Absence Management: Reports

Purpose: This document reviews the process for running frequently used Absence Management and Time and Labor reports.

If you do not have the role that you need in order to run reports, contact your Authorized Requestor. A completed list of Authorized Requestors is available on Eureka in the HR Security category (http://eureka.harvard.edu).

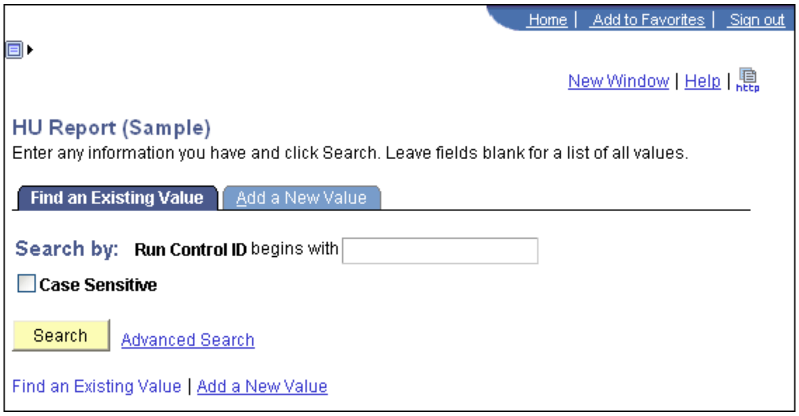
Topics Covered:

Key Terms and Definitions

Run Control ID	This is an ID that you create for running reports (e.g., Mary Jane Smith might create an ID of MJS). The Run Control ID is used every time you run a report. You may choose to create different run control IDs for different reports if you run the report with the same criteria every time. This will save you from having to enter the same parameters every time.
PSUNX	This is the server name always used for running reports.

Running a Report: Access the Report Page

Navigation: Access the Absence Management Report page by selecting the following path: Harvard Reports > Absence Management Reports > **(Report)**.

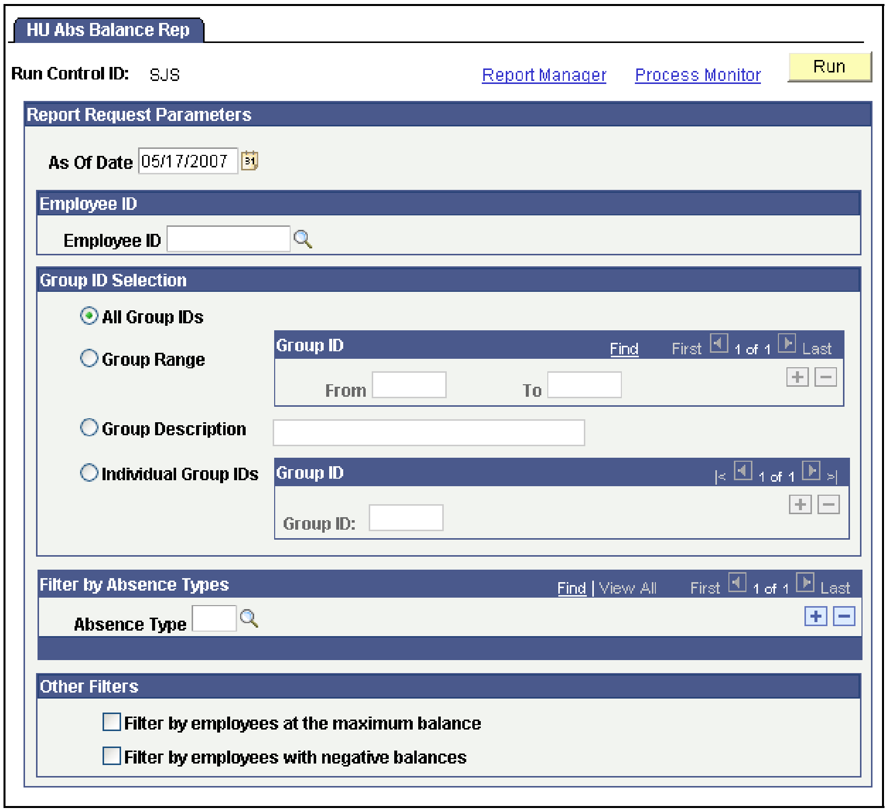


Page Summary: On this page, enter your Run Control ID to run a report, or create a new Run Control ID.

