

AM007: Absence Management Reports

INTRODUCTION

The *Absence Management Reports Process Guide* describes the report processing steps that Timekeepers and Manager/Approvers will perform to validate monthly processing on the CI campus. This guide includes the general processing steps common for all AMSS reports using three valuable reports as examples.

- **SELECT A RUN CONTROL**
 - **RUN REPORTS**
 - **OPEN/SAVE REPORT**
 - **REPORT FIELDS**
 - a) Absence Activity
 - b) No Time Reported (No Leave Taken)
 - c) Reported Absences
-

Absence Management Reports

Timekeepers and Manager/Approvers have access to Absence Management reports based on the security structure defined for them within the Absence Management system.

In addition to the validations that occur at the time of entry in Absence Management Self Service, it is recommended that Absence Management activity is validated by the Timekeeper and Manager/Approver as part of their review.

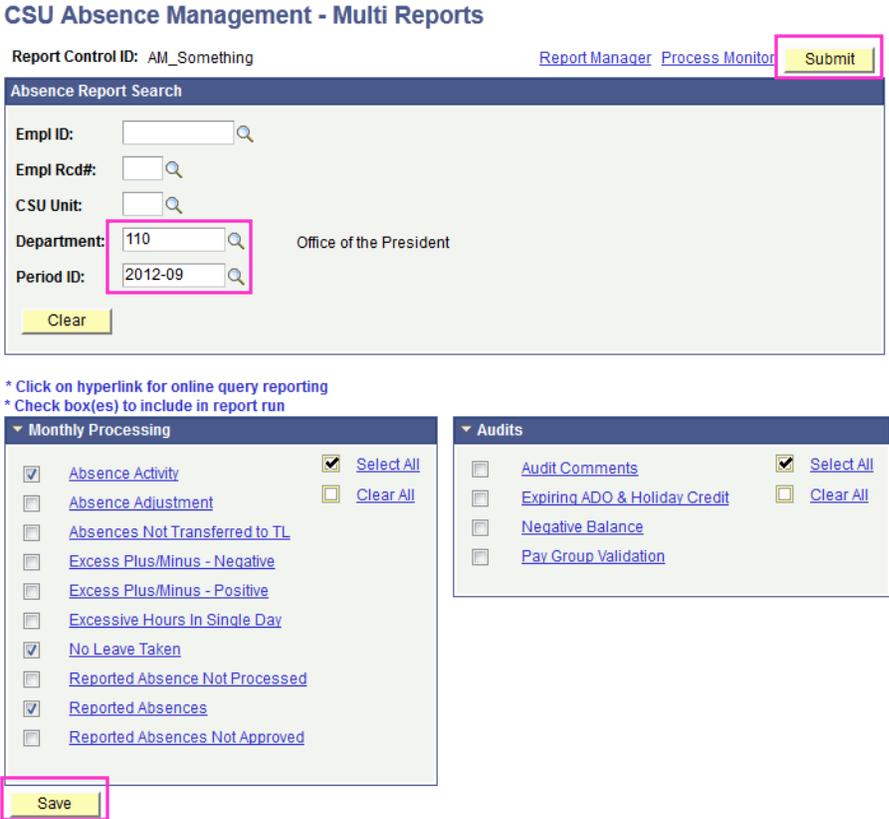
Manager Reports

- **Absence Activity** – Report is run by employee or department. Snapshot of Absence activity by employee. Includes Absences takes, balances, and adjustments.
- **No Time Reported (No Leave Taken)** – Report is run by department each Absence period. Identifies Absence Management eligible employees who have not reported any absences.
- **Reported Absences** – Report is run by employee or department for a specified period. Summary of reported absences by employee.

