EXPLORE ARIZONA THROUGH DATA

Business Officer Central, DCCs, and Employee Transfers
OVERVIEW

- Introductions
- Exploring Business Officer Central
- Exploring DCCs dashboard
- Exploring Employee Transfers dashboard
- Conclusion
WHO WE ARE & WHY WE ARE HERE

UAIR IS COMMITTED TO providing data that empowers campus decision makers, informs policy and practice, and tells the Arizona story.
What’s changed and how can I use it?
WELCOME | Who is here today?

Survey Question: Please rank your level of experience with the following UAccess Analytics products/services.
ACKNOWLEDGEMENTS | UAIR Team Members

TODAY’S PRESENTERS

- Christopher Cherry, IT Training & Support Specialist
- Nick Martin, Data Analyst
- Mitch Owen, Senior Business Intelligence Developer

TODAY’S PANELISTS

- Zelene Zazueta, Data Analyst
- Eddie Caratachea, Assistant Director
- Ashley Hurand, Assistant Director
Why Business Officer Central?

• Go beyond a refresh of Business Manager Home Page
• Work with stakeholders to build something truly useful
• Create a portal to easily keep track of action items
Business Officer Central
Business Officer Central

- Replacing the *Business Manager Home Page* (BMHP) dashboard.
- Can be found in UAccess Analytics under the Employee section of Dashboards
Business Officer Central Highlights

Department Highlights

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>Positions</th>
<th>Job FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>86</td>
<td>86</td>
<td>67.4</td>
</tr>
</tbody>
</table>

- Provides high level information about the department(s) workforce
- The "More Details" links goes to the All Active Employees dashboard page for additional details
## Business Officer Central Highlights

- **Special Dates & Milestones**

  - **Table with the employee birthdays and work anniversaries occurring this month or fiscal year**

  - The EMPLID column contains links which goes to the **Employee Details** dashboard page for additional details about that Employee

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Person Name</th>
<th>Birthdate</th>
<th>Years of Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/14</td>
<td></td>
<td>01/14</td>
<td>22</td>
</tr>
<tr>
<td>01/31</td>
<td></td>
<td></td>
<td>16</td>
</tr>
</tbody>
</table>
Business Officer Central Highlights

Items for Review

Workforce

- Employees with Projected Hours Exceeding Allowed Carry Forward
  
- Employees in New Hire Process
  
- Employees on LOA/Sabbatical
  
- Employees with Pending Time Approvals
  
- Employees in Benefit Enrollment Process
  
- Employees with Visas Expiring Within 90 Days
  
- Employee with FLSA Status Change Applied

Financials

- PCard Action Items

The "More Details" links will go to a dashboard page providing additional details for that specific review item.
Benefits Enrollment

- This dashboard displays employees who have not enrolled in benefits for open enrollment as well as new hires and benefits-eligible employees who have not made a retirement election or enrolled in benefits.

Summary

Number of Employees

<table>
<thead>
<tr>
<th>Event</th>
<th>Notified</th>
<th>Prepared</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>401 Retirement, no wait</td>
<td>3</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Hire</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retirement Election (ORP elig)</td>
<td></td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Grand Total</td>
<td>3</td>
<td>8</td>
<td>11</td>
</tr>
</tbody>
</table>

Details
Missing Supervisor/Time Approver

- Brand new dashboard page
- Displays currently active employee positions missing a supervisor and/or a time approver.

Summary

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>Missing Supervisor or Time Approver</th>
<th>UA Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>322</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missing Supervisor &amp; Time Approver</td>
<td>74</td>
</tr>
<tr>
<td>Missing Supervisor Only</td>
<td>92</td>
</tr>
<tr>
<td>Missing Time Approver Only</td>
<td>170</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UA Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grad&lt;br&gt;Associate, Teaching</td>
</tr>
<tr>
<td>Grad&lt;br&gt;Associate, Research</td>
</tr>
<tr>
<td>Student Group B</td>
</tr>
</tbody>
</table>

Detail
Retirement Eligibility

- This dashboard displays part-time employees in non-benefits eligible pay groups that may be subject to participating in a mandatory retirement plan.
Unenrolled Student Employees

This dashboard is used to display student employees who are enrolled in less than 6 credit hours.

The Credits Taken date is only included for the Spring and Fall terms. The report will display "NOT ENROLLED" when run during the Summer or Winter terms. The Student Credit data refreshes every Monday during the Spring and Fall terms.

Summary

Number of Unenrolled Student Employees

115

Details
# UAccess Enroute Transactions

This dashboard displays enroute transactions across all UAccess systems. By clicking on any of the numbers in blue, you will be directed to a dashboard page providing more details for that transaction type.

