

HRMS BAIRS Reporting

Earnings Distribution Report Parameter Page (Dashboard) Demonstration

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Earnings Distribution Report Parameter Page (Dashboard)

Main Page

Administer Work Force Earnings Distribution Criteria

Date Options: Effective Date Entry Date As Of Date Include Historical/Future Data

To: mm/dd/yyyy

Employees: All Employees All Org Nodes Org Node Codes Org Node Names incl. Subordinate Levels

Add One List

All Jobs All Appointment Types

All Accounts All Funds Add One List Range All Org Codes

All Employment Statuses All Action/Reasons

A D L P T

A - Active, D - Deceased, L - Leave, P - Paid Leave, T - Term

- Dashboard opens with pre-set defaults
- Use “Reset Defaults” bar to return to original defaults

PARAMETER ELEMENTS OF THE REPORT DASHBOARD:

Date Options:

Date Options:	<input checked="" type="radio"/> Effective Date	<input type="radio"/> Entry Date	<input type="radio"/> As Of Date	<input type="checkbox"/> Include Historical/Future Data
	<input type="text" value="01/11/2002"/>	To:	<input type="text" value="01/11/2003"/>	mm/dd/yyyy

Reference: <http://hrweb.berkeley.edu/hrms/hrbairs/prehrmsdata.htm>

Effective Date Range: Inclusive dates to collect effective dated rows of HRMS data. Note: converted data may have effective dated rows earlier than 7/1/2002; recommend using 01/01/2000 or earlier.

Example: 01/01/2002 To: 01/15/2003

Entry Date Range: Inclusive dates to collect rows of HRMS data based on the date entered into HRMS.

Date Range Example: 01/01/2003 To: 01/15/2003

Or

Single Date Example: 01/15/2003 To: 01/15/2003

Include Historical/Future Data: Check this box if you want to report on ALL ROWS of data – history, current and future rows. Note: A report run with “include Historical/Future Data” will reflect row data from the entire employee record; this is a critical element that can result in data overload. Be sure you want to look at all rows before selecting this option.

As of Date:

Date Options:	<input type="radio"/> Effective Date	<input type="radio"/> Entry Date	<input checked="" type="radio"/> As Of Date
	<input type="text" value="01/1/2003"/>		mm/dd/yyyy

Select records on an “as-of” or “snapshot” calendar date. For example, running a report of current row data as of January 1st, 2003. Note: The “Include Historical/Future Data” is not an option for As of Date which collects data from the current data rows.

Employees:

Employees: All Employees

Default setting will provide a report of all employees within your security access.

or

Unchecking “All Employees” provides the option to create a specific list of employee ID’s to report on.

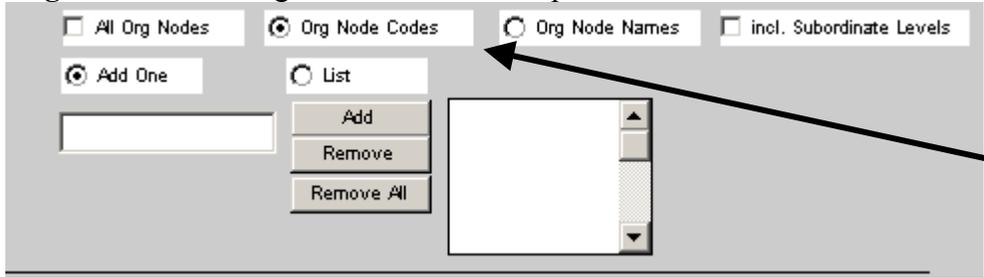
Employees: All Employees

Add
Remove
Remove All

011186521

Build value list using Add and Remove buttons to select specific Employees for the report.

Org Nodes of the Organization Tree for report data collection:



Default is set to require adding one or more nodes. (A positive action is required to select “All”.)

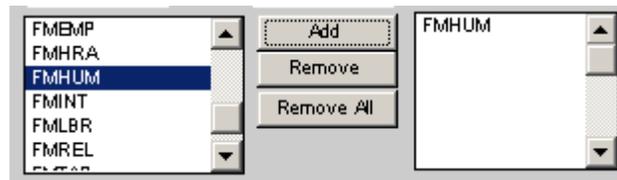
All Org Nodes, when selected, will provide a report for all nodes within the user’s security access.

Org Node Codes allows the user to build a value list of Org Nodes to be reported on.



allows user to key enter Org Nodes

allows users to pick Org Node Codes from a list:



Build value list using Add and Remove buttons to select specific Org Nodes for the report.

Org Node Names allows users to pick from a name list:



Build value list using Add and Remove buttons to select specific Org Node Names for the report.

