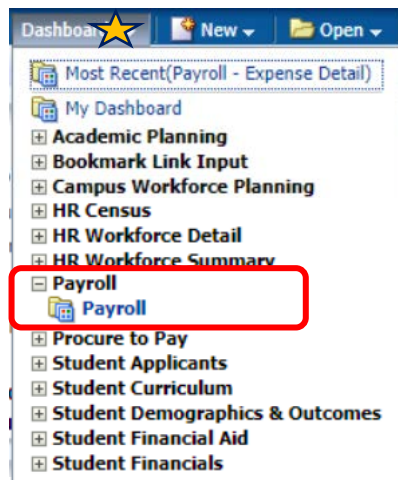


Payroll Dashboard

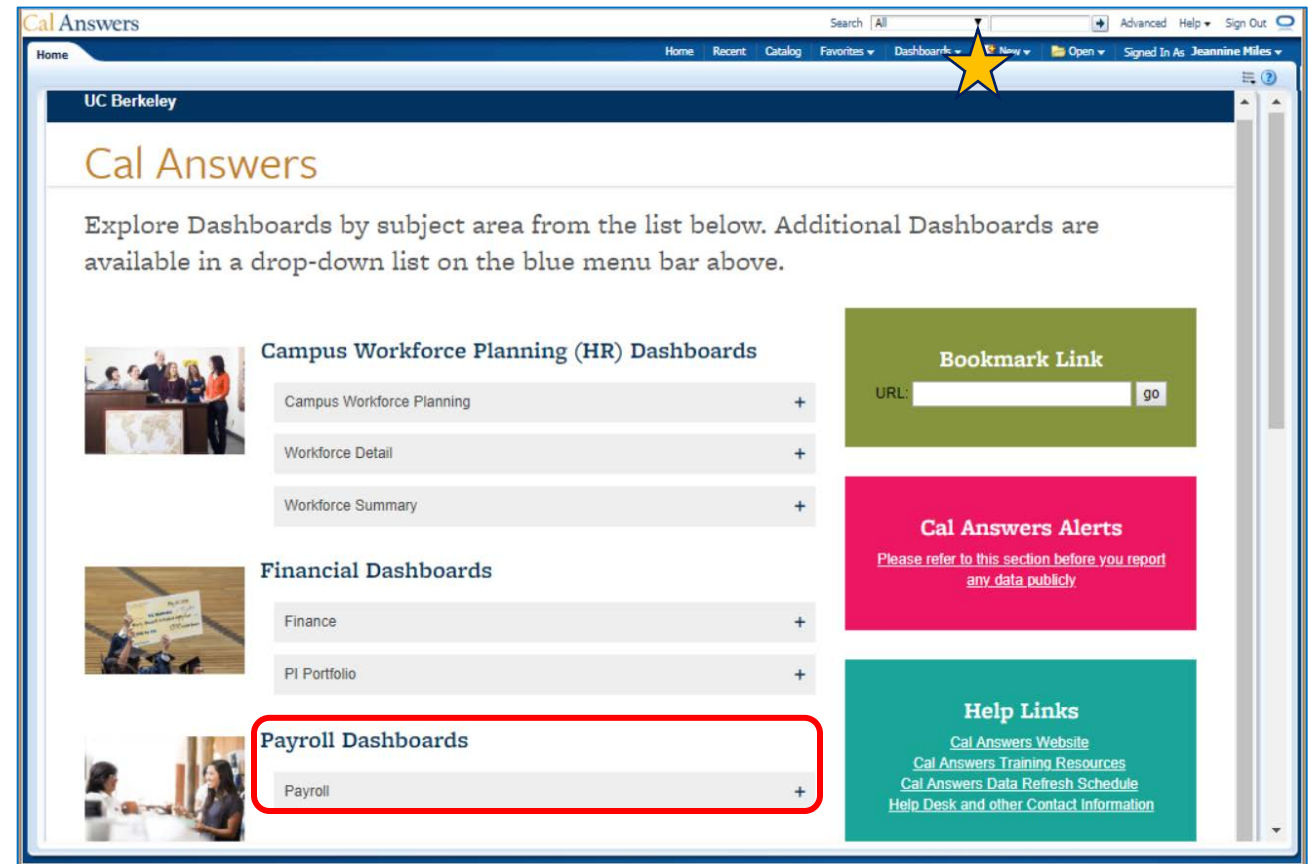
The **Cal Answers Payroll** dashboard displays information from the Payroll Personnel System (PPS), UC Berkeley's payroll source system. It replaces the existing BAIRS reports and enables HR professionals to access information they need to submit a Payroll Expense Transfer, view benefits by employee, and access leave accrual information. Reports display the data in accounting (credit/debit) signage. Once applied, dashboard filters persist between the two report tabs. Access the [Payroll wiki](#) for detailed report documentation as well as a [data dictionary](#) with definitions for the fields featured in these reports. Access to the Payroll dashboard has been automatically granted to those who currently have access to this information in BAIRS. Due to the sensitive nature of this data, access mirrors the org nodes and departments you specifically have access to in BAIRS. You may [request access](#) through SARA.