If . . .	Then . . .
You already have a Run Control ID.	1. Enter the Run Control ID 2. Click **Search** or hit the Enter key.
You do not have a Run Control ID.	1. Click the **Add a New Value** tab or link. 2. Enter your Run Control ID (you create the ID). 3. Click **Add** or hit the **Enter** key.

All documents and online simulations related to Absence Management are located in Eureka at http://eureka.harvard.edu.

Running a Report: Entering the Parameters



Page Summary: On this page, enter the parameters needed to run your report. Some Absence Management reports have additional parameters.

Tip: Only enter parameters that will helpfully restrict your report. For example, if you want the report to return all of the groups you have access to, leave the Group ID Selection parameters blank.

Parameter	Description
As of Date	Enter the Date in MM/DD/YYYY form, or click to select a date.
Group ID Selection (select one)	All Group IDs: Click to select all Group IDs within your security setup. Group Range: Click the radio button to enter the numeric range of Group IDs. Group Description: Click the radio button to enter the description of the Group ID. Groups: Click the radio button to manually enter a list of Group IDs: 1. Enter the first Group ID. 2. Click to add a new row, and enter the next Group ID. 3. Click to delete any rows.
Absence Type	Enter the Absence Type or click to select a code. If needed: 1. Click to add a new row, and enter the next Time Reporting Code. 2. Click to delete any rows.

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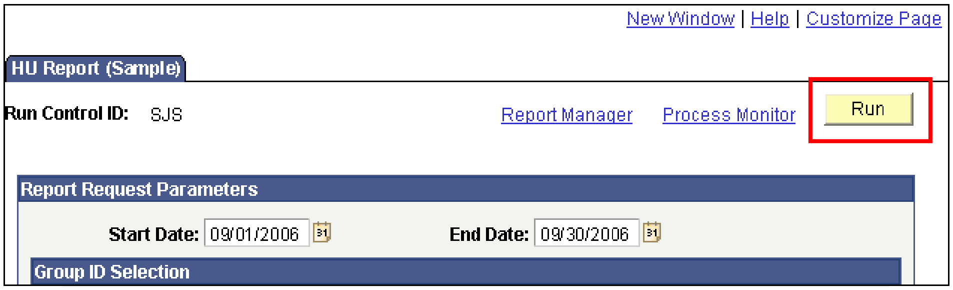
Parameter	Description
Employee ID	Enter the Employee ID or click to select a code. If needed: 1. Click to add a new row, and enter the next Employee ID. 2. Click to delete any rows.
Absence Status	Enter the Absence or click to select a code. If needed: 1. Click to add a new row, and enter the next Employee Class. 2. Click to delete any rows.
FLSA Status	Enter the FLSA Status or click to select a code. If needed: 1. Click to add a new row, and enter the next Employee Class. 2. Click to delete any rows. **Tip:** The code **N** is for an OT-Eligible (Non-Exempt) employee; **X** is for an Exempt employee.
Other Filters/ Checkboxes	Select the checkbox, if using: Example: Filter by employees with negative balances

