

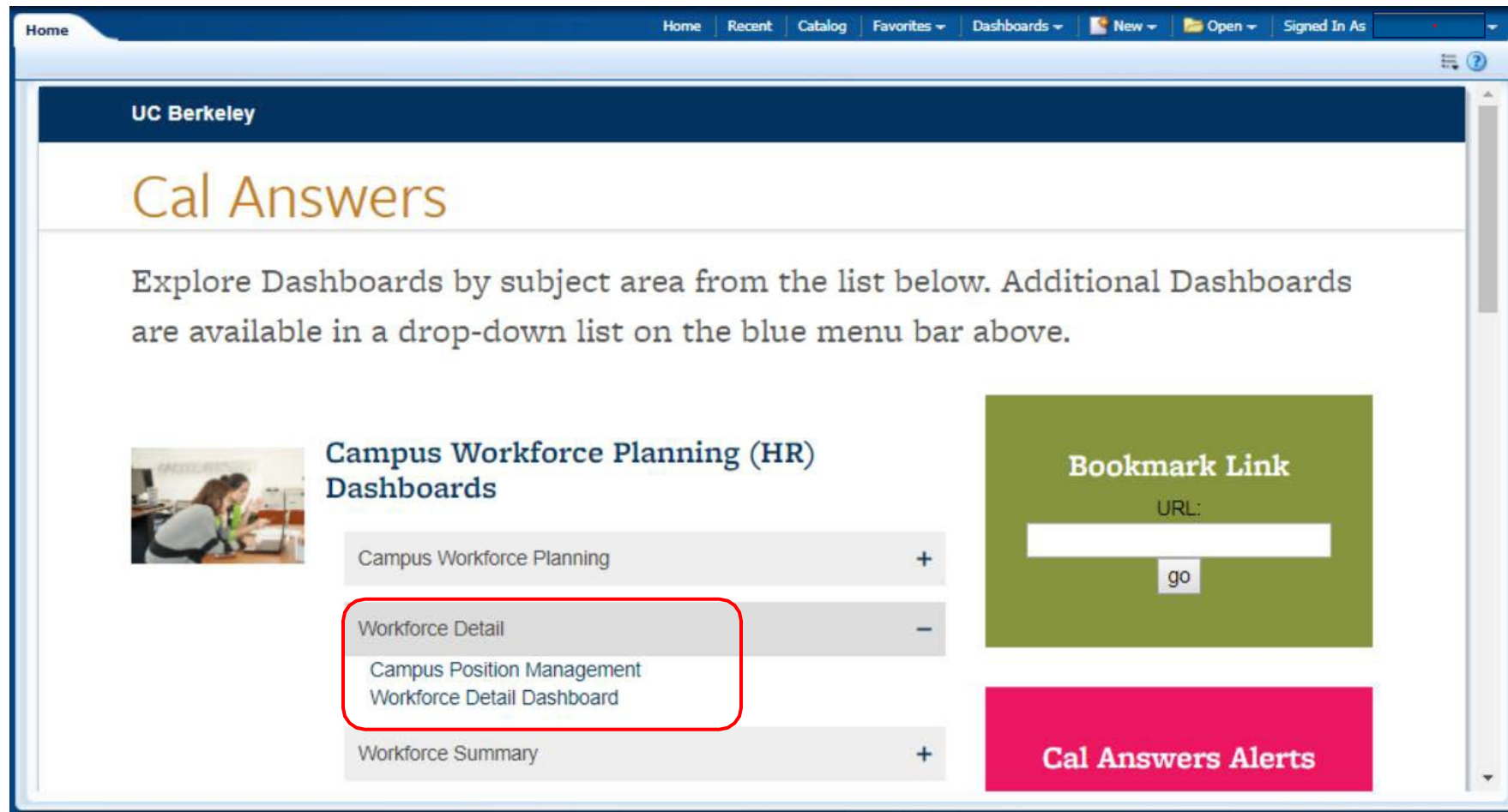
The Cal Answers Workforce Detail Dashboards enable you to access detailed information about the Positions and Employees appointed into Jobs in your organization. The table below provides descriptions and recommendations on how to get started using the Cal Answers Workforce Detail Dashboards. Visit the [Workforce Detail Wiki](#) for more information.

