COLUMBIA UNIVERSITY HUMAN RESOURCES

Human Resources (HR) Manager Reports

Generating HR Data Reports at Columbia University

Training Guide

Introduction

The Purpose of this Training Guide

The purpose of this training guide is to provide you with guidance for accessing and generating HR Manager reports.

HR Manager Reports

- **Training Guide**
- **Job Aid**

Table of Contents

Columbia University HR Manager Reports

The Purpose of this Lesson

The purpose of this lesson is to review the Columbia University Reporting sites, how to access and navigate the application used to generate HR Manager reports and how to view, save and print HR Manager reports.

Lesson Learning Objectives:

At the end of this lesson, you will be able to:

- Recall Reporting mechanisms used at Columbia University
- Describe the Report Components of the HR Data Store
- Access and Navigate the HR Manager Resources Section of myColumbia
- Access, view, print and save HR Manager Reports
- Describe the available HR Manager Reports

Reporting at Columbia University

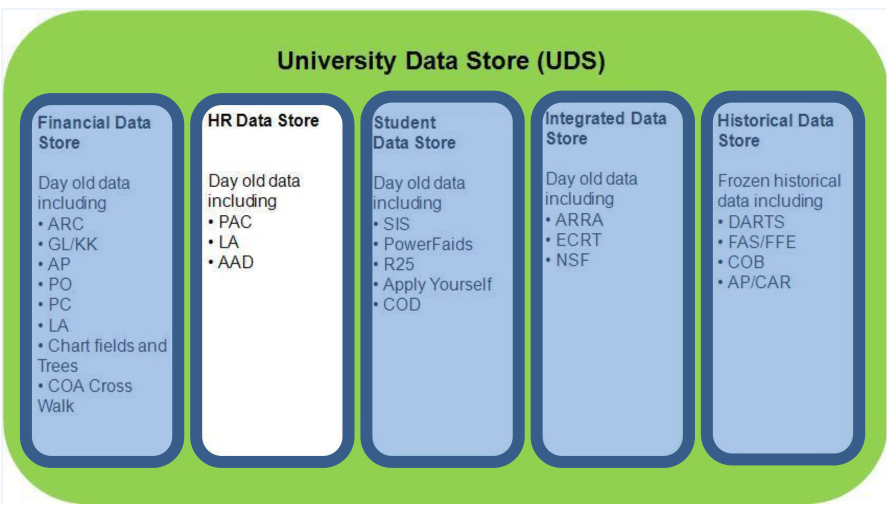
Columbia University streamlines the reporting environments into two repositories: ARC and the University Data Store (UDS).

ARC provides real-time access to financial data and the University Data Store (UDS) is the data warehouse repository, where data from ARC, PAC/LA, Student, and Historical/Legacy system data is stored.

Within the University Data Store (UDS) is the HR Data Store. The HR Data Store is the location of the HR Manager Reports. The data in the HR Data Store is "day old data". That is, running a report today displays information as of yesterday.

Each component of the University Data Store (UDS) contains its own suite of reports.

The reports in the HR Data Store are the focus of this course.



The University Data Store (UDS) is the data warehouse repository for Columbia University reports.

The UDS contains the:

- **Financial Data Store**
- **HR Data Store**
- **Student Data Store**
- **Integrated Data Store**
- **Historical Data Store**

HR Data Store Reports

Within the HR Data Store are many HR reports available to help you in managing your day to day activities. **The HR Manager Reports in the HR Data Store are the focus of this course**.

HR Data Reports

Below are the available reports:

1. Active Positions and Incumbents Report
2. Active Position Report
3. Casual Earnings – Prior July 2012 Only
4. Employee Personal and Job Data Report by Bargaining Unit
5. Employee Personal and Job Data Report by Job Function
6. Employee Personal Data Report by Bargaining Unit
7. Employee Personal Data Report by Job Function
8. Employee Vacation Accrual
9. Post-Docs Demographics Report
10. Salary Planning Report – *available May – July to users with e-Comp Report Access*
11. Support Staff Overtime Report – Prior July 2012 Only
12. Termination Report
13. Upcoming/ Past Appointment End Date Report
14. Upcoming/Past Visa/Permit Expiration Date Report

Labor Accounting Reports

These reports are also located in the HR Data Store and provide detail on Fringe Rates, Funding Setup, Payroll Information and Suspense Detail in a Department, Employee or Combo Code view.

Access to Labor Accounting Reports is provided to the following PAC roles:

- Manager Self-Service
- Manager Reporter
- Labor Accounting Approver

These reports are accessed via a separate link on the reporting portal on myColumbia. For training information on Labor Accounting and Reports, visit http://managers.hr.columbia.edu/tig/PAC/labor-accounting.

How to Generate an HR Manager Report

Step by Step

1. Sign on to myColumbia/HR Manager Resources/Reports
2. Click the “HR Manager Resources” link
3. Click the HR Manager Reports’ link below the ‘Reports’ section on the page
4. Access a report. Enter report parameters, if required
5. View the report
6. Save the report, if desired
7. Print the report, if needed

Note: This is a quick step by step guide, we will go through each of these steps in detail.

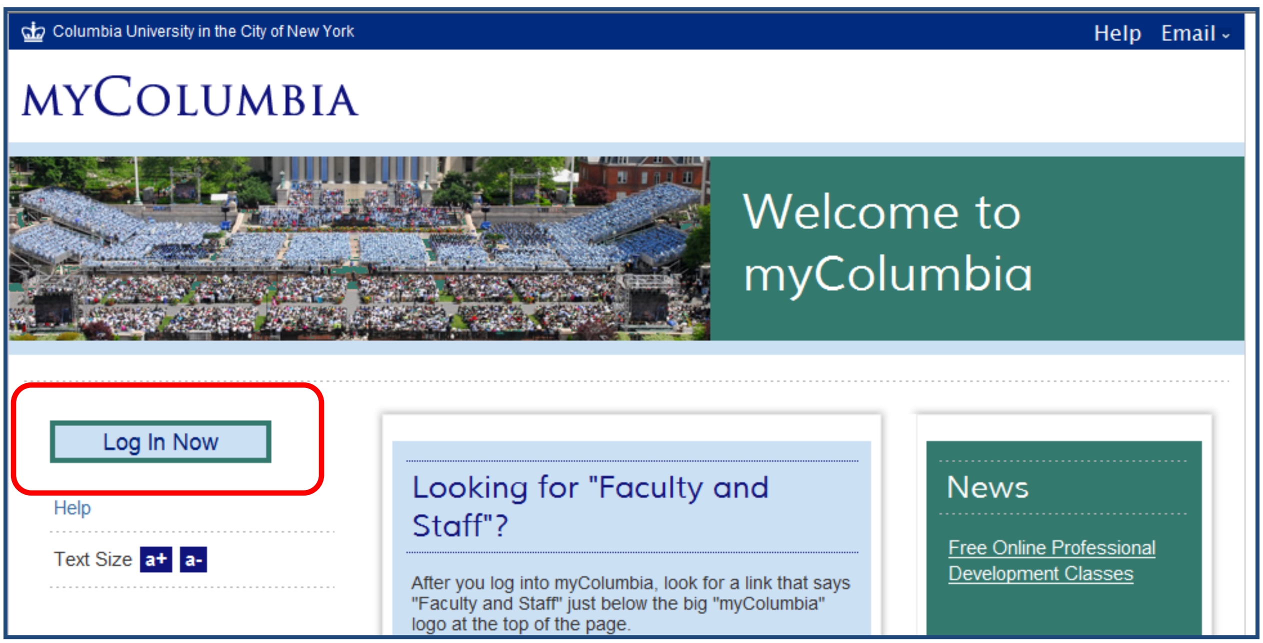
Generate an HR Manager Report

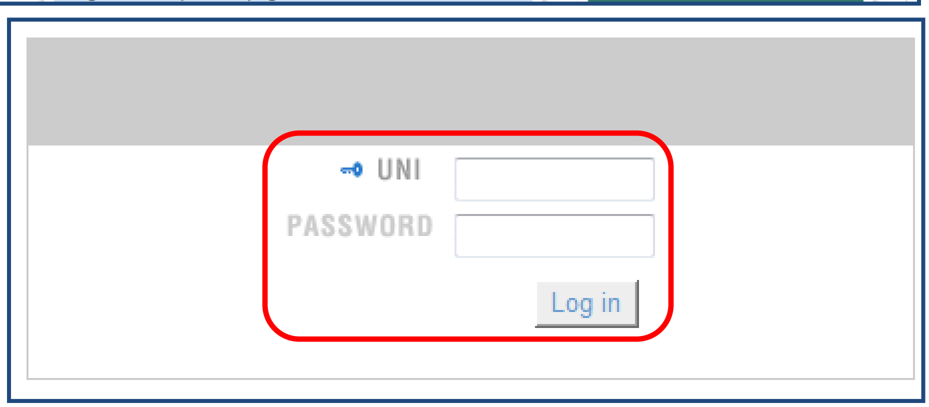
Step 1 – Sign on to myColumbia/HR Manager Resources/Reports

- Open your web browser
- Go to www.my.columbia.edu
- Click the Log In Now button
- Enter your UNI and Password
- Click the Log In button

You will be logged into myColumbia, a user interface that brings together access to key information and services into one common place.

Log in to myColumbia to access the Reporting Portal





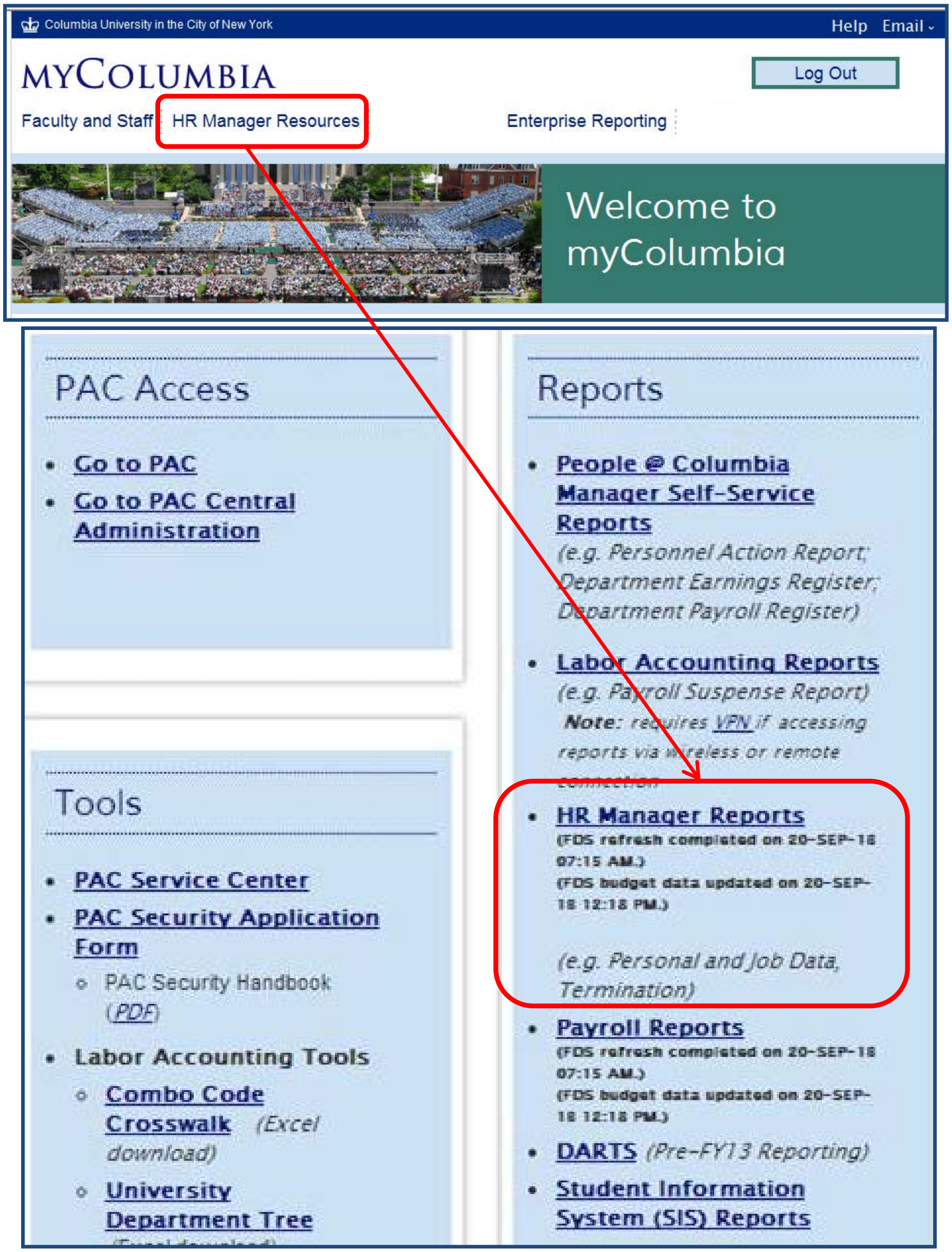
Generate an HR Manager Report, cont.

