Human Resources Reporting

This training guide provides you with the steps to generate reports on employee, job, payroll, and labor accounting data.

**Human Resources Reporting**

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Reporting at Columbia University - Overview
Columbia University has two reporting repositories: Accounting and Reporting at Columbia (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. Each component of the University Data Store (UDS) contains its own suite of reports.

UDS is the location of the HR Data Store for HR report data. The reports contain “day old data”, meaning that, running a report today displays information as of yesterday. Manager Self-Service Reports and Labor Accounting Reports also use HR data but are run directly within PAC.

Generating Human Resources reports is the focus of this training guide.

Types of Reports in each Location and Required Access

HR Data Store Reports
They are accessed through myColumbia and any of the below PAC roles are needed (requested via the PAC Security Application):

- Manager Self-Service
- Manager Reporter
- Central HR Administration (certain reports)

HR Manager Reports
HR Manager reports provide detail on employee and job data to help you in managing your day-to-day activities.

Recruitment Reports
Recruitment reports provide data on job postings, applicants and EOAA information.
PAC (People@Columbia) Reports – through the HR System
PAC is the Columbia University HR system and is the payroll system of record which reflects actual payroll data used for reporting and transaction activities. They are accessed through PAC and any of the below PAC roles are needed (requested via the PAC Security Application):

- Manager Self-Service
- Manager Reporter
- Accounting Approver

Note that payroll information is also found in other report suites, such as the Finance Data Store. However, it is presented differently specific to the intention of the report and thus may not provide you with accurate information needed to perform an HR Payroll transaction, such as the correct earnings code needed for a cost transfer.

Manager Self-Service (MSS) Reports
Manager Self-Service reports provide individual and department earnings and payroll information. The payroll reports available through MSS are extracted from HR data and differ from Finance Reports. Access to MSS Reports is provided to the following PAC roles:

- Manager Self-Service
- Manager Reporter

Performance Management Reports
Performance Management Reports provides a report for employees listing information related to the status, dates, acknowledgements, and ratings within a fiscal year period. Access to the report is provided to employees holding the ‘ePerformance Report’ PAC role.

Labor Accounting Reports
Labor Accounting reports provide detail on Fringe Rates, Funding Setup, Payroll Information, Cost Transfers 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
- Accounting Approver

Other Reports

Finance Reports
Finance reports are accessible through the Financial Data Store and provide various financial detail to assist in day-to-day activities. For information on financial reporting and access to financial reports, visit the Finance Training Website.
HR Manager Reports – from the HR Data Store

HR Manager reports reside in the HR Data Store and are accessed via the myColumbia portal.

Access the HR Data Store

1. Log in to myColumbia with your UNI and Password.
2. Click on the HR Manager tab.
3. Select the Reports tab.
4. Select HR Manager Reports.

The Home Tab (on the BI Launch Pad)

The landing page is the ‘Home’ tab on the BI Launch Pad. Below is a pictorial and description of the various tabs and tiles available. Selecting other tabs across the top such as Favorites or Recent Documents will scroll the page to that section.
HR Manager Reports Listing

1. Active Positions
2. Active Positions and Incumbents
3. Employee Personal and Job Data - by Bargaining Unit
4. Employee Personal and Job Data - by Job Function
5. Employee Personal and Job Data - by Job Function with Columbia University Business Title
6. Employee Personal and Job Data - by Position Department
7. Employee Personal Data - by Job Function
8. Employee Personal Data - by Bargaining Unit
9. Employee Vacation Accrual
10. Post-Docs Demographics
12. Student Officer Appointment Transactions
13. Terminations
14. Upcoming/ Past Appointment End Date
15. Upcoming/Past Visa/Permit Expiration Date

CU Recruitment Manager Reports – HR Manager Use

1. Applicant List for Job Posting
2. Equal Opportunity & Affirmative Action Report
3. Job Posting Dashboard
4. Job Posting Details

CU Recruitment Reports – Central Administration HR Only

In addition to the above Recruitment Reports, Central Administrators can run the below reports to check data.

2. Duplicate Row Checkup and Row Count Checkup
How to Generate an HR Manager Report

The following pages show you how to select prompts (filters) within reports. You run and view all the reports in the same way.

Open the HR Report Folder and Select a Report

Report suites that are available to you per your approved systems access are in the Folders tab. To get started, select the Folders tile to view available report suites.

1. Click the Folders tile.
2. Expand Public Folders, and then click the word HR.
3. Click (single click) the desired report under the Title section.

Reports and Prompts (Filters)

Some reports generate upon selection and others require additional filters, or prompts, to be selected before the output displays.

Reports that Do Not Require Additional Prompt Entry

Reports without required prompt entries – output generates upon selection. Select the report title from the list.

Active Positions
Active Positions and Incumbents
Employee Vacation Accrual
Upcoming/Past Appointment End Date
Upcoming/Past Visa/Permit Expiration Date Report

Example – Employee Vacation Accrual Report. If a report has multiple tabs, they will display along the top.
To generate another report, click the back arrow on the top left of the page and then select another report.

To navigate to all open documents, click the drop down arrow next to the report listed on the top of the page. A listing of current open documents appears. Select the desired document.

Reports that Require Additional Prompt Entry
Because the amount of data is so large, all other reports require filters be selected before the output generates. Filters differ depending upon the report.

How to select prompts (filters)
If a report requires filters be selected to generate the output, a pop up selection screen appears. Items with a check mark indicate that a choice was defaulted. Items without a check mark or displaying an “i” icon indicate that a selection must be made. Some reports also display the number of Mandatory items needed in the bottom left corner.

Check marks appear next to a prompt once selected and when all selections are made, the Run button becomes active, and the report can run.
**Filtering Defaulted Prompts**

Defaulted prompts can be further filtered if you are looking to limit the amount of data that generates by selecting the prompt on the left and then click the **Reload** load icon (refresh values) on the right. The values appear and you can select a specific one from the list (or you can enter the value in the text box). You can filter as many prompts as needed and when finished, click **Run** to generate.

![Filtering Defaulted Prompts](image)

**Date Prompts**

For reports that require dates, e.g., *Start and End, From and To, Appointment Start, Application Effective, Posting Effective,* or *After Title Effective* dates, enter the date manually, or select it from the calendar icon on the right side of the screen.

![Date Prompts](image)

When selecting a date from the calendar, navigate to the date, click on the day and then click **OK** on the bottom. Note that there is also a section to enter hours if you wanted to see results to that specificity.
**Department Number/Department Description Prompts**
The default settings, (department start = 0000000) and (department end = 9999999), returns data for all departments you have access to view. Depending on the report, this can be the an administrative or the position department.

**Bargaining Unit Prompt**
The default setting is “%” which includes all Bargaining Units.

**Employee Status Prompt**
Three employee statuses (A; L; P) are selected as the default. A = Active; P = Paid Leave; L = Leave of Absence.

**Select Term Prompt**
For reports with a very large amount of data, the information is provided by term. Select the school term and year using the format provided.

**Job Function Prompt**
The default setting is “%” which includes all job functions.

Job Function Codes and Descriptions:
- 01 = Officers of Instruction
- 11 = Officers of Research
- 21 = Officers of the Libraries
- 31 = Officers of Administration
- 41 = Student Officers
- 51 = Support Staff
- 61 = Others

**Recruitment System**
Settings include TL - TalentLink & R72 RAPS.

**Job Posting Number**
Select the Job Posting Number prompt and then click the **Reload Values** icon. Then, double-click the desired Posting Number or, enter the number in the “Type values here” box and then click the right facing arrow.
Saving Filters for Future Report Runs
To rerun reports using frequently used prompts, click the **Save** icon after selecting the filters. Then enter a name for the saved prompt selection, known as a variant, and click **Save**.

To use the created variant, select a report and on the prompt screen, click the **Prompts** drop-down arrow and select the variant you created to load the prompt screen. Then click **Run** and the already selected prompts that were saved will be used to generate the report.