For all the reports in Workforce Detail, you must remove the “-“ from the Parent Org Node filter and select an Org or leave this filter blank and input another filter option.

Dashboard	Report Tab	Description
Campus Position Management	Position Funding	This tab displays the positions in HCM and their funding distributions based on the selected filters.
	Position Exception	This tab displays only positions that have an exception in HCM. The exception reasons are: Appointment End Date Passed, DeptID Mismatch between Job Data and Position Data, FTE Mismatch, Job Cd Mismatch, Location Mismatch, Over Allocated and Position Override.
	Position Roster	This tab is a roster of all positions and their incumbents in HCM, based on the selected filters. It has information on both the position(s) and the employee(s) in each position.
Legacy Workforce Detail Dashboard	<ul style="list-style-type: none"> • Job Data • Job Data by Date Range 	<p>This tab displays job-level information about Employees, Contingent Workers, and Persons of Interest.</p> <p>Use Job Data to view information as of the date in the As of Date filter. Displays the most recent effective row (equal to or less than the date indicated) for each record in HCM.</p> <p>Use the By Date Range version to target a specific range of different dates. Enter a range based on effective dates of the rows, the date on which the rows were entered, or the appointment end date associated with the rows. Also select if you want current only, salary change only or all records.</p>
	<ul style="list-style-type: none"> • Job Earnings Distribution • Job Earnings Distribution by Date Range 	<p>This tab displays job-level and distribution-level information about Employees, Contingent Workers, and Persons of Interest.</p> <p>Use Job Data to view information as of the date in the “As of Date” filter. It pulls the most recent effective row (equal to or less than the date indicated) for each record in HCM.</p> <p>Use the By Date Range version to target a specific range of different dates. Enter a range based on effective dates of the rows, the date on which the rows were entered, or the appointment end date associated with the rows. Also select if you want current only, salary change only or all records.</p>
	<ul style="list-style-type: none"> • Termination and Org Change 	<p>This report displays the Employees who had a change from one Org Node to another, or were terminated from University employment. You must select a range of Effective Dates to run this report. The report includes current information as well as the information about their prior appointment.</p>

Accessing the Cal Answers Workforce Detail Reporting Dashboards

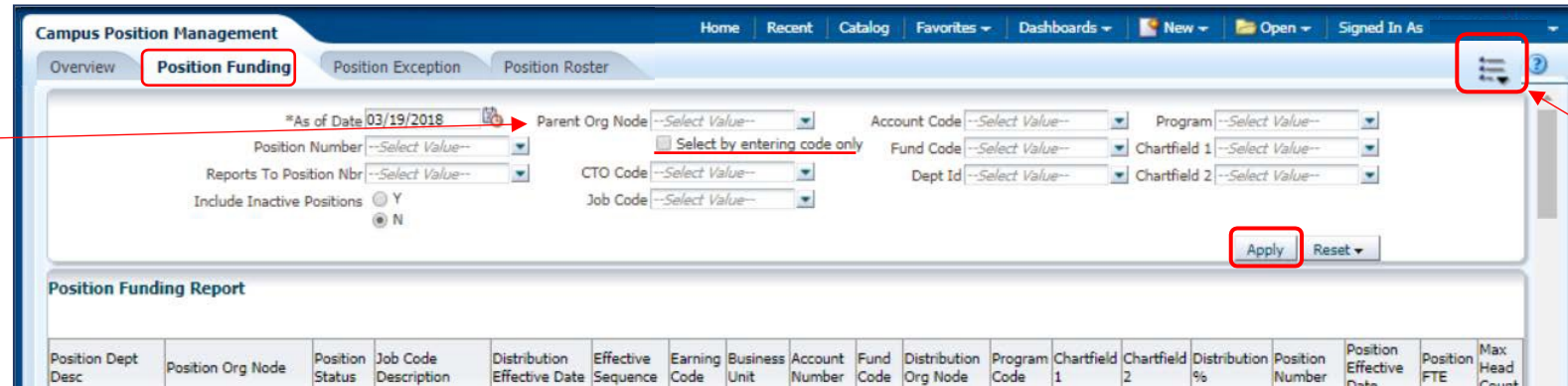
1. Go to calanswers.berkeley.edu to log into the Cal Answers tool. Chrome or Firefox are the recommended browsers.
2. Click on the [Log in to Cal Answers](#) link on the Cal Answers home page and when prompted enter your CalNet ID and passphrase. This will take you to the Home page of the Cal Answers application.
3. From the Campus Workforce (HR) Planning Dashboards section, expand the Workforce Detail box and click the blue link to navigate to one of the Workforce Detail dashboards:



