InfoPorte
HR/Payroll Reporting

Part 3

October 21, 2014

Connect CAROLINA

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Welcome

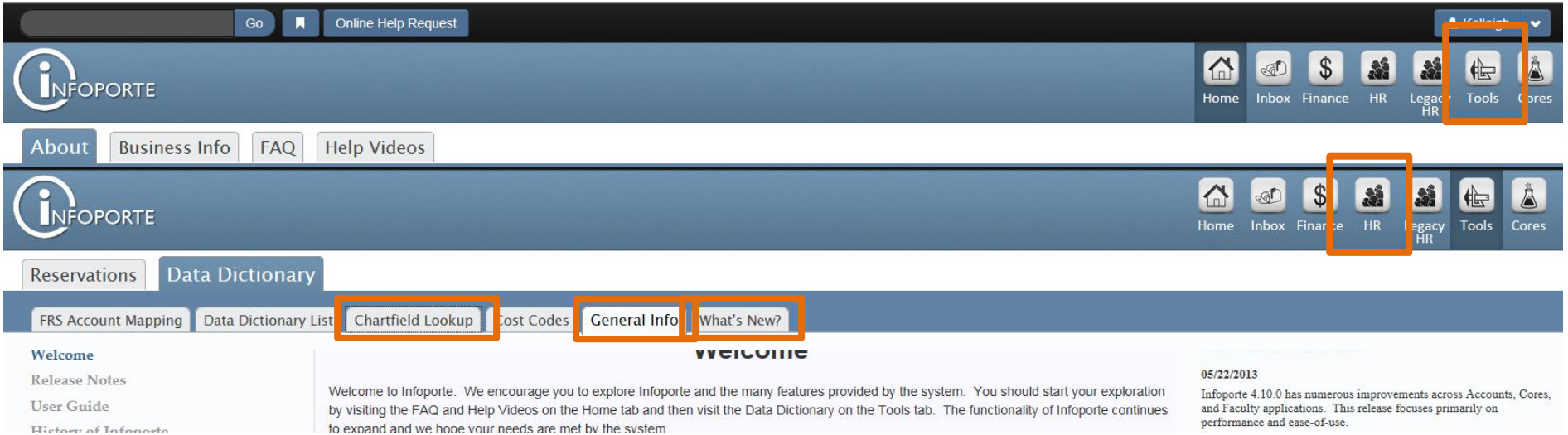
Connect CAROLINA

Day	Topics
1	• Managing Transactions • Budget Inquiry
2	• Financial Reports: InfoPorte
3	• Using Employee and Position Searches • Payroll Reports • SAS Reporting in InfoPorte

Ground Rules

- Questions
- Schedule
- Accommodations
- Cell phones

InfoPorte: HR/Payroll



Employees Tab

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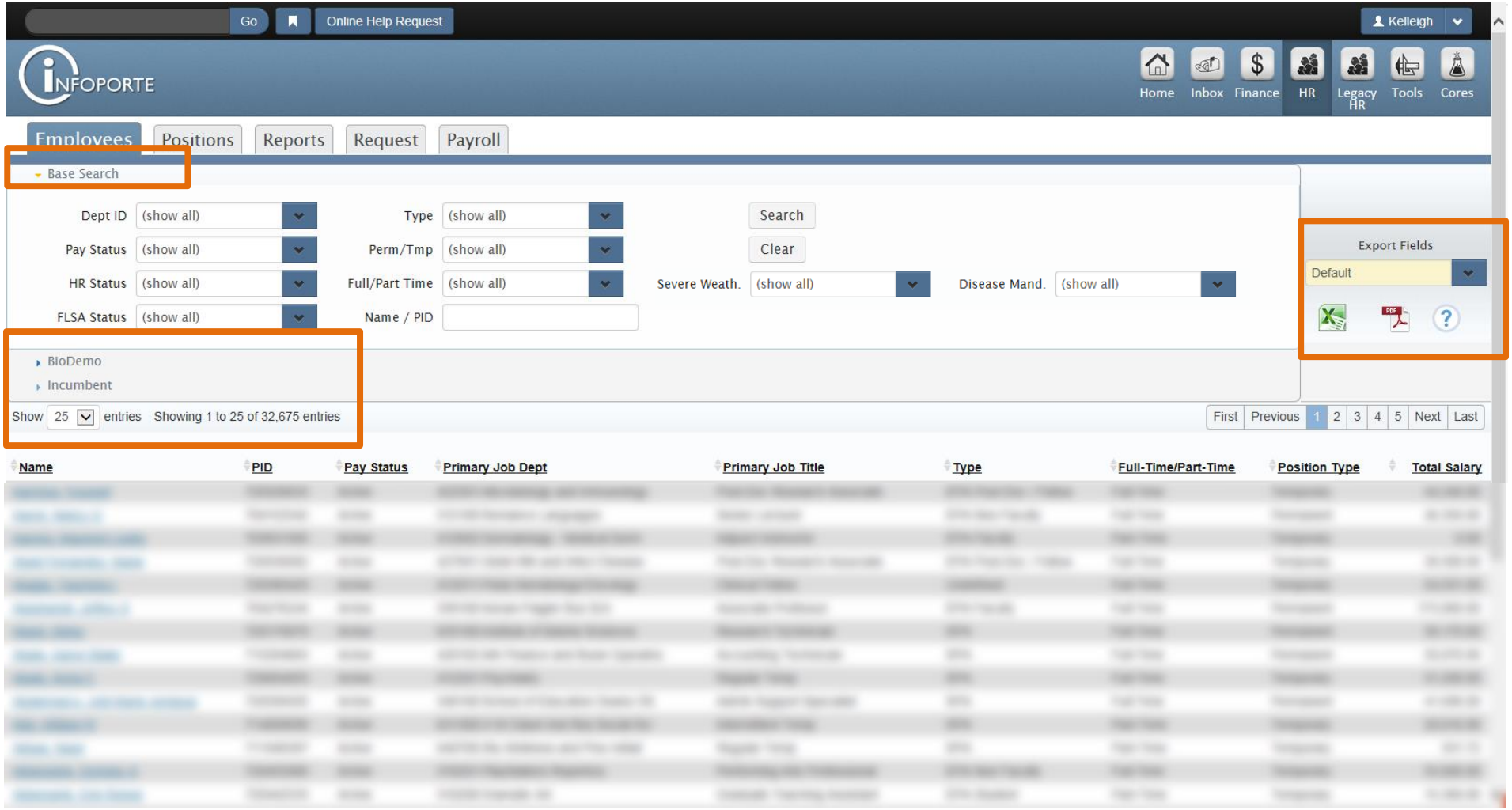
InfoPorte: HR/Payroll



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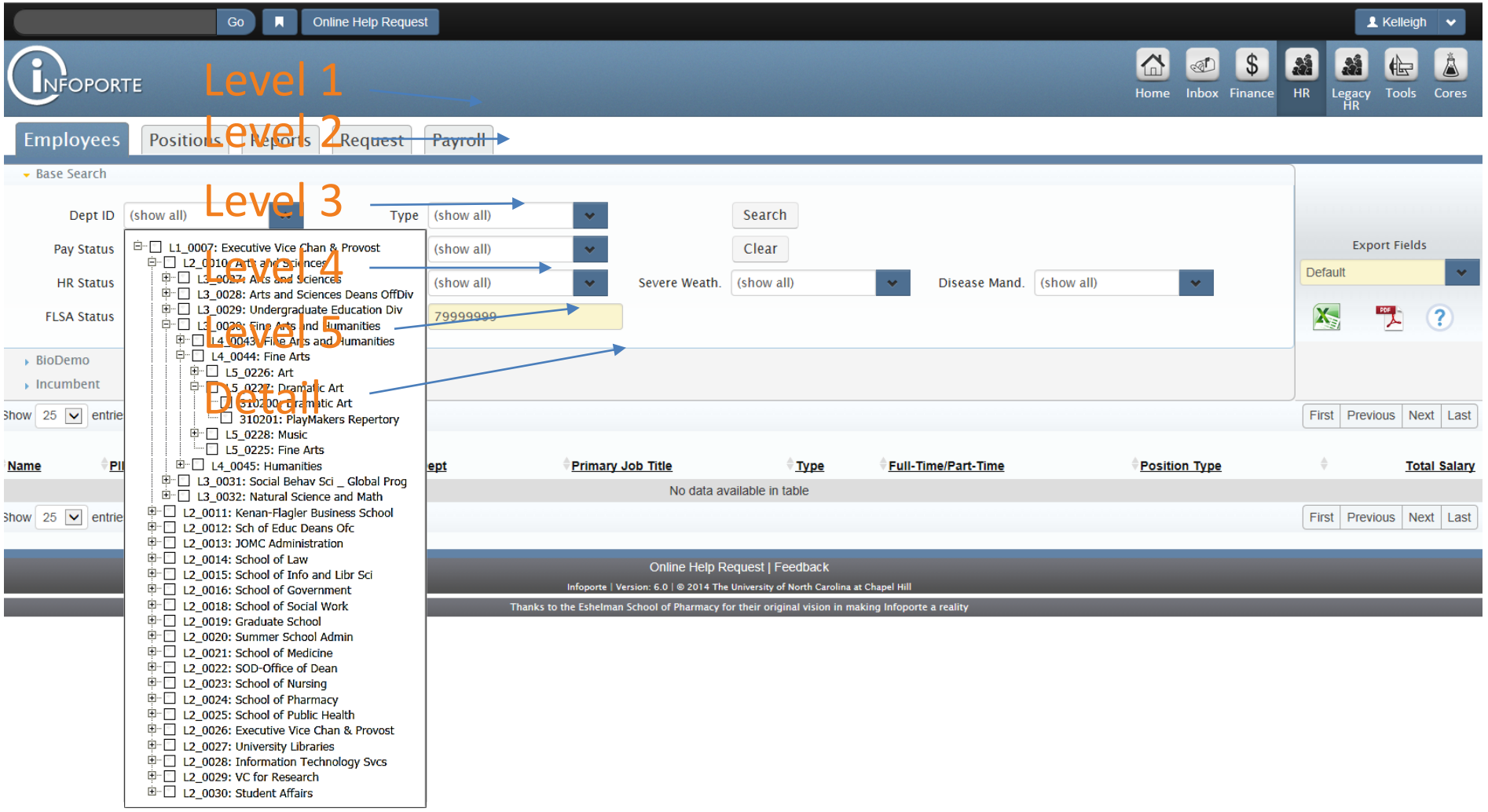
InfoPorte: HR/Payroll



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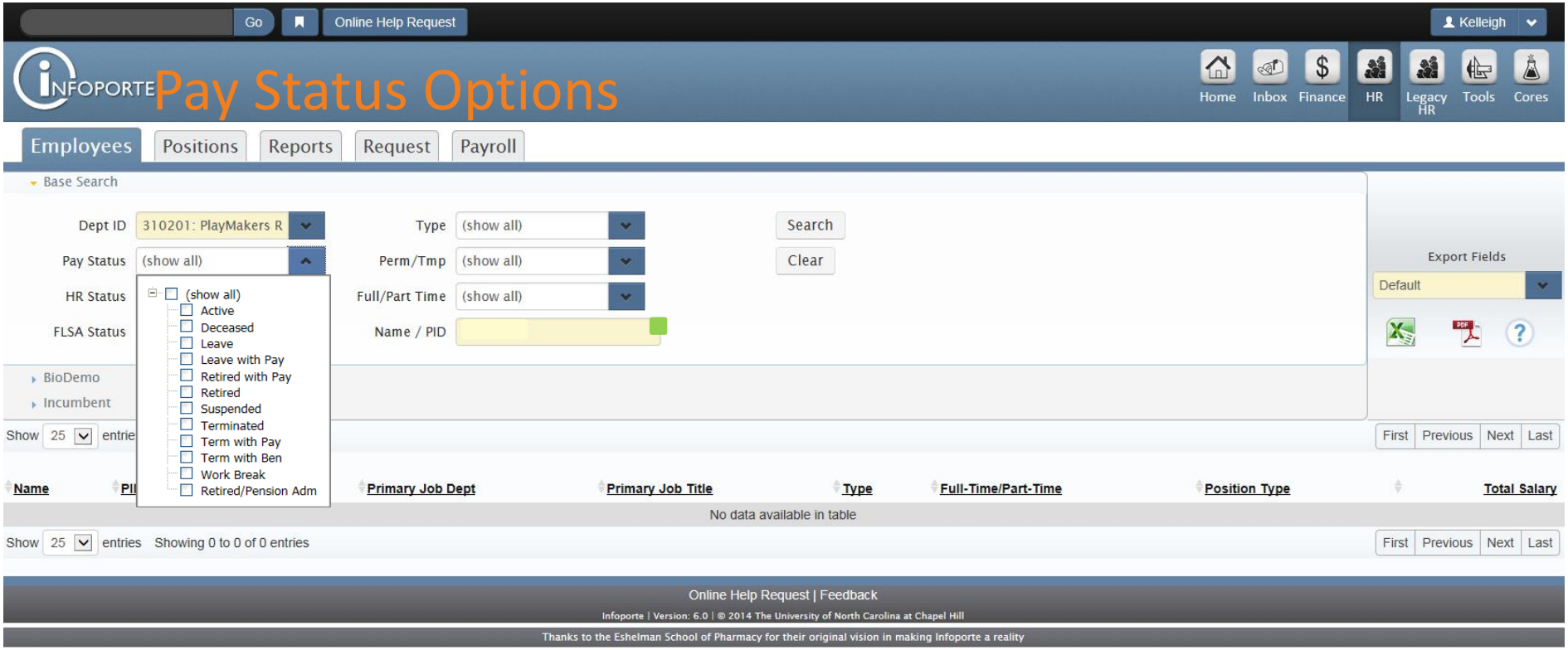

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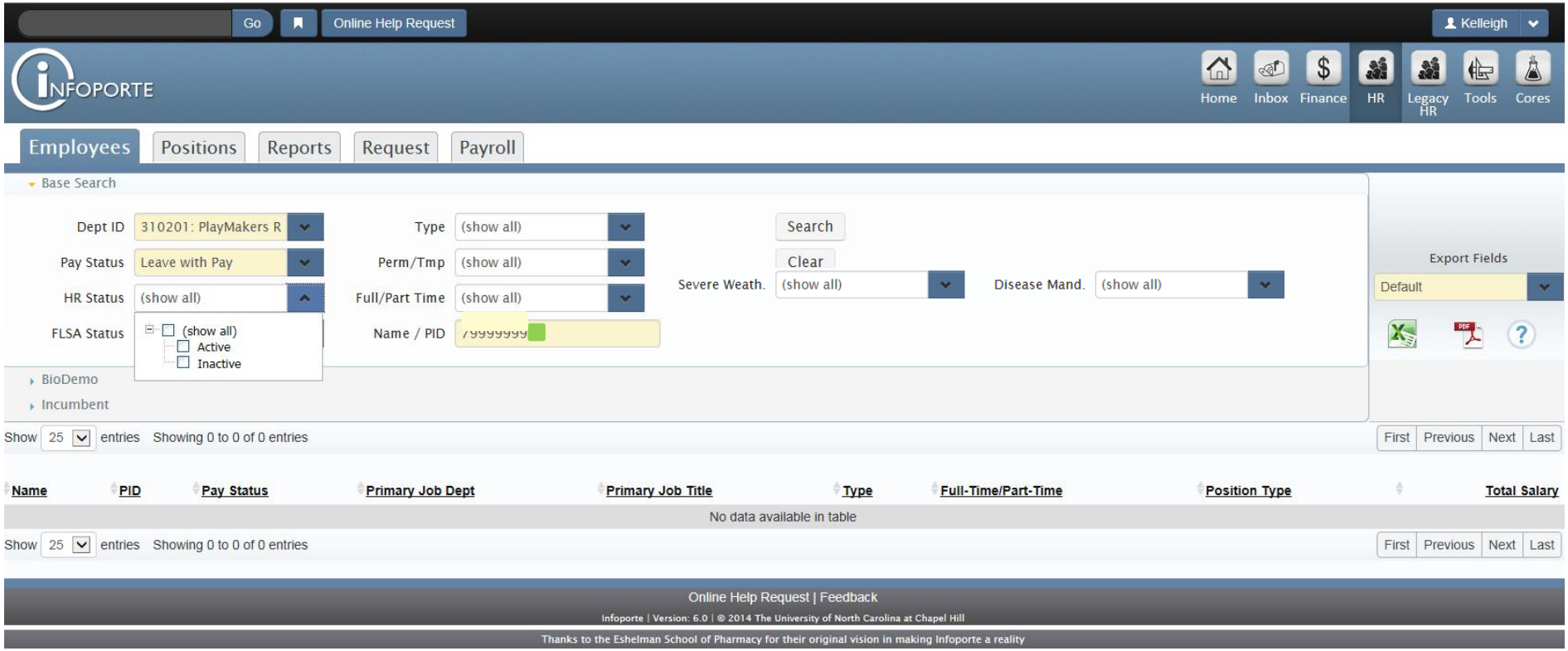

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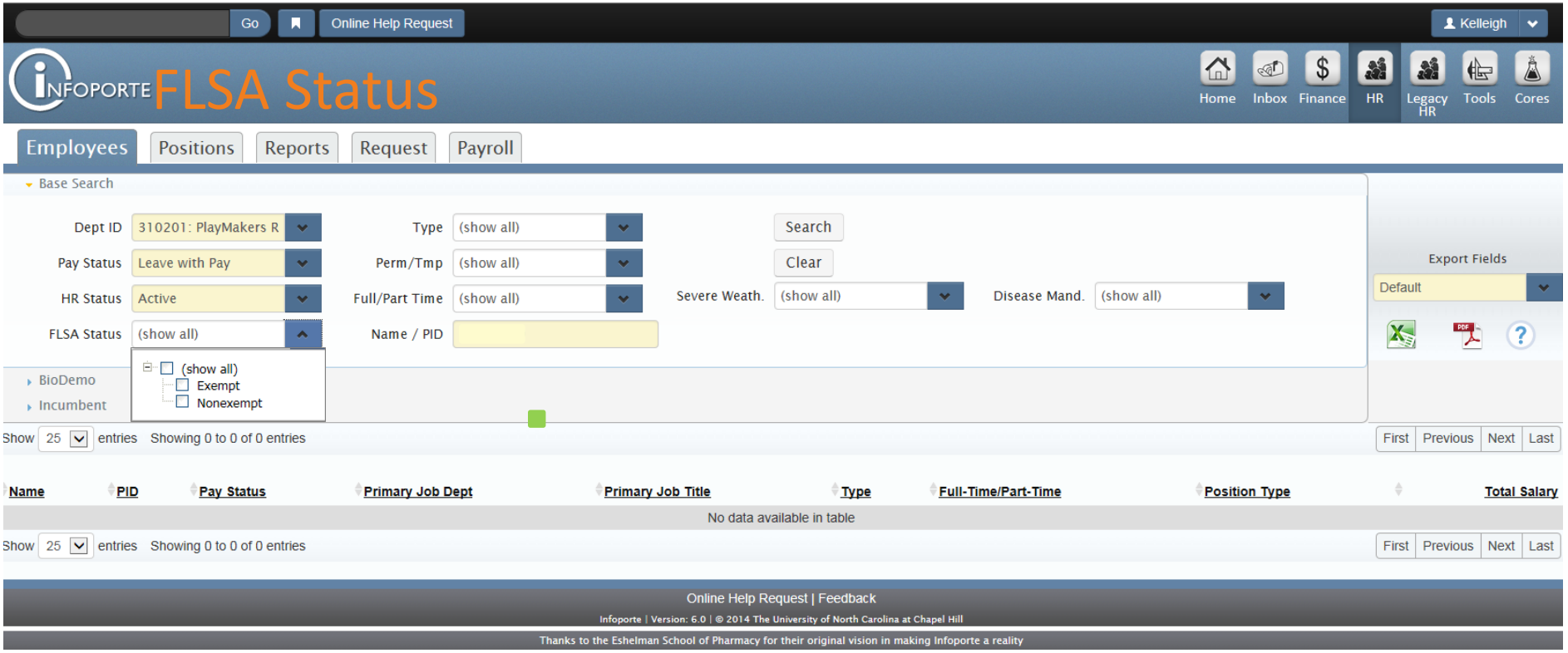

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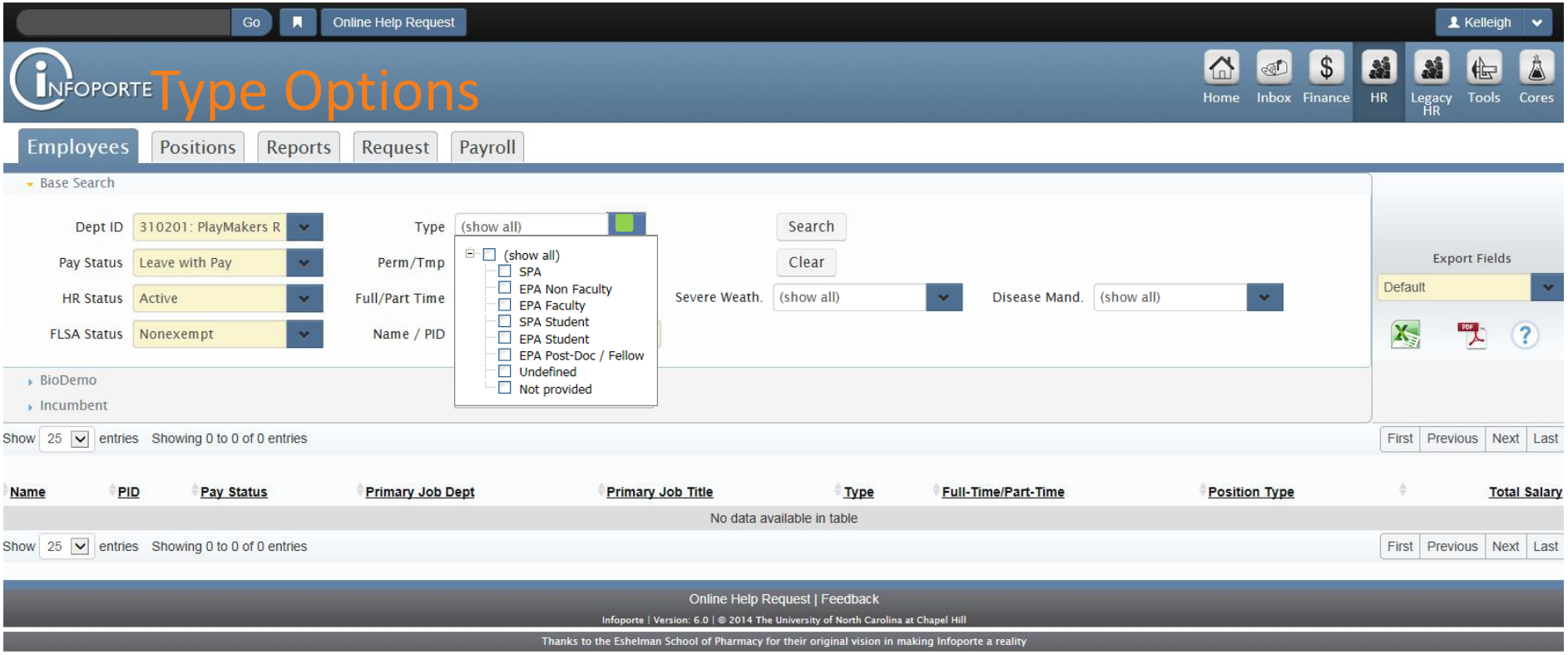

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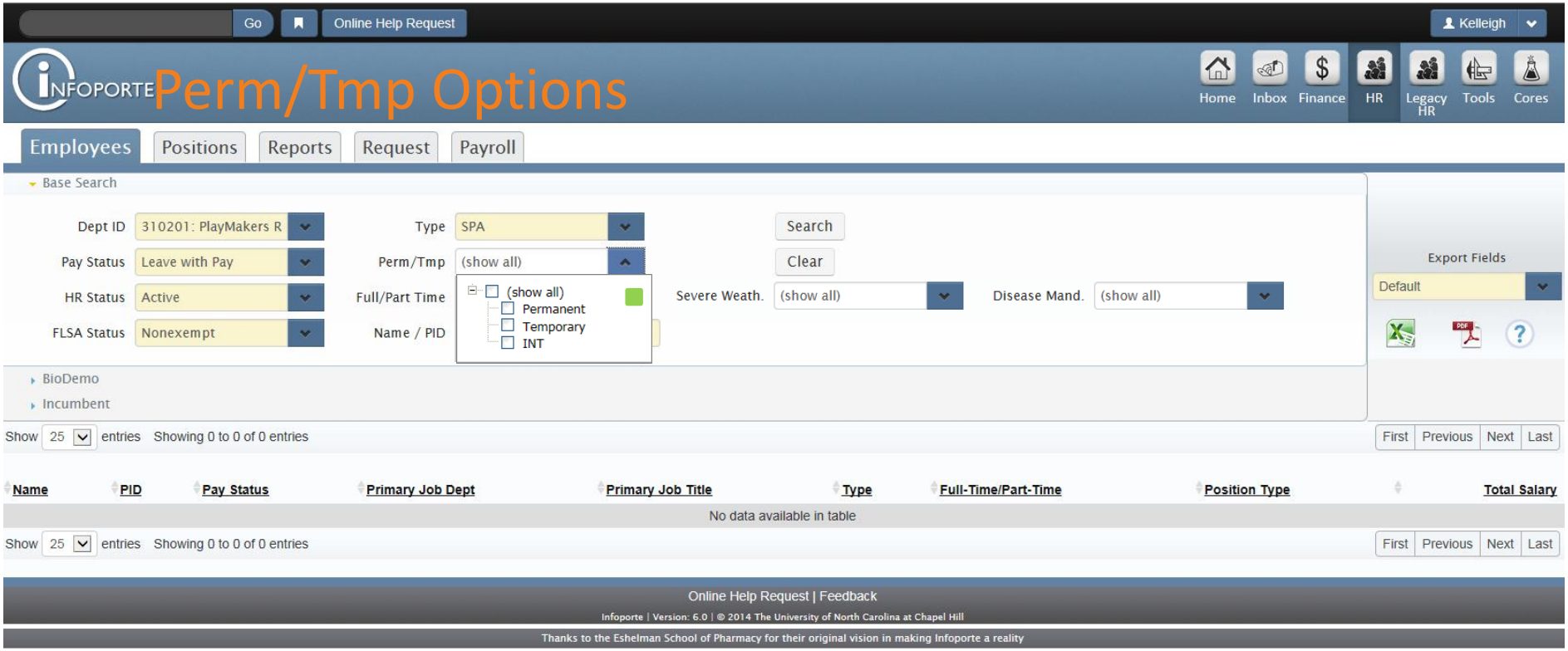

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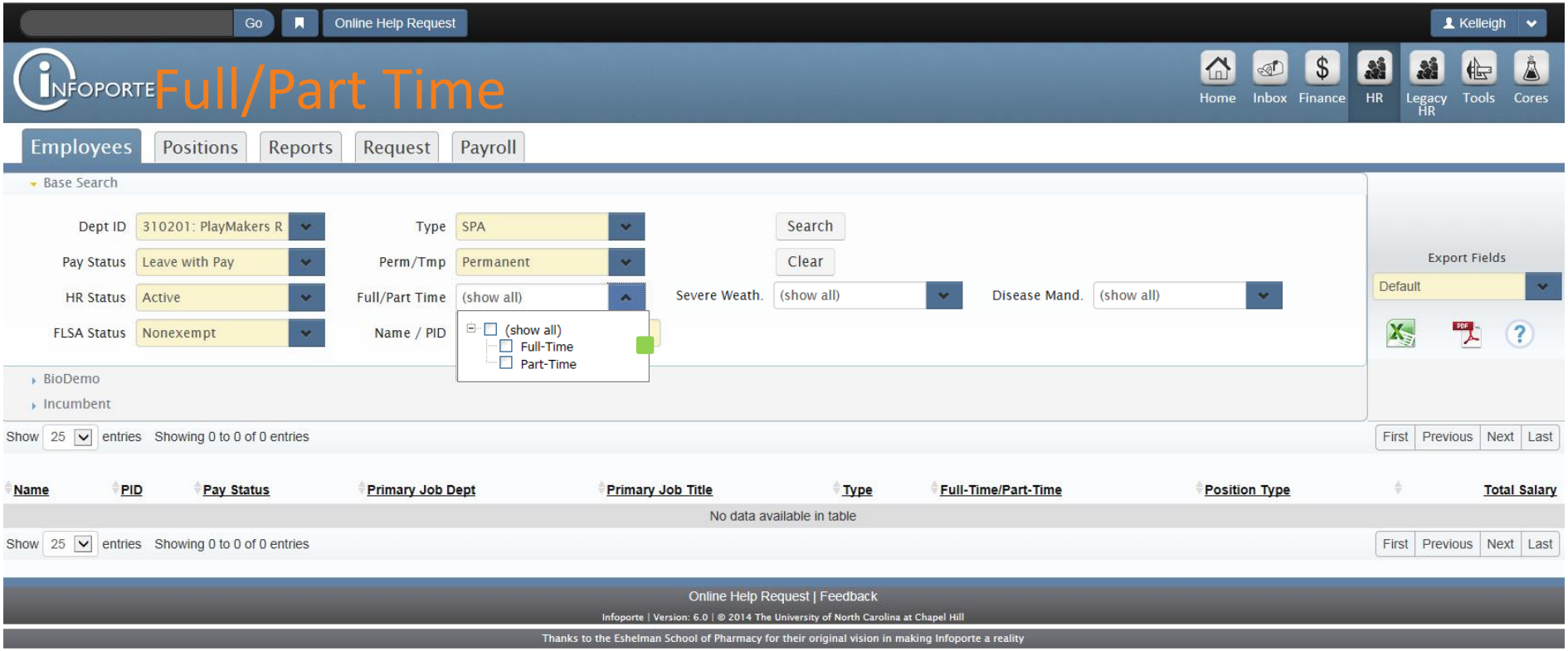
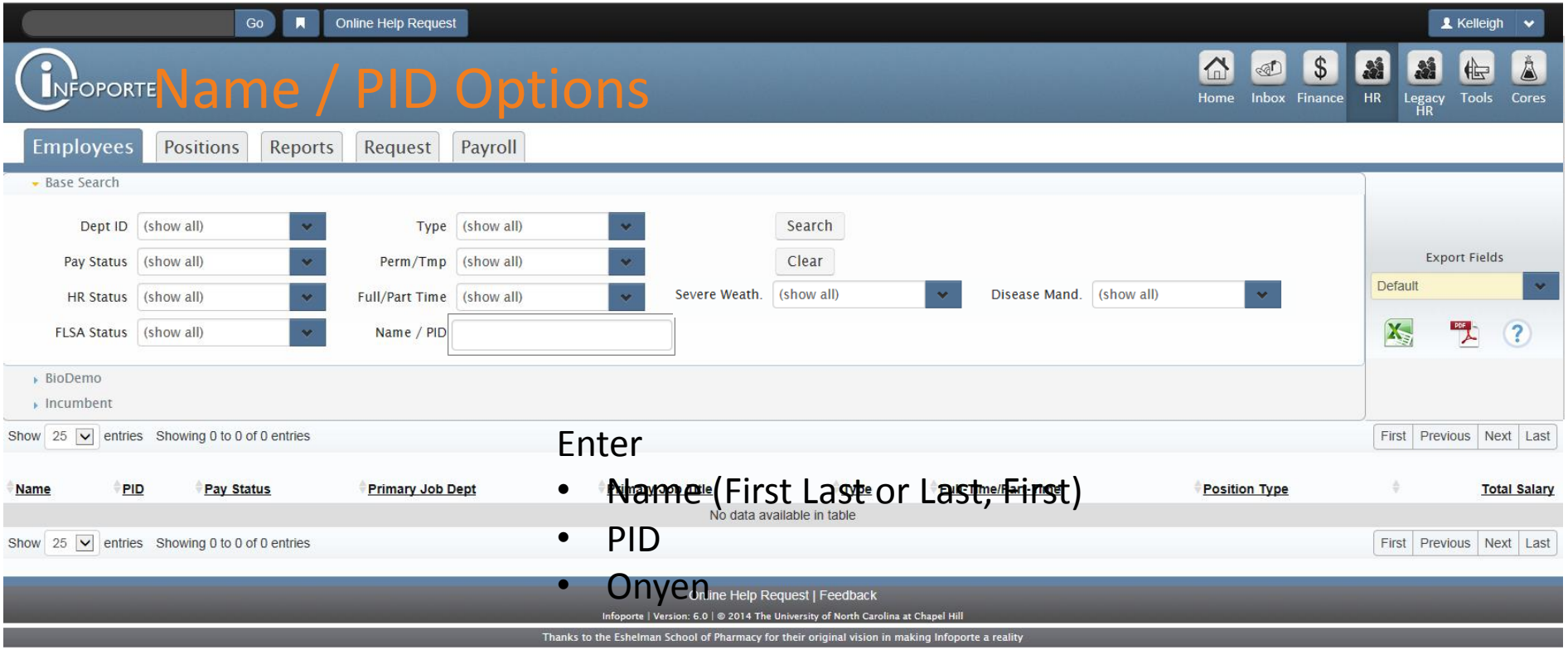
InfoPorte: HR/Payroll



