Manager Self Service (MSS)
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Manager Self Service (MSS)

This is the Manager Self Service course within the PAC curriculum.

Estimated Time to Complete Lesson: 45 minutes

As a new user, there are several steps required to obtain access to the PAC system.

1) If you haven’t already done so, complete the PAC Security Application to request your PAC role(s). Once the application has been approved, you will be notified and receive more information on how to access and complete the training requirements from the PAC Training Administrator. Click here (http://hr.columbia.edu/forms-docs/pac-security-handbook) for guidance on PAC Security and Access Requests.

2) For the Manager Self-Service role, a knowledge assessment is not required. For other roles a Knowledge Assessment/ Training Acknowledgement at the end of the course must be completed. A score of 90% or better is required for passing knowledge assessments.

3) For roles that require a Knowledge Assessment for the training course, please notify the PAC Training Administrator once the training requirements are completed. You will receive an e-mail from PAC Security once your access is established.

PAC Curriculum

This is the PAC curriculum. The course you are completing is part of this curriculum.
Introduction to Manager Self Service (MSS)

This is the Introduction to Manager Self Service (MSS) lesson of the Manager Self Service (MSS) course. Upon completion of this lesson, you will be able to:

- Access and Navigate MSS
- Use navigation elements and searches
- Establish printer settings for printing online information

Estimated Time to Complete Lesson: 10 minutes

What is Manager Self-Service

**What is Manager Self Service (MSS)?**
Manager Self Service, or MSS, is a portion of the People@Columbia (PAC) system that allows managers to view job and personal data for the employees in their departments granted via the application process. Access to MSS is targeted to Columbia University department administrators.

In addition to viewing job and personal information, a user of Manager Self Service can print reports that display recent changes to employee records, departmental payroll register and departmental earnings registers. It is in MSS that you are able to print a Personnel Action Form (PAF) which is needed to make changes to an employee's record that cannot be completed electronically.

Access and Navigate MSS

**Navigate to Manager Self Service**
Click on the Main Menu to view folders and then expand the "Manager Self-Service" folder. MSS functions are located in this section within the following folders:
Job and Personal Information
- Individual Job Summary
- View Employee Personal Info
- Terminate Employee (if you also have eTerm access)

Manager Reports
- Labor Accounting Reports
- Manager SS (Self Service) Reports

To access MSS, first log into the myColumbia portal (@ https://my.columbia.edu) using your UNI and password. Then follow the steps below.

1. Click the “HR Manager Resources” tab
2. Click the “Go to PAC” link under the People@Columbia section
Access the How to Navigate PAC and How to Create Favorites in PAC job aids located in the Course Catalog (http://hr.columbia.edu/course-catalog/search) on the HR Website for information on navigating files, folders and links within PAC.

Access MSS

Let's practice accessing MSS. Once you are logged in to the myColumbia portal and on the HR Manager Resources page, you can get to PAC and navigate to MSS.

Procedure

This is the "Access MSS" topic where you will learn how to access Manager Self Service.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | First let's navigate to the myColumbia portal.  
      | Click in the **URL** field.  
      | ![URL Field](http://www.columbia.edu/) |
| 2.   | Enter the URL for the myColumbia portal. Enter "my.columbia.edu". |
| 3.   | Press **[Enter]**. |
| 4.   | Click the **Log In Now** button.  
      | ![Log In Now Button](mycolumbia.png) |
Step | Action
---|---
5. | Enter your UNI and Password.
   First, click in the **UNI** field.

6. | Enter your UNI into the **UNI** field. For this example enter "**bm2559**".

7. | Next, click in the **Password** field.

8. | Enter your password into the **Password** field. For this example enter "**welcome1**".

9. | Click the **LOGIN** button.
### Step 10

You are now in the myColumbia portal.

Click the **HR Manager Resources** link.

**HR Manager Resources**
11. You are now on the HR Manager Resources page. The link to PAC is located further down on the screen. Click and drag the **scroll bar** down to view the People@Columbia section on the page. Then release the mouse button.

12. On this page are PAC notices which provide helpful information regarding any active issues. There is also a link to view active issues from prior weeks.

---

13. To enter PAC, click the **Go to PAC** link in the "People@Columbia" section of the page. **Go to PAC**

14. The **Favorites** and **Main Menu** appear on the top.

You can navigate PAC by either clicking on the **Main Menu** drop-down arrow in the top navigation bar or by expanding the Main Menu on the left side by clicking the downward facing triangle to view the options.
15. Let's navigate from the top navigation menu.
   Click the **Main Menu** button.

16. Here you see the Manager Self Service folder.
   Click the **Manager Self Service** menu to expand the menu.

17. Click the **Job and Personal Information** menu.

18. Once the menu is expanded you will see the available pages within that folder. Click on a link to go to that page.

   Within Job and Personal Information are the Manager Self Service pages:
   - Individual Job Summary
   - View Employee Personal Info
   - Terminate Employee (if you also have eTerm access)

   Template-Based Hire is also located within the Manager Self Service/Job and Personal Information section.

   To open a page, click on the link. For this example click the **View Employee Personal Info** link.

19. You arrived at the View Employee Personal Information page. Note the navigation path appears in the top menu.

20. You have successfully completed the "Access MSS" topic. You can now move on to the next lesson, "Sign Out of MSS" where you will learn how to sign out of MSS.

---

**Sign Out of MSS**

**Sign Out of MSS**

Once you are logged into PAC, simply click the "Sign Out" button in the upper right hand corner to log out of the system.
Important! For security purposes, it is important that you sign out when you are finished with your PAC session rather than simply closing the browser window. Other users may be able to access your cached homepage if you do not sign out properly.

For security purposes, PAC automatically logs a user out of his/her application after 30 minutes of inactivity. Two minutes prior to session timeout, the system provides a warning that the browser session is about to expire.

Sign Out of MSS

Let's practice signing out of MSS.

Procedure

This is the "Sign Out of MSS" topic where you will learn how to sign out of Manager Self Service.
Step | Action
1.  | To sign out of MSS, click the **Sign out** link.
2.  | While working in Manager Self Service, multiple windows may be opened. When you are done, be sure to Sign Out of and close each open window.
   
   This will prevent other people who use the computer from being able to access your information.
3.  | You have successfully completed the "Sign Out of MSS" topic. You can now move on to the next lesson, "Navigating Manager Self Service" where you will learn how to navigate in MSS.

**End of Procedure.**

**Navigating Manager Self Service**

**Navigating Manager Self Service**

Using the Manager Self Service module is similar to browsing web pages, which provides a simple, intuitive way of working with information in a database. There are five types of navigation.

1)  **A Navigation Menu** is located on the left side of every page.

2)  **File folders and Pages** -- Folders consist of sub-folders that contain groups of pages on a specific topic. Pages display information about a specific topic like your personal information or paychecks.
3) **A Navigation Header** that is at the top of every page, and includes the following navigational tools: Home, Add to Favorites, Sign Out and Worklist (for approvers only).

4) **A Page Bar**, which allows you to open an additional new window.

5) **Buttons and Key Board Shortcuts** help you process a transaction.

Navigation and Main Menu

**Navigation and Main Menu**

PAC provides both a horizontal menu bar across the top of the screen as well as a vertical left hand menu to navigate to the various applications and pages. The horizontal menu shows items in a cascading format that expands to the right and you can click on any of the folders or pages that display. The vertical menu expands with each click to navigate to the desired location.

The Manager Self Service menu consists of a folder with sub-folders that contain pages of information organized by topic. Expanding and collapsing these folders is the primary means of getting around the application.
There is a Search field available on the top of the Menu to help you locate the page you cannot find in the folders and pages. Simply enter key words of the needed page and click the search arrows. See the "Performing Searches" lesson for additional information.

Folders and Pages

**Folders and Pages**
Folders consist of sub-folders that contain groups of pages on a specific topic. There are links at the bottom of some pages to move to a related page or a parent page. Pages display information about a specific topic such as job information or personal information (addresses, phone numbers, etc).

**Linking to Related Pages**
You will see pages that have links to related pages such as their parent page. The related links often but not always appear at the bottom of the page. For example, you might see the phrase "Return to:" along with the related links at the bottom of a page. This convenience enables you to move easily to related pages to enter data without going through the navigation menu again.
Navigation Header

The navigation header is located at the top of each page and contains four links: 1. Home, 2. Worklist, 3. Add to Favorites, and 4. Sign out.

Link Descriptions:

1. Click the Home link to return to the Home page (the landing page when you first logged in)
2. For approvers only. Use the Worklist link to display the Worklist page. When a transaction is routed in the workflow, it is put into the worklist. The Worklist is a shared PAC page that displays all transactions pending your approval. Click this page to see the list of work items. Transactions that appear in your Worklist are determined by both your department access and your approval authority (e.g. Accounting Approver Level 1)
3. Click the Add to Favorites link to bookmark a frequently accessed folder or page. Once a page is added as a favorite, it is maintained under the "Favorites" menu item
4. Click the Sign Out link to sign out of the application and you will be returned to the Sign In page

Important! For security purposes, it is important that you sign out when you are finished with your PAC session rather than simply closing the browser window. Other users may be able to access your cached homepage if you do not sign out properly.
Page Bar

**Page Bar**
Just below the navigation header sits the Page Bar, which is a series of links and buttons. For Manager Self Service, “New Window” and “Personalize Page” are the only available options.

**New Window**
Once you navigate to a PAC page, the Page Bar displays a "New Window" link. This allows you to open another PAC page on a separate tab without closing the current window. This is helpful when there is a need to remain on a page while researching on other PAC pages in the system.

- Multiple windows can be opened as needed using the "New Window" link
- The new windows display as new browser window tabs
- Click the "X" in the upper right hand corner of the browser window to close the additional windows
- Click the "Sign Out" link to log out of the PAC system
Help
Click the Help link to access training materials and simulations. It will present you with training information relevant to the PAC page you are on at the time. You can also expand the items to view all training topics (available soon)

Personalize Page
Once you navigate to a PAC page, the Page Bar displays a "Personalize Page" link. This allows you to change the tabbing order when you use the “tab” key to move around the screen. Select the radio button next to the desired option and then click the numbered links of the items to reorder. The numbered links are located next to items that can be reordered on the page.
Using Buttons and Keyboard Shortcuts

There are many useful buttons and keyboard shortcuts to help you process transactions. If the action is truly an action, such as save or edit, it appears as a button. In general, if the action to be performed is related to navigation, it appears as a link, which you can click to move to another page. The section below outlines the most common buttons and keyboard shortcuts.

**Buttons**

The following buttons are used for processing your data transactions.

- **Add**

  Click to add new data.
Click to edit existing data.

**Save**

Click to save your data. If you attempt to leave the page without saving by clicking another folder from the navigation menu, a save warning should appear. Click OK to return to the page to save your changes. Click Cancel to exit the page without saving. *There are, however, other ways to exit a page. In these cases, the system issues no save warning:*

- Clicking the Back button in the browser menu (although this is not recommended). *In some browsers, you can return to the page with your edits intact by clicking the Forward button*
- Closing the browser session

**Cancel**

Click to cancel the data you entered.

**Delete**

Click to delete the data you entered.

**Keyboard Shortcuts**

There are a few keyboard navigation alternatives to using the mouse. When the keyboard shortcut is pressed, the designated actions occur. The following lists the button and hot keys most commonly used in the application.

<table>
<thead>
<tr>
<th>Action</th>
<th>Keyboard Shortcuts</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keyboard Shortcut List</td>
<td>CTRL+K</td>
<td>When on a search or data page, accesses the page that is one level up.</td>
</tr>
<tr>
<td>Open/Close Navigation Menu</td>
<td>CTRL+Y</td>
<td>Toggles the navigation menu between collapse and expand.</td>
</tr>
</tbody>
</table>

**Performing Searches in PAC**

**Performing Searches in PAC**

PAC 9.2 provides a powerful search engine to assist in locating pages and transactional data.

**Using the Search Feature in the Menu (to search for a menu item)** - When searching for page locations, enter text in the "Search Menu" field directly underneath the Main Menu link in the top menu. For example, to search for the "Cost Transfers"
Within certain PAC transactions, there are search pages to locate existing information or employees. To search for existing transactional data in PAC, enter text into the displayed fields. When searching for existing values, you do not need to populate every field to complete the search. For certain fields, the look up glass can be used to search for a field value, e.g. Department.

