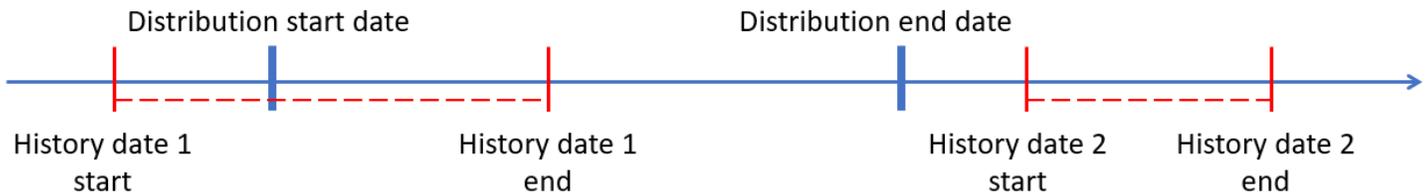


Introduction

Description

This report examines the distribution start and end dates for all employees in a selected population (controlled via Variables entered at run time and by the data access permissions of the person running the report). Each distribution is tested against a user-specified History date range. Employees with distribution start/end dates that includes any date within the range specified will be returned in the report, along with all the distributions for each employee.

The following figure demonstrates how an employee distribution would be examined based on two sample date ranges. *History date 1* would result in the selection of an employee with the distribution start/end dates shown. *History date 2* would not result in selection of this sample distribution because both the start and end dates fall outside the specified distribution range.



All cost distributions for each employee returned will be displayed, as will the source of each distribution and the start and end date for that distribution.

Menu Path

BUworks Central portal → Reporting → Human Capital Management (HCM) → Personnel Administration → Cost Distribution Report

Tips and Tricks

- The **History Range** variable will accept dates that specify a range or a single day (the single day must be specified as a range). For example, both 02/01/2022 – 03/31/2022 and 03/31/2022 – 03/31/2022 are valid.
- Once the report has run, you may want to add a subtotal by employee in order to separate employee distributions and to convince yourself that all distributions sum to 100%.

If required, the **Distribution End Date** can be filtered to view distributions ending within a selected period of time (during the next month, the next two months, etc.). This is demonstrated in the [Use Case Example ..](#)

- This report provides data similar to, but not identical with, that provided by the *Cost Distributions Soon to Expire* report. The following table outlines essential differences between the reports:

Feature	This report	Cost Distributions Soon to Expire
Date specification allowed	Yes	No [†]
Identifies expiring distributions	Yes*	Yes
Report output includes all employees in an organization by default	No	No
All distributions for an employee are displayed	Yes	Yes
Standard BW functionality (filtering, etc.) is available	Yes	No

Table 1

[†] The report identifies expiring distributions relative to the date on which the report is run.

* Requires user to apply a data filter. Refer to [Use Case Example](#)

Help Resources

The following resources may prove useful in understanding the data in this BW report:

Help Topic	Help Guide (PDF)	Video (Terrier eDev or Kaltura Mymedia) ¹
How to Filter Report Data	PDF	Terrier eDev or Mymedia
How to Add a Result-Subtotal Line	PDF	Terrier eDev or Mymedia
How to Save and Use a View	PDF	Terrier eDev or Mymedia

Table 2

Procedure

Click on the Portal link to start the report. Enter selection criteria via the *Variable Entry* screen.

General Variables		
Variable**	Current Selection	Description
History Range	06/30/2011 - 06/22/22 <input type="checkbox"/>	06/30/2011 - 06/22/2022
Employee	<input type="checkbox"/>	
BU ID	<input type="checkbox"/>	
Organizational Unit	<input type="checkbox"/>	
Master Cost Center	<input type="checkbox"/>	
Employment Status	3 <input type="checkbox"/>	3 Active
Personnel Area(s)	<input type="checkbox"/>	
Personnel Sub-Area(s)	<input type="checkbox"/>	
Employee Group(s)	<input type="checkbox"/>	
Employee Subgroup	<input type="checkbox"/>	
Main Assignment Ind (X)	X <input type="checkbox"/>	X

History Range selects employee data as of the dates specified. This field is initially populated with a date range that includes all distributions for selected employees. This date can be edited.

The report filters **Employment Status** to show only active employees in the initial view. Change this selector in the Variable Entry screen in order to view other status values.