InfoPorte: HR/Payroll



Enter

- Name (First Last or Last, First)
- PID
- Onyen

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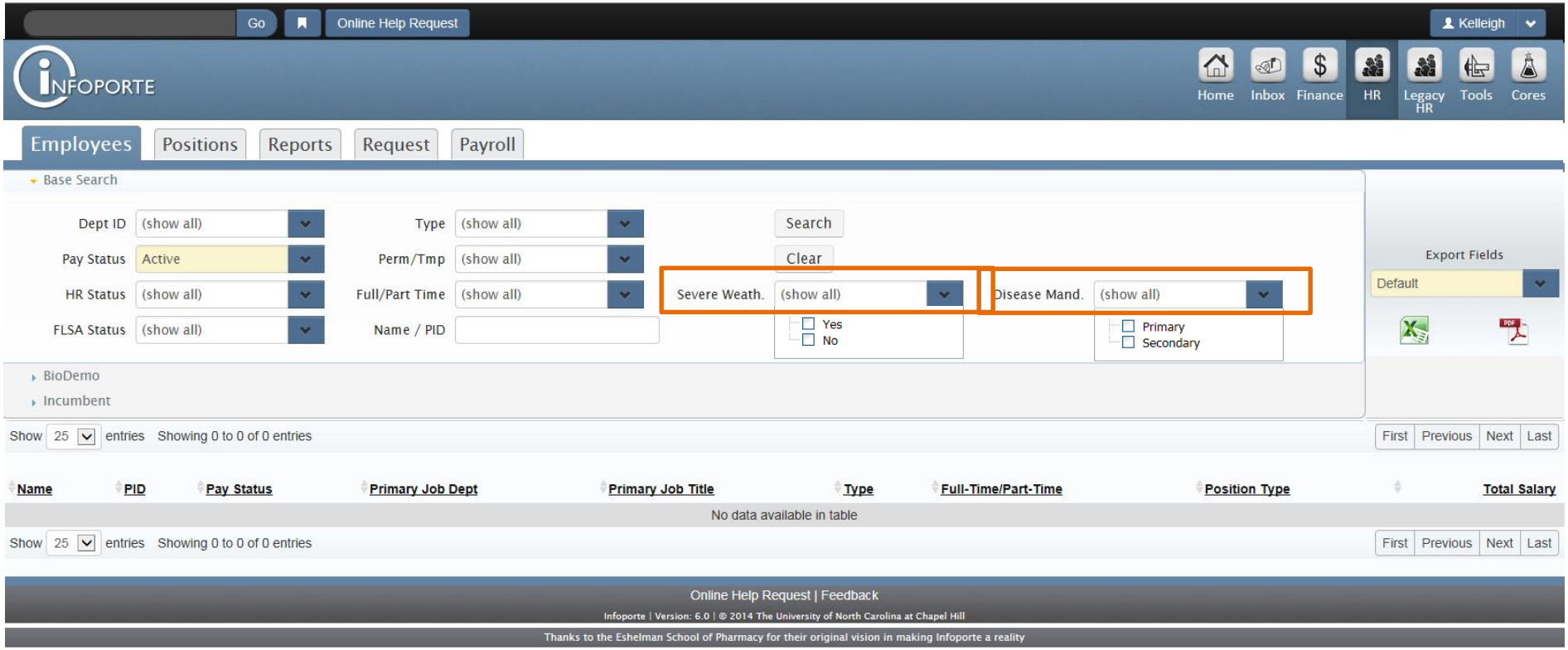

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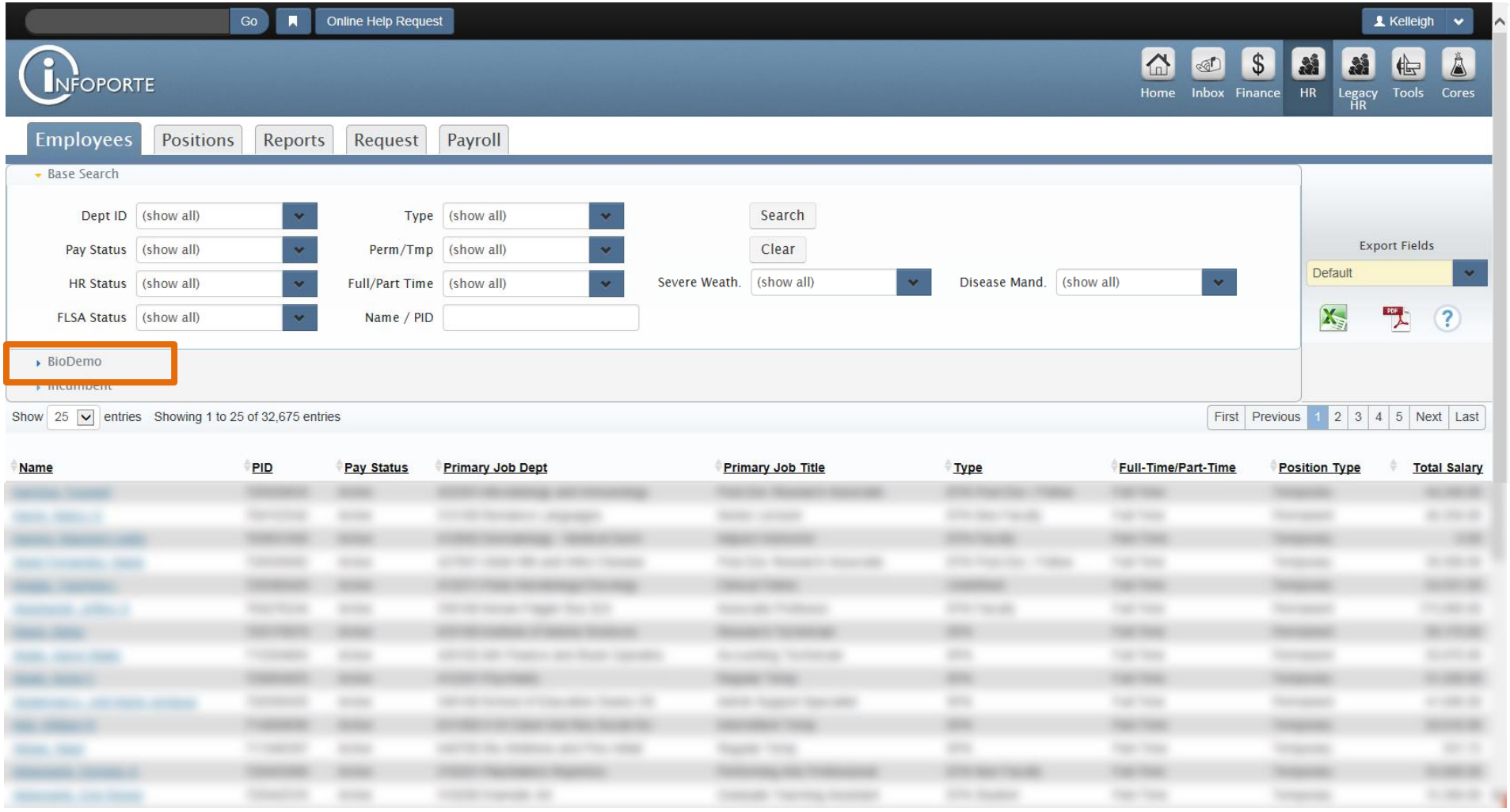
InfoPorte: HR/Payroll



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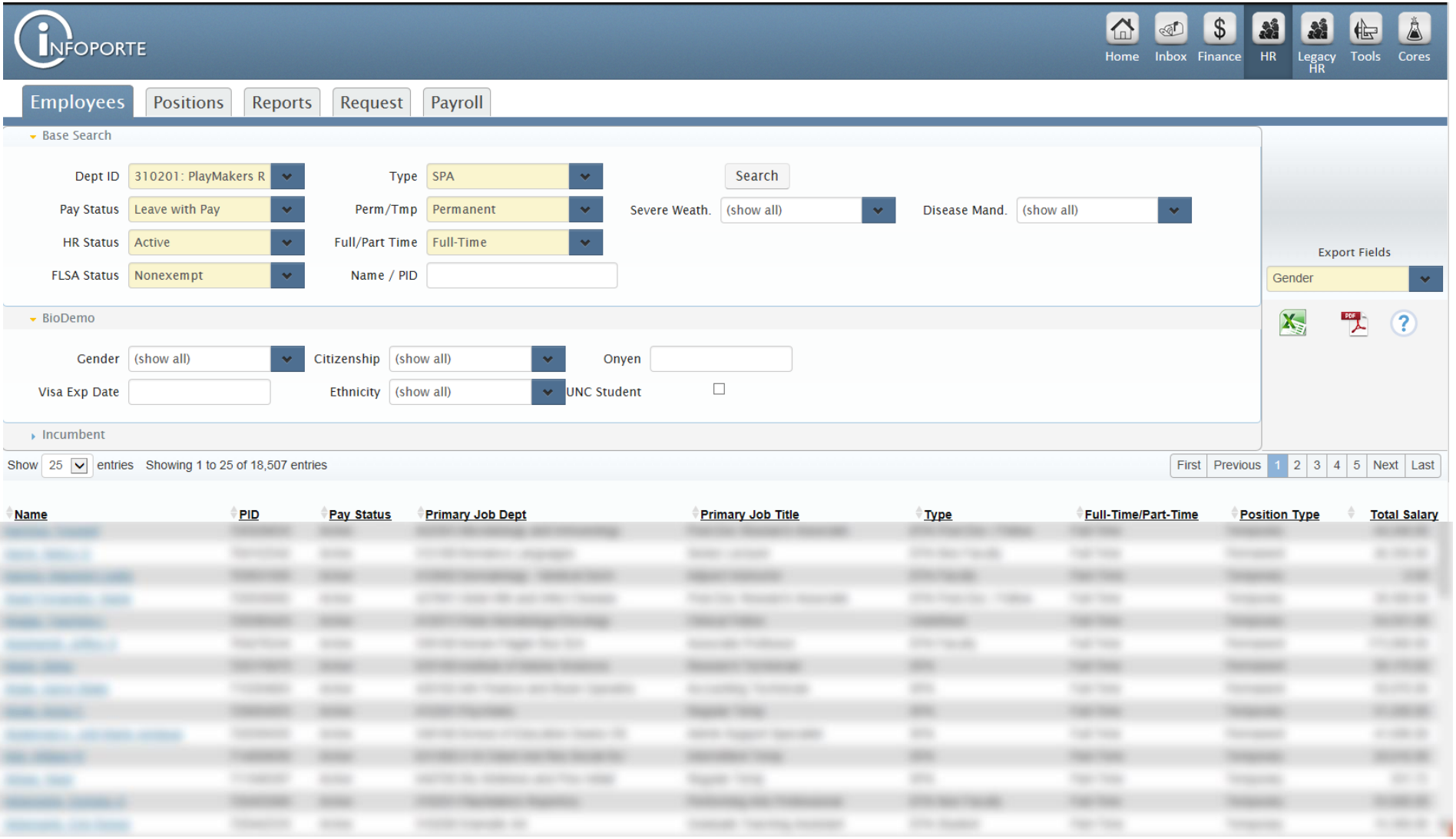
InfoPorte: HR/Payroll



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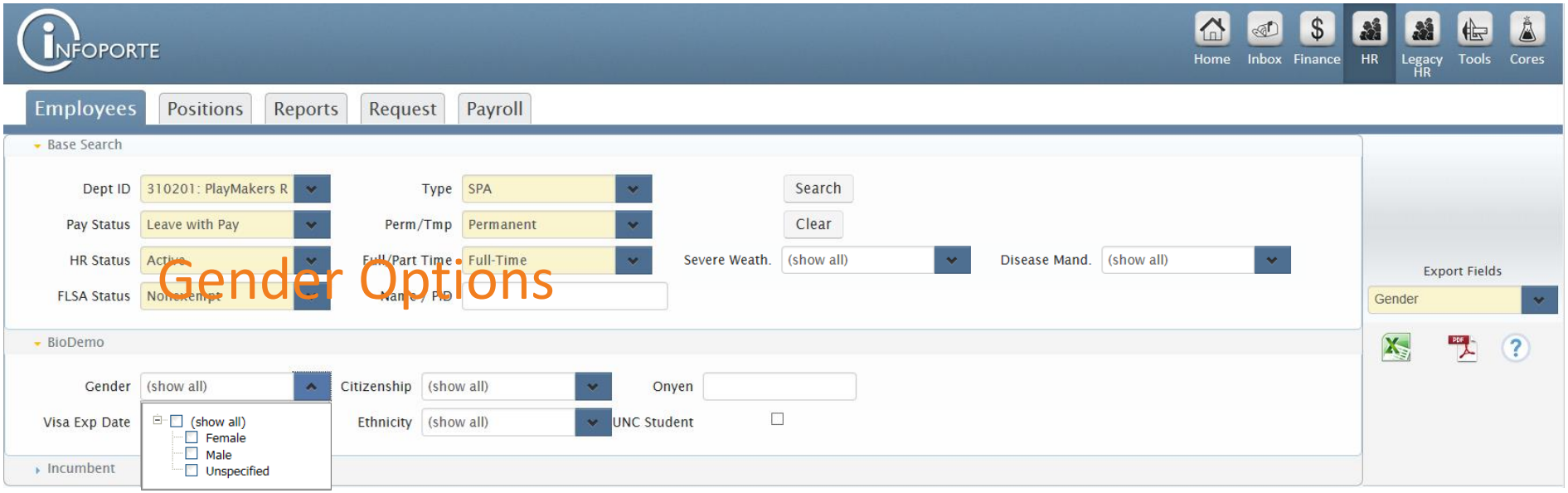

Gender Options

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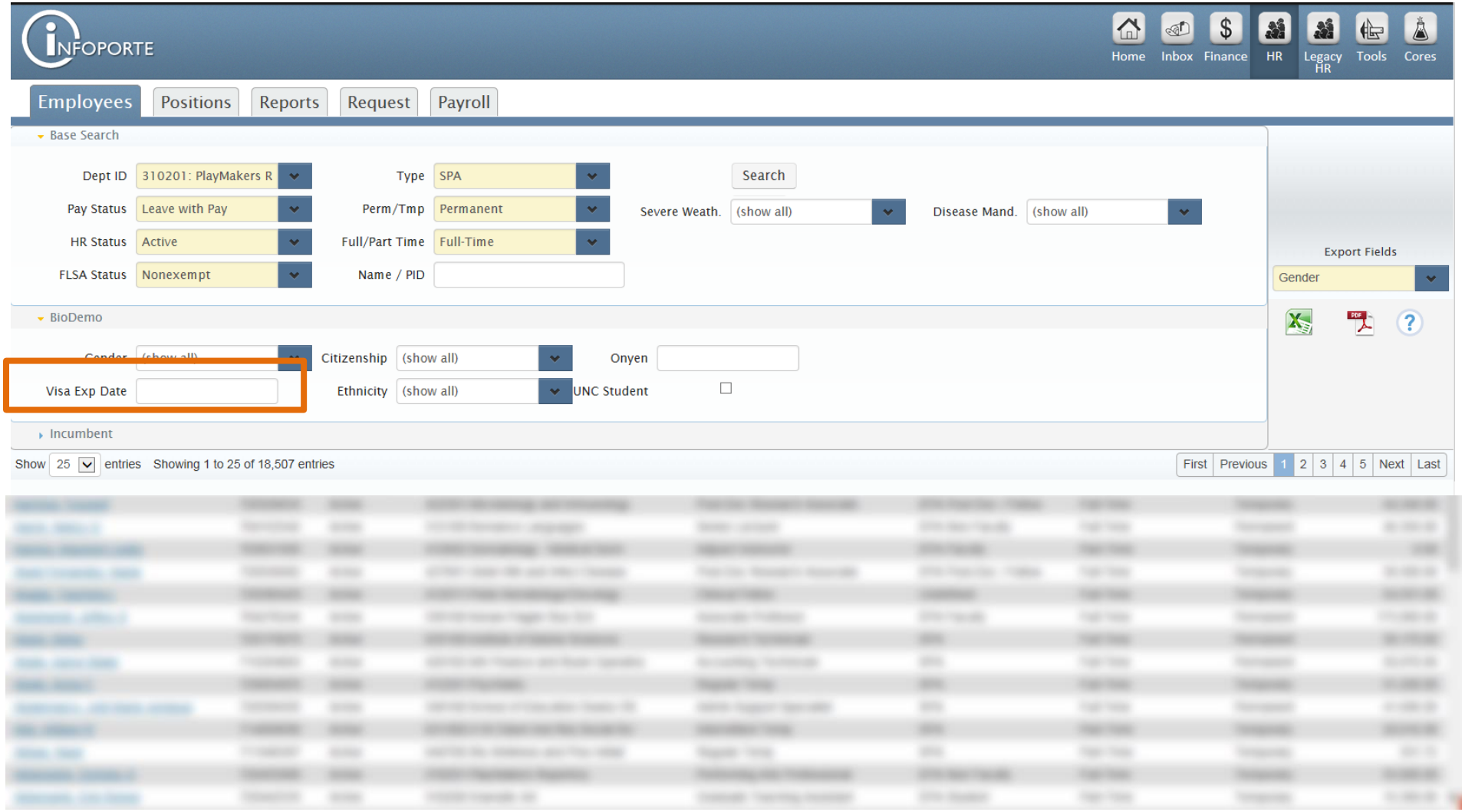

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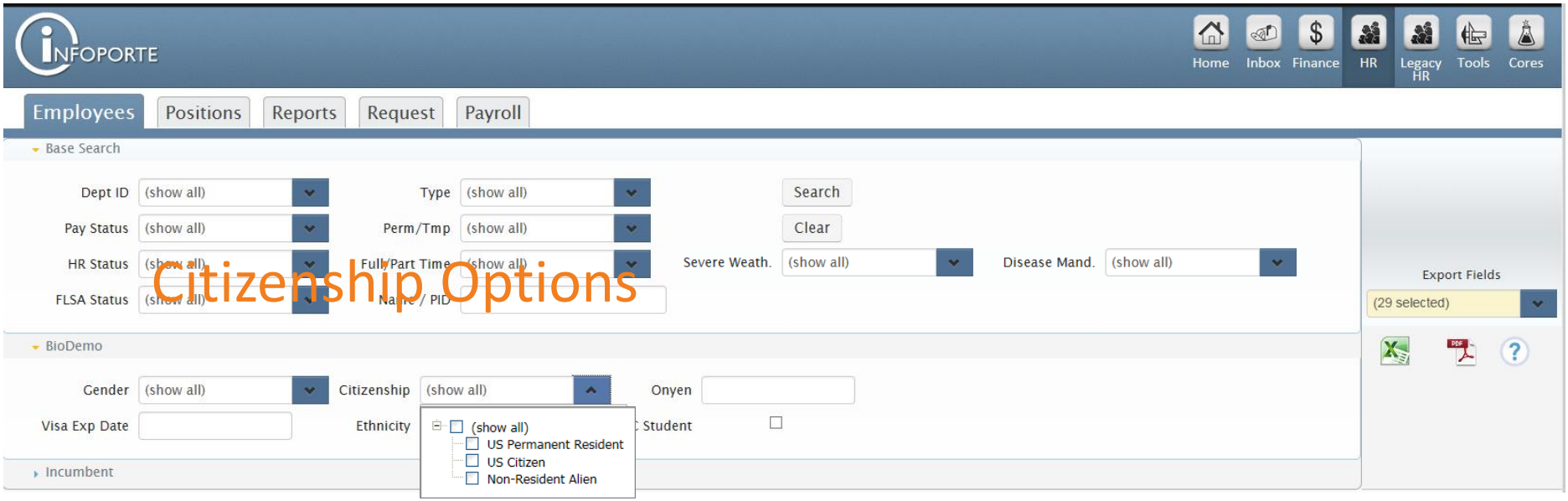
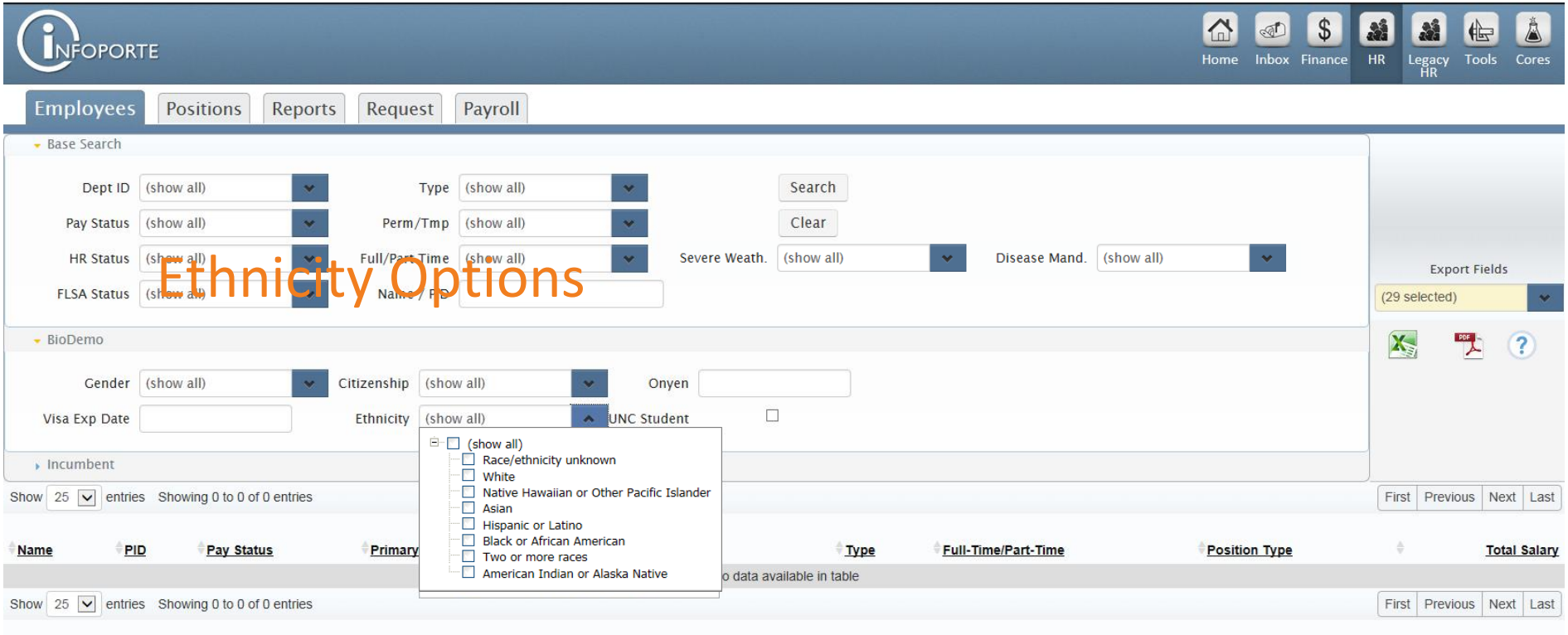


Citizenship Options

InfoPorte: HR/Payroll



Ethnicity Options

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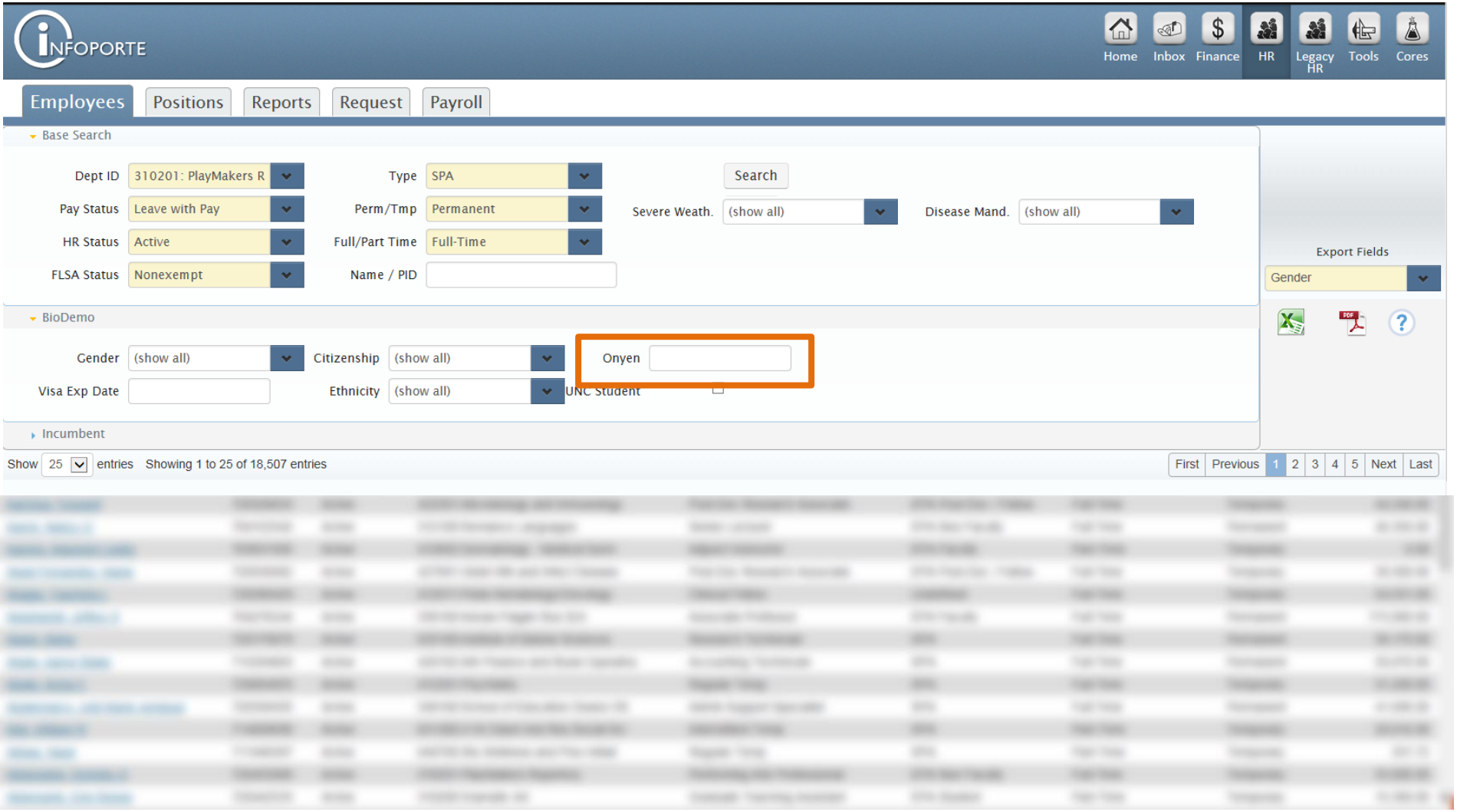
InfoPorte: HR/Payroll