Using Special Characters in a Search
When performing a search (or query), special characters can be used to streamline the results

- The percent sign "%" is a wild card that when used in a search is a space holder for any letter or word. It means, 'any character here'. For example, '42%' would return field values that contain 42 at the beginning, in the middle, or at the end of the value
The underscore character '_' means 'any one character here'. More than one underscore may be used in an expression. For example, 4_20 would return field values that were 4 characters in length, begin with a 4, then any character and end with 20. 4__0 (4, two underscores, 0) would return field values that are 4 characters in length and begin with a 4, then contain any two characters, and end with 0.

Printing

From a Web Browser
Sometimes you may need to modify your web browser page setup margins to be able to print wide pages properly or to switch the print orientation to landscape.

a. Go to your web browser’s Tools menu and click on Print>Page Setup.

b. The Page Setup page appears.
c. Adjust settings accordingly, and then click the “OK” button. Ensure that the orientation is set to Landscape.

Using Manager Self Service

This is the Using Manager Self Service lesson of the Manager Self Service course. Upon completion of this lesson, you will be able to:

- View and update Job and Personal Information

**Estimated Time to Complete Lesson:** 10 minutes

Job and Personal Information

**Viewing and Updating Employee Personal and Job Information**
Information for employees in your administrative department(s) is located in the "Job and Personal Information" folder. Job and Personal Information is the first sub-folder in the Manager Self-Service folder.

The employee list is accessed by selecting the "View Employee Personal Info" link within the "Job and Personal Information" folder.
When the list generates, click the "Select Button" next to an employee's name to view the information page. You can also view the list as of a different date. Simply enter the date from which you would like to view the list in the "As of Date" field and then click on the "Refresh Employees" button. More about this on the next page.

**Note:**

- The personal information that you can update for employees can also be updated by the employee in the Employee Self-Service portion of PAC, except for Office Address. Employees cannot update their own office address.

The View Employee Personal Information Page

**Employee Personal Information**

From View Employee Personal Information, you can view an employee's personal and job summary information. Some items are editable and others are view only.

Employee information that can be edited is:
• addresses (home, office and mailing)
• telephone numbers

Employee information that is view only:

• emergency contacts
• check address
• email address
• job summary information
• interdisciplinary appointments
• birthday

When you access the page, the "As Of Date" defaults to today's date and the employee list displays as of that date.

To view information for active faculty and staff
press the "Select" button next to the employee name and their information page will display. Some employees have multiple positions. Be sure to select the line item with the employee and position you want to view.

To view information for non-active faculty and staff
Change the "As Of Date" to one day before the non-active status went into effect. For example, if Joan Smith went on a Leave of Absence on 10/15/YYYY, enter 10/14/YYYY and press the "Refresh Employees" button. The list now displays employees from that date.
Searching for an Employee

**Searching for an Employee**
The employee list that displays when the "View Employee Personal Info" link is clicked, returns the first 300 employees in your department(s). If you have access to a large department (or multiple departments) with more than 300 employees, not all of them will appear in the displayed list.

To find an employee not displayed on the list, click the "Find Employee" link and then enter search criteria in the search page and click "Select" in the results list to access the employee page.

Reference the *Performing Searches* lesson for more information on searching for PAC data.

**Note:** to view a complete employee listing, the HR Manager Report, "Employee Personal and Job Information", can be run from the HR Data Store.
View Employee Data

Let's practice viewing employee data from the Main Menu.

Procedure

This is the "View Employee Data" topic where you will learn how to view job and personal information for employees in your administrative department(s).

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Main Menu</strong> button.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Manager Self Service</strong> menu.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Job and Personal Information</strong> menu.</td>
</tr>
</tbody>
</table>
Training Guide  
Manager Self Service (MSS)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 4.   | Click the **View Employee Personal Info** menu.  
|      | ![View Employee Personal Info](image) |
| 5.   | The list of employees is returned. Click the **Select** button next to the employee information you want to view.  
|      | ![Select](image) |
| 6.   | The employee's information page appears. Click any link on the bottom of the page to view that information.  
|      | **Click the Individual Job Summary link.**  
|      | ![Individual Job Summary](image) |
Step 7. To return to the employee's page click the Employee Information link.

Employee Information

Step 8. To return to the employee listing page, click the Return to Select Employees link.

Return to Select Employees
### Step 9
To search for employees, click the **Find Employee** link.

**Find Employee**

### Step 10
Enter data into a search field to find an employee. Enter "smith" into the **Last Name** field.

### Step 11
Click the **Search** button.

**Search**

### Step 12
Click the **Select** button.

**Select**
Step | Action
---|---
13. | The employee page appears.
14. | You have successfully completed the, "View Employee Information" topic. You can now move onto the next topic, "View and Update Home and Mailing Addresses" where you will learn how to view and edit these addresses.

**End of Procedure.**

### View and Update Personal and Job Information Exercises

**View and Update Job and Personal Information**

Not all information accessed in Manager Self Service can be edited directly in PAC. Some of the pages are view only and some are used to gather information and some are editable. For updates to Job and Personal information that cannot be submitted electronically, a Personnel Action Form (PAF) printed from the employee’s record is submitted to HRPC requesting the change. More on this topic to follow. Access the Completing a PAF job aid in the Course Catalog ([http://hr.columbia.edu/course-catalog/search](http://hr.columbia.edu/course-catalog/search)) in the HR Website for a step by step guide on how to complete and submit a PAF.

Items that can be viewed and edited. These items can also be edited directly by an employee using Employee Self-Service in PAC, with the exception of *Office Address. Employees cannot update their own office address. Only MSS users (and Central HR) can update an employee's office address:

- Home Address
- Mailing Address
- *Office Address
- Phone Numbers

Items that can be viewed only:

- Email Address
- Emergency Contacts
- Check Address - Check Address ([http://hr.columbia.edu/helpful-tools/hr-manager-toolkit/managing-staff/managing-pay/pay-transactions/check-address](http://hr.columbia.edu/helpful-tools/hr-manager-toolkit/managing-staff/managing-pay/pay-transactions/check-address)) Form submitted to Payroll to process Check Address Changes
- Birthday
- Individual Job Summary
- Psyche History (for employees with employment history prior to July 1, 2002)
- Interdisciplinary Appointments
- Generate a PAF (Personnel Action Form) - submitted to HRPC to process job and personal data changes
To navigate to an item, click the appropriate link at the bottom of the Employee Information page. To return to the list of employees, click the "Return to Select Employees" link at the bottom of the page.

Following are instructions and exercises to practice viewing and updating an employee's job and personal information.

Employee Addresses: Home Mailing Office

**Employee Addresses: Home, Mailing and Office**

To view/update addresses, click the 'Home and Mailing Addresses' link at the bottom of the employee's personal information page.

An employee can have up to four (4) addresses added to their record. Once an address is added for each of the options: Home, Mailing, CU Office and Office #2, you can only edit those addresses. If an employee has four addresses in the system, the option to Add an address does not appear. If an employee has less than four addresses in the system, the ones for which no address exists, can be added.

**Address Definitions:**

- **Home** - indicates where the employee's W-2 statements will be mailed. If the employee's new Home Address reflects a move in/out of New York City or Yonkers, or a change in home state, the employee may need to complete new Tax Forms. The Departmental Administrator should be able to advise on this. For more information visit the Payroll Information (http://finance.columbia.edu/content/payroll-main) section of the Finance Gateway
• **Mailing** - enter a Mailing Address ONLY if the employee wants mail to be sent to a different address than his/her Home. Do not add a Mailing Address if it is the same as the employee's Home Address.

• **Office (CU Office)** - this is the employee's primary work location. Note that employees cannot change their office address.

• **Office (CU Office #2)** - enter a 2nd CU Office Address if the employee has a second work location. If the Office Mailing Address has a four-digit Mail Code, enter it in Address 3 field.

Note the helpful information regarding changes of address listed at the bottom of this page.

To edit an existing address:

- click the "pencil" icon in the Edit column next to the address to update
- enter the effective date for the change in the "Change As Of" field
- enter the updated address information
- press "Save" on the bottom of the page and then "OK" on the Save Confirmation page.

Note: The **Status** field indicates whether the address is current or will be made active at a future date, listed in the **As Of** field.
Let's practice viewing and updating an address in Manager Self Service.

**Procedure**

This is the "View and Update Home and Mailing Addresses" topic where you will learn how to view and update addresses.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Main Menu</strong> button.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Manager Self Service</strong> menu.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Job and Personal Information</strong> menu.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>View Employee Personal Info</strong> menu.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Select</strong> button.</td>
</tr>
</tbody>
</table>
Step 6. **Click the Home and Mailing Addresses link.**

Home and Mailing Addresses

---

Step 7. **The home and office addresses for the employee appear.**

For this example, let's edit the home address. **Click the Edit button for the Home Address.**
### Step 8
Click in the **Address 2** field.

### Step 9
Enter the new address information into any field. For this example, let's add and apartment number. Enter "Apt. 12A" in the **Address 2** field.

Note that there is a "Change As Of" date which allows you to enter a future dated change.

### Step 10
Click the **Save** button.

### Step 11
Click the **OK** button.

### Step 12
The updated address displays.

### Step 13
You have successfully completed the "View and Update Home and Mailing Addresses" topic. You can now move on to the "View Email Addresses" topic.

#### End of Procedure.

---

### View Email Address

**Email Address**

To view the employee's email address, click the 'Email Addresses' link at the bottom of the employee's personal information page. You will see the employee's official Columbia University email address, where all official communications from Columbia University will be sent.
If an employee would like to use an email address other than his/her official Columbia email account, a forwarding request must be completed. Please refer any employees wishing to forward their email to go to the UNI Mail Forwarding page in the CUIT Email Services (http://cuit.columbia.edu/cuit/email-services) website page. Once there, they login with their UNI and follow the online instructions.

Sample print below for representation only.

![Sample print for representation only.](image)

**View Email Addresses**

Let's practice viewing email addresses.

**Procedure**

This is the "View Email Addresses" topic where you will learn how to view email addresses.
Step | Action
--- | ---
1. | Click the **Email Addresses** link.  
**Email Addresses**
2. | You will see the employee's official Columbia University email address where all official communications from Columbia University will be sent.
3. | If an employee would like to use an email address other than his/her official Columbia email account, s/he will need to forward his/her official Columbia email account to the other account.

Please refer any employee wishing to forward their email to go to  
http://cuit.columbia.edu/cuit/email-services, login with their UNI and then click the **UNI Mail Forwarding** link and follow the online instructions.
### View and Update Phone Numbers

**Employee Phone Numbers**
To view/update phone numbers, click the 'Phone Numbers' link at the bottom of the employee's personal information page.

If a phone number exists in the system for the employee, it is displayed.

- To add a new telephone number, click the Add Phone Number button and enter the number and click "Save"
- To edit a phone number, make the change to the field and click "Save"
- To remove a phone number, delete the number in the field and click "Save"

The Preferred box indicates the employee's preferred method of telephone contact. The default is "Home" but this can be changed.

**Text Message Notifications – Campus Alerts:** Mobile phone numbers are registered with the University Campus Alerts system. All employees with a university-issued phone are automatically enrolled. All mobile numbers that are entered in PAC for an employee are also registered to ensure the employee receives campus alerts from Public Safety via text message.

- Text message notification will be used in instances such as weather emergencies, major transit interruptions, campus closures, and ongoing emergency situations
- Not to be used in routine situations
- Numbers are securely uploaded daily into the system
- Select members of the CU Public Safety staff have the ability to log in to the system and easily send a message to employees

Access the next topic to view a simulation for phone number entry and to view the available phone types.
View/Update Phone Numbers

Let's practice by viewing and updating telephone numbers.