Navigating Reports
Once a report is generated, menu sections appear on the top of the page that allow you to view, navigate, and export reports. Reference the below for a quick view on how to use these features.
Print a Report

Click on the ellipse icon in the File menu and select Print. Make any changes to the Range or the Layout and select Print. The report appears in .pdf format from which you can print.

The ‘All Reports’ option sends the entire document to a pdf which you can then print.

The ‘Current Report’ options allows you to select the number of pages that feeds to the pdf.

If you export the report into another format such as Excel, you may also print the report from that format. See next section.

Saving and Exporting Reports

The Save As Feature

Saving a report allows you to rename and place a generated report into your Documents folder on the BI Launchpad. It does not export it into a different format on another device. To save a document to your personal folder, follow these instructions.

1. Click the Save icon and select Save As.
2. Select My Folders and enter a report name in the File Name box and press Save.

To access the saved document, navigate back to the Launchpad, click the Home icon, select the Documents tile and then select the report from the list.
Export a Report
The export feature is used to save a report in another format on another device. Do not use the “save icon”.

1. Click the Export icon from the File menu.
2. Select the desired File Format from the left side and the exporting options on the right.
3. Select Export and Open the report.
4. Name the report and select the location on your computer to save it to using the File > Save command for software it was exported to (e.g., Excel or PDF).

Export Options
After selecting the file format from the left, select the options on the right.

Excel – Report Option
Within the Content Tab, select the Reports radio button and keep the “Name of the Report” box checked. The document is exported into a formatted Excel report. The Options tab does not require selection.

Export- Data Option
Within the Content Tab, select the Data radio button. Check box is greyed out and export creates the document in a .csv format. The report title and description do not appear on the top of the document. The Options tab does not require selection.

Export to PDF
Within the Reports Tab, keep the “Name of the Report” box checked. The document is exported into a .pdf format. The Options tab allows you to select the number of pages to include in the pdf. If no selection is made on this tab, the entire report is sent to pdf.

Export to CSV
This is similar in format to Excel Data exports. Selecting the Reports radio button creates the document in a .csv format and has a report title on the top. Selecting the Data radio button creates the document in a .csv format and does not have a report title on the top, similar to the Excel Data option. The Options tab does not require selection.
More on the Home Page
Additional navigations and features from the Home Page.

Categories
Categories is an organizational tool that allows you to tag reports into a category that is specific to you and not visible to anyone else. It is a way to see and categorize your reports.

1. From the Report Listing home page, click the ellipse icon at the end of a report to categories.
2. Select Categories.
3. Expand Personal Categories drop down and select the Personal Categories check box. Click OK.

Note the scroll bar to the right. Use this to view all category folders.

To view categorized reports, select the Categories tile from the Home Page and then select the report.
Schedule Reports
Certain users have the access to set a schedule to run reports automatically and have them delivered to your Inbox.

1. Right click on a report and select **Schedule** from the menu. Or click the ellipse menu at the end of the row.

2. Click **Add** in the Destinations section and select **BI Inbox** and click **Confirm**. **Note** - Emailing HR Reports is restricted to CU eMail domains only. Use caution when sending HR data.

3. Optional – Edit the report name. Select the radio button for **Use Specific Name** and then enter your preferred report name in the text box.

4. Use the **Run Report** dropdown menu to select the date(s) to schedule, e.g., Recurring, or Calendar, and enter the details for when you want the report to generate. Then click **Schedule** on the bottom of the page.
5. From the **Report Features** tab, select the format to deliver the report. E.g., *Excel – Reports* format

6. Select **Edit Prompt Values** to enter any prompts, if required, for the report.

7. Select **Schedule** on the bottom of the page. You will see the recurring report status on the **History** page, in the **Instances** section.

To view your scheduled reports and their statuses, click the **Instances** tile from the **Home** page. You can also run an instance, delete it, or reschedule as needed.
Task Bar
On the top right is a task bar where you can search (magnifying glass) and receive notifications (horn). Note that the help (?) does not provide results as it does not connect to the internet.

BI Inbox
This is your Inbox. Reports that you scheduled yourself or that someone else scheduled for you, are sent to My Inbox and appear on the left side when generated. Select a report and then click View to open.

Instances
Instances is where you access scheduled reports, not the actual report. You can run a report using an existing schedule or change the format, details, etc. See the Schedule Reports topic for information on how to schedule reports.

To see a history of your schedules, select a start and end date using the calendar in the Instance Time section, then click GO on the right.

Recycle Bin
This is where deleted items are sent. Click the ellipse at the end of a document row and you can restore or permanently delete the item.
Recent Documents
Displays recently generated reports in a tile format. Select a tile to open the report.

Favorites
This section is initially blank for HR users. To mark a favorite, select that option from the ellipse icon next to a report. The section will organize in alphabetical order.

Recently Run Documents
This displays recently run reports in a tile format. Select a tile to view the report.

Menu Bar
See below for information on other icons (not previously mentioned) within the menu bar once a report is generated.
HR Manager Reports – Description and Output
Following are the reports contained within the HR Folder and their outputs.

Active Positions Report

Report Description/Use
This report displays all active University positions that are vacant or filled in administrative departments whose data you have access to view. It does not display names of employees who occupy (or occupied) the positions. It is helpful to see the positions available in your department or when you need to reclassify a position. Note: work with your HR Business Partner when discussing position changes.

Report Filters
This report does not require data selection to generate.

Report Results
The report results show:

- Position Number
- Position Description
- Position Status
- Position Effective Date
- Job Code
- Position Department Number
- Position Department Name
- Grade
- Max Head Count
- Head Count
- Full/Part Time
- Standard Hours
- Work Location
Active Positions and Incumbents Report

Report Description/Use

This report displays all active University positions (vacant or filled) and the names of staff filling any of those positions in administrative departments whose data you have access to view. This report is useful to also obtain position numbers and it also helps if you need to reclassify a position. Note: work with your HR Business Partner when discussing position changes.

Report Filters

This report does not require data selection to generate.

Report Results

The report results show:

- Position Number
- Position Description
- Salary Admin Plan Code
- Job Code
- Position Department Number
- Position Department Name
- Grade
- Max Head Count
- Head Count – if 0 then New or EMP is termed.
- Full/Part Time
- Standard Hours
- Work Location
- Incumbent Employee ID
- Incumbent Name
- Manager Position Number
- Manager Position Description
- Manager Name

<table>
<thead>
<tr>
<th>Position Number</th>
<th>Position Description</th>
<th>Salary Admin Plan Code</th>
<th>Job Code</th>
<th>Position Department Number</th>
<th>Position Department Name</th>
<th>Grade</th>
<th>Max Head Count</th>
<th>Head Count (if 0, position is new or employee has been terminated)</th>
<th>Full/Part Time</th>
<th>Standard Hours</th>
<th>Work Location</th>
<th>Incumbent Employee ID</th>
<th>Incumbent Name</th>
<th>Manager Position Number</th>
<th>Manager Position</th>
<th>Manager Name</th>
<th>Multiple Incumbent Positions</th>
</tr>
</thead>
</table>
Employee Personal and Job Data Reports

Report Description/Use

There are four versions of this report that displays comprehensive personal and position related data for University employees in the selected administrative department(s) and bargaining unit(s) as recorded in PAC and is useful when additional personal or job data not available in Manager Self-Service is needed.