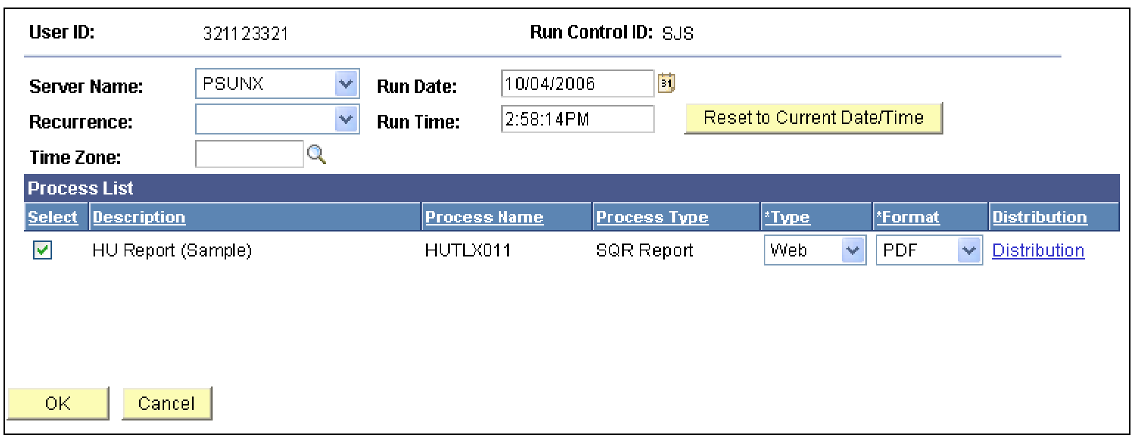
Running a Report: Running and Viewing the Report

After you have completed your parameters, follow these steps to run and view your report:

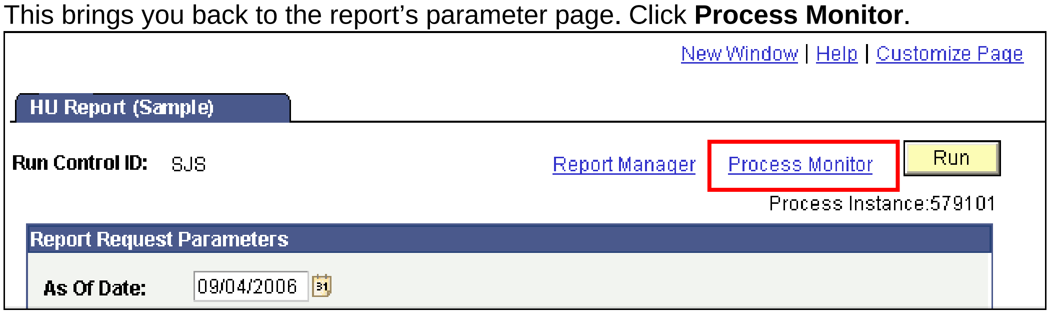
1. Click **Run**



2. This will automatically bring you to the Process Scheduler Request page:
   A. Set the **Server Name** to "PSUNX."
   B. Set the **Type** to "Web" and the **Format** to "PDF" (you may also set the Format to "CSV" if you wish to also view the output in MS Excel as a CSV file.)
   C. Click the **OK** button.



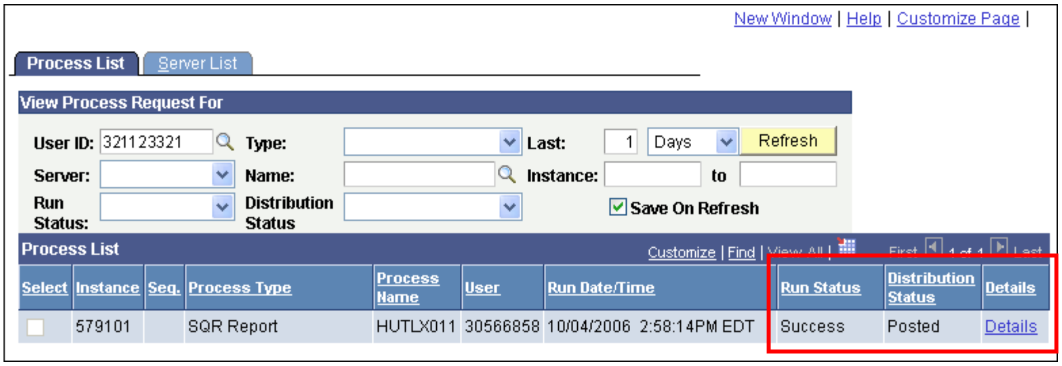
3. This brings you back to the report's parameter page. Click **Process Monitor**.



