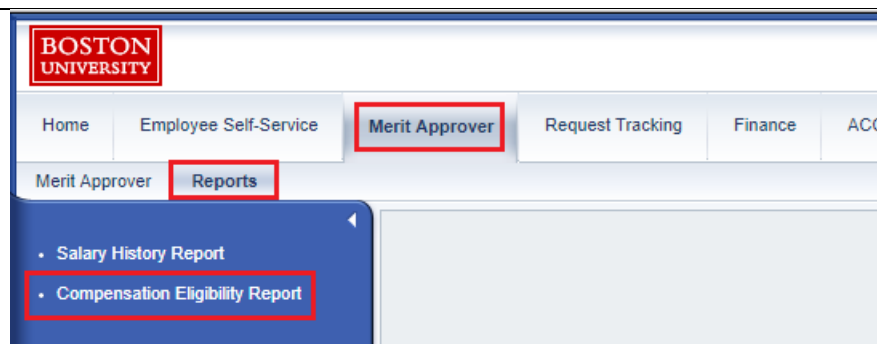


How to run the ECM Eligibility Report

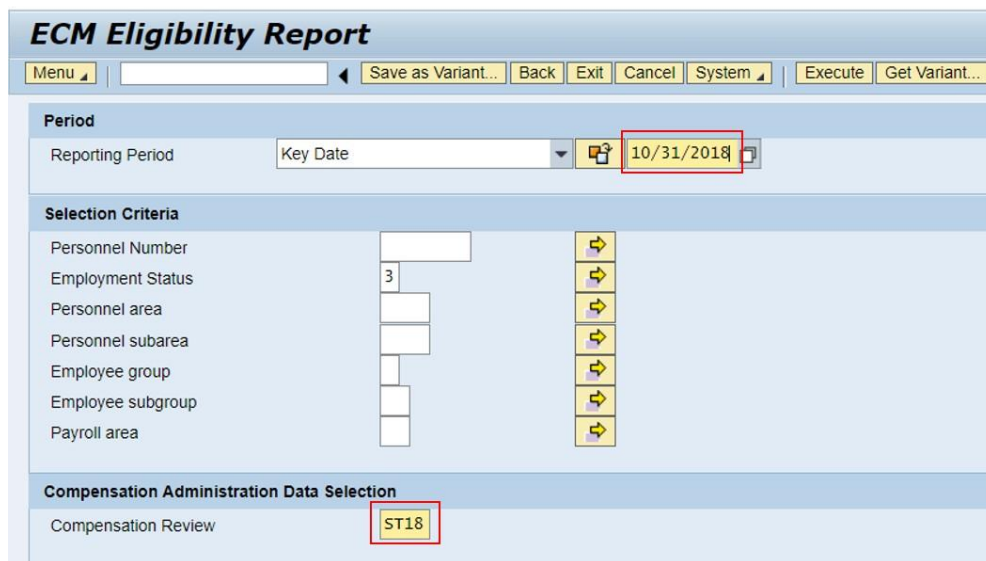
Prior to, and during, the merit review process, ECM recommenders and approvers must review the eligibility list of employees in their planning org units. It is imperative that if an employee needs to have their status updated to eligible or not eligible that you contact your compensation analyst as soon as possible so the employee can be removed or added to the ECM process and worksheets. The addition or removal process can take up to a full business day once your analyst is notified.

The instructions below will show an ECM recommender or approver how to load and run the ECM Eligibility Report. If you have any questions on this or any other ECM process please contact hrcomp@bu.edu



How to load the ECM Eligibility Report:

1. Log on to **BUworks Central**: www.bu.edu/buworkscentral
2. Depending on your access, click the **Merit Approver** or **Merit Recommender** tab (in this example, the Merit Approver Tab is displayed)
3. Click on **Reports**, then **Compensation Eligibility Report**
4. The **ECM Eligibility Report** will load in the main window