Report Versions

- Employee Personal and Job Data – by Bargaining Unit
- Employee Personal and Job Data – by Job Function
- Employee Personal and Job Data – by Job Function with CU Business Title
- Employee Personal and Job Data – by Position Department

Employee Personal and Job Data – by Bargaining Unit - Report Filters

- Admin Department Number (Start)
- Admin Department Number (End)
- Value(s) for Bargaining Unit Name (use % for ALL)
- Employee Status (A; P; L is defaulted)
- Select Term

Report Results

- 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 Code, Ethnic Group
- Highest Degree Code, Highest Degree Name, Degree Year, Degree Institution Code
- 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 Code, Position Status Code, Position Status
- Work Location Code, Work Location, US Citizen, Visa Type Code, Visa Expire Date
- Tenure Status Code, Tenure Status, Tenure Date
- Active Positions, Position Entry Date, Appointment End Date
- Job Code, Job Description, Job Effective Date, Job Function Code, Job Family Code, Job Family
- ACAD Rank, ACAD Rank 1, ACAD Rank 2, Grade
- Compensation Rate, Comp Rate End Date, Compensation Frequency Code, Compensation Frequency
- Weekly Hours, Bargaining Unit Code, Bargaining Unit, Sabbat End Date
- FT/PT Status, Multiple Positions?
- Action Type, Action Reason Code, Action Reason, Action Effective Date
- Position Extract Date
- Term ID, Position Title, Contract Period Salary, Leave through Date
Employee Personal and Job Data – by Job Function - Report Filters

- Admin Department Number (Start)
- Admin Department Number (End)
- Job Function (use % for ALL)
- Employee Status (A; L; P is defaulted)
- Select Term

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 Code, Ethnic Group
- Highest Degree Code, Highest 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 Code, Position Status
- Work Location Code, Work Location, US Citizen? Visa Type Code, Visa Expire Date
- Tenure Status Code, Tenure Status, Tenure Date
- Active Positions, Position Entry Date, Appointment End Date
- Job Code, Job Description, Job Effective Date, Job Function Code, Job Family Code, Job Family
- ACAD Rank, ACAD Rank 1, ACAD Rank 2, Grade
- Compensation Rate, Comp Rate End Date, Compensation Frequency Code, Compensation Frequency
- Weekly Hours, Bargaining Unit Code, Bargaining Unit, Sabbat End Date
- FT/PT Status, Multiple Positions?
- Action Type, Action Reason Code, Action Reason, Action Effective Date
- Position Extract Date, Term ID, Position Title
- Contract Period Salary
- Leave through Date

Employee Personal and Job Data Report – by Job Function with Columbia University Title

This report is similar to the Employee Personal and Job Data Report – by Job Function described above except that it provides the Columbia University Title for the employee. See above for the prompts and output.
Employee Personal and Job Data Report – by Position Department

This report provides employee data to departments who have faculty appointed in other departments. It allows you to see data for those who have positions in your departments but an admin department that you do not have access to.

Report Filters

- Position Department Number (Start)
- Position Department Number (End)
- Job Function (% for ALL is defaulted)
- Employee Status (A; P; L is defaulted)
- Select Term

Report Results

- 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 Employment Status
- Gender, DOB, Ethnic Group Code, Ethnic Group,
- Highest Degree Code, Highest Degree Name, Degree Year, Degree Institution Code
- 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 Code, Position Status
- Work Location Code, Work Location
- US Citizen? Visa Type, Visa Expire Date
- Tenure Status Code, Tenure Status, Tenure Date
- Active Positions, Position Entry Date, Appointment End Date
- Job Code, Job Description, Job Effective Date, Job Function Code, Job Family Code, Job Family
- ACAD Rank, ACAD Rank 1, ACAD Rank 2,
- Grade
- Compensation Rate, Comp Rate End Date, Compensation Frequency Code, Compensation Frequency
- Weekly Hours, Bargaining Unit Code, Bargaining Unit
- Sabbat End Date, Full/Part, Multi Pos? Action Type, Action Reason Code, Action Reason, Action Effective Date
- Position Extract Date, Term ID
- Position Title, Contract Period Salary
- Leave through Date
Employee Personal Data Reports

Report Description/Use

There are two versions of this report, one by Job Function, and one by Bargaining Unit, that displays comprehensive personal data for University employees in the selected administrative department(s) and job function(s) as recorded in PAC and is useful when additional personal data not available in Manager Self-Service is needed.

Employee Personal Data – by Job Function - Report Filters

- Admin Department Number (Start)
- Admin Department Number (End)
- Job Function (use % for ALL)
- Employee Status (A; P; L is defaulted)
- Select Term

Employee Personal Data – by Bargaining Unit - Report Filters

- Admin Department Number (Start)
- Admin Department Number (End)
- Employee Status (A; P; L is defaulted)
- Bargaining Unit Name (or use % for ALL)
- Select Term

Report Results

- Employee ID, Employee Record
- Admin Department Number, Admin Department Name
- Employee Name, Position Department Number,
- Position Department Name, Position Title (in the Job Function report version only),
- Bargaining Unit, UNI
- Original Hire Date, Seniority Date, First Tenure Position Date, CU Employment Status
- Gender, DOB, Age, Ethnic Group Code, Ethnic Group
- Highest Degree Code, Highest Degree Name, Degree Year, Degree Institution Code
- Home ZIP, Extract Date, Email, Office Address Line 1, Line 2, Line 3, Office City, State and ZIP Code
- Office Phone Number
- Tenure Status, Tenure Date (Job Function report version only)
Employee Vacation Accrual Report

Report Description/Use
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. It is useful to gather employee information in preparation for the Year End Vacation Accrual Report exercise. This data is refreshed every June in preparation for this exercise.

Report Filters
This report does not require data selection to generate.

Report Results
The report results show:
- Admin Department Number
- Admin Department Name
- Job Function Code
- Last Name
- First Name
- Ps Employee ID

Post-Docs Demographic Report

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

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

Report Results
The report results show:
- Name, UNI,
- Administrative Department Name,
- Title, Title Effective Date, Year, Month
Salary Planning Report - available May - July to users with e-Comp Report Access

Report Description/Use
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. It is useful when preparing for and administering e-Comp for the annual merit increases.

Report Filters
• 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 side. Scroll through the listings on the left side and click to select the department/job function code(s). Then click the right facing arrow to make the selection. You can also select *ALL* or you can select one or multiple groups. To select multiple groups, press down the Ctrl key while selecting groups using the left click of the mouse.

Report Results
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
Student Officer Appointment Transactions Report

Report Description/Use

This report displays comprehensive personal and position related data for active student officer new hire and reappointment transactions in the selected administrative department(s) and is useful when reviewing the details of student officer appointments.

Report Filters

- Admin Department Number (Start)
- Admin Department Number (End)
- Appointment Start Date

Report Results

The report results show:

- Employee ID, Employee Record, Admin Department Number, Admin Department Name,
- Employee Name, Position Department Number, Position Department Name, UNI,
- Original Hire Date, Service Date, CU Employment Status,
- Gender, DOB, Age, Ethnic Group,
- Highest Degree Code, Highest Degree Name, Degree Year, Degree Institution Code,
- Home ZIP, Extract Date, Email
- Office Addr Line 1, Office Addr Line 2, Office Addr Line 3,
- Office City, Office State, Office ZIP, Office Phone Number,
- Work Location Code, Work Location
- US Citizen, Visa Type Code, Visa Expire Date,
- Position Entry Date, Appointment Start Date, Appointment End Date,
- Job Code, Job Description, Job Function Code, Job Family Code, Job Family,
- ACAD Rank, ACAD Rank 1, ACAD Rank 2, Grade
- Compensation Rate, Comp-Rate End Date, Compensation Frequency Code, Compensation Frequency
- Hourly Rate, Weekly Hours, Bargaining Unit Code, Bargaining Unit,
- Full/Part, Action Effective Date
- Position Title, Contract Period Salary, CU Business Title
Termination Report

Report Description/Use
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. It is useful when confirming dates and information for terminated employees.

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

Report Results
The report results show:
- Employee ID, Employee Record
- Employee Name
- Department ID (Number), Department (Name)
- Title, Job Code, Grade
- Action Reason, Effective Termination Date

Upcoming/Past Appointment End Date Report

Report Description/Use
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. It is useful when preparing and planning to re-appoint someone and during the annual re-appointment process.

This report does not require data selection to generate.