Step 2 – Access the HR Manager Resources Section

- Click the 'HR Manager Resources' link at the top of the page

Step 3 – Access the HR Manager Reports

- Click the 'HR Manager Reports' link below the 'Reports' section on the page. This is the new location for the HR Data Reports (the prior named Data Warehouse Reports)

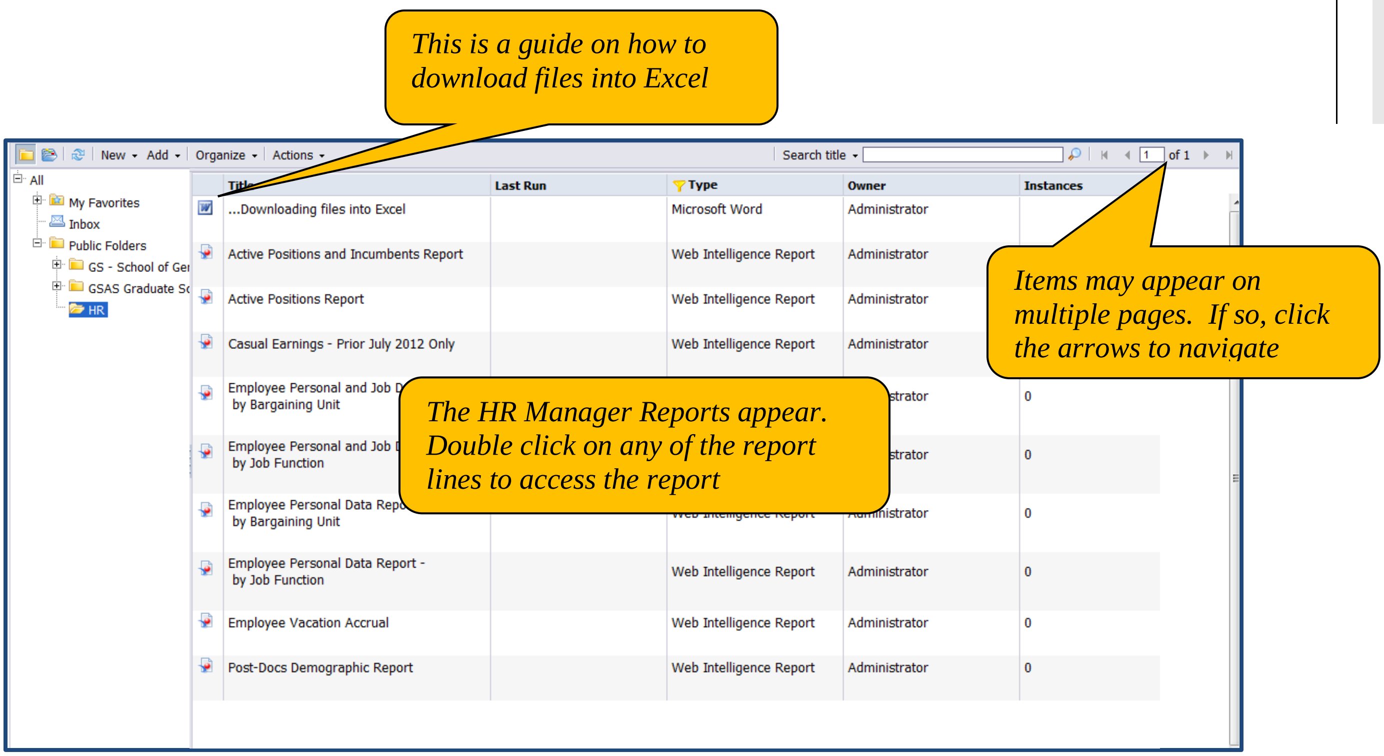


Generate an HR Manager Report, cont.

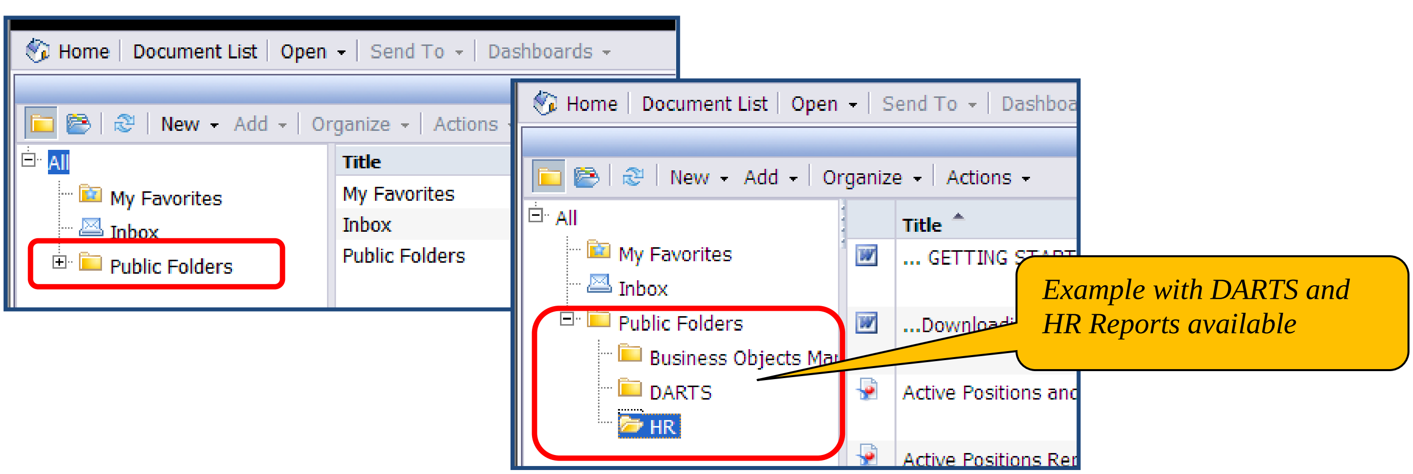
Step 4 – Access a report

All of the available reports for HR are displayed. To access a report, double-click the report and the report displays. The reports initially are displayed in HTML format and there are options to save the file in Excel, PDF or Comma delimited if you so choose.

- Double-click on a report



If the reports do not automatically display upon clicking the HR Manager Reports link, click the plus sign next to the 'Public Folders' link to expand the report types (available to you per your access) and then click the folder for the suite of reports you would like to see. Once a report area is selected, e.g. HR, the listing of available reports displays under the Title column.



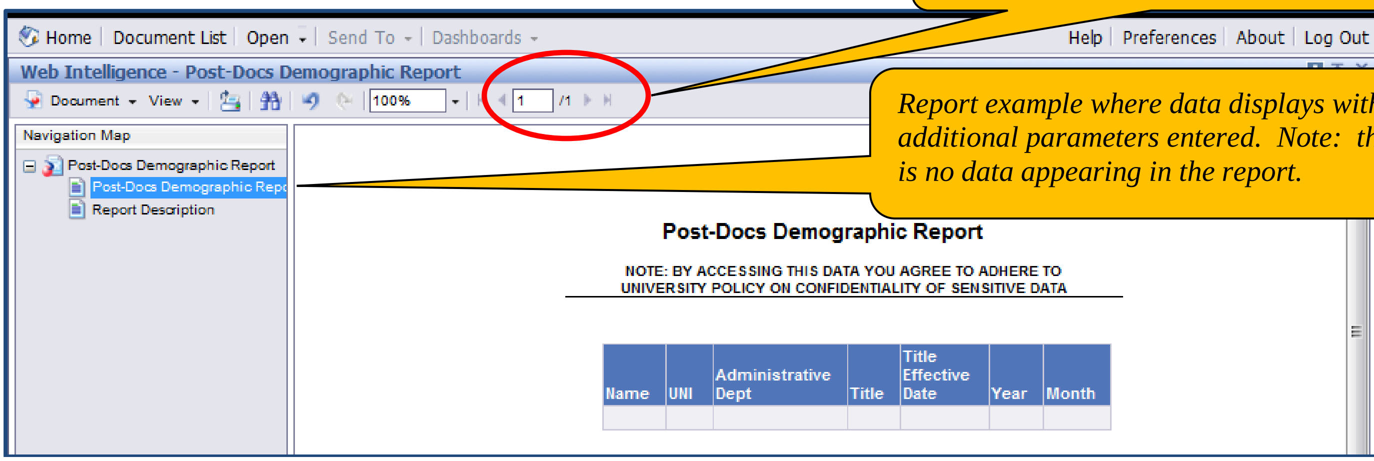
Generate an HR Manager Report, cont.

Step 5 – Viewing a report

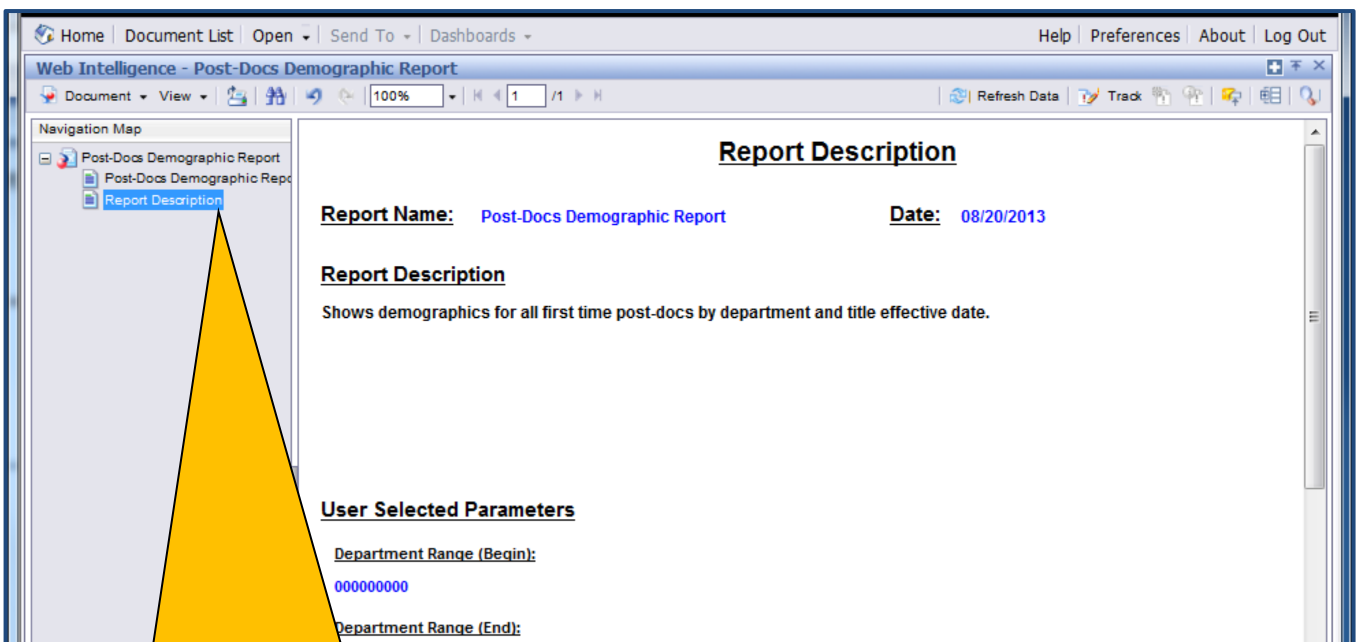
Once a report is selected, it either displays the information as a chart on the page or it will ask you to enter additional parameters. Below is an example of a report displaying information where no additional parameters need to be entered.

Each report also includes a 'Report Description' that provides a brief description of the report along with the parameters selected, if applicable. Click the 'Report Description' link on the left hand menu to display the description.

Click the arrows to page through reports if there are multiple pages.



Report example where data displays with additional parameters entered. Note: there is no data appearing in the report.



Click the Report Description link on the left hand menu to display the report description and user entered parameters, if any.

Generate an HR Manager Report, cont.

