HR Reports for Managers

Purpose: The purpose of this document is to provide the steps to:
- Access the personal information of direct reports
- Run reports to view position information on direct reports
- Run a report to view reporting relationships

Audience: Reports to Managers

Prerequisites: Log into the MyUofC portal.

Note: Access to Manager Reports is provisioned automatically to all Reports to Managers and no additional security role is required, nor is a SecurID required.

Quicklinks:
- Click the links below to navigate directly to that section in this guide:
  - Access a Direct Report’s Personal Information
  - Run HR Manager Reports (HR Data Mart)
  - Run the UC Position Reporting Inquiry

Access a Direct Report’s Personal Information

1. From the myUofC portal, click My work.
2. Under the People management header, click Manager self service.
3. On the **Manager Self Service** page, click the **My Team** tile.

4. On the **My Team** page, click the drop-down arrow next to an employee’s name to view additional information. **Note**: If you have a manager reporting to you, you can click in the **Directs/Total** column to view their direct reports.

5. In the **Actions** menu, select **View Employee Personal Info**.
6. Review the employee information.
7. To view employee personal information, such as address, email, and phone numbers, click the links in the Additional Information section.

Note: Employee emergency contact information is not available to Reports to Managers. Contact your HR Services representative for assistance.

Run HR Manager Reports (HR Data Mart)

HR Manager Reports are a group of reports that provide Reports to Managers with the following information:

- **Employee Job Details**: Grouped by Reporting Manager, provides a profile of all active job records for employees within the reporting structure of the Manager.
- **Employee Leave Balances – Details**: Grouped by Reporting Manager, provides current balance details (in hours) for vacation, sick time, compensatory time off (CTO), or flex time for employees, with a calculation of the resulting liability.
- **Employee Leave Balances – Summary**: Grouped by Reporting Manager, provides a consolidated summary of current hours balances for CTO, flex, sick (100% and 70%), and vacation, with the corresponding liability.
- **Absence Summary Report**: Summary or detail report which lists employees within the reporting structure of the Manager who reported (and were approved for) time away during the period selected. Absences include:
  - Appointment under 2.5 hours
  - Sick leave
  - Family Illness
  - Personal Leave Day
  - Vacation
  - Voluntary Flex Leave (MaPS)
- **Position Vacancy Report**: Displays vacant positions. This report will soon only be available to budget owners and Finance Partners. To view your position information, run the UC Position Reporting Inquiry.

These reports are sourced from the HR Data Mart, which is refreshed on a nightly basis with information from PeopleSoft.

Access these reports with the following steps.
1. On the **Manager Self Service** page, click the **My Team** tile.

2. On the Manager Insights page, there are four available reports. Click the title of each report to access the information:
   a. Vacation Liability
   b. 12 Month Rolling Absences
   c. CTO by Month
   d. Cost of Additional Hours

3. Click the title of the report to run.

4. Most manager reports generate pre-defined output and do not require that you select criteria. However, if required complete the criteria selections.

5. Click the **Run Report** button.

**Note:** The **Run Report** button becomes active only when all required fields are populated.
6. To export your report, click the View icon at the top right corner.
7. To export the report to a PDF document, click View in PDF Format.
8. To export to Excel, click View in Excel Options and select one of the options from the menu:
   a. View in Excel 2007 Format will present the data in the same format as displayed online.
   b. View in CSV Format will export the data into columns to allow for filtering and manipulation.

Note: If you have trouble extracting to Excel, you may need to adjust your internet browser (IE) security options:
   a. Navigate to Tools → Internet options.
   b. On the Security tab, click Local intranet.
   c. Click the Sites button.
   d. Click the Advanced button.
   e. If you see a URL in the ‘Add this website...’ field, click the Add button.
   f. Click the Close button, then the OK button twice.
   g. Try extracting again.

Run the UC Position Reporting Inquiry

This is a report within PeopleSoft, which allows a manager to view information on who they report to as well as all jobs and positions that report to them (including vacant positions). In addition, managers can view the reporting relationships of all the direct reports within their reporting structure.

1. From the myUofC portal, click My work.
2. Under the People management header, click Manager self service.
3. Navigate to the UC Position Reporting Inquiry by following the menu path: **Manager Self Service → Job and Personal Information → UC Position Reporting Inquiry**

4. Review Report:
   a. Your job information is located under **Position Details**.
   b. **This Position Reports To** section shows the details of the individual you report to.
   c. **Reporting to This Position** section shows those individuals who report to you including the following information:
      i. Position number (Note: a ‘V’ in front of the position number indicates a vacant position)
      ii. Empl ID and Empl Record
      iii. Department (ID and description)
      iv. Business Title
      v. Job Code Description
      vi. Employee Name
   d. Click the **Reporting Relationships** icon to the right of any individual for details on who that individual reports to and whether the individual has direct reports.