Human Resources Reporting
This training guide provides you with the steps to generate reports on employee, job, payroll and labor accounting data within the HR system.

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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.

Within the University Data Store (UDS) is the HR Data Store. The HR Data Store is the location of the HR Manager Reports, Manager Self-Service Reports and Labor Accounting 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.
HR Manager Reports
HR Manager reports provide detail on employee and job data to help you in managing your day to day activities. Access to HR Manager Reports is provided to the following PAC roles:

- Manager Self-Service
- Manager Reporter

PAC Reports
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. 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 and Labor Accounting Reports are located in PAC.

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

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

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.

This guide will show you how to generate the HR Manager, Manager Self-Service and Labor Accounting Reports.
HR Manager Reports
Available reports are:

1. Active Positions and Incumbents Report
2. Active Positions Report
3. Daily Attestation Report (for COVID)
4. Department On Campus Activity Report
5. Department Reopen CU Compliance Report
6. Employee Personal and Job Data Report by Bargaining Unit
7. Employee Personal and Job Data Report by Job Function
8. Employee Personal and Job Data Report by Job Function with Columbia University Title
9. Employee Personal and Job Data Report by Position Department
10. Employee Personal Data Report by Bargaining Unit
11. Employee Personal Data Report by Job Function
12. Employee Vacation Accrual
13. Post-Docs Demographics Report
15. Termination Report
16. Upcoming/Past Appointment End Date Report
17. Upcoming/Past Visa/Permit Expiration Date Report
Access HR Manager Reports

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

1. Log in to myColumbia with your UNI and Password.
2. Click on the “HR Manager Resources” tab.
3. Select the ‘HR Manager Reports’ link below the ‘Reports’ section on the page.
3a – HR Reports Only Users
The Launchpad is located on the Home tab and is a dashboard that displays recently run reports. Note that scheduling is not used with HR reports.

The Documents tab is where you can see the list of available reports.

If you do not see the reports displayed in the left menu, look for the ‘Folders’ item on the bottom of the page and click it to expand the menu and see the items within.

3b – Finance and HR Users
If you also have access to Finance reports, the landing page is the Finance Launchpad. The Launchpad provides a quick view of scheduled and recently run Finance reports. It does not display details for other reports, e.g. HR.
Select a Report

Click the “Documents” tab and then click the **HR folder** (within the folder menu bar on the left) to view the report list. If you do not see the suites of reports, scroll down to the end of the left menu to expand the ‘Folder’ bar by clicking on it. All of the available reports for HR are displayed. To access a report, double-click the report and the report displays (if no additional parameter entry is required). If parameter selections are required, the options box appears first.

The reports are initially displayed in HTML format and there are options to export and save the file in Excel, PDF or Comma delimited if you so choose.

If the reports do not automatically display upon clicking the Documents tab, click the plus sign next to the ‘Public Folders’ in the Folders section of the left menu 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.

**Sometimes**, the folder bar moves to the bottom of the left menu. If you do not see the suites of reports, scroll down to the end of the left menu and click the ‘Folder’ bar to expand it and see the HR folder.
Reports without Parameters

Once a report is selected, it either generates upon selection and displays the information 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 menu to display the description.
Reports with Parameters

Here is an example of a report that requires parameters be selected before it can be generated. The parameters differ depending upon the report. When you double click on the report name, the report’s parameter entry screen is displayed.

Items with a red arrow indicate that a selection must be made. Once all selections are made, the red arrow changes to a green check mark and the “OK” button becomes active and the report can be run.

Items with a green check mark indicate that a choice was defaulted. Defaulted entries can be changed as needed. For example, for Admin Department (Number), the default setting returns data for all departments you have access to view. To select a specific department, click the Refresh Values icon on the right side of the screen then double-click the desired Department value. Or, enter the seven-digit department number in the “Type values here” box and then click the right facing arrow to select one specific department. Follow this same process for any prompt selection where a different choice than what defaulted is needed.
Saving Parameters Prompts for Future Report Runs
This feature allows you to save frequently used prompts. After you enter the selection criteria, click the “create prompt variant icon” which is the disc icon with the green plus sign above the parameter selection box. Then enter a name for the report and click “OK”.