Procedure

This is the "View/Update Phone Numbers" topic where you will learn how to view and update telephone numbers.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Phone Numbers</strong> link.</td>
</tr>
<tr>
<td></td>
<td><strong>Phone Numbers</strong></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>2.</td>
<td>If a phone number exists in the system for the employee, it is displayed.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>To add a new telephone number, click on the <strong>Add Phone Number</strong> button.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Phone Type</strong> list.</td>
</tr>
</tbody>
</table>
5. There are twelve (12) phone types:

1. **CU Office** - Use this for the primary Columbia Office phone.
2. **CU Office Fax** - Use this for the primary Columbia Office fax.
3. **CU-Issued Mobile** - Employee's Columbia University issued mobile phone number.
4. **Home** - Employee's primary residential phone number.
5. **Main** - Employee's main phone number.
6. **Mobile** - Employee's mobile phone number.
7. **Office #2** - Employee's second work location phone type.
8. **Office Fax #2** - Employee's second work location fax type.
9. **Pager 1** - Employee's pager number.
10. **Vendor Main Fax** - Do Not Use this Option.
11. **Vendor Main Phone** - Do Not Use this Option.
12. **Work** - Do Not Use this Option.
### Step 6
Click the **CU-Issued Mobile** list item.

CU-Issued Mobile

---

### Step 7
Click in the **Telephone** field.

---

### Step 8
Enter all phone type numbers using this format: 111/222-3333.

Enter the desired information into the **Telephone** field. Enter "**212/555-1234**".

---

### Step 9
Check the **Preferred** box next to the number that you prefer to be contacted.

The default for a preferred number is your Home phone number, but this can be changed.

---

### Step 10
When you are finished entering the information for your phone number, click the **Save** button.
Step 11. Click the **OK** button.

Step 12. Click the **Return to Employee Information** link.

Step 13. You have successfully completed the "View/Update Phone Numbers" topic. You can now move on to the "View Emergency Contacts".

End of Procedure.

---

**View Emergency Contacts**

**Emergency Contacts**

To view an employee's emergency contact(s), click the 'Emergency Contacts' link at the bottom of the employee's personal information page.

**NOTE:** MSS users cannot update an employee's emergency contacts. Employees update this information using Employee Self Service. For reference and guidance to employees, below are the steps on how this is done.

To add an emergency contact via Employee Self Service:
1. Press the 'Add Emergency Contact' button
2. Enter the Contact Name
3. Select the 'Relationship to Employee' from the available options in the drop down menu
4. Enter the Contact's address. If the contact has the same address as the employee, check the "Contact has the same address as the employee" check box. Another field appears where you can select from a drop down menu which one of the employee's addresses to choose. If the address is not the same, do not check this box and in the Address section, press the 'Edit Address' button to open the entry fields and enter the address and then press "OK"
5. Enter the Contact's phone number. If the contact has the same phone number as the employee, check the "Contact has the same telephone number as the employee" check box. Another field appears where you can select from a drop down menu which one of the employee's phone numbers to choose. If the phone number is not the same, do not check this box and in the Phone section enter the phone number
6. Additional phone numbers can be added as needed by pressing the "Add Phone Number" button and then entering the data select the Phone Type and enter the phone number
7. Press "Save" on the bottom of the page
8. Press "OK" on the Save Confirmation page

Note: If more than one Emergency Contact is added, a Primary Contact is selected. You may change who is noted as the Primary Contact simply by checking the box next to the contact who is to be primary.

To edit an existing contact:

1. Click the pencil icon in the "Edit" field next for the Contact
2. Enter the updated contact information. See above for entry options
3. Press "Save" on the bottom of the page
4. Press "OK" on the Save Confirmation page

View Emergency Contacts

Let's practice viewing Emergency Contacts.

Procedure

This is the "View Emergency Contacts" topic where you will learn how to view Emergency Contacts.
Training Guide
Manager Self Service (MSS)

Step | Action
--- | ---
1. | Click the **Emergency Contacts** link.
   
   **Emergency Contacts**

2. | The employee's Emergency Contacts are displayed. Note that you cannot edit the information - it is view only.

3. | You have successfully completed the "View Emergency Contacts" topic. You can now move on to the "View Individual Job Summary".

**End of Procedure.**

**View Job Information - from Employee Information Page**

**View Job Information - from Within the Employee Information Page**

The Individual Job Information Page displays a summary overview of history on a specific position. On this page, you will see changes to position data, including action reasons, effective and status dates, department and job codes, and budgeting information.

As this is a view only page, to make a change to job data, submit a Personnel Action Form (PAF) along with the required documentation and signatures to the Human Resources Processing Center (HRPC). Once it is processed, the changes will be reflected in the employee's record and you can also view the processing dates in the Personal Action Report - upcoming lesson.

For more information on submitting employee data changes using a PAF, access the 'Managing Staff' section within the "HR Manager Toolkit" in the HR Website ([http://hr.columbia.edu/](http://hr.columbia.edu/)).

When accessing the Job Information page through the employee's personal information page, click the 'Individual Job Summary' link at the bottom of the
Navigating through this path allows you to navigate back to the employee's information page after viewing the job information.

Access the following topic to view a simulation of accessing job information from within an employee's personal information page. Field descriptions are provided within the simulation.

**Remember:** As with all information contained within this application, please be mindful not to expose data when viewing this sensitive, confidential employee information and remember to close out of the application when finished.

**View Individual Job Summary**

This page displays a summary overview of history on a specific position. On this page, you will see changes to position data, including action reasons, effective and status dates, department and job codes, and budgeting information.

Let's practice by viewing the Individual Job Summary.

**Procedure**

This is the "View Individual Job Summary" topic where you will learn how to view an individual job summary.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Individual Job Summary</strong> link.</td>
</tr>
<tr>
<td></td>
<td><strong>Individual Job Summary</strong></td>
</tr>
</tbody>
</table>
Training Guide
Manager Self Service (MSS)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>The CU Job Summary page displays a summary overview of history on a specific employee record. On this page, you will see changes to position data, including action reasons, effective and status dates, department and job codes, and budgeting information.</td>
</tr>
</tbody>
</table>
| 3.   | The General tab displays the following fields:  
   1. **Eff Date**: Date the record appears as active, or effective, in the application.  
   2. **Sequence**: This field tracks the sequence that action occur, if entered on the same day.  
   3. **Action**: The action that occurred.  
   4. **Action Reason***: The reason for the action.  
   *Note: To view the most recent list of Action and Reason Codes, please access the Action and Reason Codes Job Aid in the Course Catalog (http://hr.columbia.edu/course-catalog/search) on the HR Website. |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Click the Job Information tab.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>5.</td>
<td>The <strong>Job Information</strong> tab displays the following fields:</td>
</tr>
<tr>
<td></td>
<td>1. <strong>Effective Date</strong>: Date the record appears as active, or effective, in the application.</td>
</tr>
<tr>
<td></td>
<td>2. <strong>Sequence</strong>: This field tracks the sequence that actions that occur, if entered on the same day.</td>
</tr>
<tr>
<td></td>
<td>3. <strong>Jobcode</strong>: View job code information for this employee after each personnel action.</td>
</tr>
<tr>
<td></td>
<td>4. <strong>Empl Type (Employee Type)</strong>: Displays the employee type (e.g., salaried, hourly) after each personnel action.</td>
</tr>
<tr>
<td></td>
<td>5. <strong>Empl Status (Employee Status)</strong>: Displays the employee status after each personnel action.</td>
</tr>
<tr>
<td></td>
<td>6. <strong>Full/Part Time</strong>: Indicates whether the employee is full or part time after each personnel action.</td>
</tr>
<tr>
<td></td>
<td>7. <strong>Reg/Temp</strong>: Indicates whether the employee is regular or temporary after each personnel action.</td>
</tr>
<tr>
<td></td>
<td>8. <strong>Standard Hours</strong>: Displays the standard hours after each personnel action.</td>
</tr>
<tr>
<td></td>
<td>9. <strong>Work Period</strong>: Displays the work period after each personnel action.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Work Location</strong> tab.</td>
</tr>
</tbody>
</table>
### Step 7

The **Work Location** tab displays the following fields:

1. **Effective Date**: Date the record appears as active, or effective, in the application.
2. **Sequence**: This field tracks the sequence that actions that occur, if entered on the same day.
3. **Position**: The short description of the position to which the employee is assigned.
4. **Company**: The employee will be in CU1 or CU2 unless s/he is a retiree than s/he will be in REIT.
5. **DeptID**: The department that is associated with the position.
6. **Sal Plan (Salary Administrative Plan)**: This field groups employees who have similar compensation packages.
7. **Grade**: Grade of positions.
8. **Pay Group**: Grouping of employee populations for payroll purposes.
9. **Frequency**: The compensation frequency for the employee.

### Step 8

Click the **Compensation** tab.

<table>
<thead>
<tr>
<th>Compensation</th>
</tr>
</thead>
</table>

### Step 9

The **Compensation** tab displays the following fields:

1. **Eff Date**: Date the record appears as active, or effective, in the application. Defaults to today's date.
2. **Sequence**: This field tracks the sequence that actions that occur, if entered on the same day.
3. **Annual Rt**: The employee's annual compensation rate.
4. **Monthly Rt**: The employee's monthly compensation rate.
5. **Daily Rt**: The employee's daily compensation rate.
6. **Hrly Rate**: The employee's hourly compensation rate.
7. **Currency**: The currency that the compensation is displayed in.
8. **Change Percent**: The overall change amount for this pay component.
9. **Components (link)**: This field gives information about the pay.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>Employee Information</strong> link.</td>
</tr>
<tr>
<td></td>
<td>Employee Information</td>
</tr>
<tr>
<td>11.</td>
<td>You have successfully completed the &quot;View Individual Job Summary&quot; topic. You can now move on to the &quot;View Job Information from the Main Menu&quot; lesson.</td>
</tr>
<tr>
<td></td>
<td><strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>

**View Job Information - from Main Menu**

**View Job Information - from the Main Menu**
You can also directly access an employee's job information without first accessing the employee information page from the View Personal Information page. This is helpful if you are searching for a particular piece of information, such as Pay Group, and want to quickly navigate to the job page.

To access an employee's job information from the main menu:

1. Navigate to the 'Individual Job Summary' link from the Main Menu. The path is Main Menu > Manager Self Service > Job and Personal Information > Individual Job Summary
2. Enter the Employee ID or Name values into any of the search fields provided. For tips on searching for data in PAC, reference the *Performing Searches in PAC* lesson
3. Click Search
4. Select the Employee from the Results List
5. The Job Summary Information appears

On the bottom of the Job Summary page, you will see the "Go To: Employee Information" link. Clicking this link will bring you back to the Employee Listing page and not the individual's record.
Generate a Populated PAF

**Generate a Populated PAF (Personnel Action Forms)**
Once an employee is hired and their record is in the PAC system, personal and job changes that cannot be made electronically are submitted using a Personnel Action Form (PAF).

Personnel Action Forms or PAFs are generated and used to request a change to an employee's record. These types of changes could be putting someone on leave of absence, or transferring an employee to another department, or changing an employee's compensation, etc. Completed PAFs are submitted to HRPC for processing.

Below is an overview of the PAF submittal process. For detailed information, access the Completing a PAF job aid in the Course Catalog ([http://hr.columbia.edu/course-catalog/search](http://hr.columbia.edu/course-catalog/search)) on the HR Website for a step by step guide on how to complete and submit a PAF. Also located in the Course Catalog is a job aid listing the Actions and Reason Codes used on the form.

1. Generate an Active PAF for the employee from the View Employee Personal Information page in the Manager Self-Service section of the People @ Columbia system.
2. Enter the Action / Reason code(s) and effective date(s) at the top of the PAF. This indicates the type of change(s) requested. Action / Reason codes vary dependent upon the type of transaction. Reference the Action / Reason code job aid in the Course Catalog of the HR Website for a full listing of codes and the individual transaction pages in the HR website for a description of transactions as well as supporting information on submitting those changes.
3. In the appropriate sections of the PAF, draw/type a single line through information that needs to be changed and print/type the new information in the updated fields.

4. Attach the required supporting paperwork for the transaction. The documentation required differs depending upon the transaction. Visit the individual transaction pages on the HR website for a description of supporting documentation. You can also contact your HR representative or HR Client Manager for additional guidance.

5. Enter any comments in the space provided.

6. Verify that the form is complete, sign it, attach the appropriate documentation and route it to the appropriate office for approval. Signing the form indicates approval for the transaction. Selected individuals in your department have the authority to sign PAFs. Ensure that the form is signed by those with the authority to do so.