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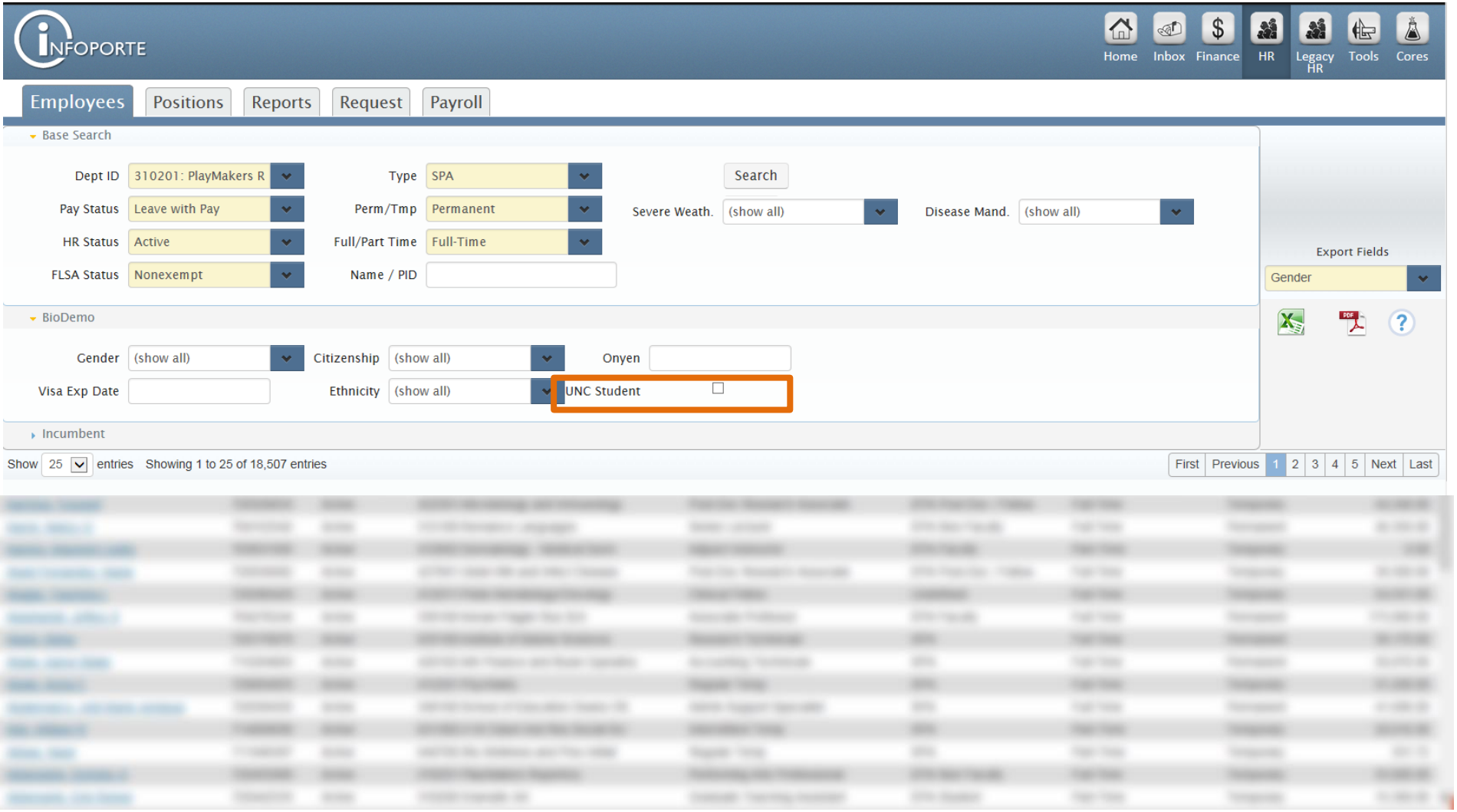
InfoPorte: HR and Payroll



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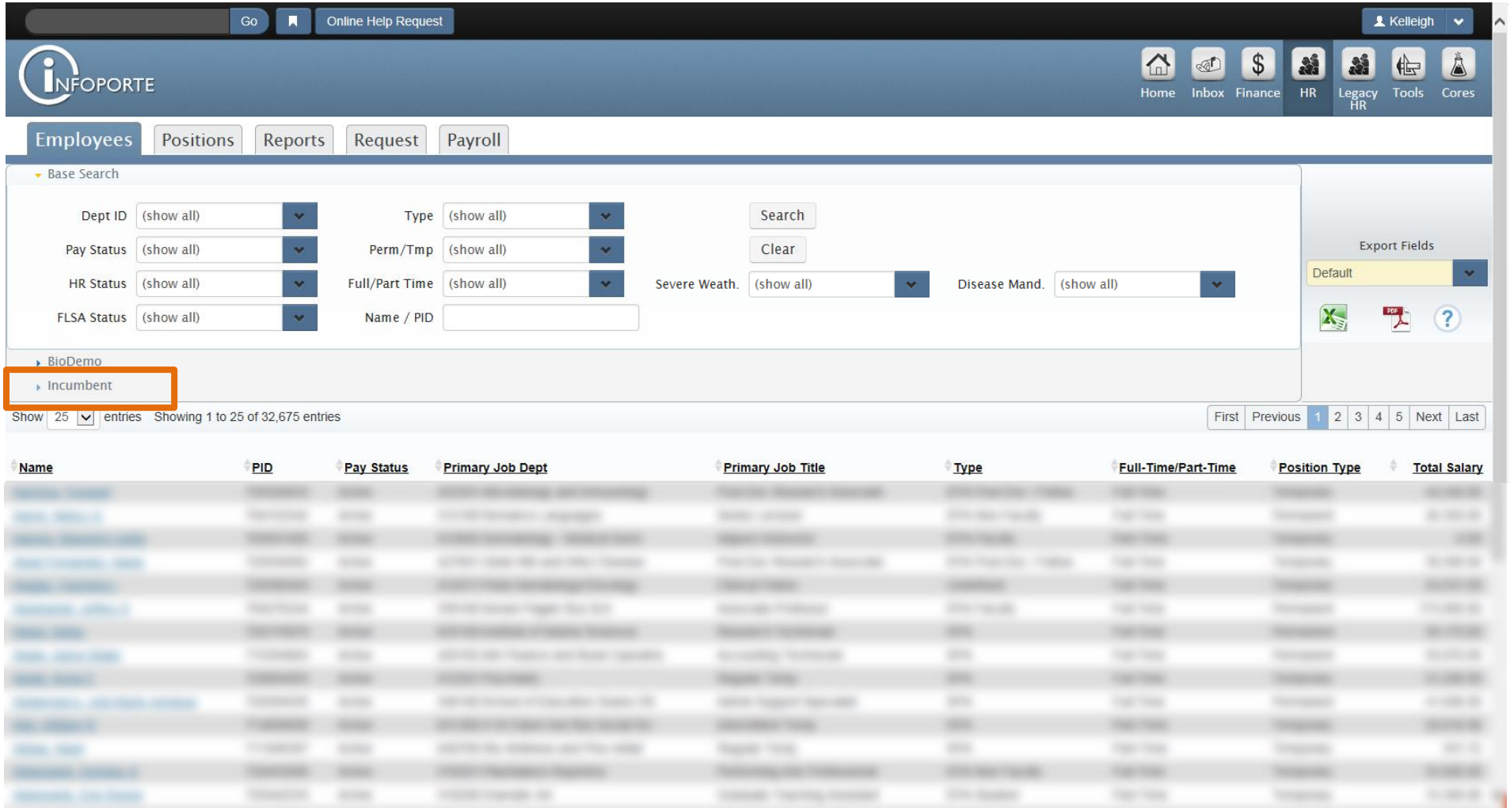
InfoPorte: HR/Payroll



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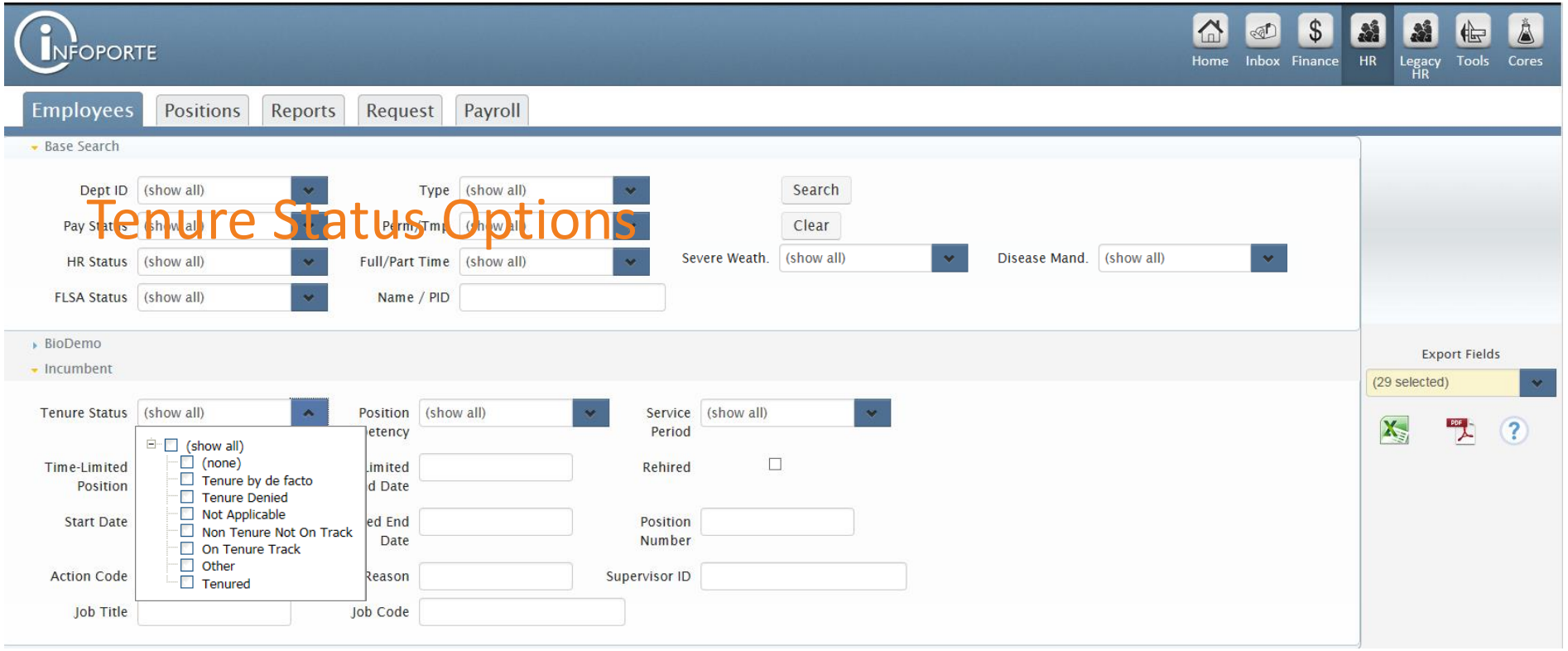

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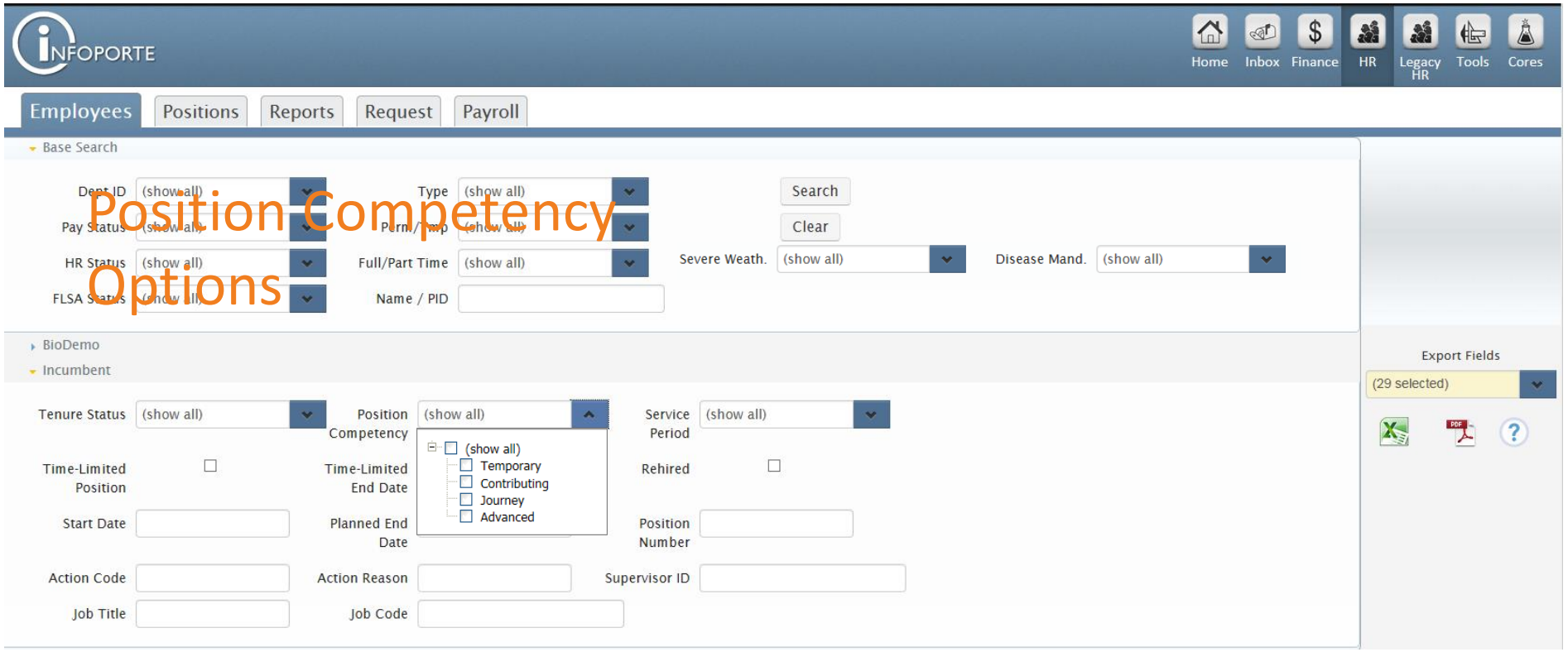

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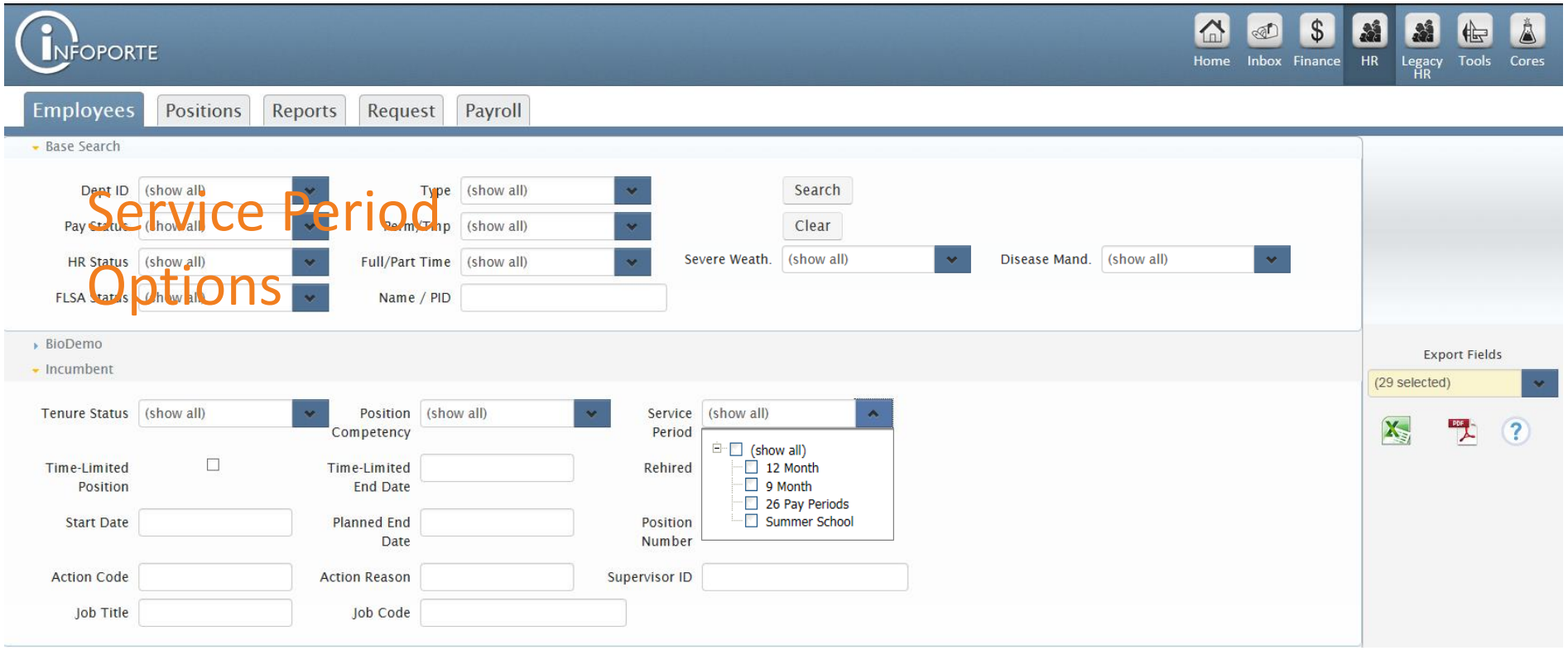

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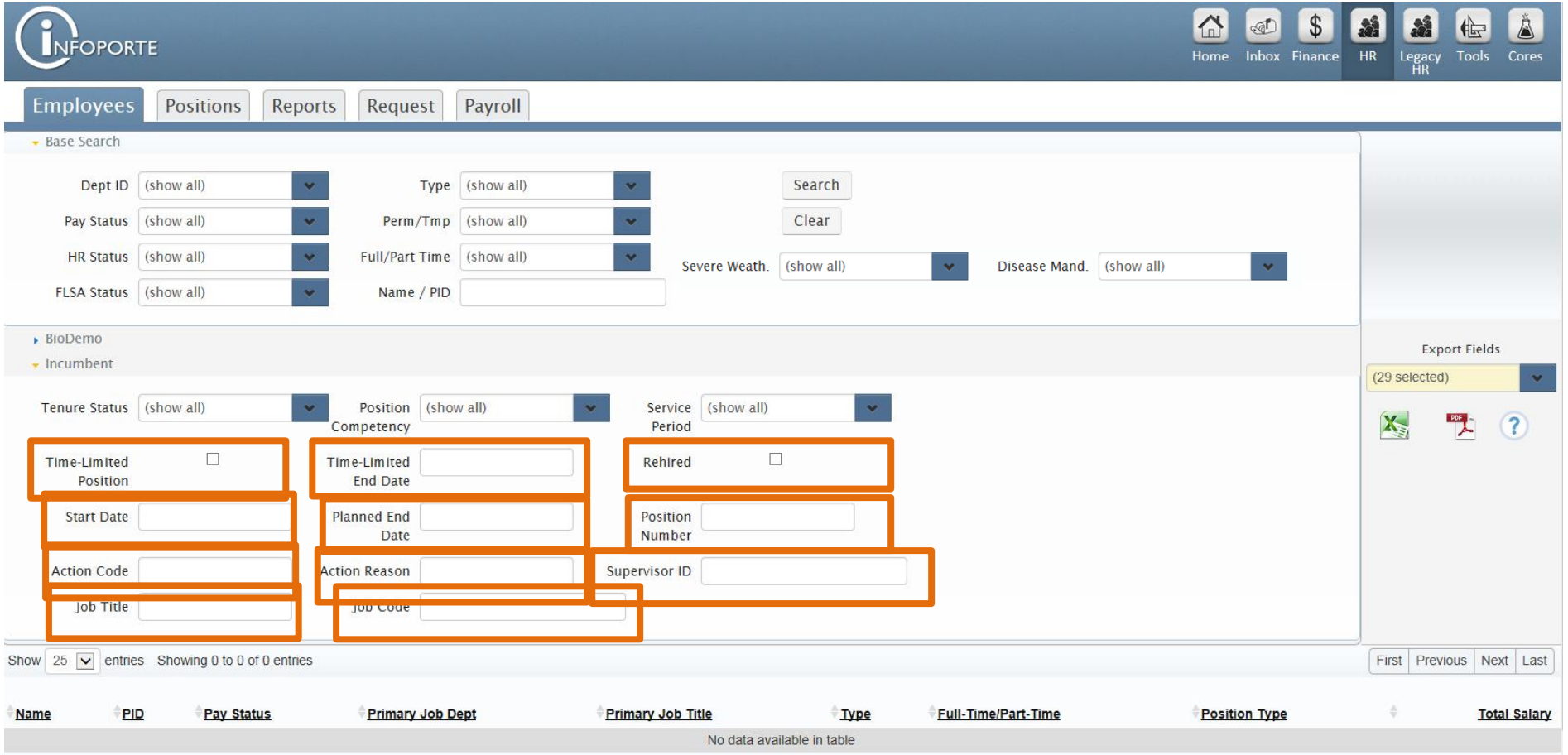
InfoPorte: HR/Payroll



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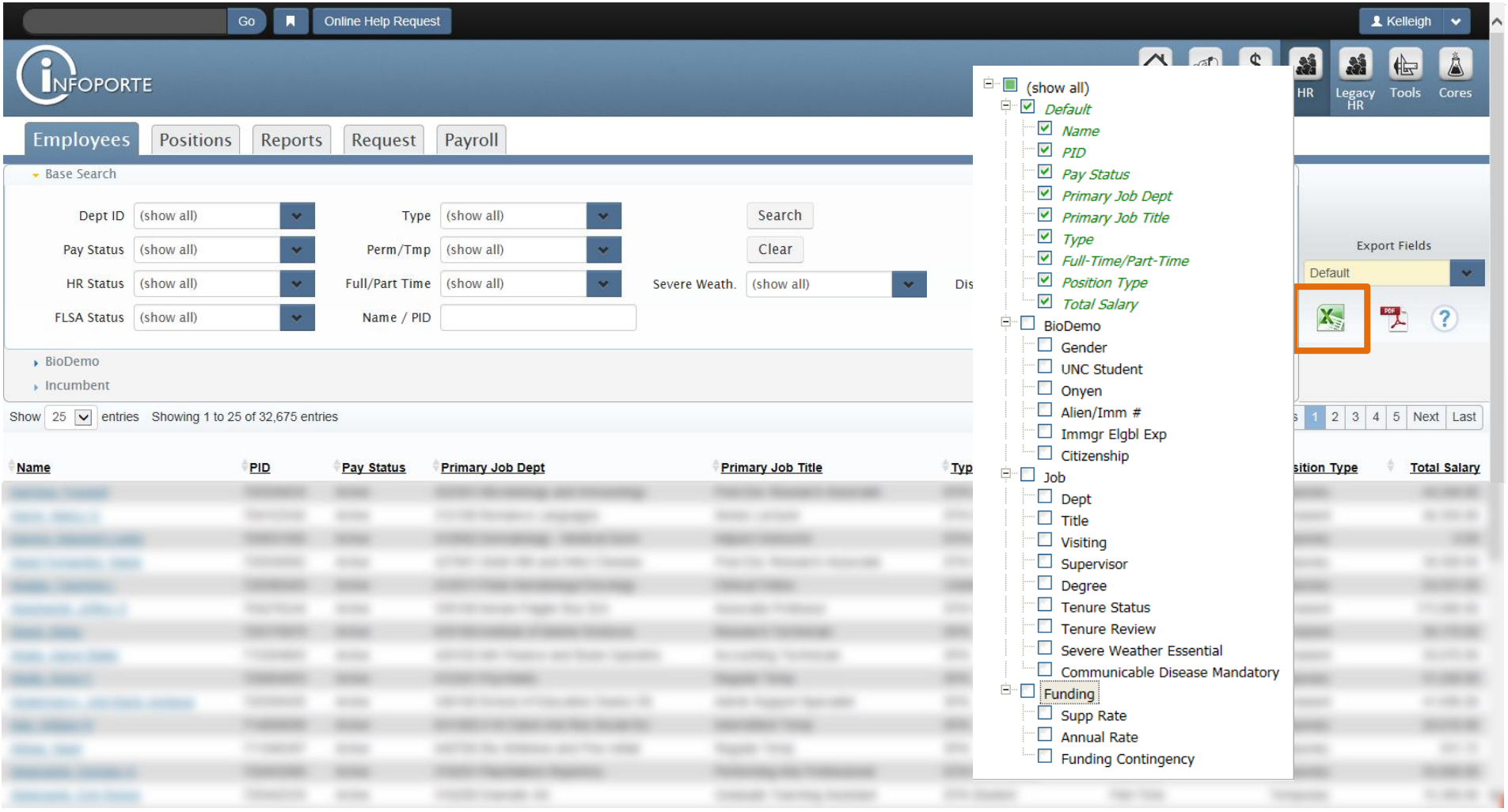

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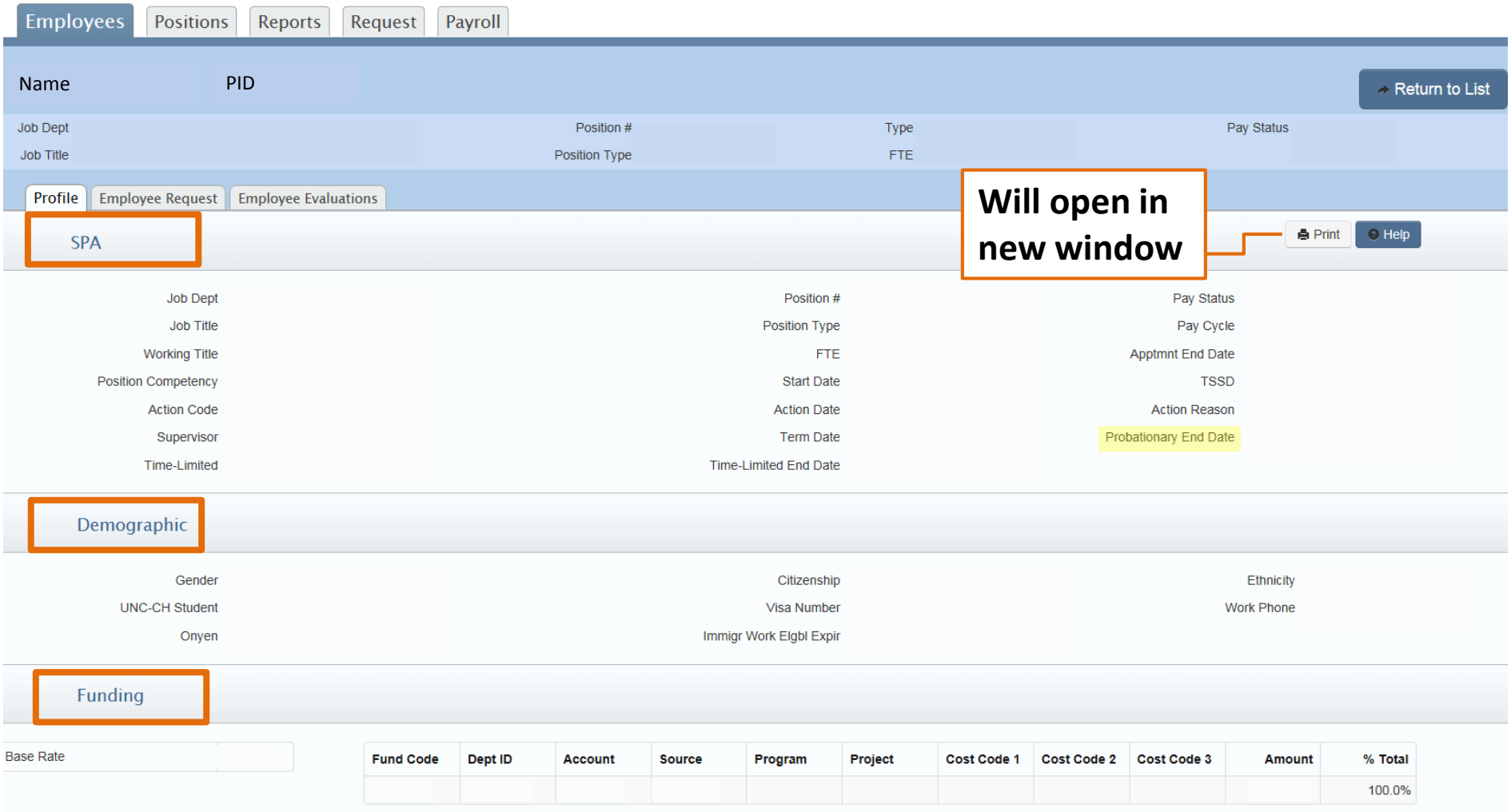