Campus Position Management Dashboard Reports

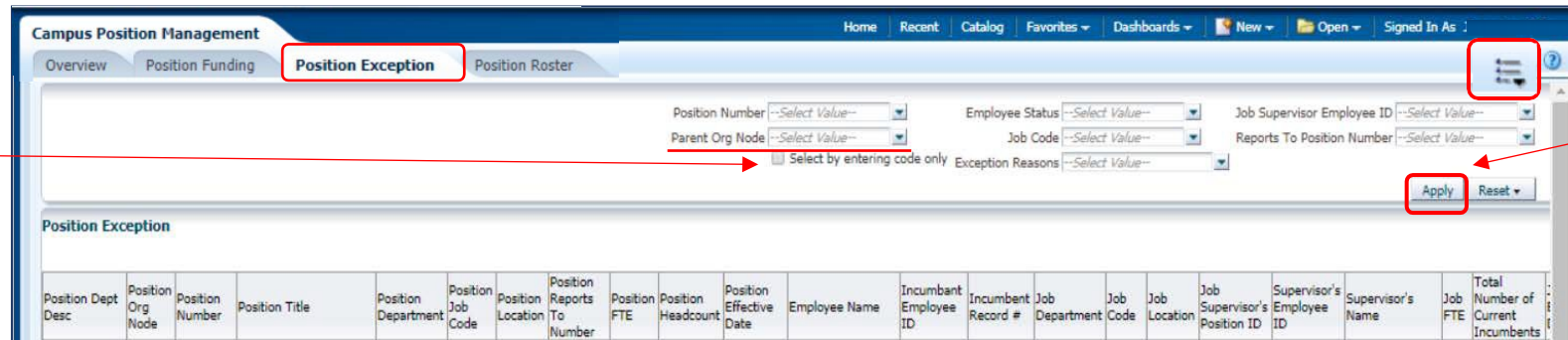
The Campus Position Management Dashboard contains three tabs Position Funding, Position Exception and Position Roster that offer reporting into data from HCM's Position Management tool.

Select a value from the **Parent Org Node** filter or highlight the dash and hit delete. **You must remove the dash to return results.**



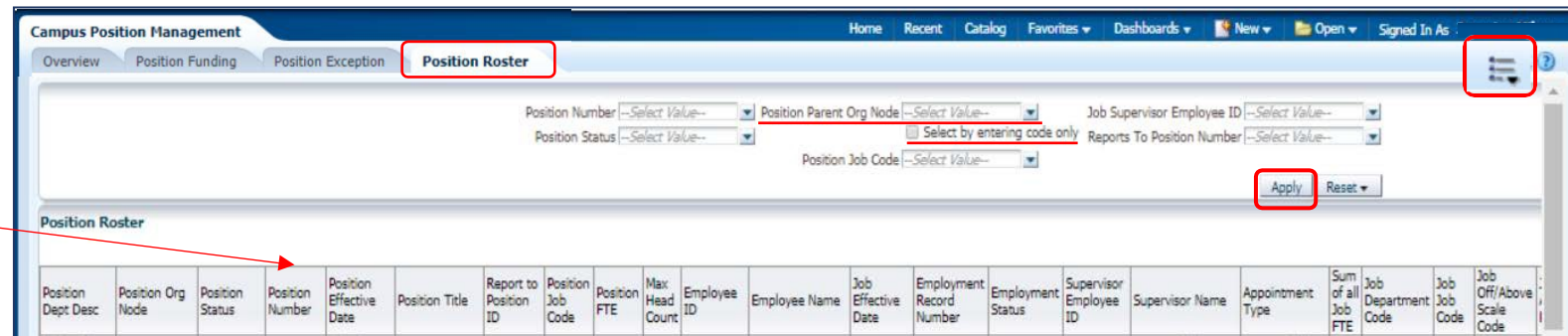
After filtering your results and including or excluding columns to create your desired report, choose [Save Current Customization](#) using the **Page Options** menu and **Set as Default** if desired.

Check the **Select by entering code only** box to type the Org directly into the filter. Separate multiples with a semicolon.