Generate a Populated PAF (Personnel Action Form) for an Employee

Let’s practice generating a populated PAF for an employee.

Procedure

This is the "Generate a Populated PAF (Personnel Action Form) for an Employee" topic where you will learn how to generate a populated PAF for an employee.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From within the employee's information page, click the <strong>Generate PAF for Employee</strong> link.</td>
</tr>
</tbody>
</table>

Generate PAF for Employee
Step | Action
--- | ---
2. | The Populated Employee PAF appears in a new web browser window.  
**Note**: When you print the form, your printer may automatically print it in landscape format. *If not, you may need to change your print settings to Landscape.* (This is done through the "File" menu bar choice, and the "Page Setup" option.)
3. | You have successfully completed the "Generate a Populated PAF (Personnel Action Form) for an Employee". You can now move on to the "View Check Address" lesson.  
**End of Procedure**.

**View Check Address**

**Check Address**  
To view the employee's check address, click the 'Check Address' link at the bottom of the employee's personal information page. You will see the employee's check address, which is the delivery location for an employee's paycheck; usually the location of the Departmental Administrator. The check sequence code indicates the employee's department and location where their paper check would be delivered. Reference the Check Address ([http://hr.columbia.edu/helpful-tools/hr-manager-toolkit/managing-staff/managing-pay/pay-transactions/check-address](http://hr.columbia.edu/helpful-tools/hr-manager-toolkit/managing-staff/managing-pay/pay-transactions/check-address)) section of the HR Website for detailed information on check addresses and Check Sequence Codes, including how to make changes.

Sample print below for representation only.
View Check Address

Let's practice viewing a check address.

Procedure

This is the "View Check Address" topic where you will learn how to view a check address.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Check Address</strong> link.</td>
</tr>
<tr>
<td></td>
<td><strong>Check Address</strong></td>
</tr>
<tr>
<td>2.</td>
<td><strong>Check Address</strong> is where the employee's check or deposit advice will be sent.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
3. | To return to the main information page for the employee, click the **Return to Employee Information** link.

   *Return to Employee Information*

4. | You have successfully completed the "View Check Address" topic. You can now move on to the "Interdisciplinary Appointments" lesson.

   **End of Procedure.**

### View Interdisciplinary Appointments

**View Interdisciplinary Appointments**

To view the employee's Interdisciplinary Appointment, if one exists, click the 'Interdisciplinary Appointment' link at the bottom of the employee's personal information page to view the employee's Interdisciplinary affiliated departments. If there are several, you may need to scroll through the rows by using the ← → scroll keys on the right side of the header bar.

If an Interdisciplinary Appointment was entered in the system, it will appear here.

**Field Descriptions:**

- **As of Date** - Date the record appears as active, or effective, in the application
- **Eff Status** - Denotes whether or not the affiliation is active
- **Department** - The department where the interdisciplinary affiliation is located

View Interdisciplinary Appointments

Let's practice by viewing Interdisciplinary Appointments.

**Procedure**

This is the "View Interdisciplinary Appointments" topic where you will learn how to view Interdisciplinary Appointments.
1. To view the employee's Interdisciplinary affiliated departments, click the **Interdisciplinary Appointments** link.

   **Interdisciplinary Appointments**

2. This page is **View-Only**. If an Interdisciplinary Appointment was entered in the system, it will appear here.

   If there are several, you may need to scroll through the rows by using the right or left arrows on the right side of the header.

3. Click the **Employee Information** link.

   **Employee information**
### Step 4

You have successfully completed the "View Interdisciplinary Appointments" topic. You can now move on to "View Birthday" topic. **End of Procedure.**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>You have successfully completed the &quot;View Interdisciplinary Appointments&quot; topic. You can now move on to &quot;View Birthday&quot; topic. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>

**View Birthday**

**View Birthday**

To view the employee's birthday, click the 'Birthday' link at the bottom of the employee's personal information page.

**Procedure**

This is the "View Birthday" topic where you will learn how to view a birthday.
**Step** | **Action**
---|---
1. | To view the Faculty or Staff member's birthday, click on the **Birthday** link. **Birthday**
2. | The birthday displays the month and day.
3. | To return to the main information page for the employee, click on the **Return to Employee Information** link. **Return to Employee Information**
4. | You have successfully completed the "View Birthday" topic. You can now move on to the "View Psyche History" lesson. **End of Procedure.**

View Psyche History

**View Psyche History**
This link will only appear if the employee has employment history previous to July 1, 2002. The employee's history information will be held in the Psyche database. Psyche contains data from the legacy system prior to the roll out of PAC.

Click the 'View Psyche History' link to view the employee's history rows.

The field descriptions within the Psyche record are:

- **History Rec Num**: Each time a transaction is posted to Psyche the record number is incremented
- **Effective Date**: Date of the transaction
- **Action Code/Desc**: Transaction description
- **Control Number**: Sequential number assigned to each position held by employee, including terminated positions
- **Position Type**: Values: 1-Trustees, 2-Presidential Appt., 3 – Secretary’s Appt., 4-Support Staff Non-Union, 5-Support Staff Union
- **Full Time/Part Time**: 1- Full time, 2- Part Time
- **Salary**: Employee salary
- **Salary Type**: Values: 1-Continuous, 2-Limited (Annual Salary), 3-Period (Salary for a limited period of time)
- **Run Date**: Date the transaction was entered into the system

### Terminate Employee

**Terminate Employee - for Administrative Employees Only**

The Terminate Employee page is an electronic termination (eTermination) within Manager Self-Service that allows managers to electronically submit a termination for administrative employees.

Below is a quick step by step guide on how to process an electronic termination in MSS. For detailed information, visit the How to Terminate an Employee page in the HR Manager Toolkit in the HR Website.
1. Navigate to the Terminate Employee Page in PAC (Main Menu > Manager Self Service > Job and Personal Information > Terminate Employee)
2. Select the employee record to be terminated
3. Enter the termination date. The date that appears defaults to today's date. Be sure to change this to the correct termination date. The termination date is the date the employee is no longer with the University
4. Select the reason for the termination from the drop-down menu
5. Enter the number of vacation and personal days the employee is due: For officers, enter whole and half days. For support staff, enter whole days and hours
6. Enter any needed comments in the comments box
7. Click the “submit” button
8. A confirmation page appears to verify the transaction has been processed
9. Check the data on summary page and print (if desired or required)

Once the termination is submitted, the transaction moves to the HRPC to complete the process. The HRPC typically processes terminations before each payroll run. You will be able to tell the employee is terminated in three ways:

1. Via the Personnel Action Report which details when the HRPC completed the action (more on this to follow)
2. The person no longer appears on the employee list when you navigate to the View Personal Info Page
3. Via the Termination Report generated from the suite of HR Manager Reports (more on this to follow)
Terminate Employee

Let's practice how to submit an eTermination for an administrative employee.

Procedure

This is the "Terminate Employee" topic where you will learn how to submit an eTermination for an administrative employee.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Main Menu</strong> button.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Manager Self Service</strong> menu.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Job and Personal Information</strong> menu.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Terminate Employee</strong> menu.</td>
</tr>
</tbody>
</table>
5. Select the terminated employee from the list. For this example, click the Select button next to Donald Downey.

6. The Terminate Employee page displays the following fields:

1. Empl ID: This field defaults to the Employee ID and cannot be updated.

2. Job Title: This field displays the Job Title of the employee and cannot be updated.

3. Termination Date: This field defaults to today's date. Enter or select from the calendar icon the correct date of termination.

   Remember, this is the first day the employee is no longer with the University.

4. Reason for Termination: Select the appropriate reason for the termination from the drop-down menu.

5. Vacation/Personal Days Due: Enter vacation and personal days in this field. For officers, enter whole and half days. For support staff, enter whole days and hours.

6. Comments: An optional field to add any comments.

7. Click the Reason for Termination dropdown button to activate the menu.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>For this example, select the <strong>Resignation - Education</strong> list item. Resignation-Education</td>
</tr>
<tr>
<td>9.</td>
<td>Click in the <strong>Vacation/Personal Days Due</strong> field.</td>
</tr>
<tr>
<td>10.</td>
<td>Enter the number of <strong>Vacation/Personal Days Due</strong> to the employee. For this example, enter &quot;10&quot;.</td>
</tr>
<tr>
<td>11.</td>
<td>Click in the <strong>Comments</strong> field and enter any needed comments. For this example &quot;Employee Returned to School to gain a Master's Degree&quot;.</td>
</tr>
</tbody>
</table>
### Step 12
Click the **Submit** button.

### Step 13
Click the **OK** button.

### Step 14
Click the **Return to Select Employees** link.

### Step 15
You have successfully completed the "Terminate Employee" topic and can now move on to the "Human Resources Manager Self Service Reports" lesson. **End of Procedure.**

---

**Human Resources Manager Reports**

This is the *Manager Reports* lesson of the *Manager Self Service* course. Upon completion of this lesson, you will be able to:

- View Manager Self Service Reports and Payroll Queries
- Describe the Report Components of the HR Data Store
- Access, view, print and save HR Manager Reports
- Describe "Pushed" Reports and Emails

**Reporting at Columbia University**

**Reporting at Columbia University**

There are several suites of reports containing specific types of data such as Financial, Human Resources, Student and Historical.

There are also different locations where reports are accessed as well as the point in time the data is accessed.

2. 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 contains the HR Manager Reports. The data in the HR Data Store is "day old data". That is, running a report today displays information as of yesterday. Information on accessing this site to follow.

3. The PAC production environment provides both real time and day old access to some reports and queries. The production environment is accessed once you log in to PAC.

*For more information on Finance reporting, visit the Reporting Basics ([http://finance.columbia.edu/content/reporting-columbia](http://finance.columbia.edu/content/reporting-columbia)) page on the Finance Gateway.

Access to Human Resources reports is provided to the following PAC roles:

- Manager Self-Service
- Management Reporter
- Labor Accounting Approver (Additional Compensation/Template-Based Hire/Accounting)

The three sets of HR reports and where they are located is listed below.

1. Manager Self Service reports and payroll queries provide real-time access to reports of PAC transactions and employee and department earnings and payroll data and are located in the PAC production environment.
2. HR Manager Reports provide day old employee and department data and are accessible through the HR Data store.
3. Labor Accounting Reports provide payroll, suspense, fringe rate and funding set up data and are located in the PAC production environment. Not all reports display real-time data. The Funding Setup Report displays real-time data. The Fringe Rate Report by Employee, Payroll Actuals Report and Suspense Detail Report display day old data. See the Labor Accounting Reporting Job Aid in the Course Catalog ([http://hr.columbia.edu/course-catalog/search](http://hr.columbia.edu/course-catalog/search)) on the HR Website for information on accessing and generating Labor Accounting reports.

Let's explore Human Resources Manager Reports.

**Manager Self Service Reports and Queries**

Manager Self Service Reports and Queries are located in the Manager Reports folder within Manager Self Service.
The Reports and Queries accessed from here are listed below.

- Personnel Action Report
- Department Earnings Register
- Employee Earnings History
- Department Payroll Register
- Employee Payroll History

**Generate a Personnel Action Report**

*Generate a 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 every month only the preceding month's data is available.
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 description 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 in the Course Catalog (http://hr.columbia.edu/course-catalog/search) 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.

See sample report displayed below.

### Generate a Personnel Action Report

A **Personnel Action Report** will list every employee in your department that has had a transaction action date in the current month.