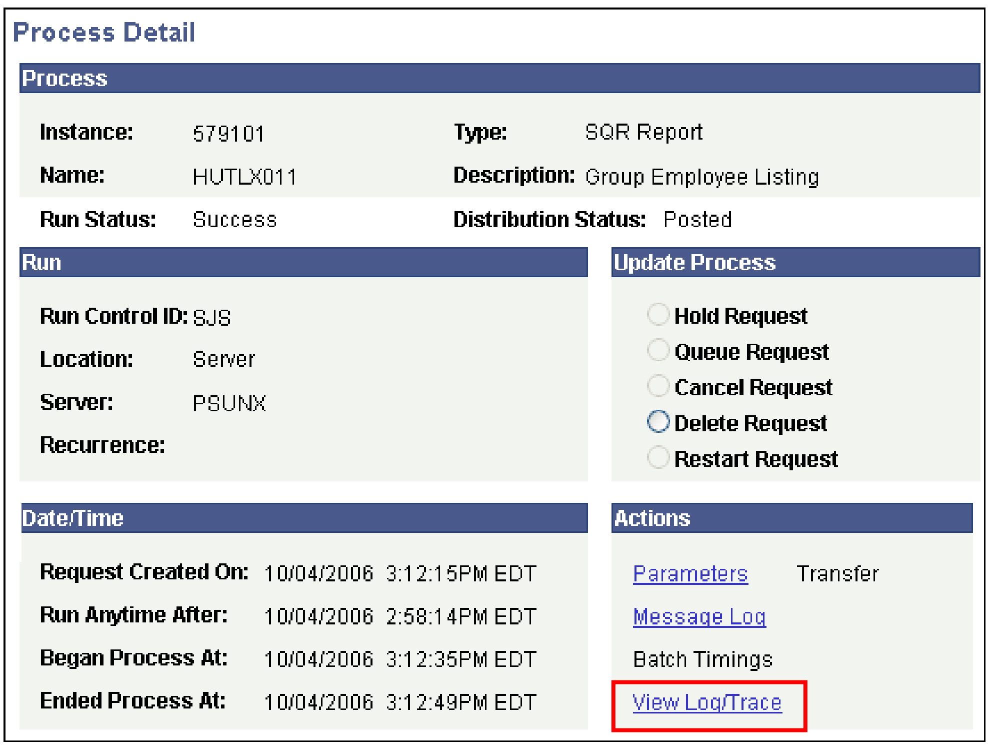
Note that a Process Instance number now appears under the "Run" button. Every time a report is run, it creates a unique process instance.

On the Process Monitor page:

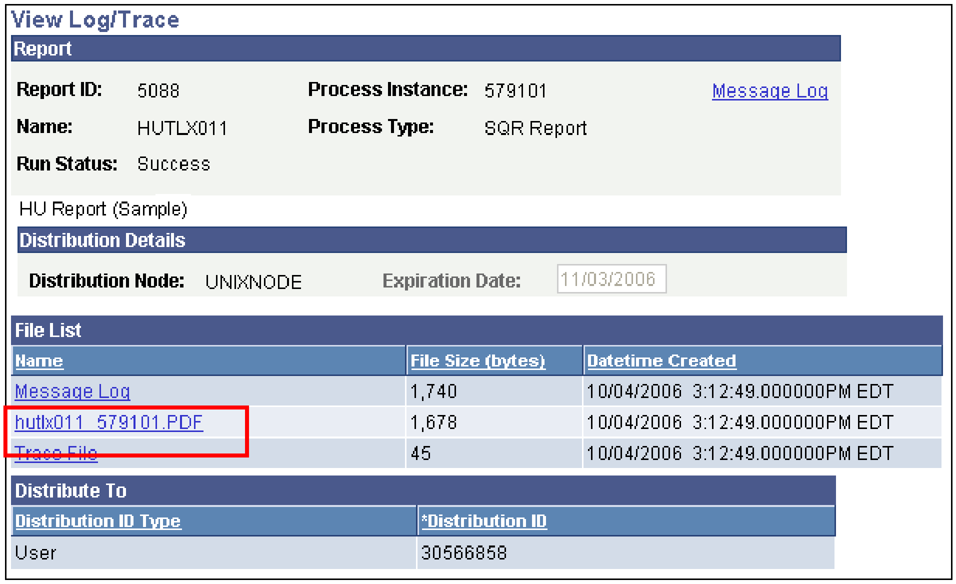
A. Click the **Refresh** button until the **Run Status** field indicates "Success," and the **Distribution Status** field indicates "Posted."
B. Click the **Details** link.