To use the created variant, when you open a new report, click the drop-down arrow on the ‘Available prompts variants’ box and select the variant you created. The already selected prompts that were saved will be used to generate the report.
Save a Report
Use the Export Document dropdown list to save the report to your computer. Do not use the “save icon”.

- Click the Export Document icon.
- Select the “Reports” radio button. To view the data in Excel, select File Type = ‘xlsx’.
- Open the exported report.
- 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).

If using Internet Explorer, 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’.
Print a Report

Click on the Printer Icon on the menu bar and the report appears in “PDF” format from which you can print.

![Print Icon]

Click the Printer icon to print a report

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 toolbar is a ‘Refresh’ icon. As HR Manager Reports contain ‘day old data’, the information is updated nightly and clicking this icon will not return any newer results.
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 in administrative departments whose data you have access to view.

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 data selection to generate.

Report Results

The report results show:

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

<table>
<thead>
<tr>
<th>Position No.</th>
<th>Position Desc.</th>
<th>Salary Admin Plan Code</th>
<th>Job Code</th>
<th>DeptID</th>
<th>Department Name</th>
<th>Grade</th>
<th>Max Head Count</th>
<th>Head Count – if 0 then New or EMP is termed</th>
<th>Full/Part Time</th>
<th>Std Hrs</th>
<th>Work Location</th>
<th>Incumbent Employee ID</th>
<th>Incumbent Name</th>
<th>Manager Position No.</th>
<th>Manager Position Desc.</th>
<th>Manager Name</th>
</tr>
</thead>
</table>

12/19/2017
Active Positions Report

Report Description

This report displays all active University positions that are vacant or filled in administrative departments whose data you have access to view.

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 (or occupied) 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 data selection to generate.

Report Results

The report results show:

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

12/19/2017

Active Positions Report

NOTE: BY ACCESSING THIS DATA YOU AGREE TO ADHERE TO UNIVERSITY POLICY ON CONFIDENTIALITY OF SENSITIVE DATA
Daily Attestation Report

Report Description

This report displays COVID related attestation data for employees in the selected administrative department(s) for a 21-day rolling period. Data cannot be obtained on attestations more than 21 days from the date you run the report.

Report Use

This report provides data for employees who swiped in on campus and shows their completion status for COVID-related activities such as training, the Compact, daily attestation and Gateway Test completion.

Report Parameters

This report requires data to be selected. Green check marks next to a prompt indicate optional values. Red arrows indicate a selection must be made. Confirm and/or enter prompt values, then click on the “OK” button on the bottom of the screen.

- Attestation Create Start Date
- Attestation Create End Date
- Attestation Status Code
- Admin Department (Number)/Admin Department Description
- UNI and Employee Name

Attestation Create Start Date:

Select a start date for the data. As the report provides data on a rolling 21-day basis, dates entered over 21 days in the past will return data beginning 21 days prior only. 

Attestation Create End Date: Select an end date for the data.

Attestation Status Code:

Click on the “Attestation Status Code” prompt. After clicking this, click the “Refresh Values” link and the status code options will appear. Select the value you want and then click the right facing arrow to make the selection. Or double-click on the desired value and it will be added.

Admin Department (Number)/Admin Department Description:

The default setting returns data for all departments you have access to view. To limit the data, click the Refresh Values icon on the right side of the screen then double-click on the desired Department. You may do this also for the Department Description prompt.

UNI and Employee Name:

The default setting returns results for all employees. To limit the data, click the Refresh Values icon on the right side of the screen then double-click on the desired UNI. You may do this also for the Employee Name prompt.
Report Results

The report results show:

- Employee ID
- UNI
- Name
- Title
- Admin Department Number, Admin Department Description
- Latest Attestation Status Code
- Attestation Start Date
- Attestation Start Time
- Attestation End Time
- Training Complete
- Compact Signed
- Gateway Test Complete
- Location, Location Description
- Office Address
- Reports To
- Job Function, Job Function Description
- Union Code, Union Description
Department On Campus Activity Report

Report Description

This report displays COVID related data for the employees on campus and their COVID related activities such as training, the Compact and Gateway Test completion. Data cannot be obtained on attestations more than 21 days from the date you run the report.

