

Introduction

Process and Trigger

This report provides a list of employee distributions that have expired or are scheduled to expire anytime during the two months following when the report is run. Note that this report runs against data in the transactional system and not the Business Warehouse. As a result, any changes made in the transactional system via Web GUI, for example, will be reflected in the report as soon as the report data is refreshed.

Prerequisites

None

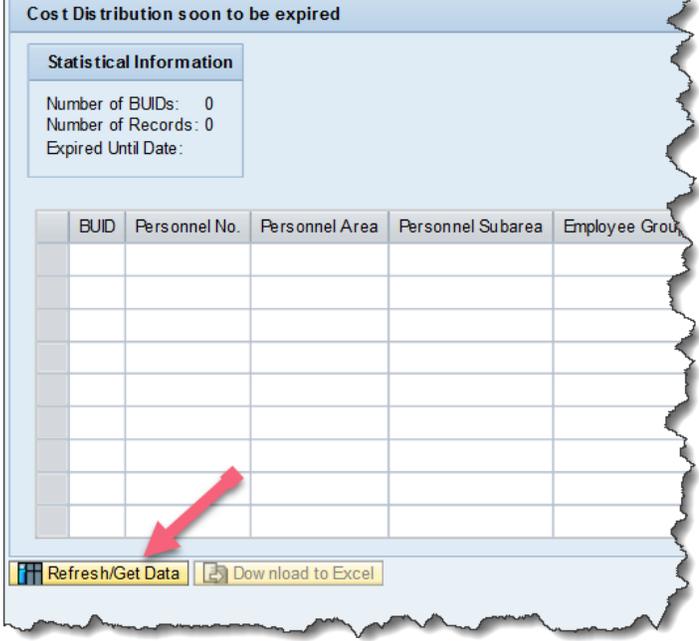
Menu Path

BUworks Central → Reporting → Human Capital Management (HCM) → Personnel Administration → Cost Distributions Soon to Expire

Tips and Tricks

- All distributions will be listed for any employee with at least one expiring distribution, including those distributions not expiring.
- The number of distributions listed will typically be larger than Number of BUIDs since some employees have multiple distributions (not all of which may be expiring).
- Data returned will be limited by the organizational unit permissions of the person running the report
- While this report is accessible via the Business Warehouse portal, it is not a BW report. As a result, the BW operations that can normally be performed, things like filtering or adding a subtotal, are not available. However, operations to change the report layout are available and are described in the section **Modify the Report Layout** below.
- Sort report data by clicking on any of the column headers. Note, however, that sorting on the **Cost Distribution End Date** will result in separating records for each individual.

Procedure



The initial display contains no data.

Click the **Refresh/Get Data** button to load (or reload) report data.



Data returned will be limited by the organizational unit permissions of the person running the report.

Sample Output

Cost Distribution soon to be expired									
Statistical Information									
Number of BUIDs: 9									
Number of Records: 9									
Expired Until Date: 08/31/2017									
BUID	Personnel No.	Personnel Area	Personnel Subarea	Employee Group	Employee Subgroup	WSR	WSRText	Administrator	Emp/UA ppl Name
		Charles River Campus	NREP Faculty	Faculty Full-Time	FY -Accrual 9/12	F08MO1N1	8 hour 5 day		
		Charles River Campus	NREP-Staff	Staff-Exempt PT	AcadRsrch-EE	P24FLEXC	8 Hour Flex Schedule		
		Charles River Campus	NREP Faculty	Faculty Full-Time	Faculty	F08MO1N1	8 hour 5 day		
		Charles River Campus	NREP-Staff	Staff-Exempt FT	AcadRsrch-EE	F08MO1N1	8 hour 5 day		
		Charles River Campus	NREP-Staff	Staff-Exempt FT	AcadRsrch-EE	F08MO1N1	8 hour 5 day		
		Charles River Campus	NREP-Staff	Staff-NonExempt PT	Temporary Employee	C24FLEXC	8 Hour Flex Schedule		
		Charles River Campus	NREP Faculty	Faculty Full-Time	FY -Accrual 9/12	F08MO1N1	8 hour 5 day		
		Charles River Campus	NREP Faculty	Faculty Full-Time	FY -Accrual 9/12	F08MO1N1	8 hour 5 day		

