HCM: CONFIDENTIAL DASHBOARD
A Quick Reference Guide for HCM: Department Admin Users

Overview:

HCM: Confidential is primarily a re-organization of HCM: Department Admin plus some additional content.

The Action Items includes MSAT as well as alerts that were on the report page. This brings items requiring attention to the forefront of the dashboard.

What are the differences?

This is the general page layout for HCM: Department Admin

HCM: Department Admin	HCM: Department Admin generally has 1 page for a report.
Manager Action Items Leave Accrual	

Prompting

Prompting

Pay Period End Date
2018-02-17

Manager

Reporting Group
Direct Reports

HR Dept
(All Column Values)

* Employee
(All Column Values)

Apply   Reset

Report Body Shown here are personnel transactions by Effective Date and Action Date

> On new dashboard, multiple reports on a page.

Personnel Transactions - Action Date

For Action Dates within the Pay Period Ending on 2018-02-17

	Employee ID	Employee Record	Employee Name	Effective Sequence	Effective Date	Job Title	Position Number	Action	Action Reason	FTE	Grade	Step	Organization Relationship	Bi-Weekly Rate	Annual Salary
*				0	2/5/2018	Non Employee	-	ADD	Consultant	0.00	-	0	Contingent Worker	0.00	0.00
*				0	2/4/2018	Professional Support Staff	-	HIR	Hire	1.00	-	0	Employee		
*				0	2/6/2018	Non Employee	-	ADD	Consultant	0.00	-	0	Contingent Worker	0.00	0.00

*Indicates Current Job Row
Print - Export

Personnel Transactions - Effective Date

For Effective Dates within the Pay Period Ending on 2018-02-17

Effective Date	Employee ID	Employee Record	Employee Name	Effective Sequence	Position Number	Action	Action Reason	FTE	Grade	Step	Organization Relationship	Job Title	Bi-Weekly Rate	Annual Salary
* 2/4/2018				0		RFL	Return From Leave	1.00	6	0	Employee	Applications Specialist I		
* 2/5/2018				0	-	ADD	Consultant	0.00	-	0	Contingent Worker	Non Employee	0.00	0.00
* 2/5/2018				0	-	ADD	Consultant	0.00	-	0	Contingent Worker	Non Employee	0.00	0.00
* 2/4/2018				0	-	HIR	Hire	1.00	-	0	Employee	Professional Support Staff		
* 2/6/2018				0	-	ADD	Consultant	0.00	-	0	Contingent Worker	Non Employee	0.00	0.00

* Indicates Current Job Row .
Print - Export

Alerts Section
Links to reports with actionable information

Alerts

Employees within 25 hours of Maximum Leave Limit based on Last Closed Pay Period

Reports Related Reports

Reports

Action Date by Selected Calendar Date

Effective Date by Selected Calendar Date

Data Refreshed

The data is as of February 27, 2018

> On new dashboard, this content moves to the Action Page with report displayed instead of a link.

> On new dashboard, these links are now above the related reports or on the report.

This is the general page layout for HCM: Confidential.

HCM: Confidential groups reports under 5 primary themes: Action Items, Hiring, Managing, Paying and Terminating

HCM: Confidential

Action Items | Hiring | Paying | **Managing**

Prompting

Prompt

Pay Period End Date
2018-02-17

Manager

Reporting Group
Direct Reports

HR Dept
(All Column Values)

* Employee
(All Column Values)

Jobcode ID - Descr
(All Column Values)

Employee Classification
(All Column Values)

Apply   Reset

Report Selector

Report Selection

Select Managing Content:
- ☑ Employee Listing
- ☑ Employee Roster
- ☐ Employee Change Report
- ☐ Expected End Date
- ☐ Personnel Transactions
- ☐ Performance Ratings
- ☐ Post Docs
- ☐ Visa Management

