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/*Creates Fiscal Year FTE file for InfoCenter dashboard and Ad-Hoc analysis*/
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```
/* Grabs fields for FTE*/
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```
PROC SQL;
```

```
create table FY_FTE as
```

```
select
```

```
    eff_date_fy,  
    dos_code_cps,  
    dos_desc_cps,  
    pers_pgm,  
    location_1,  
    location_2,  
    location_3,  
    loc_indicator,  
    loc_ind_description,  
    appt_type_code,  
    appt_type_code_pri,  
    function_code,  
    function_name,  
    fund_group_code,  
    fund,  
    paid_over_code,  
    appt_basis_code,  
    TRIM(Org_1_Code) as org_1_code,  
    Org_1_Title,  
    TRIM(Org_2_Code) as org_2_code,  
    Org_2_Title,  
    TRIM(Org_3_Code) as org_3_code,  
    Org_3_Title,  
    UAS_Discipline_Code,  
    SAU_Code,  
    HOME_DEPARTMENT_NAME,  
    HOME_DEPARTMENT_CODE,  
    CLASS_TTL_OUTL_CODE_APPT,  
    TRIM(CLASS_TTL_OUTL_NAME_APPT) as CLASS_TTL_OUTL_NAME_APPT,  
    title_code,  
    title_name,  
    title_code_pri_appt,  
    pps_separation_reason_name,  
    date_of_most_recent_hire,  
    cat(location_1, employee_number) as unique_id,  
    sum(TOT_FY_GROSS_EARNINGS) as TOT_FY_GROSS_EARNINGS,  
    sum(TOT_FY_HOURS_WORKED) as TOT_FY_HOURS_WORKED,  
    sum(TOT_FY_TIME_DISTRIB) as FTE_Annual,
```

```
/* UCLA had a minor amount of negative FTE found under the systemwide  
assessment in 2010-11*/
```

```
Case
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```
    When EFF_DATE_FY = 'JUN2011' and LOCATION_1 = '04' and FUND = '69085'
```

```
THEN 'Exclude'
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```
    Else 'Include'
```

```
END as LA_FY11_Fix,
```

```

/*Calculates FTE by dividing over 12 months*/
calculated FTE_Annual/12 as FTE_Monthly,

/* Calculates FTE dividing by Paid Over time period or 12 months*/
Case
    When paid_over_code = '9' then 9
    When paid_over_code = '10' then 10
    When paid_over_code = '11' then 11
    Else 12
    End as Paid_over_full,

calculated FTE_Annual/calculated Paid_over_full as FTE_PaidOverAdj_PdOv,

/* Calculates FTE dividing by Appt Basis Code or 12 months*/
Case
    When appt_basis_code = '9' then 9
    When appt_basis_code = '10' then 10
    When appt_basis_code = '11' then 11
    Else 12
    End as Appt_basis_full,

calculated FTE_Annual/calculated Appt_basis_full as FTE_PaidOverAdj_Appt,

/*This statement flags if the title codes we choose as primary are the same as
the primary title code in CPS*/
Case
    When title_code <> title_code_pri_appt THEN 'Non-primary CPS'
    Else 'Primary CPS'
    End as Primary_Title_CPS_flag,

/*Flags Excluded Groups (Emeriti, Supp Pay, etc.)*/
Case
    When calculated CTO_code_appt_fix in ('016','216','316','346','999') then
'Exclude'
    Else 'Include'
    End as HC_Include_Flag,

/*Flag for Provosts & Chancellors*/
Case
    When TITLE_CODE = '000030' THEN 'Chancellor'
    When calculated CTO_code_appt_fix = 'S27' THEN 'Provost'
    Else 'Neither'
    END as ChancellorOrProvost,

/*fills in blanks for appt_type_code using appt_type_code_pri and creates new
field appt_type_use*/
Case
    When appt_type_code = '' THEN appt_type_code_pri
    Else appt_type_code
    End as Appt_type_use,

```

```
/*Personnel Program Academic and Non-Academic Grouping (extra statements
needed for years prior to 2005)*/
```

```
Case
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```
    When Pers_Pgm = 'ACA' Then 'Academic'
    When Pers_Pgm in ('PSS','MSP','SMG','UNK') Then 'Non-Academic'
    When first(class_ttl_outl_code_appt) in
('A','B','C','D','E','F','G','H','I','J','M','Z') then 'Non-Academic'
    Else 'Academic'
    End as Pers_Prgm_Academic,
```