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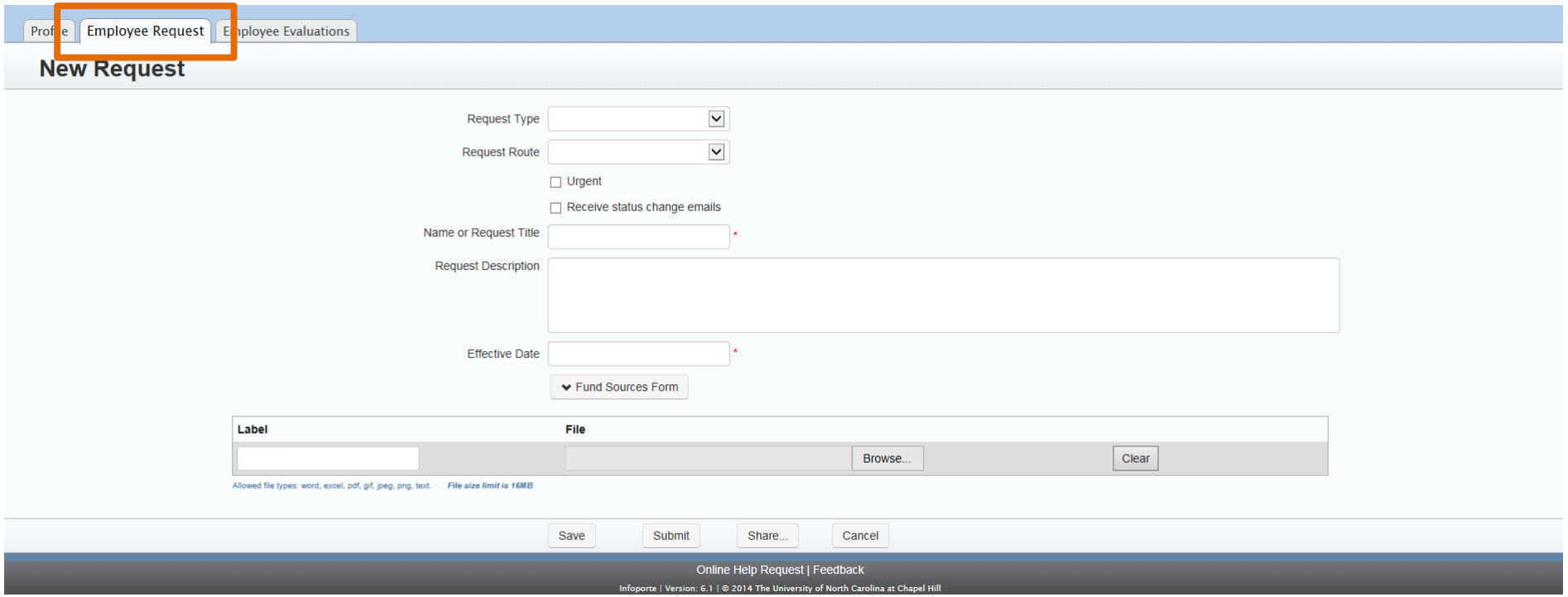
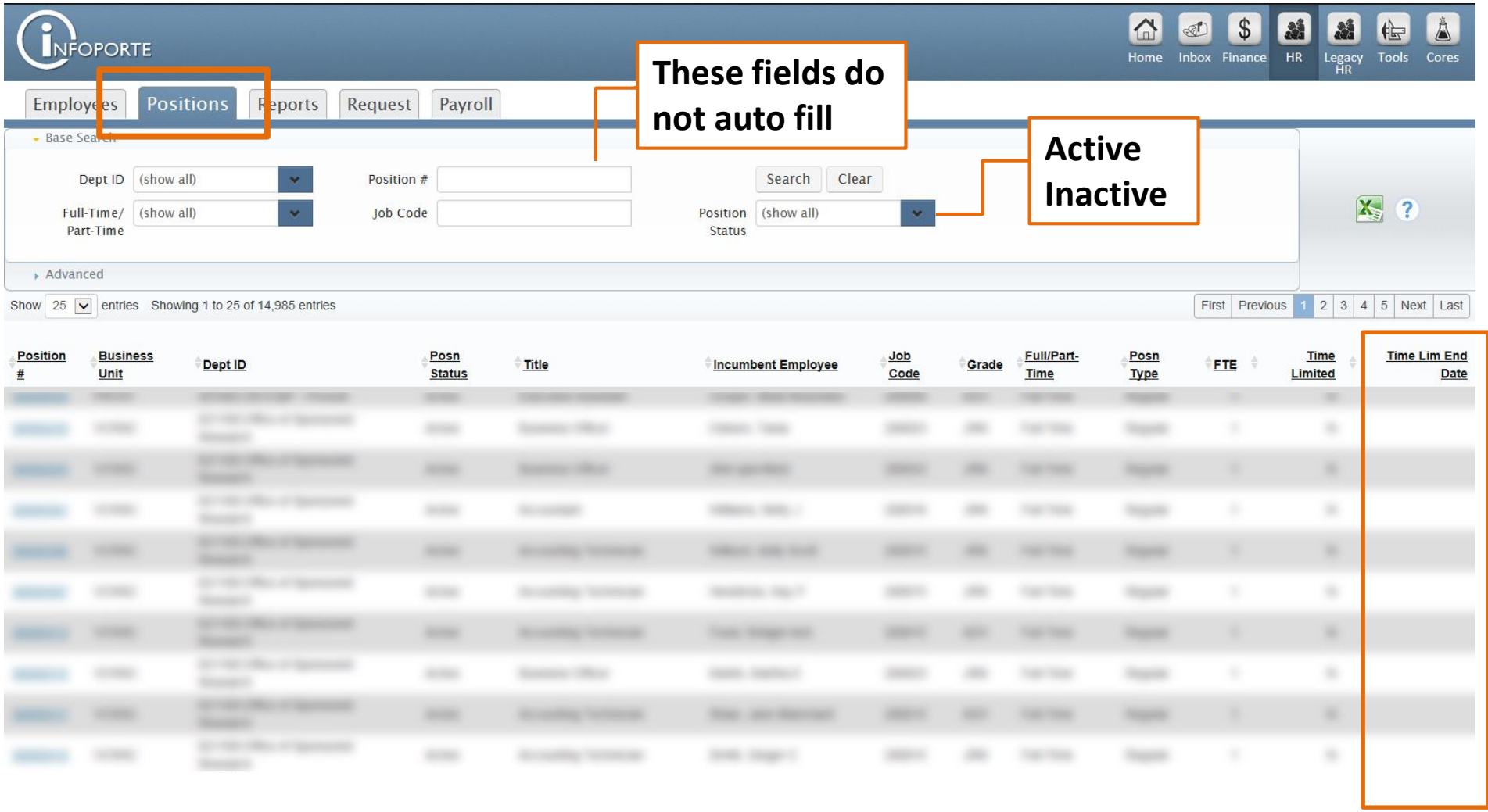


InfoPorte: HR/Payroll

Positions Tab

InfoPorte: HR/Payroll



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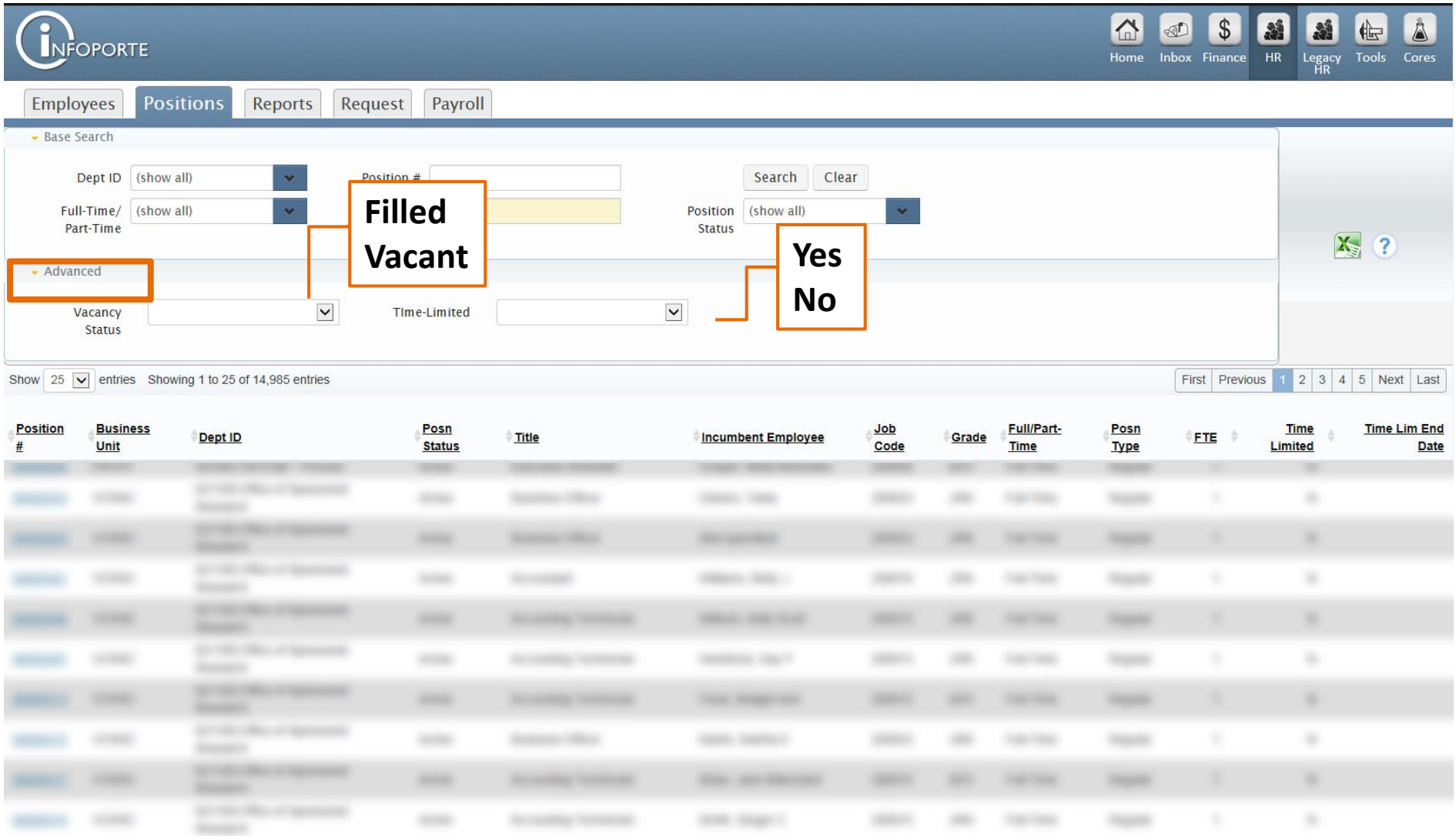

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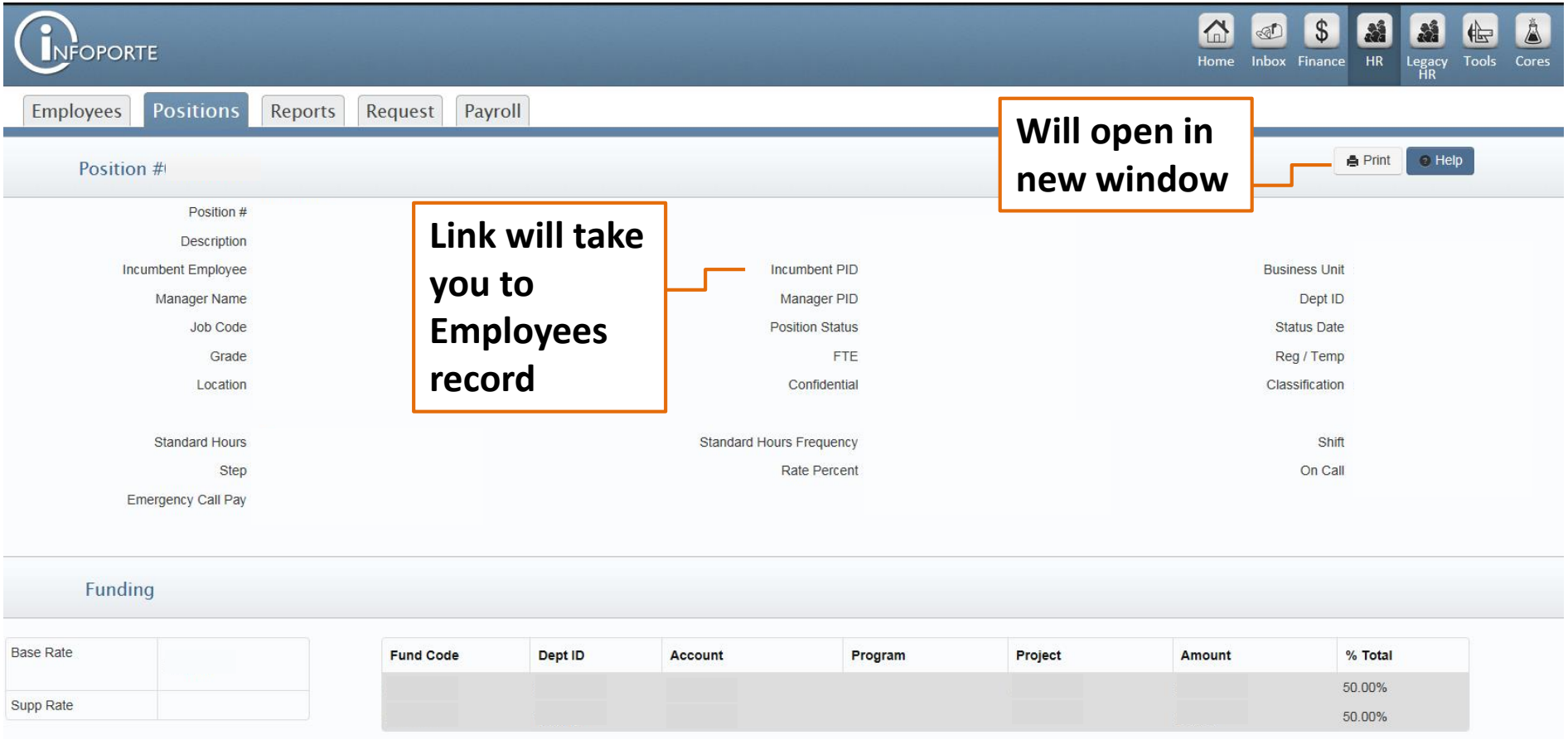

Payroll Tab

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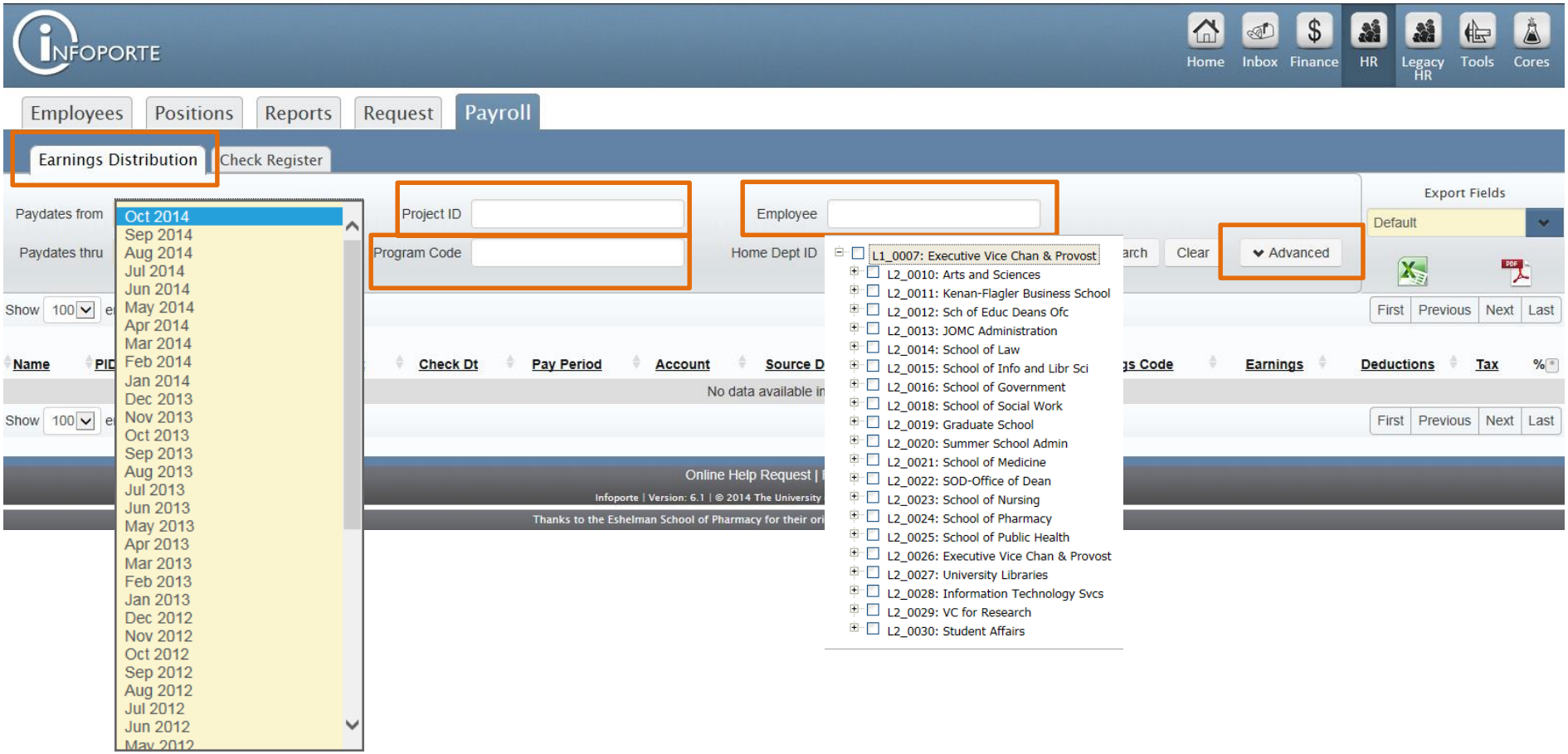
InfoPorte: HR/Payroll



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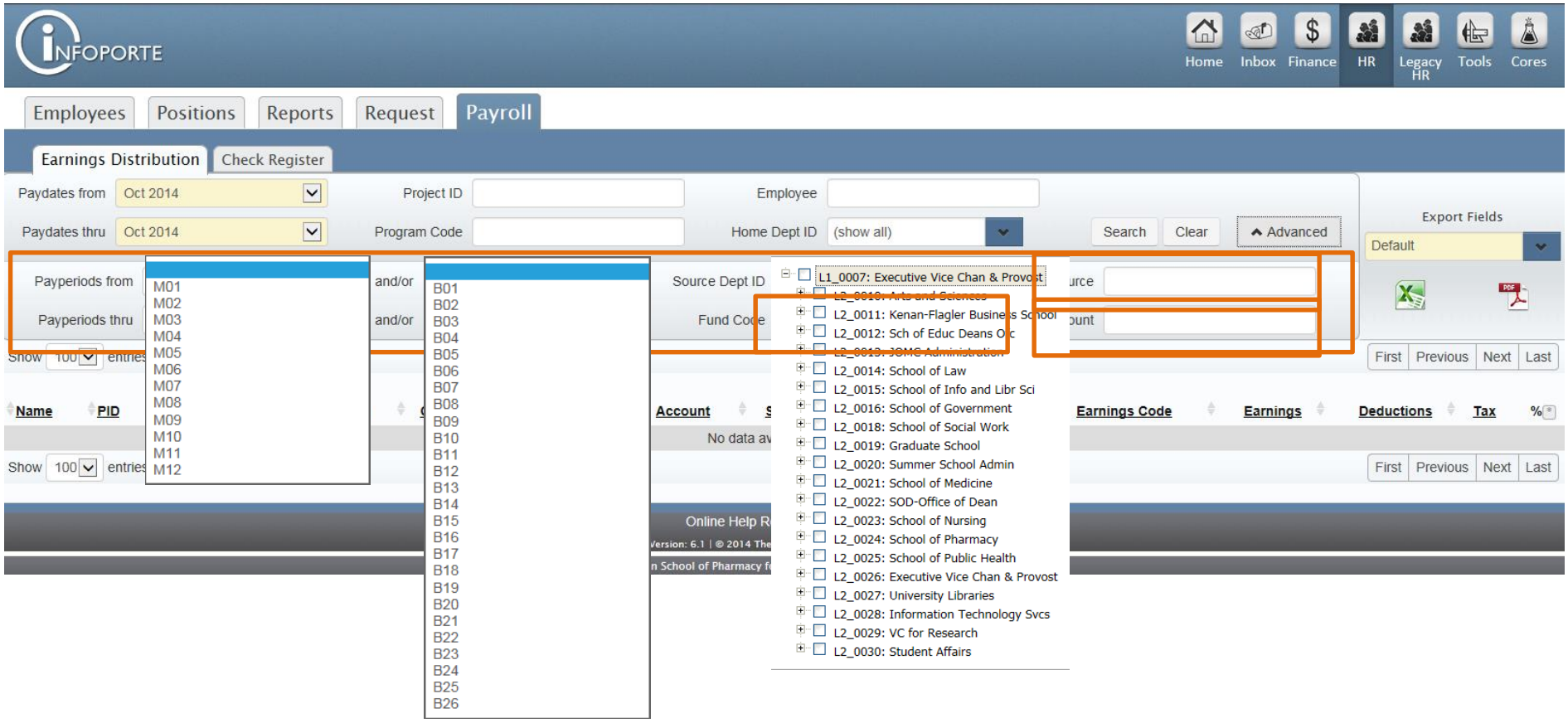

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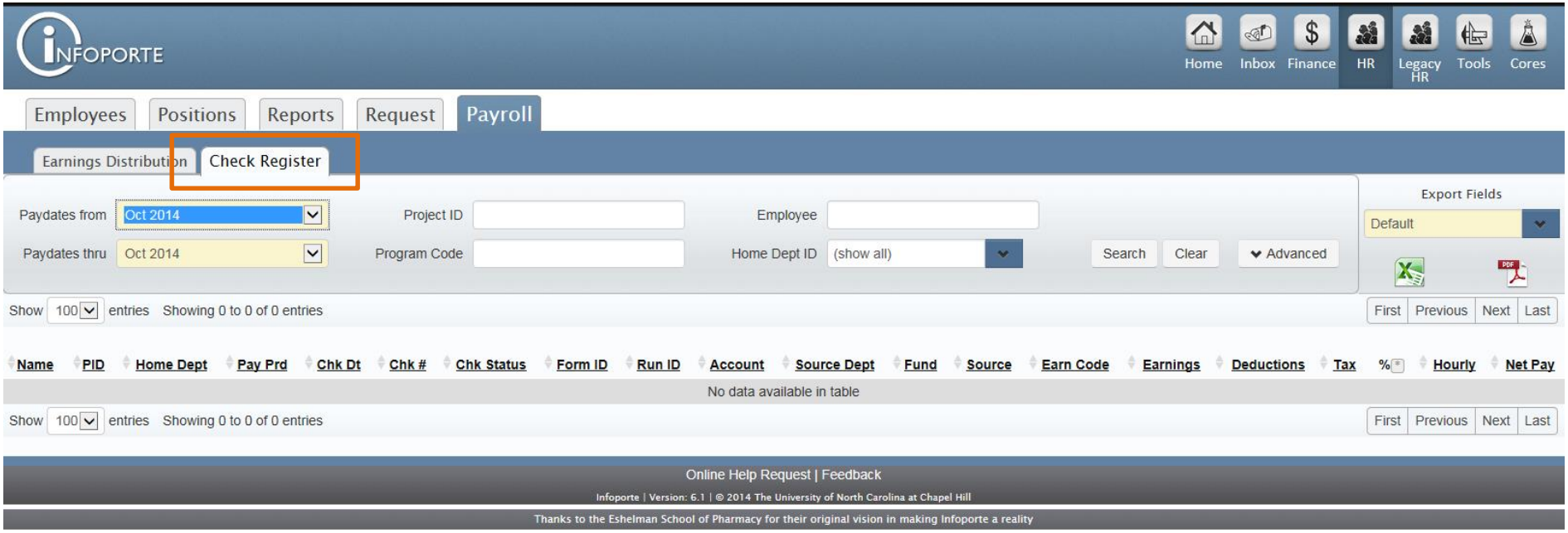

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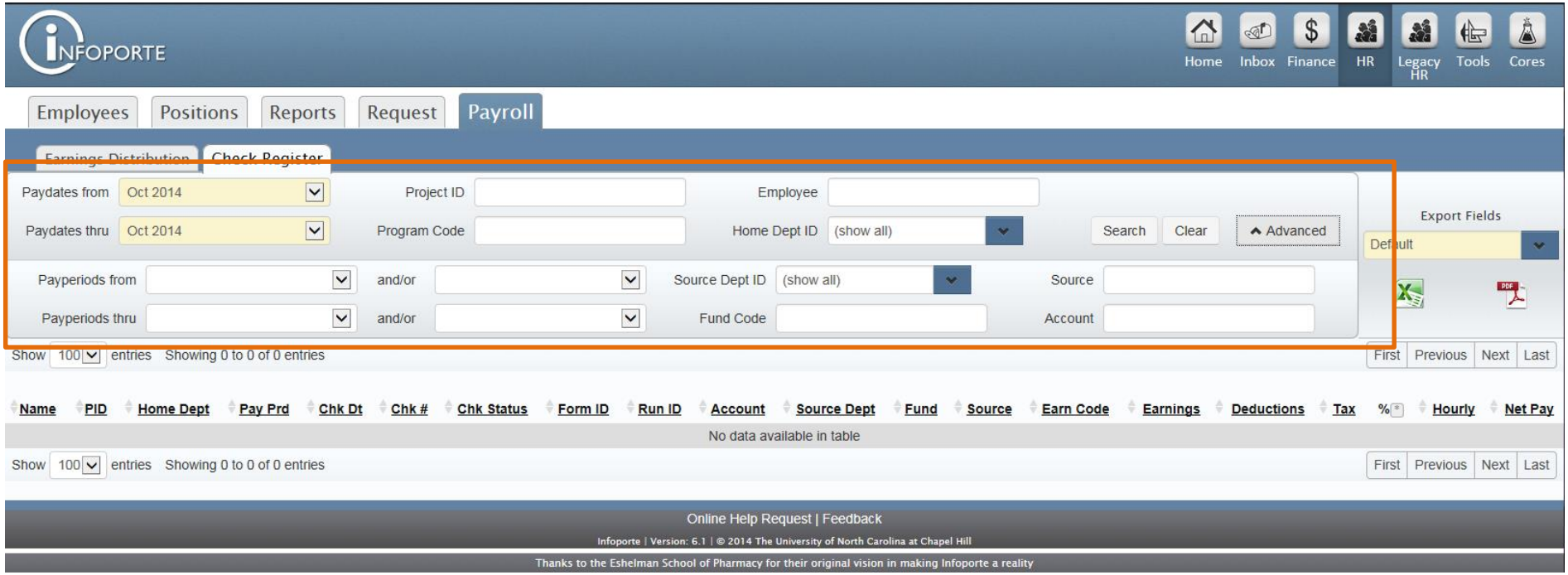

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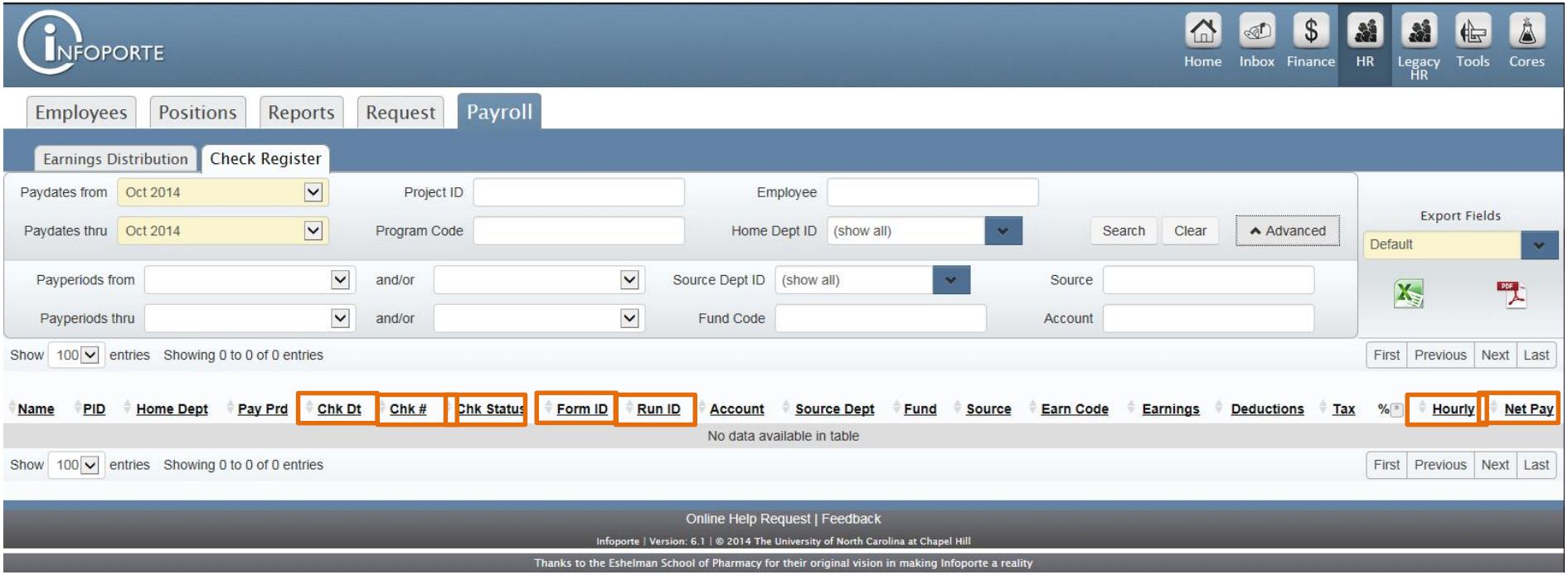

