424	Administrative Asst IV	3233620	5300	NOEX	---	20.00	20.00		
L	1019803	00112424	Administrative Asst IV	3238642	5300	NOEX	---	25.00	25.00		

You will be presented with a box asking where you would like to save your Excel file export. Enter the location for your export file.



The cost allocation data displayed on your screen is exported to Excel.

5. Slice and dice as desired.

From Excel, you are free to manipulate the data as desired. This data can be joined using position number with the Position and Incumbent Detail data you extract from the 'Position and Incumbent Detail' report (see previous section).

6. Below is the layout of Report Cost Allocations position data exported to Excel:

Column Name	Description	Example Data
Name	Employee Name	Last, First M
Empl ID	Emplid	9999999
Position ID	Position Number	999999
Position Desc	Position Description	Research Aide
Account	Account	3238302
Object	Object code	5320
Obj Par	Object Level	NOEX
SubObj	Sub Object code (--- if none exists)	---
% Distr(WD)	Current committed % distribution in WD. This is the latest % distribution as of the last data load from WD.	100
% Distr	Next budgeted % distribution	100
Flag	When = 'A', this flag indicates a difference exists between cost allocations currently in WD and cost allocations planned for the next fiscal year.	A



Column Name	Description	Example Data
Salary Calc	Salary calculated based on WD; this will equal the annual salary for salaried positions, or hourly rate X job standard hours X # of working days in the fiscal year (261 for FY15). Jolene – This is what I have in my notes from our discussion with Les for this field: ‘HR Calc Salary Amount will change if you change the planned distribution (salary times Salary_distribution)’. Did you all verify that?	99999
Base Bud Sal	Next budgeted salary amount	88888
Fund	Sub Fund Group Name	CG_CGFEDL_DEFLT
HEC	Higher Ed Code	4300
EN/CC	Endowed/Contract	CC
Notes	Notes text	
ADMN	% ADMN Leave Type	50
DEL	% DEL Leave Type	0
HIRE	% HIRE Leave Type	0
LPRT	% LPRT Leave Type	0
LWOP	% LWOP Leave Type	0
LWP	% LWP Leave Type	0
NEW	% NEW Leave Type	0
NONE	% NONE Leave Type	0
OTH	% OTH Leave Type	0
PRET	% PRET Leave Type	0
RET	% RET Leave Type	0
STLV	% STLV Leave Type	0
TERM	% TERM Leave Type	0
% Leave	Total % ALL Leave types	50
SABA	% SABA Sabbatical Type	0
SABC	% SABC Sabbatical Type	0
SABF	% SABF Sabbatical Type	0
SABO	% SABO Sabbatical Type	0
SABS	% SABS Sabbatical Type	0
% Sabbatical	Total % ALL Sabbatical types	0
Total % Leave and Sabbatical	Total % of ALL Leave and Sabbatical Types	50
ADMN	\$ ADMN Leave Type	50000
DEL	\$ DEL Leave Type	0
HIRE	\$ HIRE Leave Type	0
LPRT	\$ LPRT Leave Type	0



Column Name	Description	Example Data
LWOP	\$ LWOP Leave Type	0
LWP	\$ LWP Leave Type	0
NEW	\$ NEW Leave Type	0
NONE	\$ NONE Leave Type	0
OTH	\$ OTH Leave Type	0
PRET	\$ PRET Leave Type	0
RET	\$ RET Leave Type	0
STLV	\$ STLV Leave Type	0
TERM	\$ TERM Leave Type	0
\$ Leave	Total \$ ALL Leave types	50000
SABA	\$ SABA Sabbatical Type	0
SABC	\$ SABC Sabbatical Type	0
SABF	\$ SABF Sabbatical Type	0
SABO	\$ SABO Sabbatical Type	0
SABS	\$ SABS Sabbatical Type	0
\$ Sabbatical	Total \$ ALL Sabbatical types	0
Total \$ Leave and Sabbatical	Total \$ of ALL Leave and Sabbatical Types	50000