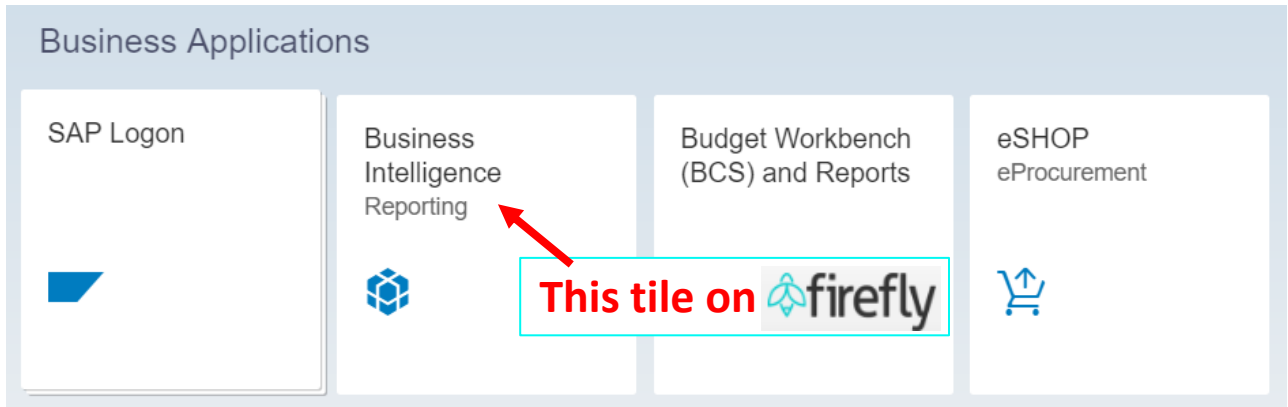


# Business Intelligence Reporting

Where?



## Why Run Business Intelligence (Portal) Reports?

- SAP data is refreshed nightly.
- Reports can be customized with just the data you need and include many fields not readily available in SAP reports.
- Reports can be easily downloaded to Excel or as a pdf.
- Financial reports can be run on both cost centers and WBS elements.
- Financial reports automatically exclude benefits on state aided cost centers and display revenue or budget where appropriate depending on the color of money.
- HR reports can be run for individual org units or for an entire group of org units using the built-in hierarchy function.
- The Portal includes many HR reports that are not available in SAP.

Quick Tips

- To Enter Multiple Values – separate single values with ; and use “ – ” (space dash space) for ranges
- To Remove a Master Data Field –Right click on the column header then choose display and uncheck the field you want to remove.
- To Remove a Detail Field – Click the field name in the header and drag it off until you see an X.
- To Change the Sort – Drag the field you want to sort by to the left until you see a bar at the edge
- To Filter on a Single Value – Right click on value you want and click Filter
- To Filter on Multiple Values – Right click on field header > filter and select multiple valules
- To Change the Format of a Displayed Cell – Right click on header > Display
- To Add Additional Fields – Right click on the key field header > Attributes then check field(s)
- To Export to Excel – Click the “Export to Excel” button
- To Save Selection Criteria – Click the “Save As” button on the selection screen
- To Create Bookmark (custom display) – Click the Bookmark icon, give it a name and hit save.

Click here for:

- Videos
- User Guides
- Newsletters

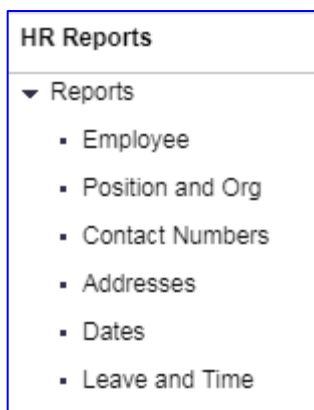


# Business Intelligence Reporting – HR Reports


While HR reports in SAP are limited, the Portal provides quick access to your HR data in a user-friendly, flexible environment. The HR Reports include data from the HR/Payroll module in SAP and each report contains multiple tabs that further categorize the data presented. The Employee reports present data from the Personal tab in SAP and Position and Org reports contain data from the HR Data tab in SAP. The other report options bundle data into specific categories to help departments pull frequently used data efficiently.





Under the HR tile:




## The Org Unit Hierarchy

General Variables	
Variable**	Current Selection
* Org Unit	+50000003(0ORGUNIT 

The HR reports are all org unit based and work with the orgunit hierarchy. Click the box on the right and open twisties until you find the orgunit you need. If you add an orgunit with a twisty, it will include it and all the org units underneath it. It will display on the Selections pane with a tree icon. 

- ❖ The entry screen for HR Reports has several useful fields that allow users add criteria to limit results. For example, Employee Subgroup of J1;K1 produces a list of tenure/tenure track faculty or D1 for Grad Assistants. To see the available values on any of these fields, click the box to the right of the field. 

 **Employee and Position and Org reports display SAP data from the main screens in SAP, with tabs for data from specific infotypes.**

## Employee Reports

General Overview | Objects on Loan | Education and Training | Qualifications | Training/Certification/Awards

These contain data from the Personal tab under HR Master Data (PA20) in SAP. Click the different tabs – General Overview , Objects on Loan (IT40), Education and Training (IT22 and 35), Qualifications and Training/Certification/Awards (IT24 and 35) to access the data from the corresponding infotypes.