Report Use

This report is helpful when determining employees who were physically on campus and the completion status of their COVID related activities.

Report Parameters

This report requires data to be selected. Green check marks next to a prompt an optional value. Red arrows indicate a selection must be made. Confirm and/or enter prompt values, then click on the “OK” button on the bottom of the screen.

- *Start Event Date
- *End Create End Date
- Admin Department (Number)/Admin Department Description
- UNI

Start Event Date:

Select a start date for the data. As the report provides data on a rolling 21-day basis, dates entered over 21 days in the past will return data beginning 21 days prior only.

End Event Date: Select an end date for the data.

Admin Department (Number)/Admin Department Description:

The default setting returns data for all departments you have access to view. To limit the data, click the Refresh Values icon on the right side of the screen then double-click on the desired Department. You may do this also for the Department Description prompt.

UNI: The default setting returns results for all employees. To limit the data, click the Refresh Values icon on the right side of the screen then double-click on the desired UNI.

Report Results

The report results show:

- Employee ID, UNI, Name, Title
- Admin Department (Number), Admin Department Description
- Location, Location Description, Office Address
- Reports To, Job Function, Job Function Description
- Union Code, Union Description
- On Campus (provides date)
- Attestation Status, Training Complete, Compact Signed, Gateway Test Complete
Department ReopenCU Compliance Report

Report Description

This report displays COVID related data for all employees in your department(s) and their COVID-related activities such as training, the Compact and Gateway Test completion.

Report Use

This report overall compliance of employee’s COVID related required activities.

Report Parameters

This report provides defaulted selections. Confirm and/or enter different prompt values, then click on the “OK” button on the bottom of the screen.

- Overall Compliance Status
- Admin Department (Number)
- Admin Department Description
- UNI
- Employee Name

Overall Compliance Status:

Select a start date for the data. As the report provides data on a rolling 21-day basis, dates entered over 21 days in the past will return data beginning 21 days prior only.

Admin Department (Number)/Admin Department Description:

The default setting returns data for all departments you have access to view. To limit the data, click the Refresh Values icon on the right side of the screen then double-click on the desired Department. You may do this also for the Department Description prompt.

UNI and Employee Name:

The default setting returns results for all employees. To limit the data, click the Refresh Values icon on the right side of the screen then double-click on the desired UNI. You may do this also for the Employee Name prompt.

Report Results

The report results show:

- Employee ID, UNI, Name, Title
- Admin Department (Number), Admin Department Description
- Location, Location Description, Office Address
- Reports To, Job Function, Job Function Description
- Union Code, Union Description
- Training Complete, Compact Signed, Gateway Test Complete, Overall Compliance Status
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 in 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 requires data to be selected. Green check marks next to a prompt indicate a defaulted or selected value. Red arrows indicate a selection must be made. Confirm and/or enter prompt values, then click on the “OK” button on the bottom of the screen.

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

Admin Department Number (Start & End):

The default setting returns data for all departments you have access to view. To limit the data, click the Refresh Values icon on the right side of the screen then double-click on the desired Department.

Bargaining Unit:

Click on the “Bargaining Unit Name” prompt. The “%” sign defaults 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 on the right side of the screen. Select the Bargaining Unit in the middle of the screen and then click the right facing arrow to include the selection. Or you can double-click on the desired value and it will be added.

Employee Status:

Three employee statuses (A; L; P) are selected as the default. To limit the list, click on the “Employee Status” prompt. After clicking this line, the employee statuses, A = Active; P = Paid Leave; 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 right side of box and then click the left facing arrow to remove the selection.
Employee Personal and Job Data Report– by Bargaining Unit, cont.

Select Term:

Click on the “Select Term” prompt. After clicking this, 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:

- 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
- 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
- Leave through Date
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 in 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 requires data to be selected. Green check marks next to a prompt indicate a defaulted or selected value. Red arrows indicate a selection must be made. Confirm and/or enter prompt values, then click on the “OK” button on the bottom of the screen.