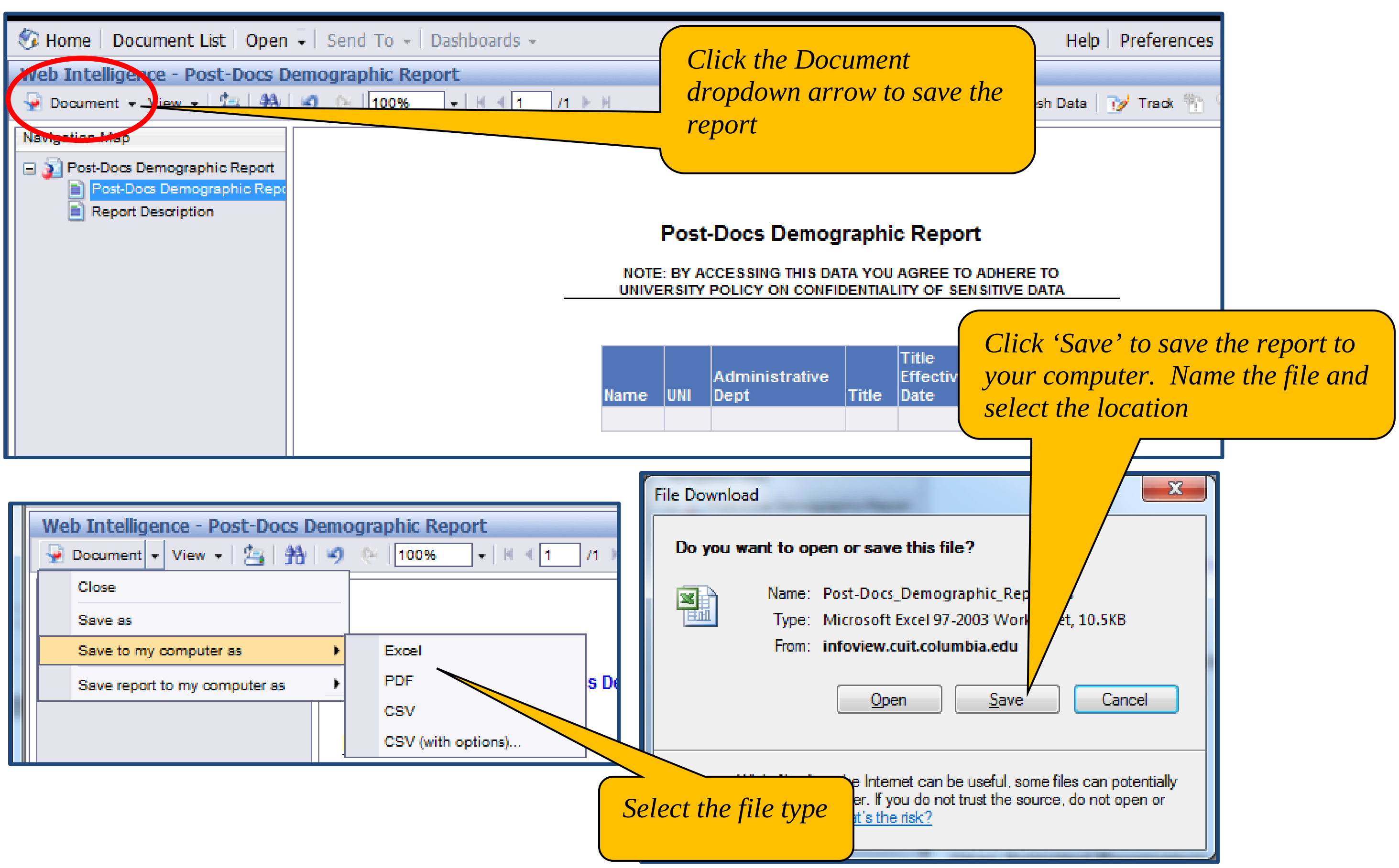
Step 6 – Saving a report

Use the document dropdown list to save the report to your computer.

- Click the drop down arrow next to 'Document'
- Select 'Save to my computer as'
- Select the file type (e.g. Excel, PDF or CSV)
- Click 'Save'
- Name the report and select the location on your computer to save it to

Before viewing, saving or printing a report, ensure that your IE Browser is set up to enable automatic prompting for file downloads. Check this option is selected by bringing up your Internet Explorer and following the links:

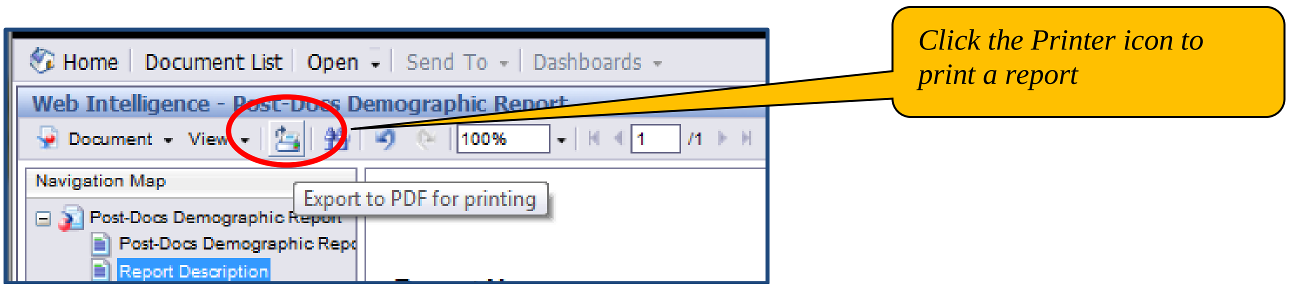
Tools-->Internet Options--Security Tab-->Click on Custom Level-->Downloads-->'Enable' the 'Automatic prompting for file downloads'.



Generate an HR Manager Report, cont.

Step 7 – Print a report

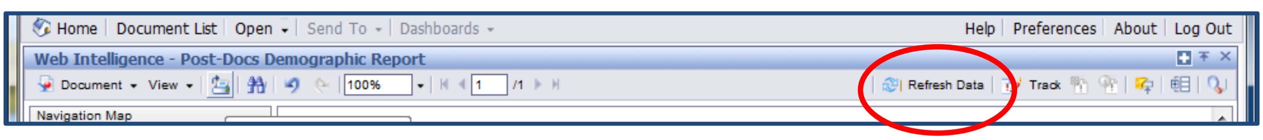
- Click on the Printer Icon on the menu bar. The output format is PDF.



Note: if you export the report into another format such as Excel, you may also print the report from that format.

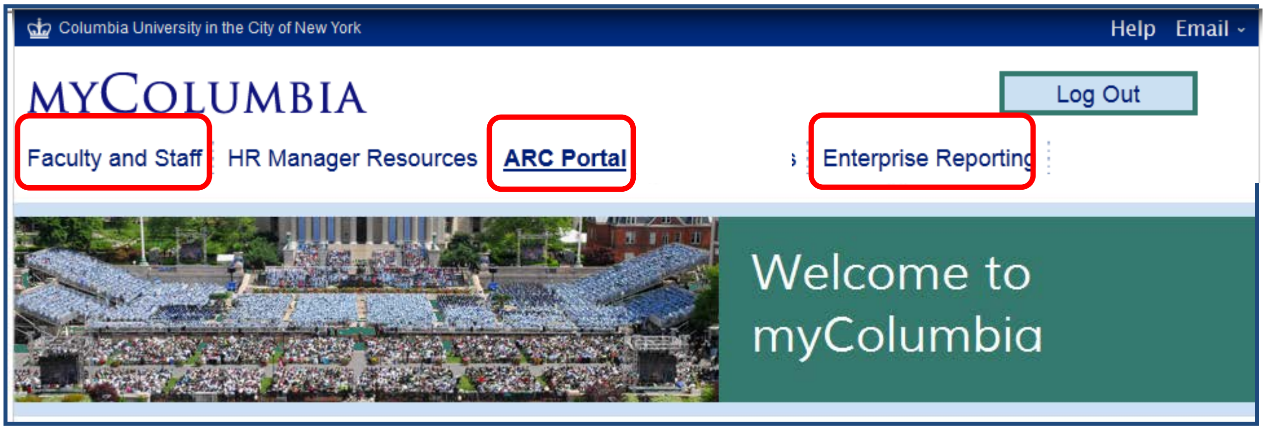
Note on the Refresh Data button

- On the screen is a ‘Refresh Data’ button located on the right hand side of the tool. As HR Manager Reports contain ‘day old data’, the information is updated nightly and clicking this button will not return any newer results.



Other myColumbia Portal Links

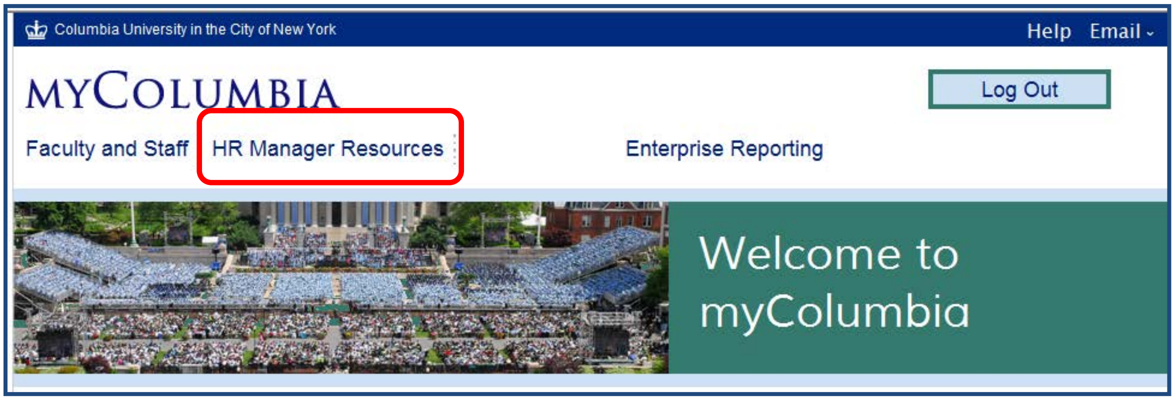
Before we explore the individual reports, let's review the additional links on myColumbia. Notice when you first logged in, additional links appears at the top of the screen. Access to sites is dependent upon your security authorization and thus which links appear for you. Each link provides access to a specific portal area. Let's explore the links to reporting areas within these other sites.



Other myColumbia Portal Links – HR Manager Resources

Additional reports are located within the Reports Section of the HR Manager Resources page.

- MSS, Labor Accounting Reports, HR Manager Reports, Payroll Reports and DARTS Reports are accessed from this page by clicking on those specific links within the Reports section on the page



Click here to access reports within the Manager Self-Service application.

Click here to access Labor Accounting reports.

Click here to access the HR Manager Reports and the training guide and job aid on how to use HR Manager Reports.

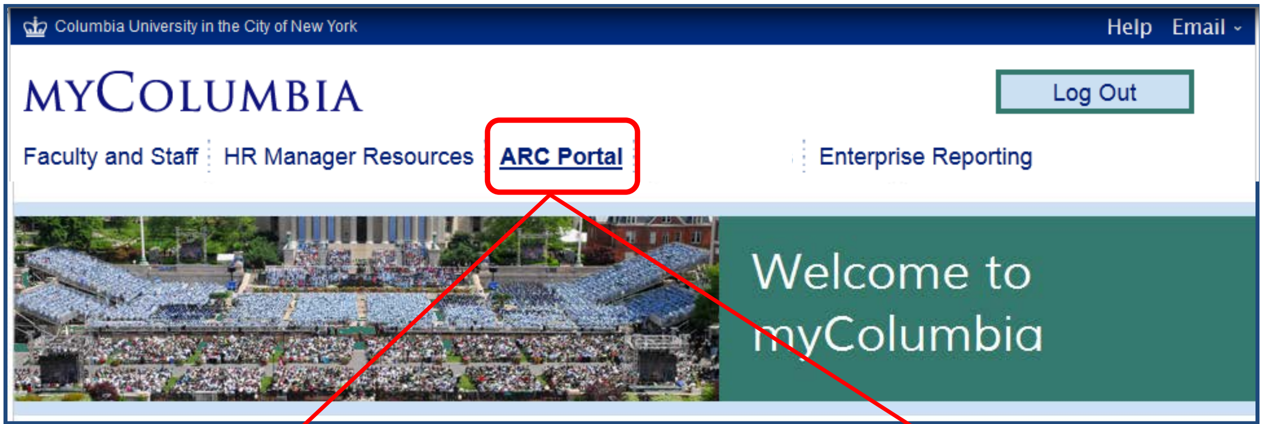
Note: The HR Manager Reports are also accessible via the Enterprise Reporting link.

Click here to access the Financial Data Store Payroll Reports.

Click here to access DARTS. Note: DARTS Reports are also accessible via the Enterprise Reporting and ARC links.

Other myColumbia Portal Links – ARC

Within the ARC section is a Reports section that provides real-time access to financial data. There is also a Legacy Reporting section.



The Reporting Quick Links section provides access to real-time financial reports.

The Legacy Reporting section provides access to DARTS and other Legacy Reports

Other myColumbia Portal Links – Enterprise Reporting

The HR Manager Reports are also located within the Enterprise Reporting Section of myColumbia along with other suites of reports available to you per your access.

