How to: Use the Compliance Reports in Business Warehouse (BW)

Purpose: Load and review/download the Group or Individual Covid Compliance Reports in BW

System Requirements: BU username and Kerberos logon with payroll coordinator or manager access

Data/File Requirements: N/A

Table of Contents/Overall Performance Review Steps:

Step 1	Step 2a	Step 2b
Go to the BUworks Central Portal	Run/download the Covid Compliance Group Report(a)	Run/download the Covid Compliance Individual Report (b)

Step 1: Go to the BUworks Central Portal:

Both reports are housed in the reporting tab found on the BUworks Central Portal https://www.bu.edu/buworkscentral. After logging onto the link click through the following path:

- Reporting tab
  - Human Capital Management (HCM)
    - Covid Compliance (Distributed)
      - Covid Compliance Report – Group* or
      - Covid Compliance Report – Individual*
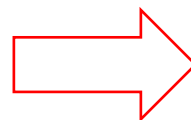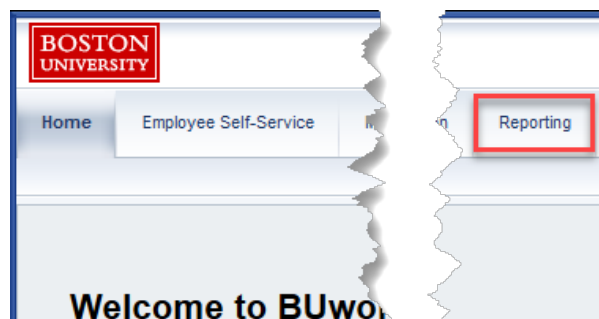
*A user can load multiple or single employees in either report, but the group report's layout makes it easy to review multiple employees in a department all at once and the individual report could then be used to view a single employee's history in more detail.

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Step 2a: - Run/view the Group Compliance Report:

Click on the **Covid Compliance Report – Group** option (see step 1 on how to get to the report).

The "**Variable Entry**" screen will load. A user can make entries to the fields and filter the population provided by the report before it runs. If a user doesn't change the default variables then a stock report will load all level 1-3 employees that a user has access to as a manager and/or payroll coordinator.

The stock report will load:

- All employees designated with testing levels 1-3 for the date range in the "**Compliant Date Range**" field. The dates will default for the previous **seven** days. Changing this date range will change the compliance dates displayed in the report output. The second date field "**Personnel Data Selection Date**" drives the display of the underlying employee personnel data and will default to the current date.

If a user wants to replicate a historical/rollup report with a full Monday – Sunday lookback fill out the following variables and leave the remaining blank:

Compliant Date Range: use dates of previous Monday – Sunday (e.g.: 10/12/2020 – 10/18/2020)
Personnel Data Selection Date: use Sunday date (e.g.: 10/18/2020)
Covid Level*: 1; 2; 3
COVID Compliancy (optional)**: 1 (setting to 1 will discard records that are both test & screening compliant)**
Affiliate Flag: No

After all variable selections are made (or if the report is run as stock) click OK on the main variable screen to run the report.

Note: the default view loads testing levels 1, 2 and 3. If you only want level's 1 and 2 then delete (backspace) 3 from the Covid Level selection.

Stock selections:

Variable Entry

Available Variants: [ ] Save | Save As... | Delete   Show Variable Personalization

General Variables

	Variable⬆⬅	Current Selection	Description
*	Compliant Date Range	10/12/2020 - 10/18/2020	10/12/2020 - 10/18/2020
*	Personnel Data Selection Date	10/19/2020	10/19/2020
	Employee		
	BU ID		
	Organizational Unit Level 5		
	Manager BU ID		
	Manager's Organizational Unit		
	Covid Level	1; 2; 3	1; 2; 3
	Covid Compliancy		
	Affiliate Flag		
	Master Cost Center		
	Personnel Area(s)		
	Personnel Sub-Area(s)		
	Employee Group(s)		
	Employee Sub-Group(s)		

OK Check

Settings to run a Mon-Sun lookback:

Variable Entry

Available Variants: [ ] Save | Save As... | Delete   Show Variable Personalization

General Variables

	Variable⬆⬅	Current Selection	Description	
*	Compliant Date Range	10/12/2020 - 10/18/2020	10/12/2020 - 10/18/2020	**Enter previous Mon- Sunday**
*	Personnel Data Selection Date	10/18/2020	10/18/2020	**Enter previous Sunday**
	Employee			
	BU ID			
	Organizational Unit Level 5			
	Manager BU ID			
	Manager's Organizational Unit			
	Covid Level	1; 2; 3	1; 2; 3	**Enter 1; 2; 3**
	Covid Compliancy	1	No	**Enter 1 (optional)**
	Affiliate Flag	No	No	**Enter No**
	Master Cost Center			
	Personnel Area(s)			
	Personnel Sub-Area(s)			
	Employee Group(s)			
	Employee Sub-Group(s)			

