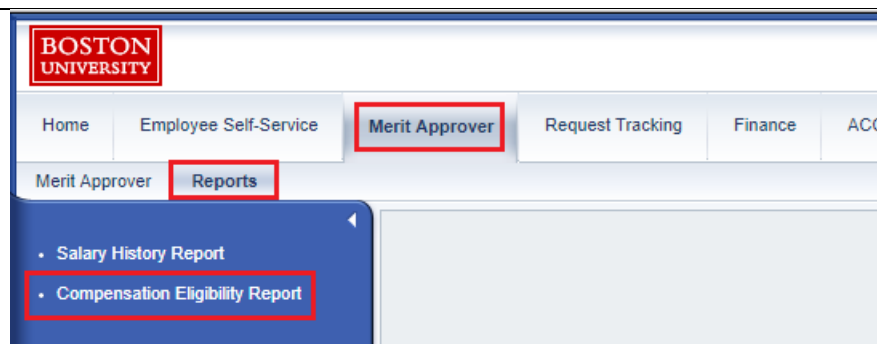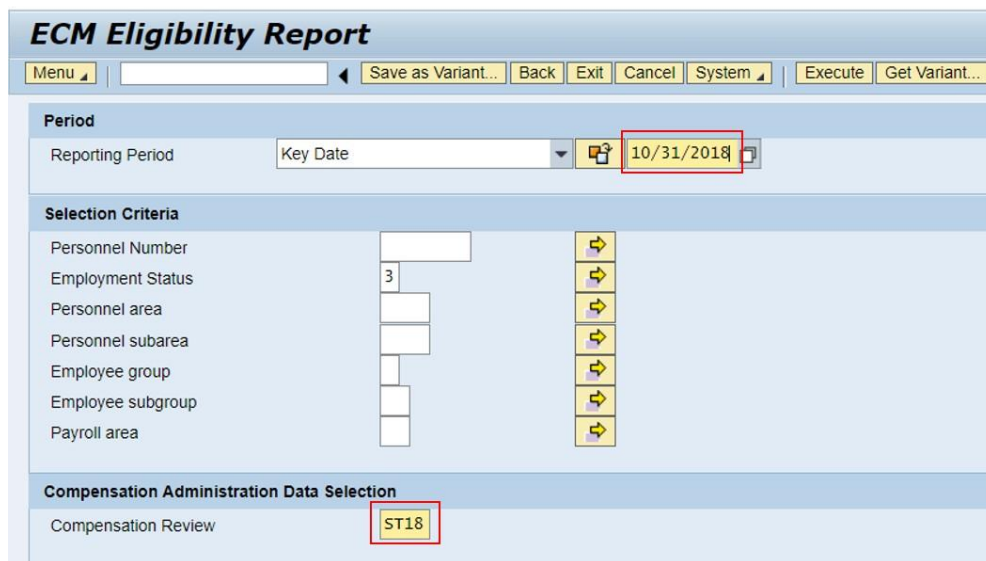# How to run the ECM Eligibility Report

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

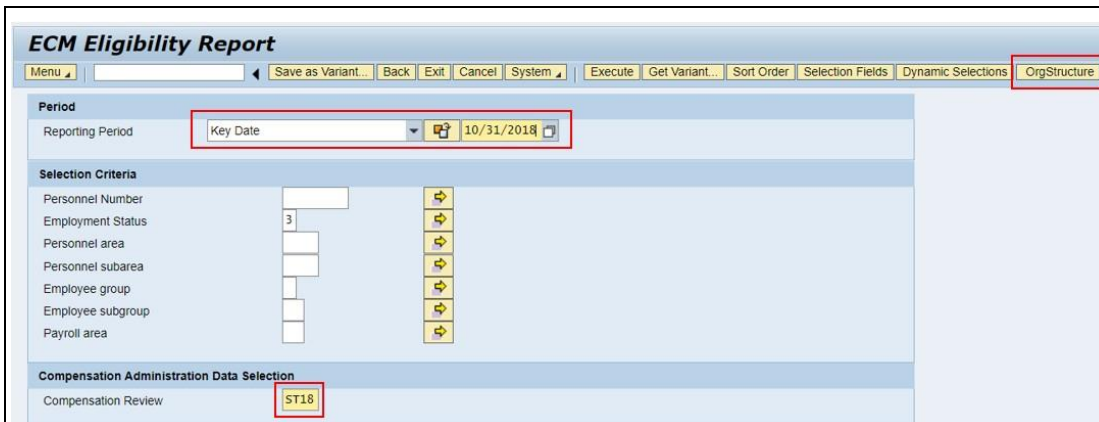|	
	How to load the ECM Eligibility Report: 1. Log on to **BUworks Central**: www.bu.edu/buworkscentral 2. Depending on your access, click the **Merit Approver** or **Merit Recommender** tab (in this example, the Merit Approver Tab is displayed) 3. Click on **Reports,** then **Compensation Eligibility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