Last name	First name	Cost Center	Internal Order	WBS Element	CO/Order/WBS Text	Org Unit Short Text	Cost Distribution End Date	Percentage	Leave Pay Status	LOA Status Text	LOA Return Date
							06/30/2017	100.00			
							11/30/2016	100.00	0	Return from leave	
							05/31/2017	100.00			
							11/30/2016	73.44			
							11/30/2016	2.08			
							11/30/2016	24.48			
							09/04/2016	100.00			
							11/30/2016	41.67	0	Return from leave	
							08/31/2099	58.33	0	Return from leave	

The **Statistical Information** will show:

- The count of employees with at least one expiring distribution.
- The number of distributions listed. This number will typically be larger than *Number of BUIDs* since some employees have multiple distributions.
- The date through which expirations were examined.



All distributions will be listed for any employee with at least one expiring distribution, including those distributions not expiring.

Report Data

Field	Description
Cost Center / Internal Order / WBS Element	Cost elements against which distributions are made.
Cost Distribution End Date	Date on which a distribution will expire or has expired.
Percentage	Percentage of employee's salary charged to the cost element on each record.
LOA Status Text:	Leave of Absence description of status, such as paid, half-paid or unpaid.
Leave Pay Status	Numeric SAP code corresponding to LOA status.
WSR, WSR Text	The work schedule rule [WSR] details the employee's planned work schedule. It utilizes the period work schedule which indicates what days are worked and the number of hours per day.

Modify the Report Layout

While many users may prefer to export their report data to Excel (refer to the section **Export Report Data to Excel** below), a few operations can be performed while working within the report.

Sort Data within a Column

Click on the header of the column to be sorted.

Move a Column

There are two ways to move a column:

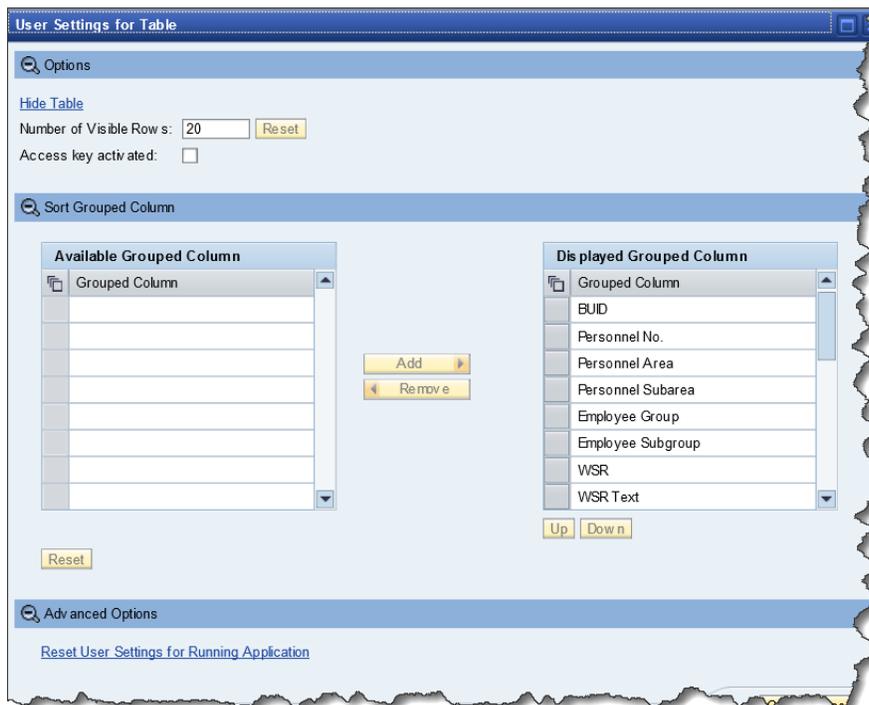
1. Click on the heading of the column to be moved. Hold the mouse button down and drag the column left or right to a new position.
2. Change *User Settings for Table*