**Note:** In the first week of every month, only the preceding month's data is available.

**Procedure**

This is the "Generate a Personnel Action Report" topic where you will learn how to generate a Personnel Action Report.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Main Menu</strong> button.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Main Menu" /></td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Manager Self Service</strong> menu.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Manager Self Service" /></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Manager Reports</strong> menu.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Manager Reports" /></td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Manager SS Reports</strong> menu.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Manager SS Reports" /></td>
</tr>
</tbody>
</table>

5. Click the **Generate a Personnel Action Report** button.  
**Generate a Personnel Action Report**

**Note:** Refer to the "Action and Reason Codes" for more information on each individual action and reason code.

7. You have successfully completed the "Generate a Personnel Action Report" topic and you can now move on to the "MSS Payroll Queries" lesson.  
**End of Procedure.**

MSS Payroll Queries

**Generate a Manager Self Service Payroll Query**
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.

The Payroll Queries and descriptions are listed below.
• **Department Earnings Register** - The Department Earnings Register lists regular, overtime, and other earnings for employees in your department for ONE designated pay period

• **Employee Earnings History** - The Employee Earnings History lists regular, overtime and other earnings for ONE employee in your department over SEVERAL pay periods

• **Department Payroll Register** - The Department Payroll Register lists total gross, total taxes, total deductions, and net pay for employees in your department, for ONE designated pay period

• **Employee Payroll History** - The Employee Payroll History lists total gross, total taxes, total deductions, and net pay for ONE employee in your department, over SEVERAL pay periods

The Department and Employee Earnings History Reports provide the earnings code for a particular payroll. This is 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 REG earn code and indicates the earnings were the employee's regular earnings.

Remember: You can use the 'wildcard', where allowable, to return a greater result. Enter a % instead of a specific value.

See the following topics for a simulation on how to generate MSS Payroll Queries.

**View Department Earnings Register**

Let's practice viewing the *Department Earnings Register*.

**Procedure**

This is the "View Department Earnings Register" topic where you will learn how to view the "Department Earnings Register" payroll query.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Main Menu</strong> button.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Main Menu" /></td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Manager Self Service</strong> menu.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Manager Self Service" /></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Manager Reports</strong> menu.</td>
</tr>
<tr>
<td></td>
<td>![Manager Reports menu]</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Manager SS Reports</strong> menu.</td>
</tr>
<tr>
<td></td>
<td>![Manager SS Reports menu]</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Department Earnings Register</strong> link.</td>
</tr>
<tr>
<td></td>
<td>Department Earnings Register</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>6.</td>
<td><strong>The Message</strong> displays instructing you <strong>NOT</strong> to leave any fields blank on the following screen and also instructs you to use a wildcard or &quot;%&quot; sign to search all items in that field. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
| 7.   | **The Departmental Earnings Register** displays and lists regular, overtime and other earnings for employees in your department for **ONE** designated pay period. Enter the search criteria for:  
1. **Pay Period End**: Select the date for the earnings you want to view.  
2. **Pay Frequency**: Select the appropriate frequency for the Faculty and Staff population. **Do NOT** leave this field blank.  
3. **DepartID**: Enter the specific department ID or type "\%" for all departments. **Do NOT** leave this field blank.  
4. **Empl ID**: Enter the specific employee ID or type "\%" to search all employees. **Do NOT** leave this field blank.  
5. **Name**: Enter the specific employee's name or type "\%" to search all employees. **Do NOT** leave this field blank. |
### Step | Action
--- | ---
8. | Enter the pay period end date for the paycheck data to view. For this example, enter "04/15/2014" into the **Pay Period End** field.
9. | Click the look up glass to select a paycheck frequency from the list or enter directly into the field.  
Frequency options are:  
- % = all paychecks  
- B = bi-weekly payroll  
- M = monthly payroll  
- S = semi-monthly payroll  
- W = weekly payroll  
For this example enter "%" into the **Frequency** field.
10. | You can fine tune the results by entering a specific department number in the **DeptID** field. To see all department(s) data, enter "%" into the **DeptID** field.
11. | You can fine tune the results by entering a specific employee ID number into the **Empl ID** field. To see all employee data in the department(s) selected, enter "%" into the **Empl ID** field.
12. | You can fine tune the results by entering a specific employee name into the **Name** field. To see all employee data in the department(s) selected, enter "%" into the **Name** field.
13. | Click the **View Results** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>The <strong>Departmental Earnings Register</strong>'s fields are:</td>
</tr>
<tr>
<td></td>
<td>1. <strong>Dept ID</strong>: This is the employee's admin department.</td>
</tr>
<tr>
<td></td>
<td>2. <strong>UNI</strong>: The employee's UNI.</td>
</tr>
<tr>
<td></td>
<td>3. <strong>Name</strong>: Employee's name.</td>
</tr>
<tr>
<td></td>
<td>4. <strong>ID (Employee ID)</strong>: The unique PAC ID for the employee.</td>
</tr>
<tr>
<td></td>
<td>5. <strong>Co (Company)</strong>: The employee will be in CU1 unless s/he is a retiree then s/he will be in REIT.</td>
</tr>
<tr>
<td></td>
<td>6. <strong>Pay Group</strong>: Grouping of employee populations for payroll purposes.</td>
</tr>
<tr>
<td></td>
<td>7. <strong>Frequency</strong>: The compensation frequency for the employee.</td>
</tr>
<tr>
<td></td>
<td>8. <strong>Pay Period End</strong>: The end of the earnings period.</td>
</tr>
<tr>
<td></td>
<td>9. <strong>Check Dt</strong>: The Check Date for the designated pay period.</td>
</tr>
<tr>
<td>15.</td>
<td>(Continued):</td>
</tr>
<tr>
<td></td>
<td>10. <strong>Off Cycle</strong>: Y = Yes; N = No.</td>
</tr>
<tr>
<td></td>
<td>11. <strong>Earn Code</strong>: Earnings Code. The &quot;- - -&quot; earnings code is the same as the REG earnings code and indicates the earnings were the employee's regular earnings.</td>
</tr>
<tr>
<td></td>
<td>12. <strong>Description</strong>: Description of Earnings Code.</td>
</tr>
<tr>
<td></td>
<td>13. <strong>Reg Hours</strong>: Regular Hours for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>14. <strong>Reg Earns</strong>: Regular Earnings for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>15. <strong>OT Hours</strong>: Overtime Hours for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>16. <strong>OT Earns</strong>: Overtime Earnings for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>17. <strong>Oth Hours</strong>: Other Hours for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>18. <strong>Oth Earns</strong>: Other Earnings for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>19. <strong>Addl #</strong>: Displays when employee receives additional compensation.</td>
</tr>
<tr>
<td>16.</td>
<td>You have successfully completed the &quot;View Department Earnings Register&quot; topic and can now move on to the &quot;Employee Earnings History&quot; topic.</td>
</tr>
<tr>
<td></td>
<td><strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>

View Employee Earnings History
Let's practice by viewing the Employee Earnings History.

Procedure

This is the "View Employee Earnings History" topic where you will learn how to view the Employee Earnings History payroll query.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Employee Earnings History</strong> link.</td>
</tr>
<tr>
<td></td>
<td>Employee Earnings History</td>
</tr>
<tr>
<td>2.</td>
<td>The <strong>Message</strong> displays instructing you NOT to leave any fields blank on the following screen and also instructs you to use a wildcard or &quot;%&quot; sign to search all items in that field.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>3.</td>
<td>The <strong>Employee Earnings History</strong> lists regular, overtime and other earnings for ONE employee in your department over SEVERAL pay periods.</td>
</tr>
<tr>
<td></td>
<td>Enter the search criteria for:</td>
</tr>
<tr>
<td></td>
<td>1. <strong>EmplID</strong>: Enter the Employee ID for the employee you want to view.</td>
</tr>
<tr>
<td></td>
<td>2. <strong>Year</strong>: Enter the year you wish to view or type &quot;%&quot; for all years in the PAC database. Do NOT leave this field blank.</td>
</tr>
</tbody>
</table>
### Step 4
This query is generated using the employee's Empl ID (employee ID). If unknown, first obtain the Empl ID from the View Employee Personal Information page. For this example enter "10183866" into the Empl ID field.

### Step 5
Enter the year for the payrolls to view. For this example, enter "2014" into the Year field.

### Step 6
Click the View Results button.

### Step 7
The Employee Earnings History fields are:

1. **Dept ID**: This is the employee's admin department.
2. **UNI**: The employee's UNI.
3. **Name**: Employee's name.
4. **ID (Employee ID)**: The unique PAC ID for the employee.
5. **Co (Company)**: The employee will be in CU1 unless s/he is a retiree than s/he will be in REIT.
6. **Pay Group**: Grouping of employee populations for payroll purposes.
7. **Frequency**: The compensation frequency for the employee.
8. **Pay Period End**: The end of the earnings period.
9. **Check Dt**: The Check Date for the designated pay period.
### Step 8

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Continued):</td>
</tr>
</tbody>
</table>

10. **Year**: The earning's year (calendar).

11. **Off Cycle**: Y = Yes; N = No.

12. **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.

13. **Description**: Description of Earnings Code.

14. **Reg Hours**: Regular Hours for the designated pay period.

15. **Reg Earns**: Regular Earnings for the designated pay period.

16. **OT Hours**: Overtime Hours for the designated pay period.

17. **OT Earns**: Overtime Earnings for the designated pay period.

18. **Oth Hours**: Other Hours for the designated pay period.

19. **Oth Earns**: Other Earnings for the designated pay period.

### Step 9

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have successfully completed the &quot;View Employee Earnings History&quot; topic and can now move on to the &quot;Department Payroll History&quot; topic.</td>
</tr>
</tbody>
</table>

**End of Procedure.**

---

### View Department Payroll Register

Let's practice by viewing the Department Payroll Register.

**Procedure**

This is the "View Department Payroll Register" topic where you will learn how to view the Department Payroll Register.
Step | Action
--- | ---
1. | Click the **Department Payroll Register** link.

**Department Payroll Register**

2. | The **Message** displays instructing you NOT to leave any fields blank on the following screen and also instructs you to use a wildcard or "%" sign to search all items in that field.

Click the **OK** button.

3. | The **Department Payroll Register** lists total gross, total taxes, total deductions, and net pay for employees in your department, for ONE designated pay period.

Enter the search criteria for:

1. **Pay Period End Date**: Select the date for the earnings you want to view.

2. **Pay Frequency**: Select the appropriate frequency for the Faculty and Staff population. Do NOT leave this field blank.

3. **Dept ID**: Enter the specific department ID, or type "%" for all departments. Do NOT leave this field blank.

4. **Empl ID**: Enter the specific employee ID or type "%" to search all employees. Do NOT leave this field blank.

5. **Name**: Enter the specific employee's name, or type "%" to search all employees. Do NOT leave this field blank.
### Step 4. Action

Enter the pay period end date for the paycheck data to view. For this example, enter "04/15/2014" into the **Pay Period End** field.

### Step 5. Action

Click the look up glass to select a paycheck frequency from the list or enter directly into the field.

- Frequency options are:
  - % = all paychecks
  - B = bi-weekly payroll
  - M = monthly payroll
  - S = semi-monthly payroll
  - W = weekly payroll

For this example enter "%" into the **Frequency** field.

### Step 6. Action

You can fine tune the results by entering a specific department number in the **DeptID** field. To see all department(s) data, enter "%" into the **DeptID** field.

### Step 7. Action

You can fine tune the results by entering a specific employee ID number into the **Empl ID** field. To see all employee data in the department(s) selected, enter "%" into the **Empl ID** field.

### Step 8. Action

You can fine tune the results by entering a specific employee name into the **Name** field. To see all employee data in the department(s) selected, enter "%" into the **Name** field.

