HRMS BAIRS Reporting

Earnings Distribution Report
Parameter Page (Dashboard) Demonstration
Dashboard opens with pre-set defaults
Use “Reset Defaults” bar to return to original defaults
PARAMETER ELEMENTS OF THE REPORT DASHBOARD:

**Date Options:**

<table>
<thead>
<tr>
<th>Date Options:</th>
<th>Effective Date</th>
<th>Entry Date</th>
<th>As Of Date</th>
<th>Include Historical/Future Data</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>01/11/2002</td>
<td>To: 01/15/2003</td>
<td>mm/dd/yyyy</td>
<td></td>
</tr>
</tbody>
</table>

Reference: [http://hrweb.berkeley.edu/hrms/hrbairs/prehrmsdata.htm](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:**

<table>
<thead>
<tr>
<th>Date Options:</th>
<th>Effective Date</th>
<th>Entry Date</th>
<th>As Of Date</th>
</tr>
</thead>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>01/11/2003</td>
<td></td>
<td>mm/dd/yyyy</td>
</tr>
</tbody>
</table>

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:

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.

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:

- **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.
  - **Add One** allows user to key enter Org Nodes
  - **List** allows users to pick Org Node Codes from a list:

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

- **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:
  - allows user to key enter Job Codes
  - 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:**

- **All Funds** will provide a report for all funds within a user’s security access.
- Allows the user to key enter Fund Codes
- Allows the user to pick Fund Codes from a list:
- Allows the user to enter a range of Fund Codes:

   ![Fund Code Selection](image)

**Org Codes:**

- 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:

   ![Org Code Selection](image)

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

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:

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:

- Allows users to build a value list from a list of Actions:

- Allows users to build a value list from Action/Reason Combinations:

**Caution!**
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.