Report Results
The report results show:
- Position Department (Number), Admin Dept (Number), Admin Dept Name
- Employee ID, Employee Name, Position Title
- Appointment End Date

<table>
<thead>
<tr>
<th>Position Department</th>
<th>Admin Department</th>
<th>Admin Department Name</th>
<th>EmpID</th>
<th>Employee Name</th>
<th>Position Title</th>
<th>Appt End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Report is looking 3 Months ahead and 3 Months prior 10/21/22</td>
<td>Upcoming/Past Appointment End Date Report</td>
<td>NOTE: BY ACCESSING THIS DATA YOU AGREE TO ADHERE TO UNIVERSITY POLICY ON CONFIDENTIALITY OF SENSITIVE DATA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Upcoming/Past Visa/Permit Expiration Date Report

Report Description/Use

This report displays summary data for all employees who have a visa whose expiration date that occurs within three months from the date the report is run. This report also lists any employee with an expired visa. It is useful when determining if an employee’s visa expiration date approached/is approaching.

This report does not require data selection to generate.

Report Results

The report results show:

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

<table>
<thead>
<tr>
<th>Report Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Report is looking 3 months ahead</td>
</tr>
<tr>
<td>Upcoming/Past Visa/Permit Expiration Date Report</td>
</tr>
<tr>
<td>NOTE: BY ACCESSING THIS DATA YOU ARE AGREE TO ABIDE BY UNIVERSITY POLICY ON CONFIDENTIALITY OF SENSITIVE DATA</td>
</tr>
</tbody>
</table>
Recruitment Reports for Human Resources Managers/Central HR Administrators

Recruitment reports that contain data regarding applicants and positions are accessible from the **CU Recruitment Folder** and are available to HR Managers and Central HR Administrators. All reports are available to Central HR within the **HRIS** folder and those highlighted are available to all HR Managers within the **Manager** folder.

---

**Duplicate Row Checkup – in the Watchdog Reports Folder – HRIS Only**

**Report Description**

This report displays any duplicate row data in RAPS and TalentLink for Central Admin to make corrections.

**Report Filters**

This report does not require data selection to generate.

**Report Results**

- System CD
- Application ID
- Count

---

**Row Count Checkup – in the Watchdog Reports Folder – HRIS Only**

**Report Description**

This report displays the number of postings, applicants, and other specific count data.

**Report Filters**

This report does not require data selection to generate.

**Report Results**

- System CD
- Table Name
- Distinct Count
- Distinct Count Column
- Total Count
Applicant List for Job Posting

Report Description

This report provides you with the list of applicants for a specific job posting and is useful for obtaining Columbia work history for an applicant and if they have family members working at Columbia or Columbia Affiliates.

Report Filters

- Job Posting Number
- Recruitment System (RAPS or TalentLink)

Report Results

Posting Information:

- Recruitment System, Post Number, Position Title, Department (Number), Date Posted, Date Closed

Application Information:

- Record Number, Application ID, Application Date
- Posting Hire Position, Posting Hire Position Title
- Last Name, First Name, Application Status
- Not Hired Reason, Status Effective Date,
- Education: HS Diploma, Highest Degree
- Columbia Work History: Columbia Employee, Laid Off, Laid Off Date
- Family Members Currently Employed by Columbia University: Family Member 1, Family Member Relationship 1, Family Member Dept 1, Family Member 2, Family Member Relationship 2, Family Member Dept 2
- Family Members Currently Employed by Columbia University Affiliates: Family Member 1, Family Member 2
Equal Opportunity & Affirmative Action Report

Report Description

This report displays details of candidate data related to a position posting, if they were hired, and if not, the reason not hired. It is useful for Equal Opportunity and Affirmative Action compliance and reporting.

Report Filters

- Application Effective Start Date
- Application Effective End Date
- Posting Number
- Department
- Recruitment System (RAPS or TalentLink)

Report Results

The report results show:

- Record Number, Recruitment System
- Posting Number, Open Date, Position Number, Position Title
- Job Type, Job Family
- Department (Number), Department Name
- Location
- Last Name, First Name
- Gender, Gender Not Disclosed, Hispanic/Latino, Hispanic Not Disclosed
- Am Ind/AK Native, Asian, Black/African American
- Pacific Islander, White, Race Not Disclosed
- Application Status, Effective Date, Reason Not Hired
Equal Opportunity & Affirmative Action Report (PAC) – HRIS Only

**Report Description**

This report displays details for hired employees and is useful for obtaining position, incumbent, and department data.

**Report Filters**

- Transaction Effective Start Date
- Transaction Effective End Date
- Action
- Action Reason
- Position Number

**Report Results**

The report results show:

- Record Number, Position Number
- Job Code, Annual Rt, Job Indicator, Location
- Union Cd, Library Rank, Job Title, Job Type
- Dept ID, Dept Name
- Level 3, Level 3 Name, Level 4, Level 4 Name, Level 6, Level 6 Name (Department Numbers and Names)
- Empl ID, Last Name, First Name, Gender
- Am Ind/AK Native, Asian, Black/African American, Hispanic/Latino, Pacific Islander, White,
- Not Specified, Race Not Provided
- Hire Date, Grade, FLSA Status, Academic Rank
- Tenure Status, Current Empl Status, Full/Part Time

---

**Equal Opportunity & Affirmative Action Report (PaC)**

<table>
<thead>
<tr>
<th>Transaction Effective Start Date</th>
<th>Transaction Effective End Date</th>
<th>Action</th>
<th>Action Reason</th>
<th>Position Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2020</td>
<td>2/10/2021</td>
<td>HIR</td>
<td>NEW</td>
<td>All</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Position Number</th>
<th>Job Code</th>
<th>Annual Rt</th>
<th>Job Indicator</th>
<th>Location</th>
<th>Union Cd</th>
<th>Library Rank</th>
</tr>
</thead>
</table>
Job Posting Dashboard

Report Description

This report displays a dashboard of postings with links to the job posting details and applicant list for the posting and is useful for obtaining those details.

Report Filters

- Posting Effective Start Date
- Posting Effective End Date
- Posting Status
- Grade
- Position Number
- Position Title
- Department
- System Source (RAPS or TalentLink)

Report Results

The report results show:

- Record Number, Recruitment System
- Posting Number (a URL to the Job Posting Details)
- Applicant List (a URL to the applicant list for the Job Posting)
- Posting Status, Posting Status Effective Date, Position Title, Department (Number), Post Type
- Location, Job Type, Bargaining Unit, Incumbent, Hrs Per Wk, Job Family, Grade

Job Posting Details

Report Description

This report provides you with the details for a specific job posting.

Report Filters

- Job Posting Number
- Recruitment System (RAPS or TalentLink)

Report Results

The report result displays the details for the job posting.
Legacy – Distinct Parameter Values Sheet – HRIS Only

This is an Excel report that displays the values used within the reports. Reference this sheet for a list of available parameter values to enter into the Legacy JAC 58, RAPS58 Report. Categories are Job Type, Position Title, Department, Posting Number, Posting Source, and System Source.

Legacy – JAC58, RAPS58 – Job Posting Details – HRIS Only

This report displays position data from the 5.8 versions of JAC and RAPS during the following timeframes. Faculty postings – RAPS 5.8: 2008 – 2019 and Admin, Support Staff, and Casuals postings - JAC 5.8: 2008 – 2019.

Report Filters

Required data prompts are below. All other prompts are optional to narrow down the results. Click OK on the bottom of the screen.

- Post Status From Date
- Post Status To Date
- For System Source – the field is not required, and you can leave it blank to see all system data. Or enter “J%” to get positions in JAC or “R%” to get positions in RAPS.

To filter the generated report, export it selecting Microsoft Excel – Data Only (XLSX) by changing the file format. This option must be selected.
PAC Reports – from Manager Self-Service in PAC
Performance Management, Labor Accounting and MSS reports are run from PAC.

