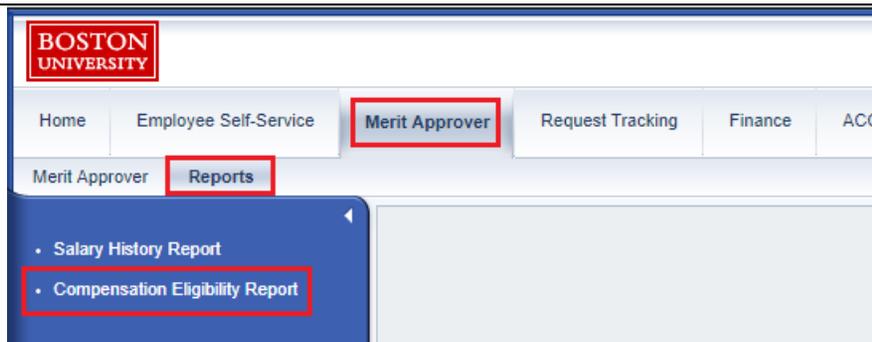




How to run the ECM Eligibility Report

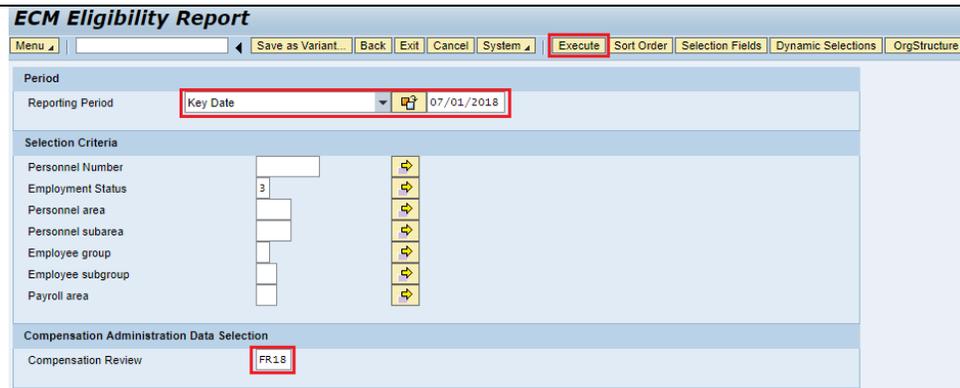
Prior to, and during, the merit review process, ECM recommenders and approvers must review the eligibility list of employees in their planning org units. It is imperative that if an employee needs to have their status updated to eligible or not eligible that you contact your compensation analyst as soon as possible so the employee can be removed or added to the ECM process and worksheets. The addition or removal process can take up to a full business day once your analyst is notified.

The instructions below will show an ECM recommender or approver how to load and run the ECM Eligibility Report. If you have any questions on this or any other ECM process please contact hrcomp@bu.edu



How to load the ECM Eligibility Report:

1. Log on to **BUworks Central**: www.bu.edu/buworkscentral
2. Depending on your access, click the **Merit Approver** or **Merit Recommender** tab (in this example, the Merit Approver Tab is displayed)
3. Click on **Reports**, then **Compensation Eligibility Report**
4. The **ECM Eligibility Report** will load in the main window



How to run the ECM Eligibility Report:

1. **Reporting Period** select **Key Date** and enter 07/01/2018
2. **Compensation Review** select: **Faculty Review 2018** or enter **FR18**
3. Click **Execute** to run the report for all the orgs you are responsible for, if you want to narrow down the org units you are running the report for follow the instructions below

How to run the ECM Eligibility Report

ECM Eligibility Report

Menu | Save as Variant... | Back | Exit | Cancel | System | Execute | Sort Order | Selection Fields | Dynamic Selections | **OrgStructure**

Period
Reporting Period: **Key Date** 07/01/2018

Selection Criteria

Personnel Number:
 Employment Status: 3
 Personnel area:
 Personnel subarea:
 Employee group:
 Employee subgroup:
 Payroll area:

Compensation Administration Data Selection
 Compensation Review: **FR18**

Choose Organizational unit

Name	ID	Code	Valid t
<input type="checkbox"/> Dean's Office	O 10005219	Dean's Offic	05/24
<input type="checkbox"/> Strategic Initiatives	O 10005584	STRAT INIT	10/10
▶ <input type="checkbox"/> Administration - CAS	O 10003402	020040	01/01
▶ <input type="checkbox"/> African American Studies	O 10000692	020229	01/01
▼ <input checked="" type="checkbox"/> Anthropology	O 10001762	046340A	01/01
<input checked="" type="checkbox"/> Anthropology	O 10001522	Anthropology	01/01
<input checked="" type="checkbox"/> Anthropology	O 10001523	Anthropology	01/01
<input checked="" type="checkbox"/> Anthropology	O 10004186	Anthropology	05/23
<input checked="" type="checkbox"/> Anthropology	O 10005803	ANTHRO 4	03/30
▶ <input type="checkbox"/> Archaeology	O 10000232	020231	01/01
▶ <input checked="" type="checkbox"/> Astronomy	O 10000013	020201	01/01
▶ <input type="checkbox"/> Biology	O 10001376	020202D	01/01
<input type="checkbox"/> Center for East Asian Archaeology	O 10001528	020233	01/01
▶ <input type="checkbox"/> Center for Jewish Studies	O 10000078	Jewish Study	01/01
▶ <input type="checkbox"/> Chemistry	O 10000180	020205	01/01
▶ <input type="checkbox"/> Classical Studies	O 10000687	020204	01/01
▶ <input type="checkbox"/> CompNet	O 10000016	CompNet	01/01

Navigation icons:     

How to run the ECM Eligibility Report for certain Org Units:

1. For **Reporting Period** select **Key Date** and enter 07/01/2018
2. For **Compensation Review** select: **Faculty Review 2018** or enter **FR18**
3. Click the **Org Structure** button at the top of the screen
4. Use the **Choose Organizational Unit** screen to navigate the hierarchy to the orgs you want to view eligibility for and check the box next to the org name, if you want to also select any sub units that report to the selected org you can expand and check off each sub org or you can click/highlight the parent org and click "**Select Subtree**": 
5. Once all your org units are selected click the **Continue** button: 
6. When you return to the main selection screen click **Execute**

How to run the ECM Eligibility Report

ECM Eligibility Report

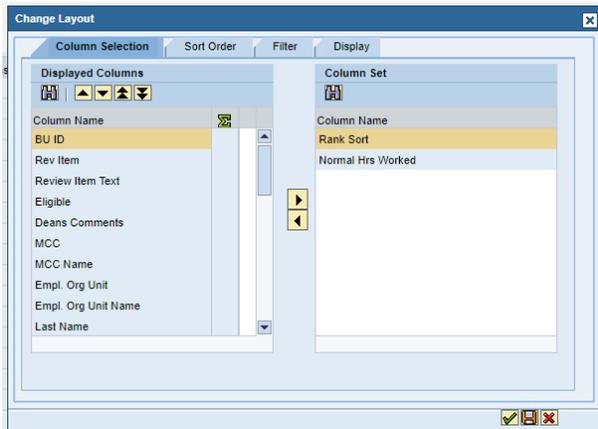
Menu | Back | Exit | Cancel | System | Details | Sort in Ascending Order | Sort in descending order | Set filter | Total | Print preview | Local file... | Mail Recipient | ABC Analysis | Graphic

Eligible / Ineligible Report
As of selection date: 07/01/2018

BU ID	Rev Item	Review Item Text	Eligible	Deans Comments	MCC	MCC Name	Empl. Org Unit	Empl. Org Unit Name	Last Name	First Name
U9999999	FR18	Faculty Review 2018	Yes	No	1262070000	COMPUTER SCIENCE	10000097	Computer Science	JOANN	BARBARA
U9999991	FR18	Faculty Review 2018	Yes	No	1262070000	COMPUTER SCIENCE	10000097	Computer Science	BARBARA	JOANN

Rank	Tenure Status	Annual Salary	Base Rate Amount	Position No	Position Title	Job	Grade	Tenure Eff Date	High Degree Year	Hire Date	Assign. Duration
ASCP	Non Tenure Track-NTT	200,100.00	200,100.00	50000000	Associate Professor	Associate Professor	FACULT		1989	09/01/1994	9 Month - 39 Weeks
ASCP	Non Tenure Track-NTT	200,200.00	200,200.00	50000002	ASCP	Associate Professor	FACULT		2018	09/01/1989	9 Month - 39 Weeks