## Financials

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Initiated</th>
<th>Pending Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grand Total</td>
<td>54</td>
<td>116</td>
</tr>
<tr>
<td>Disbursement Voucher</td>
<td>47</td>
<td>28</td>
</tr>
<tr>
<td>Distribution Of Income And Expense</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Effort Certification</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Payment Request</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Procurement Card</td>
<td>56</td>
<td></td>
</tr>
<tr>
<td>Purchase Order Amendment</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Requisition</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Salary Expense Transfer</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

## Employee

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Initiated</th>
<th>Pending Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grand Total</td>
<td>66</td>
<td>8</td>
</tr>
<tr>
<td>Approval for Supplemental Comp</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Create or Modify Positions</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Grade Notes</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I9 Form Approvals</td>
<td>37</td>
<td>4</td>
</tr>
<tr>
<td>Job Change Approvals</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>MSS Campus Colleague</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>MSS Campus Colleague Modify</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>MSS Exception</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>MSS New Hire</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>MSS Personal Info Update</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

## Research

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Initiated</th>
<th>Pending Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grand Total</td>
<td>7</td>
<td>1</td>
</tr>
<tr>
<td>Administrative Change ($0)</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>New</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Renewal (Competing)</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Revision (continued/supplement, not yet reimb)</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

## Budget

No records found.

If you believe that you have received this message by error, please email the Admin Data team at useradmin-data@email.arizona.edu with the dashboard name and defined filters when you received this message.
Payment Requests | Summary

- Provides aggregate level highlights and trends for payment requests

**Summary**

This dashboard displays payment requests, both approved and pending, on an account level and detailed transaction level. Requests made with negative hours are excluded from this page.

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>Number of Requests</th>
<th>Amount Requested</th>
<th>Hours Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>18</td>
<td>$4,998</td>
<td>0</td>
</tr>
</tbody>
</table>

- Requests for Amounts: 18
- Requests for Hours: 0

- Amounts per Request: $277.69
- Hours per Request: 0.00

**Breakdowns**

- Amount Requested by Request Target
  - Additional Pay: $2,101 (41.7%)
  - Paycheck Other Earning: $3,004 (58.3%)

- Amount Requested by Request Type
  - Child Care Voucher Program
    - Number of Employees: 3
    - Requests for Amount: 13
    - Amount: $3,141
    - Amount per Request: $241.63
  - Refund (Breastfeeding)
    - Number of Employees: 5
    - Requests for Amount: 5
    - Amount: $3,857
    - Amount per Request: $771.45

**Trends**

- By Month (as selected in the approval date prompt)
- By Fiscal Year (5 most recent fiscal years from the current fiscal year)
Payment Requests | Detail

- Provides the individual payment requests detail

This dashboard displays payment requests, both approved and pending, on an account level and detailed transaction level.
Pay Check

- This dashboard displays pay check/advice report information for all employees within a specified distribution department and pay period.
Service Awards

- This dashboard displays the employees receiving a service award in the current fiscal year.

Summary

- Number of Employees: 3
- Service Awards Received:
  - 10 YEAR: 1 employee
  - 15 YEAR: 2 employees

Details

<table>
<thead>
<tr>
<th>College for Home Title Department</th>
<th>Home Title Department</th>
<th>Award</th>
<th>Service Award Year</th>
<th>Years of Service (Based on Service Year)</th>
<th>Employee ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Employee Status</th>
<th>Original Hire Date</th>
</tr>
</thead>
</table>
Retiree Recognition

This dashboard displays employees who have retired within the current fiscal year.

Summary

Number of Employees

<table>
<thead>
<tr>
<th>Years of Service</th>
<th>Number of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>41-50 Years</td>
<td>6</td>
</tr>
<tr>
<td>31-40 Years</td>
<td>21</td>
</tr>
<tr>
<td>21-25 Years</td>
<td>30</td>
</tr>
<tr>
<td>11-20 Years</td>
<td>41</td>
</tr>
<tr>
<td>6-10 Years</td>
<td>19</td>
</tr>
<tr>
<td>5 or less Years</td>
<td>5</td>
</tr>
</tbody>
</table>

Number of employees that have retired during the current fiscal year: 130

Retirement Trends

Details

<table>
<thead>
<tr>
<th>College for Home Title Department</th>
<th>Home Title Department</th>
<th>Retirement Date</th>
<th>Employee ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Award</th>
<th>Service Award Year</th>
<th>Years of Service (Based on Service Year)</th>
<th>Original Hire Date</th>
</tr>
</thead>
</table>
Affordable Care Act (ACA)

- This dashboard displays part-time employees in non-benefits eligible pay groups that may be subject to being offered benefits under the Affordable Care Act (ACA).
Student Overhead

- This dashboard displays the student overhead charged to the account of a specific unit.
The purpose of this dashboard is to allow Business Managers to track their out-of-state employees. Employees who have an out-of-state business address show up in this dashboard and are considered out-of-state employees. ...
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Overview

- Main navigation pane for the Business Officer Central dashboard pages
- Descriptions for every page/sub-page provided in the accordion

Welcome to the Business Officer Central Dashboard! This dashboard provides a means of monitoring business manager employee information.