OK Check

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Below is an example of the report:

- The columns on the left of the report show standard personnel data as of the "**Personnel Data Selection Date**"*
- The cells highlighted in yellow and titled **Overall Result** display the total non-compliant test/screening/vaccine days and any absence hours logged for the dates loaded for the "**Compliant Date Range**" in the variable screen
  - For example, the employee above has been testing non-compliant on 3 dates during the Compliance Date Range 8/12 – 8/18/21
- The remaining columns will show daily compliance for each day listed in the header. The dates displayed are those falling in "**Compliant Date Range**"

If a user is satisfied with the information listed then they can export the report to excel for further review/manipulation. To export click the "Export to Microsoft Excel' option and the browser will save the file to a local location of your choosing.

Note: Depending on date range run and employee information between those dates it is possible that a single employee can have multiple lines of information. If any of the base information on the report screen changes during the date range selected then that employee will have multiple lines of information.

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Step 2b: - Run/view the Individual Compliance Report:

Click on the: **Covid Compliance Report – Individual** option (see step 1 on how to get to the report).

The "**Variable Entry**" screen will load. A user can make entries to the fields and filter the population provided by the report before it runs. If a user doesn't change the default variables then a stock report will load all level 1-3 employees that a user has access to as a manager and/or payroll coordinator.

The stock report will load:

- All employees designated with testing levels 1-3 for the date range in the "**Compliant Date Range**" field. The dates will default for the previous **seven** days. Changing this date range will change the compliance dates displayed in the report output. The second date field "**Personnel Data Selection Date**" drives the display of the underlying employee personnel data and will default to the current date.

Note: The individual version of the covid compliance report shows the same data as the group report, but is in a layout which is easier to view the individual history of a single or smaller group of employee(s). Instead of the daily compliance data spanning left to right it will span up and down with totals at the bottom of each employee's record.

Adding UIDs to selection screen:

For purposes of the individual version of the report it is **highly recommended that a single (or limited) # of employee UIDs*** is added to the variable screens. If a user is going to run the report for more than one employee, make sure to load the UID's with a "; " between each UID e.g: U11111111; U22222222; U333333333; u44444444

please note, if a UID(s) is entered and an employee is actually a lvl4 then their information will not load in the report unless you update the "Covid Level" variable to: 1; 2; 3; 4

Example below shows how to load UID's separated by a "; "

Variable Entry

| Available Variants: | | Save | Save As... | Delete | | Show Variable Personalization |

General Variables

	Variable⇕	Current Selection	Description
*	Compliant Date Range	10/12/2020 - 10/18/2020	10/12/2020 - 10/18/2020
*	Personnel Data Selection Date	10/19/2020	10/19/2020
	Employee		
	BU ID	U91106337; U11111111; U2	U91106337; U11111111; U22222222
	Organizational Unit Level 5		
	Manager BU ID		
	Manager's Organizational Unit		
	Covid Level	1; 2; 3	1; 2; 3
	Covid Compliancy		
	Affiliate Flag		
	Master Cost Center		
	Personnel Area(s)		
	Personnel Sub-Area(s)		
	Employee Group(s)		
	Employee Sub-Group(s)		

OK | Check

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Step 2b (continued): - Run/view the Individual report:

Below is an example of the report:

The data in this report is the same as the "group" report, but the data is laid out differently to make it easier to view an individual's compliance status in a single screen.

The layout for this report is as follows:
- The columns on the left of the report show standard personnel data as of the "**Personnel Data Selection Date**"
- The middle columns above the yellow cells show individual yes/no compliance for testing/screening/vaccine for the "**Compliant Date Range**"
  - **COVID Compliance Date**: Individual date in the compliant date range
  - **COVID Test Compliant**: Yes/No indicator for testing compliance on each specific COVID Compliance Date
  - **COVID Daily Health Screening Compliant**: Yes/No indicator for health screening compliance on each specific COVID Compliance Date
  - **COVID Vaccine Requirement Compliant:** Yes/No indicator for vaccine compliance on each specific COVID Compliance Date
- The remaining columns with red and green highlighting present a color representation for testing, daily health screening and vaccine compliance on each COVID Compliance Date
  - The bottom of these columns will total non-compliant days for the range

If satisfied with the information listed, then export the report to excel for further review/manipulation. To export, click the "Export to Microsoft Excel" option and the browser will save the file to a local location of your choosing.