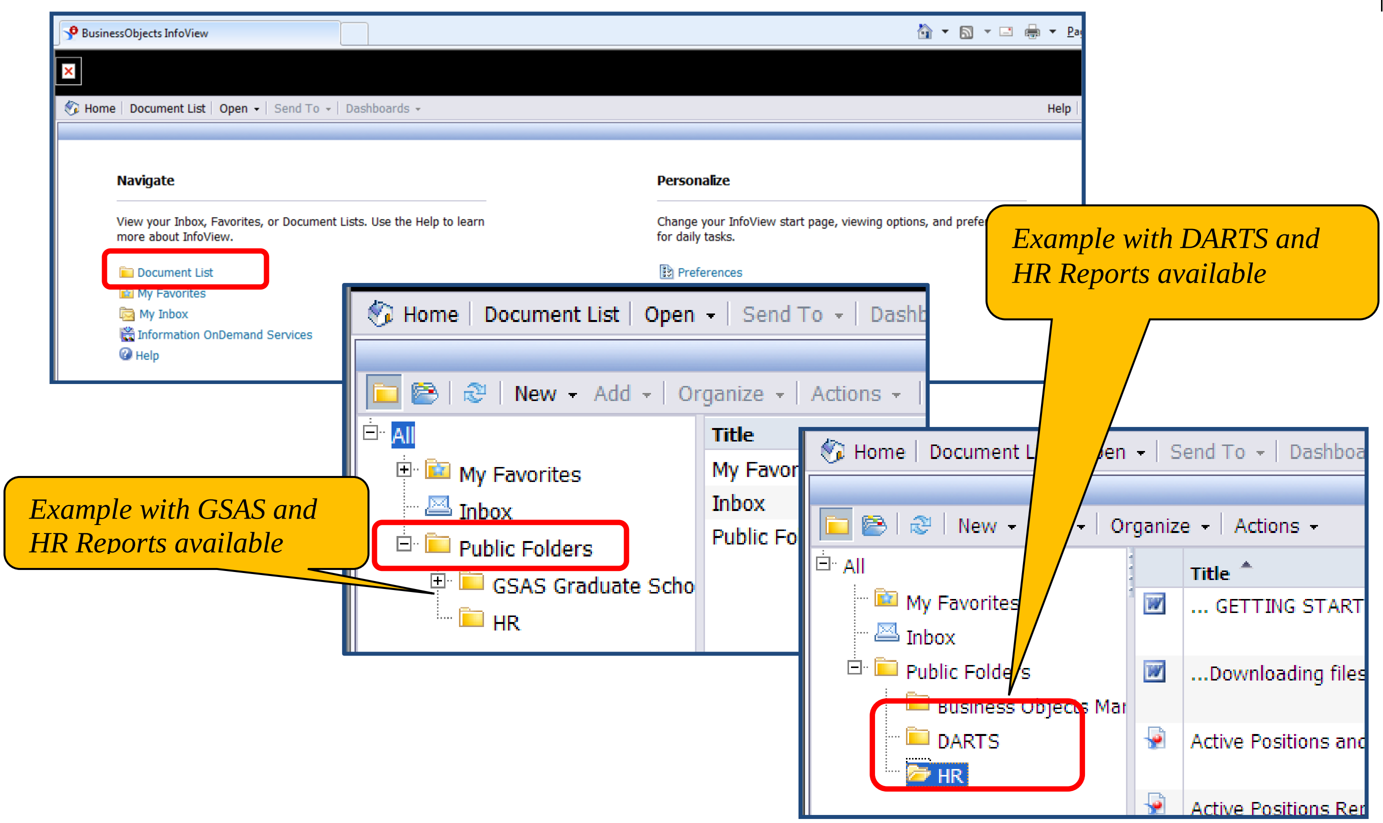
To access reports in the Enterprise Reporting section:

- o Click on the ‘Document List’ link under the Navigate section of the portal

This is the view of the reporting portal. Items are grouped into two sections on the page. The first section on the left is the list of areas where you can retrieve reports. The second section is the actual listing of reports.

- o Click the plus sign next to the ‘Public Folders’ link to expand the reports types
- o Click the folder of the suite of reports you would like to see

Once a report area is selected, e.g. HR, the listing of available reports displays under the Title column. **Note**: if you have access to other report areas, such as DARTS, they will appear in the Public Folder list.



Manager Self-Service (MSS) Reports

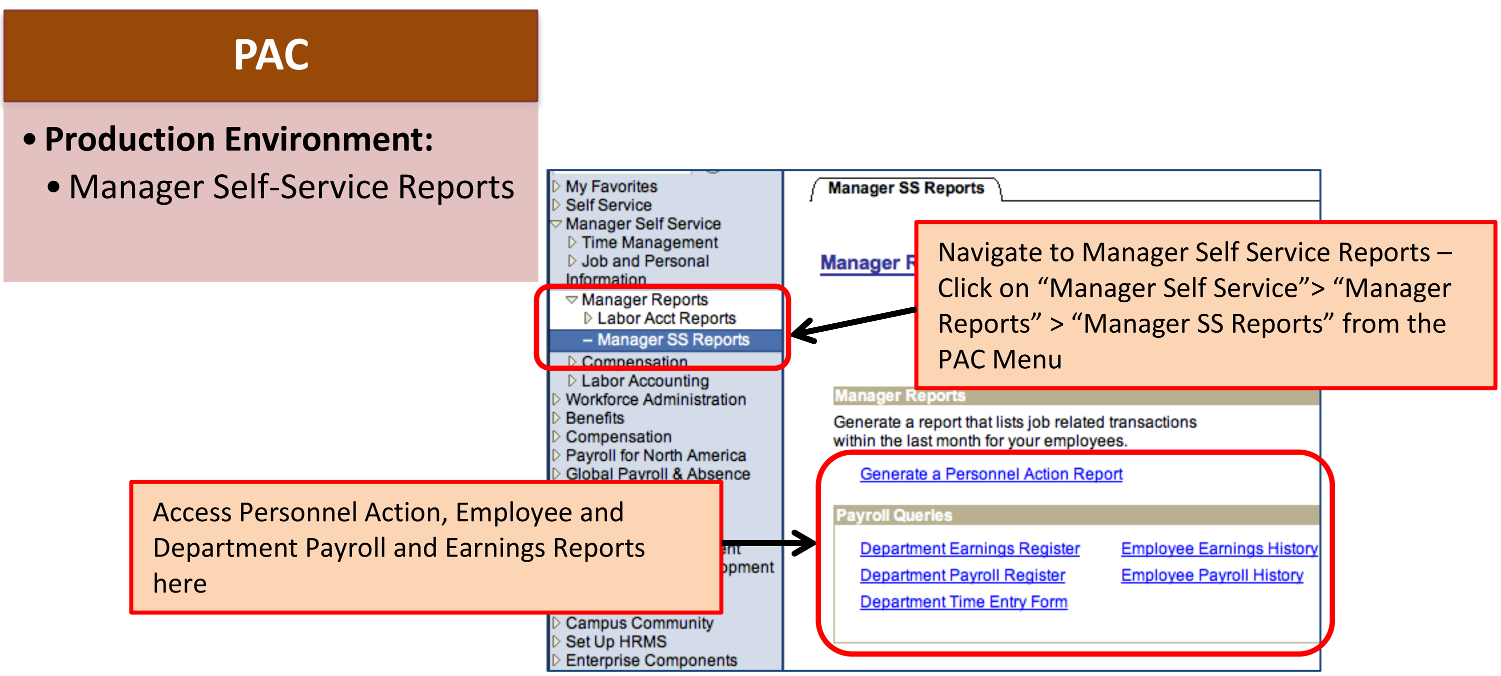
In addition to the reporting repositories, there is a production site within the PAC Manager Self-Service module where you can generate Manager Self-Service (MSS) Reports. MSS reports provide detail on Personnel Actions as well as Earnings and Payroll Information in a Department or Employee view.

Once you log in to the Manager Self-Service Reports portal on myColumbia, navigate to Manager Reports within the Manager Self-Service PAC Menu.

Access to MSS Reports is provided to the following PAC roles:

- Manager Self-Service
- Management Reporter

Refer to the Manager Self-Service Training Guide for information on generating these reports.



HR Manager Reports

Now let's review each of the available HR Manager Reports and how to access and view the reports.

Active Positions and Incumbents Report

Report Description

This report displays all active University positions (vacant or filled) and the names of staff filling any of the positions.

Report Use

This report is useful to see all of the open positions in a department and who occupies those positions. Position numbers can be obtained which are needed when entering a new hire in the Template-Based Hire application. It also helps if you need to reclassify a position. Note: work with your HR Client Manager when discussing position changes.

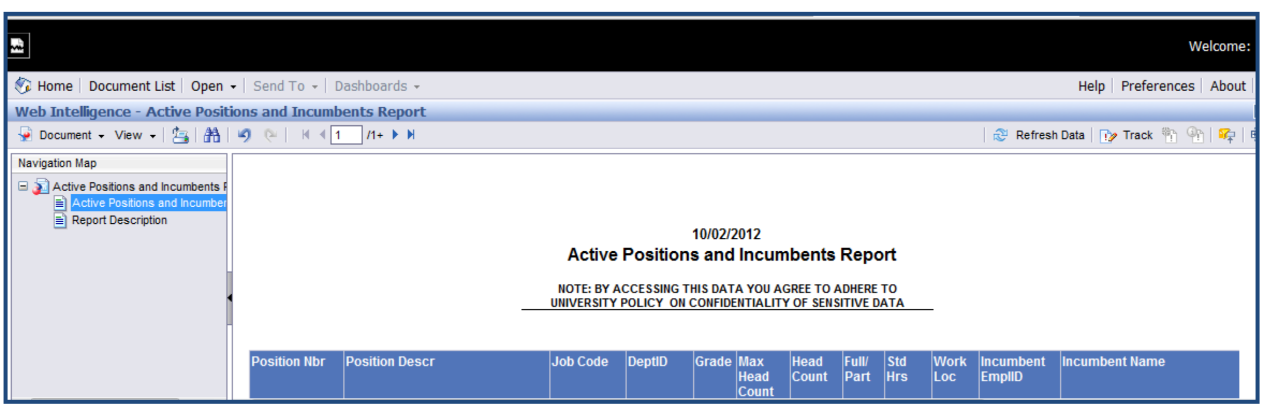
Report Parameters

This report does not require entry of additional parameters.

Report Results

The report results show:

- Position Number
- Position Description
- Job Code
- Department ID
- Grade
- Max Head Count
- Head Count
- Full/Part Time
- Std Hours
- Work Location
- Incumbent Employee ID
- Incumbent Name



Active Positions Report

Report Description

This report displays all active University positions that are vacant or filled.

Report Use

This report is useful to see all of the open positions in a department. In this version, you will not see the names of the employees who occupy the positions. Position numbers can be obtained which are needed when entering a new hire in the Template-Based Hire application. It also helps if you need to reclassify a position. Note: work with your HR Client Manager when discussing position changes.

Report Parameters

This report does not require entry of additional parameters.

Report Results

The report results show:

- Position Number
- Position Description
- Job Code
- Department ID
- Grade
- Max Head Count
- Head Count
- Full/Part Time
- Std Hours
- Work Location

Casual Earnings Report– Prior July 2012 Only

Report Description

This report displays the earnings and position related data for all casual employees in the selected administrative department(s) as recorded on PAC.

