

How to Review Positions and Employee Information using infoAdvantage Reports

9/11/2013

- >Login to infoAdvantage
- >Document List
- >Public Folders
- >Vermont Reports
- >Budget Preparation
- >Choose either ‘Excel Position Summary’ (no fund/appropriation allocation information) or ‘Excel Position Detail With Fund Splits’
- >Double-Click to Open the report

The screenshot displays the AM infoAdvantage web application interface. At the top, there is a navigation bar with the logo and the text "AM infoAdvantage". Below the logo, there are navigation links: "Home", "Document List", "Open", and "Send To".

The main content area is divided into two panes. The left pane shows a file explorer view with a tree structure under "All". The tree includes "My Favorites", "Inbox", "Public Folders", "Report Conversion To", "Vermont Reports", "As Passed Budget", "Budget and Mana", "Budget Monitoring", and "Budget Preparatio". The "Budget Preparatio" folder is selected and highlighted in blue.

The right pane displays a list of documents with a "Title" column header. Each document entry includes a small icon and a text description. The list contains the following items:

Title
Budget by Major Object NOT For Legislative Budget Package
Budget Detail Report For Legislative Budget Package
Budget Rollup For Legislative Budget Package
Excel Position Detail With Fund Splits
Excel Position Summary
Federal Grants Receipts For Legislative Budget Package
Grants to Non-State-Government Entities For Legislative Budget Package
Interdepartmental Transfers Receipts For Legislative Budget Package
Position Detail Report NOT For Legislative Budget Package
Position Summary For Legislative Budget Package
Position Summary with Employee Details NOT For Legislative Budget Package

AMS infoAdvantage

Home | Document List | Open | Send To | Help | Preferences | About | Log Out

Web Intelligence - Excel Position Summary

Document | View | 100% | 1 / 1

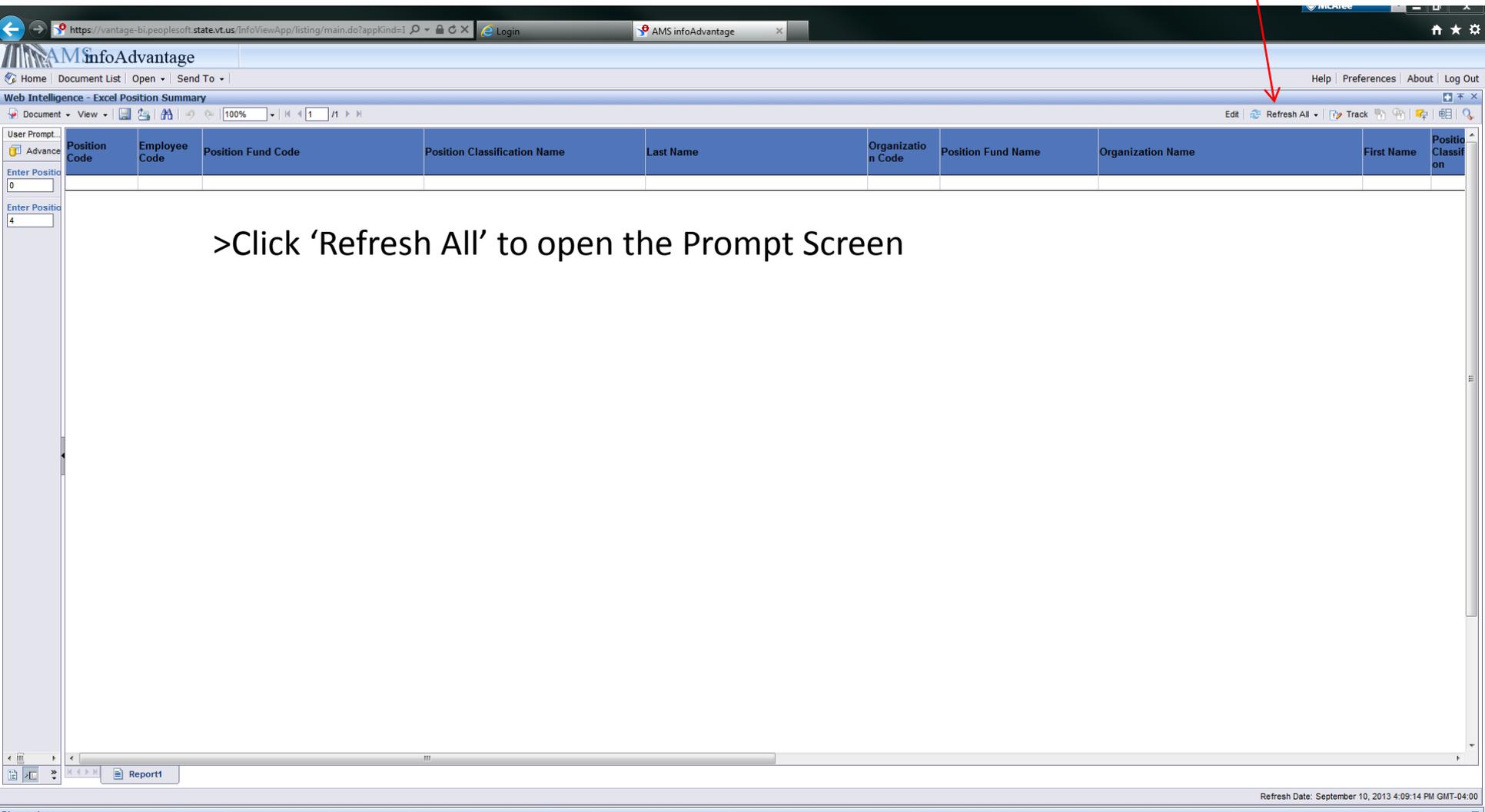
Edit Refresh All Track

Position Code	Employee Code	Position Fund Code	Position Classification Name	Last Name	Organization Code	Position Fund Name	Organization Name	First Name	Position Classification
>Click 'Refresh All' to open the Prompt Screen									