Report Body

Reports that were on separate pages are now grouped by function

Employee Listing

Employee Name ID	Empl Rcd	Pay Status	Position Number	Hire Date	Rehire Date	Union Code	Union Date	HR Dept	HR Dept Short Desc	Org Relationship	Reg/Temp	Employee Classification	Jobcode	Job Title	Job Entry Date	FTE
		Active		6/11/2006	6/11/2006	P72			InfoMngSrv	Emp	Regular	Professional			1/16/2011	1.0

Print - Export

Employee Roster

Select View: Department

C816320 - UITS-Information Mangmnt Srvcs
Employee

Person Name ID	Empl Rcd	Position Number	Employee Status	Manager Name Emplid	Job Code	Job Title	Business Title	Employee Classification	Union Code	Workgroup	Grade	Step	Effective Date	Last Hire Date	End Date	Auto End Flag	FTE	Std Hours	Comp Freq Code	Compensation Rate	Account	Fund Code	Deptid	Proj ID
			Active					Professional			10	0	2017-06-25	2006-06-11			1.00	40.00	B			51443	
	Total																							

Print - Export

Performance Ratings

Employee Name ID	HR Dept ID - Desc	Jobcode ID - Descr	Grade	Employee Classification	Salary Plan Code	Salary Plan	Review Type Desc	Last Review To Date	Review Rating	Review Rating Desc	Next Review Date
				Professional			Performance	6/30/2016	3	Meets Standards	7/1/2016

Print - Export

Personnel Transactions

Personnel Transaction Report filtered by: ● Action Date ○ Effective Date

Additional Transaction Reports

PTR by Action Date for Custom Date Range   PTR by Effective Date for Custom, Date Range

Personnel Transaction Report - Action Date
There are no personnel transactions for action dates within the selected pay period.
Refresh

New Prompt options for all reports

Report selection menu
Content can vary by Campus

Report Sub-menu
For different versions (selection) of the same basic report.

No Results
Some reports may not have results.

Links for related reports
These are now above the main report for ease of use and visibility.

Action page layout is different

Action Page Layout

HCM: Confidential
Action Items

Page Body

Toggle view:
Manager = our direct reports only
Department = All your departments and staff

The data is as of February 26, 2018

Action Items for
Your Name here

Select Managing/Paying Action Item View ● Manager   ○ Department

Managing Action Items

Section Headers:
Action Item groups match dashboard pages.

Performance Rating Past Due

Person Name ID	HR Dept ID - Desc	Jobcode ID - Descr	Grade	Employee Classification	Salary Plan Code	Salary Plan	Review Type Desc	Last Review To Date	Review Rating	Review Rating Desc	Next Review Date
				Profession		Prof	Performance	6/30/2017		Exceeds Standards	7/1/2017
			9	Profession		Prof	Performance	6/30/2017		Meets Standards	7/1/2017
				Profession		Prof	Performance	6/30/2016		Meets Standards	7/1/2016
				Profession		Prof	Performance	6/30/2017		Exceeds Standards	7/1/2017
				Profession		Prof	Performance	6/30/2017		Exceeds Standards	7/1/2017
			9	Profession		Prof	Performance	6/30/2016		Exceeds Standards	7/1/2016

Print - Export

Reports only appear if they meet the action item trigger which generally is some action needs to be taken within X days.

Paying Action Items

Employees within 25 Hours of Maximum Leave Accrual
based on last closed pay period

- Red Flag - Accrual max reached
- Yellow Flag - Within 25 hours of accural max

Accrual Process Date: 2018-02-17

Employee Name	Employee ID	Plan Type	Balance Hours	Max Allowed Leave Balance	
		Sick	946.76	960.00	🟨
		Vacation	368.00	368.00	🟥
		Vacation	368.00	368.00	🟥

Print - Export

Confirm System Approved Time

Confirm System Approved Time

Instructions by Campus: Boston   Dartmouth   Lowell   President's office

Select Approval Group ● Direct Reports   ○ Indirect Reports

Confirm and/or Adjust System Approved Time

If System Approved Time requires an adjustment then
1. Select the adjustment view below and follow the instructions.
2. Select the confirm time view and and follow the instructions.