Navigation: *Global Payroll & Absence Management > CSU Absence Management > CSU – AM Inquiry > Multi Report*

Processing Steps	Screen Shot
<p><u>CREATE A RUN CONTROL</u></p> <ul style="list-style-type: none"> • <i>Apply this step for your first process only.</i> • Click on the "Add a New Value" tab • Run Control ID: Create a new Run Control. (i.e.: AM_Reports) • Click on the Add button. 	 <p>AM Reports</p> <p>Find an Existing Value Add a New Value</p> <p>Run Control ID: <input type="text"/></p> <p>Add</p>
<p>1. <u>SELECT A RUN CONTROL</u></p> <ul style="list-style-type: none"> • Use the Search button to bring up a listing of all of your Run Controls. <p>Select the Run Control for the AM Reports process.</p>	 <p>AM Reports</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>Limit the number of results to (up to 300): <input type="text" value="300"/></p> <p>Run Control ID: begins with <input type="text"/></p> <p>Search Clear Basic Search Save Search Criteria</p>

Manager Reports (continued)

Processing Steps	Screen Shot																				
<p>2. RUN REPORTS</p> <ul style="list-style-type: none"> The report Run Control is displayed. Absence Report Search: <ul style="list-style-type: none"> Complete the fields that will isolate the employees that you want to view (i.e.: Department) Empl ID: Completing this field will result in data for that particular employee. Empl Rcd#: Further filters out data to include only one record for an employee. CSU Unit: Filter by Reporting Unit Department: Filter by department code Period ID: Filter by pay period (This filter will be important once we have a lot of history in the system) Monthly Processing: <ul style="list-style-type: none"> Check the boxes of the reports that you would like to run. Multiple reports can be generated at the same time. Recommended: <ul style="list-style-type: none"> Absence Activity No Time Reported Reported Absences Click Save on the bottom of the page to save the run control parameters. Click the Submit button to start processing. 	 <p>CSU Absence Management - Multi Reports</p> <p>Report Control ID: AM_Something Report Manager Process Monitor Submit</p> <p>Absence Report Search</p> <p>Empl ID: <input type="text"/></p> <p>Empl Rcd#: <input type="text"/></p> <p>CSU Unit: <input type="text"/></p> <p>Department: <input type="text" value="110"/> Office of the President</p> <p>Period ID: <input type="text" value="2012-09"/></p> <p><input type="button" value="Clear"/></p> <p>* Click on hyperlink for online query reporting * Check box(es) to include in report run</p> <p>Monthly Processing</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Absence Activity Select All <input type="checkbox"/> Absence Adjustment Clear All <input type="checkbox"/> Absences Not Transferred to TL <input type="checkbox"/> Excess Plus/Minus - Negative <input type="checkbox"/> Excess Plus/Minus - Positive <input type="checkbox"/> Excessive Hours In Single Day <input checked="" type="checkbox"/> No Leave Taken <input type="checkbox"/> Reported Absence Not Processed <input checked="" type="checkbox"/> Reported Absences <input type="checkbox"/> Reported Absences Not Approved <p><input type="button" value="Save"/></p> <p>Audits</p> <ul style="list-style-type: none"> <input type="checkbox"/> Audit Comments Select All <input type="checkbox"/> Expiring ADO & Holiday Credit Clear All <input type="checkbox"/> Negative Balance <input type="checkbox"/> Pay Group Validation 																				
<ul style="list-style-type: none"> You should be taken directly into the Process List page. Wait a few seconds to let the process run, then click the Refresh button to update the run status. 	 <p>Process List Server List</p> <p>View Process Request For</p> <p>User ID: <input type="text"/> Type: <input type="text"/> Last: <input type="text"/> 3 Days Refresh</p> <p>Server: <input type="text"/> Name: <input type="text"/> Instance: <input type="text"/> to <input type="text"/></p> <p>Run Status: <input type="text"/> Distribution Status: <input type="text"/> <input checked="" type="checkbox"/> Save On Refresh</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq.</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>544858</td> <td></td> <td>SQR Report</td> <td>CSUAM001</td> <td>nathan.revard</td> <td>10/23/2012 10:51:33AM PDT</td> <td>Queued</td> <td>N/A</td> <td>Details</td> </tr> </tbody> </table>	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	<input type="checkbox"/>	544858		SQR Report	CSUAM001	nathan.revard	10/23/2012 10:51:33AM PDT	Queued	N/A	Details
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Manager Reports (continued)