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
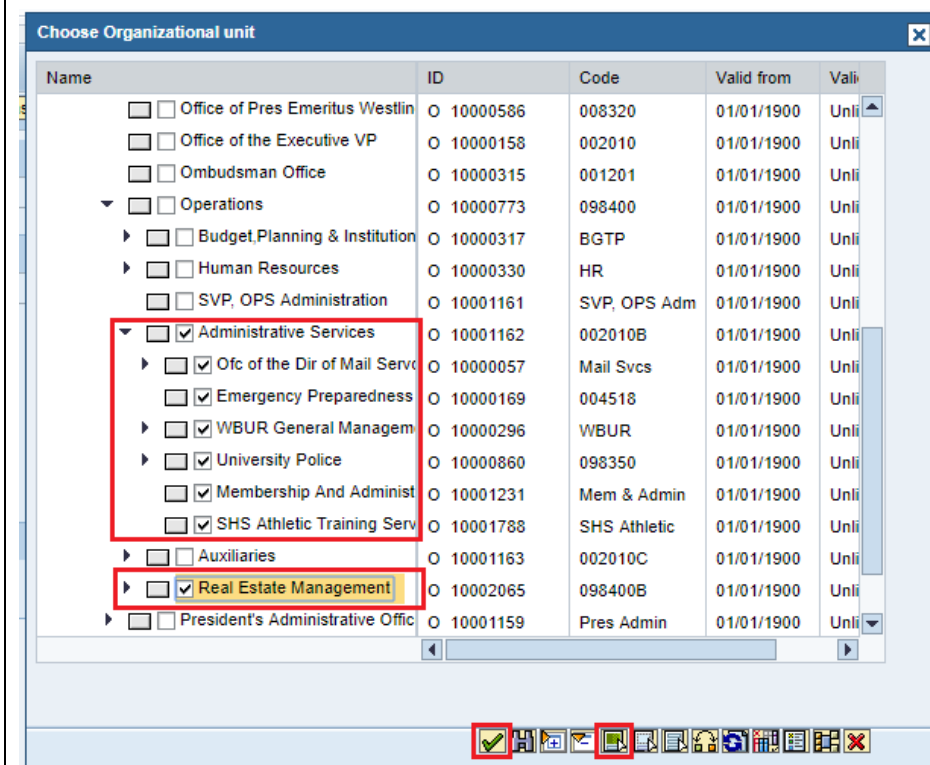
4. Use the **Choose Organizational Unit** screen to navigate the hierarchy to the orgs you want to view eligibility for and check the box next to the org name, if you want to also select any sub units that report to the selected org you can expand and check off each sub org or you can click/highlight 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**

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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**: ✅
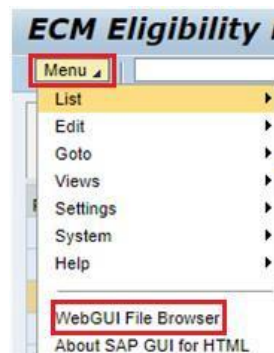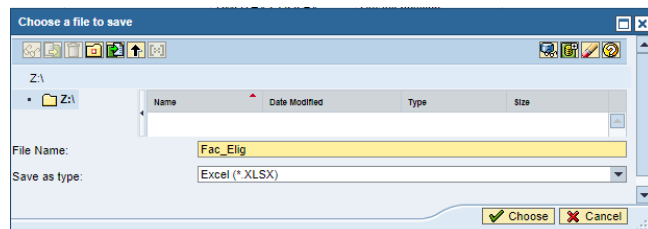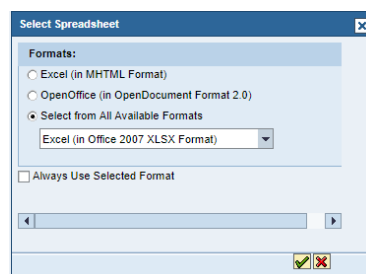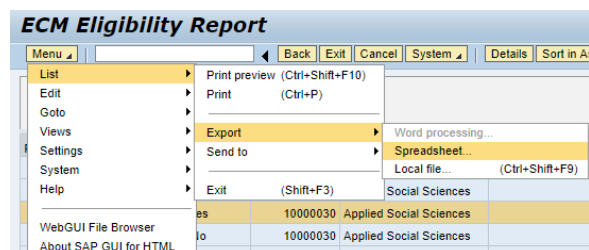
How to Export the Eligibility Report:

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.