Human Resources Reporting

Employee Appointment Reports
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  • View a list of the active employees for the selected organization with links to Current and Future Appointment Report and the Payroll History Report
RPT_EMPL_008 – Employee Organizations

- Displays at employee level the different organizations an employee may be associated with. Provides the check distribution organization.

RPT_NBAJOBS_010 – Salary Roster by FOAP

- Shows the filled positions by the Job Labor Distribution FOAP.

RPT_NBAJOBS_011 – Appointment History Report

- A summary of salary appointments presenting the approved or budgeted salary for each employee. The actual amount paid may differ from the appointments shown in the report.

RPT_NBAJOBS_015 – Overloads Report

- Shows Overload Pay details with the options to view the data grouped by FOAP or by person without the FOAP details.
HR009 – Salary Roster by Organization

This provides by FOAP and Position Class, employee assignments for the organization or position entered. Included are the date the FOAP began to support the salary and the amount of annual salary the FOAP is supporting. A summary total of salary paid by position class within a FOAP is provided. It is possible that an employee is funded by more than one FOAP – the FOAP % column will disclose this information. If it shows less than 100%, then more than one FOAP supports the salary for that employee.

Parameter Page:

- Select Chart of Accounts

- Select Position Organization for listing of all FOAPs with salary assignments

OR

- Enter Position Number (T#) for salary assignment for only that position.
The report provides the following information:

- Within the FOAP and Position Class, the following details are provided:
  - **ID** – A nine character alpha numeric identifier used to identify an employee, referred to as “R-number or Tech ID”.
  - **Name** – Employee’s legal name
  - **Employee Class Code with Description** – Provides information related to pay frequency, full or part time and benefit and leave category.
  - **Position** – The position code and title the employee is assigned to.
  - **Job Suffix** – Used with position number to identify whether primary, secondary, allowances, overloads or other employee payments.
  - **Pay Code** – Indicates if employee is paid monthly (M) or semi-monthly (SM).
  - **Job Type** – Identifies if the job is Primary (Home Position), Secondary (in addition to Home Job), or it may be an allowance or overload.
- **Single or Pooled** – Indicates if more only one person can be assigned to the position (S) at a time or if more than one can be assigned to the position at a time (P).
- **Job Labor Dist Eff Date** – The date the FOAP began supporting the salary for the identified position.
- **FOAP Percent** – The percent of the salary for the identified employee position assigned to the FOAP.
- **FOAP Annual Salary** – The dollar amount the identified FOAP will pay towards the shown position for the identified employee.

**HR020 – New Hire Report for Departmental Users**

This report is used to view a list of new employees for selected Home Organization department for a given date range or year to date. This report shows only those employees who are **new to TTU**. If the employee transferred from another department, they will not appear on this report. The data returned provides details for all of the organizations that the user has permission to view. It is possible to view new hires by benefits category as well.

**Parameter Page:**

- Select the Home Organization Chart
- Select the date range, if desired
- Choose a Benefits Category, if desired
The New Hire Report provides the following details:

- **ID** – The “R-number” given to the employee for identification purposes. No two people will be assigned to the same R-number.
- **Name** – Legal Name of the employee.
- **Position Title** – The description of the position the employee is assigned to.
- **Supervisor** – The person the new hire reports to.
- **Date of Hire** – The date the person became an active employee of the university.

*Note ** Employees will appear only if the org is the designated “Home Org” of the employee. If the employee has a secondary position in a different organization, they will not appear on this report for that organization. These employees can be viewed on the HR035 – Employee Search Report.*
HR022 - Termination Report for Departmental Users

This report shows by Home Organization those employees who have severed their employment with Texas Tech. It is the Home Organization of an employee that creates a termination ePAF, so if the person had a secondary position in a different organization, the employee would not be visible on reports for that organization. Employees who have left one organization on campus and transferred to another will not display on this report. The report is designed to provide data at the Organization Level, at the Employee Level and for a specific date range.