Click the **Apply** button to update the data table with the filter options.

Right-click a column header and select Include column to display a list of includable fields to customize report. View complete lists of available includable fields in Wiki.



Legacy Workforce Detail Dashboard Reports

The Workforce Detail Dashboard contains five report tabs- Job Data, Job Data by Date Range, Job Earnings Distribution, Job Earnings Distribution by Date Range, and Termination and Org Change that provide job, employee and distribution-level data from the campus human resources system: Human Capital Management (HCM).

Select a value from the **Parent Org Node** filter or highlight the dash and hit delete. **You must remove the dash to return results.**

Parent Org Node

After filtering your results and including or excluding columns to create your desired report, choose [Save Current Customization](#) using the **Page Options** menu and **Set as Default** if desired.

Right-click a column header and select Include column to display a list of includable fields to customize report. View complete lists of available includable fields in Wiki.

Check the **Select by entering code only** box to type the Org directly into the filter. Separate multiples with a semicolon.

Click the **Apply** button to update the data table with the filter options.

Total Row Count indicates the number of rows in data table results. If more than 25 rows use the blue down arrow to page down and up/down arrow to display all available rows.

Click the Export link to send the data to Excel. Select Excel format to download only visible columns. Select Data->CSV format to download displayed and includable

Org Node	Employee Name	Employee ID	Record #	Employee Status	Action Date	Effective Date	Job Title	Appt Start Date	Appt End Date	Supervisor	Hire Date	Fixed or Variable	Job FTE	Salary Grade	Salary Step	Annualized Rate	Unit Code	Time Code	FLSA Status	Pay Schedule	Leave Code	Salary Admin Plan	Business Title
ACBUD			0	A	7/28/2017	7/15/2016	ular/Career	9/1/2014	12/31/9999			F	1.00	26			99	E	E	MO	D	MSP	
ACBUD			0	A	2/5/2018	2/1/2018	ular/Career	2/1/2018	12/31/9999			F	1.00	23	0		99	E	E	MO	A	PSS	
ACBUD			0	A	9/29/2017	7/1/2017	ular/Career	10/12/2015	12/31/9999			F	1.00	26	0		99	E	E	MO	D	MSP	
ACBUD			0	A	2/7/2018	2/12/2018	ular/Career	3/1/2016	12/31/9999			F	1.00	23	0		99	E	E	MO	A	PSS	
ACBUD			0	A	2/7/2018	2/1/2018	ular/Career	9/12/2016	12/31/9999			F	1.00	23	0		99	E	E	MO	A	PSS	
ACBUD			0	A	2/27/2018	3/1/2018	Contract	12/4/2017	7/3/2018			F	1.00	23	0		99	E	E	MO	A	PSS	
ACBUD			0	A	9/29/2017	7/1/2017	ular/Career	11/1/2013	12/31/9999			F	1.00	25	0		99	E	E	MO	D	MSP	
ACBUD			0	A	7/24/2017	7/1/2017	ular/Career	7/7/2014	12/31/9999			F	1.00	25	0		99	E	E	MO	B	MSP	
ACBUD			0	A	9/29/2017	7/1/2017	ular/Career	7/1/2015	12/31/9999			F	1.00	25	0		99	E	E	MO	D	MSP	

Termination and Org Change Report

The Termination and Org Change report displays lists of employees who were terminated from University employment or had an appointment change from one Org Node to another. The available prompts allow you to filter by the current or Prior Parent Org Node, job code, and/or appointment type. You must select a range of Effective Dates to run this report. The report includes current information as well as the information about their prior appointment.

Effective Date Between defaults to one month prior and current date.

Please remove or replace the "-" in the Parent Org Node prompt and then click Apply.

Click the **Apply** button to update the data table with the filter options.

Employee ID	Record #	Employee First Name	Employee Last Name	Org Node	Prior Org Node	Employee Status	Prior Employee Status	Action Code	Action Reason Description	Prior Action Code	Appt Type	Prior Appt Type	Job Code	Job Description	Prior Job Code	Prior Job Description	Supervisor	Prior Supervisor
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Filter to limit records with only changes to

- Org Node
- Employee Status change to Death (D) or Terminated (T)
- Or both

Remove the dash "-" from the Parent Org Node field or add an org node in order to return results.