Processing Steps	Screen Shot
<ul style="list-style-type: none"> The reports are finished processing when the Run Status changes to "Success" and the distribution status is "Posted". Click on the Details link to open the process detail page. 	
<ul style="list-style-type: none"> Click View Log/Trace under the Actions heading. 	
<ul style="list-style-type: none"> The File List will appear, presenting you with links to the reports: <ol style="list-style-type: none"> Absence Activity CSUAM001_ABS_ACTIVITY_#.csv No Time Reported CSUAM001_NO_LEAVE_TAKEN_#.csv Reported Absences CSUAM001_REPORTED_ABS_#.csv 	

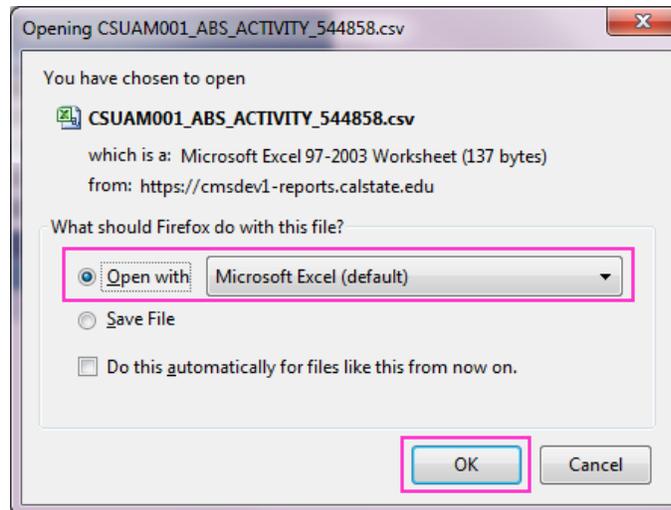
Manager Reports (continued)

3. OPEN/SAVE REPORTS

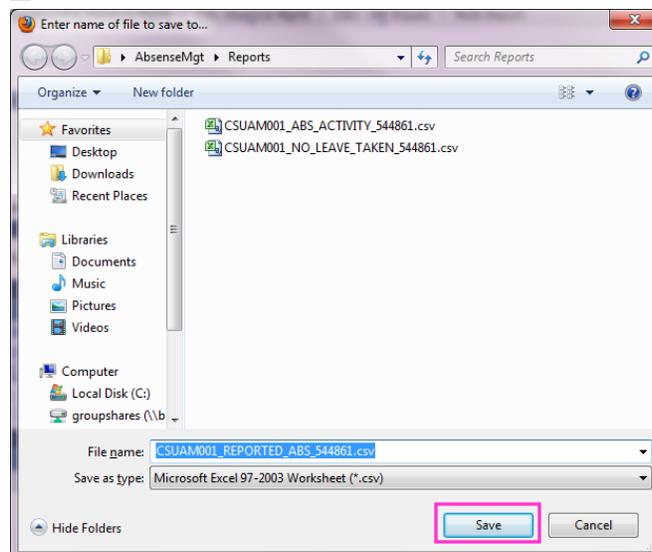
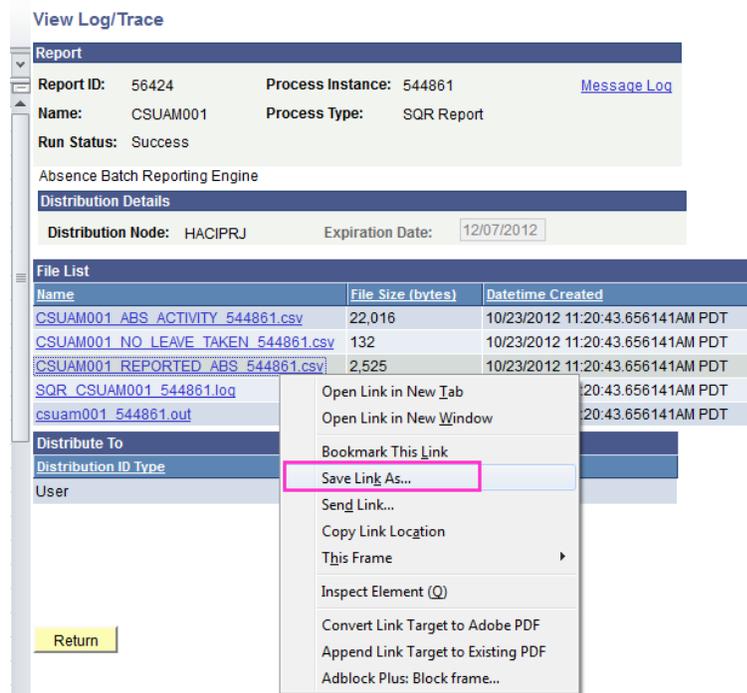
- Click the first report name "CSUAM001_ABS_ACTIVITY_#.csv"
- Select 'Open with Microsoft Excel' and click **OK**.