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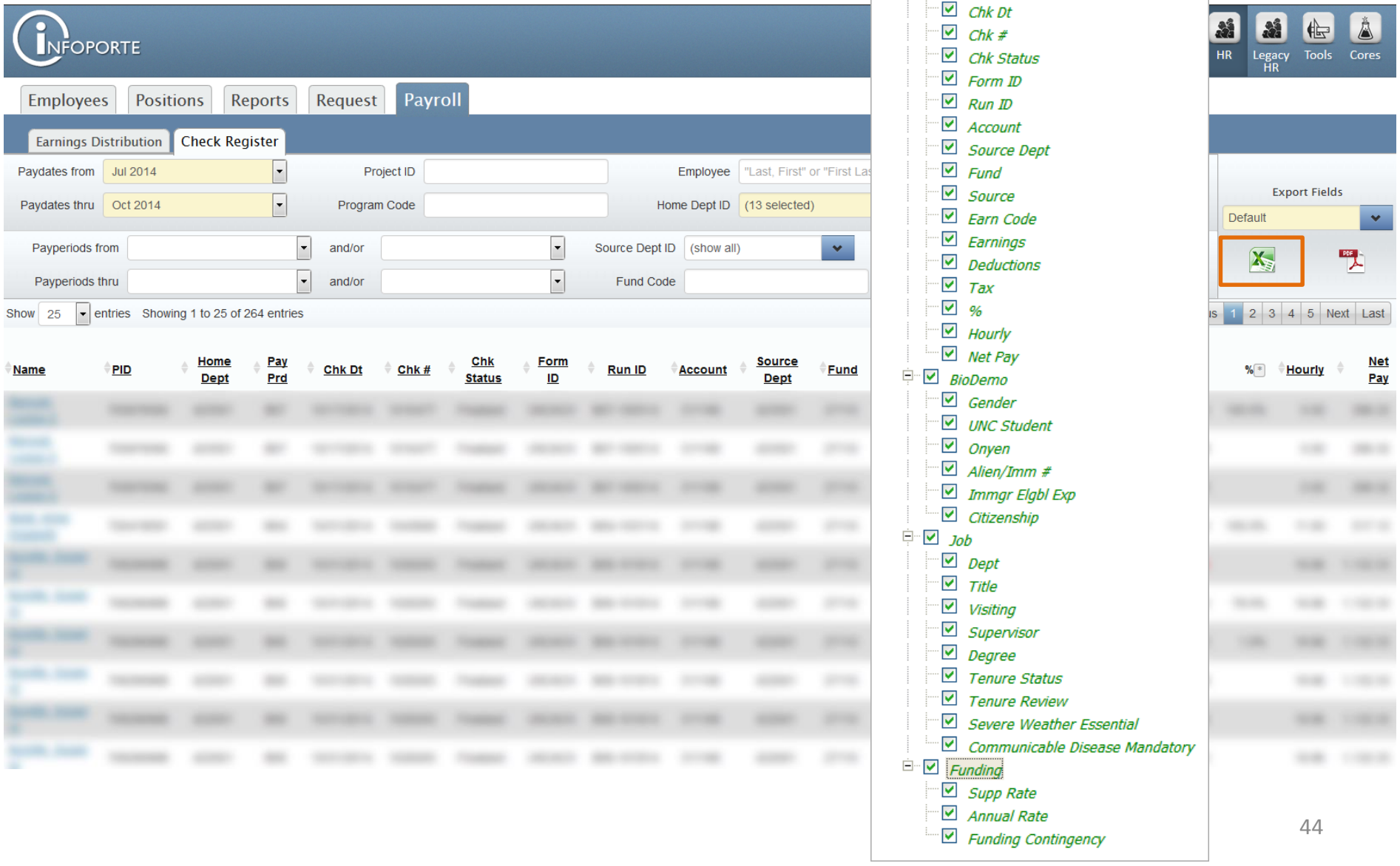
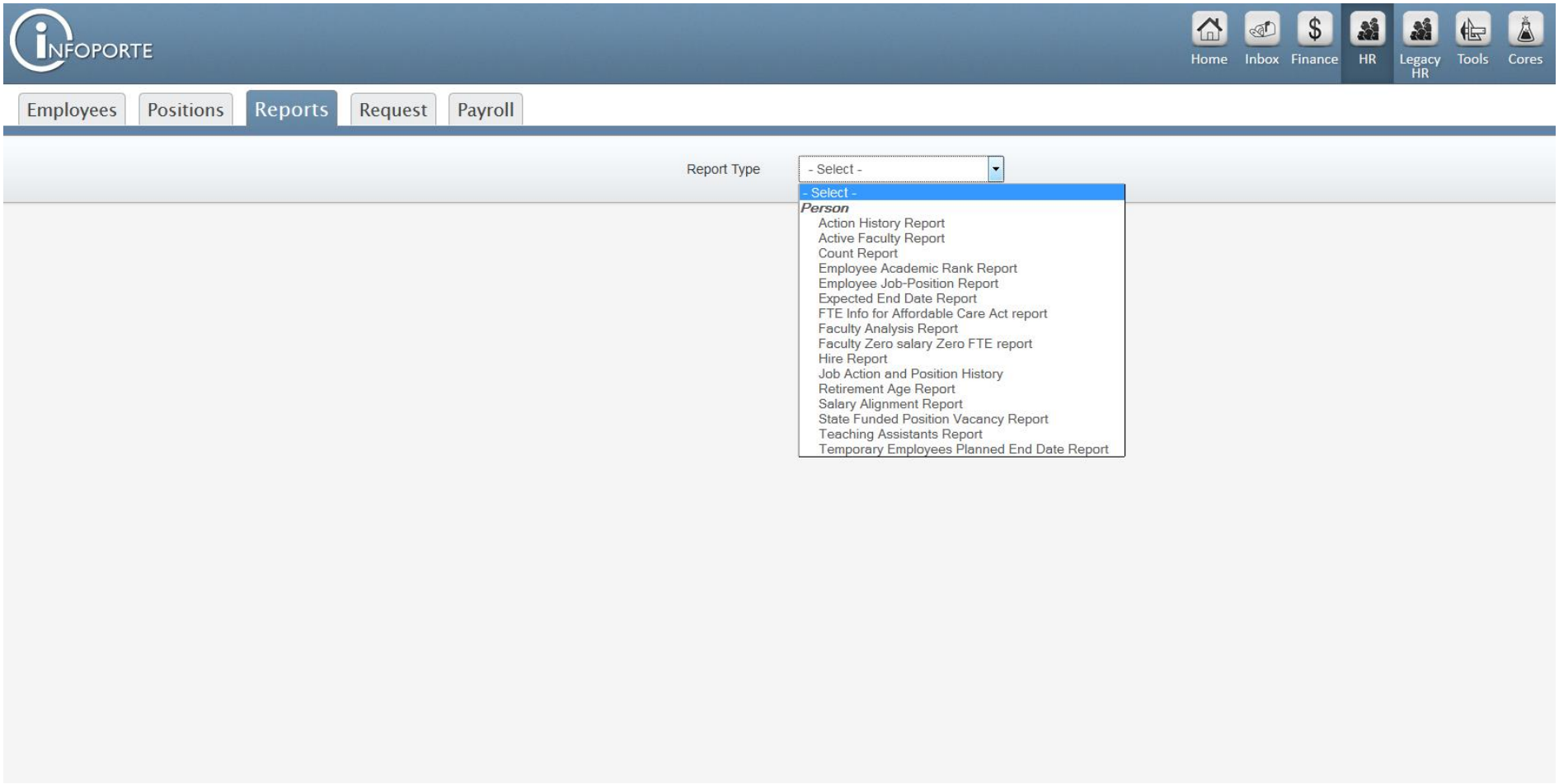


Reports Tab

InfoPorte: HR/Payroll



InfoPorte: HR/Payroll

1. Action History Report
2. Active Faculty Report
3. Count Report
4. Employee academic Rank Report
5. Employee Job-Position Report
6. Expected End Date Report
7. FTE Info for Affordable Care Act report – **under construction**
8. Faculty Analysis Report
9. Faculty Zero salary Zero FTE report
10. Hire Report**
11. Job Action and Position History
12. Retirement Age Report
13. Salary Alignment Report
14. State Funded Position Vacancy Report
15. Teaching Assistants Report
16. Temporary Employees Planned End Date Report

HR Requests

- Count Report
- Employee Job-Position Report
- Expected End Date Report
- Faculty Analysis Report
- Job Action and Position History
- Salary Alignment Report

InfoPorte: HR/Payroll

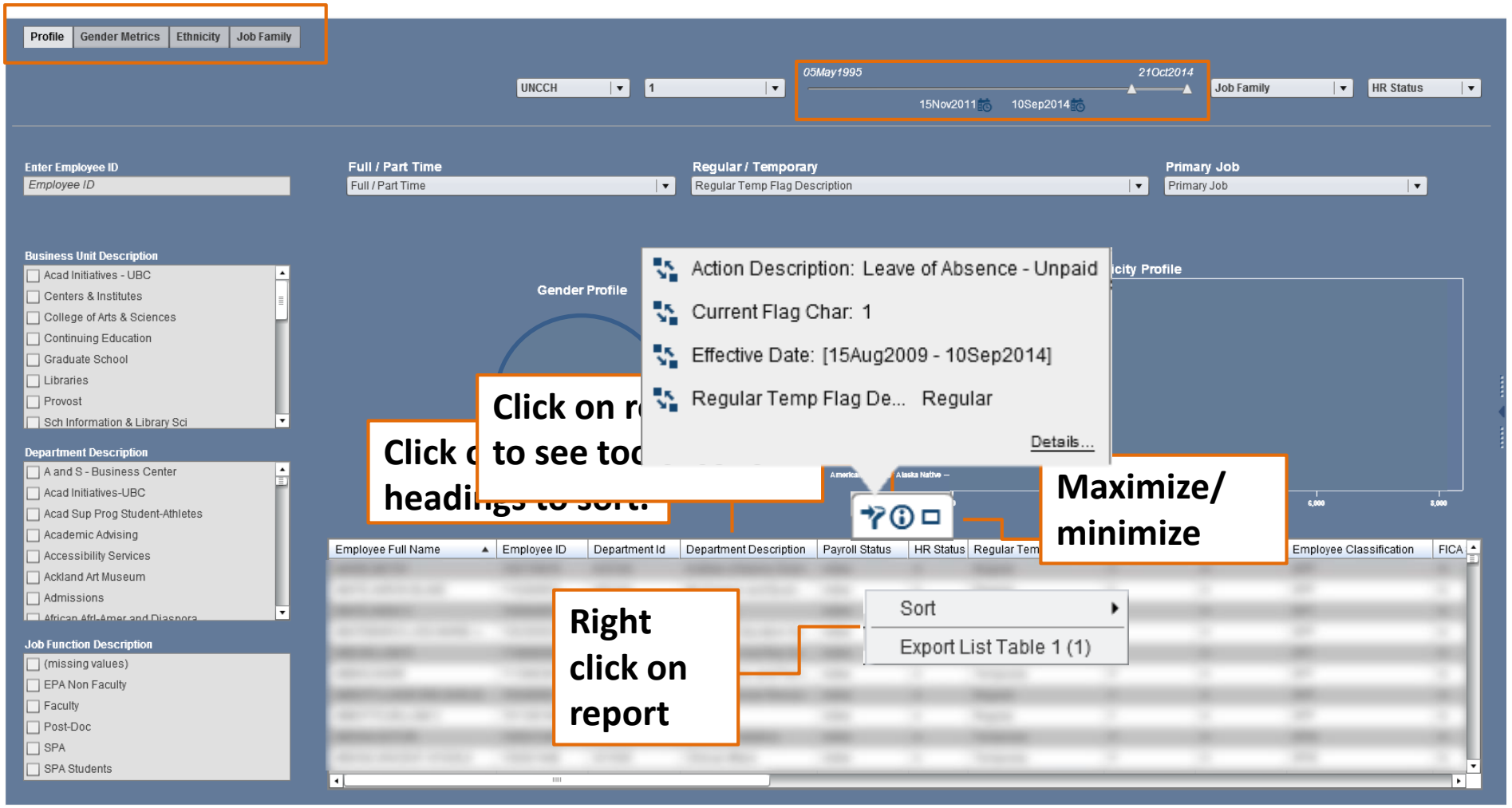
Count Report

- Count Report - Gender, ethnicity profile information is listed in a table based on the selection of Job Family, HR Status and Employee Type. Report provides:

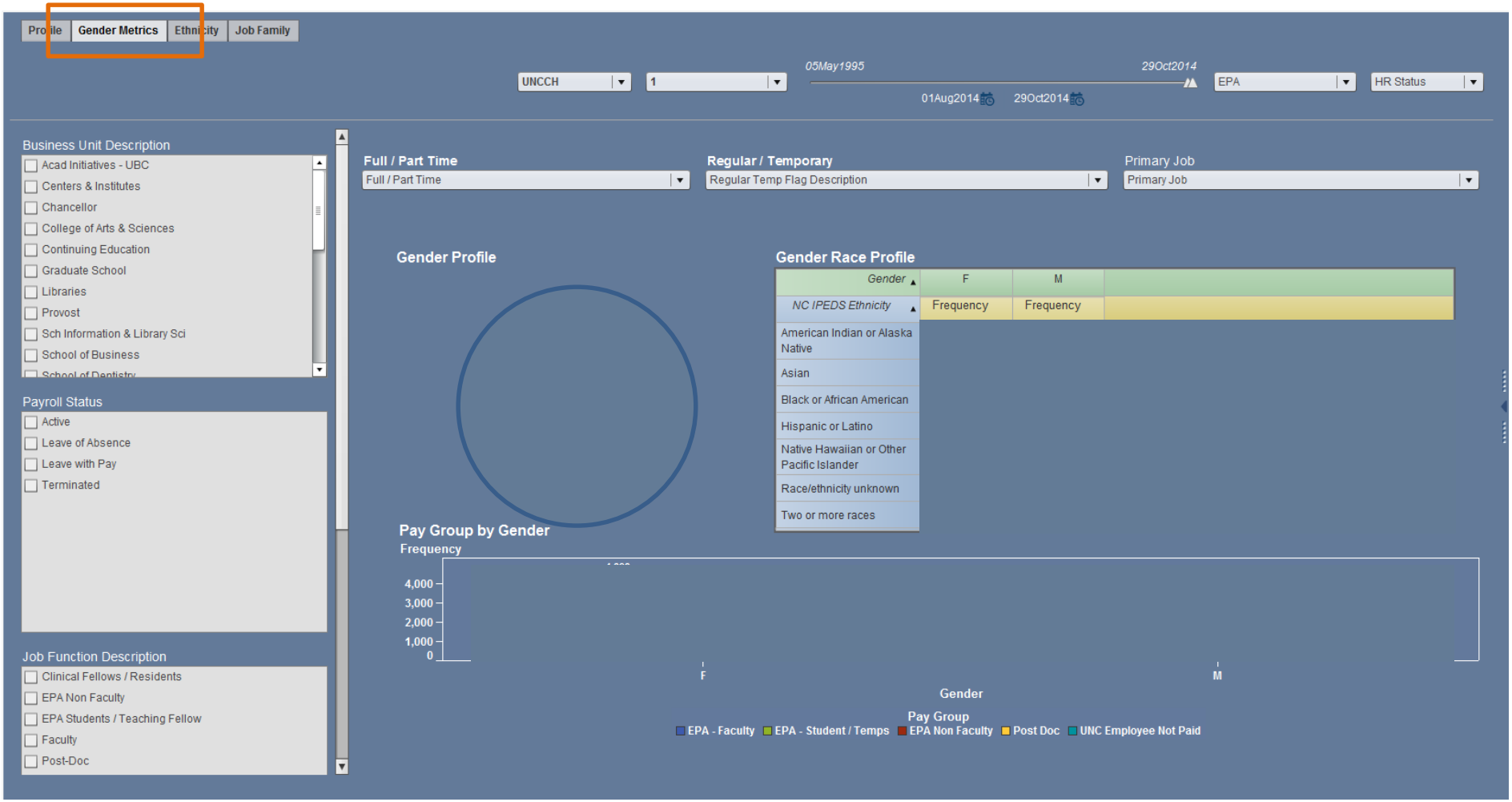
Filters: Business Unit, Position, Academic Rank, Department, Job Code

- Employee Full Name
- Employee ID/PID
- Department ID
- Department Description
- Payroll Status
- HR Status
- Regular Temporary
- Full/Part Time
- Employee Type
- Employee Classification
- FICA Status
- FLSA Status
- Job Family
- Pay Group Description
- Primary Job
- Job Code
- Job Code Description
- Job Function
- Job Entry Date
- FTE
- Effective Date
- Action Description
- Action Reason
- Faculty Tenure Status
- Tenure Granted Date
- Position Description

Count Report



Count Report



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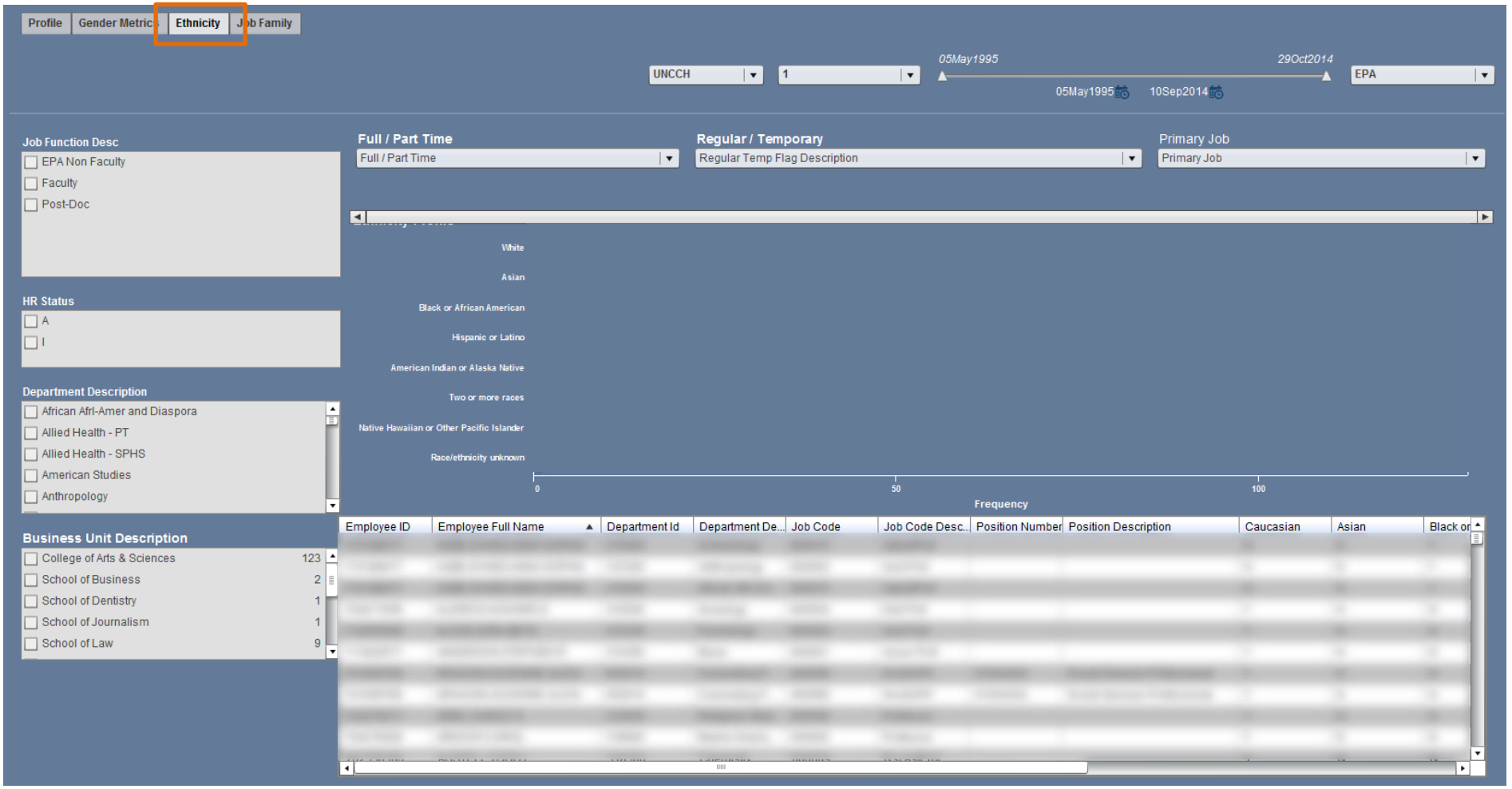
Count Report



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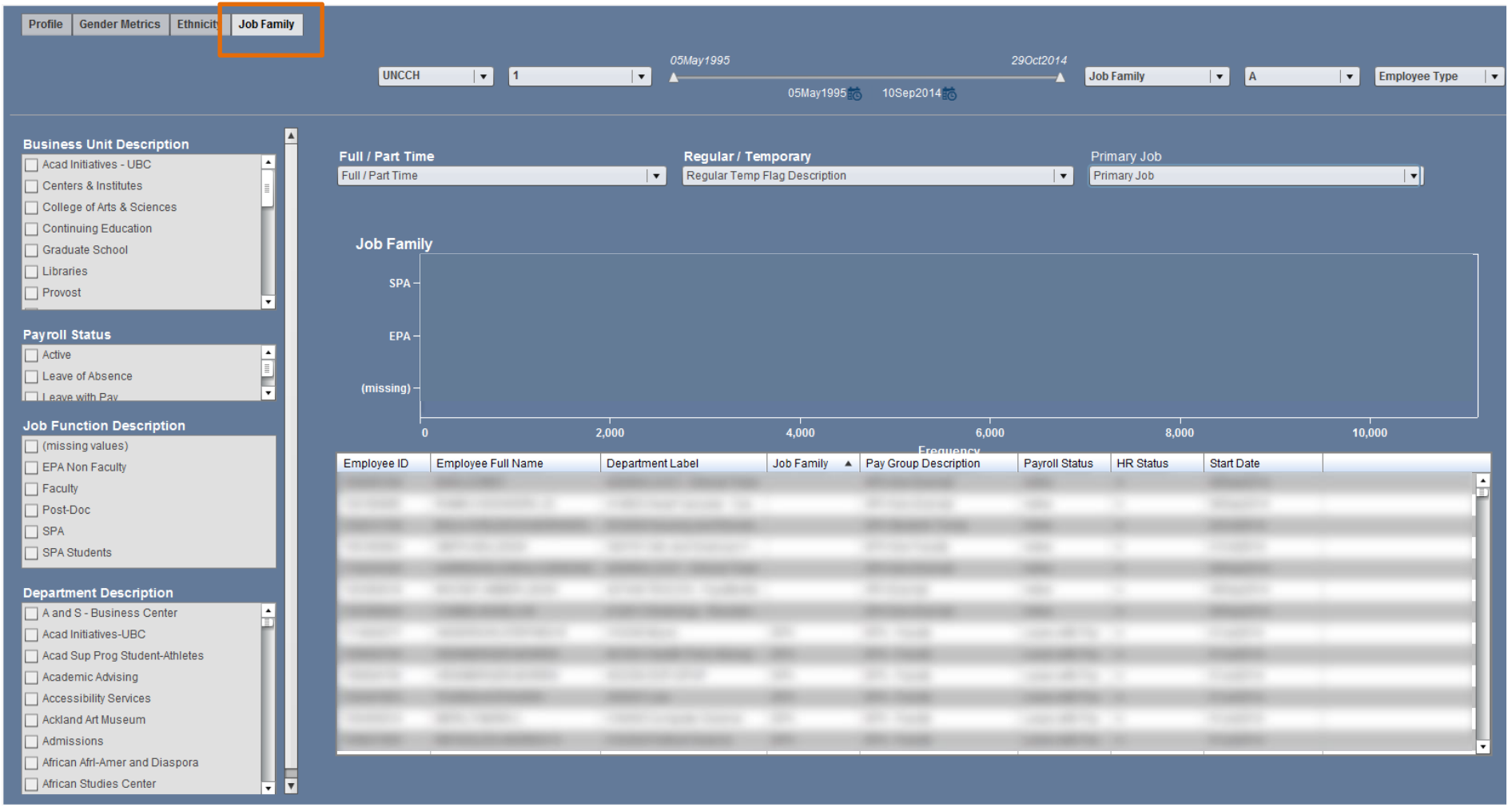


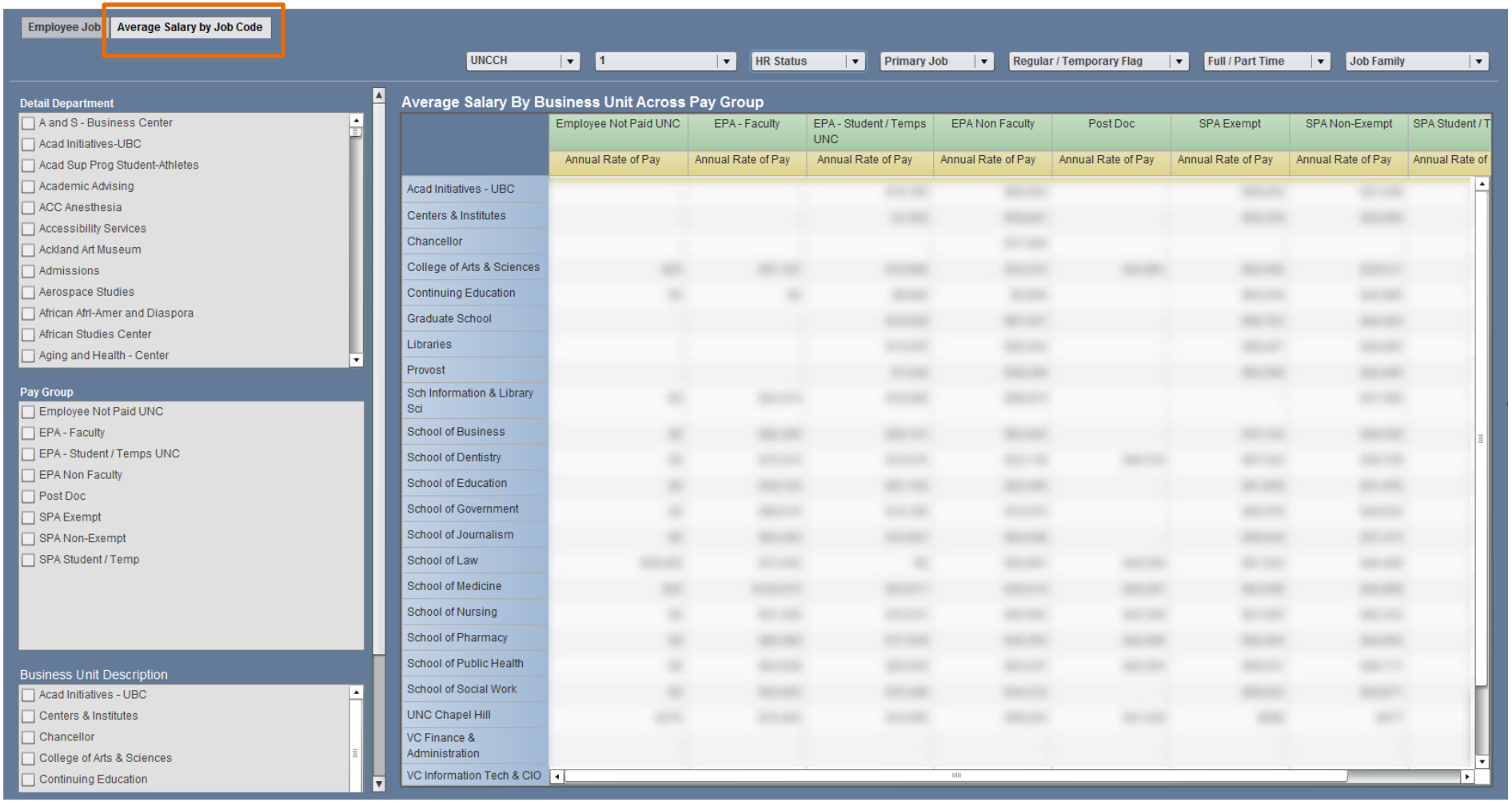
Employee Job- Position Report

- Employee Job- Position Report -Average salary information is graphically represented based on the selections like Reg/Temp Employees and Full/Part Time.
  - Report Provides:

- Employee Class
- Employee ID
- Employee Name
- Department
- Employee Type
- Reg/temp
- Full/part
- HR Status
- Payroll Status
- Business Unit
- Job Code
- Job Function
- EEO Class
- Employee Class Set ID
- Benefit Program
- Time in service date
- Pay Group
- Salary grade
- Hourly Rate of Pay
- Annual Rate of Pay
- Job Entry Date
- Effective Date
- Position
- Primary Job
- Location
- Faculty Tenure
- Tenure Granted
- Action
- Communicable Disease
- Severe Weather

Employee Job – Position Report

Employee Job – Position Report



Expected End Dates Report

- Expected End Dates Report –End Date is computed based on the difference between the planned end dates and the system date. The end date arrival time is categorized into day buckets and displayed interactively.