Parameters:

- Select the Home Organization Chart
- Select the date range, if desired
- Select the Home Organization, if desired. If not selected, all organizations that the user has permission to view will display.
The Termination Report provides the following details:

- **ID** – The “R-number” given to the employee for identification purposes. No two people will be assigned to the same R-number.
- **Name** – Legal Name of the employee.
- **Position Title** – The name of the position the employee is assigned to.
- **Benefit Category** – A code with description providing information regarding benefits the employee could have received.
- **Position Personnel Date** – The date the employee last worked.
- **Effective Date** – The date the termination became effective, this will be the last paid date.
- **Job Change Reason** – Code and description used to categorize why an employee left will either be terminate or retirement.

<table>
<thead>
<tr>
<th>Department: X12121 - Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ID</strong></td>
</tr>
<tr>
<td>R1111111</td>
</tr>
<tr>
<td>R2222222</td>
</tr>
<tr>
<td>R3333333</td>
</tr>
</tbody>
</table>
HR035 – Employee Search Report

This report provides details regarding a person’s current and past employment status, providing both person information and job activity information. This report is helpful when creating an ePAF, viewing benefits by Orgn, and when viewing employee details individually or by Orgn.

The parameter page is designed so that data can be requested at either the organization or the employee level, with the possibility of selecting specific benefit categories, and to view active or inactive jobs. Calendar prompts are provided so that dates can be entered as well.

- **Select Chart of Accounts** - Select from TTU, TTU System or TTU Health Sciences Center.
- **Choose Jobs to Include** – Select Active Jobs, Inactive Jobs, or both.
- **Home Organization** – If entered will show all employees whose “Home Organization” is entered.
- **Position Organization** - Shows employees who have jobs in positions controlled by the Organization entered.
- **Benefit Category** - Select a specific category for which employee details are needed.
- **Banner ID** – Search for a specific employee by R#.
- **Employee Name** – Search by last name of employee if R# is not known.
- **Job Ended** – See employees whose jobs ended after the date entered.
- **Terminated Since** - View employees terminated since the date entered.
### Person Information:
- **Employee ID** – This is used in place of a social security number on campus. Called the Tech ID or R#, no two employees will share an R#.
- **Employee Name** – The name of the person to whom the R# is assigned.
- **FTE** – Full Time Equivalency. A person cannot exceed an FTE of 1.
- **Employee Class** – Code and category as to how the employee is classified as per Pay Frequency, Benefit and Leave Category and Full or Part Time.
- **Benefit Category** – Shows benefit eligibility status of employee, but does not mean they have elected to received available benefits.

### Job Information:
- **Job Type** – Code that signifies if job assignment is Primary, Secondary or Overload.
- **Pay Code** – Code that shows frequency of pay, MN is monthly and SM is semi-monthly.
- **Original Hire Date** – The date employee was first hired at TTU.
- **Current Hire Date** – In the event employee worked for TTU, terminated and rehired, this is the date they were re-hired.
- **Job Begin Date** – The date the person was first assigned to the Job identified in the Job column.
- **Job End Date** – The date the assignment to the Job identified in the Job column was ended.
- **Termination Date** – The date the employment relationship with TTU was terminated.
- **Job** – Code and description of the “job” the employee is / has been assigned to.
- **Job Status** – The current state of job: A-Active; T-Terminated; L- Leave without pay/benefit; B- Leave without pay with benefit; F- Leave with pay/benefit.
- **Supervisor’s Name** – The person to whom the employee reports.
HR112 – Encumbrance Report for Pooled Positions by Position Org

This report is used to view Pooled Positions for an organization (Position Org level) and the amount encumbered both for the position and for the employee(s) assigned to the position. A pooled position is a position that more than one person can be assigned to.

**Parameter Page 1:**
Select Chart of Account and Organization

![Parameter Page 1: Select Chart of Account and Organization](image)

**Parameter Page 2:**
Select Position Number(s)

![Parameter Page 2: Select Position Number(s)](image)
### Encumbrance Report for Pooled Positions by Position Org

**Texas Tech University**  
Encumbrance Report for Pooled Positions by Position Org  
Fiscal Year: 2013  
05/02/13

**Organization:** X22222 - Organization

**Position:** T92681 - Student Assistant

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee ID</th>
<th>Position FTE</th>
<th>Position Assigned Salary</th>
<th>Employee Encumbrance</th>
<th>Position Budget</th>
<th>Current FOAP</th>
</tr>
</thead>
<tbody>
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</table>