Note: this window may vary depending on the web browser and settings you are using.

You may also choose to **Save file** in a designated folder on your computer or shared drive to be accessed later.



- Alternatively, you may right-click each of the report links, select **Save Link As**, and choose the desired folder to save the reports to be opened later.



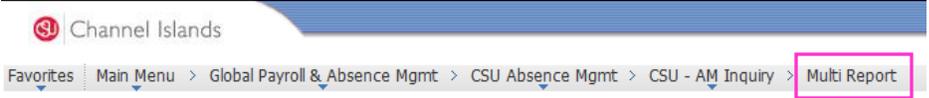
Manager Reports (continued)

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<p>4. REPORT FIELDS</p> <ul style="list-style-type: none"> Once you have the files saved/opened, you may notice all three of these reports contain these twelve common fields identifying the employee's job data: <ol style="list-style-type: none"> EmplID Rcd Name Empl Status Empl Class CSU Unit DeptID Dept. Name Job Code Job Title FTE AM Pay Group 	<p>The top screenshot shows a table with the following data:</p> <table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th>F</th> <th>G</th> </tr> <tr> <th>1</th> <th>EmplID</th> <th>Rcd</th> <th>Name</th> <th>Empl Status</th> <th>Empl Class</th> <th>CSU Unit</th> <th>DeptID</th> </tr> </thead> <tbody> <tr><td>2</td><td></td><td>0</td><td></td><td>Active</td><td>Regular</td><td>110</td><td>110</td></tr> <tr><td>3</td><td></td><td>0</td><td></td><td>Active</td><td>Regular</td><td>110</td><td>110</td></tr> <tr><td>4</td><td></td><td>2</td><td></td><td>Leave W/Py</td><td>Regular</td><td>110</td><td>110</td></tr> <tr><td>5</td><td></td><td>0</td><td></td><td>Active</td><td>Regular</td><td>110</td><td>110</td></tr> <tr><td>6</td><td></td><td>0</td><td></td><td>Active</td><td>Regular</td><td>110</td><td>110</td></tr> <tr><td>7</td><td></td><td>0</td><td></td><td>Active</td><td>Regular</td><td>110</td><td>110</td></tr> <tr><td>8</td><td></td><td>0</td><td></td><td>Active</td><td>Regular</td><td>110</td><td>110</td></tr> <tr><td>9</td><td></td><td>0</td><td></td><td>Active</td><td>Regular</td><td>110</td><td>110</td></tr> </tbody> </table> <p>The bottom screenshot shows a table with the following data:</p> <table border="1"> <thead> <tr> <th></th> <th>H</th> <th>I</th> <th>J</th> <th>K</th> <th>L</th> </tr> <tr> <th></th> <th>Dept. Name</th> <th>Job Code</th> <th>Job Title</th> <th>FTE</th> <th>AM Pay Group</th> </tr> </thead> <tbody> <tr><td></td><td>Office of the President</td><td>1035</td><td>ord 12 Mo</td><td>1</td><td>CSUEU SALN</td></tr> <tr><td></td><td>Office of the President</td><td>1038</td><td>clst 12 Mo</td><td>1</td><td>CSUEU SALN</td></tr> <tr><td></td><td>Office of the President</td><td>1038</td><td>clst 12 Mo</td><td>0.5</td><td>CSUEU SALN</td></tr> <tr><td></td><td>Office of the President</td><td>3306</td><td></td><td>1</td><td>M80 VAC</td></tr> <tr><td></td><td>Office of the President</td><td>1032</td><td>istant 12 Mo</td><td>0.75</td><td>CSUEU SALN</td></tr> <tr><td></td><td>Office of the President</td><td>1176</td><td>port 12 Mo</td><td>1</td><td>C99 SAL NX</td></tr> <tr><td></td><td>Office