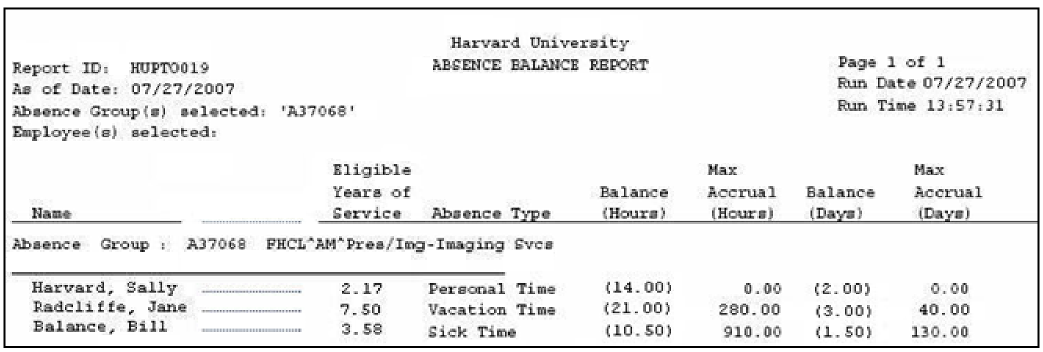
4. This brings you to the Process Detail page. Click **View Log/Trace**.



5. Almost done! To view the report, click the link that reads, "**hutlx…PDF or CSV**"



6. The report will open in a new window as a PDF file, or in MS Excel:



Summary

1. *Search page:* Enter your Run Control ID or click the "Add a New Value" link or tab.
2. *Parameter page*: Enter your parameters, and click "Run."
3. *Process Scheduler page*:
   a. Set the server name to "PSUNX."
   b. Set the Type to "Web" and the Format to "PDF."
   c. Click OK. *(You are automatically brought back to the Parameter page.)*
4. *Parameter page*: Click "Process Monitor."
5. *Process Monitor page*:
   a. Click "Refresh" until the Run Status is "Success."
   b. Click "Details."
6. *Process Details page*: Click "View Log/Trace"
7. *View Log/Trace page*: Click "hutlx…[PDF/CSV]" to view the report.

All documents and online simulations related to Absence Management are located in Eureka at http://eureka.harvard.edu.

Absence Management Reports Summary

- ❖ Reports shaded in yellow should be run on a weekly basis on the day specified.

Report Name	Description	Use to…	When to run…
Current Schedule Report	Lists employees and their current schedule.	1. Produce a reference list of employee schedules within a group 2. Identify discrepancies between scheduled and standard hours.	Any day
Absence Manager Report	Lists the individuals who hold the roles of Approver, Adjuster, Administrator and Keeper for a given Absence group(s).	1. Identify back-up Approvers, Adjusters, Administrators, and Keepers for a particular group. 2. Validate the security set-up.	Any day
Employees by Absence Group Report	Lists people who are assigned to a specific group(s).	1. Produce a reference list of employees within a group. 2. Identify groups that have no employees. 3. Monitor and validate group set-up.	Any day
Absence Balance Report	Enables Approvers, Adjusters, and Administrators to view absence balances for all employees in their group(s).	1. Produce a list of all balances for selected employee(s). 2. Identify employees who have a negative balance. 3. Identify employees who are at their maximum accrual balance.	Any day During the month of December, departments should run to identify any employees that have negative personal time.