Accessing the Cal Answers Payroll Dashboard

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 **Payroll Dashboards** section, expand the **Payroll** box by clicking on the + sign and then click the blue **Payroll** link to display the dashboard.



Note: the Payroll Dashboard is also available from the Cal Answers Dashboards dropdown blue toolbar.



1. Overview Tab

The **Overview tab** defines each of the report tabs in the Payroll dashboard and provides hyperlinks to access each report. From the [Payroll Wiki](#) you can find a comprehensive review of the reports along with a dictionary of terms found in the reports. Check out the [Cal Answers Basic Navigation Learning Map](#) for links to Cal Answers navigation resources. If you still have questions follow the link to the [Cal Answers Help Desk email](#) for additional support.

Cal Answers

Search All [v] [go] Advanced Database Help Sign Out

Payroll Home Catalog Favorites Dashboards New Open Signed In As [user]

Overview Expense Detail Leave Accruals

Payroll Dashboard

The Payroll Dashboard is available to approved Cal Answers Payroll users and displays all the Payroll Expense Detail information from the PPS payroll source system. This dashboard also includes information about Employee Leave Accruals. Access the [Payroll wiki](#) for information about these reports as well as a [data dictionary](#) with definitions for the fields featured in these reports.

The reporting tabs in this dashboard include:

- [Payroll Expense Detail](#)
The report features three views for different purposes. The Standard View mimics the PPP5302 report from Page Center in PPS, which is the source system for the data in these reports. The Transaction View contains all the columns in the order needed to submit a Payroll Expense Transfer (PET). The Benefits Expanded View provides amounts for each individual benefit, which are summed into groupings in the other views. All three views contain detailed chartstring and Employee information for payroll expenses.
- [Leave Accruals](#)
This tab provides information about all the types of leave an Employee may accrue. It is provided in a monthly pivot table format, showing for each month: the beginning balance, accrual amount, usage and balance for each type of leave. The leave types are Vacation, Sick, Comp and Paid Time Off. For Vacation Leave, if any Employee is at or within three months of exceeding the balance of allowable accrued hours, there will be an indicator in that month. Any vacation hours lost are also provided. For Comp Accrual, if the Employee goes over a balance of 240, an indicator will appear for that month. Use this report to track employee leave balances and alert your staff if they are approaching an accrual maximum.

For questions or suggestions please email calanswers-help@berkeley.edu

Report tab name hyperlinks and definition.

2. Expense Detail Report

The **Expense Detail Report** displays Payroll Expense Detail information for the prompted values from the **PPS payroll source system** to approved Cal Answers Financials Payroll reporting users. There are three available views that all include detailed chartstring and Employee information for payroll expenses. The benefits amounts are the costs for each employee and are consistent with PPS data at the PageCenter report portal.

Comparable BAIRS Reports

| /Financial Reports/080. Payroll | |
|---------------------------------|--|
| Name | |
| BIS_PPS_Appointment.bqy | |
| BIS_PPS_Distribution_Curr.bqy | |
| BIS_PPS_Expense_Detail_Curr.bqy | |
| BIS_PPS_Expense_Detail_Hst.bqy | |

Between filter option allows you to pull data for a range of Dept IDs and Account and Fund Codes.

Ledger Start and End Month defaults to most recent closed month.

Please remove or replace the '-' in the Dept ID prompt and then click Apply.
Any query that runs for more than 10 minutes will be cancelled. If this occurs, please narrow your search and click Apply again.

- 3 Select View Options:
- **Standard (PPP5302)** mirrors the BAIRS Payroll PPP5302 report
 - **Transaction View (PET)** displays all required Payroll Expense Transfer information in the order needed
 - **Benefits Expanded** uncouples all individual benefit elements

Select the desired dashboard prompts and then click the **Apply** button to update the data table.