```
/*Personnel Program Categories breaks managers out from senior professionals
in MSP, breaks students out from PSS, and for several years some employees
were miscategorized with the CTO of M05, which is used for those in the SMG
personnel program when they should have been in the 'Managers' CTO of M10.*/
```

```
Case
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```
    When calculated CTO_code_appt_fix in
('010','011','012','030','031','040','041','042','114','124','210','211','212'
,'218','520','521','522','530','531','532') THEN 'Faculty - Ladder-rank and
Equivalent'
    When calculated CTO_code_appt_fix in ('311','317','323','335','341') THEN
'Faculty - Clinical/In-Residence/Adjunct'
    When calculated CTO_code_appt_fix in ('221','225','357') THEN 'Faculty -
Lecturers'
    When calculated CTO_code_appt_fix = '446' THEN 'Medical
Interns/Residents'
    When calculated CTO_code_appt_fix in ('575','577') THEN 'Postdoctoral
Scholars'
    When calculated CTO_code_appt_fix in ('426','436','456','467','477') THEN
'Student Teaching/Research Assistants'
    When PERS_PGM = 'ACA' or calculated Pers_Prgm_Academic = 'Academic' then
'Other Academic Employees'
    When calculated appt_type_use = '4' THEN 'Student Staff'
    When PERS_PGM = 'MSP' AND calculated CTO_code_appt_fix = 'M05' THEN 'MSP
- Managers'
    When calculated CTO_code_appt_fix = 'M10' THEN 'MSP - Managers'
    When PERS_PGM = 'MSP' THEN 'MSP - Senior Professionals'
    When PERS_PGM = 'SMG' or calculated CTO_code_appt_fix = 'M05' THEN
'Senior Management Group'
    Else 'PSS - Non Students'
    END as Pers_Prgm_CTO,
```

```
/*Creates DOS Base flag and fix for Irvine in Oct 2015*/
```

```
Case when dos_code_cps not in ('AW','AV','AX','AM','HR','HD','HY') Then 'Non-
Base'
```