1. Log in to myColumbia with your UNI and Password.
2. Click on the **HR Manager** tab.
3. Select the **PAC** Icon.
4. Click the **Manager Self Service** tile then the **Manager Reports** tile.
5. Expand the menu to select a report.

When in PAC, you can also navigate to these report suites using the menu: **Main Menu > Manager Self Service > Manager Reports**. Expand the menu to select a report.
Manager Self-Service Reports and Queries

Manager Self-Service Reports and Queries are in the Manager Reports folder within Manager Self Service.

Manager Self Service Earnings Queries
Manager Self Service Payroll Queries retrieve earnings and payroll information in a department or employee view. These queries return real time data from the Production environment.

- **Department Earnings Register** - This report lists regular, overtime, and other earnings for employees in your department for ONE designated pay period.
- **Employee Earnings History and Employee Earnings FY History** - This report lists regular, overtime and other earnings for ONE employee in your department over SEVERAL pay periods (in multiple year view or FY view).

Report Use
These Earnings Reports provide detail on the employee’s earnings as well as the earnings code that indicates the type of pay and can be viewed by department or by employee (in history or FY history view). They are helpful when processing cost transfers (Labor Accounting users) and you need to determine the exact earn code for the payment. The "- - -" earn code is the same as the REG earn code and indicates the earnings were the employee’s regular earnings.
Report Filters
These reports require entry of additional filters. A message displays instructing you NOT to leave any fields blank on the following screen. Click “OK”. You can enter a wildcard or "%" sign to search all items in that field.

Step 1 – Select either the Department Earnings Register or Employee Earning History or Employee Earnings FY History link.

Step 2 – Enter data into the fields. When running the report by department, a Pay Period End date is required and when running the report by employee, the Employee ID is required. You can further detail the output or to view all available data, enter a “%” which is a ‘wildcard’ in PAC and will return all data.

By Department

- Pay Period End: Enter or click the magnifying glass to select the pay period date of earnings to view.
- Pay Frequency: Select the pay period frequency to view. Options are: % = all paychecks, B = bi-weekly; M = monthly; S = semi-monthly or W = weekly.
- DeptID: Enter the specific department ID or "%" for all departments.
- Empl ID: Enter the specific employee ID or type "%" to search for all employees.
- Name: Enter the specific employee's name or type "%" to search for all employees.

Step 3 – Click ‘View Results’

By Employee (History or FY History)

- Empl ID: Enter the Employee’s ID number (if unknown, can be found on the View Employee Personal Information page)
- Year:
  - Enter the year of earnings to view or % to view all available years in the PAC database – History report
  - Enter the Fiscal Year of earnings to view (% option not applicable) – FY History report
Manager Self Service Earnings Queries - Report Results

The results can be exported into an Excel spreadsheet for additional formatting by clicking the link on the top of the page.

By Department

By Employee

- Dept ID: The employee's admin department
- UNI: The employee's UNI
- Name: The employee's name
- ID (Employee ID): The unique PAC ID for the employee
- Co (Company): The employee will be in CU1 unless s/he is a retiree then s/he will be in REIT
- Pay Group: Grouping of employee populations for payroll purposes
- Frequency: The compensation frequency for the employee
- Pay Period End: The end of the earnings period
- Check Dt: The check date for the designated pay period
- Year: The earning's year (calendar) – Employee Report Only
- Off cycle: Y = Yes; N = No
- Earn Code: Earnings Code. The "--.--" earnings code is the same as the REG earnings code and indicates the earnings were the employee's regular earnings
- Description: Description of the Earnings Code
- Reg Hours: Regular Hours for the designated pay period
- Reg Earns: Regular Earnings for the designated pay period
- OT Hours: Overtime Hours for the designated pay period
- OT Earns: Overtime Earnings for the designated pay period
- Oth Hours: Other Hours for the designated pay period
- Oth Earns: Other Earnings for the designated pay period
- Addl #: Indicates the number of additional position numbers an employee has = Department Report only
Manager Self Service Payroll Queries

a. *Department Payroll Register* - This report lists the total gross, total taxes, total deductions, and net pay for employees in your department, for ONE designated pay period.

b. *Employee Payroll History and Employee Payroll FY History* - This report lists the total gross, total taxes, total deductions, and net pay for ONE employee in your department, over SEVERAL pay periods (in multiple year view or FY view).

**Report Use**

These Payroll Reports provide payroll detail on the employee's earnings and can be viewed by department or by employee (in history or FY history view).

**Report Filters**

These reports require entry of additional filters. A message displays instructing you NOT to leave any fields blank on the following screen. Click “OK”. You can enter a wildcard or "%" sign to search all items in that field.

**Step 1** - Click either the *Department Payroll Register* or *Employee Payroll History* or *Employee Payroll FY History* link.

**Step 2** – Enter data into the fields. When running the report by department, a Pay Period End date is required and when running the report by employee, the Employee ID is required. You can further detail the output or to view all available data, enter a “%” which is a ‘wildcard’ in PAC.

<table>
<thead>
<tr>
<th>By Department</th>
<th>By Employee (History or FY History)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period End: Enter or click the magnifying glass to select the pay period date of earnings to view.</td>
<td>Empl ID: Enter the Employee’s ID number (if unknown, can be found on the View Employee Personal Information page)</td>
</tr>
<tr>
<td>Pay Frequency: Select the pay period frequency to view. Options are: % = all paychecks, B = bi-weekly; M = monthly; S = semi-monthly or W = weekly</td>
<td>Year:</td>
</tr>
<tr>
<td>DeptID: Enter the specific department ID or &quot;%&quot; for all departments.</td>
<td>o Enter the year of earnings to view or % to view all available years in the PAC database – History report</td>
</tr>
<tr>
<td>Empl ID: Enter the specific employee ID or type &quot;%&quot; to search for all employees.</td>
<td>o Enter the Fiscal Year of earnings to view (% option not applicable) – FY History report</td>
</tr>
<tr>
<td>Name: Enter the specific employee's name or type &quot;%&quot; to search for all employees.</td>
<td></td>
</tr>
</tbody>
</table>

**Step 3** – Click ‘View Results’
Manager Self Service Payroll Queries Report Results

The results can be exported into an Excel spreadsheet for additional formatting by clicking the link on the top of the page.

By Department

By Employee

- **Dept ID**: The employee's admin department
- **UNI**: The employee's UNI
- **Name**: The employee's name
- **ID (Employee ID)**: The unique PAC ID for the employee
- **Co (Company)**: The employee will be in CU1 unless s/he is a retiree then s/he will be in REIT
- **Group**: Grouping of employee populations for payroll purposes – the Pay Group
- **Pay Period End**: The end of the earnings period
- **Check Dt**: The check date for the designated pay period
- **Year**: The earning's year (calendar) – Employee Report Only
- **Off cycle**: Y = Yes; N = No
- **Form ID**: Identifies that the employee will receive their pay by printed check (CUCHK) or by direct deposit (CUDDA)
- **Total Gross**: Total gross pay for the designated pay period
- **Total Taxes**: Total taxes taken out for the designated pay period
- **Total Deductions**: Total deduction taken out for the designated pay period
- **Net Pay**: Net pay for the designated pay period
- **DDA Suppressed**:
  - Y = Yes - employee does NOT receive a Direct Deposit Advice
  - N = No - employee receives a Direct Deposit Advice
  - BLANK - employee receives a paper check
Personnel Action Report

A Personnel Action Report lists every employee in your department that has had a transaction action date in the current month. If the report is run during the first week of a month, only the preceding month's data is available.

Interpreting the Report

- Certain transactions, such as TBH, eTerminations or PAF submittals, require the HRPC to run processes to complete the transactions. This is the action date for the transaction.
- In addition to the action date for the transaction, the effective date for that transaction is also displayed.
- The descriptions of the transactions are displayed using Action and Reason Codes. Action and Reason Codes are used in PAC to categorize job and position actions. They indicate the types of changes made to an individual’s record. Access the Action and Reason code job aid on the HR Website for more information and code definitions.