Like your filtered and/or edited table report view?

Create a [Saved Customization](#) to apply again and again.

a. Standard (PPP5302) view default Column Labels

Payroll Expense Detail

Select View Standard (PPP5302)

| Et Month | Et Page | Et Line | Pay Cntl No | Pay Dist No | Emp Rel Code | Appt Type | BU | Account | Fund | Org | Program | Project | Flexfield | Employee Last Name | Employee First Name | | | | | |
|-------------|------------|-----------------------|-------------|-------------|--------------|-----------------|----------------------|-------------------|-----------------|---------------------------|-------------------|------------|--------------------|--------------------|---------------------|----------------|-----------|-------------------|-------------|-------------------|
| Employee ID | Title Code | Payroll Period End Dt | Earn Cd/DOS | Pct/Hrs? | Pct/Hrs | Mthly/Hrly Rate | Payroll Trans Cd/ADJ | Payroll Gross Amt | Retirement Plan | Matching_Contrib/FSS/SMSP | GSTR/IAPOF/UCRPSU | OSDI/MEDCR | DENT/HLTH/VIS/OPEB | UI/GSH | WC/ESP/GSPF2 | LIFE/UCDI/GSFR | IAP/LEAVE | Benefit Gross Amt | Fiscal Year | Accounting Period |

b. Transaction View (PET) view default Column Labels

Payroll Expense Detail

Select View Transaction View (PET)

| Employee Last Name | Employee First Name | Employee ID | Title Code | Title Desc | Earn Cd/DOS | Et Month | | | | | | | | | | | | | | |
|--------------------|---------------------|-------------|------------|------------|-------------|----------|---------|-----------|---------|-----------------|-------------------|-------------------|---------------------------|-------------------|------------|--------------------|--------|--------------|----------------|-----------|
| Et Page | Et Line | BU | Account | Fund | Org | Program | Project | Flexfield | Pct/Hrs | Mthly/Hrly Rate | Payroll Gross Amt | Benefit Gross Amt | Matching_Contrib/FSS/SMSP | GSTR/IAPOF/UCRPSU | OSDI/MEDCR | DENT/HLTH/VIS/OPEB | UI/GSH | WC/ESP/GSPF2 | LIFE/UCDI/GSFR | IAP/LEAVE |

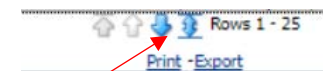
c. Benefits Expanded view default Column Labels

Hide a column by **right-clicking** on the column and selecting **Exclude column**. To bring it back, **right-click** in the table and select **Include column** to place the column the right of the current position.

Payroll Expense Detail

Select View Benefits Expanded

| Employee Last Name | Employee First Name | Employee ID | Title Code | Title Desc | Earn Cd/DOS | Et Month | BU | Account | Fund | Org | Program | Project |
|------------------------------|---------------------------|--------------------------------|--------------------------|-------------------------------|--------------------------------|-----------------------------|------------------------------|----------------------------|----------------------------|--------------------------|------------------------------|---------|
| Flexfield | Pct/Hrs | Mthly/Hrly Rate | Benefit Retmnt Match Amt | Benefit Summer Salary Dcp Amt | Benefit Sns Amt | Benefit Gradstu Tuition Amt | Benefit Jap Offset Amt | Benefit Ucrp Supplement | Benefit Oasdi Amt | Benefit Medicare Amt | Benefit Health Amt | |
| Benefit Core Medical Amt | Benefit Dental Amt | Benefit Opeb Amt | Benefit Admin Amt | Benefit Vision Amt | Benefit Annuant Health Amt | Benefit Legal Amt | Benefit Unemployment Ins Amt | Benefit Postdoc Broker Amt | Benefit Gradstu Health Amt | Benefit Workers Comp Amt | Benefit Postdoc Workcomp Amt | |
| Benefit Employee Support Amt | Benefit Gradstu Fee 2 Amt | Benefit Uc Paid Disability Amt | Benefit Uc Paid Life Amt | Benefit Core Life Amt | Benefit Postdoc Disability Amt | Benefit Postdoc Life Amt | Benefit Gradstu Fee 1 Amt | Benefit Jap Amt | Benefit Leave Accrual Amt | Benefit 2016 Supp Amt | Benefit 2016 Dc Amt | |



Blue arrows under the data tables allow you to scroll up or down the rows of the data table or click the **double sided arrow** to display all rows of available

3. Leave Accruals Report

Use the **Leave Accruals Report** to pull leave accrual balance and usage data by Employee Home Department as well as for individual employee(s). Leave (Vacation, Sick, Comp, Paid Time Off) Accruals, Begin & Ending Balances, and Usage information is available only in this dashboard. The vacation accrual max is also included.