```
    Else 'Base'
    End as DOS_Base_Flag,
```

```
/*Creates DOS Regular flag*/
```

```
Case
```

```
    When dos_code_cps not in ('AW','AV','AX','AM','HR','HD','HY','RT') Then
'Non-Regular'
    Else 'Regular'
```

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        End as DOS_Regular_Flag,

/*Creates flag for DOS earnings to exclude*/
Case
    When dos_code_cps in ('XX', 'LV', 'DB', 'DS') then 'Exclude'
    Else 'Include'
    End as DOS_Exclude_Earnings,

/*Academic Senate Flag*/
Case
    When calculated Pers_Prgm_Academic = 'Academic' and
class_ttl_outl_code_appt in
('010', '011', '012', '114', '210', '212', '211', '311', '317') THEN 'Senate'
    When calculated Pers_Prgm_Academic = 'Academic' THEN 'Non-Senate'
    Else 'NA'
    END as Senate_Flag,

/* uses location 2 and SAU code to separate UCOP and ANR and create a complete
location field called "Location Full"*/
Case
    When location_2 = '2' and sau_code <> '4' THEN 'Office of the President &
SWP'
    When location_2 = '2' and sau_code = '4' THEN 'Agriculture & Natural
Resources'
    When location_1 = '01' then 'Berkeley'
    When location_1 = '02' then 'San Francisco'
    When location_1 = '03' then 'Davis'
    When location_1 = '04' then 'Los Angeles'
    When location_1 = '05' then 'Riverside'
    When location_1 = '06' then 'San Diego'
    When location_1 = '07' then 'Santa Cruz'
    When location_1 = '08' then 'Santa Barbara'
    When location_1 = '09' then 'Irvine'
    When location_1 = '10' then 'Merced'
    End as Location_full,

/* sorts appt_type_code in career/non-career and creates new field*/
Case
    When pers_pgm = 'ACA' then 'Academic'
    When appt_type_code in ('2', '7') THEN 'Career Staff'
    When appt_type_code = '' and appt_type_code_pri in ('2', '7') THEN 'Career
Staff'
    Else 'Non-career'
    End as Appt_career,

/* General Campus/UC Health split, using loc 3, CTO, and org titles to correct
for campus miscategorizations*/
Case
    When LOCATION_3 = '2' or CLASS_TTL_OUTL_CODE_APPT = '446' THEN 'UC
Health'
    /*Fixes for Irvine, Riverside, Los Angeles, and San Diego*/
    When LOCATION_3 = '1' AND (

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        (LOCATION_1 = '09' AND TRIM(ORG_1_CODE) in
('99030','9MEDC','92000','99701')) or
        (LOCATION_1 = '05' AND TRIM(ORG_1_CODE) = '5ORG40') or
        (LOCATION_1 = '04' AND TRIM(ORG_1_CODE) in ('44000','42200','43200')) or
        (LOCATION_1 = '06' AND TRIM(ORG_1_CODE) in ('6000003','6
3','6000005','6      5','60003','60008','6000008','60005'))
        THEN 'UC Health'
        ELSE 'General Campus'
        END as Service_focus,

/*Med Center Breakout by loc indicator*/
Case
    When loc_indicator = 'M' and calculated Service_focus = 'UC Health' Then
'Med Center'
    Else 'Non-Med Center'
    End as MedCntr_breakout_LocIndM,

/*Med Center Breakout by function*/
Case
    When function_code = '42' and calculated Service_focus = 'UC Health' Then
'Med Center'
    Else 'Non-Med Center'
    End as MedCntr_breakout_Func42,

/*Fund Categories*/
Case
    When TRIM(FUND_GROUP_CODE) in ('401','402','40411') THEN 'General Funds'
    When TRIM(FUND_GROUP_CODE) in
('40311','40312','403141','403142','403143','403144','403145','403146','403147
','403148','403149','40315','403151','403152','403153','4032') THEN 'Student
Tuition & Fees'
    When FUND = '69085' THEN 'Systemwide Assessment'
    ELSE 'Non-Core Funds'
    END as Fund_Categories,

/*Fund Core vs NonCore*/
Case
    When TRIM(FUND_GROUP_CODE) in
('401','402','40411','40311','40312','403141','403142','403143','403144','4031
45','403146','403147','403148','403149','40315','403151','403152','403153','40
32') THEN 'Core Funds'
    ELSE 'Non-Core Funds'
    END as Fund_Core,

/*Job Family Categorization for Employee Trends report. S56 was
"uncategorized" in prior years but is now considered "All Others"*/
Case
    When pers_pgm <> 'ACA' and APPT_TYPE_CODE <> '4' then
    Case
        When APPT_TYPE_CODE = '' and appt_type_code_pri = '4' then
'Uncategorized'

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        When CLASS_TTL_OUTL_CODE_APPT in
('A10','A15','A20','A25','A30','A35','C10','C15','C20','C30') THEN 'Student
Services (including Health, Housing, and Dining)'
        When CLASS_TTL_OUTL_CODE_APPT in
('H10','H15','H20','H25','H30','H35','H40','H45','H50','H55','H60','H65','H70'
,'H75','H80') THEN 'UC Health'
        When CLASS_TTL_OUTL_CODE_APPT = 'F20' THEN 'Administrative
Analysis'