Report Name	Description	Use to…	When to run…
Absences (Historical & Planned) Report	Lists absence events by: o Absence Type o Absence Group o Absence Status Or lists employees who have no absences planned within the selected date range.	1. Identify pending Absence Requests requiring approval. 2. Identify employees who have no Absence Requests over a long period of time.	**Friday** (after the Absence Approver deadline for the tub/department [usually after 12:00 PM])
Exempt Absence Entry Audit Report	Lists exempt employees who have entered an Absence Request for something other that a half-day or full-day.	Adjust exempt balances that were entered and processed in something other than half-day increments.	Monthly basis
Job Data Audit Report	Lists employees with JOB actions of Terminated (TER), Transfer (XFR), Rehire (REH), or Retired (RET).	Identify employees requiring balance adjustments (balances need to be zeroed out).	Any day
Historical Accrual Balance Report	Lists employees' historical balances (balances prior to July 1, 2007 that are financial obligations of the tub where the employee was employed.	Identifies employee's that require historical funding or those that have already been funded.	Any day
Balance Adjustment Report	Lists any employee that had a balance adjustment for the specified period of the report	Run to verify employees' balance adjustment discrepancies	Any day
Absence Balance Summary Report	Lists data similar to the Absence Balance Detail page. Using a start date and end date, departments can view a summary of their employees' takes, accruals and balance adjustments broken out by absence type.	This report can be used in conjunction with the Absence Balance Detail page in researching balance discrepancies.	Any day
Vacation Accrued vs. Taken Report	Displays the percentage (amount taken/amount earned) of vacation time an employee has taken for a specified period of time.	Running this report (as a CSV file) from the start of the fiscal year to the current day allows departments to filter on employees who are accruing time, but not taking time off.	Quarterly to ensure employees are taking time off.

Time and Labor Reports

- Reports shaded in yellow should be run on a weekly basis on the day specified.

Navigation: Access the Time and Labor Report page by selecting the following path: Time and Labor > Reports> > (**Report**).

Report Name	Description	Use to…	When to Run …
HU Group Managers Report	Returns all employees with the role of Time Approver, Time Keeper, or Time Adjuster for the selected Group ID(s).	1. Identify back-up Approvers, Adjusters, Administrators, and Keepers for a particular group. 2. Validate the security set-up.	Any day
HU Group Employee Listing	Returns all Time Reporters for the selected Group ID(s).	1. Produce a reference list of employees within a group. 2. Identify groups that have no employees. 3. Monitor and validate group set-up.	Any day
HU Unsubmitted Time Report	Returns any employees who have not yet entered their time.	Identify employees who have not entered their time so they can be contacted and reminded.	Friday, Monday
HU Approved / Unapproved Time Report	Returns each payable status for the selected Group ID(s), by employee count.	View total by payable status by group.	Monday, Tuesday (before 12:00 p.m.)
HU Payable Status Report	Returns the payable status, time type, and amount per day for each employee in the Group ID(s) selected.	Identify the payable time types for each employee and its status (approved, needs approval, etc)	Monday, Tuesday (before 12:00 p.m.)
HU TL Audit Report	Lists any changes made to employees' timesheet in the selected Group ID(s). Includes the Operator ID and name of the person who made the change.	Identify who entered the employee's time (employee, or adjuster, etc.).	Any day
HU Override Rates Report	Lists any override rates for employees within the selected Group ID(s).	Identity any employees receiving an override rate for the specified period of the report.	Any day
HU Payable Time History Report	Use to track sick time, vacation, etc.	Research reporting discrepancies; identify ZPTO rows that need to be corrected, etc.	Any day
HU Prior Period Adjustment Rpt	Returns any prior period adjustments that appear on the Payable Time page.	Research prior period adjustments that have not been approved and require approval on the Payable Time page.	Monday, Tuesday (before 12:00 p.m.)

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Report Name	Description	Use to…	When to Run …
HU TL Possible Overpayment Rpt	Returns employees whose payable time is greater than their scheduled hours for the week.	Indentify employees that have reported an absence and regular hours beyond their scheduled hours on the same day	Monday
HU TL Possible Underpay Report	Returns employees whose payable time is less than their scheduled hours for the week.	Indentify employees that have under reported their hours – most likely because they expected an absence to come over from Absence Management.	Monday
Cost Center Register by EE	Use to verify that the payroll is correct for each department.		Tuesday (prior to final Payroll confirmation) Wednesday (to see final costing)