**Position:** T11111 - Instructor

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee ID</th>
<th>Position FTE</th>
<th>Position Assigned Salary</th>
<th>Employee Encumbrance</th>
<th>Position Budget</th>
<th>Current FOAP</th>
</tr>
</thead>
<tbody>
<tr>
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<td>45,000.00</td>
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</tr>
</tbody>
</table>

**Position:** T22222 - Instructor

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee ID</th>
<th>Position FTE</th>
<th>Position Assigned Salary</th>
<th>Employee Encumbrance</th>
<th>Position Budget</th>
<th>Current FOAP</th>
</tr>
</thead>
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<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>228,399.81</td>
<td></td>
</tr>
</tbody>
</table>

Grouped by Position Organization and sectioned by Position, the following information is provided in this report:

- Employees Assigned to the Position
  - For each employee, the following is provided:
    - Employee ID (R-number)
    - Position FTE
    - Position Assigned Salary
    - Employee Encumbrance
  - The Encumbrance Amount shows the amount encumbered against the FOAP displayed in the final column of this report.
HR121 – Current and Future Appointment Report

This report is useful for ePAF completion and for viewing current as well as future appointment information for an employee. In order to execute for an employee, you must have been given access to the HOME organization of that individual. The report shows current and future position appointments if you have access to the employee’s position organization.

The parameter page is divided into two sections. In the top section are the options to execute the report for employee(s) level while the bottom section is for an Organization(s). Note the drop down that allows excluding employees who do not have a current appointment.
The report provides information about the person in three areas within this report: Employee Information, Job Information and Job Labor Distribution Information. The first section titled “Employee Information” details specifics about the person. Such as Employee ID, Employee Status, E Class, Full or Part time as well as the assigned Home Organization.

The second section details job information. Each position to which person is assigned will be detailed here. Note that the Position ORGN can be different from the Home ORGN. In this area Status, Job Type Job Begin and End Dates as well as Last Paid Date. FTE and Factors and Pays are visible as well as the Annual Salary for the Position identified in the second column of this section.

The third section details for each position the FOAP that is assigned for payment and the percent assigned to that FOAP, as well as the amount of pay per pay period.

If a future appointment is in place (ePAF through approvals), details regarding that will display in the bottom section of the report.
RPT_EMPL_007 – Employee List by Home Organization

The Employee List by Home Orgn provides a list of the active employees for the organization entered. This report is can be used to view employee class, benefit and hiring date information as well as viewing current employees. It is also possible to link to the Current and Future Appointment Report and the Payroll History Report for at the employee level from this report.

Parameter Page

- Select the Chart of Accounts
- Type in Home Organization in field provide **or**
  - Select organization from Hierarchy Tree Prompt
- Select Next to select PDF / Excel format or select Finish to execute report
The information provided by this report includes:

- Home Organization Code
- Home Organization Description
- Employee R# (Tech ID)
- Employee Name
- Full / Part Time Indicator
- Employee Class and Description
- Leave Category and Description
- Benefit Category and Description
- Hiring Location and Description
- Original Hire Date
- Current Hire Date
- Links to Current and Future Appointment Report and Payroll History Report – will provide individual employee details but not organization details.
RPT_EMPL_008 – Employee Organizations

This report is executed at the employee level only. It is used to see all of the organizations associated with an employee.

Parameter page – Enter last name of employee and select search. Select employee in Results box

The report provides the Check Distribution Organization and Home Organization of the employee in the top section: and in the bottom section the Position, Job Suffix, Supervisor and Position Orgn are detailed.
RPT_NBAJOBS_010 – Salary Roster by FOAP

This report shows filled positions by the Job Labor Distribution FOAP. This report is designed to show all employees, based on the fund and orgn input on the parameter page, who have a job assignment that is assigned to that fund and orgn regardless of the position orgn. This could result in employees with positions that are assigned to or owned by a different orgn.

Parameter page shown below requires that the Chart of Account be entered. Enter The Fund or Organization or both if desired, or select multiple organizations or a higher level of the organization hierarchy by using the tree prompt. A second parameter page option allows choosing PDF or Excel for report output style.
### Salary Roster by FOAP

This report shows filled positions by the job Labor Distribution FOAP.