Dashboard Page and Sub-Page Descriptions

- Business Officer Central Highlights
- UAaccess Enroute Transactions
- Payment Requests
- Pay Check
- Service Awards & Retiree Recognition
- Retirement Eligibility
- Unenrolled Student Employees
- Affordable Care Act (ACA)
- Benefits Enrollment
- Student Overhead
- Out-of-State Employees
- Missing Supervisor/Time Approver

We Want to Hear From You

Welcome to the Employee Dashboards!

These dashboards contain a set of reports related to Employee and HR data. Some modifications and adjustments may be needed, and we certainly welcome your input!

If a report isn’t working as expected, you think the data is incorrect or you have suggestions for improvement, please submit Feedback using the link below. Be as specific as possible.

If you need a report similar to one you find on these dashboards but customized to your specific unit needs, consider “stealing” that request and customizing it to make it your own.

Dashboard Feedback

Contact

For additional contact information please go to the Additional Resources page.
Overview | Additional Resources

Contains links for contact information, additional reports, and forms.

This page displays contact information, additional reports, and forms. Each report and form can be clicked on to open that item.

If contact information needs to be updated, please notify uair-admin-data@list.arizona.edu

Contact

Dashboard Feedback:
Email: uair-admin-data@list.arizona.edu

Payroll Information:
Email: payroll@fso.arizona.edu

Benefits Information:
Email: hr_solutions@email.arizona.edu

FSO Information:
https://www.fso.arizona.edu/contact

Workforce Systems Information:
Email: workforce@arizona.edu

Recruitment Information:
https://hr.arizona.edu/supervisors/recruitment

Service Award & Retiree Recognition Information:
Email: serviceawards@email.arizona.edu

Additional Reports

Bulk Mail Information
Changes to H1 and J1 Visa Holders (Within Last Month)
Department Payroll Representatives
Expiration of Visas for H1 and J1 Visa Holders (Current Pay Period)
Terminated Employees By Department
UA Care's Payroll Sheet Information
Vacant Positions Report

Forms

Human Resource Forms (https://hr.arizona.edu/forms)
Personnel Action Form (PAF)
Personnel Action Form (PAF) by Department
Personnel Action Form (PAF) by Department and Contract Length
Personnel Action Form (PAF) by Department and Paygroup
Position Control Form
Title Form
Travel Authorization
Employee > Workforce Dashboard Pages
Designated Campus Colleagues

- The "Designated Campus Colleagues" page is connected to Business Officer Central Highlights.
Designated Campus Colleagues

- Displays the DCC's of a unit

**Designated Campus Colleagues**

Designated Campus Colleagues (DCCs) contribute their time, services, and expertise to help the University accomplish its missions of teaching, research, and service. This dashboard is designed to support the management of these relationships.

If you would like more information on DCCs, please visit the Human Resources - Designated Campus Colleagues web page.

### Summary

<table>
<thead>
<tr>
<th>Number of DCC's</th>
<th>Number of DCC Types</th>
<th>Number of UA Titles</th>
<th>Number of Sponsors</th>
<th>DCC's per Sponsor</th>
<th>Number of Affiliations</th>
<th>DCC's per Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3.0</td>
<td>1</td>
<td>10.0</td>
</tr>
</tbody>
</table>

### Number of DCC Attributes

<table>
<thead>
<tr>
<th>DCC Type</th>
<th>Number of DCC's</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Contractor</td>
<td>8</td>
<td>80.0%</td>
</tr>
<tr>
<td>Government Agency Staff</td>
<td>1</td>
<td>10.0%</td>
</tr>
<tr>
<td>Inter-institution Fac/Staff</td>
<td>1</td>
<td>10.0%</td>
</tr>
</tbody>
</table>

### Sponsors and Affiliations

<table>
<thead>
<tr>
<th>Sponsor Name</th>
<th>Number of DCC's</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6</td>
<td>80.0%</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>10.0%</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>10.0%</td>
</tr>
</tbody>
</table>
Employee Transfers

- Previously the "Inter-Department Transfers" dashboard page
- Displays the transfers, into and out, of a specific college or department

The image shows a dashboard with summary and details sections for employee transfers. The summary section displays trends over different fiscal years, while the details section lists specific transfers with new titles and departments.
THE VALUE OF CUSTOMER EXPERIENCE

UAIR is here to provide ongoing customer experience, training, and support. We want the campus community to have the knowledge and the know-how to take full advantage of our products and services.
STILL WANT TO KNOW MORE?

TAKE ADVANTAGE OF OUR KNOWLEDGE. UAIR is here to enhance data literacy and customer experience for campus.

- **UAIR Newsletter**  
  (providing information and news to the campus community)

- **UAccess Analytics Training**  
  (basic & intermediate level workshops)

- **Analytics Office Hours**  
  (visit with our staff to have your individual questions answered)

- **UAccess Community**  
  (a community of users and resources)

- **Data Exploration Series**  
  (providing quarterly data literacy presentations)

Visit our website for more information or to sign-up: [https://uair.arizona.edu/](https://uair.arizona.edu/)
THANK YOU

Let us know how we did. Please take our survey!