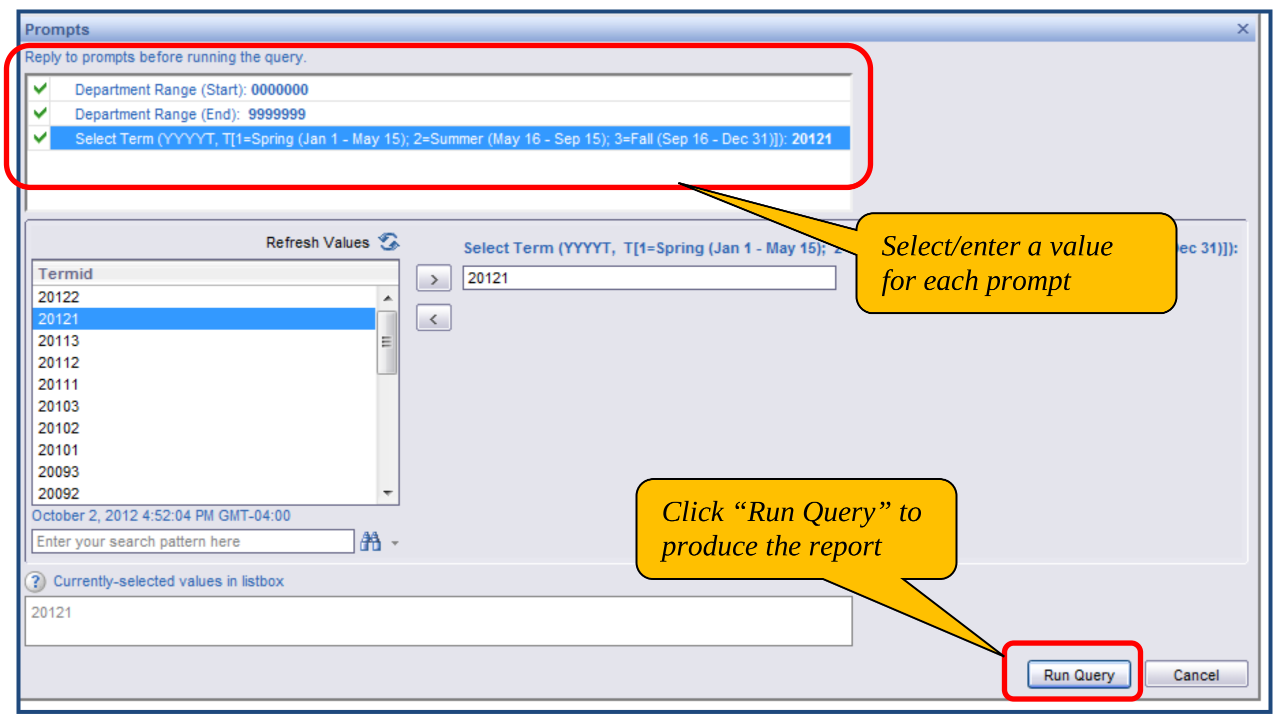
Report Use

This report is useful when checking a casual employee's earnings to the check actuals. Note: this report does not provide the number of hours a casual employee worked. That information is provided in the "560 Report" that is pushed via email.

Report Parameters

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires three prompts to be entered. Click on each value to select and then click on the "Run Query" button on the bottom of the screen.

- Department Range (Start)
- Department Range (End)
- Select Term



Casual Earnings Report, cont.

Department Range (Start & End):

Each user has a listing of his\her Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

Click on the “Department Range” (Start) and “Department Range (End)” lines on the top of the screen. After clicking each line, enter the seven-digit department number in the text box in the middle of the screen.

If you use the Default settings (0000000) and (9999999) you will get all your departments and associated information.

If you choose to limit the department list you can do so by clicking the **Refresh Values** options within the sub-window then double-clicking on the desired Department value.

Note: When selecting or entering department numbers for dates *prior to July 16, 2012*, use the department number structure in use at that time, e.g. 0120000. When selecting or entering department numbers for dates *post July 16, 2012*, use the department number structure currently in use, e.g. 160600X.

Select Term

Click on the “Select Term” line on the top of the screen. After clicking this line, select the school term in the middle of the screen and then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added.

Once the parameter prompts are answered, click the **Run Query** button to retrieve the report results.

The Casual Earnings Report will display the information based on your selected criteria.

Report Results

The report results show:

- Position Number
- Title
- Bargaining Unit
- Bargaining Name
- Term
- Fiscal Year
- Admin Department
- Position Department
- Name
- Employee ID
- Fiscal YTD Earnings
- Quarter
- Month in Quarter
- Quarter Earnings

Employee Personal and Job Data Report– by Bargaining Unit

Report Description

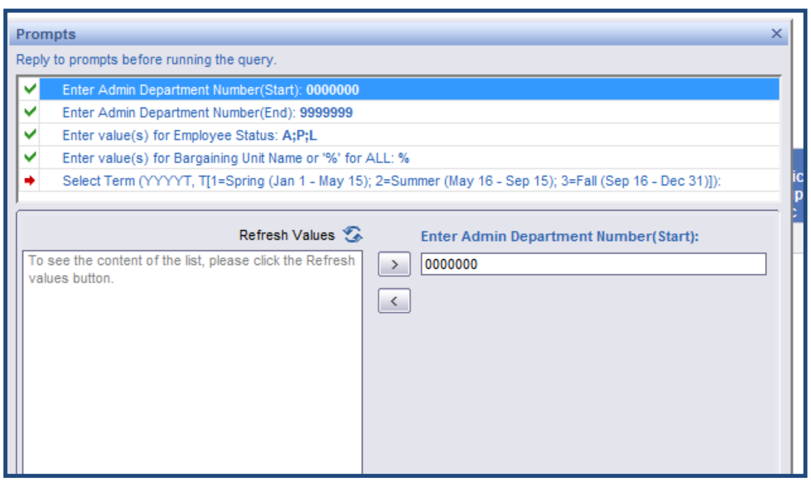
This report displays comprehensive personal and position related data for University employees in the selected administrative department(s) and bargaining unit(s) as recorded on PAC.**Report Use**

This report is useful when additional personal or job data not available in Manager Self-Service is needed.

Report Parameters

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires five prompts to be entered. Click on each value to select and then click on the "Run Query" button on the bottom of the screen.

- Admin Department Number (Start)
- Admin Department Number (End)
- Employee Status
- Bargaining Unit Name (or use % for ALL)
- Select Term



Admin Department Number (Start & End):

Each user has a listing of his\her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

Click on the "Department Range" (Start) and "Department Range (End)" lines on the top of the screen. After clicking each line, enter the seven-digit department number in the text box in the middle of the screen.

If you use the Default settings (0000000) and (9999999) you will get all your departments and associated information.

If you choose to limit the department list you can do so by clicking the **Refresh Values** options within the sub-window then double-clicking on the desired Department value.

Employee Personal and Job Data Report– by Bargaining Unit, cont.

Employee Status:

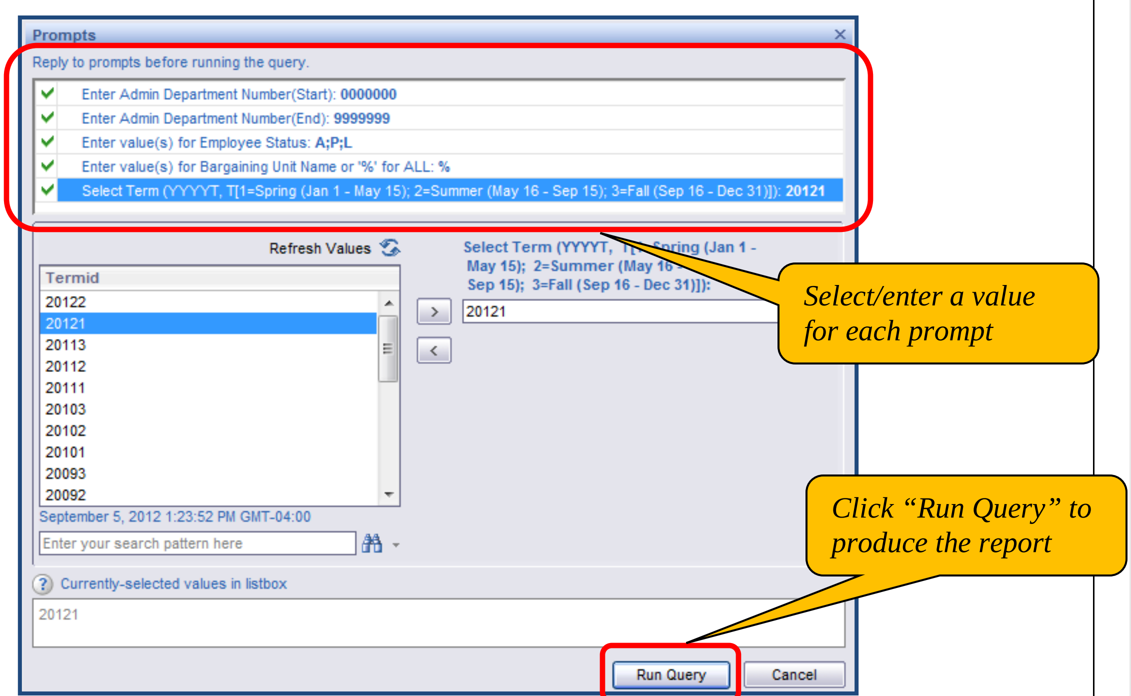
Click on the “Employee Status” line on the top of the screen. After clicking this line, the three employee statuses, A = Active; P = Part Time; L = Leave of Absence, display in the middle of the screen and are selected. To remove one of the statuses, click the status letter in the middle right hand side box and then click the left facing arrow to remove the selection.

Bargaining Unit:

Click on the “Bargaining Unit” line on the top of the screen. The “%” sign appears as the selection. Use “%” to select all Bargaining Units. If you choose to limit the Bargaining Units you can do so by clicking the **Refresh Values** options within the sub-window then double-clicking on the desired Bargaining Unit. After clicking this line, select the Bargaining Unit in the middle of the screen. Then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added.

Select Term:

Click on the “Select Term” line on the top of the screen. After clicking this line, select the school term in the middle of the screen and then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added.



Employee Personal and Job Data Report– by Bargaining Unit, cont.

Report Results

The report results show:

- Employee ID
- Admin Department Name, Admin Department Number
- Employee Name, Position Department Name, Position Department Number
- UNI
- Original Hire Date, Service Date
- First Tenure Position Date
- CU Employee Status
- Gender
- DOB
- Ethnic Group, Ethnic Group Description
- Highest Degree, Degree Name, Degree Year, Degree Institution
- Home ZIP
- Extract Date
- Email
- Office Address Line 1, Line 2, Line 3, City, State and Zip Code
- Office Phone Number
- Term Year, Term Code
- Position Number, Position Status, Position Status Description
- Work Location, Work Location Description
- US Citizen, Visa Type Code, Visa Expiration Date
- Tenure Status, Tenure Status Description, Tenure Date
- Active Positions
- Benefits Eligible
- Position Entry Date
- Appointment End Date
- Job Code, Job Description, Job Effective Date, Job Function, Job Family, Job Family Description
- Academic Rank, Academic Rank 1, Academic Rank 2
- Grade
- Comp Rate, Comp Rate End Date, Compensation Frequency, Compensation Frequency Description
- Weekly Hours
- Bargaining Unit, Bargaining Unit Description
- Sabbat End Date
- FT/PT Status
- Multiple Positions
- Action Type, Action Reason, Action Reason Description, Action Effective Date
- Position Date Extract Date
- Term ID
- Position Title
- Contract Period Salary

Employee Personal and Job Data Report– by Job Function

Report Description

This report displays comprehensive personal and position related data for University employees in the selected administrative department(s) and job function(s) as recorded on PAC.

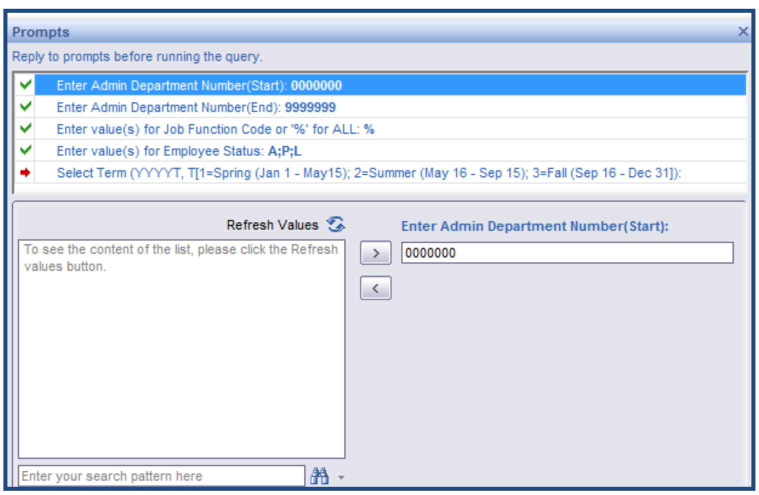
Report Use

This report is useful when additional personal or job data not available in Manager Self-Service is needed.

Report Parameters

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires five prompts to be entered. Click on each value to select and then click on the “Run Query” button on the bottom of the screen.

- Admin Department Number (Start)
- Admin Department Number (End)
- Job Function (or use % for ALL)
- Employee Status
- Select Term



Admin Department Number (Start & End):

Each user has a listing of his\her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

Click on the “Admin Department Number (Start)” and “Admin Department Number (End)” lines on the top of the screen. After clicking each line, enter the seven-digit department number in the text box in the middle of the screen.

If you use the Default settings (0000000) and (9999999) you will get all your departments and associated information.

If you choose to limit the department list you can do so by clicking the **Refresh Values** options within the sub-window then double-clicking on the desired Department value.

Employee Personal and Job Data Report– by Job Function, cont.