        When CLASS_TTL_OUTL_CODE_APPT in ('B15','B20','B40','B30') THEN
'Clerical & Allied Services'
        When CLASS_TTL_OUTL_CODE_APPT = 'F15' THEN 'Computer Programming
and Analysis'
        When CLASS_TTL_OUTL_CODE_APPT in
('E10','E15','E20','G15','G20','G23','G25','G33','G35','G40','G45','G55','G65'
,'G75','G80') THEN 'Arch./Engineering/Maint & Plant Operations'
        When CLASS_TTL_OUTL_CODE_APPT in
('D10','D15','D25','F10','F30','F35','F40','F45','I10','I15','I20','I25','J10'
,'J15','M20','Z10','Z20','Z25') THEN 'All Others (Laboratory, Comm. & Fiscal
Serv)'
        Else 'All Others (Laboratory, Comm. & Fiscal Serv)'
        End
    ELSE 'Uncategorized'
    END as Job_Family,

/* Largely Administrative/Programmatic*/
Case
    When Function_Code in ('43', '64', '72') THEN 'Largely Administrative'
    When Org_3_Title = 'CALIFORNIA DIGITAL LIBRARY' THEN 'Largely
Administrative'
    ELSE 'Largely Programmatic'
    END as Administrative_Programmatic,

/* Strategic Areas*/
Case
    When Org_3_Title in ('BUSINESS RESOURCE CENTER','UCOP BUSN RESOURCE CTR')
THEN 'Business Resources Center'
    When Org_3_Title in ('CHIEF INVESTMENT OFFICER IMMED','IMMED OFFICE
TREASURER') THEN 'Chief Investment Officer'
    When Org_3_Title = 'INNOVATIVE LEARNING TECH INITI' THEN 'ILTI Online
Education'
    When Org_3_Title in ('APPLICATION TECHNOLOGY SERVICE','IMM OFC INFO
RESOURCES & COMM','IMM OFC INFO TECH SRVCS','IT SECURITY & PRIVACY','ITS
CLIENT SERVICES','ITS STRATEGIC PLANNING','TECHNOLOGY DELIVERY
SERVICES','TECHNOLOGY SUPPORT SERVICES') AND Fund = '66030' THEN 'UCPath
charged to Information Technology'
    When Org_3_Title in ('APPLICATION TECHNOLOGY SERVICE','IMM OFC INFO
RESOURCES & COMM','IMM OFC INFO TECH SRVCS','IT SECURITY & PRIVACY','ITS
CLIENT SERVICES','ITS STRATEGIC PLANNING','TECHNOLOGY DELIVERY
SERVICES','TECHNOLOGY SUPPORT SERVICES') THEN 'Information Technology'
    When Org_3_Title in ('IMMED OFFICE GEN COUNSEL','Office of General
Counsel','PROCUREMENT SERVICES','SW PROCUREMENT SERVICES') THEN 'Procurement
Services'

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        When Org_3_Title in ('RISK MANAGEMENT','RISK SERVICES') THEN 'Risk
Services'
        When Org_3_Title in ('UCPATH CENTER','UCPATH CTR:BUSINESS
OPERATIONS','UCPATH CTR:CUSTOMER SERVICE','UCPATH CTR:HUMAN RESOURCES','UCPATH
CTR:IMMED OFFICE','UCPATH CTR:IMMEDIATE OFFICE','UCPATH
CTR:OPERATIONS','UCPATH CTR:QUALITY & PERFORMAN','UCPATH
CTR:TECHNOLOGY','UCPATH PMO') THEN 'UC Path'
        ELSE 'X-Other'
        END as Strategic_Areas,

/*Student Faculty Ratio FTE Flag*/
Case
        When function_code = '40' and calculated service_focus = 'General Campus'
        and fund_group_code not in ('4034','403161','403162') and calculated
Dos_base_flag = 'Base'
        and calculated CTO_code_appt_fix in
('010','011','012','016','040','042','114','124','210','211','212','216','221'
,'225','311','323','335','357','467','577')
        Then 'Include'
        Else 'Exclude'
        End as SFR_flag,

/* By Agreement FTE Flag*/
Case
        When function_code = '40' and calculated service_focus = 'General Campus'
        and fund_group_code not in ('4034','403161','403162') and dos_code_cps =
'AF'
        and calculated CTO_code_appt_fix in
('010','011','012','016','040','042','114','124','210','211','212','216','221'
,'225','311','323','335','357','467','577')
        Then 'Include'
        Else 'Exclude'
        End as ByAgr_Flag

/*Source table name*/
from PERS.PER_FY_ALL

/* List years to gather data for as in 'JUN 20**' */
where eff_date_fy in
('JUN2003','JUN2004','JUN2005','JUN2006','JUN2007','JUN2008','JUN2009','JUN201
0','JUN2011','JUN2012','JUN2013','JUN2014','JUN2015','JUN2016','JUN2017')

/* Copy of "selected" fields above, minus the ones that are within a function
(i.e. sum, count, etc.)*/
group by
        eff_date_fy,
        dos_code_cps,
        dos_desc_cps,
        pers_pgm,
        location_1,
        location_2,
        location_3,

```

```
loc_indicator,  
loc_ind_description,  
appt_type_code,  
appt_type_code_pri,  
function_code,  
function_name,  
fund_group_code,  
fund,  
paid_over_code,  
appt_basis_code,  
org_1_code,  
Org_1_Title,  
org_2_code,  
Org_2_Title,  
org_3_code,  
Org_3_Title,  
UAS_Discipline_Code,  
SAU_Code,  
unique_id,  
HOME_DEPARTMENT_NAME,  
HOME_DEPARTMENT_CODE,  
CLASS_TTL_OUTL_CODE_APPT,  
CLASS_TTL_OUTL_NAME_APPT,  
title_code,  
title_name,  
title_code_pri_appt,  
pps_separation_reason_name,  
date_of_most_recent_hire;
```

```
quit;
```