Site: [oac.ku.edu/analytics](https://oac.ku.edu/analytics)

Navigation: OAC Home Page > Human Resources tab or Dashboards Drop Down

Source of Data: HR/Pay System and FITC (Approps and ARSPs)

Data Catalog: OAC Home Page > Welcome tab

OAC Training: OAC Home Page > Training tab

HR/Pay Training Guides: <http://humanresources.ku.edu/hrpay-resources>

Security: Statement and Use of Data on Single Sign-On page. OAC Usage Agreement on OAC Home Page > Welcome tab. Access to restricted columns, such as Employee ID and Birthday, is based on position duties and individual ID.

Dashboard Pages

|  |  |
| --- | --- |
| Contact Info | * Similar to a directory listing, with additional fields for sorting. * BYO Contact List subpage allows you to choose up to 10 columns to create a custom list. * Current data only and you should only use for your department. |
| Job/Position | * Reports current and future dated job and position information for active employees, including future dated terms. |
| Funding | * Reports on current and future dated job, position, and funding information for active employees. * Position Pool ID Listing reports current and future pool ID information for vacant and active occupied positions, including current and future dated rows. |
| Dates | * Reports Probation, Administrative Review, Limited Term, Adjusted service dates, etc., for active, regular employees. |
| Position Management | * Reports current occupants or previous occupants if the position is currently vacant, and attributes about positions. * For future Pool ID changes see the Funding Dashboard Page. |
| Career Progression | * Reports job, department, and salary history for an employee * Need to use drop down boxes to select Page Criteria |
| Details | Active subpage   * Reports current and future dated job and position information for active employees, including future dated term information * BYO Active subpage allows you to choose up to 15 columns to create a custom report.   Inactive subpage   * Reports current information for inactive employees. |

Hints:

* Dashboard Criteria carries over through other pages with Dashboard Criteria sections.
* Page Criteria only applies to the page you are viewing.
* Click each ‘Apply’ button after each section you have selected criteria.
  + Dashboard and Page
* As of Date needs to have / between the Month, Day, and Year
* If entering name, the format is LastName,FirstName Middle

Hints (cont.):

* You can search on partial name and will bring back any name field with that value.
* Recommended to use the DropDown –Select Values box for better results
* If entering Position # entering leading zeros will narrow down the results
* Applied criteria will be returned in the lower part of the page.
* When exporting, criteria are summarized after data results.
  + If exporting – most common options:
    - Export>Formatted>Excel will bring only the data columns on the screen with spacer columns for sections
    - Export>Data>Excel keeps the leading zeros, will bring all the data columns even if excluded
    - Export>Data>CSV does not keep leading zeros, will bring all the data columns even if excluded
* To clear all and set back to all defaults use the Gear gear picture
  and Clear my Customizations (will clear all filters whether customized or not).
* To paste in multiple values from another source, use the prompt/filter search to open the selection box and click the pencil icon in the top, right corner. Please note values entered must match the source exactly.
* PCF Flag = P-Past, C-Current, F-Future (Historical data rows are not included.)

**Position Pool ID Listing Hints**

|  |  |  |
| --- | --- | --- |
| Vacant Positions | **Active** Positions on Pool | Hints |
| Y | Y | * This page criteria will display all vacant positions assigned to a Pool ID. * This is good for finding a vacant position for use and possible change to a Pool ID for reuse. * This will not show filled positions on the Pool ID. * This would not be a good combination if reviewing for funding change on a Pool ID. |
| NY | NY | * This page criteria will display all filled and vacant positions assigned to a Pool ID. * This is an option to be used if you want to change the funding on a Pool ID. |
| Y | N | * Displays all positions assigned to a Pool ID that do not have an incumbent. |
| N | Y | * Displays all active positions assigned to a Pool ID that do have an incumbent. |

|  |  |  |
| --- | --- | --- |
| DBT Status | Pool Table Status | Hints |
| I |  | Potential reuse of a Pool ID. |
|  | I | Potential reuse of a Pool ID but need to validate DBT. |

**Position Pool ID Page Criteria**

Position Pool ID – Search by a Pool ID name, can search/select multiple Pool IDs using a ‘;’ or use the Drop Down –Select Values box.

Vacant Positions – Position numbers that are assigned to a Pool ID that do not have an incumbent.

Positions on Pool – Position numbers that are active positions assigned to a Pool ID that do have an incumbent.

Override Deductions/Taxes – Able to locate Pool IDs that have an override on deductions and/or taxes. If the Override columns list a Y (Yes), please review in HR/Pay for details.

Project – Search by Project Number or Project Name. This will help locate Pool IDs associated with the desired Project Number/Name

Award – Locate Pool IDs associated with the Award Number or Award Name.

Project PI Flag – This will populate any Pool ID that contains funding with the PI indicator in CF3. These types of Pool IDs are rare.

Project PI Name – Locate any Pool IDs under the PI Name selected.

DBT Status – I (Inactive) is a good option to find Pool IDs that can be potentially reused but need to validate with the Pool Table Status,

Pool Table Status – I (Inactive) can also find potential Pool IDs to be reused but will need to validate the DBT.