Personnel Area	Personnel Subarea	Employee Group	Employee Subgroup	WSR
Charles River Campus	N			
Charles River Campus	N			
Charles River Campus	N			
Charles River Campus	NREPFaculty	Faculty Part-time	Faculty	F081

A. Right-click on *any* column heading.

B. Slide the cursor right (over User Settings)

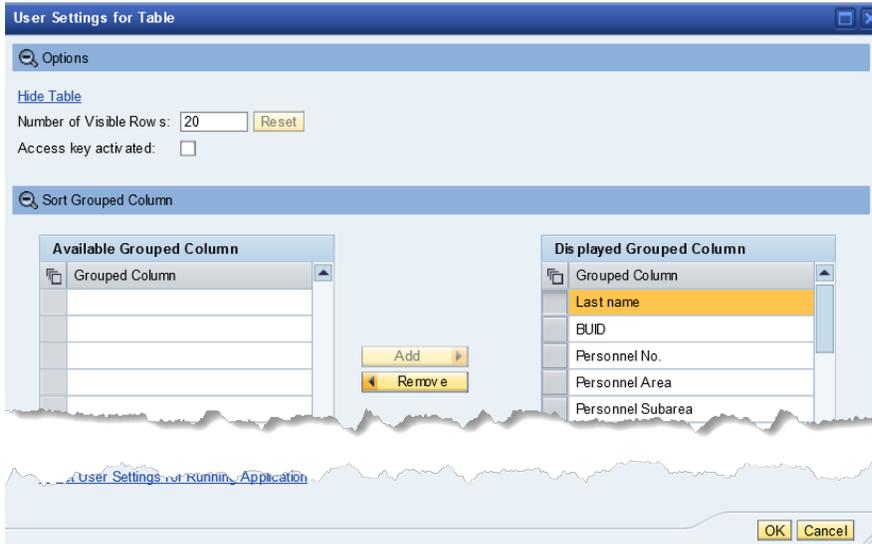
C. Click on *More*



A window like this is displayed.

Select the column to be moved

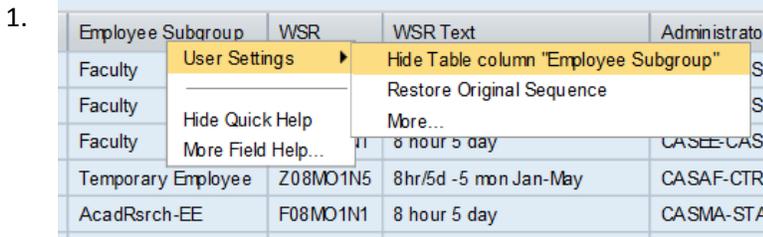
Use the **Up** or **Down** buttons to change the column's position



When the move is complete, press the OK button to apply the change

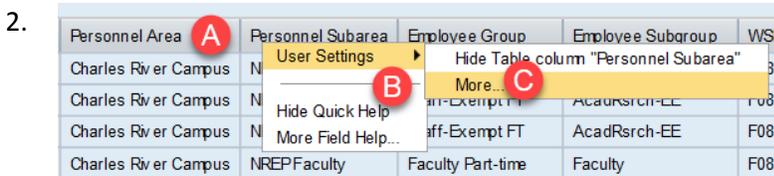
Remove a Column

As with moving a column, there are two methods one can use to remove a column:



Right-click on the heading of the column to be removed.

