Payroll Reporting Workshop Agenda: Answer These Questions

Question	Recommendation
What outcome can you expect upon completing today's workshop?	We will use an essential set of BW reporting functions to explore two payroll reports to answer a broad range of employee payment questions
What are the essential BW functions?	Filtering, organizing data based on column position, adding a subtotal or grand total, saving a modified report and undo
What if I can't figure out how to answer a BW question when this workshop is over?	Use online Help or send email to ithelp@bu.edu
Where can I get help with HR forms or other questions related to HCM data or processes?	This HR web page is a great place to start: https://www.bu.edu/hr/hr-systems/process-and-help-guides/
Which report is best to view employee payment activity?	Run *PA15* or *Labor Distribution Funds Center* report
How do I determine which of these two reports is the best one to use?	Use PA15 to view everyone in your organization, regardless of where they are being paid from Use Funds Center report to view everyone you are paying, regardless of Org Unit (this includes students)

Use Case #1: Examine the employees in your <u>organization</u> to answer the questions below	
Question	**Recommendation**
How do I view the payroll results for everyone in my organization?	Run PA15 report (data is identical to PA12)
How do I determine the total paid to each employee?	Add a subtotal by employee
How do I determine how much has been paid to everyone in my organization?	Add a grand total to the report
How do I view hours worked by an employee during a given time period?	Expand the **Salary** Key Figure to view hidden **Hours Worked** column
How can I group employees by category, e.g., full- or part-time faculty or full-time non-exempt staff?	Add **Employee Group** from Free Characteristics
How can I see how much an employee or group of employees was paid by month?	Add one of the **Period / Fiscal Year** Free Characteristics
How can I reorganize data in my report by **Employee Group** or some other Characteristic?	Change column order
How do I view payroll expenses for the month most recently completed?	Filter by date or run report for specific month
How can I undo something I just did?	Back/Back one navigation step

Use Case #2: Save a modified report (aka a "View") so it can be used again in the future	
Question	**Recommendation**
How can I save a report once I have modified it the way I want it?	Create a Saved View

Break / in-class assignment – Your turn!
A. For your department/center, determine the total paid to part-time staff and part-time faculty thus far this Fiscal Year B. What is the total paid to all part-time employees in your organization?

Use Case #2, continued: Save a modified report (aka a "View") so it can be used again in the future	
Question	**Recommendation**
How do I run a customized report I have saved?	Run a Saved View
What if the data in my Saved View doesn't look right?	Check date; examine applied filters

Use Case #3: Dig into the data details to answer the questions below	
Question	**Recommendation**
How can I view additional employee information, e.g., annual salary, percent time or assignment duration?	Use attributes of **Employee (PERNR)** or – recommended – run *Employee Master Data* report
How can I see how much we have paid from our departmental budget or against a specific designated / restricted account?	Examine the cost objects **Cost Center** and **Order** (internal order)
Is it possible to view payment funding sources as a percentage of total pay?	Yes. Display the "hidden" Key Figure **Salary % Distribution** (use the Filter command). This field is useful when investigating effort for employees working on grants

Use Case #4: Examine everyone you are paying, regardless of what organization they are assigned to (includes most students)	
Question	**Recommendation**
How can I see how much I have paid to student employees or someone I paid who is not in my Org Unit?	Run the *Labor Distribution Funds Center* report

Summary of concepts considered during this workshop	
Question	Recommendation
What are the three go-to BW tools important to remember?	Filtering, organizing data by column position and how to add a subtotal or grand total
What types of filtering are possible?	Inclusive/exclusive filters; long-form and short-form filters

If time allows: In-class Discussion
Determine how much was paid in overtime during a specified period.
What are the totals for the fiscal year to date by employee category (Employee Group)? Include students if you pay them.
What are the total amounts paid thus far in the current Fiscal Year by these funding categories: 1. Unrestricted (departmental funds) 2. Designated/restricted