  Filters: Business Unit, Position, Academic Rank, Department, Job Code

  – All Employees:
    - Employee Name, ID ,Job Code, Primary, Expected Job End Date, Assignment End Date

  – Initial Appointment more than 6 months
    - Employee ID/Name, Primary, Job Code Desc, Effective Date, Expected Job End Date, Appointment Length (Days), Appt Length GT 6 months, Action Date, First Assignment Start, First Start Date ,Last Assignment, Start Date, Last Start Date, Assignment End Date

  – Interactive Report
    - Employee ID/PID, Employee Full Name, Job Code Description, Primary Job, Expected Job End Date, Assignment End Date

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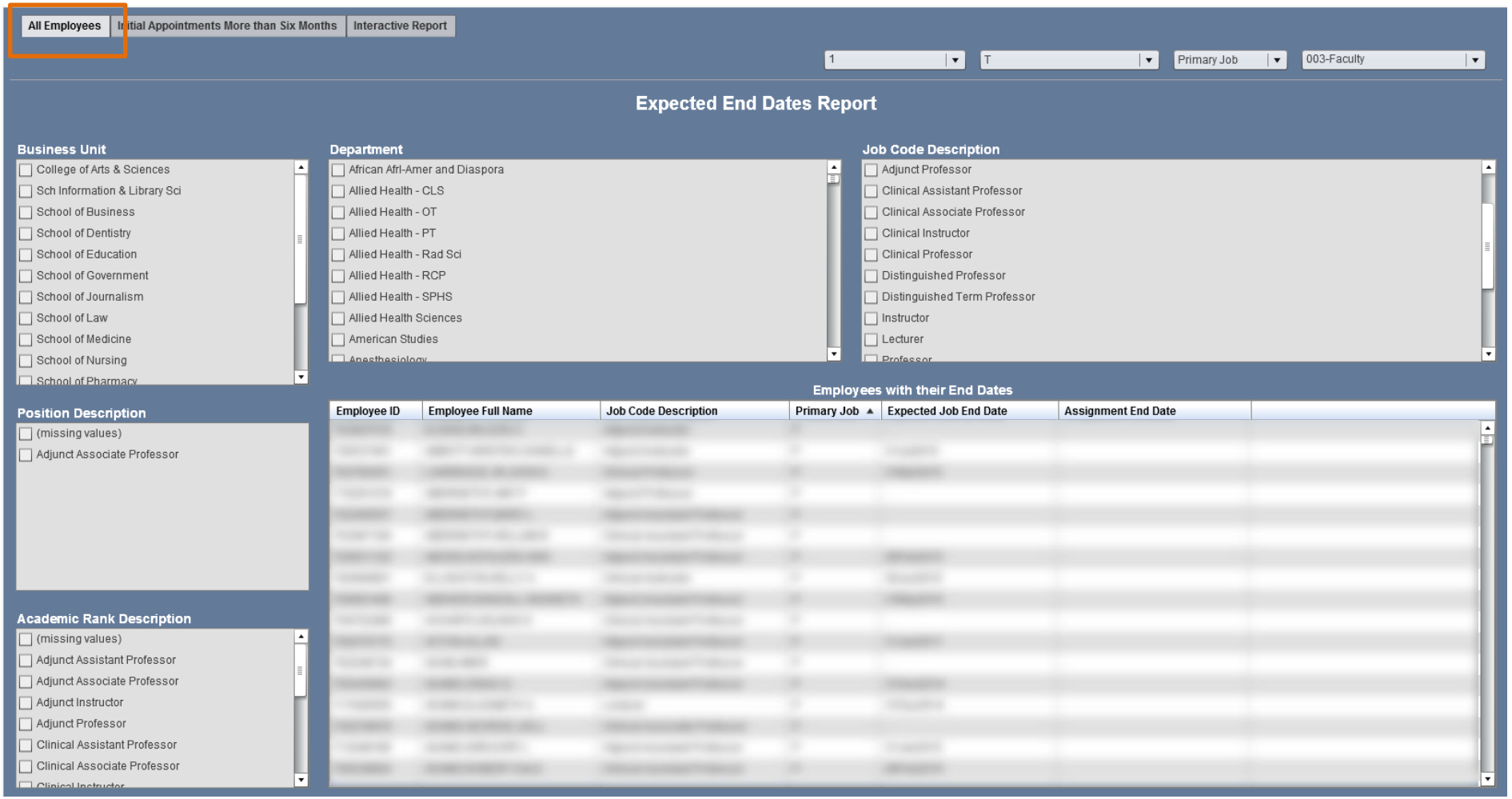
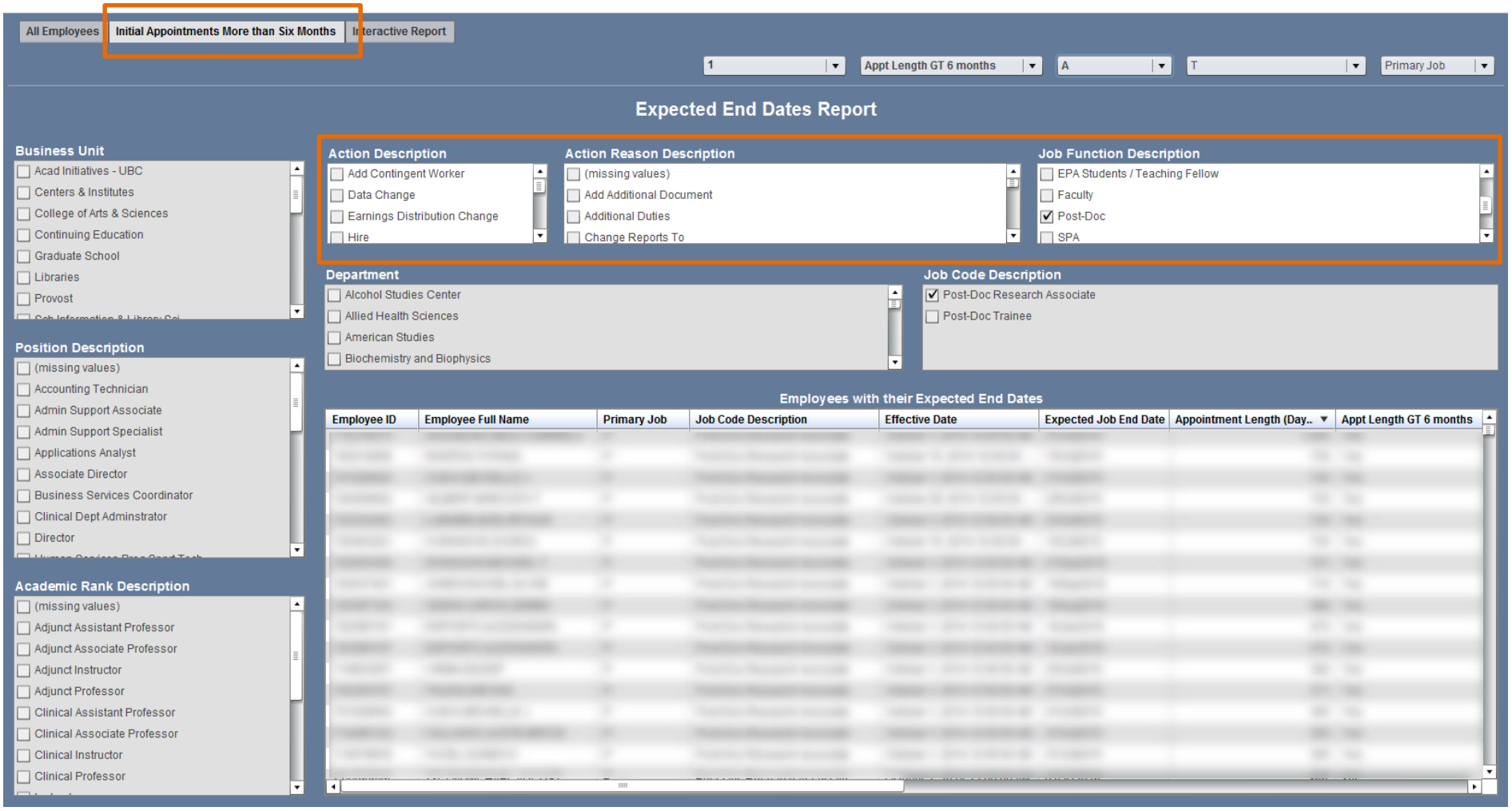
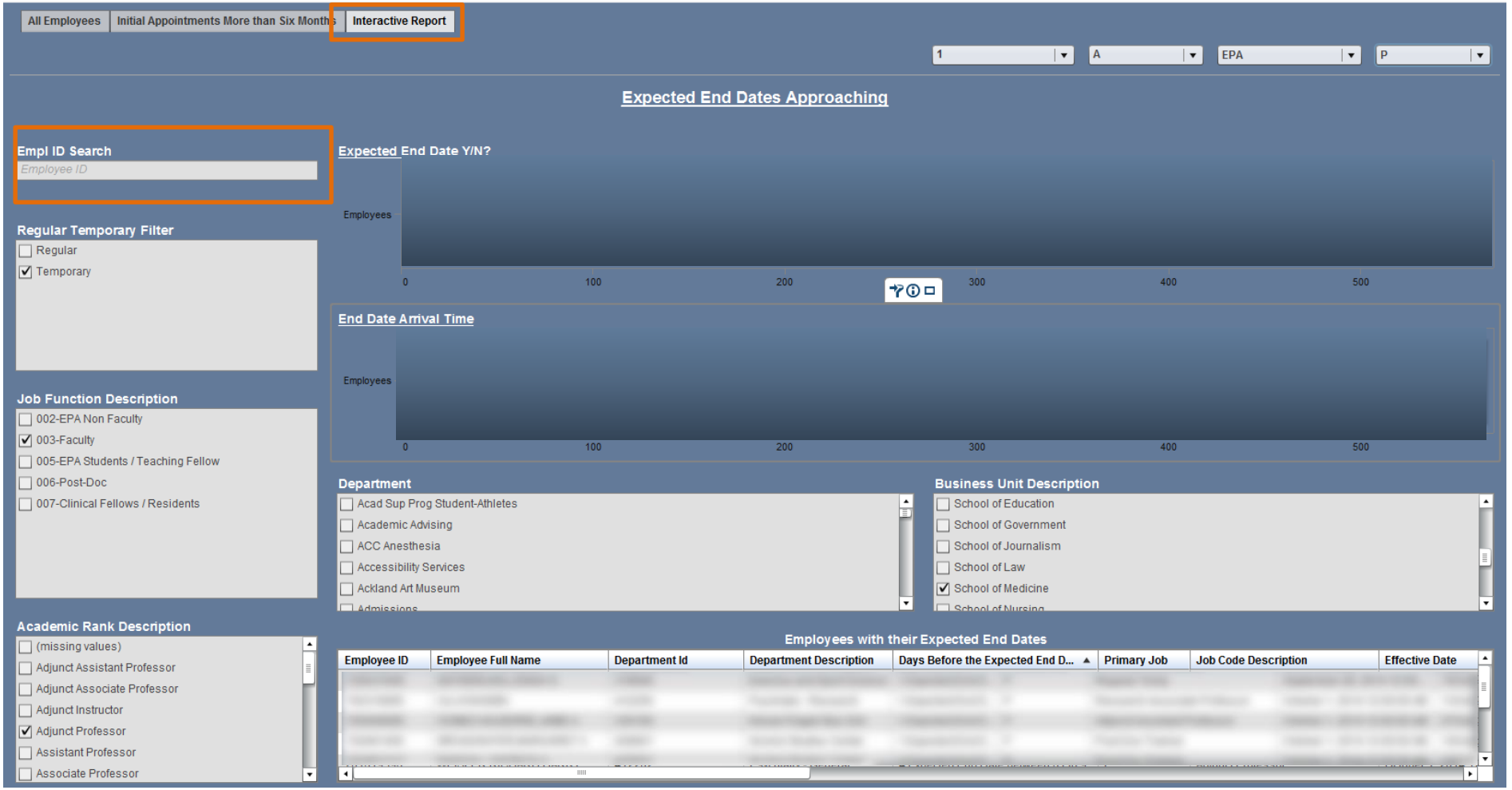
Expected End Dates Report



Expected End Dates Report



Expected End Dates Report



Faculty Analysis Report

- Faculty Analysis Report – Adjuncts/Full Professor Democraphics Summary displayed for a specific time period.

  Filters: Bus Unit, Department, Academic Rank Name

  – Reports on all four tabs include:

    - Employee Name, ID, Effective Date, Payroll Status, HR Status, Job Function Desc, Reg/Temp, Full/Part Time, Department, Job Code, Academic Rank, Faculty Tenure, NC IPEDS Ethnicity, Gender, DOB

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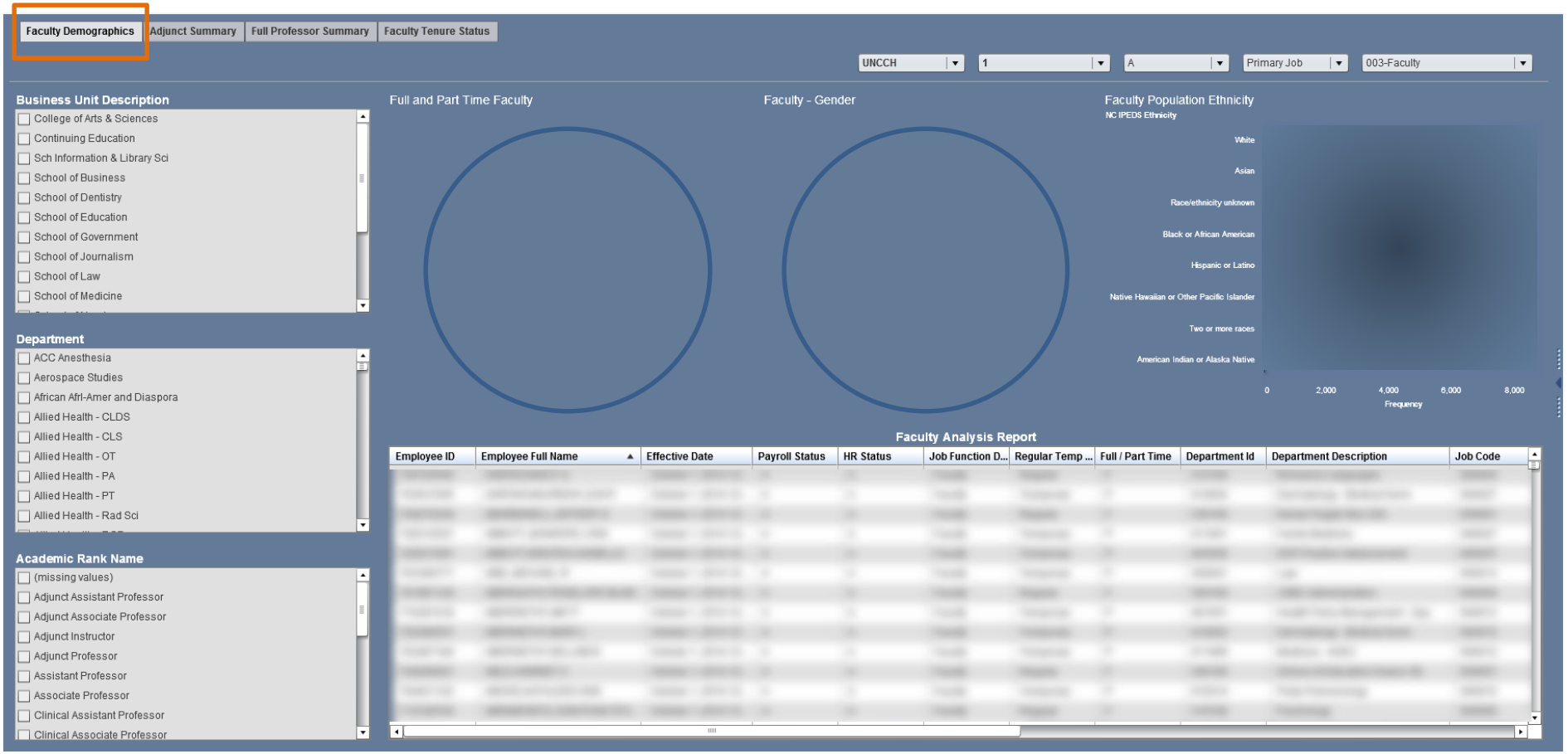
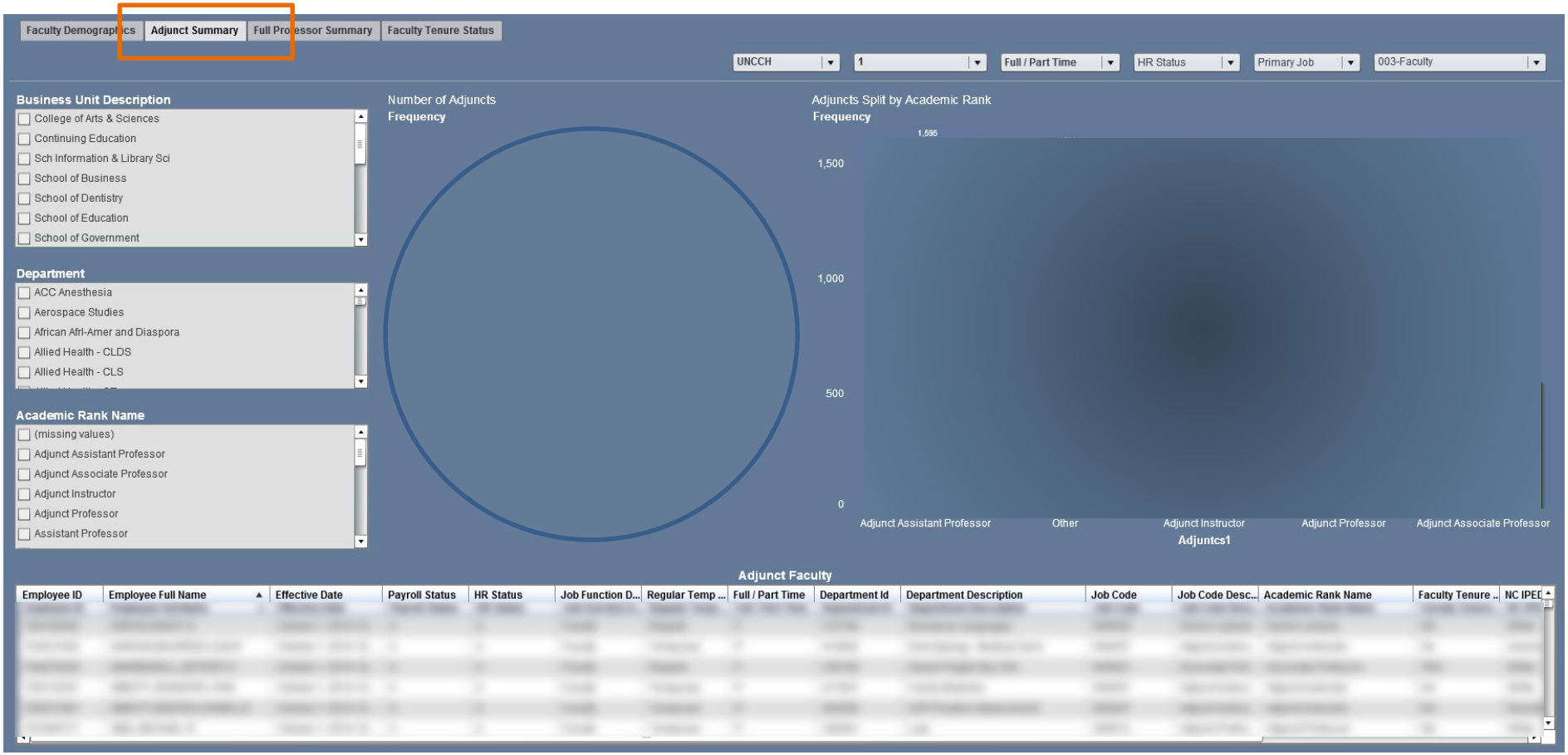
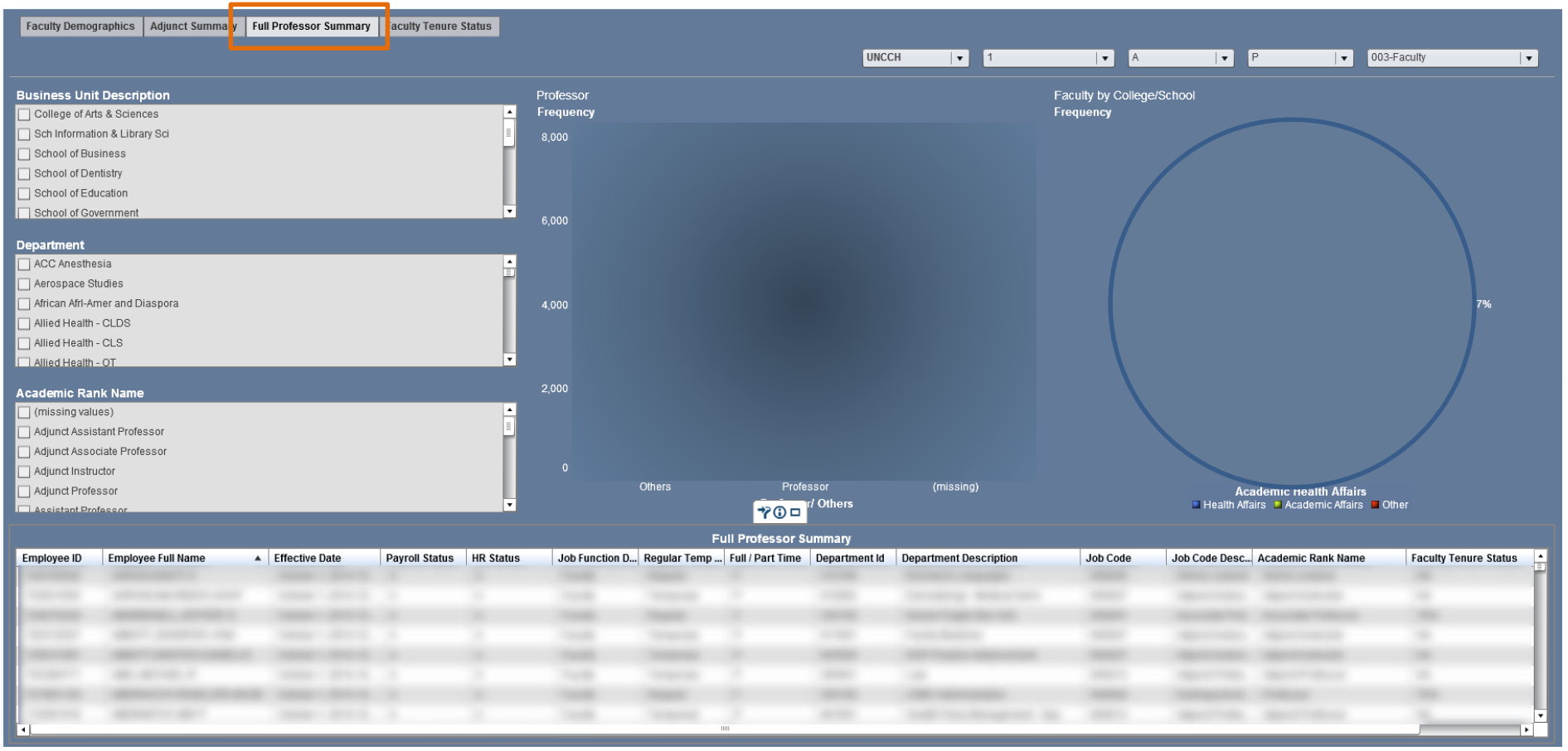
Faculty Analysis Report



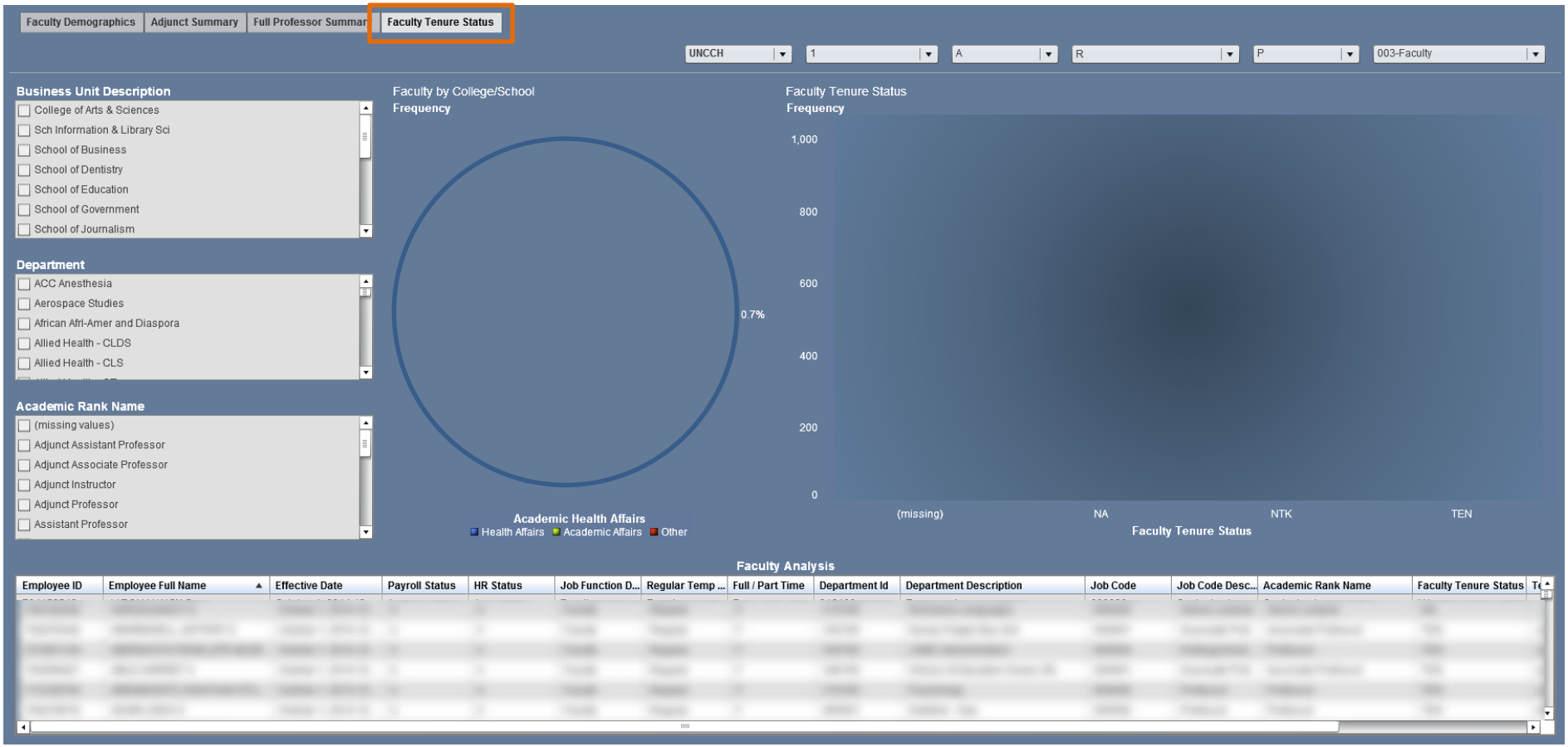
Faculty Analysis Report



Faculty Analysis Report



Faculty Analysis Report



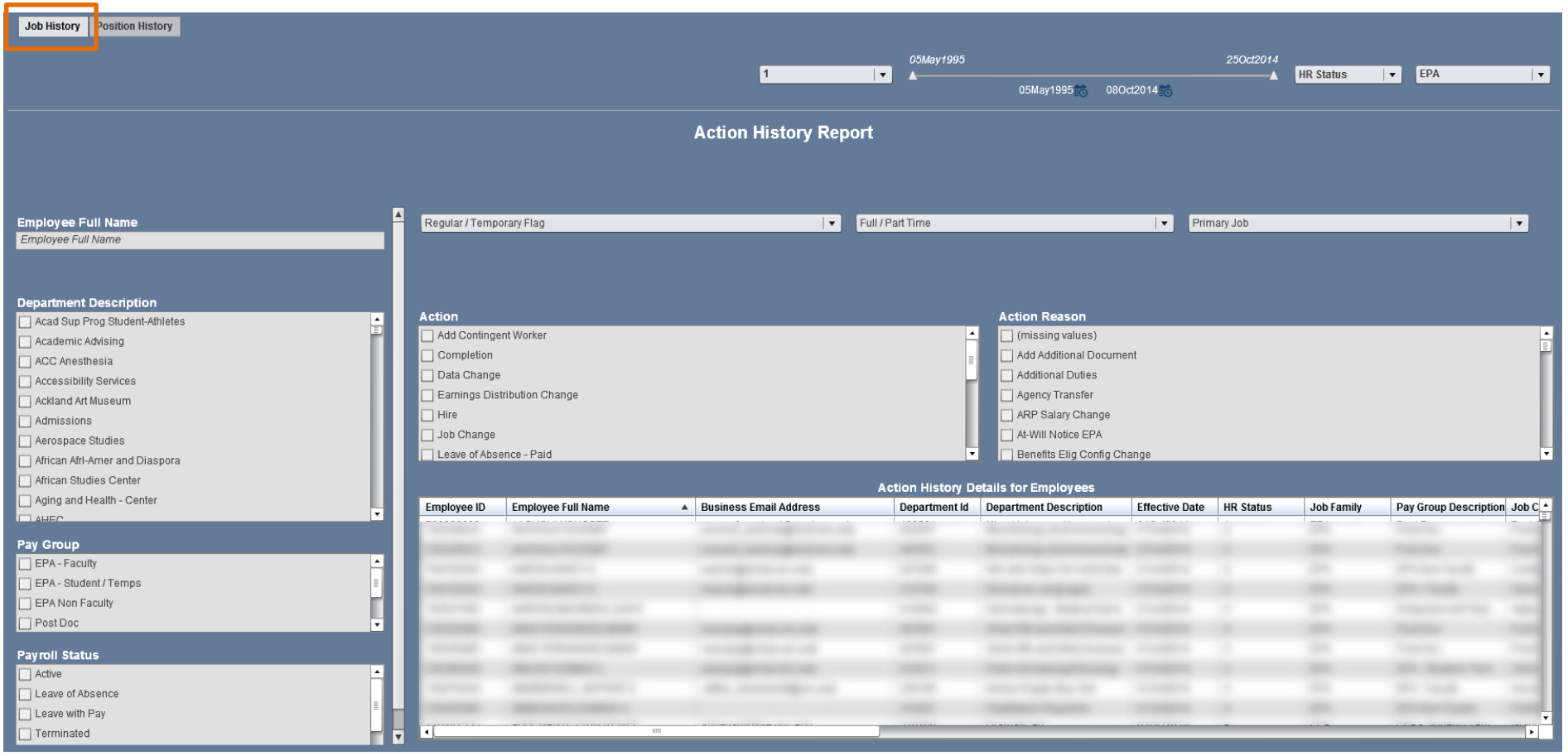
Job Action Position History Report

- Job Action Position History Report – Job Action and Position History information can be listed based on the position number and other filters

