

13. Reports Processing

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13.1. Running and / or downloading reports

- 1 Log on to PeopleSoft Home page and navigate: **Home > ReportingTools > Query Manager > Use > Query Manager.**

Under the **Query Manager, Find an Existing Query** page, the dialog box below will appear.

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Query](#) | [Create New Query](#)

***Search By:** begins with

[Advanced Search](#)

[Find an Existing Query](#) | [Create New Query](#)

Figure 14-1 Query manager fields

- 2 Under **Search by**, choose **Name, Begins with**, and type **SFO**.

Note: If you know the first few letters of the report name, you may type them after **SFO**. This will reduce the list of reports to those you are interested in.

- 3 Click **Search**.

After clicking the search button, a list of reports will appear. The reports listed below are for faculty data; please disregard any other reports that may appear on the list.

Search Results

*Folder View: -- All Folders --

Check All Uncheck All *Action: -- Choose -- Go

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Schedule
<input type="checkbox"/>	SFO_BUDGET_LCD_DEPT_EXP_N_DTL	For LCD Expense Allocation	Public		Edit	HTML	Excel	Schedule
<input type="checkbox"/>	SFO_LCD_1110_JB_COMPRATE		Public		Edit	HTML	Excel	Schedule
<input type="checkbox"/>	SFO_LCD_CCA_FACROST		Public		Edit	HTML	Excel	Schedule
<input type="checkbox"/>	SFO_LCD_CCA_PAYROLL		Public		Edit	HTML	Excel	Schedule
<input type="checkbox"/>	SFO_LCD_COE	LIST OF STAFF	Public		Edit	HTML	Excel	Schedule
<input type="checkbox"/>	SFO_LCD_COE_EED_LECT	LIST OF Faculty	Public		Edit	HTML	Excel	Schedule
<input type="checkbox"/>	SFO_LCD_COE_FACULTY	LIST OF Faculty	Public		Edit	HTML	Excel	Schedule

Figure 14-2 Search results

- From the valid list of reports indicated above, click the **Run** link for the report you wish to run. A new window will open displaying the results or run control for the report.

Here, you may review the data on line or, you may download the file to Excel spread sheet by clicking **Download result in**.

If you select this option, the file output will convert to a web-based Excel sheet.

- Choose File > Save As.
- Type the file name and choose the file location.
- From the Save as type, choose Microsoft Excel Workbook (*.xls).
- Close the window and you may open the file in Excel and manipulate the data as needed.
- Results can be saved or opened as a spreadsheet or a text file by clicking on **Excel SpreadSheet CSV Text File (215kb)**.

13.2. Report Processing

Human Resources Management System (HRMS) and Division of Information Technology (DoIT) have developed decentralized faculty data reports to assist in the faculty appointment processes.

Previously, Colleges and other units that hire faculty were asked to provide a list of names of employees who should have access to these reports. Access is granted to the individuals identified for a particular college/department(s)/area.

13.2.1. How to run, view and download the various reports

Below, are individual report descriptions, details and run-control instructions, if any, and suggestions on how to best utilize the reports.

13.2.2. Security

All reports return faculty data that directly corresponds to the user's security. Specifically, if a user has faculty E-TRAC security for only one department, only the faculty data for that department will display in the reports. If the user has access to multiple departments, some reports will return data for all departments for which the user has access; other reports will allow the user to select a single department ID.

13.3. Report Types

13.3.1.1. SFO_FACULTY_DEMOGRAPHIC_DATA

Usage	Most useful by downloading into Excel for any demographic analysis on salary, age, gender, ethnicity, or rank by department. Use Excel's Pivot Table and chart functionality for demographic analysis, reports and department/college profiles.
Contents	Employee Class & Status, Department, Job Code & title, Appt End date, Time base, monthly salary, salary range (grade), full time comp rate, highest education, gender, ethnicity and age.
Run control	In the Department field, enter the 4-digit department, or enter % to view all faculty in all departments for which security is granted. Click View Results .

13.3.1.2. SFO_FACULTY_GLOBAL_REPORT

Usage	If downloaded into Excel, this data can be used as a mail-merge source for mailing labels or form letters, by department or home address. Also can be used to audit home address and e-mail data, etc.
Contents	University Identification Number (UIN), Employee first & last name, employee Class & Status, Department ID & title, position number, Job Code & title, Appt End date, Time base, full time comp rate, monthly salary, salary range (grade), first campus hire date, home address, e-mail, and highest education.
Run control	In the Department field, enter the 4-digit department, or enter % to view all faculty in all departments for which security is granted. Click View Results .

13.3.1.3. SFO_FACULTY_LEAVE_AUDIT_REPORT

Usage	Departments are responsible for returning faculty from any type of leave. Use this report to determine which faculty need to be returned from leave for a given semester. Carefully review the leave effective dates, end dates and leave types, and process the appropriate E-TRAC (see Chapter 8, "Returning Faculty from Leave" in the E-TRAC for faculty processing manual.)
Contents	University Identification Number (ID), Employee first & last name, Department ID & title, employee Status, Leave type, Leave effective date, return date, Time base (FTE). Note the time base reflects the employee's active time base; not the percentage of leave.
Run control	None. Lists all faculty in leave status for all departments for which security is granted.