of the President</td><td>1148</td><td></td><td>1</td><td>C99 SAL X</td></tr> <tr><td></td><td>Office of the President</td><td>2977</td><td></td><td>1</td><td>M98</td></tr> </tbody> </table>		A	B	C	D	E	F	G	1	EmplID	Rcd	Name	Empl Status	Empl Class	CSU Unit	DeptID	2		0		Active	Regular	110	110	3		0		Active	Regular	110	110	4		2		Leave W/Py	Regular	110	110	5		0		Active	Regular	110	110	6		0		Active	Regular	110	110	7		0		Active	Regular	110	110	8		0		Active	Regular	110	110	9		0		Active	Regular	110	110		H	I	J	K	L		Dept. Name	Job Code	Job Title	FTE	AM Pay Group		Office of the President	1035	ord 12 Mo	1	CSUEU SALN		Office of the President	1038	clst 12 Mo	1	CSUEU SALN		Office of the President	1038	clst 12 Mo	0.5	CSUEU SALN		Office of the President	3306		1	M80 VAC		Office of the President	1032	istant 12 Mo	0.75	CSUEU SALN		Office of the President	1176	port 12 Mo	1	C99 SAL NX		Office of the President	1148		1	C99 SAL X		Office of the President	2977		1	M98
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<p>c) The Reported Absences report contains these specific fields:</p> <ul style="list-style-type: none"> M. Absence Type N. Begin Date O. End Date P. Duration Q. Approval Status R. Absence Status S. Partial Hours T. All Days U. End Day Hours V. Void W. Source 	<table border="1"> <thead> <tr> <th></th> <th>M</th> <th>N</th> <th>O</th> <th>P</th> <th>Q</th> <th>R</th> </tr> </thead> <tbody> <tr> <td>Group</td> <td>Absence Type</td> <td>Begin Date</td> <td>End Date</td> <td>Duration</td> <td>Approval Status</td> <td>Absence Status</td> </tr> <tr> <td>LN</td> <td>Sick - Self</td> <td>9/25/2012</td> <td>9/25/2012</td> <td>1 Y</td> <td></td> <td>Approved</td> </tr> <tr> <td>LN</td> <td>Vacation</td> <td>9/11/2012</td> <td>9/11/2012</td> <td>8 Y</td> <td></td> <td>Approved</td> </tr> <tr> <td>ALN</td> <td>No Leave Taken</td> <td>8/31/2012</td> <td>8/31/2012</td> <td>0 Y</td> <td></td> <td>Approved</td> </tr> <tr> <td>LN</td> <td>Vacation</td> <td>9/21/2012</td> <td>9/21/2012</td> <td>8 Y</td> <td></td> <td>Approved</td> </tr> <tr> <td>LN</td> <td>No Leave Taken</td> <td>8/31/2012</td> <td>9/30/2012</td> <td>0 Y</td> <td></td> <td>Approved</td> </tr> <tr> <td>X</td> <td>Vacation</td> <td>9/21/2012</td> <td>9/24/2012</td> <td>16 Y</td> <td></td> <td>Approved</td> </tr> <tr> <td></td> <td>Sick - Self</td> <td>9/4/2012</td> <td>9/5/2012</td> <td>16 Y</td> <td></td> <td>Approved</td> </tr> <tr> <td></td> <td>No Leave Taken</td> <td>8/31/2012</td> <td>8/31/2012</td> <td>0 Y</td> <td></td> <td>Approved</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>R</th> <th>S</th> <th>T</th> <th>U</th> <th>V</th> <th>W</th> </tr> </thead> <tbody> <tr> <td>Approved</td> <td>Partial Hours</td> <td>All Days</td> <td>End Day Hours</td> <td>Void</td> <td>Source</td> </tr> <tr> <td>Approved</td> <td></td> <td>1 Y</td> <td></td> <td>0 N</td> <td>Manager</td> </tr> <tr> <td>Approved</td> <td></td> <td>0 N</td> <td></td> <td>0 