Incl. Subordinate Levels, when selected, will include Org Nodes that fall under the Org Node selected for the report. For example, a report on an Org Tree Level 4 Node “FMHUM” will also include any data related to levels 5, 6, and 7 of the Org Tree.

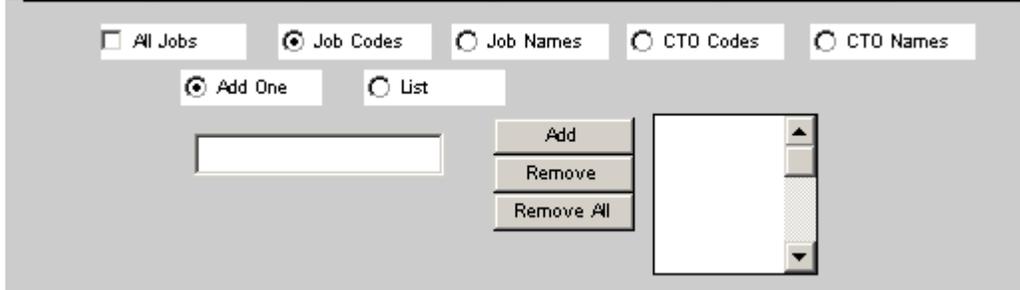
Jobs:



Default is set for All Jobs.
(Assumes most Earnings Distribution reports would be for all jobs.)

or

Unchecking “All Jobs” provides the option to create a specific list of job’s to report on:

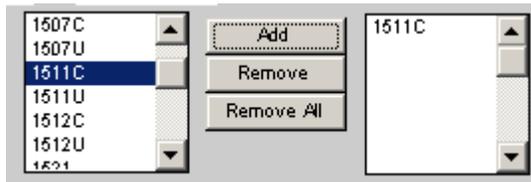


All Jobs will provide a report on all job codes within the user’s security access.

Job Codes allows the user to build a value list of Jobs to be reported on:

Add One allows user to key enter Job Codes

List allows user to pick Job Codes from a list:



Build value list using Add and Remove buttons to select specific Job Codes for the report.

Job Names allows users to pick from a job name list:



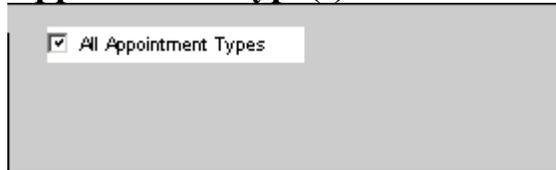
Build value list using Add and Remove buttons to select specific Job Names for the report.

CTO Codes and CTO Names (Class Title Outline or Occupational Subgroup Code)



These selections allow users to pick codes and names similar to the above process. (A select user population utilizes these selections.)

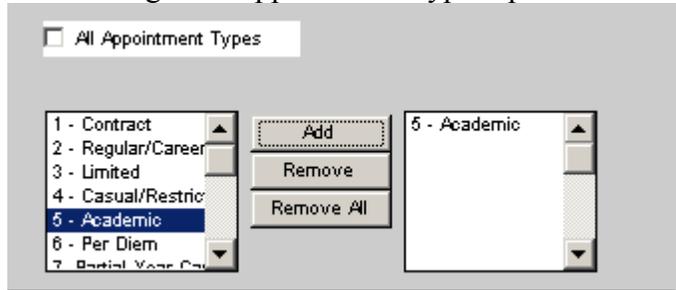
Appointment Type(s):



Default is set for All Appointment Types. (Assumes most Earnings Distribution reports would be for all appointment types.)

or

Unchecking “All Appointment Types” provides the option to create a specific list to report on:



Build value list using Add and Remove buttons to select specific Appointment Types for the report.

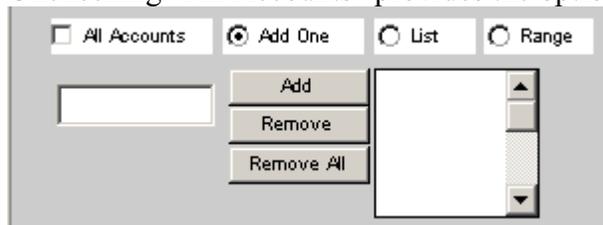
Accounts (Salary Account Codes):



Default is set for All Salary Accounts. (Assumes most Earnings Distribution reports would be for all accounts.)

or

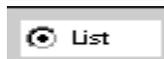
Unchecking “All Accounts” provides the option to create a specific list of Salary Accounts to report on:



All Accounts will provide a report on all salary account codes for employees reported on.



allows user to key enter salary account codes



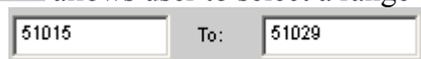
allows user to pick salary account codes from a list:



Build value list using Add and Remove buttons to select specific Salary Accounts for the report.



allows user to select a range of salary accounts:



Funds:

The screenshot shows a control panel for selecting funds. It includes a checkbox labeled "All Funds" which is currently unchecked. To its right are three radio buttons: "Add One" (which is selected), "List", and "Range". Below these are three buttons: "Add", "Remove", and "Remove All". A list box is positioned to the right of the buttons, currently empty.