Note: Address changes will not appear on this report. Access the View Employee Personal Information page in MSS to view an employee’s addresses or the HR Manager Reports on the HR Data Store to retrieve the home zip code and office address information for employees in your department(s). See the HR Manager Reports lesson for more information.

Generate the Report

Step 1 - Click the Generate a Personnel Action Report link to view the report. No additional data entry is required. The report will be created displaying data for departments that you are able to view as per your approved security profile.

See below for a report example. The results can be exported into Excel by clicking the “Excel Spreadsheet” link at the top of the page.
Performance Management Reports

Performance Management Reports provides a report for employees listing information related to the status, dates, acknowledgements, and ratings within a fiscal year period. Access to the report is provided to employees holding the ‘ePerformance Report’ PAC role.

Performance Management Reports are in the Performance Management Reports folder within Manager Self Service.

Status Report for Managers

a. Managers who hold the “CU eManager” role can access the report. The landing page displays.
b. Select the Fiscal Year from the Fiscal Year lookup field.

c. Select the Document Status from the drop-down menu.
d. Select “Include Indirect Reports” if those results are needed.

![Image of the Status Report for Managers screen]

- Select Fiscal Year.
- Select Document Status from the drop-down list. If blank, all types of Document Status will be included in the report.
- Check/Uncheck “Include Indirect Reports”.
- Ensure that all the parameters are correct, then click on Run Status Report button.
- A new tab will be populated to display the results.

Fiscal Year: 2020, 07/01/2019 - 06/30/2020

Include Indirect Reports

Run Status Report

---

e. Select Run Status Report. The report displays the Manager’s direct reports and all indirect reports.

![Image of the CU_PP_STATUS_REPORT screen]

- Download results in: Excel Spreadsheet, CSV, PDF, XLSX, XLS.

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f. Uncheck “Include Indirect Reports” if you do not want to include those results in the report.

g. Click on “Run Status Report”. The report only displays the Manager’s direct reports.

![Image of the CU_PP_STATUS_REPORT screen with the Include Indirect Reports option unchecked]

Status Report for Department Administrators

a. Department Administrators who hold the “CU ePerformance DA” role can access the Status Report for DAs. The report results display information for the departments you have access to view.

   The landing page displays.

b. Create a new Run Control ID.
   i. Click on Add new Value tab.
   ii. Enter a Run Control ID. A new Run Control can be created and retained for different sets of Department IDs needed for the report. Once a Run Control has been created, it should always be available.
   iii. Follow the steps in the Labor Accounting Reports section on how to run a report using a Run Control ID.
Labor Accounting Reports and Queries
Labor Accounting Reports are in the Manager Reports folder within Manager Self Service.

Labor Accounting Reports
Labor Accounting Reports provide details on labor accounting data in PAC and are in the Manager Reports folder within Manager Self Service.

Each report has slightly different filters, but all will require certain criteria on which to base the report, including department number(s) and dates. Each report will be described later in this document. Following are the basic steps that apply to generating all reports.

**Step 1** - Click on the link for the report you would like to run.

**Step 2** – Create or Reuse a Run Control ID. A Run Control ID is the name you are giving your report.

1. If you are **reusing an existing Run Control ID**, select the “Find and Existing Value” and then click “Search”. Select the Run Control ID from the list results.
2. If you are **creating a new ID**, select the “Add New Value” tab and then type in the name you want to use and click “Add”.

**Notes:**

- A Run Control ID cannot contain spaces or special characters.
- Select a name that will be meaningful to you, so that you can easily find it when you want to reuse it.
- You can reuse the same run control after you set up a report, and just change the filters, for example the date(s) for which you want to run the report.

**Important!** If you are re-using a Run Control ID to generate another report, wait until the first one completes before running the next one.

- For reports that you are going to run frequently, you may want to set up all the filters once, and then just change the date range as required.
Step 3 – Enter, or select using the magnifying glass, the dates and department number(s).

Department View – individual or multiple department(s) selection

To enter more departments, click the “+” sign to add additional rows.

Department View – department level grouping selection

You may want to run a Labor Accounting report for group of similar departments rather than for specific level 8 department. To do this:

a. Enter the first few digits of the department and then a “%” sign (e.g., 0703%).

b. Click “save”.

c. This will expand your selection and return all departments that begin with 0703.
Department View – department node selection – available in certain reports

You may want to run a Labor Accounting report by node, where available rather than for specific departments. To do this:

a. Select the “Department Tree Node” radio button.

b. Key in or use the search feature to enter the department node.

c. This will expand your selection and return all node and department values underneath the node you entered.

Step 4 – Run the report. Click ‘Run’ in the upper-right corner of the screen. After you click ‘Run’, the system will take you to the Process Scheduler Request Screen. This serves as the confirmation page. If you want to request the report, click ‘OK’. If you do not want to run the report, click ‘Cancel’.
Step 5 – Once you click ‘OK’ you will be brought back to the report set-up page. Note that the request was given an identifying number, the Process Instance. Click on ‘Process Monitor’ to view the status of your report request.

Step 6 – Once the Run Status = Success and the Distribution Status = Posted you can view your report. If the status is anything else (e.g., queued, pending) you can click “Refresh” to update the page.

Step 7 – View the Report. Once the report has run successfully, it can be exported into Excel from the .csv file.

a. Click the ‘Details’ link on the process monitor page (see above print, next to the Distribution Status). This will bring you to the Process Detail page for your report.
b. Click on ‘View Log/Trace’.
c. Click on .CSV file.

The following pages will show you the set-up filters for each of the reports.

You run and view all of the reports in the same way (as illustrated above).
Fringe Rate Report
The Fringe Rate Report allows you to view the fringe rate(s) charged, by employee, as of a specific date.

Report Use
Departments can use the report to determine what fringe rate(s) were used for an employee. Once a report has been set up, you can reuse the run-control and just change the date. For example, you may want to run the Fringe Rate Report monthly for a group of departments. You can set up the report filters once, and every month select the run control and only change the “as of date”.

Report Filters
1. The ‘As Of’ date
2. Report View. Select either Department or Employee:
   a. Department – the fringe rate(s) for each employee in the specified department(s) as of the date entered.
   b. Employee – the fringe rate(s) charged for a specific employee as of the date entered.
3. Enter the department(s) or employee(s) for which you want to run the report. You can search for departments/employees using the magnifying glass or you can key in the IDs. You can enter as many departments or employees as you want to have on the report. To add extra rows, click on the plus sign.
4. Follow the steps outlined on pages 62-65 to run and view the report.

Fringe Rate Report - Report Output
The report displays the following information.
- **Empl Rcd**: The record number that is associated with a position/job, e.g., ‘0’ or ‘1’. Employees can have multiple jobs and will thus have multiple Empl Rcd numbers.
- **Last Name**: For the employee.
- **First Name**: For the employee.
- **Department ID**: The employee’s admin department.
- **Earn Code**: Earnings Code. The "- - -" earnings code is the same as the REG earnings code and indicates the earnings were the employee’s regular earnings
- **Description**: The description of the Earn Code.
- **Combo Code**: The 10-digit system-generated number representing a unique ChartString to where the earnings are allocated.
- **Overtime Hours**: Overtime Hours for the designated pay period.
Funding Setup Report

The Funding Setup Report allows you to view the distribution percentage and combo code(s) an employee’s Regular Earnings and Additional Pay are allocated to via Salary Distribution as of a specific as of a specific timeframe.

Report Use

Departments can use the report to identify the percentages charged to combo codes used for a particular pay period. It will show the percentage of earnings charged to each combo code for an employee between the specified start and end dates. The report returns results based on the admin department, not the funding department.

Once a report has been set up, you can reuse the run-control and just change the date. For example, you may want to run the Funding Setup Report monthly for a group of departments. You can set up the report filters once, and every month select the run control and only change the start and end dates.