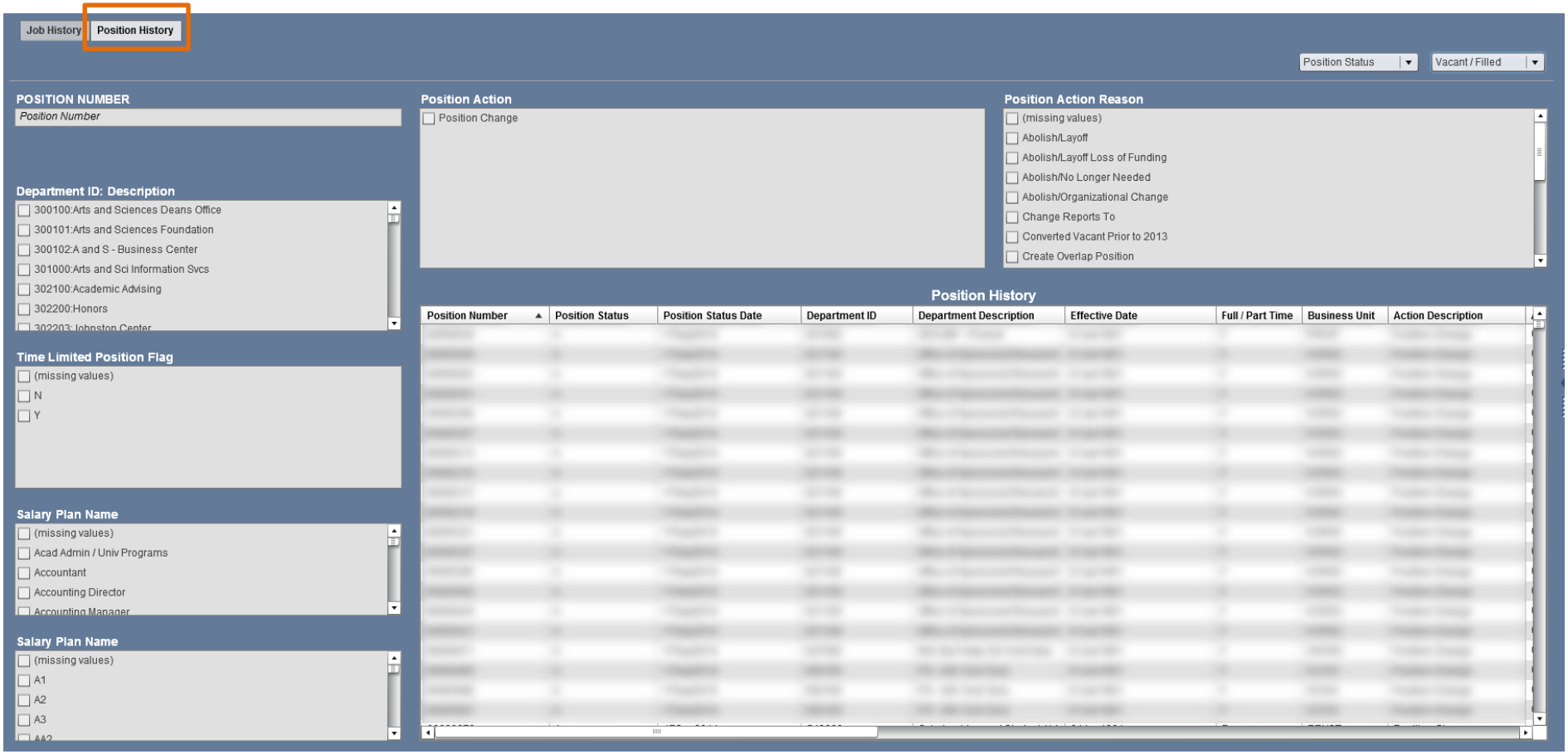
  Filters: Employee Name, Department, Pay Group, Payroll Status, Reg/Temp, Full/Part time, Primary, Action, Action Reason

  - Job History:
    - Employee Name, ID, Business Email, Dept, Effective Date, HR Status, Job Family, Pay Group, Job Code
  - Position History:
    - Position number, Position Status, Position Start Date, Department, Full/Part Time, Business Unit, Action Desc

Job Action Position History Report



Job Action Position History Report



Salary Alignment Report

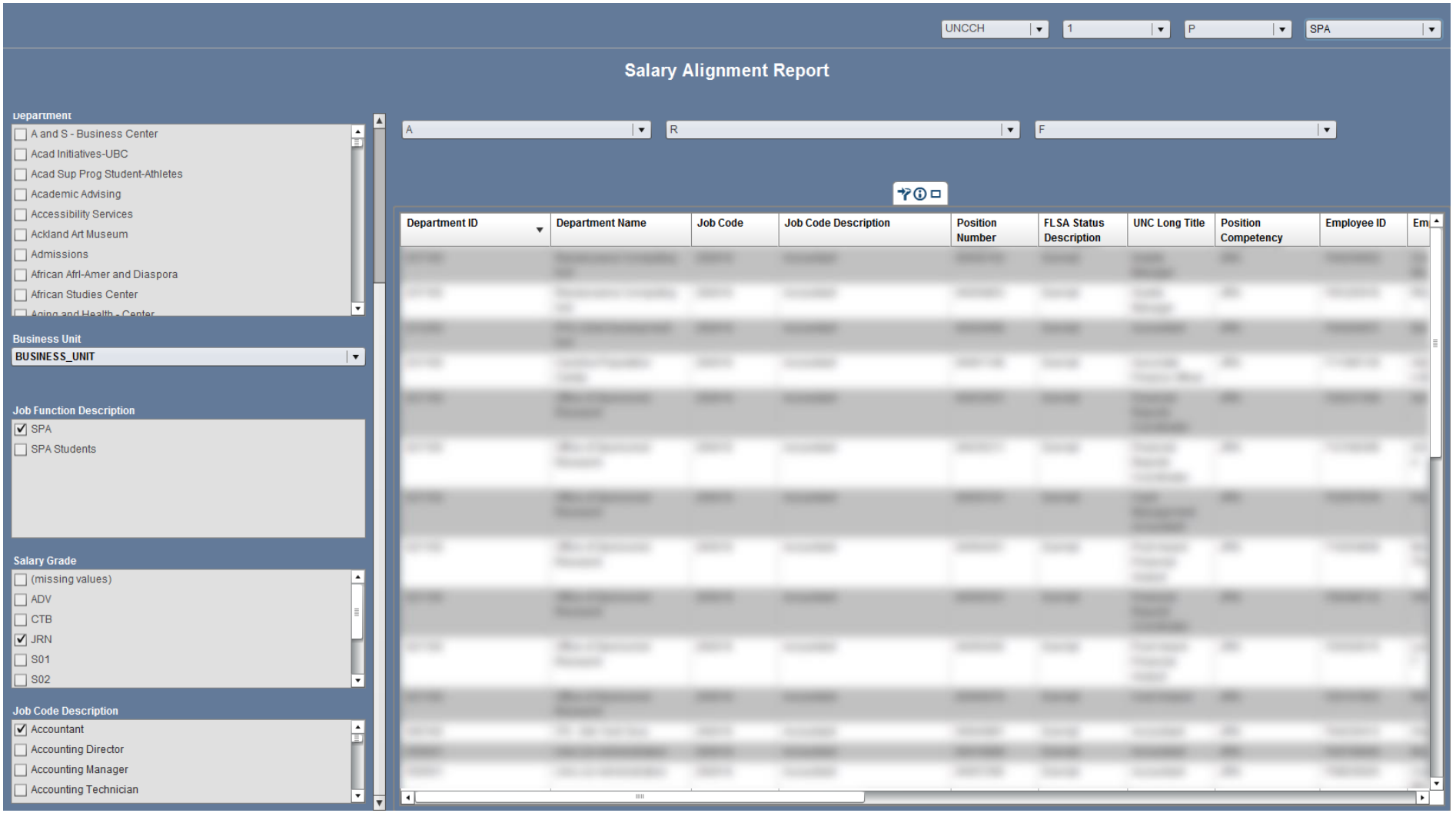
- Salary Alignment Report – Report providing Market based compensation equity analysis for employees.

  Filters: Employee Name, Employee ID, Department, Bus Unit, Job Function, Salary Grade, Job code, HR Status, Reg/Temp, Full/Part Time

  – Report includes:

    - Dept Name, Job Code, Position, FLSA Status, UNC Long Title, Position Competency, Employee Name and ID, FTE, FTE Salary, Comparison Ratio, Gender, Age, Ethnic Group, HR Status, Range Min, Market Rate, Range Max
    - Comparison Ratio = FTE Salary/Market Rate

Salary Alignment Report



Action History Report

- Action History Report - Lists all Employees affected by each of the Job Actions chosen by the report user.

  Filters: Employee Name, Employee ID, Department, Bus Unit, Job Function, Salary Grade, Job code, HR Status, Reg/Temp, Full/Part Time

  – Report includes:

    - Employee ID/PID, Employee Full Name, HR Status, Job Family, Pay Group , Description, Job Code Description, Action Date and Description, Primary/Secondary Job Info, Salary Grade, Full/Part Time, Position, Description, Pay Information: Annual Rate, Pay Increase, Pay Increase %

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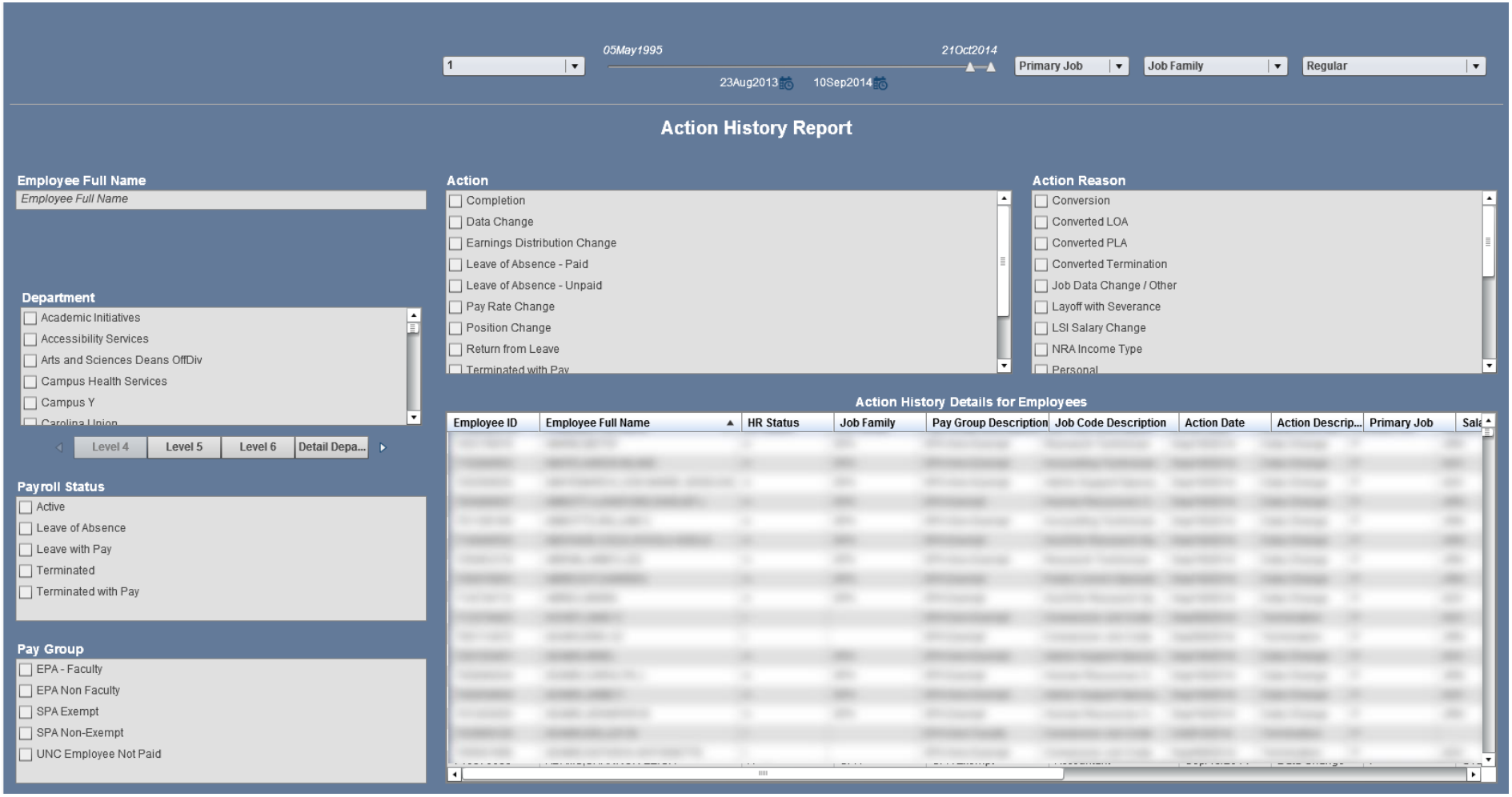
Action History Report



Active Faculty Report

- Active Faculty Report - List of Active Faculty is generated based on HR Status/Primary Job and Job Functions.

  Filters: Business Unit, Position, Academic Rank, Department, Job Code

  – Report provides:

    - Department Description, Employee Full Name, Job Code Description, Academic Rank Name, Department Entry Date, Job Entry Date, Position Entry Date, Full/Part Time

Active Faculty Report

Employee Academic Rank Report

- Employee Academic Rank Report -Report provides Academic Rank information of the employees based on the selection of HR Status, Primary or Secondary Job and Job Function description.

  Filters: Employee ID, Business Unit, Position, Academic Rank, Department, Job Code

  – Report provides:
    - Employee Full Name, Employee ID/PID, Department Description, Job Code Description, Academic Rank, Academic Rank Name, First Start Date

Employee Academic Rank Report

FTE Info for ACA Report

- FTE Info for Affordable Care Act – For Affordable Care Act purposes, this report shows the FTE information.

  Filters: Employee Full Name, Department, Business Unit Desc, Academic Rank Name

  – Report provides

    - Employee Full Name, Department Description, Academic Rank Name, Expected Job End Date, FTE

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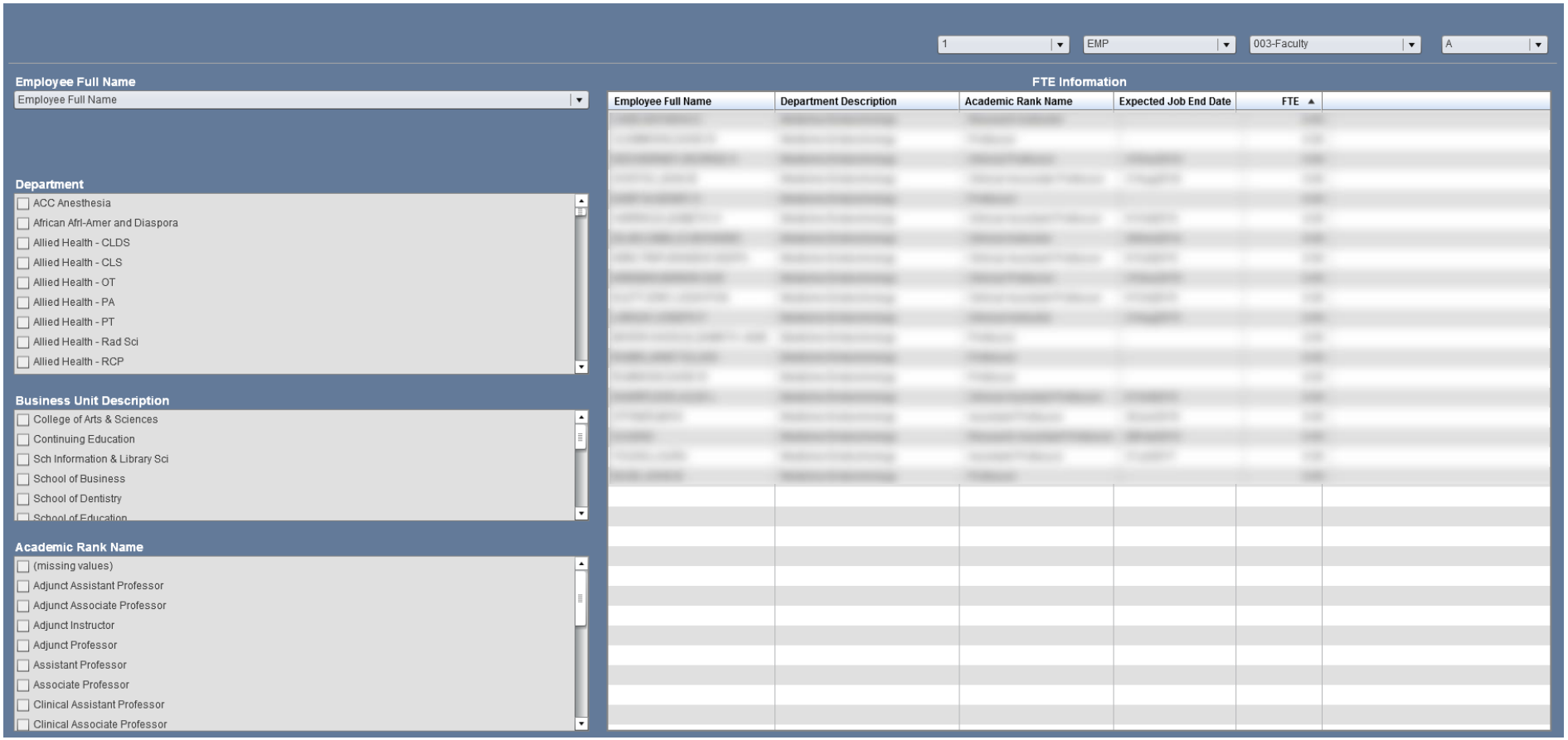
FTE Info for ACA Report



Faculty Zero Salary Zero FTE Report

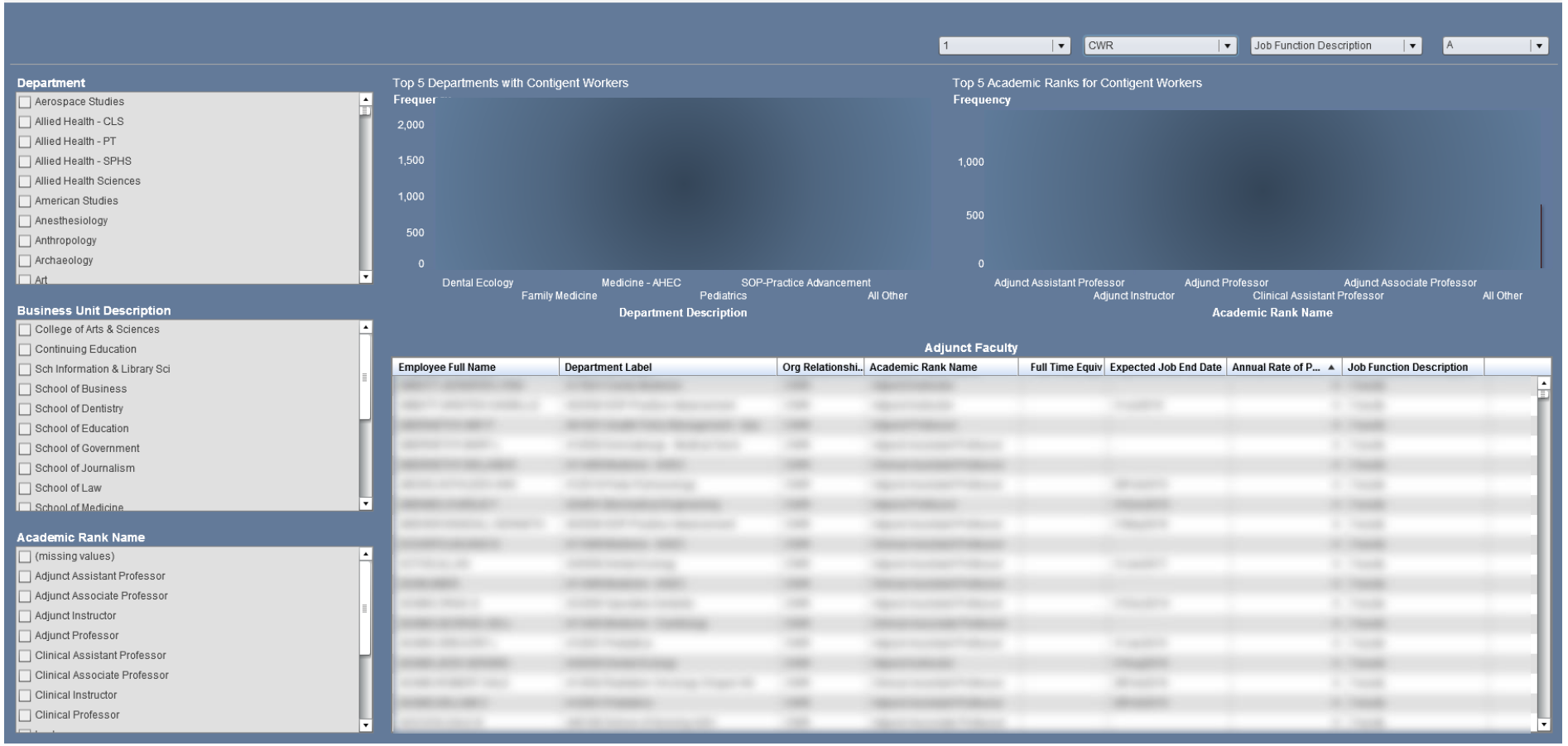
- Faculty Zero Salary Zero FTE Report – Faculty zero salary Zero FTE's are contingent workers identified by their organization relationship type and FTE information.

  Filters: Department, Business Unit Desc, Academic Rank Name

  – Report includes:

    - Employee Name, Department Label, Organization Relationship (Contingent Worker: CWR), Academic Rank, Full Time Equivalent, Expected End Date, Annual Rate., Job Function Desc

Faculty Zero Salary Zero FTE Report



Hire Report

- Hire Report – Consists of Total Hires, Gender Ration, Ethnicity Hire Ratio and Hiring Activity by Year.

  Filters: Action, Action Reason, Pay Group, Payroll Status

  – Report includes:

    - Employee ID, Employee Name, HR Status, Job Family, Action Desc, Effective Date, Action Reason, Pay Group, Job Code Desc, Primary, Position Desc, Salary Grade, Part/Full Time
    - Ethnicity Ratio based on NC IPEDS – Integrated Postsecondary Education Data System

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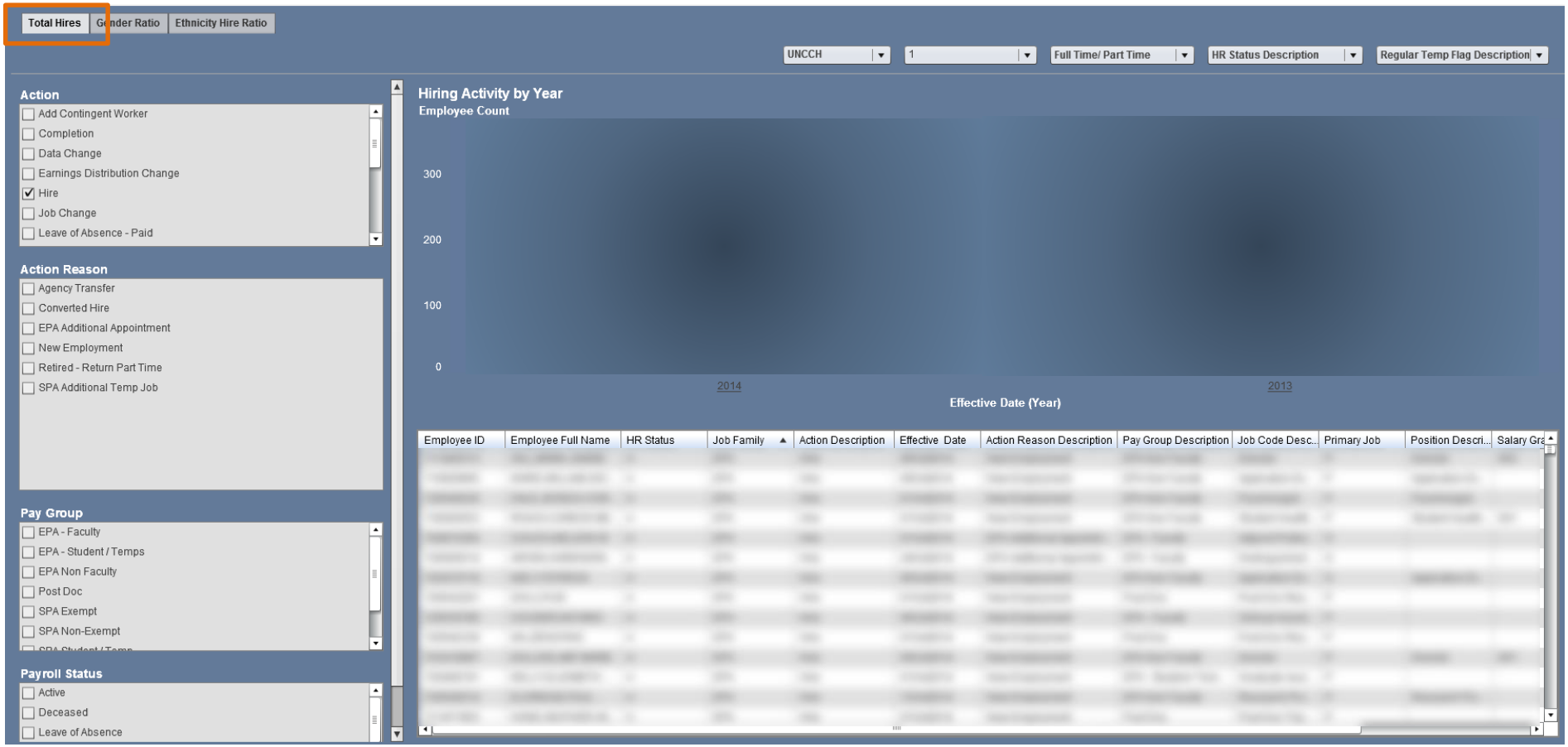
Hire Report



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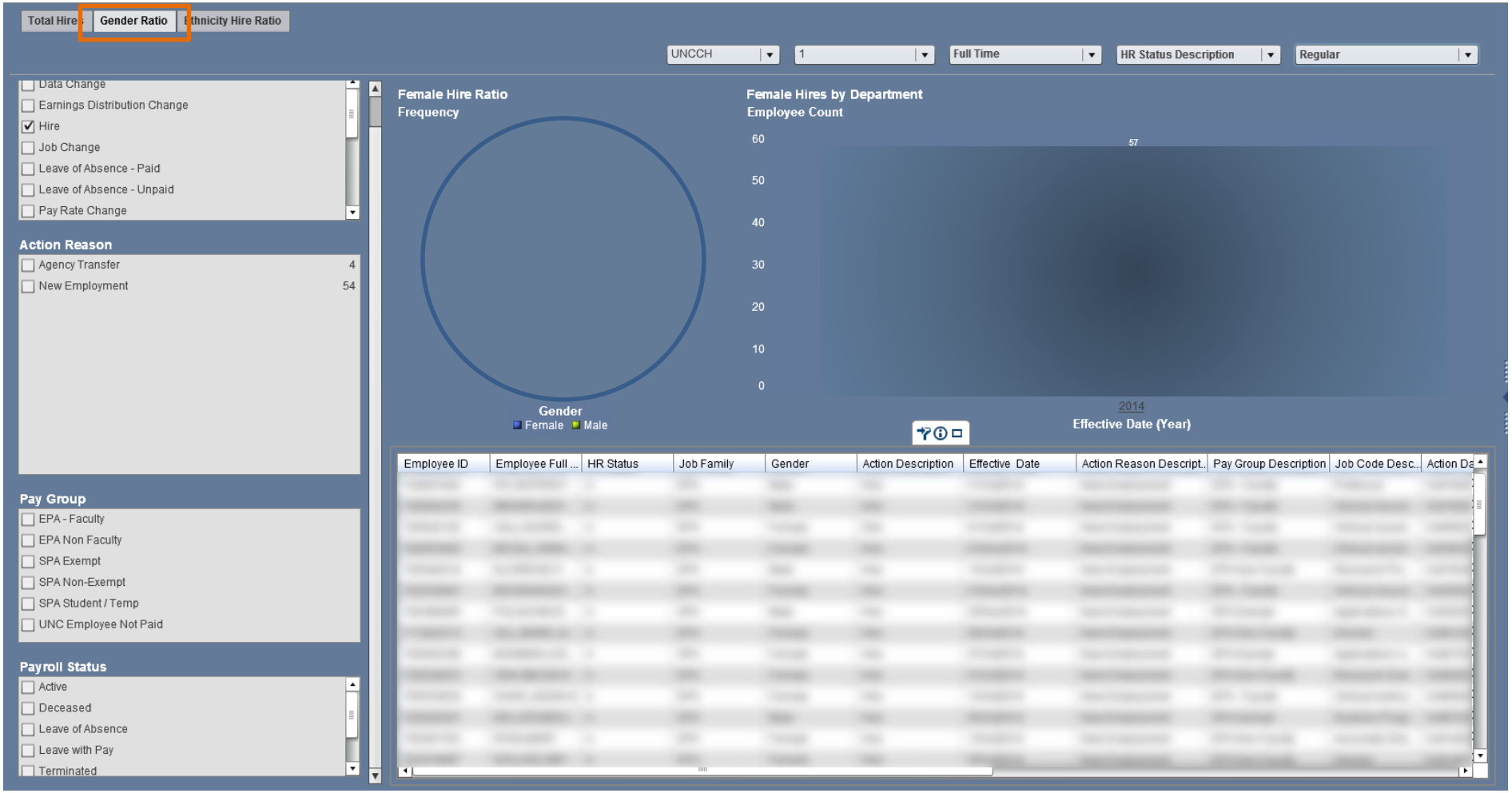
Hire Report



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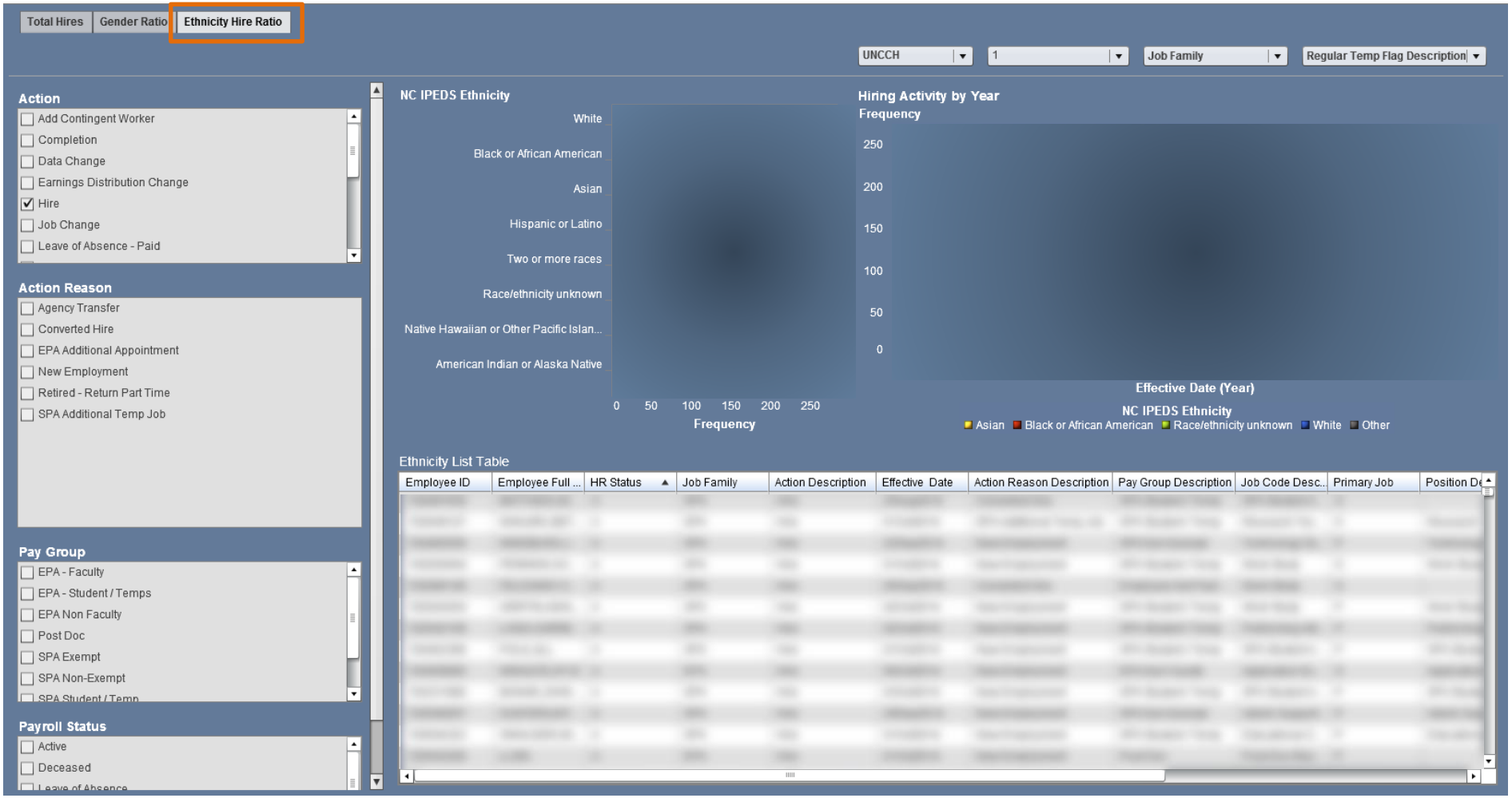
Hire Report



