

Introduction

Process and Trigger

Use the PA9001 report to verify specific faculty data such as which full-time faculty members have a contract end date approaching and need to be renewed, or which faculty members will be reviewed for tenure in a given year. In addition, the report can be used for general data verification to determine if information is missing or outdated.

Access to this report is limited to Faculty Action Managers

Prerequisites

None

Menu Path

BUworks Central portal → Reporting → Human Capital Management (HCM) → Faculty Data → Faculty Audit PA9001 Report

Transaction

- [Introduction to BW Reporting at Boston University](#) (video)
- [Working with BW Reporting](#) (video)

Tips and Tricks

- This report is useful for viewing all appointments for an individual faculty member. Depending upon your data needs, you may find it preferable to view individuals rather than entire departments or schools/colleges.
- Common uses for the report include examination of contract information, paid and unpaid leaves of absence, tenure status and tenure review.
- The reference document [Faculty Appointments in SAP](#) is useful for field definitions and requirements related to faculty appointments.
- There may be times when you want to determine counts of employees, e.g., count the number of full-time faculty or lecturers in a school or department. This report contains one Key Figure, **Number of Records**, that is hidden in the initial layout. You can develop a count by “un-hiding” the Key Figure and adding a subtotal to the report. Information about showing / hiding Key Figures is contained in the Help document [BW How to - Hide or Show a Key Figure](#).
- This report was developed as an auditing tool to assist you in managing the data on your faculty employees. The report:
 - Allows the comparison of all position titles (short/medium/long) to jobs, organizational units and master cost centers
 - Gives you a quick reference as a way to identify missing or inaccurate data, e.g., fields like Position/Rank Effective Date, Initial Academic Appt Date, Appointment Level, and Appointment Type should never be blank. Refer to the Help Guide [Faculty Appointments in SAP](#) for a complete description of data requirements.
 - Can be utilized to capture upcoming contract expirations, paid and unpaid leaves of absence, tenure status and tenure review to ensure that all are accurate and up to date.
- The report contains many Characteristics (data fields). To avoid spending too much time searching for a particular Characteristic, you may want to use your browser's **Find** function. Hold the CTRL key down and press the “F” key. This keyboard shortcut opens the **Find** input box, into which you can type some or all of the Characteristic you are looking for. Then press the Enter / Return key to execute the function.

How-to guides useful when executing a BW report

- [BW How to Run - Award Activity – Sponsored Program \(Distributed\) report](#)
- [BW How to - Use the Matchcode or Search Box](#)
- [How to - Specify Report Dates](#)
- [How to Save and Use a View](#)
- [How to Filter Report Data](#)
- [How to Add a Result-Subtotal Line](#)
- [How to Export BW Report Data to Excel](#)
- [How to Save and Use a Variant](#)

Procedure

Executing the Report

Enter selection criteria via the displayed *Variable Entry* screen (optional)

General Variables	
Variable	Current Selection
Employee	<input type="text"/> 
BU ID	<input type="text"/> 
Last Name (Upper Case)	<input type="text"/> 
First Name (Upper Case)	<input type="text"/> 
School / College	<input type="text"/> 
Organizational Unit(Hierarchy Node)	<input type="text"/> 

This report does not have any required variables. If nothing is entered when running the report, data returned will be restricted to the permissions of the person running the report.

Alternatively, variable values can be entered to narrow the data returned:

Variable Definitions

Employee: the SAP Personnel Number (PERNR) of an individual faculty member. If you don't know the PERNR of the employee you wish to view, use the search function available by clicking on the small white matchcode box to the right of the **Employee** text box.¹



Some faculty members have more than one PERNR due to their having multiple assignments, e.g., professor *and* department chairman. Be sure you specify the correct number of PERNRs when using the **Employee** field to specify an individual.

BU ID: use this variable to identify one or more personnel by specifying their BU identification numbers

Last Name: the last name (in upper case) of the faculty member you wish to examine. Recommended: use the matchcode box to search for and select the last name of the individual you seek.¹

¹ Refer to the Help document [BW How to - Use the Matchcode or Search Box](#) for a detailed description of using a matchcode box.

First Name: the faculty member's first name (upper case). In cases for which the last name is unique, entering first name is not necessary.

School/College: for faculty action coordinators with access to more than one school/college, entering a value in this field will limit data returned to that unit (or units). Note: values used to indicate schools/colleges are not intuitive. Use the matchcode box to search for and select one or more schools/colleges.

Organizational Unit: unit of an enterprise that has the potential to be managed, such as department, group, subgroup, or project.

