HRMS Reports

**Custom Campus Mailing and Email List**  
Allows units to create and customize campus mailing and e-mail lists for dissemination of materials to U of MN faculty and staff.

**Degree and Honors**  
Displays degrees and honors tracked for employees in the PeopleSoft system. (Academics are required to provide educational background prior to hire, but HRMS records degrees and honors for any employee who chooses to provide the information.)

**Employee Current Jobs and Related Information**  
Displays comprehensive data on an individual employee's current active jobs; active combo code and account strings, degrees and honors, training, University contact information, and vacation, sick, and comp information.

**Employee Job History**  
Displays all rows of data (current and history) per employment record for an individual employee. An excellent report for analyzing the history of an individual.

**Employee Review Tracking**  
Displays current, historical, late and pending performance reviews entered into PeopleSoft by departments. An excellent report for monitoring who has performance reviews due.

**Entry Activity**  
Displays job data entered into HRMS for a specified period of time. An excellent report for administrators who need to monitor appointment changes and/or oversee the work of HRMS ACES.

**Job Code Average Salary**  
Allows users to enter or select a job code(s) and view the average salary university wide or by college. One of the most popular UM reports available.

**Leaves**  
Displays current, historical and future paid or unpaid leave information.

**New Hires and Transfers In**  
Displays list of new employees in the unit(s) since a specified date. A good report for identifying who may need orientation materials etc.

**Notice of Appointments**  
The Notice of Appointment report displays current, historical and future dated appointments for employees who have academic professional/administrative and faculty appointments.

*(Note: The highlighted reports are the ones most frequently used.)*
**Personnel Basic Information**
Allows users to view personnel information by individual or employee group. Provides links to related detail information for the group. Similar to the Personnel Detail Information report with a few less categories.

**Personnel Detail Information**
Allows users to view detailed appointment information by individual or employee group. Can create a comprehensive report on groups of employees by job codes, status, entry date, comp rate etc.

**Position Management Organizational Charts**
Allows users to view positions and their hierarchical structure by supervisor position or unit.

**Position Management Position List**
Allows users to view a list of positions for a group of or a single department. Contains incumbent information as well as supervisor name and title.

**Position Management Vacant Position List**
Provides users with a list of vacant positions for one or many departments. Allows users to see previous incumbents and supervisor information.

**Step Discrepancies (Off Step and No Step)**
The Step Discrepancies report allows you to audit data entered into HRMS for bargaining unit employees who are:
- Off step (comprate/step in PeopleSoft is not equal to the negotiated comprate/step)
- No step (step = 0)
An important report for administrators to monitor.

**Terminations and Transfers Out**
Displays a list of employees who have left the University or a University unit due to termination, retirement, layoff or transfer. Generally paired with the New Hires and Transfers in report.

**Training History**
Displays the courses which are tracked in the HRMS which have been taken by a single employee or a group.

**University Contact Information**
Provides campus contact information for current unit personnel including office location, phone, mailing address and e-mail address.

**Vacation Payout by Area Class (Historical until 2008)**
Provides a summary of vacation dollars paid out by the University to employees who have terminated or dollars transferred to departments due to an employee transfer. Provides drill through to area and area-org detail. (Report went through 2008 and was not updated following EFS Conversion.)

**Vacation, Sick and Comp Balances**
Displays current sick, vacation and compensation time for an employee or department. This report includes balances, liabilities, hours used, comprate and hours away from vacation max accrual.

(Note: The highlighted reports are the ones most frequently used.)
Payroll Reports

**Biweekly Overtime Report With YTD Totals**
Displays the overtime paid for the current pay period as well as the fiscal year to date totals. It does not include payroll adjustments.

**Current Month YTD Encumbrance Payroll Summary**
Displays current month, year-to-date and encumbered payroll for either one EMPLID or selected Area, Funds, Sponsored or Non-sponsored accounts. This report includes payroll adjustments. It is refreshed monthly (similar to accounting fiscal close calendar).

**Employee Multi Year Payroll Detail**
Allows you to display payroll detail across fiscal years for one employee. You can customize the report to look at salary and/or fringe and optionally view payroll adjustments. You can choose to view one pay period or multiple pay periods and one account string or multiple account strings for fiscal years 2001 to present.

**Employees with Change of Status in Pay Period**
This report prompts for department and current pay period and displays employees who have had a status change on their job record during that pay period. An excellent report for monitoring payroll activity.