Job Function:

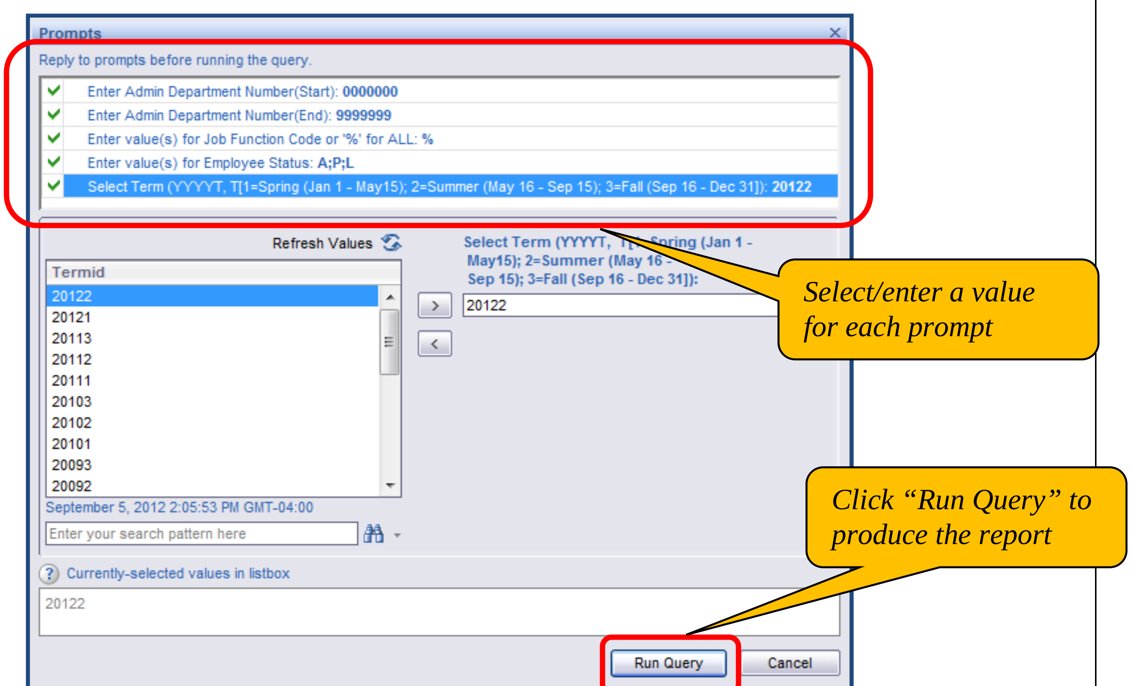
Click on the “Job Function” line on the top of the screen. After clicking this line, click the **Refresh Values** options within the sub-window then click on the desired Job Function (01, 11, 21, 31, 41, 51, or 61) in the middle of the screen. Then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added. Use the “%” to select all job functions.

Employee Status:

Click on the “Employee Status” line on the top of the screen. After clicking this line, the three employee statuses, A = Active; P = Part Time; L = Leave of Absence, display in the middle of the screen and are selected. To remove one of the statuses, click the status letter in the middle right hand side box and then click the left facing arrow to remove the selection.

Select Term:

Click on the “Select Term” line on the top of the screen. After clicking this line, select the school term in the middle of the screen and then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added.



Employee Personal and Job Data Report– by Job Function, cont.

Report Results

The report results show:

- Employee ID
- Admin Department Name, Admin Department Number
- Employee Name, Position Department Name, Position Department Number
- UNI
- Original Hire Date, Service Date
- First Tenure Position Date
- CU Employee Status
- Gender
- DOB
- Ethnic Group, Ethnic Group Description
- Highest Degree, Degree Name, Degree Year, Degree Institution
- Home ZIP
- Extract Date
- Email
- Office Address Line 1, Line 2, Line 3, City, State and ZIP Code
- Office Phone Number
- Term Year, Term Code
- Position Number, Position Status, Position Status Description
- Work Location, Work Location Description
- US Citizen, Visa Type Code, Visa Expiration Date
- Tenure Status, Tenure Status Description, Tenure Date
- Active Positions
- Benefits Eligible
- Position Entry Date
- Appointment End Date
- Job Code, Job Description, Job Effective Date, Job Function, Job Family, Job Family Description
- Academic Rank, Academic Rank 1, Academic Rank 2
- Grade
- Comp Rate, Comp Rate End Date, Compensation Frequency, Compensation Frequency Description
- Weekly Hours
- Bargaining Unit, Bargaining Unit Description
- Sabbat End Date
- FT/PT Status
- Multiple Positions
- Action Type, Action Reason, Action Reason Description, Action Effective Date
- Position Date Extract Date
- Term ID
- Position Title
- Contract Period Salary

Employee Personal Data Report– by Bargaining Unit

Report Description

This report displays comprehensive personal data for University employees in the selected administrative department(s) and bargaining unit(s) as recorded on PAC.

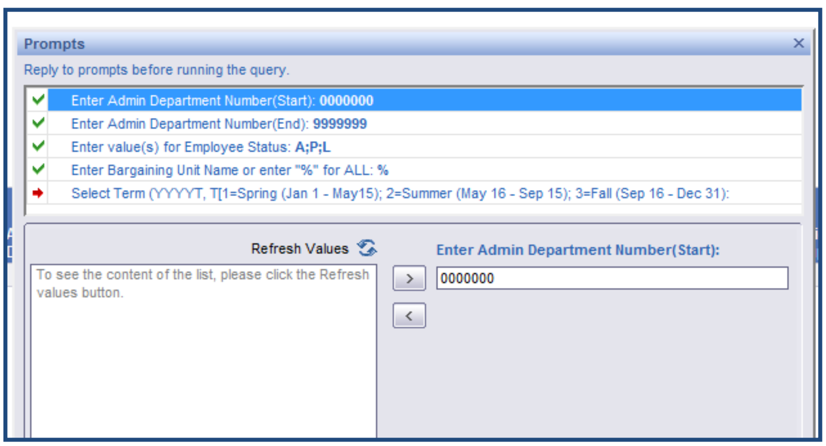
Report Use

This report is useful when additional personal or job data not available in Manager Self-Service is needed.

Report Parameters

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires five prompts to be entered. Click on each value to select and then click on the "Run Query" button on the bottom of the screen.

- Admin Department Number (Start)
- Admin Department Number (End)
- Employee Status
- Bargaining Unit Name (or use % for ALL)
- Select Term



Admin Department Number (Start & End):

Each user has a listing of his\her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

Click on the "Department Range" (Start) and "Department Range (End)" lines on the top of the screen. After clicking each line, enter the seven-digit department number in the text box in the middle of the screen.

If you use the Default settings (0000000) and (9999999) you will get all your departments and associated information.

If you choose to limit the department list you can do so by clicking the **Refresh Values** options within the sub-window then double-clicking on the desired Department value.

Employee Personal Data Report– by Bargaining Unit, cont.

Employee Status:

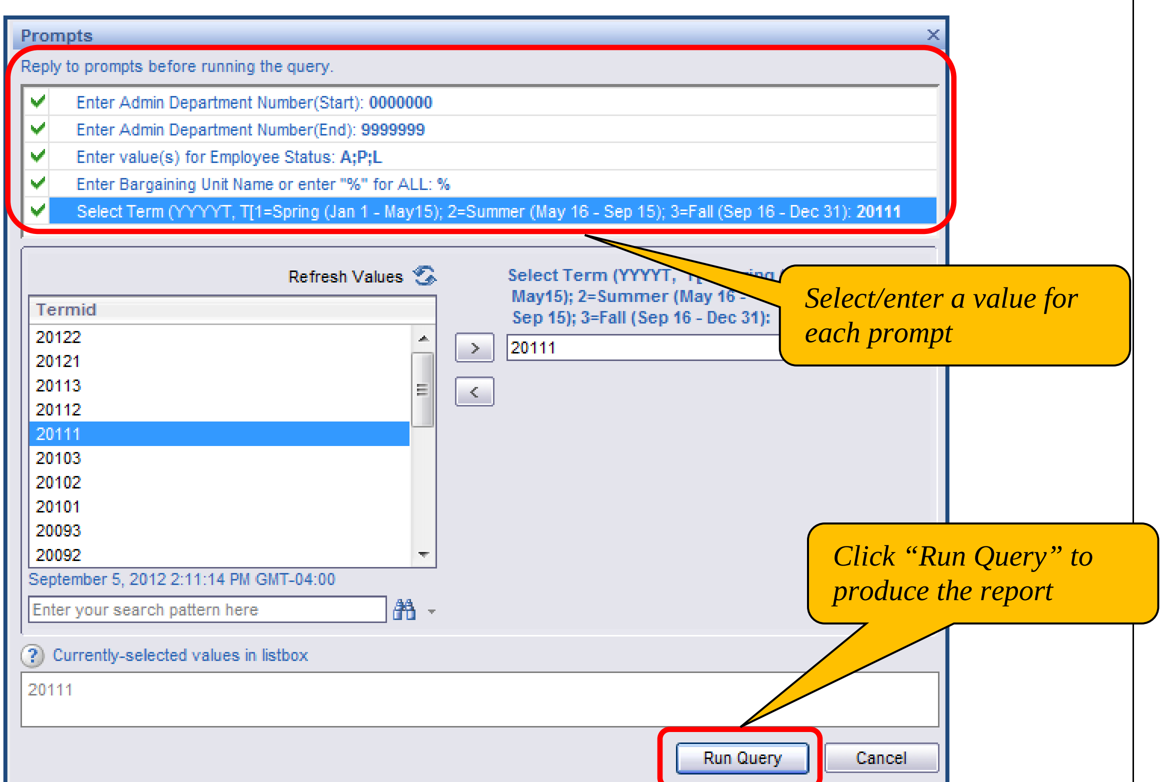
Click on the "Employee Status" line on the top of the screen. After clicking this line, the three employee statuses, A = Active; P = Part Time; L = Leave of Absence, display in the middle of the screen and are selected. To remove one of the statuses, click the status letter in the middle right hand side box and then click the left facing arrow to remove the selection.

Bargaining Unit:

Click on the "Bargaining Unit" line on the top of the screen. The "%" sign appears as the selection. Use "%" to select all Bargaining Units. If you choose to limit the Bargaining Units you can do so by clicking the **Refresh Values** options within the sub-window then double-clicking on the desired Bargaining Unit. After clicking this line, select the Bargaining Unit in the middle of the screen. Then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added.

Select Term:

Click on the "Select Term" line on the top of the screen. After clicking this line, select the school term in the middle of the screen and then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added.



Employee Personal Data Report– by Bargaining Unit, cont.

Report Results

The report results show:

- Employee ID
- Admin Department Name, Admin Department Number
- Employee Name, Position Department Name, Position Department Number
- Bargaining Unit
- UNI
- Original Hire Date, Seniority Date
- First Tenure Position Date
- CU Employee Status
- Gender
- DOB
- Ethnic Group, Ethnic Group Description
- Highest Degree, Degree Name, Degree Year, Degree Institution
- Home ZIP
- Extract Date
- Email
- Office Address Line 1, Line 2, Line 3, City, State and Zip Code
- Office Phone Number

Employee Personal Data Report– by Job Function

Report Description

This report displays comprehensive personal and position related data for University employees in the selected administrative department(s) and job function(s) as recorded on PAC.

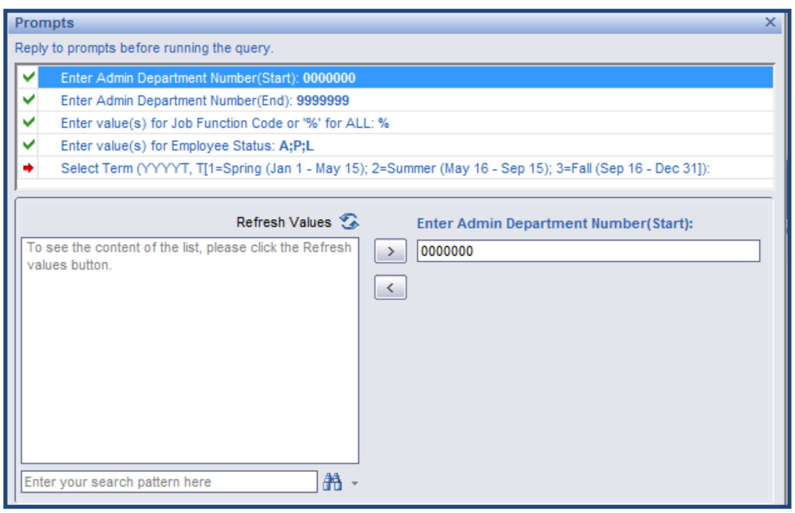
Report Use

This report is useful when additional personal or job data not available in Manager Self-Service is needed.

Report Parameters

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires five prompts to be entered. Click on each value to select and then click on the "Run Query" button on the bottom of the screen.

