How to Create Employee Sets

Step by Step Guide in How to Setup Employee Sets for Use in Consolidating Cost Centers That an Employee is Responsible For to Easily Group and View on Webbasis Using the Dart Application
Possible Uses of Creating Employee Sets

This is a great tool to use when you want to display cost centers for an employee in a report type format for ease of viewing and locating information.

This allows you to segregate cost centers for an employee so that the information can be immediately reviewed by the employee via webBASIS in the order he/she may want to see the information.

Prior to starting your sets you should have a good idea of how you want to see the information laid out for the employee to view.

Once defined, the administrator also has the ability of viewing these sets via the Administrator login.

In the following example I am going to segregate cost centers for an employee who is responsible for viewing expenses for several areas.
Step 1: Creating the Employee Set

Before you start defining your Employee sets, you need to have a good idea of what you are wanting to track. In my example I am creating this set under my name, but please note that you would normally be creating these sets for other employees. I want this employee to easily view the cost centers for each area she oversees in regards to the expenses for that particular area for which he is the responsible PI or Administrator. In this example, there are 3 groupings I want to use to signify the different areas of each grant.

1. Type **EFRD** (Emp Financial Report Set,) in the Command Field; tab to the Action Field and type an ‘A’ (add); press ‘enter’.

2. Your cursor will be displayed in the Emp ID Field. Press **PF1** to activate the help routine to select the employee ID for whom you are creating the set. Once you have selected the employee, their ID will display in this field.

3. Tab to the Report Set field and type the 4 digit name you are using to create this set. In my example I am naming the Report Set **SDEV** so I am typing that code in this field.

4. Tab to the DAC Field and type the first Departmental Accounting Center that will be used in this set. (In most instances the DAC and the Company Cost Center are the same, with the exception of Agri.) Press ‘Enter’.
Step 2: Defining the Report Groupings for the Employee Set

This step will define how each DAC is grouped within the Employee Set.

1. Your cursor will be in the Description Field. This is where you will name the Report Set. In my example I am going to name the Report Set: **Pre College Programs**

2. Tab to the Report Group Field and type the group name you want to give to this Employee Set. (Remember I already decided I was going to create 3 groups for this set) You may also press **PF1** to select a Report Group already created. I am going to type: **ETS**.

3. Now in the Description Field type a description of the Report Group identified. (If you selected a Report Group from your list, this field will already be populated with the description). For this example I am typing: **Educational Talent Search**. Press ‘**enter**’ to validate. You will receive a message, if you are entering a new Report Group that says “**Report Group ETS will be created**”. Press **PF10** to Save the new Report Group.

4. Repeat Steps 1 and 2 for all DACs that are being used either for this same Report Group or for any other Report Groups you are creating for your Employee Set.
Listing DACS for an Employee and Set

Once you have created the Employee Set and included the Report Groups and DACs, this list is a good one to use to make sure you have included everything the way you meant for it to be.

1. Type **LERS** (List Employee financial Report Set) in the Command Field and press ‘**enter**’.

2. In the **Emp ID** Field either type the Employee ID of the person you created the Set for, or press the **PF1** (help) to search for the **Emp ID**.

3. In the **Report Set** Field either type the set name you created or Press **PF1** to select from the list for the **Emp ID** you entered.

4. Press ‘**enter**’ and the list of DACs along with the Report Group will be listed.
Step 3: How the Employee Views the Employee Sets You Created

Once you have created the Employee Financial Set, the employee you created this for can view this information on webBASIS when they log in via the Employee/Affiliate Access.

1. Once they login, they will select the ‘My Cost Centers’ link.
1. Now the employee will select the ‘My Financial Report Sets’ link
How the Employee can view the set via webBASIS

1. This particular example, is of the Employee Financial Report sets that have been setup for my Emp ID.
2. Notice the last set of **SDEV** is the Employee Set just created.
3. You will also see that there are 3 groups with a total of 6 DACS included.
4. Notice that there are 3 Actions to Perform: The default is to show *Period totals for an Emp Set*, but you may also choose to look at *LifeToDate* or *Mixed Totals*, if the cost centers included in your set are for both *LifeToDate* and *Period Based*. 
In this example I changed the Action to Perform to be *LifeToDate* and then selected the **SDEV** Employee Set. The following information is now displayed:

![Image of spreadsheet showing Life-To-Date Totals for Employee Set]

- Click to download the accounting detail to Excel.
- There is a link to download the accounting detail to Excel.
- Notice that each Grouping has a total.
- A total for ALL groups in the Set.
You Can Also View Sets Created via the Administrator Menu

You, as an Administrator, have the ability of viewing Employee Sets by accessing sets via the Administrator Menu. Once you have logged in, follow these steps:

1. Select the **Administrator Menu**
3. You will now have the ability of searching for the Employee ID for which you want to view the sets.
4. To search for an Employee ID select the Employee ID link and a search help will be available for you to type the employee last name, first name to find.
5. If the Employee ID you selected has had Employee Sets created for their ID then they will be displayed.
6. You can now select a set to view the DACs included for that specific set.

I have the option of looking at Periods, LTD, or mixed.

This set has 14 groupings consisting of 18 different DACs
Once you select the Set Name you will see the groups you have defined. In this example there are 14 different groupings. This is just a snapshot of the first 3. IMPORTANT: since I had selected on the previous screen that I wanted to see period based, you must insure that you use correct dates when you get to this screen.

There is the ability of downloading the detail for the set to excel for further analysis.

<table>
<thead>
<tr>
<th>DAC</th>
<th>Beginning Balance</th>
<th>Budget</th>
<th>Expense</th>
<th>Encumbrance Planned</th>
<th>06/2012 Ending Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSOY Breeding Soybeans</td>
<td>128,387.68</td>
<td>180,000.00</td>
<td>-134,038.35</td>
<td>-13,749.83</td>
<td>160,599.50</td>
</tr>
<tr>
<td>IN:SPB BREEDING CHEN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Breeding Soybeans for High Yield and Multiple Pest Resistance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CTS Chloride Toxicity in Soybeans</td>
<td>23,749.64</td>
<td></td>
<td>-23,749.64</td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>IN:SPB SOYBEAN CHLORIDE TOXICITY CHEN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DSA Drought Stress in Arkansas</td>
<td>-5,295.12</td>
<td>55,833.00</td>
<td>-22,210.80</td>
<td></td>
<td>28,327.08</td>
</tr>
</tbody>
</table>