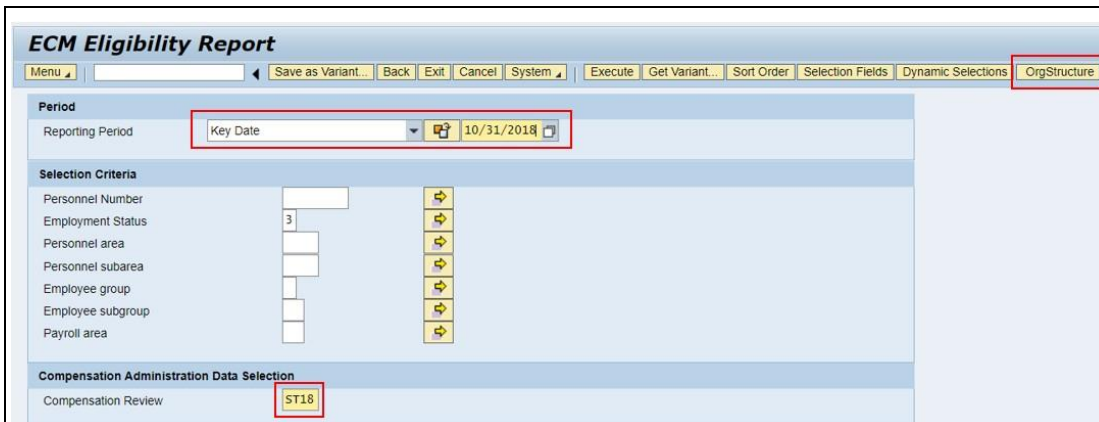
How to run the ECM Eligibility Report:

1. **Reporting Period** select **Key Date** and enter 10/31/20[XX]
2. **Compensation Review** select: **Staff Review 20[XX]** or enter **ST[XX]** (last 2 digits of the year in which the merit cycle begins)

In the example to the left, 10/31/2018 is entered as the Key Date and ST18 is selected for the Compensation Review. These dates are for the merit cycle that began in 2018 with merit increases effective January 1, 2019.

3. Click **Execute** to run the report for all the orgs you are responsible for, if you want to narrow down the org units you are running the report for follow the instructions below

How to run the ECM Eligibility Report



ECM Eligibility Report

Menu | Save as Variant... | Back | Exit | Cancel | System | Execute | Get Variant... | Sort Order | Selection Fields | Dynamic Selections | **OrgStructure**

Period

Reporting Period: Key Date | 10/31/2018

Selection Criteria

Personnel Number: []

Employment Status: 3

Personnel area: []

Personnel subarea: []

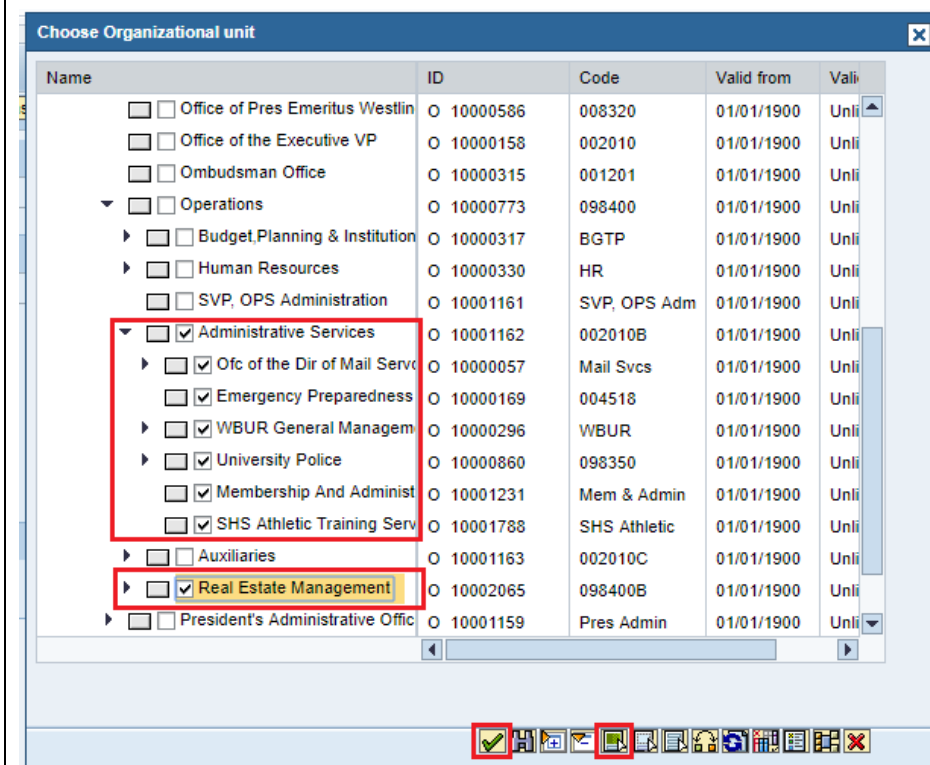
Employee group: []