- Admin Department Number (Start)
- Admin Department Number (End)
- Job Function (or use % for ALL)
- Employee Status
- Select Term



Admin Department Number (Start & End):

Each user has a listing of his\her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

Click on the "Department Range" (Start) and "Department Range (End)" lines on the top of the screen. After clicking each line, enter the seven-digit department number in the text box in the middle of the screen.

If you use the Default settings (0000000) and (9999999) you will get all your departments and associated information.

If you choose to limit the department list you can do so by clicking the **Refresh Values** options within the sub-window then double-clicking on the desired Department value.

Employee Personal Data Report– by Job Function, cont.

Job Function:

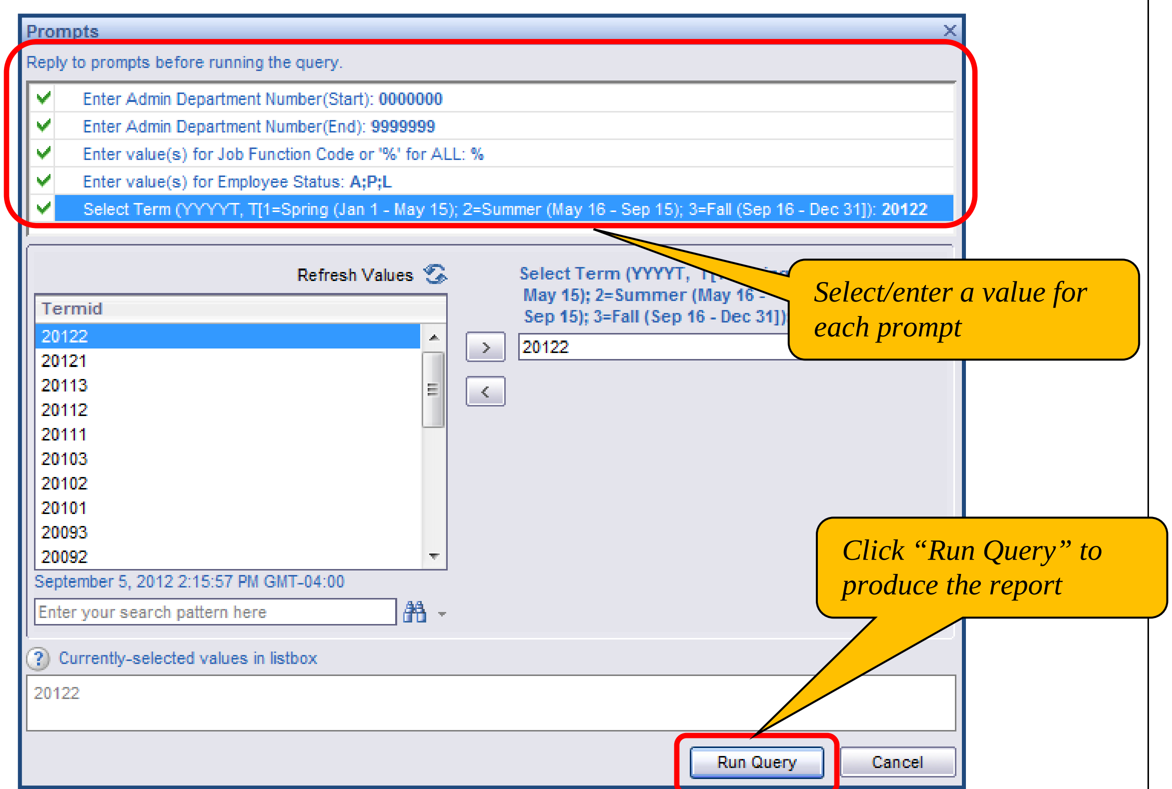
Click on the "Job Function" line on the top of the screen. After clicking this line, click the **Refresh Values** options within the sub-window then click on the desired Job Function (01, 11, 21, 31, 41, 51, or 61) in the middle of the screen. Then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added. Use the "%" to select all job functions.

Employee Status:

Click on the "Employee Status" line on the top of the screen. After clicking this line, the three employee statuses. A = Active; P = Part Time; L = Leave of Absence, display in the middle of the screen and are selected. To remove one of the statuses, click the status letter in the middle right hand side box and then click the left facing arrow to remove the selection.

Select Term:

Click on the "Select Term" line on the top of the screen. After clicking this line, select the school term in the middle of the screen and then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added.



Employee Personal Data Report– by Job Function, cont.

Report Results

The report results show:

- Employee ID
- Admin Department Name, Admin Department Number
- Employee Name
- Position Department, Position Department Name, Position Number
- Position Title, Bargaining Unit
- UNI
- Original Hire Date, Seniority Date
- First Tenure Position Date
- CU Employee Status
- Gender
- DOB
- Ethnic Group, Ethnic Group Description
- Highest Degree, Degree Name, Degree Year, Degree Institution
- Home ZIP
- Extract Date
- Email
- Office Address Line 1, Line 2, Line 3, City, State and ZIP Code
- Office Phone Number

Employee Vacation Accrual Report

Report Description

This report displays the employees to be included in the Year End Vacation Accrual Report exercise. It is a preliminary list that should be reviewed for any changes.

Report Use

This report is useful to gather employee information in preparation for the Year End Vacation Accrual Report exercise. This is a preliminary list of employees and should be reviewed for any changes. This data is refreshed every June in preparation for this exercise.

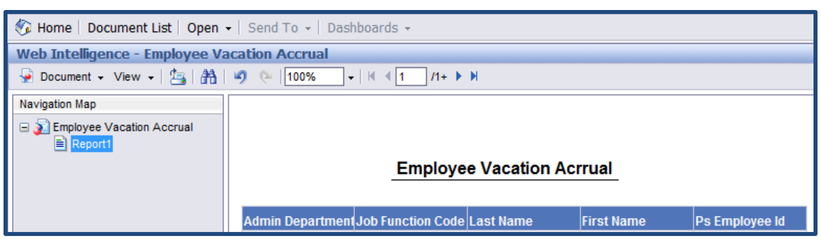
Report Parameters

This report does not require entry of additional parameters.

Report Results

The report results show:

- Admin Department
- Job Function Code
- Last Name
- First Name
- Ps Employee ID



Post-Docs Demographic Report

Report Description

This report displays demographic data for all first time post-docs by department and title effective date.

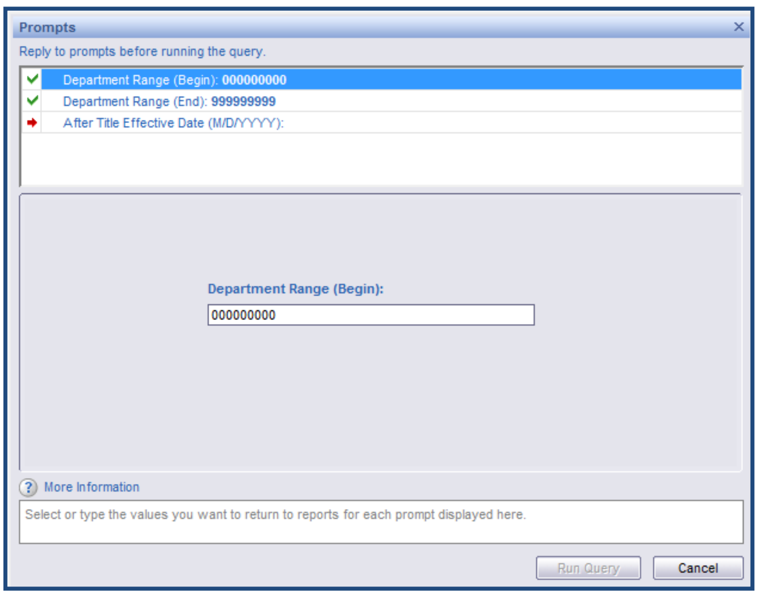
Report Use

This report is useful to obtain post-doc data.

Report Parameters

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires three prompts to be entered. Click on each value to select and then click on the "Run Query" button on the bottom of the screen.

- Department Range (Begin)
- Department Range (End)
- After Title Effective Date



Department Range (Begin & End):

In this report, the department numbers must be entered.

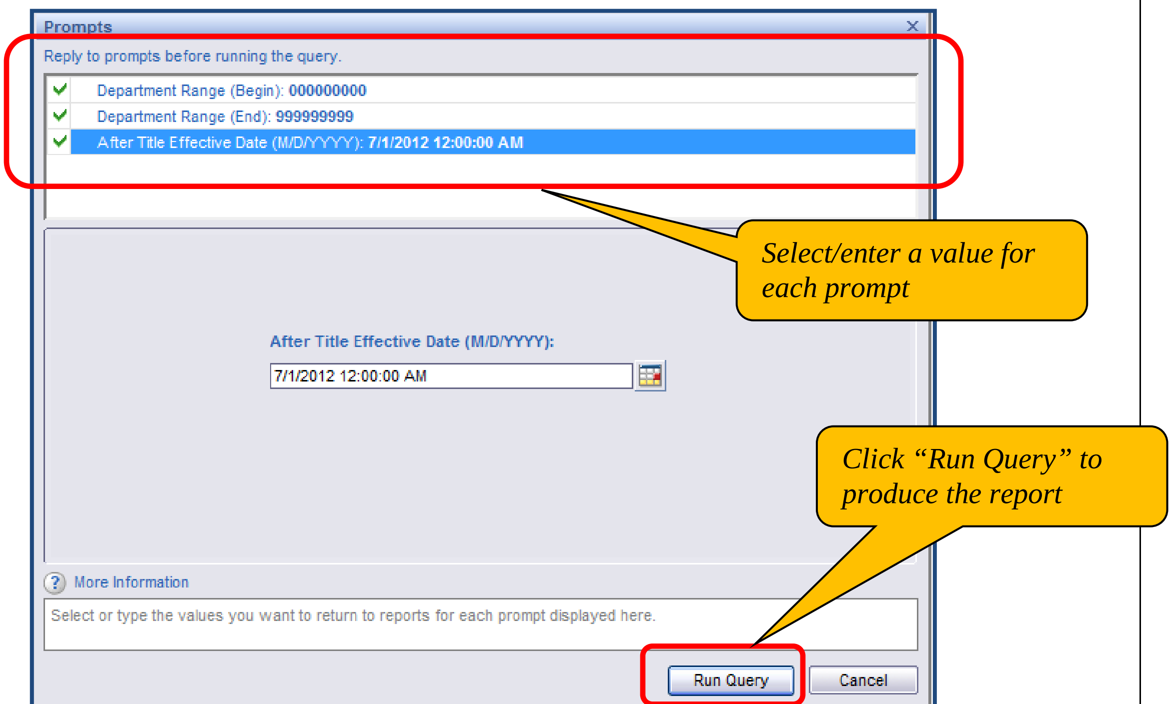
Click on the "Department Range" (Start) and "Department Range (End)" lines on the top of the screen. After clicking each line, enter the seven-digit department number in the text box in the middle of the screen.

If you use the Default settings (0000000) and (9999999) you will get all your departments and associated information.

Post-Docs Demographic Report, cont.

After Title Effective Date:

Click on the "After Title Effective Date" line on the top of the screen. After clicking this line, click the calendar icon to the right hand side of the text box in the middle of the screen to display the calendar. From there, click on the arrows in the calendar to navigate to the date. Click on the day in the month and year and the date will appear.



Report Results

The report results show:

- Name
- UNI
- Administrative Department Name
- Title
- Title Effective Date
- Year
- Month

Salary Planning Report

<u>Report Description</u>

This report displays salary data for University employees in the selected administrative department(s). This report is only viewable by those who have the Enhanced Manager Self-Service security access with E-Comp/Salary Reporting and is only available from May – July.

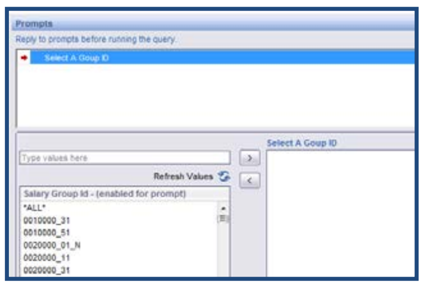
<u>Report Use</u>

This report is useful when preparing for and administering the e-Comp process.

<u>Report Parameters</u>

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires one prompt to be entered. Select the department/job function code(s) in the middle of the screen. Then click the right facing arrow to make the selection and then click on the "Run Query" button.

- Select a Salary Group ID



Salary Group ID:

In this report, the department numbers/job function codes must be selected and moved into the box on the right hand side.

Scroll through the listings on the left hand side and click to select the department/job function code(s). Then click the right facing arrow to make the selection.

