Report Name: HR Executive Dashboard: Annual Forecast - Institutional Base Salary

Headcount and annual forecast of Institutional Base Salary by Workforce Category and HR Department Hierarchy. This visualization also provides side by side comparisons by HR Department Hierarchy unit.

Audience: University of Minnesota Unit Leadership and HR Leads
Security/Access: HR Executive Dashboard Requested Access

Report Purpose

The purpose of the Annual Forecast - Institutional Base Salary dashboard is to provide a rough forecast of Institutional Base Salary expenditures at multiple levels in the HR Department Hierarchy. The dashboard also provides opportunities to gain an understanding of where units are dedicating budget for specific functions by using the workforce categories.

Business Rules

- Report is based on data in the PeopleSoft system on the last day of the month
- Institutional Base Salary is defined as the sum of the Total Base Salary, Total Administrative Augmentation, Total Increment and Total Regents' Professorship Pay amounts
- Data includes only active employees in company UMN
- Data includes Civil Service, Faculty, Graduate Assistants, Labor Represented, P&A, Professionals-in-Training (excludes temporary/casual and undergraduate student workers)
- ZDeptID Z0387 (HR Benefits Special Circumstances) excluded
- Includes paygroup P12, P10, P09; excludes PLH (less than 9 month) and ZNP (UMN Not Paid)

Calculations

- **Institutional Base Salary Amount**
  - Calculated summing the Institutional Base Salary amount of all jobs assigned to the unit in the HR Department Hierarchy
  - This calculation is made on the week of the second Monday of the month
- **Pay Component Count**
  - The number of instances the pay component is applied for all jobs in the sum total
- **Percent of Total Institutional Base Salary Amount**
  - Calculated by dividing the amount assigned to the individual pay component by the total Institutional Base Salary

Prompts

- **Date**
  - Mandatory field, the default will be set to the most recent month available
  - Only one month can be selected causing the report to include data from the selected month

- **Campus**
  - Selection determines the data included in the graphs and the values available in other prompts
  - Zero to multiple Campus values can be selected causing the report to include data from the selected units
  - Default will be set to All
- **VP (HR)**
  - Selection determines the data included in the graphs and the values available in other prompts
  - Zero to multiple VP (HR) values can be selected causing the report to include data from the selected units

- o Default will be set to All
- **College/Admin Unit**
  - o Selection determines the data included in the graphs and the values available in other prompts
  - o Zero to multiple College/Admin Unit values can be selected causing the report to include data from the selected units
  - o Default will be set to All
- **ZDeptID**
  - o Selection determines the data included in the graphs and the values available in other prompts
  - o Zero to multiple ZDeptID values can be selected causing the report to include data from the selected units
  - o Default will be set to All
- **Workforce Category**
  - o Selection determines the data included in the graphs and the values available in other prompts
  - o Zero to multiple Workforce Category values can be selected causing the report to include data from the selected Workforce Categories
  - o Default will be set to All
- **Pay Component**
  - o Selection determines the data included in the graphs and the values available in other prompts
  - o Zero to multiple Pay Component values can be selected causing the report to include data from the selected Pay Components
  - o Default will be set to All
- **Select a View** (Annual Forecast - Institutional Base Salary bar graph only)
  - o Selection determines the level on the HR Department Hierarchy the graph will display data at - graph will display unit data side by side for each unit at the selected level
  - o Only one level can be selected
  - o Field default will be set to Systemwide

Default Sort Order
- Workforce categories in alphabetical order
- If HR Department Hierarchy value is added to the Select a View prompt, units are displayed in alphabetical order

Data Refresh
The data for this report comes directly from PeopleSoft and is created on the week of the second Monday of the month.