If **Main Assignment Indicator** = X, only records associated with the main assignment will be selected.

¹ The Terrier eDevelopment and Kaltura Mymedia streaming servers provide access to a variety of video materials. As of this writing, the eDev environment is not available to temporary employees due to licensing restrictions

Report Output – Initial View

Characteristics and Key Figures available in the initial layout include these fields:

Emp Name (LAST, FIRST M) ▲	BU ID ▲	Emp Main Pernr ▲	Employee Group ▲	Cost Center ▲	Order ▲	D
			Faculty Full-Time			01
			Staff-Exempt FT			01
			Faculty Full-Time			01
			Faculty Full-Time			01
			Faculty Full-Time			05
			Staff-NonExempt FT			05
			Faculty Full-Time			07
			Faculty Full-Time			07
			Faculty Full-Time			07
			Faculty Full-Time			07
			Faculty Full-Time			07

Distribution Start Date ▲	Distribution End Date ▲	Distribution to Grant until ▲	Percentage %	Basic Pay Per Period %	\$
01/01/2019	05/31/2019	05/31/2019	89.87		
01/01/2019	05/31/2019	05/31/2019	10.13		
01/01/2019	12/31/2099	12/31/2099	22.50		
01/01/2019	12/31/2099	12/31/2099	77.50		
01/01/2019	05/31/2019	05/31/2019	13.87		
01/01/2019	05/31/2019	05/31/2019	18.00		
01/01/2019	05/31/2019	05/31/2019	24.00		
01/01/2019	05/31/2019	05/31/2019	12.00		
01/01/2019	05/31/2019	06/30/2020	32.13		
09/01/2018	05/31/2019	05/31/2019	30.00		
09/01/2018	05/31/2019	06/30/2020	70.00		
05/06/2019	06/30/2019	06/30/2019	15.00		
05/06/2019	06/30/2019	06/30/2019	85.00		
07/01/2018	06/30/2021	06/30/2021	100.00		
07/01/2018	11/08/2019	12/31/9999	50.00		
07/01/2018	11/08/2019	12/31/9999	50.00		
05/01/2019	05/31/2019	05/31/2019	50.00		
05/01/2019	05/31/2019	05/31/2019	50.00		
07/01/2018	12/31/2099	12/31/2099	100.00		

Free Characteristics

The report contains these Free Characteristics:

- Employee Subgroup
- Employment Status
- Emp Main Assignment
- Emp Master Cost Center
- Organizational Unit
- Personnel Area
- Personnel Subarea
- Position
- WBS Element

Definitions of Selected Data Fields

Data Field Name	Data Type	Definition
Distribution Start Date	Characteristic	Beginning date of an employee's distribution
Distribution End Date	Characteristic	Ending date of an employee's distribution. For employees with multiple distributions, this is the earliest end date among all of an employee's distributions
Distribution to Grant Until	Characteristic	The distribution end date established via PA form by an employee's Payroll Coordinator. This date may or may not correspond to the end date of the associated Internal Order
Percentage	Key Figure	The percentage of an employee's pay that each distribution represents
Basic Pay per Period	Key Figure	A calculation: percentage * employee annual salary

Use Case Example

Once the report has run, a question like this commonly arises: "among all of the distributions returned, which will end this month (or some similar period)?" Suppose the data in your report initially looks like this after running with a History Range of 4/1/19 – 4/30/19:²

Distribution Start Date ▲	Distribution End Date ▲	Distribution to Grant until ▲	Percentage**	Basic Pay Per Period** \$
07/01/2018	12/31/2099	12/31/2099	100.00	13,475.00
01/01/2019	05/31/2019	05/31/2019	89.87	6,979.91
01/01/2019	05/31/2019	05/31/2019	10.13	786.76
01/01/2019	04/30/2019	05/31/2019	100.00	7,766.67
01/01/2019	04/30/2019	05/31/2019	7.79	200.21
01/01/2019	04/30/2019	05/31/2019	18.44	473.93
01/01/2019	04/30/2019	05/31/2019	18.44	473.93
01/01/2019	04/30/2019	05/31/2019	18.44	473.93
01/01/2019	04/30/2019	05/31/2019	36.89	948.11
01/01/2019	12/31/2099	12/31/2099	22.50	1,278.75
01/01/2019	12/31/2099	12/31/2099	77.50	4,404.58
01/01/2019	05/31/2019	05/31/2019	13.87	1,322.27
01/01/2019	05/31/2019	05/31/2019	18.00	1,716.00
01/01/2019	05/31/2019	05/31/2019	24.00	2,288.00
01/01/2019	05/31/2019	05/31/2019	12.00	1,144.00
01/01/2019	05/31/2019	06/30/2020	32.13	3,063.06
			100.00	9,533.33