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

Admin Department Number (Start & End):

The default setting returns data for all departments you have access to view. To select a specific department, click the Refresh Values icon on the right side of the screen then double-click the desired Department value. Or, enter the seven-digit department number in the “Type values here” box and then click the right facing arrow to select one specific department.
Employee Personal and Job Data Report – by Job Function, cont.

**Job Function:**

All job functions (%) are selected as the default. To select a specific job function, click on the “Job Function” prompt and then click the Refresh Values options on the right side of the screen then click on the desired Job Function (01, 11, 21, 31, 41, 51, or 61). 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.

**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

**Employee Status:**

Three employee statuses (A; L; P) are selected as the default. To limit the list, click on the “Employee Status” prompt. After clicking this line, the employee statuses, A = Active; P = Paid Leave; 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 right side of box and then click the left facing arrow to remove the selection.

**Select Term:**

Click on the “Select Term” prompt. After clicking this, 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.

Select/enter a value for each prompt

Click “OK” to produce the report
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
- 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
- Leave through Date
Employee Personal and Job Data Report – by Job Function with Columbia University Title

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 in PAC. It is similar to the Employee Personal and Job Data Report – by Job Function described above and contains the additional column of the Columbia University Title for the employee.

Reference the Employee Personal and Job Data Report – by Job Function above for the steps on how to generate this report.
Employee Personal and Job Data Report– by Position Department

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

Report Use
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 Parameters
This report requires data to be selected. Green check marks next to a prompt indicate a defaulted or selected value. Red arrows indicate a selection must be made. Confirm and/or enter prompt values, then click on the “OK” button on the bottom of the screen.

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

Position Department Number (Start & End):
If you keep the Default settings, the report returns data for those who have positions in your departments but an admin department that you do not have access to.

If you choose to limit the department list you can do so by clicking the Refresh Values options on the right side of the screen then double-clicking on the desired Department value. Or, to enter a specific department, click on “Enter Position Department Number” (Start) and “Enter Position Department Number (End)” prompts and after clicking each, enter the seven-digit department number in the “Type values here” box and then click the right facing arrow to select the department.
Employee Personal and Job Data Report– by Position Department, cont.

**Job Function:**

All job functions (%) are selected as the default. To select a specific job function, click on the “Job Function” prompt and then click the Refresh Values options on the right side of the screen then click on the desired Job Function (01, 11, 21, 31, 41, 51, or 61). 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.

**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

**Overall Employee Status and Employee Status:**

Overall Employee Status is the overall University status and applies to those who hold multiple jobs. Employee Status is job specific. The employee statuses of A; L; P & S are selected as the default. To limit the list, click on the respective prompt and the statuses, A = Active; P = Paid Leave; L = Leave of Absence, S = Suspended, display in the middle of the screen and are selected. To remove one of the statuses, click the status letter in the right side of box and then click the left facing arrow to remove the selection.

**Select Term:**

Click on the “Select Term” prompt. After clicking this, 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 Position Department, cont.

Report Results

The report results show:

- Employee ID
- Admin Department Name, Admin Department Number
- Employee Name, Position Department Name, Position Department Number
- Original Hire Date, Service Date
- First Tenure Position Date
- Gender
- DOB
- Ethnic Group, Ethnic Group Description
- Highest Degree, Degree Name, Degree Year, Degree Institution
- Home ZIP
- Email
- Office Address Line 1, Line 2, Line 3, City, State and ZIP Code, Office Phone Number
- Term Year
- Position Number, Position Status, Position Status Description
- Work Location, Work Location Description
- US Citizen, Visa Expiration Date
- Tenure Status, Tenure Status Description, Tenure Date
- Active Positions
- Position Entry Date
- Appointment End Date
- Job Code, Job Description, Job Effective Date, Job Family Code, Job Function, Job Family
- 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
- Leave through Date
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 in PAC.

Report Use

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

Report Parameters

This report requires data to be selected. Green check marks next to a prompt indicate a defaulted or selected value. Red arrows indicate a selection must be made. Confirm and/or enter prompt values, then click on the “OK” button on the bottom of the screen.