N</td> <td>Manager</td> </tr> <tr> <td>Approved</td> <td></td> <td>0 N</td> <td></td> <td>0 N</td> <td>Manager</td> </tr> <tr> <td>Approved</td> <td></td> <td>0 N</td> <td></td> <td>0 N</td> <td>Manager</td> </tr> <tr> <td>Approved</td> <td></td> <td>0 N</td> <td></td> <td>0 N</td> <td>Manager</td> </tr> <tr> <td>Approved</td> <td></td> <td>0 N</td> <td></td> <td>0 N</td> <td>Manager</td> </tr> <tr> <td>Approved</td> <td></td> <td>0 N</td> <td></td> <td>0 N</td> <td>Manager</td> </tr> <tr> <td>Approved</td> <td></td> <td>0 N</td> <td></td> <td>0 N</td> <td>Manager</td> </tr> <tr> <td>Approved</td> <td></td> <td>3 Y</td> <td></td> <td>0 N</td> <td>Manager</td> </tr> </tbody> </table>		M	N	O	P	Q	R	Group	Absence Type	Begin Date	End Date	Duration	Approval Status	Absence Status	LN	Sick - Self	9/25/2012	9/25/2012	1 Y		Approved	LN	Vacation	9/11/2012	9/11/2012	8 Y		Approved	ALN	No Leave Taken	8/31/2012	8/31/2012	0 Y		Approved	LN	Vacation	9/21/2012	9/21/2012	8 Y		Approved	LN	No Leave Taken	8/31/2012	9/30/2012	0 Y		Approved	X	Vacation	9/21/2012	9/24/2012	16 Y		Approved		Sick - Self	9/4/2012	9/5/2012	16 Y		Approved		No Leave Taken	8/31/2012	8/31/2012	0 Y		Approved	R	S	T	U	V	W	Approved	Partial Hours	All Days	End Day Hours	Void	Source	Approved		1 Y		0 N	Manager	Approved		0 N		0 N	Manager	Approved		0 N		0 N	Manager	Approved		0 N		0 N	Manager	Approved		0 N		0 N	Manager	Approved		0 N		0 N	Manager	Approved		0 N		0 N	Manager	Approved		0 N		0 N	Manager	Approved		3 Y		0 N	Manager
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<p>5. RE-RUNNING REPORTS</p> <ul style="list-style-type: none"> If you forgot to save an old report or wish to run a new batch of reports with different parameters (such as a different pay-period or another department), click the Multi-Report link in the top navigation bar to get back to run control page. 	 <p>Channel Islands Favorites Main Menu > Global Payroll & Absence Mgmt > CSU Absence Mgmt > CSU - AM Inquiry > Multi Report</p>																																																																						
<ul style="list-style-type: none"> Enter new search parameters and repeat the processing steps detailed in Section 2 above to run a new report, <i>OR...</i> To view reports that you have already run, click the Process Monitor link. 	<p>CSU Absence Management - Multi Reports</p> <p>Report Control ID: AM_Something Report Manager Process Monitor Submit</p> <p>Absence Report Search</p> <p>Empl ID: <input type="text"/> <input type="button" value="Q"/></p> <p>Empl Rcd#: <input type="text"/> <input type="button" value="Q"/></p> <p>CSU Unit: <input type="text"/> <input type="button" value="Q"/></p> <p>Department: <input type="text" value="110"/> <input type="button" value="Q"/> Office of the President</p> <p>Period ID: <input type="text" value="2012-09"/> <input type="button" value="Q"/></p> <p><input type="button" value="Clear"/></p> <p>* Click on hypertext for online query reporting * Check box(es) to include in report run</p> <p>▼ Monthly Processing ▼ Audits</p>																																																																						