Characteristic Definitions

Characteristics	Description
Active Status	If the faculty employee is within his/her contract appointment agreement and is not terminated or retired from the university, then 'Active' should be selected/displayed
Affiliate	The name of the institute with which the employee has an affiliation
Appointment Level	Identifies the primary or secondary appointment.
Appointment Type	Identifies whether an appointment is academic or administrative
Assignment Duration	The months/weeks an employee is scheduled to work
BU ID	Specifies a unique alphanumeric key that identifies a person in the SAP system. Also known as External Person ID. For concurrently employed persons, several personnel assignments are assigned to an external person ID. Note: this is the BUID assigned through the ID System
Changed by	Who or what (if a system function performed the change) made the last update to a record. The field will contain either a person's SAP ID, form, conversion or upload
Changed On Date	Date of last change to employee record
Contract End Date	Date through which the contract is effective
Contract Start Date	Start date of the Contract
Contract Type	Correlates to 'Covered By' for the type of contract
Coterminous	Indicator that the secondary appointment is coterminous with the primary appointment. All FPP appointments (primary and secondary) are coterminous with their employment at BU
Covered By Code	This determines the track and the contract type under which faculty are governed
Decision	Identifies the outcome of an appointment decision
Decision Date	Date of the final approval for an appointment or status change
Employee Group	Identifies how employees are grouped based on similarities/differences in time, pay and/or benefits. Part of the Enterprise Structure
Employee Subgroup	Subdivisions of the Employee Groups which further define employee similarities / differences in time, pay and / or benefits. Part of the Enterprise Structure
First Name	First name of faculty member being examined
Full Time Hire Date	Date that the employee became full time faculty member. This should not be blanked out if employee goes from FT to PT
Initial Academic Appt Date	The date of an individual's first approved faculty appointment at BU

Characteristics	Description
Job	Job is a type of object managed in SAP HCM Organizational Management module and is assigned to a position. Job classifies positions and allows standardized attributes to inherit to the position, such as qualifications, descriptions, US job attribute codes, and planned compensation. The validity date of each attribute defines whether data is current, historical or future
Joint	Indicates whether an the employee has a 'true' joint academic faculty appointment with 50/50 split for both pay and responsibilities divided equally between two units, and is agreed upon prior to the hire
Last Name	Last name of faculty member being examined
Long Position Extension	This field typically contains no data. For position descriptions longer than 60 characters, however, this Characteristic contains the text that would not fit in the Position Text field
Long Position Text	Is known as the "business card" title. It is the full approved title of the appointment which combines the Position Medium Text with the School/College/Unit and sometimes the sub-unit of the department
Mail Code	For Faculty and Staff, the mail code is used by mail services for internal deliveries. It is unofficially used to identify the department, when, for example, students are paid from work study
Main Indicator	An indicator of "X" indicates that this position is the main assignment for the employee. This is important to use for faculty selections, to eliminate duplicate employees' counts. All salary and budget information should be connected to this assignment/position
Major Affiliate Flag	Indicates if the faculty has an affiliation at an outside institution
Master Cost Center	Master Cost Center is the finance cost object that is maintained on the position and syncs to the employee from the position. It is required for successful payroll processing and is used to pay the employee if there is an error with pay distribution (Infotype 0027). It represents the department associated with an employee's position
Medium Position Text	Is the rank name [ex: Professor, Research Associate Professor]
Middle Name	Middle name of faculty member being examined
PA9001 - End Date	End date of the IT9001 record
PA9001 - Start Date	Start date of the IT9001 record
Percent Time	The percentage of time an employee works. This is populated from the first three characters of Employment Percent (for example, 050.9% would display 50)
PERNR	SAP personnel number; an authorization object that is used to assign users different authorizations
Personnel Area	The Personnel Area is the first grouping in the enterprise structure. For Boston University, it represents the various campuses and limited affiliates. Once defined for a position (IT1008) /employee (IT0001) - the personnel area is used to filter fields such as personnel sub-areas and building list available for the primary work address
Personnel Subarea	The Personnel Subarea is the second grouping in the enterprise structure. For Boston University, it defines whether a position (IT1008)/employee (IT0001) is represented or non-represented by a union. Personnel subarea options are dependent on the personnel area selected and drive which employee groups are available, work schedules/quotas are allowed, and affect benefit program grouping
Position Rank Effective Date	The date the rank became effective.
Retired with Emeritus	For faculty who retired with the Emeritus distinction, this flag is set to indicate that he/she has emeritus status. It is important to note that some faculty return to teach part-time with the Emeritus rank.
Short Position Text	Is usually the same as the Job Short Text; however, in some cases it is varied and needed to either group or distinguish between "Job Short Texts".

Characteristics	Description
Tenure Date	This is the full date on which the faculty employee obtained tenure. Faculty employees who have this filled in must be on a "Covered By" of "Tenure". Note: This is only valid on the Charles River Campus as there is no tenure on the BU Medical Campus. The format of the date is: mm/dd/yyyy; Ex: 01/01/2013
Tenure Review Year	This is the year during which the employee is due for their tenure review. Faculty employees who have this filled in must be on a "Covered By" of "Tenure Track". [Ex: "2013"]

Free Characteristics	Description
College/School	The name of the school or college of the faculty member(s) under examination
Employment Status	Employment Status indicator describes the status of the employee at BU- associated with actions
Leave Pay Status	This field indicates what type of leave of absence the employee is on, or if they have most recently returned from LOA
Organizational Unit	Unit of an enterprise that has managerial potential, such as department, group, subgroup, or project

Results and Next Steps

None