

# UDW+ POSITION MANAGEMENT

The combined capabilities of PeopleSync and UDW+ provides NYU with the ability to plan, manage, and report on academic and non-academic positions with a much greater level of clarity and visibility, with the start of fiscal year 2017.

The UDW+ Position Management project provisions data access and new reporting tools to track and analyze data. This project is a result of the new functionality in PeopleSync to budget for personnel expenses at the position level.

Two new dashboards and enhancements to current financial reports are available to the UDW+ reporting community.

## NEW UDW+ POSITION MANAGEMENT DASHBOARD

The **NEW Position Management Dashboard** allows you to view **budget, pre-encumbrance, encumbrance, expense** and **balance** for a given chartfield combination or a specific position by a fiscal year/accounting period. Use this dashboard to:

- Analyze recruitment and new hire impact on the available balance.
- Evaluate monthly payroll activity and adjustment by position.
- Preview unfilled positions with open requisitions.
- Review transaction level history of a given position.

Position Management Report								
Position ID	Business Title	Position Status	Full Chartfield	Budget Amount	Pre-Encumbrance Amount	Encumbrance Amount	FYTD Expense	Available Balance
	Manager	Filled		45,214.26	0.00	41,736.24	3,453.34	24.68
<b>Grand Total</b>				<b>45,214.26</b>	<b>0.00</b>	<b>41,736.24</b>	<b>3,453.34</b>	<b>24.68</b>

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## NEW UDW+ POSITION RESTRUCTURE REPORT

The **NEW Position Restructure Report** provides you with **restructure details** for a given **position** or list of positions within a Supervisory Organization. It displays the **current position, restructure type** and **previous position IDs**.

### Restructuring Positions Report

Current Position ID	Current Position	Restructure Type	Current Position Effective Date	Prior Position ID 1	Prior Position 1 Title	Prior Position ID 2	Prior Position 2 Title	Prior Position 3 or Higher
	Manager	Consolidating Positions into One	5/31/2016 12:00:00 AM		Associate Director		Assistant Manager	

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## CURRENT FINANCE REPORTS ENHANCED WITH PRE-ENCUMBRANCE COLUMN

The following finance reports have been enhanced with the addition of a **NEW pre-encumbrance** column:

- Salary Expense Report Daily
- Budget Summary and Balance Report
  - Budget Detail Report
  - Fund Balance Report
- Budget Control Report
- Grants Management Report
- Grants Budget Detail

### Budget Summary Report

Summary Report

Fund:  Org:  Program:  Project:

Original Budget Net **-495,864.84** Revised Budget Net **-496,614.84** YTD Actual Net **-43,049.47** ITD Actual Net **-43,049.47**

Account	Original Budget (A)	Revised Budget (B)	Current Month (C)	Year To Date (D)	Inception To Date (E)	Pre-Encumbrance (F)	Encumbrance (G)	Exception (H)	Budget Checked Balance (B-E-F-G+H)
Expense Personnel 51110 - Salaries - Admin. MGMT PT	68,500.08	68,500.08	5,708.34	5,708.34	5,708.34	0.00	62,791.74	0.00	0.00
Expense 51170 - Fringe Benefits-Composite Rate	427,364.76	428,114.76	37,341.13	37,341.13	37,341.13	3,875.00	385,300.67	0.00	1,597.96
<b>Subtotal Personnel Expense</b>	<b>495,864.84</b>	<b>496,614.84</b>	<b>43,049.47</b>	<b>43,049.47</b>	<b>43,049.47</b>	<b>3,875.00</b>	<b>448,092.41</b>	<b>0.00</b>	<b>1,597.96</b>
<b>Expense Total</b>	<b>495,864.84</b>	<b>496,614.84</b>	<b>43,049.47</b>	<b>43,049.47</b>	<b>43,049.47</b>	<b>3,875.00</b>	<b>448,092.41</b>	<b>0.00</b>	<b>1,597.96</b>

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## UDW+ POSITION MANAGEMENT TRAINING AND QUESTIONS

Please view the [UDW+ Position Management Reference Guide](#) for a detailed description and use cases for the newly available UDW+ dashboards and enhanced reports.

Questions about **UDW+ Position Management Dashboards** should be directed to the **Decision Support Group** at [askDSG@nyu.edu](mailto:askDSG@nyu.edu) or [212-998-2900](tel:212-998-2900).

## PEOPLESYNC POSITION MANAGEMENT TRAINING AND QUESTIONS

Position Management training within **PeopleSync** is available in **iLearn**, by searching for "**HRS 000: PeopleSync**", under the **Position Management** section.

Questions about **PeopleSync** should be directed to PeopleLink at [askpeoplelink@nyu.edu](mailto:askpeoplelink@nyu.edu) or 212-992-LINK.

Questions about **Budget Planning** or **BudMod** should be directed to your **Budget Analyst**.