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

Admin Department Number (Start & End):

The default setting returns data for all departments you have access to view. To select a specific department, click the Refresh Values icon on the right side of the screen then double-click the desired Department value. Or, enter the seven-digit department number in the “Type values here” box and then click the right facing arrow to select one specific department.
Employee Personal Data Report – by Job Function

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

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

Report Parameters
This report requires data to be selected. Green check marks next to a prompt indicate a defaulted or selected value. Red arrows indicate a selection must be made. Confirm and/or enter prompt values, then click on the “OK” button on the bottom of the screen.

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

Admin Department Number (Start & End):
The default setting returns data for all departments you have access to view. To select a specific department, click the Refresh Values icon on the right side of the screen then double-click the desired Department value. Or, enter the seven-digit department number in the “Type values here” box and then click the right facing arrow to select one specific department.
**Employee Status:**

Three employee statuses (A; L; P) are selected as the default. To limit the list, click on the “Employee Status” prompt. After clicking this line, the employee statuses, A = Active; P = Paid Leave; 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 right side of box and then click the left facing arrow to remove the selection.

**Bargaining Unit:**

Click on the “Bargaining Unit Name” prompt. The “%” sign defaults 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 on the right side of the screen. Select the Bargaining Unit in the middle of the screen and then click the right facing arrow to include the selection. Or you can double-click on the desired value and it will be added.

**Select Term:**

Click on the “Select Term” prompt. After clicking this, 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.

Select/enter a value for each prompt

Click “OK” to produce the report
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, cont.

Job Function:

All job functions (%) are selected as the default. To select a specific job function, click on the “Job Function” prompt and then click the Refresh Values options on the right side of the screen then click on the desired Job Function (01, 11, 21, 31, 41, 51, or 61). 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.

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

Employee Status:

Three employee statuses (A; L; P) are selected as the default. To limit the list, click on the “Employee Status” prompt. After clicking this line, the employee statuses, A = Active; P = Paid Leave; 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 right side of box and then click the left facing arrow to remove the selection.

Select Term:

Click on the “Select Term” prompt. After clicking this, 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.

Select/enter a value for each prompt

Click “OK” to produce the report
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 data selection to generate.

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 requires data to be selected. Green check marks next to a prompt indicate a defaulted or selected value. Red arrows indicate a selection must be made. Confirm and/or enter prompt values, then click on the “OK” 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” (Begin) and “Department Range (End)” lines on the screen. After clicking each prompt, enter the seven-digit department number in the text box in the middle of the screen.

The Default settings, (0000000) and (9999999), returns data for all departments and associated information you have access to view.

After Title Effective Date:
Click on the “After Title Effective Date” prompt and then click the calendar icon to the right 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 - available May - July to users with e-Comp Report Access

Report Description
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.

Report Use
This report is useful when preparing for and administering e-Comp for the annual merit increases.

Report Parameters
This report requires one prompt to be entered. Below is a screen print of the selection screen. 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 “OK” 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 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
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 requires data to be selected. Green check marks next to a prompt indicate a defaulted or selected value. Red arrows indicate a selection must be made. Confirm and/or enter prompt values, then click on the “OK” button on the bottom of the screen.

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

Department Range (Start & End):

The default setting returns data for all departments you have access to view. To select a specific department, click the Refresh Values icon on the right side of the screen then double-click the desired Department value. Or, enter the seven-digit department number in the “Type values here” box and then click the right facing arrow to select one specific department.
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 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.

![Select/enter a value for each prompt](image)

Click “OK” to produce the report

Report Results

The report results show:

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

![Select/enter a value for each prompt](image)
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 data selection to generate.

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 date approached/is approaching.

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

Report Results
The report results show:

- Position Department (Number)
- Admin Department (Number)
- Employee ID
- Name
- Position Title
- Visa End Date
- Visa Type
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.
Manager Self-Service and Labor Accounting Reports - Access PAC Reports

Labor Accounting and MSS reports reside in the HR Data Store and are accessed via the myColumbia portal.

1. Log in to myColumbia.
2. Click on the “HR Manager Resources” tab.
3. Select “People @ Columbia Manager Self-Service Reports, or Labor Accounting Reports within the Reports Section.