<table>
<thead>
<tr>
<th>FUND</th>
<th>ORGN</th>
<th>FRGM</th>
<th>ACCT</th>
<th>FOAP Pct</th>
<th>Position ORGN</th>
<th>P Class</th>
<th>Home ORGN</th>
<th>Home ORGNIZAITON</th>
<th>Position</th>
<th>Suffix</th>
<th>Job FTE</th>
<th>Job Salary</th>
<th>Tech ID</th>
<th>Pay Code</th>
<th>LBED Eff Date</th>
<th>Job Type</th>
<th>FTE on FOAP</th>
<th>Salary on FOAP</th>
<th>OBS Eff Date</th>
<th>Sta</th>
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<td>$15,302.42</td>
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<td>A</td>
</tr>
</tbody>
</table>

**Fund – Organization – Program – Account** – The funding account for the Position represented within the row.

**FOAP Pct** – The percent of the assigned salary for the position that is funded by the identified FOAP.

**Position Organization** – The organization that the position belongs to.

**Position Class** – Code and title which identifies the benefit category and leave category for a position.

**Home Organization** – The home organization of the employee assigned to the position represented; may differ from the Position Orgn.

**Position** – Alpha numeric code used to identify the position assignment. Referred to as the “T Number”, this number belongs to the department and does not transfer with an employee if he/she changes departments.

**Suffix** – For the Primary Job this is 00. For special Pays, Overloads and Summer Appointments the job suffix will change. See “Forms of Employee Pay” document.

**Job FTE** – Full time equivalency, a person cannot exceed an FTE of 1.

**Job Salary** – The yearly amount paid to the person for the assigned to the identified position.

**Tech ID** – The code used to identify an employee, also referred to as “R-number”.

**Pay Code** – Code that shows frequency of pay, MN is monthly and SM is semi-monthly.

**Job Labor Eff Date** – The date the FOAP began paying the salary of the person assigned to the identified position.

**Job Type** – A code that signifies if job assignment is Primary, Secondary or Overload.

**FTE on FOAP** – Shows the full time equivalency of the employee that is assigned to the FOAP.

**Salary on FOAP** – Dollar amount the FOAP pays towards the employee's salary.

**Jobs Effective Date** – The date the employee was assigned to the position.

**Status** – Shows the current status of the employee – Active / Inactive.
RPT_NBAJOBS_011 – Appointment History Report

This report is a summary of Salary Appointments only. The salary information presented in this report is the approved or budgeted salary for each employee. In some circumstances (such as Leave without Pay, Labor Redistributions), the actual amount paid may differ from the salary appointments shown in this report.
Current Employee Information provides details including:
- Employee ID
- Employee Name
- Employee Status
- Current Hire Date
- Original Hire Date
- E Class
- E Class Description
- Full / Part time Indicator
- Hiring Location
- Chart of Accounts
- Home Organization and Home Organization Description

Job Information provides details including:
- Position Number and Title
- Job Suffix
- Effective
- Eff Start Date and Eff End Date
- Change Reason
- Status
- Position Orgn and Description
- Payroll ID
- Job Type
- FTE
- Hourly Rate
- Hours / Units per pay
- Assign Salary Per Pay Period
- Factor
- Pay Periods
- Annual Salary

Job Labor Distribution details include:
- Position Number
- Position Title
- Job Suffix
- Eff
- Eff Start Date
- Eff End Date
- Status
- COAS
- Fund with Description
- Orgn with Description
- Account with Description
- Program
- Amount Pay per Period
- Percent assigned to FOAP
RPT_NBAJOBS_015 – Overloads Report

This report information regarding Overload Pay for the following Earn Codes: ADC – Additional Compensation, FTO – Field Training, SPA – Special Augmentation, SRC – Supplemental Ret Compensation, CAR- Car Allowance, OTB – Other Taxable Benefit and CPA – Cell Phone Allowance. There are two view options for the data (Grouping & Sorting parameter). The first view is grouped by FOAP and the second is grouped by person without the FOAP details.
Grouped by Budgeted Org, See All Earn Codes and Recipients, (No FOAP Info)

Overloads Report

T - ORGN: X12121 - Grouping & Sorting: See ALL Earn Codes and Recipients (No FOAP Info)

Report gives the user two different view of overloads. The first is by FOAP the second is by person. Earn code is in the following list: (ADC, FTO, SPA, SRC, CAR, OTB, CPA)

