

Employee Distribution Report

The **Employee Distribution Report** displays HR distribution details in a list format by Employee, Distribution Number, Distribution %, Distribution Chartstring, and Distribution Begin and End Dates

What can I learn from the Employee Distribution Report?

- Provides detailed information related to all employee distributions
- Allows for reporting at the Home Department level down to the individual employee level
- Allows for drill-through to **Employee Lookup Report**

Home Department/Date Filters

The **Employee Distribution Report** Range:

- 1 Enter a *range* for **Distribution Begin Date** and a *range* for **Distribution End Date**.

Setting these date ranges are the only **required** fields as notated by the red asterisk (*)

- 2 Optionally, filter distribution information by **Home Department(s)** (Home Dept ID)

In addition to required filters on the filter page (*), at least one conditional filter with an orange triangle (▲) must be selected

HR Codes Filters

Filter by the following optional **HR Codes**:

- | | |
|-------------------------------|--|
| 1 Personnel Program | 2 Appt Rpt Code |
| 3 Appointment Type | 4 Employee Status |
| 5 Specific Employee(s) | 6 Title Code, Title Unit Code, and/or Class Title Outline |

Report Specific Filters

You can further refine your data or display additional data using the options in the **Report Specific Filters** section:

- 1 Check the box(es) to **Show Detail Group 1 (a)** and/or **Show Detail Group 2 (b)** to display the corresponding additional data in the report:

a	Rate Code	Distribution Grade	Distribution Step	Annualized Salary	Annualized Pay Rate	CTO Class Title Outline	O/A	Work Study	Alt Home Dept ID	Supervisor ID
b	Length Of Service	Leave Accrual Code	LOA Stat	LOA Type	LOA Begin Date	LOA Return Date				

- 2 **Display Codes and Descriptions**
 - Display Codes Only (default)
 - Display Codes and Descriptions
 - Display Descriptions Only
- 3 **Current Distributions Only**
 - All (default)
 - Yes
 - No
- 4 Display distributions for selected **Supervisor(s)**
- 5 Filter by selected **DOS Code(s)**
- 6 Choose to display **Off** or **Above** scale only
- 7 Filter by **LOA** (Leave of Absence) **Type**, or all (default)

See the [Filtering and Running Reports in MyReports](#) job aid for additional information and tips & tricks for using the filters to configure your report criteria.

Distribution Chartstring Filters

Filter by optional **Distribution Chartstring Filters** as desired:

- 1 The **Account** and **Activity Pd** chartfields are not used in HR Distribution Data; additional filtering by these chartfields is unavailable

See the [Filtering and Running Reports in MyReports](#) job aid for additional information and tips & tricks for using the filters to configure your report criteria.

Employee Distribution Report

Report Output

- Choose your desired **Report Output Selection** of **On Screen HTML** (default), **PDF**, or **Excel** (1)
- Click the **Run Report** button (2)

1

Report Output Selection

☒ On Screen HTML

☐ PDF

☐ Excel

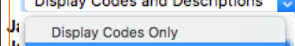
2


Run Report

[Clear](#) [Cancel](#)

▲ At least one of these fields must be selected

Working in the Report View

- You can use the **Display Codes & Descriptions** drop-down menu in the upper-left of the report header to change the report display:
- 
- Adding **Code Descriptions** *will expand report width considerably*. To print the report, we recommend you first choose **Display Codes Only**.
 - The **Employee Distribution Report** allows you to further refine your report using the **Sort 1** and **Sort 2** options:



- 1 Click the **Sort 1** drop-down and select the first value from the list
- 2 If desired, select a second from the **Sort 2** drop-down
- 3 Click **Update**

1. Click the dropdown arrow.

2. Select 'None'.

3. Click the 'Update' button.

Your report is refreshed and now displays data in your chosen groups with subtotals.

- You may also show and hide **Detail Groups** from within the report view:

Sort 1
None

Sort 2
None

☒ Show Detail Group1

☐ Show Detail Group2

Update

- 1 Check the box(es) to show and uncheck to hide the **Detail Group(s)** of your choice
- 2 Click **Update**; the additional columns display or are hidden when the report is refreshed

- Adding **Detail Groups** *will expand report width considerably*. To print the report, we recommend you first hide both **Detail Groups**.

- For example, to find all employees in a **Home Department** with the same **Title Code** using **Sort 1** and **Sort 2**:

The 'Sort' dialog box is shown with the following elements:

- Sort 1:** A dropdown menu currently displaying 'Home Department'.
- Sort 2:** A dropdown menu currently displaying 'Title Code'.
- Show Detail Group1:** An unchecked checkbox.
- Show Detail Group2:** An unchecked checkbox.
- Update:** A blue button at the bottom right.

Numbered callouts indicate the sequence of actions:

- 1: Click on the 'Sort 1' dropdown arrow.
- 2: Click on the 'Sort 2' dropdown arrow.
- 3: Click on the 'Update' button.

- 1 Click the **Sort 1** drop-down menu and select **Home Department**
- 2 Choose the **Sort 2** criteria **Title Code**
- 3 Click **Update** to refresh the report

Employee Name	Employee ID	Primary Title Code	Hire Date	Bus Unit
Home Department: 408040-F- FIN Controllers Office				
Title Code: 0218-FINANCIAL SVC MGR 1				
C. [REDACTED] L	024056434	0218	04/08/2013	SFCMP
J. [REDACTED] H	027873827	0218	09/08/2008	SFCMP
Title Code: 0219-FINANCIAL SVC MGR 2				
K. [REDACTED] H	026243592	0219	12/31/2007	SFCMP

- Click the links in the **Employee ID** column to view additional appointment and distribution information about a specific employee in the **Employee Lookup Report**

Employee ID
020422705

Tips & Tricks

- Narrow the report using the available **HR Code** and **Report Specific** filters
- Running the report for **Home Department** or **Distribution Dept ID** will return all of the *children* Dept IDs in the report
- Employee appointments with multiple distributions each display unique rows
- The **MyFavorites** functionality allows you to save and retrieve frequently used filter criteria. See the [Managing and Scheduling MyFavorites in MyReports](#) job aid for instructions on saving report parameters to **MyFavorites**, and how to select and run a saved Favorite.

Additional Information & Assistance

- More information about **MyReports** including how to request access and additional training can be found in the MyReports section of the [Controller's Office website](#)
- If you require help with a technical problem, or have a question about a specific report, contact the Controller's Office Solution Center at COSolutionCenter@ucsf.edu or 415.476.2126
- To stay informed about **MyReports** news, follow the directions on the MyReports section of the Controller's Office website to join the [MyReports ListServ](#)