### Step 9. Action

Click the **View Results** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>The <strong>Departmental Payroll Register</strong> fields are:</td>
</tr>
<tr>
<td></td>
<td>1. <strong>Dept ID</strong>: This is the employee's admin department.</td>
</tr>
<tr>
<td></td>
<td>2. <strong>UNI</strong>: The employee's UNI.</td>
</tr>
<tr>
<td></td>
<td>3. <strong>Name</strong>: Employee's name.</td>
</tr>
<tr>
<td></td>
<td>4. <strong>ID (EmployeeID)</strong>: The unique PAC ID for the employee.</td>
</tr>
<tr>
<td></td>
<td>5. <strong>Co (Company)</strong>: The employee will be in CU1 unless s/he is a retiree then s/he will be in REIT.</td>
</tr>
<tr>
<td></td>
<td>6. <strong>(Pay) Group</strong>: Grouping of employee populations for payroll purposes.</td>
</tr>
<tr>
<td></td>
<td>7. <strong>Pay Period End</strong>: The end of the earnings period.</td>
</tr>
<tr>
<td></td>
<td>8. <strong>Check Dt</strong>: The Check Date for this pay period.</td>
</tr>
<tr>
<td></td>
<td>9. <strong>Off cycle</strong>: Y = Yes; N = No</td>
</tr>
<tr>
<td></td>
<td>(Continued):</td>
</tr>
<tr>
<td></td>
<td>10. <strong>Form ID</strong>: Identifies that the employee will receive their pay by printed check (CUCHK) or by direct deposit (CUDDA).</td>
</tr>
<tr>
<td></td>
<td>11. <strong>Check Nbr</strong>: Unique tracking number that is automatically assigned by the application during payroll processing. This number is also printed on the actual check.</td>
</tr>
<tr>
<td></td>
<td>12. <strong>Total Gross</strong>: Total gross pay for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>13. <strong>Total Taxes</strong>: Total taxes taken out for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>14. <strong>Total Deductions</strong>: Total deduction taken out for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>15. <strong>Net Pay</strong>: Net pay for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>16. <strong>DDA Suppressed</strong>: Y = Yes - employee does NOT receive a Direct Deposit Advice.</td>
</tr>
<tr>
<td></td>
<td>N = No - employee receives a Direct Deposit Advice.</td>
</tr>
<tr>
<td></td>
<td>BLANK - employee receives a paper check.</td>
</tr>
<tr>
<td>12.</td>
<td>You have completed &quot;View Departmental Payroll Register&quot; and now you can move on to the &quot;Employee Payroll History&quot; topic.</td>
</tr>
<tr>
<td></td>
<td><strong>End of Procedure</strong>.</td>
</tr>
</tbody>
</table>
View Employee Payroll History

Let's practice by viewing the *Employee Payroll History* payroll query.

**Procedure**

This is the "View Employee Payroll History" topic where you will learn how to view Employee Payroll History.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Employee Payroll History</strong> link.</td>
</tr>
</tbody>
</table>

Employee Payroll History
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 2.   | The **Message** displays instructing you NOT to leave any fields blank on the following screen and also instructs you to use a wildcard or "%" sign to search all items in that field.  
   Click the **OK** button. |
| 3.   | The **Employee Payroll History** lists total gross, total taxes, total deductions, and net pay for ONE employee in your department, over SEVERAL pay periods.  
   Enter the search criteria for:  
   1. **Empl ID**: Enter the Employee ID for the employee you want to view.  
   2. **Year**: Enter the year you wish to view or type "%" for all years in the PAC database. Do NOT leave this field blank. |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>This query is generated using the employee's Empl ID (employee ID). If unknown, first obtain the Empl ID from the View Employee Personal Information page. For this example enter &quot;10183866&quot; into the <strong>Empl ID</strong> field.</td>
</tr>
<tr>
<td>5.</td>
<td>Enter the year for the payrolls to view. For this example, enter &quot;2014&quot; into the <strong>Year</strong> field.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>View Results</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>7.</td>
<td>The Employee Payroll History fields are:</td>
</tr>
<tr>
<td></td>
<td>1. <strong>Dept ID</strong>: This is the employee's admin department.</td>
</tr>
<tr>
<td></td>
<td>2. <strong>UNI</strong>: The employee's UNI.</td>
</tr>
<tr>
<td></td>
<td>3. <strong>Name</strong>: Employee's name.</td>
</tr>
<tr>
<td></td>
<td>4. <strong>ID (EmployeeID)</strong>: The unique PAC ID for the employee.</td>
</tr>
<tr>
<td></td>
<td>5. <strong>Co (Company)</strong>: The employee will be in CU1 unless s/he is a retiree then s/he will be in REIT.</td>
</tr>
<tr>
<td></td>
<td>6. <strong>(Pay) Group</strong>: Grouping of employee populations for payroll purposes.</td>
</tr>
<tr>
<td></td>
<td>7. <strong>Pay Period End</strong>: The end of the earnings period.</td>
</tr>
<tr>
<td></td>
<td>8. <strong>Check Dt</strong>: The Check Date for this pay period.</td>
</tr>
<tr>
<td></td>
<td>9. <strong>Year</strong>: The earning's year (calendar).</td>
</tr>
<tr>
<td>8.</td>
<td>(Continued):</td>
</tr>
<tr>
<td></td>
<td>10. <strong>Off cycle</strong>: Y = Yes; N = No.</td>
</tr>
<tr>
<td></td>
<td>11. <strong>Form ID</strong>: Identifies that the employee will receive their pay by printed check (CUCHK) or by direct deposit (CUDDA).</td>
</tr>
<tr>
<td></td>
<td>12. <strong>Check Nbr</strong>: Unique tracking number that is automatically assigned by the application during payroll processing. This number is also printed on the actual check.</td>
</tr>
<tr>
<td></td>
<td>13. <strong>Total Gross</strong>: Total gross pay for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>14. <strong>Total Taxes</strong>: Total taxes taken out for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>15. <strong>Total Deductions</strong>: Total deduction taken out for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>16. <strong>Net Pay</strong>: Net pay for the designated pay period.</td>
</tr>
<tr>
<td></td>
<td>17. <strong>DDA Suppressed</strong>: Y = Yes - employee does NOT receive a Direct Deposit Advice.</td>
</tr>
<tr>
<td></td>
<td>N = No - employee receives a Direct Deposit Advice.</td>
</tr>
<tr>
<td></td>
<td>BLANK - employee receives a paper check.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
9. | You have completed the "View Employee Payroll History" topic and can now move on to the "Department Time Entry" topic. **End of Procedure.**

HR Manager Reports

**HR Manager Reports - from the HR Data Store - Updated March 2016**

HR Manager Reports are located in the HR Data Store within the University Data Store (UDS). There are many reports available to help you manage day to day activities.

Below is the listing of the HR Manager Reports.

1. Active Positions and Incumbents Report
2. Active Positions Report
3. Employee Personal and Job Data Report by Bargaining Unit
4. Employee Personal and Job Data Report by Job Function
5. Employee Personal Data Report by Bargaining Unit
6. Employee Personal Data Report by Job Function Employee Vacation Accrual Post-Docs Demographics Report
7. Employee Vacation Accrual
8. Post-Docs Demographics Report
9. Salary Planning Report - *available May - July to users with eComp access*
10. Termination Report
11. Upcoming/Past Appointment End Date Report
12. Upcoming/Past Visa/Permit Expiration Date Report

Accessing HR Manager Reports

**Accessing HR Manager Reports**
The HR Manager Reports are accessible through the myColumbia portal from either the HR Manager Resources or Enterprise Reporting tabs.

- From the HR Manager Resources page - click the "HR Manager Reports" link below the 'Reports' section on the page
- From the Enterprise Reporting page - click the "My Business Objects InfoView Reports" link below the 'Reports' section
Navigate to the HR Manager Reports Folder - HR Report Only Users

**Navigate to the HR Manager Reports Folder - HR Report Only Users**
Once you log in to myColumbia and access the report page from either the HR Manager Resources or Enterprise Reporting page, the landing page is the Home Tab which is the Launchpad. The Launchpad is a reporting dashboard that displays scheduled and recently run reports. Scheduling is not currently used with HR reports; therefore, this page will not provide you with much detail.
The **Documents** tab is where you can see the list of available reports. If you prefer to have the Documents list be your landing page, please refer to the upcoming Preferences section on how to change your settings.

Navigate to the HR Manager Reports - Finance and HR Users

**Navigate to the HR Manager Reports Folder - Finance and HR Report Users**

Once you log in to myColumbia and access the report page from either the HR Manager Resources or Enterprise Reporting page, the landing page is the Home Tab which is the Launchpad. If you also have access to Finance reports, the landing page is the Finance Launchpad. The Finance Launchpad provides a quick view of scheduled and recently run Finance reports. It does not display details for other reports, e.g. HR. If you prefer to have the Documents list be your landing page, please refer to the upcoming Preferences section on how to change your setting.
Setting Preferences

The Launchpad (home tab) is the landing page once logged in to the site. The general preferences of the Launchpad determine what appears in the default view and your default view is based on your user group(s), (e.g. CAPS, HR, and FINERP Users). However, you have the option to select the Documents tab as your landing page.

To Modify Settings

- Click on Preferences

The Preferences screen appears.

- Click on General
- Clear/uncheck the "Use Default Settings (Administrator defined)" box
- Once "Use Default Settings (Administrator defined)" is unchecked you will be able to proceed and modify

*To restore back to the default view, check/select the "Use Default Settings (Administrator defined)" box.

Setting Preferences, continued

To display the Documents tab as your default

1. Select “Documents tab”
2. Select “Folders”
3. Select “Public Folder: Browse folder". The available Report folder list is displayed; this list is based on your access
4. Choose the folder you want as default (HR is chosen in example)
5. Click 'Open'
6. Click Save & Close
7. Reload your browser for the changes to apply
Access a Report

**Access a Report**
Click the "Documents" tab and then click the HR folder to view the report list. All of the available reports for HR are displayed. To access a report, double-click the report and the report displays. The reports initially are displayed in HTML format and there are options to save the file in Excel, PDF or Comma delimited if you so choose.

If the reports do not automatically display upon click the "Documents" tab, click the plus sign next to the 'Public Folders' link to expand the report types (available to you per your access) and then click the folder for the suite of reports you would like to see. Once report area is selected, e.g. HR, the listing of available reports displays under the Title column.
View a HR Manager Report - without parameters

**Viewing a HR Manager Report - without parameters**
Once a report is selected, it either displays the information as a chart on the page or it will ask you to enter additional parameters. Below is an example of a report displaying information where no additional parameters need to be entered. Each report also includes a 'Report Description' that provides a brief description of the report along with the parameters selected, if applicable. Click the 'Report Description' link on the left hand menu to display the description.

![Report Display Example](image1.png)

View a HR Manager Report - with parameters

**Viewing a HR Manager Report - with parameters**
Here is an example of generating a report where additional parameters need to be entered. The parameters differ depending upon the report. A complete listing of reports and their parameters follows.

When you 'double click' on the report, the report's parameter entry screen is displayed.

![Report Parameter Entry](image2.png)
Items with a green check mark indicate that a choice is selected. Some choices default upon report opening but can be changed as needed. In this example all departments you have access to along with all employee job functions and statuses are defaulted to appear. To change any of these, click a report prompt from the left hand side and then click the "Refresh Values" icon and the list to choose from appears. From there you can select an individual item and move it to the selection.

Items with a red arrow indicate that a selection must be made. Once all selections are made, the "OK" button becomes active and the report can be run.

Saving Prompt Selections for Future Report Runs

**Saving Prompt Selections for Future Report Runs**
On the top of the parameter entry screen is a field titled, "Available prompt variants". This feature allows you to save frequently used prompts.

After you enter the selection criteria, click the "create prompt variant button" which is the disc icon with the green plus sign. Then enter a name for the report and click "OK".
To use the created variant, when you open a new report, on the prompts screen, click the drop down arrow on the available prompts variant box and select the variant you created. The already selected prompts that were saved will be used to generate the report.

Saving a Report

**Saving a Report**

Use the export Document dropdown list to save the report to your computer. Do not use the "save icon".

- Click the drop down arrow next to 'Export Document' icon
- Select 'Export Document As'
- Select the file type (e.g. Excel, PDF, or CSV)
- 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)
Before viewing, saving or printing a report, ensure that you 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 Generated Report

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

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

Note on the Refresh Data Button

- On the 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.
Generate a HR Manager Report

Let's practice generating an HR Manager Report...

Procedure

In this topic you will learn how to Generate a HR Manager Report.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log in to myColumbia using your UNI and Password (my.columbia.edu).</td>
</tr>
</tbody>
</table>

2. Click the **HR Manager Resources** link.

3. Click the **HR Manager Reports** link within the Reports section of the page.

4. You arrive at the **Launchpad** (in **Home** tab).

   The general preferences of the Launchpad determine what appears in the default view and your default view is based on your user group(s), (e.g. CAPS, HR, and FINERP Users). However, you have the option to select the Documents tab as your landing page. Refer to the Setting Preferences topics for instructions.
**Step | Action**

5. Click the **Documents** tab to view the report list.

6. The report suite folders that you have access to are displayed.

7. If the reports within the folders do not automatically display upon clicking the Documents tab, click the plus sign next to the ‘Public Folders’ link to expand the report types (available to you per your access) and then click the folder for the suite of reports you would like to see.