Slide your cursor to the right and click on *Hide Table column*



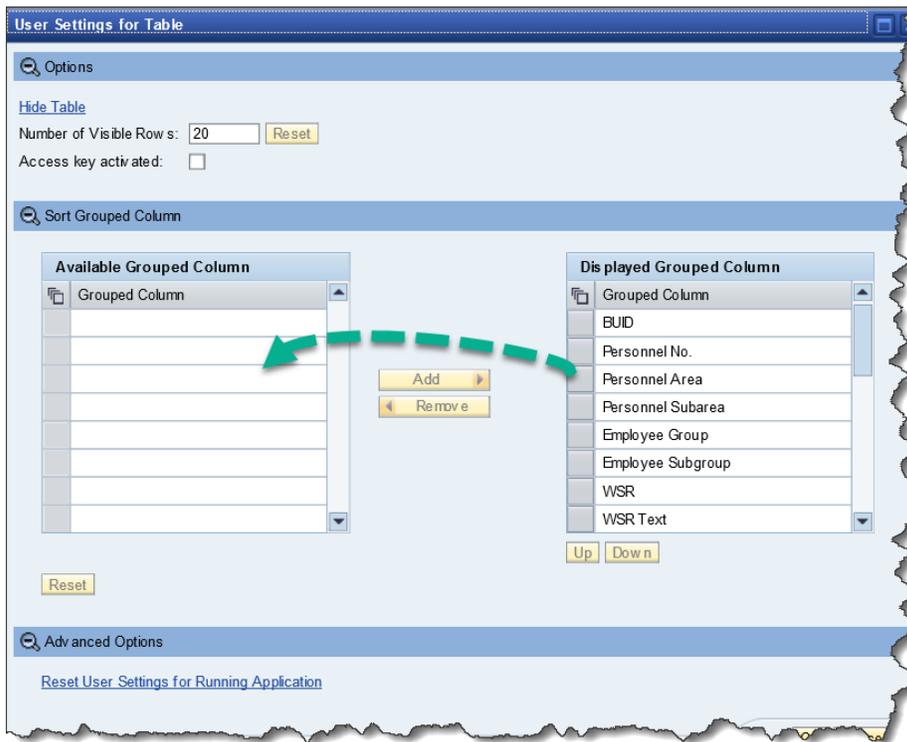
A. Right-click on *any* column heading.

B. Slide the cursor right (over User Settings)

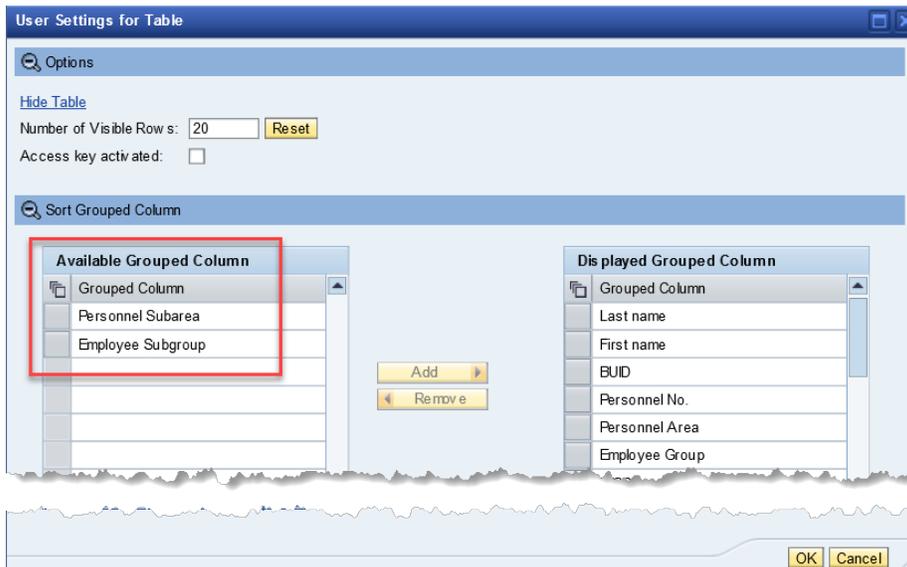
C. Click on *More*

Within the displayed window, select the column to be moved (note that only one column can be selected at a time).

Use the **Remove** button to move the column from the *Dis played Grouped Column* to the *Available Grouped Column*



When all columns to be moved are listed in the *Available Grouped Columns* pane, press the **OK** button to apply the change



Export Report Data to Excel (Optional)

To perform other operations such as filtering data or removing columns, it is necessary to first export the data to Excel by clicking the **Download to Excel** button (#2 below).

Cost Distribution soon to be expired

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Number of Records: 9									
Expired Until Date: 08/31/2017									

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		Charles River Campus	NREP- Faculty	Faculty Full-Time	FY-Accrual 9/12	F08MO1N1	8 hour 5 day		

1 Refresh/Get Data 2 Download to Excel

Results and Next Steps

None