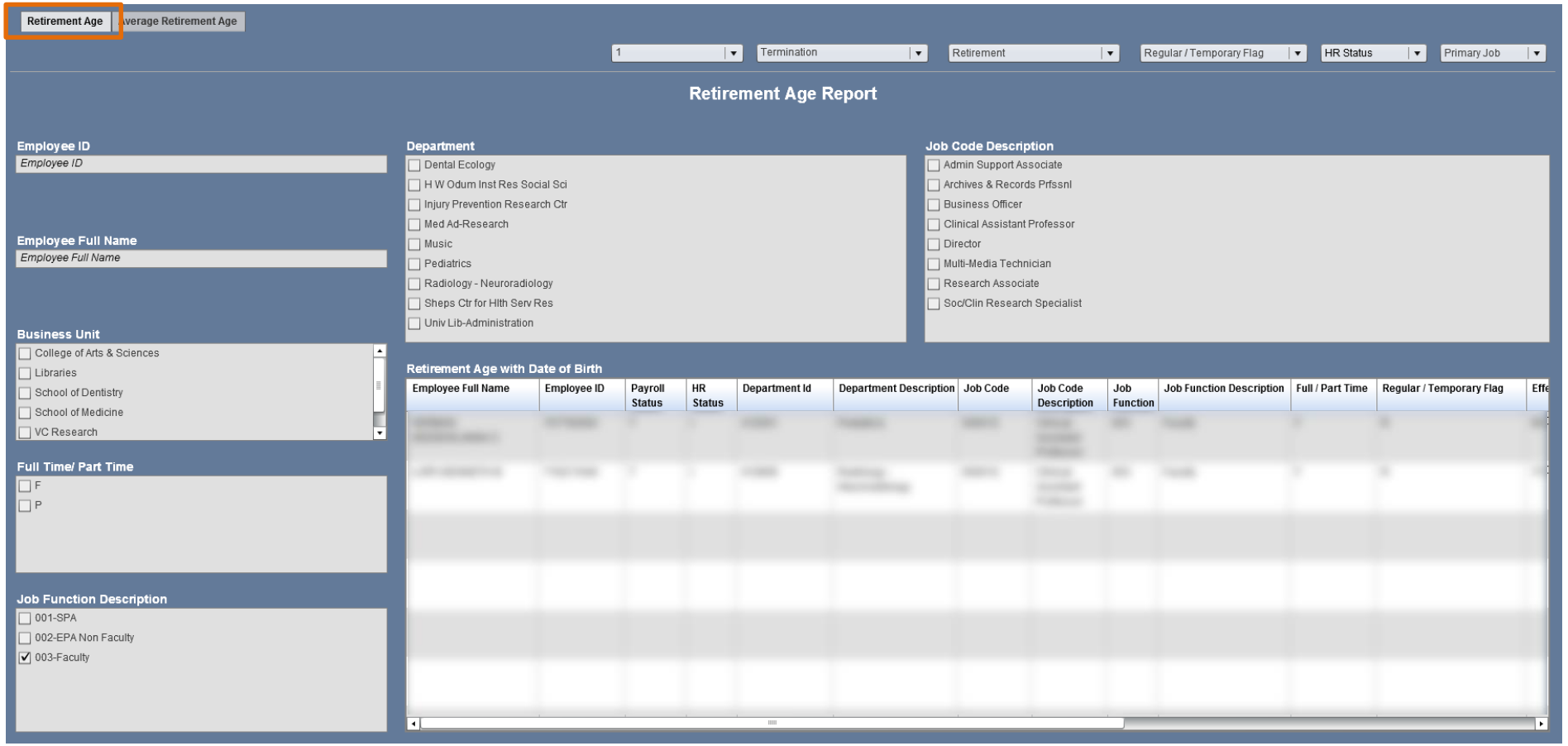
Retirement Age Report

- Retirement Age Report- age at the time Retirement is computed. Action Desc is chosen as 'Terminated' and Action Reason Desc is defaulted to 'Retirement'.

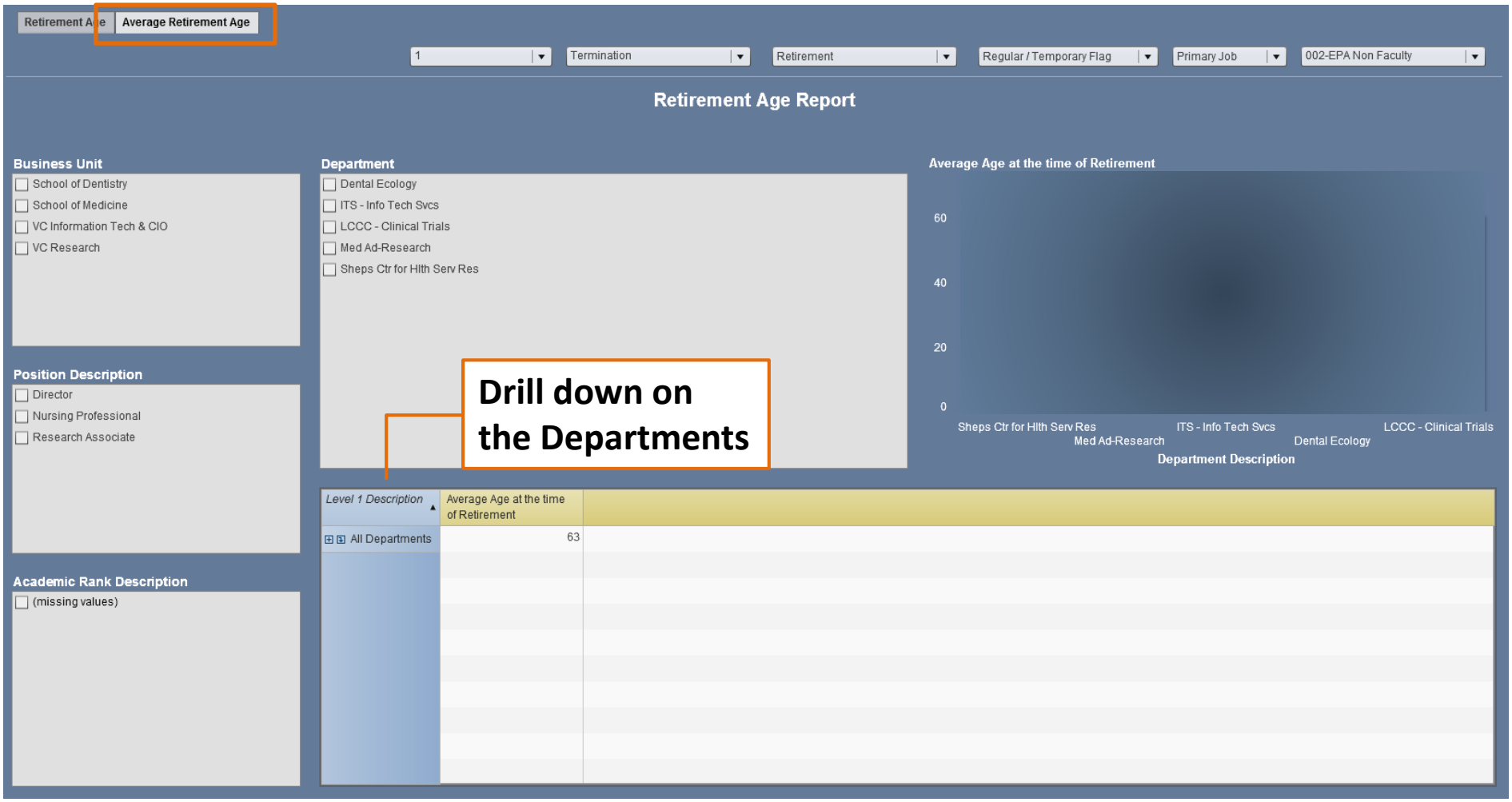
  Filters: Employee ID, Employee Name, Bus Unit, Full/Part time, Job Function Desc, Department, Job Code Desc

  – Retirement Age:
    - Employee Name, Employee ID, Payroll Status, HR Status, Department ID, Job Code, Job Code Desc, Job Function, Job Function Desc, Full/Part time, Regular/Temp flag, Effective Date, Faculty Tenure Status, Tenure Track Start Date, Tenure Granted Date, Date of Birth, Action Date, Age at the time of Retirement

Retirement Age Report



Retirement Age Report



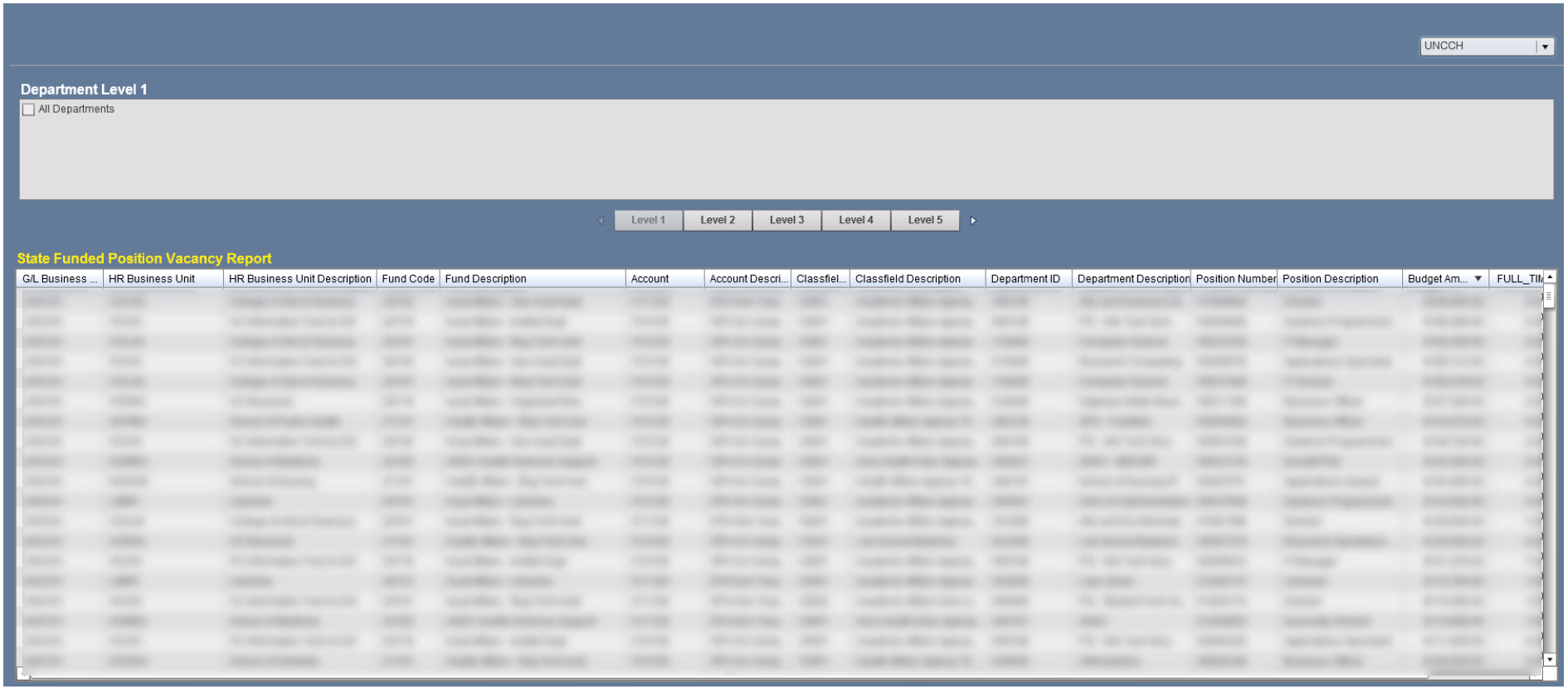
State Funded Position Vacancy Report

- State Funded Position Vacancy Report- Provides a report of State Funded vacancies by Business Unit and Department.

  Filters: Full/part Time, HR Status, Primary, Job Function Desc

  - Report includes:
    - HR Business Unit, HR Business Desc, Fund, Source, Account, Department, Position, Position Desc, Budget Amount, Full time Equivalent.
    - State Fund range for UNCCH 20101-22193. State Fund Range for UNCGA 10100-15199.

State Funded Position Vacancy Report



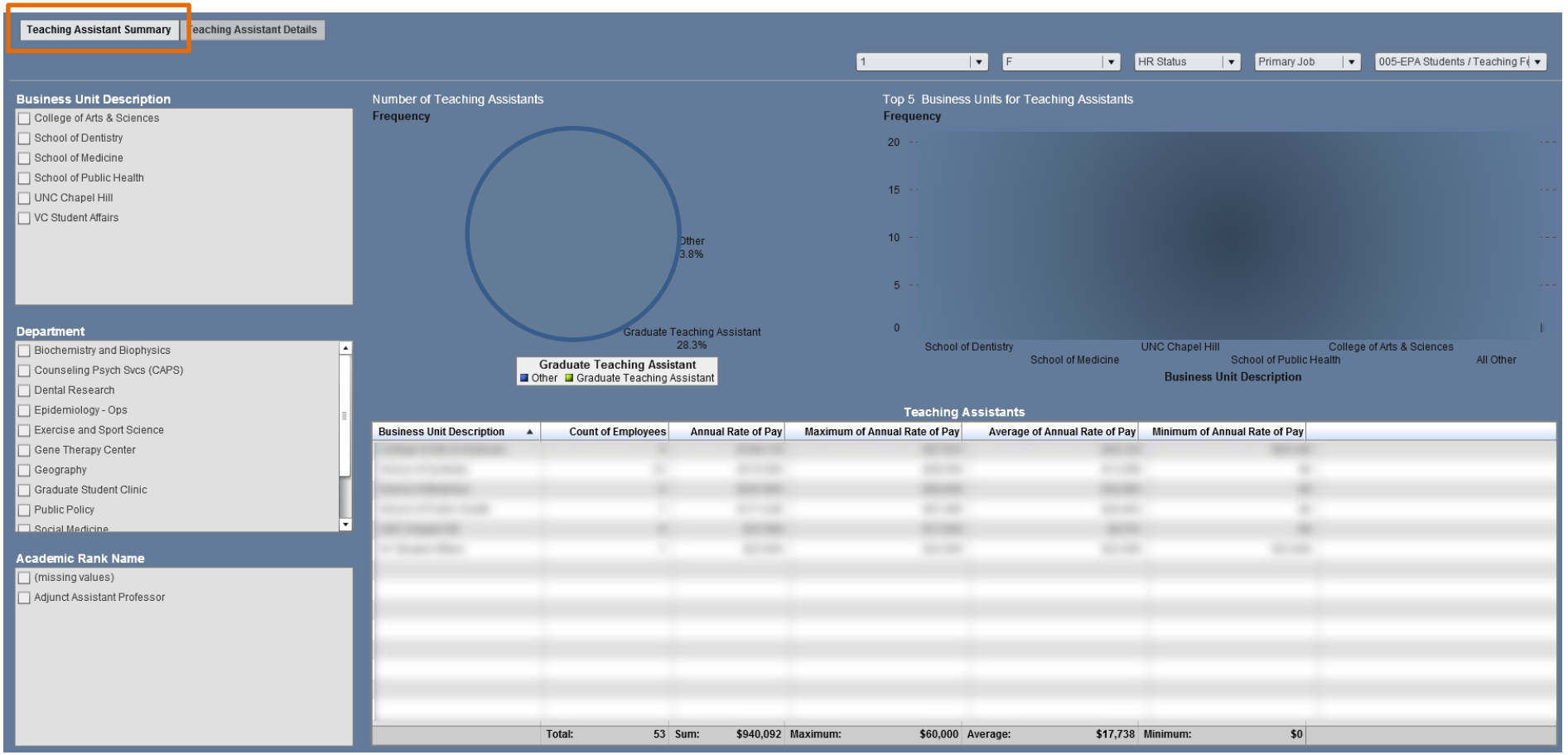
Teaching Assistants Report

- Teaching Assistants Report – Summary of Graduate Teaching Assistants at the various Business Unit levels.

  Filters: Full/part Time, HR Status, Primary, Job Function Desc

  - Teaching Assistant Summary:
    - Bus Unit Desc, Count of Employees, Annual Rate of Pay, Max of Annual Rate of Pay, Avg of Annual Rate of Pay, Min of Annual Rate of Pay
  - Teaching Assistant Details:
    - Bus Unit Desc, Employee Name, Department Label, Annual Rate of Pay

Teaching Assistants Report



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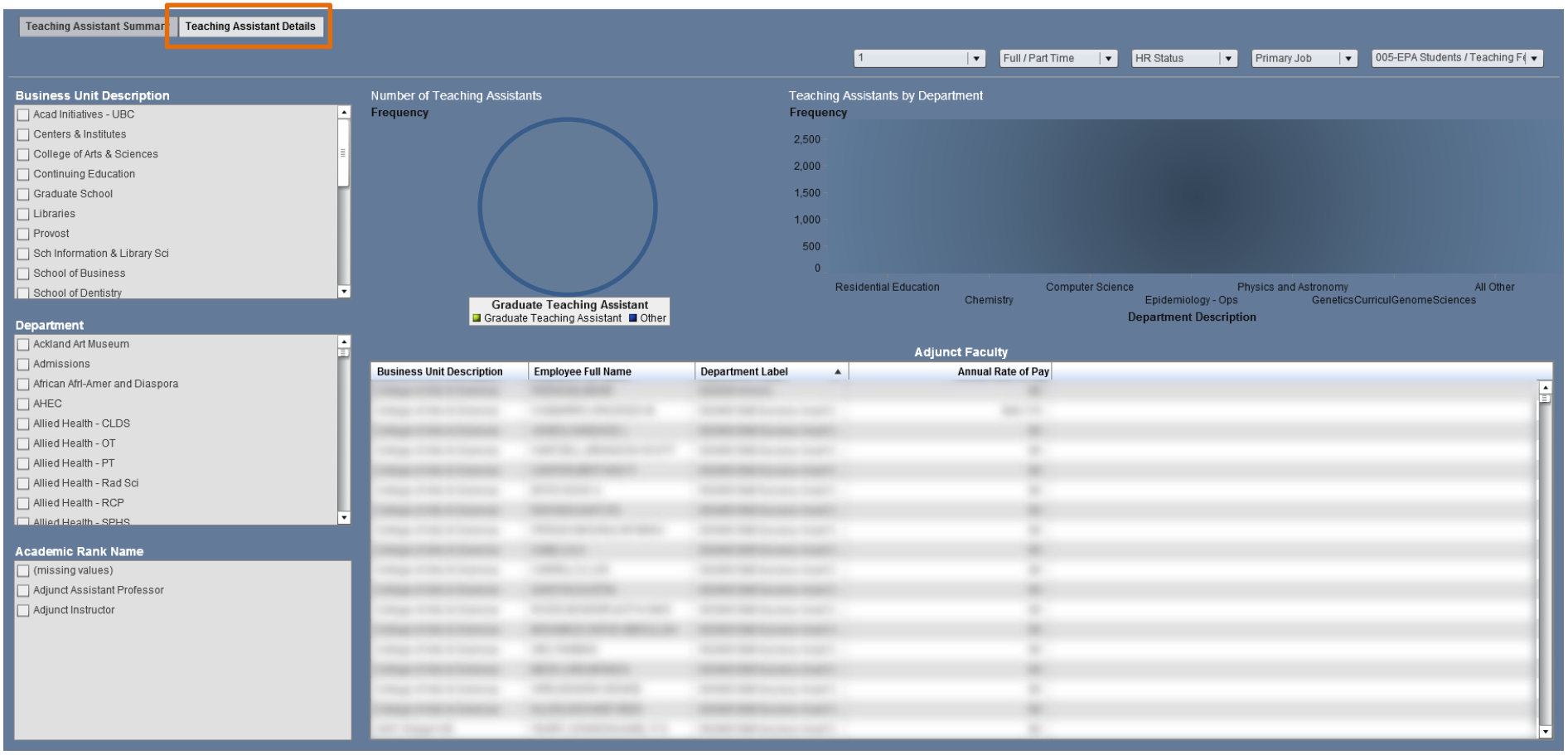
Teaching Assistants Report



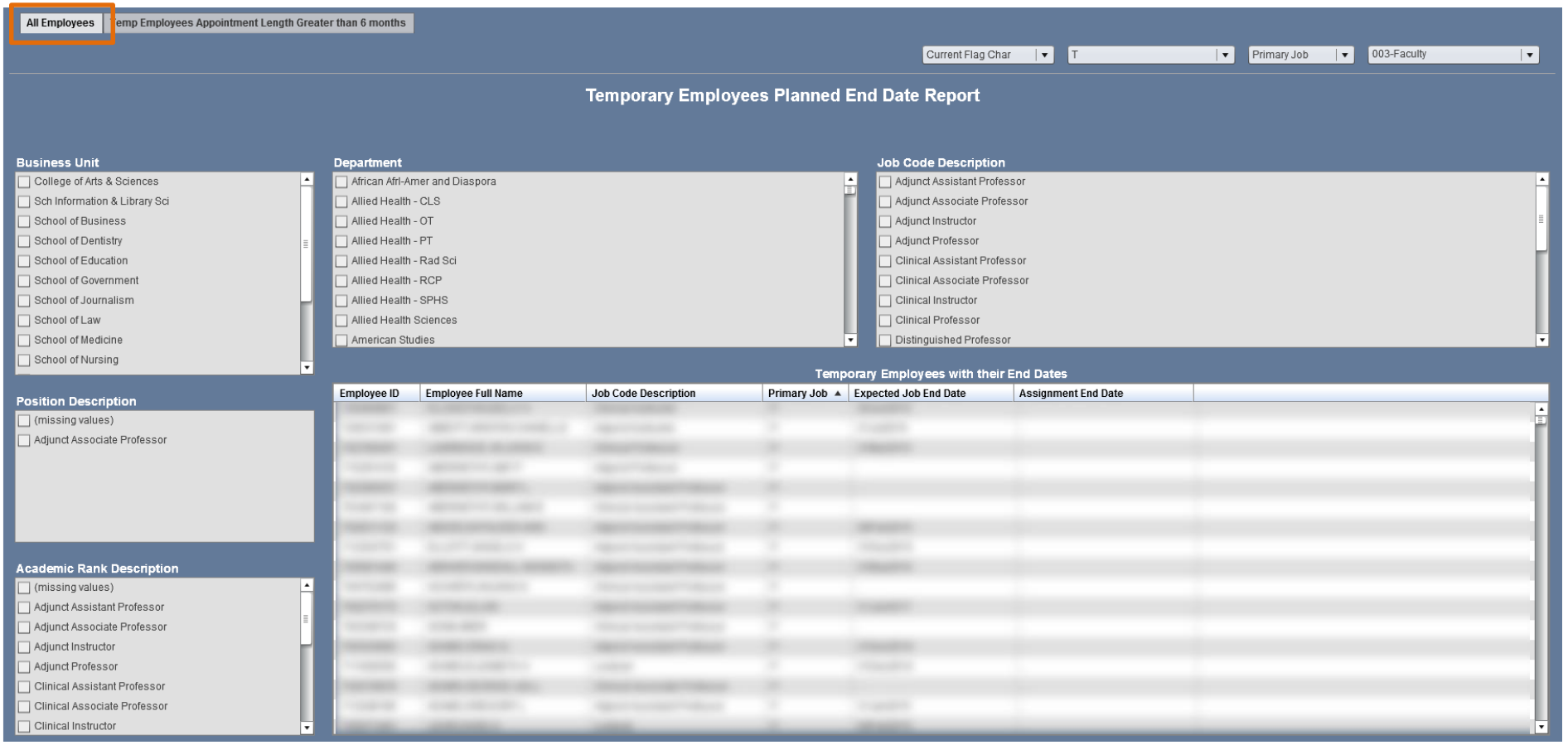
Temporary Employees Planned End Date Report

- Temporary Employees Planned End Date Report – Will show end dates for the various job functions including SPA Students, EPA Students/Teaching Fellow, Post-Doc, Clinical Fellows/Residents and Faculty.

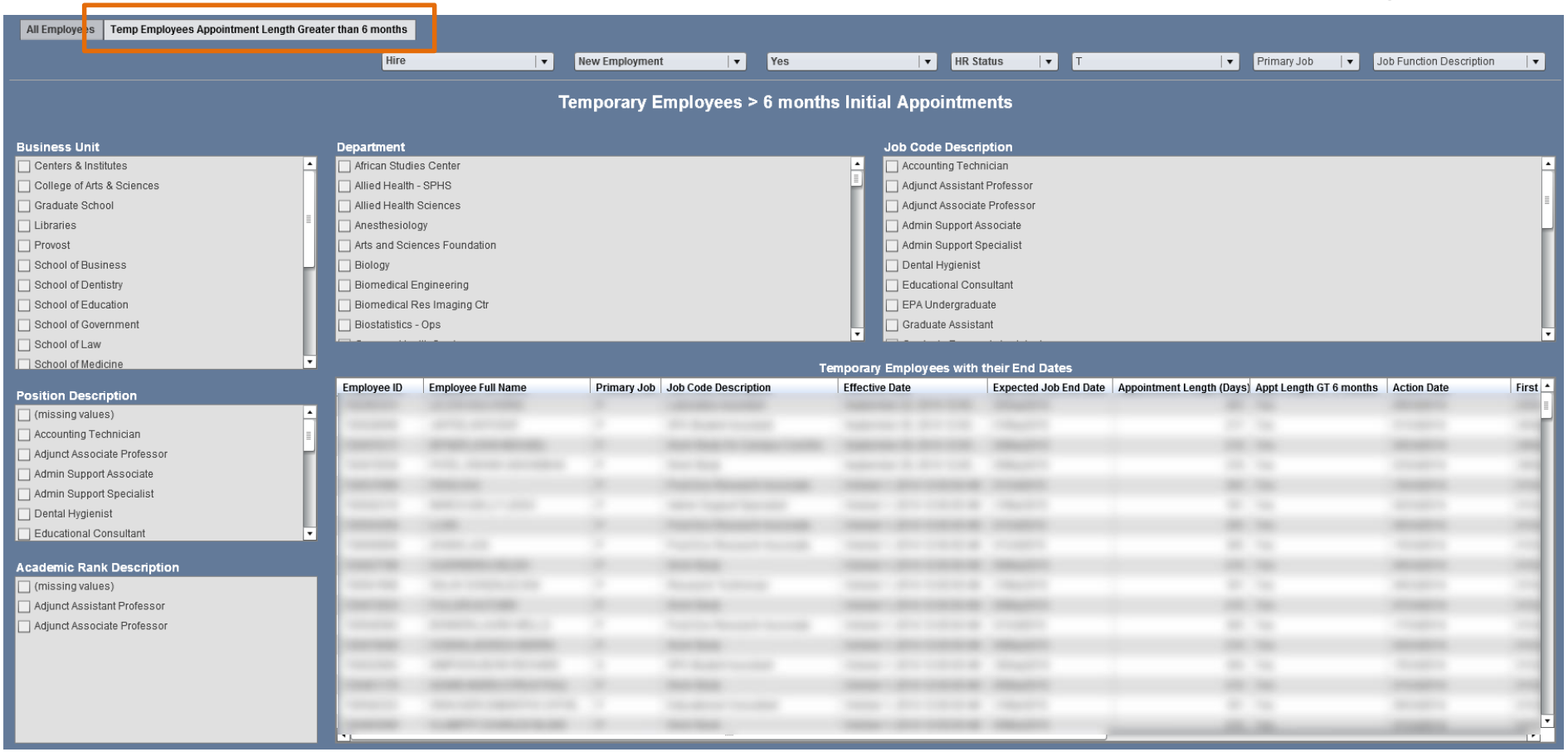
  Filters: Business Unit, Department, Job Code Desc, Position Desc, Academic Rank Desc

  - All Employees Tab
    - Employee ID, Name, Job Desc, Primary, Expected Job End Date, Assignment End Date
  - Temp Employees Appointment Length GT 6 months Tab
    - Employee ID, Name, Primary, Job Desc, Effective Date, Expected Job End Date, Appt length Days, GT 6 mo., Action Date, First Assignment Start, First Start date, Last Assignment Start Date, Last Start Date, Assignment End Date

Temporary Employees Planned End Date Report



Temporary Employees Planned End Date Report



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- Use Lynda.com to brush up on EXCEL skills
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  - CCINFO Home Page

  Both will allow you to navigate to a single sign-on page where you will use your onyen.
- Learning how to…
  - Excel Pivot Tables in Depth.
  - Broken down into chapters that consists of several, 5 minutes or less, tutorials.

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