Report Filters

1. The ‘Start Date’ and ‘End Date’ of the timeframe for the report.
2. Report View. Select either Department or Employee:
   a. **Department** – the funding distribution percentage for each employee in the specified department(s) for the fiscal year within the timeframe entered.
   b. **Department Tree Node** – report can be run at any level of the department tree. Entering a node value will display the funding distribution percentage for all employees within that tree node as of the dates entered.
      i. Note that you do not have to click the ‘Save’ button on this report to select a department node.
   c. **Employee** – the funding distribution percentage charged for a specific employee for the fiscal year within the timeframe entered.
3. Enter the department(s) or employee(s) for which you want to run the report. You can search for departments/employees using the magnifying glass or you can key in the IDs. You can enter as many departments or employees as you want to have on the report. To add extra rows, click on the plus sign.
4. Follow the steps outlined on pages 62-65 to run and view the report.
Funding Setup Report - Report Output
The report returns results based on the admin department, not the funding department.

- **Fiscal Year**: The fiscal year in which the funding is allocated.
- **Employee ID**: The unique PAC ID for the employee.
- **Employee Record**: The record number that is associated with a position/job, e.g., ‘0’ or ‘1’. Employees can have multiple jobs and will thus have multiple Employee Record numbers.
- **Paygroup**: Allows you to determine the pay cycle.
- **Name**: The employee’s name.
- **Annual Salary**: Based on the date the report was generated.
- **Department ID**: The employee’s admin department.
- **Action Date**: When the allocation was approved and committed to PAC.
- **Effective Date**: The date that the allocation is effective as of.
- **Effective Sequence**: The order of items processed on a single effective date.
- **Earn Code**: Earnings Code. The "blank" earnings code field indicates the employee's regular earnings.
- **Budget Sequence**: The sequence of processing of earnings items.
- **Combo Code**: The 10-digit system-generated number representing a unique ChartString.
- **Budget Amount**: The dollar amount budgeted for the item (non-regular earnings only).
- **Distribution Percent**: The percentage of earnings allocated to the combination code.
- **Funding End Date**: The end date for the Salary Profile on the Salary Distribution page in PAC.
- **Source**: J=Job Data; A=Additional Pay.
- **ChartField Data**: The ChartField elements (Business Unit/Account/Department ID (CF)/Business Unit, PC/Project/Project Activity/Initiative/Segment/Site).
Payroll Actuals Report

The Payroll Actuals Report allows you to view the combo code(s) employee earnings were charged to, by employee, as of a specific date. It shows the actual earnings charges and encumbrances for employees between specified start and end dates.

Report Use

Departments can use the report to identify the payroll actuals and encumbrance balances for the employees in the specified departments.

Once a report has been set up, you can reuse the run-control and just change the date. For example, you may want to run the Payroll Actuals Report monthly for a group of departments. You can set up the report filters once, and every month select the run control and only change the start and end dates.

Report Filters

1. The ‘Start Date’ and ‘End Date’. The timeframe of the data.
   a. Important! This report can only be run for a 12-month period. E.g., 1/1/22 – 12/31/22 or 7/1/21 = 6/30/22. If additional timeframes are needed, run the report again for each timeframe. If you are re-using a Run Control ID to generate the next report, wait until the first one is completed before running.

2. Report View. Select either Department, Employee or Department Tree Node:
   a. Department – actuals and encumbrances for each employee in the specified department(s) as of the dates entered. You can also select one of these “Sort by” options from the drop-down menu.
      i. Admin Dept, Combo Code, Emplid.
      ii. Admin Dept, Emplid, Combo Code.
   b. Employee – the actuals and encumbrances for the specified employee(s) between the dates entered.
   c. Department Tree Node: report can be run at any level of the department tree. Entering a node value will display the data for all employees within that tree node as of the dates entered.
   d. Summary – check this box to summarize the output by Earn Code, Combo Code and ChartField. This option displays the total charges to each combo codes, per earn code. It shows the total charged to a combo code for the period entered in the start and end dates.

3. Enter the department(s) or employee(s) for which you want to run the report. You can search for departments/employees using the magnifying glass or you can key in the IDs. You can enter as many departments or employees as you want to have on the report. To add extra rows, click on the plus sign.

4. Follow the steps outlined on pages 62-65 to run and view the report.
Payroll Actuals Report - Report Output

- **Department ID**: The employee’s admin department.
- **Employee ID**: The unique PAC ID for the employee.
- **UNI**: The employee's UNI.
- **Pay Group**: Grouping of employee populations for payroll purposes.
- **Employee Record**: The record number that is associated with a position/job, e.g., ‘0’ or ‘1’. Employees can have multiple jobs and will thus have multiple Employee Record numbers.
- **Employee Name**: The employee’s name.
- **Position Number**: The identification number for the employee’s position in PAC.
- **Position Description**: The description of the employee’s position.
- **Off cycle**: Y = Yes; N = No.
- **Reversed**: Y = Yes; N = No.
- **Pay End Dt**: The end date of the pay period for the specified earnings.
- **Paycheck Nbr**: The corresponding paycheck number will be indicated.
- **Earn Code**: Earnings Code.
- **Combo Code**: The 10-digit system-generated number representing a unique ChartString to where the earnings were allocated.
- **Funding Dept**: The department (indicated by department number) that administers the listed combo code.
- **Earnings Amt**: The dollar amount of earnings allocated to the combo code listed for the specified earnings.
- **Transaction ID**: Will display the Cost Transfer Transaction ID, if applicable. If the earnings were from a regular payroll and did not have a cost transfer made to them a 0 will display.
- **Transaction Type**: Displays the type of transaction for the specified earnings. Can be CT = Cost Transfer or PY = Payroll.
- **Regular Fringe**: The dollar amount of Fringe expense applied to the specified earnings.
- **Addl Fringe**: The dollar amount of Additional Fringe expense applied to the specified earnings.
- **Fringe Total**: The total dollar amount of Fringe applied to the specified earnings.
- **Encumbrance Earnings Amt**: The dollar amount of earnings encumbered for the specified earnings (through the end of the FY).
- **Encumbrance Fringe Amt**: The dollar amount of Fringe expense encumbered for the specified earnings (through the end of the FY).
- **Total Earnings**: The total dollar amount of actual and encumbered earnings (through the end of the FY).
- **Total Fringe**: The total dollar amount of fringe expense (through the end of the FY).
- **ChartField Data**: The ChartField elements (Business Unit/Account/Department ID (CF)/Business Unit PC/Project/Project Activity/Initiative/Segment/Site).
Suspense Detail Report

The **Suspense Detail Report** lists all payroll charges in suspense for a department or set of departments as of a specified date.

Report Use

Departments can use the report to identify payroll charges in suspense, and how long a particular charge has been in suspense.

Once a report has been set up, you can reuse the run control and just change the date. For example, you may want to run the Suspense Detail Report semi-monthly for a group of departments. You can set up the report filters once, and every time select the run control and only change the as of date.