**Note** that the Payroll Reports link in the Reports section is for Finance (FDS) payroll reports and not HR data.

When in PAC, you can navigate to these report suites from the Homepage using Tiles. Select the Manager Self-Service tile and then the Manager Reports tile. Expand the menu to select a report.

or you can use the navigation menu: Main Menu > Manager Self Service > Manager Reports. Expand the menu to select a report.
Manager Self-Service Reports and Queries - Location
Manager Self-Service Reports and Queries are located 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 Parameters
These reports require entry of additional parameters. 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 all employees
• Name: Enter the specific employee's name or type "%" to search all employees

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:
  o Enter the year of earnings to view or % to view all available years in the PAC database – History report
  o Enter the Fiscal Year of earnings to view (% option not applicable) – FY History report

Step 3 – Click ‘View Results’
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

- **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

By Employee
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 Parameters**

These reports require entry of additional parameters. 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 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 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

<table>
<thead>
<tr>
<th>Dept ID</th>
<th>UNI</th>
<th>Name</th>
<th>ID</th>
<th>Co Group</th>
<th>Pay Period End</th>
<th>Check Dt</th>
<th>Off Cycle</th>
<th>Form ID</th>
<th>Check Nbr</th>
<th>Tot Gross</th>
<th>Total Taxes</th>
<th>Total Ded</th>
<th>Net Pay</th>
<th>DDA Suppressed</th>
</tr>
</thead>
</table>

By Employee

<table>
<thead>
<tr>
<th>Dept ID</th>
<th>UNI</th>
<th>Name</th>
<th>ID</th>
<th>Co Group</th>
<th>Pay Period End</th>
<th>Check Dt</th>
<th>Year</th>
<th>Off Cycle</th>
<th>Form ID</th>
<th>Check Nbr</th>
<th>Sum Tot Gross</th>
<th>Sum Total Taxes</th>
<th>Sum Total Ded</th>
<th>Sum Net Pay</th>
<th>DDA Suppressed</th>
</tr>
</thead>
</table>

- **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.
Labor Accounting Reports and Queries - Location
Labor Accounting Reports are located in the Manager Reports folder within Manager Self Service.

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

Each report has slightly different parameters, 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 parameters, 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 parameters 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.

![Screenshot of Process Monitor](image)

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.

![Screenshot of Process Monitor](image)

Step 7 – View the Report. Once the report has run successfully, you can view it as either a PDF or export it as a .csv file into Excel.

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 either the .PDF file or the .CSV file.

![Screenshot of Process Detail](image)

The following pages will show you the set-up parameters 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 parameters once, and every month select the run control and only change the “as of date”.

Report Parameters
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 23-27 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
- Priority:
- Fringe Code: The code for the fringe type
- Description: The description of the fringe type
- Fringe Rate: The fringe rate applicable to the individual
- ChartField Data: The ChartField elements (BU/Account/Dept/PCBU/Project/AC/Init/Segment/Site
- OT 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 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 parameters once, and every month select the run control and only change the start and end dates.

Report Parameters
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 23-27 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 run
- **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 item
- **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 entered into 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 parameters once, and every month select the run control and only change the start and end dates.

Report Parameters
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. 1/1/21 – 12/31/21 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 of time 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 23-27 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 parameters once, and every time select the run control and only change the as of date.

Report Parameters
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 23-27 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 parameters once, and every month select the run control and only change the ‘From and To Dates’.

Report Parameters

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 23-27 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
Additional Report Access via myColumbia – ARC Portal

Dependent upon your security authorization and thus which reports suites are available for you to access, additional access points appear in myColumbia. Each link provides access to a specific portal area.

Within the ARC portal, the Reporting Quick Links section provides access to real-time and data store financial reports.

Within the ARC portal, the Legacy Reporting section provides access to DARTS and other legacy reports.
Additional Report Access via myColumbia – Enterprise Reporting Portal

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:

- Click on the “BI Launch Pad” link within the Reports section.
- Click on the ‘Documents’ tab on the top of the page. (The ‘Home’ tab displays on the Launchpad).
- Click the plus sign next to the ‘Public Folders’ link to expand the reports types.
- 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. **Note:** if you have access to other report areas, they will appear in the Public Folder list.