Percent Time	Empl. Status	Leave Status	Leave Reason	Leave Start Date	Pers. Area	Pers. Sub Area	Empl. Group	Empl. Sub Group	Pemr
100	Active				Charles River Campus	NREP Faculty	Faculty Full-Time	FY-Accrual 9/12	19999
100	Active	Paid LOA	Sabbatical, Full Pay	01/01/2014	Charles River Campus	NREP Faculty	Faculty Full-Time	FY-Accrual 9/12	99999



Columns on the ECM Eligibility Report:

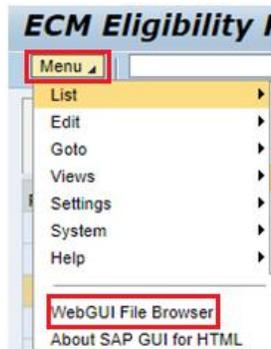
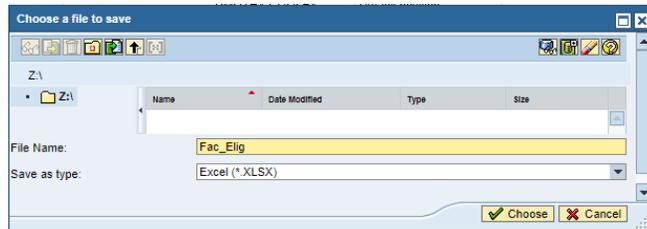
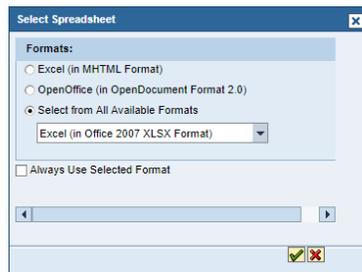
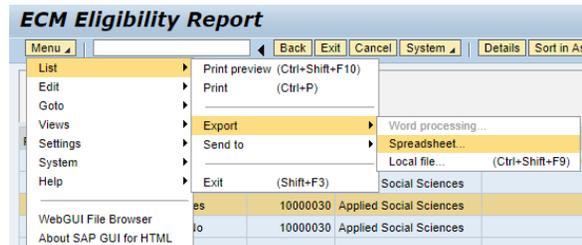
The report will provide points of ECM and demographic information such as:

- Review Item/Review Item Text
- Eligibility
- Deans Comments (not worksheet comments, but uploaded Deans comments)
- Master Cost Center
- Org Unit
- Last, First Name
- Rank
- Tenure Status
- Tenure Effective Date
- High(est) Degree Year
- Annual Salary, prior to current review cycle
- Base Rate
- Position # and Title
- Job
- Salary Grade
- Hire Date
- Assignment Duration and Percent Time
- Employment Status
- Leave Status, Reason and Start Date (LOA, if applicable)
- Personnel Area and Personnel Sub Area
- Employee Group and Employee Subgroup
- Pernr and BUID

The order of the columns can be updated by changing your layout, in order to change select the following:

1. Click **Change layout...** along the top of the report.
2. When the **Change Layout** screen loads you can click/highlight the data point you want to move and use the up/down arrows to change the location of the column.
3. Once you are happy with your column order click the **Green Check:** 

How to run the ECM Eligibility Report



How to Export the Eligibility Report:

1. After the report runs, to export, click on **Menu -> List -> Export -> Spreadsheet**
2. Select **Excel (in Office 2007 XLSX Format)**, then click the green check **Continue** button:
3. In the **Choose a file to save** window name your file and then click the green check **Continue/Choose** button: and click OK on the following popup. After clicking OK a popup window should appear with the downloaded file to open. Double click on the Excel icon, the file will then open and you can edit/save as you wish.
4. If the pop-up does not appear you can find/download the file by clicking the **Menu** button and selecting **WebGUI File Browser**, when the following screen loads double click the file you want to download. The browser will then download the file and you can open it by clicking the Excel icon.