<u>Report Results</u>

The report results show:

- Employee ID, Employee Record Number
- Name
- Administrative Department, Position Department
- Title
- Tenure Status
- Grade
- E-Comp Status
- Visa Expiration Date
- Current Annual Rate, Change Amount
- New Annual Rate, Change Percent
- Group ID
- Updated, Submitted

Support Staff Overtime Earnings Report – Prior July 2012 Only

Report Description

This report displays overtime earnings and position related data for Support Staff employees in the selected administrative department(s) as recorded on PAC.

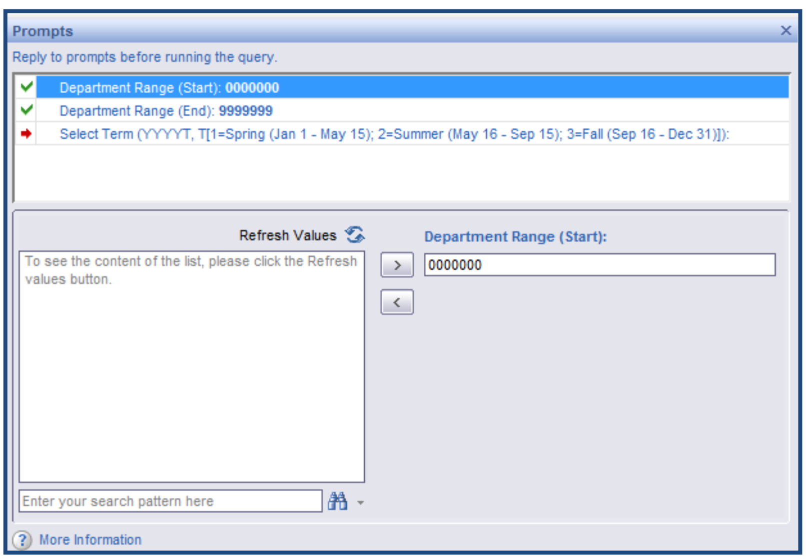
Report Use

This report is useful when checking overtime earnings against check actuals and also helps with budgeting.

Report Parameters

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires three prompts to be entered. Click on each value to select and then click on the "Run Query" button on the bottom of the screen.

- Department Range (Start)
- Department Range (End)
- Select Term



Department Range (Start & End):

Each user has a listing of his\her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

Click on the "Department Range" (Start) and "Department Range (End)" lines on the top of the screen. After clicking each line, enter the seven-digit department number in the text box in the middle of the screen.

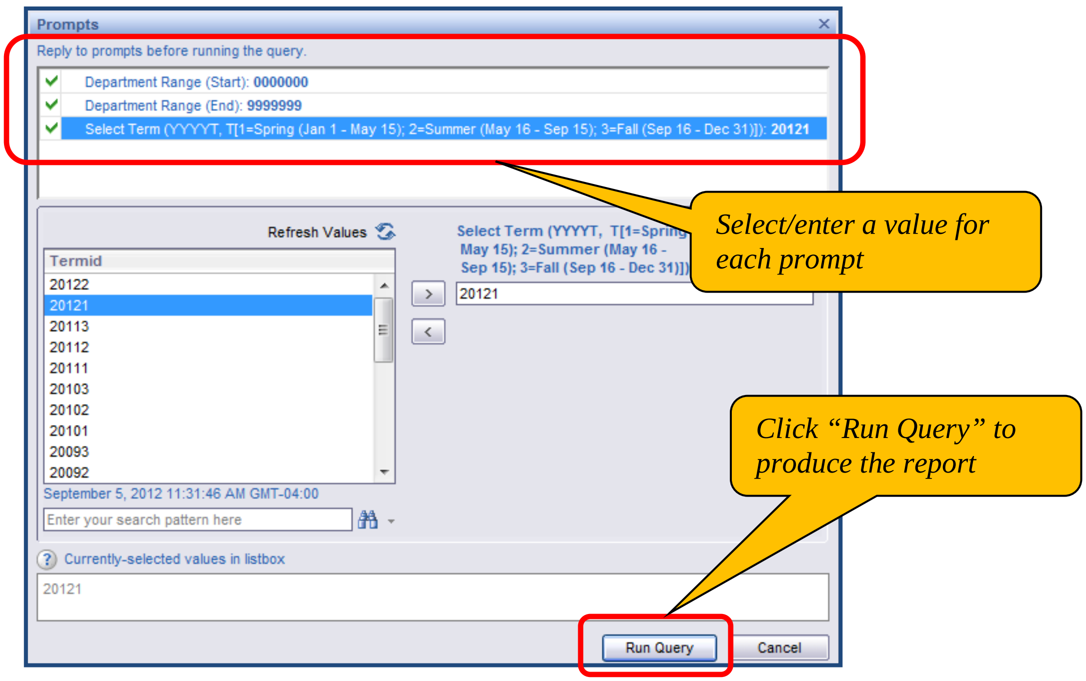
If you use the Default settings (0000000) and (9999999) you will get all your departments and associated information.

If you choose to limit the department list you can do so by clicking the **Refresh Values** options within the sub-window then double-clicking on the desired Department value.

Support Staff Overtime Earnings Report – Prior July 2012 Only, cont.

Select Term:

Click on the "Select Term" line on the top of the screen. After clicking this line, select the school term in the middle of the screen and then click the right facing arrow to make the selection. Or you can double-click on the desired value and it will be added.



Report Results

The report results show:

- Position Number, Title
- Bargaining Unit
- Term, Fiscal Year
- Admin Department, Position Department
- Name, Employee ID
- Fiscal YTD Earnings, Quarter, Month in Quarter
- Quarter Earnings, Month Earnings

Termination Report

Report Description

This report displays details of terminated employees (through e-Term or paper PAF) based upon the department range and position effective date or termination action date.

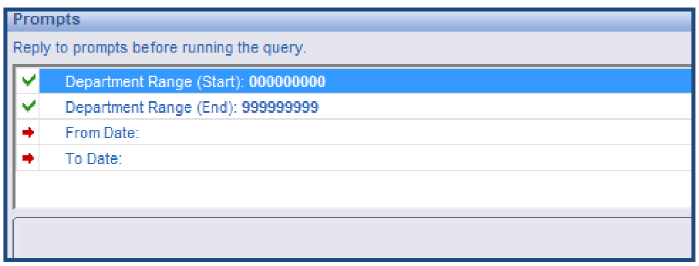
Report Use

This report is useful when confirming dates and information for terminated employees.

Report Parameters

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires four prompts to be entered. Click on each value to select and then click on the “Run Query” button on the bottom of the screen.

- Department Range (Start)
- Department Range (End)
- From Date
- To Date



Department Range (Start & End):

Each user has a listing of his\her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

Click on the “Department Range” (Start) and “Department Range (End)” lines on the top of the screen. After clicking each line, enter the seven-digit department number in the text box in the middle of the screen.

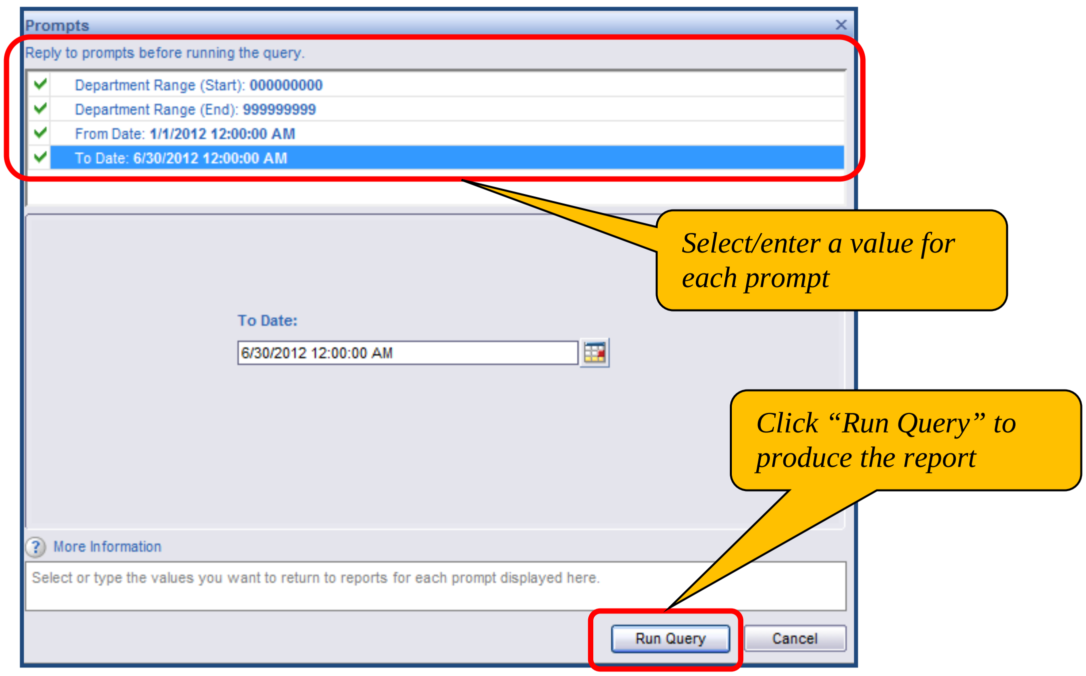
If you use the Default settings (0000000) and (9999999) you will get all your departments and associated information.

If you choose to limit the department list you can do so by clicking the **Refresh Values** options within the sub-window then double-clicking on the desired Department value.

Termination Report, cont.

From Date and To Date:

Click on the "From Date" and "To Date" lines on the top of the screen. After clicking each line, click the calendar icon to the right hand side of the text box in the middle of the screen to display the calendar. From there, click on the arrows in the calendar to navigate to the date. Click on the day in the month and year and the date will appear.



<u>Report Results</u>

The report results show:

- Employee ID, Employee Record Number
- Name
- Department ID (Number)
- Title
- Job Code
- Grade
- Action Reason
- Effective Termination Date

Upcoming/Past Appointment End Date Report

Report Description

This report displays summary data for all employees whose appointment end date occurs within three months from the date the report is run. This report also lists employees whose appointment end dates have passed.

Report Use

This report is useful for preparing and planning to re-appoint someone and during the annual re-appointment process.

Report Parameters

This report does not require entry of additional parameters.

Report Results

The report results show:

- Position Department (Number)
- Admin Department (Number)
- Employee ID
- Name
- Position Title
- Appointment End Date

Upcoming/Past Visa/Permit Expiration Date Report

Report Description

This report displays summary data for all employees who have a visa whose expiration date occurs within three months from the date the report is run. This report also lists any employee with an expired visa.

Report Use

This report is useful when determining if an employee's visa expiration data approached/is approaching.

Report Parameters

This report does not require entry of additional parameters.

Report Results

The report results show:

- Position Department (Number)
- Admin Department (Number)
- Employee ID
- Name
- Position Title
- Visa End Date
- Visa Type

Frequently Asked Questions

HR Manager Reports

<u>Reports</u>

What Reports are Available?

There are 14 Human Resources data reports available that provide information on employee personal, earnings and position data. See the training manual for a description on each of these reports.

How do I access the Reports?

Through myColumbia. myColumbia>HR Manager Resources>Reports>HR Manager Reports. They can also be accessed in the Enterprise Reporting section of myColumbia.

<u>Support</u>

Who do I contact if I have questions?

Submit an electronic inquiry via Service Now - https://columbia.service-now.com/navpage.do. You may also contact your HR Client Manager in Morningside or CUMC Central Human Resources and/or the PAC Service Center at 212-851-2888.

What training tools are available to me and how do I access them?

Training for HR Manager Reports is offered as part of the MSS Training classes held at Studebaker. To sign up for a session or to view training materials and information, visit the Human Resources website's Transaction Information Guide/PAC Resources webpage at http://managers.hr.columbia.edu/tig/PAC.

How do I correct information appearing in a report?

To correct personal or position data for an employee, please complete a PAF form and submit it through normal channels. For guidance or emergency action please contact your HR Client Manager in Morningside or CUMC Central Human Resources and/or the PAC Service Center at 212-851-2888.

Key Learning Points

- The University Data Store (UDS) is the data warehouse repository, where data from ARC, PAC, and Labor Accounting, Student, and Historical/Legacy system data is stored
- The HR Data Store is the location of the HR Manager Reports
- The data in the HR Data Store is “day old data”
- Multiple pages of data can be listed. Click the arrows on the top of the report to view additional pages of data
- Data can be saved in an Excel format for easy filtering and sorting
- Access to data is restricted to the approved department access in your security profile
- When selecting or entering department numbers for dates *prior to July 16, 2012*, use the department number structure in use at that time, e.g. 0120000. When selecting or entering department numbers for dates *post July 16, 2012*, use the department number structure currently in use, e.g. 160600X