Report

Refresh Date: September 10, 2013 4:09:14 PM GMT-04:00

Discussions



Position Code	Employee Code	Position Fund Code	Position Classification Name	Last Name	Organization Code	Position Fund Name	Organization Name	First Name	Position Classification
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>In Position Organization:
enter a DeptID, Business Unit, or Agency Code
>In Position Organization Consolidation Level:
enter the corresponding level – 2=Agency;
3=Department(BU);
4=Appropriation(DeptID)
>Click 'Run Query'

Prompts

Reply to prompts before running the query.

- Enter Position Organization Code (* for All): 0
- Enter Position Organization Consolidation Level: 4

Type values here

Refresh Values

To see the content of the list, please click the Refresh values button.

Enter your search pattern here

Enter Position Organization Code (* for All): 0

More Information

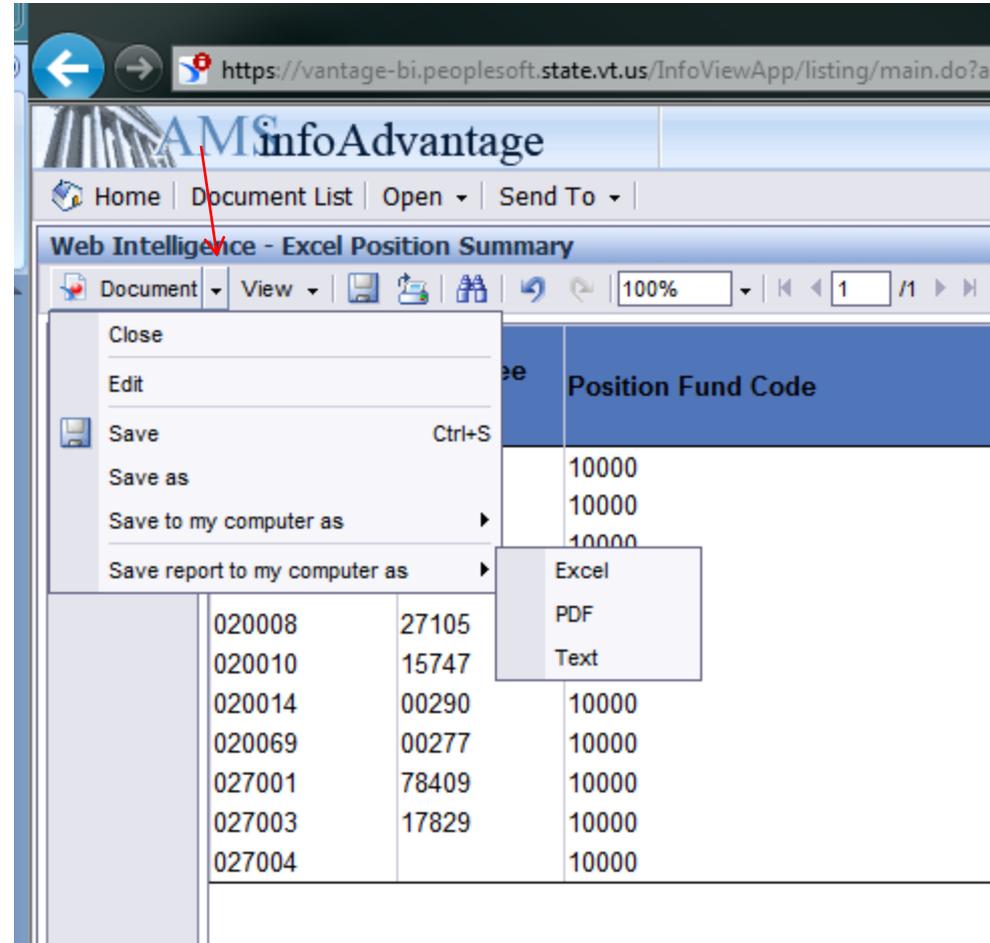
Select or type the values you want to return to reports for each prompt displayed here.

Run Query Cancel

After the report has loaded, you may export it to Excel for easier use. To export to Excel:

- >Click the arrow to the right of Document
- >Scroll over 'Save report to my computer as'
- >Click 'Excel'

Note: you may have to Open or Save the excel file depending on your browser and security settings



Review Positions and Employees

- Be sure to review the following: employee funding and appropriation allocations grade; step; classification; etc.
 - We will not be making changes to benefit selections (few exceptions may apply).
- Highlight any changes to make for your FY2015 budget, and coordinate with your budget analyst to make those changes.