**Pay Change Report**
Displays employees whose pay amount has changed, when comparing it to the previous pay period. An excellent report for monitoring compensation changes.

**Payroll Transactions**
Displays salary fringe, HSA, work study etc. for current or previous two years, either for one emplid or transaction number.

**Pre-Payroll Distributions**
This report is intended to be used as a tool to estimate current and future salary payments and payroll distributions for employees whose status is active or on paid leave. The report combines job and payroll distribution data and lists payroll distributions for current and future pay periods as well as the current pay period’s pay entry amounts. A critical report for individuals whose job is to monitor payroll and want information prior to the payroll abstract.

**Salary Fringe Detail by Pay Period**
Displays the distributions and amounts for salary and fringe charges for the pay period selected, by area- or by department.

**Salary Distribution**
The report displays salary adjustments for the selected fiscal year or effort period. It displays the distribution of salary and calculates the percent of salary paid on each account. This is a useful tool for the effort certification process.

**YTD Employee Distributions**
Displays employee salary and fringe distributions to date. This report does not include payroll adjustments.

(Note: The highlighted reports are the ones most frequently used.)
Work Study

Employed Students with Maxed Work Study Awards and Unmet Needs
Displays students who have used up their work study awards, but may still have eligibility to increase their award amount according to the parameters used by the Financial Aid Office. This Report requires access to private student data.

Employed Students with Unused Work Study Awards (Fall/Spring)
Identifies employed students who have work study awards which are not being used. This Report requires access to private student data.

Work Study Reconciliation
The work study report provides information on work study transactions that have been moved from one account to another.

Work Study Reimbursements
Displays students paid work study budget with a summary of pay and adjustments for the account. Calculates the percent of reimbursement received and displays the expected percent reimbursement based on the item type. This Report requires access to private student data.

Collegiate Personnel Plans

Teaching Appointment Plan
This report displays the planned job codes, corresponding titles, and appointment types that the college said would hire in the collegiate personnel plan. This report is used as a reference against the Teaching Appointment Summary report.

Teaching Appointment Summary
This report displays actual job codes, corresponding titles, and appointment types hired in the college as compared to the planned job codes, titles and appointment types that the college said they would hire in the collegiate personnel plan (refer to Teaching Appointment Plan report).

Teaching Supplemental Plan Summary
Each college, entity (if >=FY09), or department summary of total FTE by employee group e.g. Tenured, Contract, Grad Asst. etc.
EOAA Reports

Availability Data for Faculty by Department
This document provides a list of sources used by the EOAA Office to determine Faculty availability as reflected in the Faculty Goals reports.

Description of Employee Racial/Ethnic Category, Citizen Status, Disability Status and Veteran Status
This concise document summarizes the University’s responsibilities for data collection, then provides definitions and commentary helpful in the interpretation of the Workforce sections of the EOAA reports.

EOAA History Cube
This cube provided point-in-time snapshots of University workforce characteristics.

FCE014-1 Faculty Workforce and Goals by Department
The Faculty goals reports contain department summary counts of workforce, availability and goals by tenure status, gender, racial/ethnic group and residency status.

FCCE015-1 Civil Service Workforce Analysis by Department
This report contains department summary counts by EEO job Group and Job Code, by gender, racial, ethnic group and residency status.

FCE055-1 Civil Service Workforce and Goals by IPEDS/Job Group Code
This report contains college or administrative unit summary counts of workforce, availability, and goals for groups of similarly related job titles, by gender, racial/ethnic group, unknown racial/ethnic group, and nonresident alien.

FCE055-1 Civil Service Workforce and Goals by Campus/IPEDS Job Group Code
This report contains campus level summary counts of workforce, availability, and goals for groups of similarly related EEO job Group Descriptions by gender, racial/ethnic group, unknown racial/ethnic group and nonresident alien.

List of Job Classifications/Titles by IPEDS Category/Job Group
This report is the most up-to-date combined source for HRMS and EOAA job classifications used in UM Reports.

Memorandum: Web Workforce and Goal Reports (EOAA Reports), January 2006
Here is an introduction to all of the EOAA UM Reports, including basic terminology and content, how the reports are created, and how the reports may be used along with EOAA resources to meet staffing goals.

Summary of Academic Non-Faculty Goals
These reports contain University-wide workforce, availability, and goals summaries for similarly related academic administrative and professional employee groups. The “List of Academic (P/A) Numbers and Titles” reports are also available here.