   Click the **HR** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Now you can see the list of reports within the selected folder. Let's open a report. First we'll open a report that immediately displays the results without having to enter any parameters. Double-click the <strong>Active Positions Report</strong> link.</td>
</tr>
<tr>
<td>9.</td>
<td>The report opens defaulting to the description page. Note the highlighted page on the left hand and bottom navigation menus. To view the report click the report name link in either section.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Active Positions Report</strong> link.</td>
</tr>
<tr>
<td>11.</td>
<td>The report displays. In this example, the report headers are shown, the data is not.</td>
</tr>
<tr>
<td>12.</td>
<td>To close the report, click the 'x' on the right side of the tab for the report. Click the <strong>Close document</strong> (x) button.</td>
</tr>
<tr>
<td>13.</td>
<td>Let's practice generating a report where the entry of parameters is required. Double-click the <strong>Post-Docs Demographic Report</strong> link.</td>
</tr>
<tr>
<td>14.</td>
<td>In this report, the Department Range (Begin) and Department Range (End) department numbers are assumed and you can see they are set by the green check mark next to them. Where there is a red arrow, the parameter(s) need to be entered. Click the <strong>After Title Effective Date (M/D/YYYY)</strong>: link.</td>
</tr>
<tr>
<td>15.</td>
<td>Enter the information into the space. In this example, the date was selected from the calendar icon.</td>
</tr>
<tr>
<td>16.</td>
<td>Once all the required parameter entries are selected, the OK button becomes active. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>17.</td>
<td>The report generates. In this example you can see the column headers for the report and what information will be displayed.</td>
</tr>
<tr>
<td>18.</td>
<td>To <strong>Save</strong> a report into another format. Click the following: - the <strong>Export Document</strong> dropdown arrow - click ‘Export Document As’ - select the format to save in (such as Excel)</td>
</tr>
</tbody>
</table>
Active Positions and Incumbents Report

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

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

Report Parameters
This report does not require entry of additional parameters.

Report Results
The report results show:

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

**Active Position Report**
This report displays all active University positions that are vacant or filled.

**Report Use**
This report is useful to see all of the open positions in a department. In this version, you will not see the names of the employees who occupy (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 entry of additional parameters.

**Report Results**
The report results show:

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

Employee Personal and Job Data Report by Bargaining Unit

**Employee Personal and Job Data Report – by Bargaining Unit**
This report displays comprehensive personal and position related data for University employees in the selected administrative department(s) and bargaining unit(s) as recorded on PAC.

**Report Use**
This report is useful when additional personal or job data, not available in Manager Self-Service, is needed.
Report Parameters
This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires five prompts to be entered. Click on each value to select and then click on the “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):
Each user has a listing of his\her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

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

If you choose to limit the department list you can do so by clicking the Refresh Values options on the right side of the screen then double-clicking on the desired Department value. Or, to enter a specific department, click on “Enter Admin Department Number” (Start) and “Enter Admin 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.

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 hand 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 term prompt](image)

**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
Employee Personal and Job Data Report by Job Function

**Employee Personal and Job Data Report – by Job Function**
This report displays comprehensive personal and position related data for University employees in the selected administrative department(s) and job function(s) as recorded on PAC.

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

**Report Parameters**
This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires five prompts to be entered. Click on each value to select and then click on the “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):
Each user has a listing of his\her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

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

If you choose to limit the department list you can do so by clicking the Refresh Values options on the right side of the screen then double-clicking on the desired Department value. Or, to enter a specific department, click on “Enter Admin Department Number” (Start) and “Enter Admin 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.

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 hand 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.

**Report Results**

The report results show:

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

Employee Personal Data Report by Bargaining Unit

**Employee Personal Data Report – by Bargaining Unit**
This report displays comprehensive personal data for University employees in the selected administrative department(s) and bargaining unit(s) as recorded on PAC.

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

**Report Parameters**
This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires five prompts to be entered. Click on each value to select and then click on the “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 (use % for ALL)
• Select Term
Admin Department Number (Start & End):
Each user has a listing of his/her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.
Click on the “Department Range” (Start) and “Department Range (End)” lines on the top of the screen.

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

If you choose to limit the department list you can do so by clicking the Refresh Values options on the right side of the screen then double-clicking on the desired Department value. Or, to enter a specific department, click on “Enter Admin Department Number” (Start) and “Enter Admin 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 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 hand 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.

**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

**Employee Personal Data Report – by Job Function**
This report displays comprehensive personal data for University employees in the selected administrative department(s) and job function(s) as recorded on PAC.

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

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

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

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

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

If you choose to limit the department list you can do so by clicking the Refresh Values options on the right side of the screen then double-clicking on the desired Department value. Or, to enter a specific department, click on “Enter Admin Department Number” (Start) and “Enter Admin 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.

**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 hand 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.

**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

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

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

**Report Parameters**
This report does not require entry of additional parameters.

**Report Results**
The report results show:

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

---

Post-Docs Demographics Report

**Post-Docs Demographic Report**
This report displays demographic data for all first time post-docs by department and title effective date.

**Report Use**
This report is useful to obtain post-doc data.

**Report Parameters**
This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires three prompts to be entered. Click on each value to select and then click on the “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.

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

After Title Effective Date:
Click on the “After Title Effective Date” prompt and then click the calendar icon to the right hand side of the text box in the middle of the screen to display the calendar. From there, click on the arrows in the calendar to navigate to the date. Click on the day in the month and year and the date will appear.

Report Results
The report results show:
- Name
- UNI
- Administrative Department Name
- Title
- Title Effective Date
- Year
- Month

Salary Planning Report - available May - July to users with e-Comp Report Access

Salary Planning Report - available May - July to users with e-comp Report Access
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 hand side.

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

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

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

Report Parameters
This report does require additional information to be entered. This report requires four prompts to be entered. Click on each value to select and 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):
Each user has a listing of his/her Admin Department(s) that are available. Although the range is greater only those departments that you have access to will be displayed.

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

If you choose to limit the department list you can do so by clicking the Refresh Values on the right side of the screen then double-clicking on the desired Department value. Or, to enter a specific department, click on “Enter Admin Department Number” (Start) and “Enter Admin 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.

From Date and To Date:
Click on the “From Date” and “To Date” lines on the top of the screen. After clicking each line, click the calendar icon to the right hand side of the text box in the middle of the screen to display the calendar. From there, click on the arrows in the calendar to navigate to the date. Click on the day in the month and year and the date will appear.
Report Results
The report results show:

- Employee ID, Employee Record Number
- Name
- Department ID (Number)
- Title
- Job Code
- Grade
- Action Reason
- Effective Termination Date
Upcoming/Past Appointment End Date Report

**Upcoming/Past Appointment End Date Report**
This report displays summary data for all employees whose appointment end date occurs within three months from the date the report is run. This report also lists employees whose appointment end dates have passed.

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

**Report Parameters**
This report does not require entry of additional parameters.

**Report Results**
The report results show:

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

Upcoming/Past Visa/Permit Expiration Date Report

**Upcoming/Past Visa/Permit Expiration Date Report**
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 entry of additional parameters.

**Report Results**
The report results show:

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

**Appendix**

This is the *Appendix lesson* of the *Manager Self Service* course. Upon completion of this lesson, you will be able to:

- View the Pay Calendar
- Review Earnings Codes and Descriptions
- Review Deduction Codes
- View Sample Officer and Support Staff Paystubs
- Review Action and Reason Codes
- View Resources for Help and Information

**Estimated Time to Complete Lesson:** 5 minutes

**Pay Calendar**

**Pay Calendar**
The Pay Calendar is a campus specific chart listing of all fiscal year pay dates. The calendar also includes key dates and deadlines for electronic or paper transaction submissions and when the paychecks can be viewed by the employees online.

For more information and to access pay calendars, visit the Pay Calendar ([http://hr.columbia.edu/paycalendar](http://hr.columbia.edu/paycalendar)) page on the HR website.
Earnings, Deductions, and Action and Reason Codes

**Earnings Codes and Descriptions**
Earnings Codes specify the type of payments an employee receives along with related tax withholding, benefits information and fringe rate. Earning codes can be campus, department, employee-type or position specific (i.e. for summer session instructional payments only).

**Deduction Codes and Description**
Deduction Codes and Descriptions are helpful when reading a pay advice. To view the listing of deduction codes and their descriptions, access the job aid available on the Course Catalog (http://hr.columbia.edu/course-catalog/search) on the HR website.

**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. Actions occur for a variety of reasons. Therefore, the codes allow for the many possible reasons. The various combinations of Actions and Reason on the Job Data and Position Data pages specify what the system records in the position history and employee history. For each action, you can select from a list of valid reasons.

To view the listing of action and reason codes and their descriptions, access the job aid available on the Course Catalog (http://hr.columbia.edu/course-catalog/search) on the HR website.

**Sample Officer Paystub**

**Sample Officer Paystub**
Below is a view of a sample officer employee paystub.
### General

- **Company:** Columbia University
- **Address:** 615 West 131th Street, 4th Floor, Payroll Division, New York, NY 10027
- **Net Pay:** $1,275.02
- **Pay Begin Date:** 08/01/2010
- **Pay End Date:** 09/15/2010
- **Check Date:** 09/13/2010

#### Business Unit:
- **CUBUS**

#### Pay Group:
- **Officers**

#### Department:
- **0180000 - Irving Inst Clin/Tra**

#### Location:
- **Columbia Univ Medical Center**

#### Job Title:
- **Supervisor - Coord - ADMIN**

#### Pay Rate:
- **$1,009.59**

### Tax Data

- **Fed Marital Status:** Single
- **NY Marital Status:** Single or Head of Household
- **Fed Allowances:** 0
- **NY Allowances:** 0
- **Fed Add Percent:** 0.000
- **NY Add Percent:** 0.000
- **Fed Add Amount:** $0.00
- **NY Add Amount:** $0.00

### Paycheck Summary

<table>
<thead>
<tr>
<th></th>
<th>Gross Earnings</th>
<th>Fed Taxable Gross</th>
<th>Total Taxes</th>
<th>Total Deductions</th>
<th>Net Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current</strong></td>
<td>1,908.58</td>
<td>1,817.08</td>
<td>542.06</td>
<td>91.50</td>
<td>1,275.02</td>
</tr>
<tr>
<td><strong>YTD</strong></td>
<td>28,179.78</td>
<td>29,367.28</td>
<td>7,936.14</td>
<td>1,372.50</td>
<td>18,871.14</td>
</tr>
</tbody>
</table>

### Earnings

<table>
<thead>
<tr>
<th>Description</th>
<th>Hours</th>
<th>Rate</th>
<th>Amount</th>
<th>YTD Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reg Eam</td>
<td>1,909.58</td>
<td>20,179.78</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Taxes

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>YTD Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fed Withholding</td>
<td>257.10</td>
<td>3,744.70</td>
</tr>
<tr>
<td>Fed MED/EE</td>
<td>27.07</td>
<td>399.59</td>
</tr>
<tr>
<td>Fed OASDI/EE</td>
<td>115.76</td>
<td>1,709.55</td>
</tr>
<tr>
<td>NY Withholding</td>
<td>89.02</td>
<td>1,288.58</td>
</tr>
<tr>
<td>NY OASDI/EE</td>
<td>1.30</td>
<td>19.50</td>
</tr>
<tr>
<td>NY NYC Withholding</td>
<td>52.79</td>
<td>774.10</td>
</tr>
</tbody>
</table>

### Before-Tax Deductions

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>YTD Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>DENTAL</td>
<td>9.50</td>
<td>142.50</td>
</tr>
<tr>
<td>MEDICAL</td>
<td>32.00</td>
<td>480.00</td>
</tr>
<tr>
<td>TDA - Vanguard</td>
<td>60.00</td>
<td>760.00</td>
</tr>
</tbody>
</table>

### After Tax Deductions

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>YTD Amt</th>
</tr>
</thead>
</table>

### Employer Paid Benefits

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>YTD Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>CU RAP - Vanguard</td>
<td>140.14</td>
<td>2,113.50</td>
</tr>
</tbody>
</table>