Comparable BAIRS Reports

| /Financial Reports/080. Payroll | |
|------------------------------------|--|
| Name | |
| Leave_Employee_Balances.bqy | |
| Leave_Employee_History.bqy | |
| Leave_Reported_Usage_For_Month.bqy | |

Leave Accruals Prompts

Payroll Period End Dt Between 07/11/2017 - 07/11/2018

Show Only Vac Over within 3 Mos: Yes

Employee Home Dept: [Dropdown]

Employee Last Name begins with: [Dropdown]

Employee ID: [Dropdown]

Empl Status: [Dropdown]

Apply **Reset**

Please remove or replace the '-' in the Employee Home Dept prompt and then click Apply.

Any query that runs for more than 10 minutes will be cancelled. If this occurs, please narrow your search and click Apply again.

Employee Leave Accruals

| Full Name | Employee ID | Employee Status Desc | Employee Home Dept | Med Cont Base Cur | Med Cont Base Next | 2017 | | | 2018 | | | | | | |
|-----------|-------------|----------------------|--------------------|---------------------------|--------------------|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| | | | | | | 7 | 8 | 9 | 10 | 11 | 12 | 1 | 2 | 3 | |
| | | Active | | Vac Begin Balance | 76 | 82 | 71.77 | 83.46 | 84.08 | 77.77 | 87.92 | 98.07 | 107.77 | 102.38 | 111.61 |
| | | Active | | Vac Accrual | 76 | 82 | 9.69 | 10.62 | 9.69 | 10.15 | 10.15 | 9.69 | 10.62 | 9.23 | 10.15 |
| | | Active | | Vac Usage | 76 | 82 | 0.00 | 8.00 | 16.00 | 0.00 | 0.00 | 0.00 | 16.00 | 0.00 | 0.00 |
| | | Active | | Vacation Lost Hrs | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | Active | | Vac Balance | 76 | 82 | 81.46 | 86.08 | 77.77 | 87.92 | 98.07 | 107.77 | 102.38 | 111.61 | 121.77 |
| | | Active | | Vacation Accrual Max | 76 | 82 | 240.00 | 240.00 | 240.00 | 240.00 | 240.00 | 240.00 | 240.00 | 240.00 | 240.00 |
| | | Active | | Vac Over within 3 Mos | 76 | 82 | | | | | | | | | |
| | | Active | | Sick Begin Balance | 76 | 82 | 372.62 | 388.37 | 388.86 | 396.62 | 404.74 | 404.86 | 412.62 | 421.11 | 420.49 |
| | | Active | | Sick Accrual | 76 | 82 | 7.75 | 8.49 | 7.75 | 8.12 | 8.12 | 7.75 | 8.49 | 7.38 | 8.12 |
| | | Active | | Sick Usage | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 8.00 | 0.00 |
| | | Active | | Sick Balance | 76 | 82 | 380.37 | 396.86 | 396.62 | 404.74 | 404.86 | 412.62 | 421.11 | 420.49 | 428.62 |
| | | Active | | Comp Begin Balance | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | Active | | Comp Accrual | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | Active | | Comp Usage | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | Active | | Comp Balance | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | Active | | Comp Over 240 | 76 | 82 | | | | | | | | | |
| | | Active | | Pd Time Off Begin Balance | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | Active | | Pd Time Off Accrual | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | Active | | Pd Time Off Usage | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | Active | | Pd Time Off Balance | 76 | 82 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Print - Export

Check the **Show Only Vac Over within 3 Mos** box to display the most recent closed period's data for only the employees within three months of approaching or already exceeded their maximum allowed vacation accrual balance.

Select the desired dashboard prompts and then click the **Apply** button to update the data table.

Click the **Print** link and select **Printable PDF** for printing or **Printable HTML** for viewing and printing from your browser with additional formatting options.

Click the **Export** link to send the data to Excel. Select **Excel** format to download formatted data. Select **Data->CSV** format to download raw data.