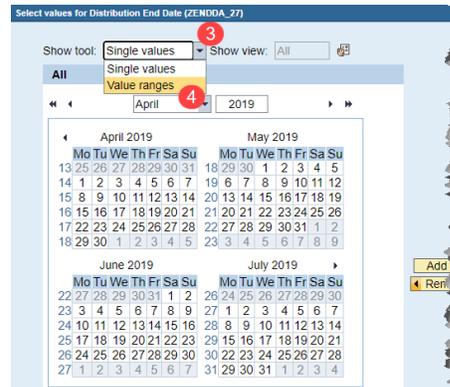
To find all distributions ending during the month, simply filter **Distribution End Date** for any date that falls in April.

Right-click on the column header (1), slide the cursor down and click on **Select Filter Value** (2).

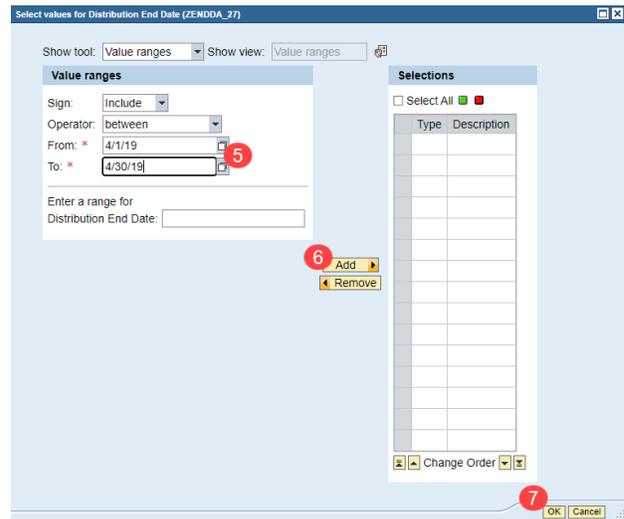
Distribution Start Date ▲	Distribution End Date ▲	Distribution to Grant until ▲	Percentage**	Basic Pay Per Period** \$
07/01/2018	12/31/2099	12/31/2099	100.00	13,475.00
01/01/2019	05/31/2019	05/31/2019	89.87	6,979.91
01/01/2019	05/31/2019	05/31/2019	10.13	786.76
01/01/2019	04/30/2019	05/31/2019	100.00	7,766.67
01/01/2019	04/30/2019	05/31/2019	7.79	200.21
01/01/2019	04/30/2019	05/31/2019	18.44	473.93
01/01/2019	04/30/2019	05/31/2019	18.44	473.93
01/01/2019	04/30/2019	05/31/2019	18.44	473.93
01/01/2019	04/30/2019	05/31/2019	36.89	948.11
01/01/2019	04/30/2019	05/31/2019	100.00	2,570.11

² Subtotals by employee have been added to aid clarity in this example. Refer to [Help Resources](#) for a review of available materials regarding adding report subtotals.

We want to check for any end date that falls in April, so instead of a single value, click the **Show tool** drop-down (3) and select **Value Ranges** (4).



Enter the *From* and *To* dates (5), then click the **Add** button (6) to move the dates to the *Selection* column. Finally, click **OK** (7) to activate the filter.



Here's the result that shows all **Distribution End Dates** that fall in April:

Distribution Start Date ▲	Distribution End Date ▲	Distribution to Grant until ▲	Percentage ^{as}	Basic Pay Per Period ^{as}
01/01/2019	04/30/2019	05/31/2019	7.79	200.21
01/01/2019	04/30/2019	05/31/2019	18.44	473.93
01/01/2019	04/30/2019	05/31/2019	18.44	473.93
01/01/2019	04/30/2019	05/31/2019	18.44	473.93
01/01/2019	04/30/2019	05/31/2019	36.89	948.11
			100.00	2,570.11

Results and Next Steps

None