<table>
<thead>
<tr>
<th>Budget ORGN</th>
<th>Name</th>
<th>Earn Code</th>
<th>P Class</th>
<th>Position</th>
<th>Position Title</th>
<th>Suffix</th>
<th>Pay Code</th>
<th>Special Rate</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>X12121</td>
<td>Employee One</td>
<td>CPA</td>
<td>S0614</td>
<td>T1111111</td>
<td>Manager</td>
<td>P6</td>
<td>MN</td>
<td>$120.00</td>
<td>$1,440.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Employee One</td>
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<td>$1,440.00</td>
</tr>
<tr>
<td></td>
<td>X12121 - Reporting</td>
<td></td>
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<td>$120.00</td>
<td>$1,440.00</td>
</tr>
</tbody>
</table>

Summary

<table>
<thead>
<tr>
<th>Name</th>
<th>Earn Code</th>
<th>P Class</th>
<th>Position</th>
<th>Position Title</th>
<th>Suffix</th>
<th>Pay Code</th>
<th>Special Rate</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CPA</td>
<td>S0614</td>
<td>T1111111</td>
<td>Manager</td>
<td>P6</td>
<td>MN</td>
<td>$120.00</td>
<td>$1,440.00</td>
</tr>
</tbody>
</table>

Grouped by Fund, See All Earn Codes by FOAP

Overloads Report

T - ORGN: Z23232 - Grouping & Sorting: See ALL Earn Codes by FOAP

Report gives the user two different view of overloads. The first is by FOAP the second is by person. Earn code is in the following list: (ADC, FTO, SPA, SRC, CAR, OTB, CPA)

<table>
<thead>
<tr>
<th>FUND</th>
<th>ORGN</th>
<th>Budget ACCT-Code</th>
<th>PROG</th>
<th>ACCT</th>
<th>Earn Code</th>
<th>Tech ID</th>
<th>Name</th>
<th>P Class</th>
<th>Position</th>
<th>Position Title</th>
<th>Suffix</th>
<th>Pay Code</th>
<th>Special Rate</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>16A032</td>
<td>Z23232</td>
<td>6A9</td>
<td>400</td>
<td>6A911111</td>
<td>CPA</td>
<td>R1111111</td>
<td>Employee One</td>
<td>S0616</td>
<td>T111111</td>
<td>Associate Director</td>
<td>P6</td>
<td>MN</td>
<td>$75.00</td>
<td>$900.00</td>
</tr>
<tr>
<td>16A032</td>
<td>Z23232</td>
<td>6A9</td>
<td>400</td>
<td>6A911111</td>
<td>CPA</td>
<td>R22222222</td>
<td>Employee Two</td>
<td>S0614</td>
<td>T22222</td>
<td>Unit Manager</td>
<td>P6</td>
<td>MN</td>
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<td>$900.00</td>
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<td>18C333</td>
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<td>6A9</td>
<td>400</td>
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<td>CPA</td>
<td>R33333333</td>
<td>Employee Three</td>
<td>S0613</td>
<td>T33333</td>
<td>Academic Dean</td>
<td>P6</td>
<td>MN</td>
<td>$75.00</td>
<td>$900.00</td>
</tr>
</tbody>
</table>

Summary

<table>
<thead>
<tr>
<th>Name</th>
<th>Earn Code</th>
<th>P Class</th>
<th>Position</th>
<th>Position Title</th>
<th>Suffix</th>
<th>Pay Code</th>
<th>Special Rate</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CPA</td>
<td>S0613</td>
<td>T33333</td>
<td>Academic Dean</td>
<td>P6</td>
<td>MN</td>
<td>$75.00</td>
<td>$900.00</td>
</tr>
</tbody>
</table>

Report Summary

<table>
<thead>
<tr>
<th>Name</th>
<th>Earn Code</th>
<th>P Class</th>
<th>Position</th>
<th>Position Title</th>
<th>Suffix</th>
<th>Pay Code</th>
<th>Special Rate</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CPA</td>
<td>S0613</td>
<td>T33333</td>
<td>Academic Dean</td>
<td>P6</td>
<td>MN</td>
<td>$75.00</td>
<td>$900.00</td>
</tr>
</tbody>
</table>

See Earning Codes – Definitions