13.3.1.4. SFO_FACULTY_LWP_ELIG_RPT

Usage	<p>Used to determine Faculty Leave with Pay Eligibility. Each eligibility date is formatted as month and year (MM/YYYY). For each faculty member listed, in the corresponding column and row, the DIP Eligibility Date reflects the first date that the faculty member became eligible or reflects a projected eligibility date for Difference in Pay; the SAB Eligibility Date reflects the first date that the faculty member became eligible or reflects a projected eligibility date for Sabbatical. For example, if a date indicates, "9/2005", the faculty is eligible for leave with pay during the 2005-2006 academic year.</p> <p>NOTE: The dates indicated are not adjusted for faculty who are currently on a leave with pay. In addition, the dates indicated would not be correct if a faculty member was on leave with pay the prior semester and had not been returned from LWP.</p>
Contents	University Identification Number (UIN), Employee first & last name, Department ID & title, Job Code (classification), DIP Eligibility Date, SAB Eligibility Date.
Run control	None. Lists all faculty with LWP eligibility for all departments for which security is granted.

13.3.1.5. SFO_FACULTY_ROSTER

Usage	This report replaces the "Staffing List" historically generated and distributed by Human Resources or Faculty Affairs. It should serve as a key tool in monitoring the faculty transaction process during the faculty-processing window for a given semester, and used to view rosters from prior semesters (prior data available from fall 2003 and later).
Contents	University Identification Number (UIN), Employee first & last name, Department ID & title, Job Code (classification), salary range (grade), monthly salary, position number, first campus hire date, effective date of last transaction, Appt End date, employee Class, Time base (FTE), and employee status.
Run control	<p>In the Term field, enter FALL, SPR (Spring) or SUM (Summer).</p> <p>In the CSU Year field, enter the 4-digit year (YYYY).</p> <p>In the SetID field, enter sfcmp.</p> <p>In the Department field, enter the 4-digit department, or enter % to view all faculty in all departments for which security is granted.</p> <p>Click View Results.</p>

13.3.1.6. SFO_FERP_AUDIT_REPORT

Usage	Departments are responsible for appointing FERP faculty into their teaching semester(s). Use this report to determine which FERP faculty need to be appointed for a given semester. Carefully review the Status, end dates and FERP Teaching Sem/TB fields, and process the appropriate E-TRAC appointment for FERP. (See Chapter 9, "Retirement and FERP Processing" in the E-TRAC for faculty processing manual.)
Contents	University Identification Number (UIN), Employee first & last name, Department ID & title, job code (classification), position number, employee Status, time base (FTE), grade (range), comp rate, appt end date, FERP eligibility end date, and FERP teaching semester and time base.
Run control	Treat this as an "as of" date. Enter the date, MMDDYYYY; click View Results . Lists all faculty in FERP status for all departments for which security is granted. There are four Non-teaching Workload audit reports available in the Query Manager. They are described below. Please note that the report indicated in parenthesis and beginning with SFO_APDB will produce the same results as the SFO_FACULTY report with a similar name. The only difference is the parameter used for the SFO_APDB reports is the department code from SIMS and the parameter for the SFO_FACULTY reports is the dept id from Peoplesoft.

13.3.1.7. SFO_FACULTY_ASSIGN_TIME (SFO_APDB_ASSIGN_TIME)

Usage	Use this report to audit assigned time workload for your college. Historical data is also available.
Contents	Term, year, department ID with corresponding SIMS college and department code, employee first and last name, job code and title, non-teaching FTE, assigned time (AT) code, AT code description, source, WTUS, SS#, UIN and duration.
Run control	In the dept ID field enter the 4 digit department or enter % to view all faculty in all departments for which security is granted; click "View Results."

13.3.1.8. SFO_FACULTY_ADMIN_TIME_IAF (SFO_APDB_IAF)

Usage	Effective Fall 2004, colleges are responsible for entering administrative workload for all deans, associate deans and department chairs. Use this report to audit administrative workload for your college. Historical data is also available.
Contents	Term, year, department ID with corresponding SIMS college and department code, employee first and last name, job code and title, non-teaching FTE, non-teaching reason code (SIMS administrative level code)

	and description, SS#, UIN and duration.
Run control	In the dept ID field enter the 4 digit department or enter % to view all faculty in all departments for which security is granted; click View Results .