<ul style="list-style-type: none"> Select the appropriate time range and click Refresh to pull up a list of report instances you have run in the past. As you did before, Click Details next to the instance you wish to review; then Click View Log/Trace under the Actions heading to pull up the file list. Open/save the reports using your preferred method. 	<p>Process List Server List</p> <p>View Process Request For</p> <p>User ID: <input type="text" value="nathan.revard"/> <input type="button" value="Q"/> Type: <input type="text"/> Last <input type="text"/> 20 <input type="button" value="Q"/> <input type="button" value="Refresh"/></p> <p>Server: <input type="text"/> Name: <input type="text"/> <input type="button" value="Q"/> Instance: <input type="text"/> to <input type="text"/></p> <p>Run Status: <input type="text"/> Distribution Status: <input type="text"/> <input checked="" type="checkbox"/> Save On Refresh</p> <p>Days All Days Hours Minutes Years</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq.</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>544862</td> <td></td> <td>SQR Report</td> <td>CSUAM001</td> <td>nathan.revard</td> <td>10/23/2012 11:39:38AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>544861</td> <td></td> <td>SQR Report</td> <td>CSUAM001</td> <td>nathan.revard</td> <td>10/23/2012 11:20:20AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>544860</td> <td></td> <td>SQR Report</td> <td>CSUAM001</td> <td>nathan.revard</td> <td>10/23/2012 11:18:48AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>544859</td> <td></td> <td>SQR Report</td> <td>CSUAM001</td> <td>nathan.revard</td> <td>10/23/2012 11:06:57AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>544858</td> <td></td> <td>SQR Report</td> <td>CSUAM001</td> <td>nathan.revard</td> <td>10/23/2012 10:51:33AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td>544824</td> <td></td> <td>SQR Report</td> <td>CSUAM001</td> <td>nathan.revard</td> <td>10/05/2012 11:34:35AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> </tr> </tbody> </table>	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	<input type="checkbox"/>	544862		SQR Report	CSUAM001	nathan.revard	10/23/2012 11:39:38AM PDT	Success	Posted	Details	<input type="checkbox"/>	544861		SQR Report	CSUAM001	nathan.revard	10/23/2012 11:20:20AM PDT	Success	Posted	Details	<input type="checkbox"/>	544860		SQR Report	CSUAM001	nathan.revard	10/23/2012 11:18:48AM PDT	Success	Posted	Details	<input type="checkbox"/>	544859		SQR Report	CSUAM001	nathan.revard	10/23/2012 11:06:57AM PDT	Success	Posted	Details	<input type="checkbox"/>	544858		SQR Report	CSUAM001	nathan.revard	10/23/2012 10:51:33AM PDT	Success	Posted	Details	<input type="checkbox"/>	544824		SQR Report	CSUAM001	nathan.revard	10/05/2012 11:34:35AM PDT	Success	Posted	Details
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