Employee Appointment Report

UCSF

The **Employee Appointment Report** displays HR appointment details in a list format by Employee, Appointment Number, and Appointment Begin and End Dates.

What can I learn from the Employee Appointment Report?

- Provides detailed employee appointment information
- Allows for reporting at the Home Department level down to the individual employee level
- Allows for drill-through to Employee Lookup
- Highlights appointments with end dates within the next three months

Home Department/Date Filters

The **Employee Appointment Report** is run for the specified **Appointment Date Range**:

1. Enter a *range* for **Appointment Begin Date** and a *range* for **Appointment End Date**.

   Setting these date ranges is the only *required* field-notated by the red asterisk (*)

Appointment Date Range

Appointment Begin Date*
From Jan 1900   To   Dec 9999

Appointment End Date*
From Jan 1900   To   Dec 9999

2. Optionally, filter appointment information by **Home Department**(s) (Home **Dept ID**)

Home Department   Dept ID ▲
Level 2
Change Level
Add   Remove

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

HR Codes Filters

Personnel Program	1 - Professional and Support Staff
	2 - Management and Senior
	A - Academic

Appt Rpt Code	C-Covered
	S-Supervisor
	U-Uncovered

Employee ▲	
Title Code	
Title Unit Code	
Class Title Outline	

Appointment Type	1-Contract
	2-Regular/Career
	3-Limited
	4-Casual/Restricted
	5-Academic

Employee Status	I-Inactive
	N-Leave without pay
	P-Leave with pay
	S-Separated
	UNKNOWN

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

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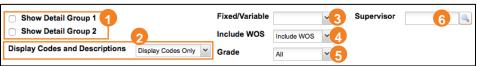3. **Appointment Type**
4. **Employee Status**
5. Specific **Employee**(s)
6. **Title Code, Title Unit Code,** and/or **Class Title Outline**

Report Specific Filters

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

☐ Show Detail Group 1	Fixed/Variable		Supervisor	
☐ Show Detail Group 2	Include WOS	Include WOS		
Display Codes and Descriptions	Display Codes Only	Grade	All	

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

a	CTO Class Title Outline	Ret. Code	Time Rpt Code	Leave Accrual Code	Appointment Duration	Appointment Rep Code	Alt. Department Dept ID	Supervisor ID

b	WOS Type	Elig OT	Work Study	Visa Type	Work Permit End Date	I 9 Date	E-Verify Date	E-Verify Status	UC W8BEN Date	Next Review Type	Next Review Date	Probationary Period End Date

2. **Display Codes and Descriptions**
   - Display Codes Only (default)
   - Display Codes and Descriptions
   - Display Descriptions Only

3. Display **Fixed** or **Variable** time – leave blank for both (default)

4. **Include WOS** (Without Salary)
   - Exclude WOS
   - Include WOS (default)
   - WOS only
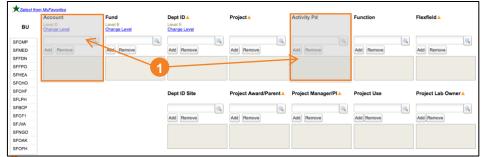
5. Filter for a specific **Grade** or **All** (default)

6. Display appointments for selected **Supervisor**(s)

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.

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Report Output

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

- Click the **Run Report** button (**2**)

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:
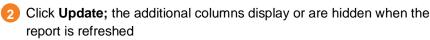

- Adding **Code Descriptions** *will expand report width considerably*. To print the report, we recommend you first choose **Display Codes Only**.

- The **Employee Appointment 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 grouping from the **Sort 2** drop-down

  3 Click **Update**

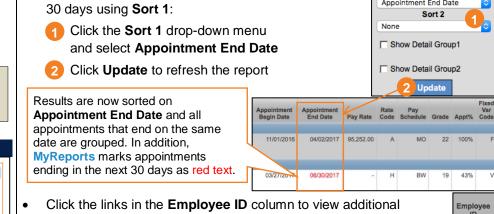 Your report is refreshed and now displays data in your chosen groups with subtotals.

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

  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 appointments ending in the next 30 days using **Sort 1**:

  1 Click the **Sort 1** drop-down menu and select **Appointment End Date**

  2 Click **Update** to refresh the report

Results are now sorted on **Appointment End Date** and all appointments that end on the same date are grouped. In addition, **MyReports** marks appointments ending in the next 30 days as red text.

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

Tips & Tricks

- The report can be narrowed using the many 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.

- For employees with multiple appointments, each **Appointment Number** is displayed on a unique row:

- 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