Employee subgroup: []

Payroll area: []

Compensation Administration Data Selection

Compensation Review: **ST18**





Choose Organizational unit

Name	ID	Code	Valid from	Valid to
<input type="checkbox"/> Office of Pres Emeritus Westlin	O 10000586	008320	01/01/1900	Unli
<input type="checkbox"/> Office of the Executive VP	O 10000158	002010	01/01/1900	Unli
<input type="checkbox"/> Ombudsman Office	O 10000315	001201	01/01/1900	Unli
<input checked="" type="checkbox"/> Operations	O 10000773	098400	01/01/1900	Unli
<input type="checkbox"/> Budget, Planning & Institution	O 10000317	BGTP	01/01/1900	Unli
<input type="checkbox"/> Human Resources	O 10000330	HR	01/01/1900	Unli
<input type="checkbox"/> SVP, OPS Administration	O 10001161	SVP, OPS Adm	01/01/1900	Unli
<input checked="" type="checkbox"/> Administrative Services	O 10001162	002010B	01/01/1900	Unli
<input checked="" type="checkbox"/> Ofc of the Dir of Mail Serv	O 10000057	Mail Svcs	01/01/1900	Unli
<input checked="" type="checkbox"/> Emergency Preparedness	O 10000169	004518	01/01/1900	Unli
<input checked="" type="checkbox"/> WBUR General Managem	O 10000296	WBUR	01/01/1900	Unli
<input checked="" type="checkbox"/> University Police	O 10000860	098350	01/01/1900	Unli
<input checked="" type="checkbox"/> Membership And Administ	O 10001231	Mem & Admin	01/01/1900	Unli
<input checked="" type="checkbox"/> SHS Athletic Training Serv	O 10001788	SHS Athletic	01/01/1900	Unli
<input type="checkbox"/> Auxiliaries	O 10001163	002010C	01/01/1900	Unli
<input checked="" type="checkbox"/> Real Estate Management	O 10002065	098400B	01/01/1900	Unli
<input type="checkbox"/> President's Administrative Offic	O 10001159	Pres Admin	01/01/1900	Unli

How to run the ECM Eligibility Report for certain Org Units:

1. For **Reporting Period** select **Key Date** and enter 10/31/20[XX]
2. **Compensation Review** select: **Staff Review 20[XX]** or enter **ST[XX]**

In the example to the left, 10/31/2018 is entered as the Key Date and ST18 is selected for the Compensation Review. These dates are for the merit cycle that began in 2018 with merit increases effective January 1, 2019.

3. Click the **Org Structure** button at the top of the screen
4. Use the **Choose Organizational Unit** screen to navigate the hierarchy to the orgs you want to view eligibility for and check the box next to the org name, if you want to also select any sub units that report to the selected org you can expand and check off each sub org or you can click/highlight the parent org and click "**Select Subtree**": 
5. Once all your org units are selected click the **Continue** button: 
6. When you return to the main selection screen click **Execute**



How to run the ECM Eligibility Report

ECM Eligibility Report

Menu | Back | Exit | Cancel | System | Details | Sort in Ascending Order | Sort in descending order | Set filter | Total | Print preview | Local file... | Mail F

Eligible / Ineligible Report

As of selection date: 07/01/2018

Rev Item	Review Item Text	Eligible	MCC	MCC Name	Empl. Org Unit	Empl. Org Unit Name	Last Name	First Name
U118	L2324 Review 2018	Yes	1472010000	ENGINEERS/TECH	10000298	WBUR Engineers/Technici	DER	JOHN
U118	L2324 Review 2018	Yes	1860090010	IND. CUSTODIAL	10000818	Custodial Services	JOHN	RET

Annual Salary	Base Rate Amount	Position No	Position Title	Job	Grade	Hire Date	Assign. Duration
22,222	22,222	50001039	OPERATOR, SR. COMPU	Spec. Client Supt Serv	GR26	10/16/1998	12 Month - 52 Weeks
22,222	22,222	50001242	COORDINATOR, STAFF	Coord II, Administrative	GR25	12/01/2008	12 Month - 52 Weeks