13.3.1.9. SFO_FACULTY_ADMIN_TIME_OSF (SFO_APDB_OSF)

Usage	Use this report to audit workload reported as Other Support Fraction (OSF) in SIMS and the Academic Planning Database (APDB). OSF is often referred to as "Other State Funds." These funds are provided by the CSU for a special purpose generally referred to as a "system wide provision." These funds provide for the following four activities: (1) Librarian, (2) Faculty Affirmative Action, (3) Research, Scholarship and Creative Activity, and (4) Statewide Academic Senate.
Contents	Term, year, department ID with corresponding SIMS college and department code, employee first and last name, job code and title, non-teaching FTE, non-teaching reason code and description, SS#, UIN and duration.
Run control	In the dept ID field enter the 4 digit department or enter % to view all faculty in all departments for which security is granted; click "View Results."

13.3.1.10.SFO_APDB_ASSIGN_TM_AFTER_CUTOFF

Usage	Use this report to audit assigned time workload that was entered after the APDB cutoff date. Historical data is also available.
Contents	Term, year, department ID, college and department code, employee first and last name, job code and title, non-teaching FTE, assigned time (AT) code, AT code description, source, WTUS, SS#, UIN, duration, action date and user.
Run control	Enter the year, term and cutoff date.

13.3.1.11.SFO_FACULTY_ROSTER_SUMMER

Usage	Serves as a key tool in monitoring the faculty transaction process during the faculty-processing window for Summer state-supported YRO faculty appointments.
Contents	University Identification Number (UIN), Employee first & last name, Department ID & title, Job Code (classification), salary range (grade), AY full time monthly salary base, FTE (time base equivalent for summer appointments ¹), units assigned, salary rate per unit ² , total salary for session/appointment, position number, effective date of session/appointment, session/Appt End date,

	employee Class, and employee status.
Run control	<ol style="list-style-type: none"> 1 In the "Term:" field, enter SUM (Summer) 2 In the "CSU Year: field, enter the 4-digit year (YYYY) 3 In the "SetID field, enter SFCMP 4 In the "Department:" field, enter the 4-digit department, or enter % to view all faculty in all departments for which security is granted. 5 Click "View Results"

13.3.1.12. SFO_FAC_RET_TEN_ELIG

Usage	Serves as a key tool in tracking when probationary faculty are up for retention and/or tenure by indicating which probationary year they are in with respect to an "as of" date indicated by the user. This report should be executed on or about September 1 of each year, after all new tenure-track hires and tenure awards have been processed.
Contents	University Identification Number (UIN), employee first and last name, department title and ID, probationary year (1 = first, 2 = second, etc.), report "as of" date, probationary (end) date, employee status, rank/grade, Job Code, and original hire date on campus.
Run control	<ol style="list-style-type: none"> 1 In the As of Date box, type the date as of when you wish to see the probationary status of tenure-track faculty. Typically, this will be 0901 of a given year, for example 090105 will mean September 1, 2005. 2 In the Department box type the four digit department number, or type % to view all faculty in all departments for which security is granted. 3 Click View Results.

13.3.1.13. SFO_FAC_PROM_RVW

Usage	Serves as a key tool in tracking the anticipated promotion review eligibility/completion date for faculty at the Assistant, Associate or comparable ranks for Librarians andd SSP-ARs based on the duration in rank since the last promotion or date of tenured/tenure-track hire relative to a year indicated by the user. This report should be executed about mid September of each year, after all new tenure-track hires and promotions are processed.
Contents	University Identification Number (UIN), Employee first and last name, Employee status, Department ID and Title, Probationary Status (tenured, probationary), Job Code, Rank (e.g assistant, associate, etc.), Position Number, Last Promotion Review or tenure-track hire date and Projected

	(promotion) Review Date.
Run control	<ol style="list-style-type: none"> 1 In the Set ID box type SFCMP. 2 In the Department box, type the four digit department number, or type % to view all faculty in all departments for which security is granted. 3 In the CSU Year box type the year (YYYY) of the fall semester. For example, by entering 2005, the report will display faculty whose anticipated promotion review eligibility/completion date is 5/31/2006 or earlier for the 2005-2006 academic year promotion review cycle. 4 Click View Results.

13.3.1.14.SFO_FAC_POST_TEN_RVW

Usage	Serves as a key tool in tracking the anticipated or past tenure review date for tenured faculty based on the last recorded post tenure review or promotion, if applicable. This report should be executed about early September of each year, after all tenure and promotion transactions are processed and completed post tenure reviews are recorded.
Contents	University Identification Number (UIN), Employee first and last name, employee status, Department ID and title, Probationary Status (tenured), Job Code, Rank (Assistant, Associate), Position Number, Last post tenure or Promotion Review date, and Projected (post tenure) Review Date. Please note that this date may be a date in the past that indicates the first anticipated date for post tenure review completion.
Run control	<ol style="list-style-type: none"> 1 In the SetID box, type sfcmp. 2 In the Department box, type the 4-digit department number, or type % to view all faculty in all departments for which security is granted. 3 In the CSU Year box, type the year (YYYY) of the fall semester. For example, by typing 2005, the report will display faculty whose anticipated post tenure review completion date is 5/31/2006 or earlier for the 2005-2006 academic year post tenure review cycle. 4 Click View Results.