HCM: CONFIDENTIAL DASHBOARD
A Quick Reference Guide for HCM: Department Admin Users

Where can I find my favorite HCM: Department Admin reports on the new dashboard?

HCM: Department Admin			HCM: Confidential	
Page	**Section**	**Report**	**Page**	**Report Retired**
Manager Action Items		Confirm System Approved Time	Action Items	
Leave Accrual	Body	26 Pay Period Trend		*X*
Leave Accrual	Body	Leave Accrual	Paying	
Leave Accrual	Alerts	Employees using < 1 standard weekly hours of sick time (Rolling Year)		*X*
Leave Accrual	Alerts	Employees using < 2 standard weekly hours of vacation (Rolling Year)		*X*
Leave Accrual	Alerts	Employees within 25 hours of Maximum Leave Limit based on Last Closed Pay Period	Action Items	
Leave Accrual	Reports	Comp Time Balance	Paying	
Leave Accrual	Reports	Leave Accrual - By Person and Department_All Emp Status		X
Employee Roster	Body	Employee Roster (new combined version)	Managing	
Employee Roster	Reports	Post Docs	Managing	
Employee Roster	Reports	Visa	Managing	
Personnel Transaction	Body	Personnel Transactions - Action Date	Managing	
Personnel Transaction	Body	Personnel Transactions - Effective Date	Managing	
Personnel Transaction	Reports	New Hires - Future Pay Periods (Boston Only)	Hiring	
Personnel Transaction	Reports	Action Date by Selected Calendar Date	Managing	
Personnel Transaction	Reports	Effective Date by Selected Calendar Date	Managing	
Personnel Transaction	Reports	Post Docs	Managing	
Encumbrance Expiration	Body	Encumbrance Expiration	Paying	
Encumbrance Expiration	Alerts	Impending Encumbrance Expiration - Expiring in the Current and Next Pay Periods	Action Items	
Encumbrance Expiration	Reports	Encumbrance Expiration – Selected Dates	Paying	
Bi-Weekly Ad-Comp	Body	Bi-Weekly Ad-Comp	Paying	
Bi-Weekly Ad-Comp	Alerts	Inactive Employees with Ad Comp for Selected Pay Period	Action Items	
Bi-Weekly Ad-Comp	Reports	Ad Comp for Range of Pay Periods	Paying	

HCM: CONFIDENTIAL DASHBOARD

A Quick Reference Guide for HCM: Department Admin Users

HCM: Department Admin			HCM: Confidential	
Page	**Section**	**Report**	**Page**	**Report Retired**
Expected End Date	Body	Expected End Date (new combined version includes Appointment End Date)	Managing	
Expected End Date	Alerts	Expected End Date - Employee Details by Funding - Impending Expiration	Action Items	
Time and Labor	Body	Existing time	Paying	
Time and Labor	Body	All Time (append contingent workers)	Paying	
Time and Labor	Reports	Time and Labor Adjustments -Create Time Adjustment Document		X
Time and Labor	Reports	Time and Labor - Multiple Pay Periods	Paying	
Time and Labor	Reports	TRC History Report for Selected Dates and TRC	Paying	
Time and Labor	Reports	Comp Time Balance	Paying	
Time and Labor	Action Item	Paid - Time Confirmation Required (Batch approved time; Manual method)		X
Payroll Register	Body	Payroll Earnings	Paying	
Retro Funding	Body	Retro funding	Paying	
Position Management	Page	Collection of Position MMGT reports	Position Management	

What's New

HCM: Confidential		
Page	**Report**	**Description**
Hiring	Hires and Rehires	Report of New hires for a selected date range Action code = HIR, ADD and REH for Action, Effective or Last Hire Date within selected date range
Terminating	Terminated and Retired	Report of Terminations and Retirements for a selected date range Action code = RET or TER Action, Effective or Termination within selected date range