### Total

- **Before-Tax:** $91.50 1,372.50
- **After-Tax:** $0.00
- **Total:** $143.14 2,113.50
Sample Support Staff Paystub

Below is a view of a sample support staff employee paystub.

| Company: Columbia University                      | Net Pay: $732.30 |
| Address: 615 West 131st Street, 4th Floor       | Pay Begin Date: 06/01/2010 |
| Payroll Division                                | Pay End Date: 07/04/2010 |
| New York, NY 10027                               | Check Date: 07/06/2010 |
| General:                                        |                  |
| Name: Debra A Smith                              | Business Unit: CUBUS |
| Employee ID:                                     | Pay Group: Support Staff |
| SIN:                                             | Department: 4770000 - Environ Health Sci |
| Address: Mailman School of Public Health         | Location: Columbia Univ Medical Center |
| c/o C. Decato                                    | Job Title: Admin Employee - ADMN |
| RSS Box 040, MSPH Env Health Sci                | Pay Rate: $1,164.11 |
|                                                 | Weekly |
| Tax Data:                                        |                  |
| Fed Marital Status: Single                       | NY Marital Status: Single or Head of Household |
| Fed Allowances: 1                                | NY Allowances: 0 |
| Fed Add Percent: 0.000                           | NY Add Percent: 0.000 |
| Fed Add Amount: $8.00                            | NY Add Amount: $8.00 |
| Paycheck Summary:                                |                  |
| Gross Earnings: 931.30                          | Fed Taxable Gross: 931.30 |
| Total Taxes: 199.00                              | Total Deductions: 4,118.28 |
| Total Net Pay: 732.30                            |                  |
| Earnings:                                        |                  |
| Description | Hours | Rate | Amount | YTD Amount |
| Reg. Hour   | 56.00  | 16.30275 | 931.30   | 15,654.25  |
| Add Comp Pen| 1.00   | 1,920.00  |          |           |
| Total       | 56.00  | 931.30   | 16,545.25|           |
| Taxes:                                              |                  |
| Description | Amount | YTD Amount |
| Fed Withholding | 76.52  | 1,771.00  |
| Fed MED/DVEE | 13.50  | 238.04    |
| Fed OAS/DVEE | 57.75  | 1,031.95  |
| NY Withholding | 31.16  | 676.50    |
| NY OAS/DVEE | 1.20   | 16.30     |
| NY NYC Withholding | 20.97  | 405.30    |
| Total       | 199.00 | 4,118.28  |
| Before Tax Deductions:                            |                  |
| Description | Amount | YTD Amount |
| TIP/RAT/   | 524.00 |           |
| After Tax Deductions:                             |                  |
| Description | Amount | YTD Amount |
| OPTUfe     | 11.52  |           |
| SSA Dua    | 69.34  |           |
| Total       | 534.00 | 813.36    |
| Employer Paid Benefits:                           |                  |
| Description | Amount | YTD Amount |
| CU RAP - Vanguard | 796.14 |           |
| Total       | 796.14 |           |
| Net Pay Distribution:                             |                  |
| Payment Type | Paycheck Number | Account Type | Account Number | Amount |

* Taxable
Resources for Help and Information

Columbia University Technical Help Desks
There are two Columbia technical help desks: CUIT and 5-Help.

CUIT Help Desk – Morningside Campus
The CUIT Help Desk is the first point of contact for both academic and administrative users around the University. Users can walk-in, phone, or email issues to CUIT for troubleshooting.

CUIT Helpdesk                  CUIT Helpdesk Support Center
(212) 854-1919              202 Philosophy Hall
Mon–Thu 8am–11pm          Mon–Fri, 10am–6pm
Fri, 8am–7pm
Sat, 10am–6pm
Sun, 3pm–11pm

Email                        Web
askcuit@columbia.edu (mailto:askcuit@columbia.edu)
www.columbia.edu/acis/support (http://www.columbia.edu/acis/support)

“5 Help” Desk – Medical Center Campus
5-HELP (5-4357) is the one stop call center for Columbia Medical Center staff, faculty and students that offers 24x7 technical assistance. The Medical Center community should call 5-HELP first for all technical support.

- Hours: 7 Days a Week, 24 Hours a Day
- Phone: 212-305-4357 (HELP)
- Web: http://www.cumc.columbia.edu/it/about/service_desk/ (http://www.cumc.columbia.edu/it/about/service_desk/)

Lamont-Doherty, Nevis, and Other Campuses
Each of these campuses has a local desktop support specialist. If you are located on one of these campuses, please contact your departmental administrator for the specialist that is responsible for your location.

Human Resources Department Help
If you have any questions about the information that you see in Manager Self Service, please submit an electronic inquiry via Service Now - https://columbia.service-now.com/navpage.do (https://columbia.service-now.com/navpage.do). You may also contact your HR Client Manager in Morningside or CUMC Central Human Resources and/or the HR Service Center at 212-851-2888.

Visit the HR website for information on University Human Resources policies and processing, benefits plan details, and forms. Web: http://www.hr.columbia.edu (http://www.hr.columbia.edu/)

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Check Your Understanding

Check Your Understanding: Manager Self Service (MSS)

Let's review the topics covered.

Fill in the Blanks/Short Answer:

1. What is "MSS"?

2. When performing searches in PAC, recall that you can use special characters like the wildcard or ___________ or the ___________ character, which means "any one character here".

3. A ____________ or _____ is generated when you wish to make a change on an employee's record.

4. True or False? The Departmental Earnings Register displays and lists regular, overtime and other earnings for employees in your department for one designated pay period.

5. True or False? The Employee Personal and Job Data Report by Job Function report displays comprehensive personal and position related data for University employees in the selected administrative department(s) and job function(s) as recorded on PAC.

6. In PAC which codes are used to categorize job and position actions?

7. The employee personal information is located where in the menu? ____________________________

Answers to these questions can be found in the following section.
Answer Key

Below are the answers to the Check Your Understanding: Manager Self Service (MSS):

1. What is "MSS"? **Manager Self Service.**
2. When performing searches in PAC, recall that you can use special characters like the wildcard or ("%") or percent sign or the underscore ("_") character, which means "any one character here".
3. A **Personnel Action Form** or **PAF** is generated when you wish to make a change on an employee's record.
4. **True** or False? The **Departmental Earnings Register** displays and lists regular, overtime and other earnings for employees in your department for one designated pay period.
5. **True** or False? The **Employee Personal and Job Data Report by Job Function** report displays comprehensive personal and position related data for University employees in the selected administrative department(s) and job function(s) as recorded on PAC.
6. In PAC which codes are used to categorize job and position actions? **Action and Reason Codes**.
7. The employee personal information is located where in the menu? **It is located within the the Manager Self Service menu within the Job and Personal Information folder.**

Course References

**Course References**
You can access the Lessons, Job Aids, Policies, and Procedures that were referenced throughout this course in the Course Catalog on the HR Website:

**Lesson:**
Manager Self Service (MSS) Training Guide ([http://hr.columbia.edu/course-catalog/search](http://hr.columbia.edu/course-catalog/search))

**Job Aids**
Web-Based Training Tool Reference Guide ([http://hr.columbia.edu/course-catalog/search](http://hr.columbia.edu/course-catalog/search))
How to Create Favorites in PAC ([http://hr.columbia.edu/course-catalog/search](http://hr.columbia.edu/course-catalog/search))
How to Navigate in PAC ([http://hr.columbia.edu/course-catalog/search](http://hr.columbia.edu/course-catalog/search))

**Websites:**
Columbia University Human Resources Website ([http://hr.columbia.edu/](http://hr.columbia.edu/))
Course Catalog (in the HR Website) ([http://hr.columbia.edu/course-catalog/search](http://hr.columbia.edu/course-catalog/search))
CourseWorks ([https://courseworks.columbia.edu/welcome/](https://courseworks.columbia.edu/welcome/))
HR Service Center ([http://hr.columbia.edu/contact-us/welcome-human-resources-service-center](http://hr.columbia.edu/contact-us/welcome-human-resources-service-center))
### Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARC</td>
<td>Accounting and Reporting at Columbia, our finance system.</td>
</tr>
<tr>
<td>Cost Transfers</td>
<td>Ability to change the accounting for an employee's salary or add comp retroactively in PAC. Also refers to the retroactive transfer of expenditures from one account to another.</td>
</tr>
<tr>
<td>CU</td>
<td>Columbia University.</td>
</tr>
<tr>
<td>CUIT</td>
<td>Columbia University Information Technology.</td>
</tr>
<tr>
<td>CUMC</td>
<td>Columbia University Medical Center.</td>
</tr>
<tr>
<td>Data Warehouse</td>
<td>A retired portal that housed various reports. Also known as DWH or DWR.</td>
</tr>
<tr>
<td>Earn Code</td>
<td>Specifies the type of payment with related tax withholding, benefits information and fringe rate. Also known as Earnings Code.</td>
</tr>
<tr>
<td>Earnings Code</td>
<td>Specifies the type of payment with related tax withholding, benefits information and fringe rate. Also known as Earn Code.</td>
</tr>
<tr>
<td>E-Comp</td>
<td>Electronic Compensation. The annual process by which departments enter compensation changes in PAC.</td>
</tr>
<tr>
<td>EmplID</td>
<td>Employee ID: Unique identification code for an individual associated with the University.</td>
</tr>
<tr>
<td>Employee Self-Service</td>
<td>ESS. Employee Self-Service is a set of pages in PAC that allows employees to view and edit their personal data. Also known as Self-Service.</td>
</tr>
<tr>
<td>E-Term</td>
<td>Electronic termination. A function within Manager Self-Service in PAC to submit electronic terminations for Administrative staff.</td>
</tr>
<tr>
<td>Field</td>
<td>An area on a page that displays or requires data.</td>
</tr>
<tr>
<td>Fringe Rate</td>
<td>The percentage charged to departments applied to salaries as they are paid out and charged in ARC. Fringe is used to fund the Columbia University paid benefits (pension, medical, etc) and tax related expenses (FICA, Medicare, etc).</td>
</tr>
<tr>
<td>HRPC</td>
<td>Human Resources Processing Center.</td>
</tr>
<tr>
<td><strong>Labor Accounting</strong></td>
<td>Manages an employee’s salary profile, additional compensation, and cost transfers.</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Manager Self-Service</strong></td>
<td>MSS. Manager Self-Service is a set of pages in PAC that allows managers to view job and personal data for the employees in their departments.</td>
</tr>
<tr>
<td><strong>Module</strong></td>
<td>Groupings of software programs that collectively support a specific business function.</td>
</tr>
<tr>
<td><strong>MSS</strong></td>
<td>Manager Self-Service. A set of pages in PAC that allows managers to view job and personal data for the employees in their departments.</td>
</tr>
<tr>
<td><strong>PAC</strong></td>
<td>People@Columbia. The customized version of PeopleSoft Human Resources Capital Management that integrates and processes all Human Resources and Payroll transactions for Columbia University including hire/rehire, salary distribution, additional compensation and cost transfer transactions.</td>
</tr>
<tr>
<td><strong>PAF</strong></td>
<td>Personnel Action Form - used to convey individual personnel data to HR and Payroll systems.</td>
</tr>
<tr>
<td><strong>REG</strong></td>
<td>Regular Earnings - refers to the most commonly used payroll earnings code.</td>
</tr>
<tr>
<td><strong>Role</strong></td>
<td>A named set of work that a user can do. A role is associated with one or more permission lists that authorize access to particular system functions.</td>
</tr>
<tr>
<td><strong>TBH</strong></td>
<td>Template-Based Hire. A function within PAC where new hire and rehire transactions are initiated electronically in the departments and schools through PAC templates.</td>
</tr>
<tr>
<td><strong>UNI</strong></td>
<td>University Network Identification.</td>
</tr>
<tr>
<td><strong>University Data Store</strong></td>
<td>The data warehouse repository (UDS). The place where data from ARC, HR / Labor Accounting, Student, and Historical / Legacy system data will be stored.</td>
</tr>
<tr>
<td><strong>Workflow</strong></td>
<td>The routing of transactions based on rules.</td>
</tr>
<tr>
<td><strong>Worklist</strong></td>
<td>The automated to-do list created by workflow. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.</td>
</tr>
</tbody>
</table>