

HR Monthly Review Report

The **HR Monthly Review Report** combines several report subgroups into a single review report with the ability to display the following data: New Hires, Separations, Appointments near end, Distributions near end, Probation period near end, Work permit end date, Limited employee hours, and Distributions greater than 100%.

What Can I Learn From the HR Monthly Review Report?

- Supports users who manage employee appointments by providing the ability to review and monitor specific HR activities and statuses every month
- Provides the ability to run for **all** subgroups or for **specific** activity types

Filtering the Employee HR Monthly Review Report

Filters are divided into four sections:

1 Home Department/Date Filters:

- a** Filter by **Home Dept ID**
- b** The **Date Range** fields are unavailable since this report is always run as of the current date

2 HR Codes Filters (*None of the following are required (*) fields*):

- Filter by **Personnel Program**, **Appointment Type**, **Employee**, **Title Code**, **Employee Status**, **Title Unit Code**, **Class Title Outline**, and/or **Appointment Representation Code**

3 Report Specific Filters

- Filter by **Activity Type**, **Supervisor**, **Separation Reason**, and/or **Visa Type**
- **Activity Type** is a **required (*)** field. The default Activity Type is **All**

4 Distribution Chartstring Filters:

- Filter by one or more chartfield: **BU** (Business Unit), **Fund**, **Dept ID**, **Project**, **Function**, **Flexfield**, **Dept ID Site**, **Project Award/Parent**, **Project Manager/PI**, **Project Use**, and/or **Project Lab Owner**
- **Account** and **Activity Period** (**a**) are unavailable because these chartfields are not used in HR distribution data

The screenshot displays the filter interface for the HR Monthly Review Report, organized into four numbered sections:

- Section 1: Home Department/Date Filters**
 - a** Home Department: A dropdown menu showing 'SF Prog Mgmt Office' with 'Add' and 'Remove' buttons.
 - b** Date Range: Fields for 'Begin Date' and 'End Date', each with 'From' and 'To' sub-fields and a date selector.
- Section 2: HR Codes Filters**
 - Personnel Program: A list box with options like '1 - Professional and Support Staff'.
 - Appointment Type: A list box with options like '1-Contract'.
 - Employee: A text input field.
 - Title Code: A text input field.
 - Title Unit Code: A text input field.
 - Class Title Outline: A text input field.
 - Appt Rpt Code: A list box with options like 'C-Covered'.
 - Employee Status: A list box with options like 'A-Active'.
- Section 3: Report Specific Filters**
 - Activity Type: A list box with 'All' selected.
 - Separation Reason: A text input field.
 - Visa Type: A text input field.
 - Supervisor: A text input field.
- Section 4: Distribution Chartstring Filters**
 - A grid of chartfield filters including BU, Account, Fund, Dept ID, Project, Activity Pd, Function, and Flexfield. Each has an 'Add' and 'Remove' button.
 - A red circle **a** points to the 'Account' and 'Activity Period' fields, indicating they are unavailable.
 - Below the grid are additional chartfields: Dept ID Site, Project Award/Parent, Project Manager/PI, Project Use, and Project Lab Owner, each with an 'Add' and 'Remove' button.

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Tips & Tricks

- The filter page can be used to enter a single criterion, such as **Home Department** or **Employee**. **Note:** At least one field with an orange triangle must be selected
- The report can be narrowed using the many available **HR Code** and **Report Specific** filters
- Running the report for **Home Department** or **Distribution Dept ID** will return all of the *children* Dept IDs in the report.
- This report is *always* run as of the current date
- The selection of **Activity Type** (a) can be made from the filter page or from within the report
- HR reports do not contain subtotals or totals by Activity Type
- You can display **Code Descriptions only**, **Codes only**, or **both** using the drop-down menu in the upper left corner of the report view (b)
 - Displaying the **Codes and Code Descriptions** in the report will expand the report width considerably - if you need to print the report, the default view of **Codes Only** is recommended.
- In the report view, each **Activity Type** (c) is grouped separately with a header. (Note that the view with **All** types is a very wide report and can be difficult to analyze. Selecting one or two activity types is recommended.)
 - Hires** - displays employees with a hire date 45 days prior to the report run date and any future dates
 - Separations** - displays employees with a separation date 45 days prior to the report run date
 - Appointment Near End** - displays employees with an appointment end date within 3 months of the report run date
 - Distribution Near End** - displays employees with a distribution end date within three months of the report run date
 - Limited Employee Hours** - displays Limited employee hours worked in the last 12 months. Hours ≥ 700 hours are displayed in red font.
 - Distribution > 100%** - displays employees with a sum of all distributions greater than 100%
 - Work Permit End Date** - displays employees with a work permit end date field from PPS. End dates within 3 months are displayed in red font
 - Probation Period End Date** - displays employees with a probationary end date 45 days prior to the report run date and any future dates

From the filter page

From within the report

Additional columns, especially the Code Descriptions, may add considerable width to the report

Each Activity Type is grouped separately with a header

The screenshots illustrate the report's functionality. The first shows the 'Activity Type' filter on the filter page and within the report. The second shows the 'Display Code & Descriptions' dropdown menu. The third shows a detailed report view with columns for Employee Name, Employee ID, Primary Title Code, Primary Title Name, Hire Date, Home Department Title, Employee Status, PPC Personnel Prog Code, Appt Type, TUC Unit Code, and Appt Number. The report is grouped by Activity Type, with headers for 'Appointment Near End', 'Distribution Near End', 'Limited Employee Hours', and 'Probation Period End Date'.

Employee Name	Employee ID	Primary Title Code	Primary Title Name	Hire Date	Home Department Title	Employee Status	PPC Personnel Prog Code	Appt Type	TUC Unit Code	Appt Number
CHAK, CHARLES	1721	PROF-HCOMP	12/01/1983	333019	P-Pharmaceutical Chemistry	A	ACAD	5	A2	20
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BRIDGEMAN, JEFFREY	7235	ANL 2	04/24/2013	408		1.00	02H02031	CAVATZ DELIA A.		
BRIDGEMAN, JEFFREY	7235	ANL 2	04/24/2013	40		76	02H02031	CHIL, CYNTHIA		
BRIDGEMAN, JEFFREY	7235	ANL 2	04/24/2013	40		1.00	02H02031	CAVATZ DELIA A.		
SHUSHREKAR, VALDINE	7238	ANL 5	08/20/2012	40		1.00	02H02031	WALLACE, SHARVY LEHR		
SHUSHREKAR, VALDINE	7238	ANL 5	11/25/2013	40		76	02H02031	CHIL, CYNTHIA		
CHIL, CYNTHIA	7817	ACCOUNTANT 3	02/22/2013			76	02H02031	WALLACE, SHARVY LEHR		

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