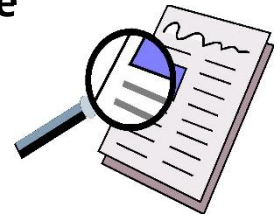
## Position and Org Reports

Position Values | Approval Relationships | Basic Pay | Current Appointments | Unpaid Appointments | Salary Cost Distribution

These contain data from the HR Data tab under HR Master Data (PA20) in SAP and has separate tabs to display the data on different infotypes – Position Values (IT1), Basic Pay (IT8), Current Appointments (IT9001), Unpaid Appointments (IT9001) and Salary Cost Distribution (IT9027). Approval Relationships pulls in the main approval types (Leave, Travel and Reports to).

# HR Reports – Continued

**Contact Numbers, Addresses, Dates and Leave and Time** include custom reports designed to assist departments with pulling consolidated data for their employees to meet specific departmental reporting needs.



## Contact Numbers Work Phone Emergency Contact

These produce both Work Phone and Emergency Contact lists by orgunit(s).

## Addresses Work Address Current Address Permanent Address

These produce Work, Current and Permanent Address lists by orgunit(s).

## Dates Birthdays Service Dates Date Specifications Monitor Tasks

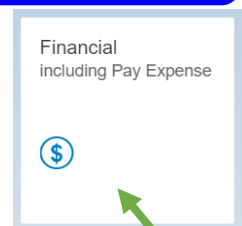
This tab includes both custom date reports (the popular Birthday and Service Dates) as well as data SAP HR – Date Specifications (IT41) and Monitor Tasks (IT19). To see all of the date types on Date Specifications, click on the All Dates button at the top right of the report.

## Leave and Time Leave Usage Leave Balances Attendances

These reports provide Leave Usage and Balances for all employees. Attendances only displays bi-weekly paid employees.

# Business Intelligence Financial Reports

The financial reports are split into 3 types – Core Reports, Summary Reports and Pay Expense Detail. Many of these reports mirror existing SAP reports but can work on all cost objects at the same time. A few to highlight are:



Choose this tile

## Compare payroll, financial and position data in one report

### [Financial](#) > [Core Reports](#) > [Salary Balances](#)

Pulls together payroll, budget, commitment and financial data by employee and position. Helps with comparisons between budget and actuals by GL group.

## Create one report for both WBS Elements and Cost Centers in the Portal

### [Financial](#) > [Core Reports](#) > [Combined Summary \(one example\)](#)

Can run all colors of money at same time. Includes benefits only on responsible cost objects and includes either budget or revenue depending on type of cost object.

## Compare permanent and temp budget to actuals in the Portal

### [Financial](#) > [Core Reports](#) > [Summary by Fund Type](#)

Similar to the Administrative Summary but shows original budget and any changes (temp or perm) along with actuals and commitments to display balances by cost object.

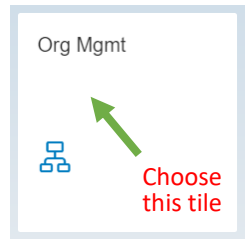
## Pull Detail on Specific Doc Types (example KJ's for PCard transactions)

### [Financial](#) > [Core Reports](#) > [Actual Expense Detail](#)

Detail Line Item on Portal includes filter by Doc Type on the main criteria screen.

# Portal Reporting – Org Mgmt Reports

The org management reports display data about positions that are set up in SAP's org management module under a specific orgunit. These represent staff positions that have been classified by Human Resources as well as approved faculty positions. Pooled positions such as graduate assistants, student workers and volunteers/affiliates may also be set up.



- ▼ Reports
  - Positions
  - Relationships
  - Org Units

All org management reports pull positions for specified orgunit(s) and key date, which allows for both current and historical reporting. The orgunit hierarchy feature allows reporting on entire areas or specific orgunits.

## Position Reports

Overview Counts Filled Unfilled Occupation Details

- Overview – basic position data for all positions in specified orgunit(s)
- Counts – counts and FTEs for both occupied and unoccupied positions
- Filled – basic information plus holder on filled positions
- Unfilled – basic information on unfilled (vacant) positions
- Occupation Details – detailed master data for all positions (used for a variety of institutional reports)

## Relationships Reports

Managers Leave Approvers Time Approvers Travel and Nontravel Exp Approvers Responsibility All Unoccupied

- Managers – reports to relationship for all positions in specified orgunit(s)
- Leave, Time and Travel/Nontravel Approvers – various approvers for all positions
- Responsibility – relationships specific to SAP workflow
- All – most commonly used relationships
- Unoccupied – positions where either the approver or holder of a related position is vacant, which may cause workflow problems.

## Org Units Reports

Overview Counts Manages/Chiefs Delegated Mgmt ePAF Approvers Hierarchy

- Provides information about various relationships that are org unit based rather than position based.
- The hierarchy tab shows the org unit in UNL's structure but only displays the top 4 levels. Keep opening the twisty of the bottom org unit to go deeper.