

Dashboard Name	Tab Name (Life Event Category)	Job Aid for the Life Event Category	
<b>A. Confidential Dashboard</b>	<b>I. Action Items - Central page identify impending events, within 30 days or less, that may require action by the manager or administrator</b>	(place job link here)	
	<b>Action Item Report Names*</b>		
	<ul style="list-style-type: none"> <li>Alert - Post Docs</li> </ul>	<ul style="list-style-type: none"> <li>Expected End Date (Employee &amp; Contingent Worker) Within 28 Days</li> </ul>	<ul style="list-style-type: none"> <li>Expected End Date in the Current and Next Pay Periods plus any that are past due</li> </ul>
	<ul style="list-style-type: none"> <li>Impending Encumbrance Expiration - Expiring in the Current and Next Pay Periods</li> </ul>	<ul style="list-style-type: none"> <li>Visa - Employees with an Expired Visa</li> </ul>	<ul style="list-style-type: none"> <li>MSAT (Manager System Approval of Time)</li> </ul>
	<ul style="list-style-type: none"> <li>Employees within 25 hours of Maximum Leave Limit based on Last Closed Pay Period</li> </ul>	<ul style="list-style-type: none"> <li>Inactive Employees with Ad Comp for Selected Pay Period</li> </ul>	<ul style="list-style-type: none"> <li>Employees using &lt; 1 standard weekly hours of sick time (Rolling Year) for Last Closed Pay Period and 25 pay periods before</li> </ul>
	<ul style="list-style-type: none"> <li>Employees using &lt; 2 standard weekly hours of vacation (Rolling Year) for Last Closed Pay Period and 25 pay periods before</li> </ul>		
	<b>II. Hiring – Reports of hiring activity for a specified time frame</b>	(place job link here)	
<b>Hiring Report Names*</b>			
		<ul style="list-style-type: none"> <li>Job - PTR (Personnel Transaction Report) - Daily Hires and Rehires</li> </ul>	
	<b>III. Paying – All reports related to paying an employee</b>	(place job link here)	
<b>Paying Report Names*</b>			
<ul style="list-style-type: none"> <li>Bi-Weekly Ad Comp</li> </ul>	<ul style="list-style-type: none"> <li>Comp Time Report</li> </ul>	<ul style="list-style-type: none"> <li>Encumbrance Expiration</li> </ul>	
<ul style="list-style-type: none"> <li>DA - Leave Accrual - By Person and Department</li> </ul>	<ul style="list-style-type: none"> <li>Leave Accrual - 26 Period Trend</li> </ul>	<ul style="list-style-type: none"> <li>Leave Accrual - By Person and Department</li> </ul>	
<ul style="list-style-type: none"> <li>Leave Accrual - Employee Detail - Recorded Leave By Pay Period - Multiple Periods</li> </ul>	<ul style="list-style-type: none"> <li>Payroll Earnings Dept.</li> </ul>	<ul style="list-style-type: none"> <li>HCM (Human Resources Capital Management) - Retro Funding / CON - Retro Funding</li> </ul>	
<ul style="list-style-type: none"> <li>Alert - TL Detail Report- Batch Approved</li> </ul>	<ul style="list-style-type: none"> <li>Time and Labor Adjustments</li> </ul>	<ul style="list-style-type: none"> <li>TL (Time and Labor) - All TRC codes</li> </ul>	
<ul style="list-style-type: none"> <li>TL (Time and Labor) - All Used TRC (Time Reporting Codes) codes</li> </ul>	<ul style="list-style-type: none"> <li>TL (Time and Labor) - Payable Time - Make Adjustments</li> </ul>	<ul style="list-style-type: none"> <li>TL (Time and Labor) - Top 15 Used TRC codes</li> </ul>	
<ul style="list-style-type: none"> <li>Time and Labor - TRC (Time Reporting Codes) HISTORY REPORT - Payable Time</li> </ul>	<ul style="list-style-type: none"> <li>Time and Labor Detail Report - Payable Time - Multiple Pay Periods</li> </ul>	<ul style="list-style-type: none"> <li>Time and Labor Detail Report- Payable Time -- New</li> </ul>	
<ul style="list-style-type: none"> <li>Time and Labor Detail Report- All Active Employees (includes contingent)</li> </ul>			

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	<b>IV. Managing – All reports related to managing an employee</b>	(place job link here)	
	<b>Managing Report Names*</b>		
	<ul style="list-style-type: none"> <li>Job - Employee Delta Change Report</li> </ul>	<ul style="list-style-type: none"> <li>Employee Roster – Worcester Combined</li> </ul>	<ul style="list-style-type: none"> <li>Performance Ratings (Manager tree security only)</li> </ul>
	<ul style="list-style-type: none"> <li>Ad Hoc Personnel Transactions - Action Date</li> </ul>	<ul style="list-style-type: none"> <li>Personnel Transaction - Bi-Weekly Personnel Transaction Report by Action Date</li> </ul>	<ul style="list-style-type: none"> <li>Personnel Transaction - Bi-Weekly Personnel Transaction Report by Effective Date</li> </ul>
	<ul style="list-style-type: none"> <li>Personnel Transaction - Report per Effective Date Prompt</li> </ul>	<ul style="list-style-type: none"> <li>Expected End Date With Funding</li> </ul>	<ul style="list-style-type: none"> <li>Action Report: Visa Extension Request</li> </ul>
	<ul style="list-style-type: none"> <li>Active Visa Detail Report</li> </ul>		
	<b>V. Terminating – Reports of terminating activity for a specified time frame</b>	(place job link here)	
	<b>Terminating Report Names*</b>		
		<ul style="list-style-type: none"> <li>Job – PTR (Personnel Transaction Report) - Terminated and Retired</li> </ul>	
	<b>VI. Position Management – Reports related to filled and vacant positions</b>	(place job link here)	
	<b>Position Management Report Names*</b>		
	<ul style="list-style-type: none"> <li>HCM (Human Resources Capital Management) – PM – Current and FYTD</li> </ul>	<ul style="list-style-type: none"> <li>HCM (Human Resources Capital Management) - PM - Worcester (Worcester Only)</li> </ul>	

\*Reports displayed will vary per role. Therefore, you may not see all the reports listed on this spreadsheet per your user role in Summit.