Default is set to require adding one or more Funds. (A positive action is required to select "All Funds".)

All Funds will provide a report for all funds within a user's security access.

Add One allows the user to key enter Fund Codes

List allows the user to pick Fund Codes from a list:

This screenshot illustrates the "List" selection method. On the left, a list of fund codes is shown: 19900, 19901, 19904, 19905, 19908, and 19909. In the center are three buttons: "Add", "Remove", and "Remove All". On the right, a list box contains the code "19900".

Build value list using Add and Remove buttons to select specific Fund Codes for the report.

Range allows the user to enter a range of Fund Codes:

The screenshot shows the "Range" selection method. It consists of two text input fields. The first field contains the value "19900" and the second field contains "19999". A "To:" label is positioned between the two fields.

Org Codes:

The screenshot shows the "All Org Codes" selection method. A checkbox labeled "All Org Codes" is checked.

Default is set for All Org Codes. (Assumes most Earnings Distribution reports would be for all Org Codes.)

or

Unchecking "All Org Codes" provides the option to create a specific list of Org Codes to report on:

This screenshot shows the "Add One" selection method for Org Codes. The "All Org Codes" checkbox is unchecked. The "Add One" radio button is selected. The interface includes a text input field, "Add", "Remove", and "Remove All" buttons, and an empty list box.

Build value list using Add and Remove buttons to select specific Org Codes for the report.

Add One, List, and Range functions are the same as described above.

Employment Status:

All Employment Statuses

A	<input type="button" value="Add"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/>	
D		
L		
P		
T		

A - Active, D - Deceased, L - Leave, P - Paid Leave, T - Term

Default is set to require adding one or more employment statuses. (A positive action is required to select "All".)

Select individual or **All Employment Statuses** depending on the data-reporting requirement. (A typical Earnings Distribution Report against current data rows might be run for A, L and P to capture current staff distributions; selecting **All Employment Statuses** would provide a comprehensive staff report including staff no longer present.)

Action/Reason:

All Action/Reasons

Default is set for All Action/Reasons. (Assumes most Earnings Distribution reports would be for all Action/Reasons.)

or

Unchecking "All Action/Reasons" provides the option to create a specific list of Actions or Action/Reason combinations to report on:

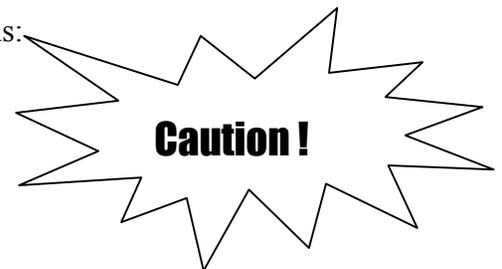
All Action/Reasons Actions Action Reasons

Add	<input type="button" value="Add"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/>	
Addl Job		
Assgn Comp		
Assignment		
Award Mnt		

Actions allows users to build a value list from a list of Actions:

All Action/Reasons Actions Action Reasons

Data Chg	<input type="button" value="Add"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/>	Hire
Demotion		Ems Distn
Detail		
End of Det		
Ems Distn		
Extension		



Action Reasons allows users to build a value list from Action/Reason Combinations:

All Action/Reasons Actions Action Reasons

HIR - Transfer from U	<input type="button" value="Add"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/>	JED - Distribution
JED - Distribution		JED - Mass COA Cha
JED - Mass COA Cha		
JRC - Downward		
JRC - Lateral		
JRC - Return to Perm		



Action/Reason Caution !

When selecting specific Action/Reasons for reports other than “Transaction Reports”, proceed with caution. Alternatively, consider running your Action/Reason report request using the Transaction Report, which will collect transaction data from ALL data rows.

When running other reports like Earnings Distribution and Job Data, the data collection result will be affected by whether you choose “Include Historical/Future Data”. Selecting “All Action Reasons” is recommended for these reports unless there is a specific question you are attempting to answer.

- **Reports w/o selecting Historical/Future Data:**
Report will run against “current rows” only; the Action/Reason you are attempting to collect may not be the current row if another action has occurred.
For example: running a report for Action: Hire will fail to list a new employee who has a current row with another HRMS action that occurred since hire, a Data Change for example.
- **Report w/ selection “Include Historical/Future Data”:**
Report will run against ALL rows. For example, running a report for Action: Hire will list all employee Hire rows for the period selected.