Report Filters

1. The **Pay End Date Range** using the ‘From Date’ and ‘To Date’. The timeframe of the data.
2. **Report Type.** The report can be run at either the summary or the detail level.
3. **Department Tree Node:** report can be run at any level of the department tree. Entering a node value will display the suspense for all employees within that tree node as of the dates entered.
   a. Note that you do not have to click the ‘Save’ button on this report to select a department node.
4. **Individual Department:** report can be run for an individual department. Enter the department(s) for which you want to run the report. You can search for departments using the magnifying glass or you can key in the department ID. You can enter as many departments as you want to have on the report. To add extra rows, click on the plus sign.
5. Follow the steps outlined on pages 62-65 to run and view the report.
Suspense Detail Report - Report Output

- **Pay Begin Dt:** The begin date of the pay period the payroll amount listed is in suspense.
- **Pay End Dt:** The end date of the pay period the payroll amount listed is in suspense.
- **# of Days in Suspense:** The number of days suspense exists based upon the pay end date and the date the report was created.
- **Combo Code:** The 10-digit system-generated number representing a unique ChartString to where the earnings were allocated.
- **Employee UNI:** The employee’s UNI.
- **Employee ID:** The unique PAC ID for the employee.
- **Employee Record:** The record number that is associated with a position/job, e.g., ‘0’ or ‘1’. Employees can have multiple jobs and will thus have multiple Employee Record numbers.
- **Pay Group:** Grouping of employee populations for payroll purposes.
- **Job Function:** A numerical indicator identifying the employee group.
- **Function Description:** The description for the job function code.
  - Job Functions: 01 = Officers of Instruction; 11 = Officers of Research; 21 = Officers of the Libraries; 31 = Officers of Administration; 41 = Student Officers; 51 = Support Staff; 61 = Others.
- **Last Name:** The employee’s last name.
- **First Name:** The employee’s first name.
- **Earn Code:** Earnings Code.
- **Earnings Amt:** The dollar amount of earnings allocated to the combo code listed for the specified earnings.
- **Fringe Amt:** The dollar amount of Fringe expense for the specified earnings.
- **Earnings and Fringe Total:** The total dollar amount of the Earnings and Fringe for the payroll amount in suspense.
- **Check Date:** The end date of the pay period in which the earnings fell into suspense.
- **Funding Dept:** The department (indicated by department number) that administers the listed combo code.
- **ChartField Data:** The ChartField elements (Business Unit/Account/Department ChartField/PC Business Unit/Project ID/Activity Id/Initiative/Segment/Site).
Cost Transfer Reports
The Cost Transfer Reports allow you to view the details of cost transfers, by Admin Department, Department Node, Employee ID, Cost Transfer Initiator or Cost Transfer Transaction ID, as of the selected date range. You can also indicate if you want to view “All Projects” or “Sponsored Projects Only”.

Report Use
Departments can use the report to identify payroll charges in suspense, and how long a particular charge has been in suspense.

Once a report has been set up, you can reuse the run control and just change the date. For example, you may want to run the Cost Transfer Report monthly for a specified group or project or employee. You can set up the report filters once, and every month select the run control and only change the ‘From and To Dates’.

Report Filters
1. The **Date Range** entering a ‘From Date’ and ‘To Date’. The timeframe of the data.
2. **Report Options** – select a radio button to indicate the way the report output is displayed and enter the data accordingly.
   a. **Admin Department** – Report can be run for an individual department as of the dates entered. Enter the department(s) for which you want to run the report. You can search for departments using the magnifying glass or you can key in the department ID. You can enter as many departments as you want to have on the report. To add extra rows, click on the plus sign.
   b. **Department Tree Node**: report can be run at any level of the department tree. Entering a node value will display the cost transfer details for all employees within that tree node as of the dates entered.
   c. **Project ID** – the cost transfer details for each employee for the specified project as of the dates entered.
   d. **Cost Transfer Initiator** – the cost transfer details for each employee created by the specified Initiator as of the dates entered.
   e. **Employee ID** – the cost transfer details for the specified employee as of the dates entered.
   f. **Cost Transfer Transaction ID** – the cost transfer details for the specified cost transfer transaction ID as of the dates entered.
3. **Projects Option**. Select the radio button to see results for ‘All Projects’ or for ‘Sponsored Projects Only’.
4. **Summary Report Only**. Select the radio button to see results by Combo Code or Project ID.
   a. by Combo Code is the default. The output is summarized by combo codes for the project.
   b. by Project ID. The output is summarized by Project ID. The total transferred into and out of a project via cost transfer is displayed.
5. **Process Scheduler Request**. Select either: ‘Detail CT Report’ (PDF only) or ‘Summary CT Report’ (Excel Only).
   a. Detail CT Report format is in PDF only. The report provides the CT detail view.
   b. Summary CT Report is in Excel only. Allows you to quickly see the movement of total dollars transferred. It adds together all line items in a Cost Transfer to display in one row. This summarizes the detail of each pay period into one row per Combo Code or by Project ID.
6. Follow the steps outlined on pages 62-65 to run and view the report.
Cost Transfer Report – Report Output

- **CU Transaction ID** – will display the Cost Transfer Transaction ID, if applicable.
- **Ern Code**: Earnings Code.
- **Combo Code**: The 10-digit system-generated number representing a unique ChartString to where the earnings were allocated.
- **Project ID**: The “UR” or “GG” Project ID number.
- **Requested To %**: The percentage of the cost transfer going to the combo code at time of cost transfer request.
- **Post Processing %**: The actual percentage now allocated to the combo code/project after the cost transfer processed.
- **To Earnings**: The dollar amount of the earnings transferred to the combo code/Project listed.
- **From %**: The allocation percentage before the cost transfer processed.
- **From Earnings**: The total dollar allocation before the cost transfer processed.
- **CT Reason Code**: The reason code selected for the cost transfer.
- **CT Reason Code DESCR**: The description of the reason code selected for the cost transfer.
- **CT Status**: The status for the cost transfer. E.g., ‘Processed’.
- **Min Pay End Dt**: The end date of first pay period indicated in the cost transfer request.
- **Max Pay End Dt**: The end date of last pay period indicated in the cost transfer request.
- **Min Earnings Dt**: The first date of the pay for the earnings in the cost transfer request.
- **Max Earnings Dt**: The last date of the pay for the earnings in the cost transfer request.
- **EMPLID (Employee ID)**: The unique PAC ID for the employee.
- **EMPL RCD (Employee Record)**: The record number that is associated with a position/job, e.g., ‘0’ or ‘1’.
  Employees can have multiple jobs and will thus have multiple Employee Record numbers.
- **Employee Name**: The employee’s name.
- **Employee UNI**: The employee’s UNI.
- **Employee Admin DEPT ID (Department ID)**: The employee’s admin department number.
- **Employee Admin Dept DESCR (Department Description)**: The employee’s admin department name.
- **Initiator UNI**: The UNI of the person who initiated the Cost Transfer.
- **Initiator Name**: The name of the person who initiated the Cost Transfer.
- **Initiator DEPT ID (Department ID)**: The department number of the person who initiated the Cost Transfer.
- **Initiator Dept DESCR (Description)**: The department name of the person who initiated the Cost Transfer.
- **CT Created DT**: The date the Cost Transfer was initiated.
- **Final Approver UNI**: The UNI of the last person to approve the Cost Transfer.
- **Final Approver Name**: The name of the last person to approve the Cost Transfer.
- **Final Approver Dept ID**: The department number of the last person to approve the Cost Transfer.
- **Final Approver Dept DESCR (Department Description)**: The department name of the last person to approve the Cost Transfer.
- **Final Approved DT**: The date the Cost Transfer was last approved.
- **Justification Comments**: The comments entered on the Cost Transfer.

This report output data reflects the Sponsored Projects section of the cost transfer:

- **New Hire**: Y or N.
- **Rehire**: Y or N.
- **PI Name(s)**: The name(s) of the Principal Investigator(s) for the project.
- **Date of Discussion**: The date of discussion entered in this field on the cost transfer request.
- **Document Location**: The text entered in the cost transfer indicating where the documents are kept.
- **Agreement Confirmed**: Y or N.
Pushed Reports and Emails

Pushed Report Data by Email

In addition to accessing the MSS, HR Manager and Labor Accounting Reports, there is report data that is system generated and sent to you via email notification.

Pushed Report Data

1. **Casual 560 Hours Report** - this report is sent monthly and includes all casual employees who have worked 420 hours or more. Reference the Casual Hires FAQs (http://hr.columbia.edu/casual-hires-faqs) on the HR Website for more information.

2. **Upcoming Visa/Permit Expiration Date** - this report is sent monthly and 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. Note that this is also a HR Manager Report and can be generated at will.

3. **Suspended Employees** - this report is sent weekly and displays employees who have been "hotlined", the emergency process to stop someone’s pay. Be sure to submit the PAF to HRPC that indicates the official status of the employee.