Percent Time	Empl. Status	Leave Status	Leave Reason	Leave Start Date	Normal Hrs Worked	Pers. Area	Pers. Sub Area	Empl. Group	Empl. Sub Group	Pernr	BU ID
100	Active				40.00	Charles River Campus	L2324-Cler/Tech	Staff-NonExempt FT	Cler/Tech/Svc/RSCler	222222	U22222222
100	Active				40.00	Charles River Campus	L2324-Cler/Tech	Staff-NonExempt FT	Cler/Tech/Svc/RSCler	222222	U22222222

Change Layout

Column Selection | Sort Order | Filter | Display

Displayed Columns

Column Name

Rev Item

Review Item Text

Eligible

MCC

MCC Name

Empl. Org Unit

Empl. Org Unit Name

Last Name

First Name

Annual Salary

Column Set

Column Name

Deans Comments

Rank

Tenure Status

Tenure Eff Date

High Degree Year

Prior FY Annl Sal

Prior FY Base Rate

Pri 2 FY Annl Sal

Pri 2 FY Base Rate

✓ | ✗ | ↺ | ↻

Columns on the ECM Eligibility Report:

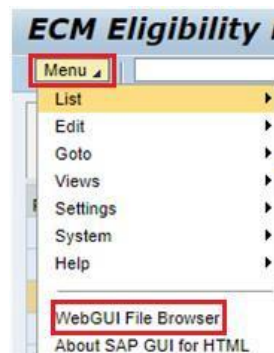
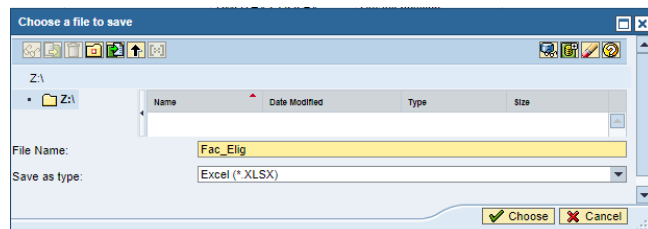
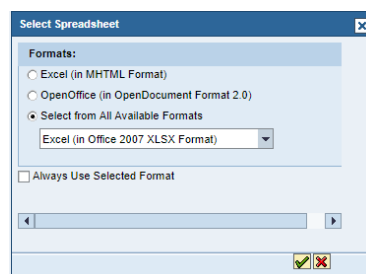
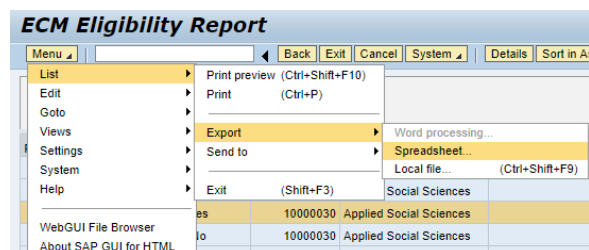
The report will provide points of ECM and demographic information such as:

- Review Item/Review Item Text
- Eligibility
- Master Cost Center
- Org Unit
- Last, First Name
- Annual Salary, prior to current review cycle
- Base Rate
- Position # and Title
- Job
- Salary Grade
- Hire Date
- Assignment Duration and Percent Time
- Employment Status
- Leave Status, Reason and Start Date (LOA, if applicable)
- Personnel Area and Personnel Sub Area
- Employee Group and Employee Subgroup
- Pernr and BUID

The order of the columns can be updated by changing your layout, in order to change select the following:

1. Click **Change layout...** along the top of the report.
2. When the **Change Layout** screen loads you can click/highlight the data point you want to move and use the up/down arrows to change the location of the column.
3. Once you are happy with your column order click the **Green Check:** ✓

How to run the ECM Eligibility Report



How to Export the Eligibility Report:

1. After the report runs, to export, click on **Menu -> List -> Export -> Spreadsheet**
2. Select **Excel (in Office 2007 XLSX Format)**, then click the green check **Continue** button:
3. In the **Choose a file to save** window name your file and then click the green check **Continue/Choose** button: and click OK on the following popup. After clicking OK a popup window should appear with the downloaded file to open. Double click on the Excel icon, the file will then open and you can edit/save as you wish.
4. If the pop-up does not appear you can find/download the file by clicking the **Menu** button and selecting **WebGUI File Browser**, when the following screen loads double click the file you want to download. The browser will then download the file and you can open it by clicking the Excel icon.