SANDI Fiscal Year Summary Report

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Overview

The SANDI is a fiscal year summary report, generated for an HR Organizational Unit (department) that includes HR appointment, salary distribution and estimated payroll data. The data is displayed for each monthly exempt employee (with or without salary), affiliate, fellow and graduate student that holds an appointment in the Org Unit. Graduate Student and Faculty summer appointments will include June information from the prior fiscal yer as they did in the legacy report. All other records will include information for the fiscal year July - June.

The report does not include non-paid exempt, confidential exempt, weekly paid non-exempt employees or hourly paid students.

The data displayed is a snapshot of the records in the Org Unit as of the end of each month within a fiscal year.

Changes made to prior periods will only be reflected on future month SANDI reports and will not change the data in snapshots.

For example, if a salary increase is processed in March with an effective date of January 1st, the January and February SANDI reports will not be changed but the new data will be reflected on the March SANDI report.

This is a Data Warehouse report using Tableau, so when you are prompted to log in you need to enter your Data Warehouse user ID and password. (*Note: The user ID for the developer will display when you access the report. You can type right over it*).

New for Fiscal Year 18 (and June 2016) we have added 2 new sections to the SANDI report - Retroactivity and Transfers In.

The Retroactivity section will display changes made to individuals, within the department and month you have selected, for prior periods within the fiscal year. These may be due to an appointment or salary distribution change. This information is reflected in the information contained on the SANDI tab for the individual.

The Transfers In section is focused on salary distribution rather than where the individual holds an appointment. The information is pulled from the DACCA table and can be viewed by Profit Center and/or by Department. With the proper role you can view all salary distribution to cost objects in your profit center(s) regardless of where an individual is appointed and view salary charged to cost objects in your profit center(s) for individuals appointed outside of your department.

Please note that if you select a month prior to June 2017 for Transfers In or Retroactivity you will not see any results.

Roles

To ensure a user can generate the complete report which combines HR and Payroll information, the role “Report on SANDI Data by Org” must be assigned with the proper HR Org Unit or HR Org Unit area qualifier(s) in the Roles database. A user may be assigned this role for multiple Org Units.

To request access if you do not already have this role, contact the HR Primary Authorizer for the Org unit who can assign it directly or authorize business-help@mit.edu to add it to your roles.

The "Report on SANDI by Org" role gives access to the Retroactivity section.

The "Report on SANDI by Profit Center" role gives access to the Transfers In section.

If you select a section for which you do not hold the appropriate role, you will see no results.

Searching

Four search criteria are available in the SANDI and Retroactivity sections: Select Month, Select Department (Org Unit), Select Personnel Subareas and Name Search.

The Transfers In section has Select Month, Select Department, Select Profit Center ID and Full Name as criteria on which you can narrow your search.

To generate the report you must choose options from the Select Month and Select Department drop-down lists. Selections in just those lists will generate a full report.

To narrow down the results for a specific need, you may choose additional search options from the Select Personnel Subareas or Name Search drop-down lists. Please note the personnel subarea is based on individual and not the specific appointment.

You will not get any results if you only select a subarea or name without a month and department.

Data in Report

⚠ Note: Although some columns indicate they can be sorted, based on the format in which the data is presented the icons will not work as expected.

Column Name	**Description**
Name & MIT ID	Employee or Student's full name and MIT ID #
Pay Basis	General work period duration for this appointment (e.g. 9 months, Fall term, Spring term); not applicable to all
Pay Schedule	Dates to which the annual rate/monthly stipend applies within the fiscal year
Supplement	Indicates the type of one-time or ongoing supplemental payment the individual has/will receive
Appt Subtype Code	Code used to distinguish the type of appointment
Job Title	The job title associated with the position on this appointment (this is not necessarily the same as the position title)
Rate for pay period	Annual rate of pay for employee, monthly stipend rate for grad student, one-time or ongoing supplement amount
Estimated Amount to be Paid for period	Calculated amount to be paid for dates under pay schedule based on annual rate, monthly stipend or supplement
Estimated Current Period Pay	Calculated amount paid for the month of this report for this appointment.
Estimated FYTD Pay	Calculated amount paid for the fiscal year of this report including the current period
Percent Effort	Percent of effort on this appointment
Distr Begin Date	Start date for which salary will be distributed to this cost object for this appointment at this percent
Distr End Date	End date for which salary will be distributed to this cost object for this appointment at this percent
Cost Object	Work Breakdown Structure (WBS), Internal Order or Cost Center to which the salary, stipend, fellowship or tuition is distributed
GL	General ledger account to categorize salary, stipend, fellowship and tuition expenses
GL Account Name	Name of the general ledger account for reference
Distr Percent to Cost Object	Percent distributed to this cost object for period of Distr Begin thru Distr End dates
Estimated Amount to be Distr for period	Calculated amount to be distributed to this cost object for period of Distr Begin thru Distr End dates based on annual rate or monthly stipend
Current Period Distribution	Amount distributed to this cost object for the month of this report for this appointment
FYTD Amount Distributed	Amount distributed for the fiscal year of this report to this cost object including the current period for this appointment
Profit Center Name	Name of the profit center for reference
Profit Center ID	Profit Center on the cost object included in the individual's salary distribution and available as search criteria
Department	Department to which the individual is appointed that includes distribution to a cost object within the profit center

Exporting Results

You can export the results of your report to a different format by clicking on Download in the upper right-hand corner of the page.

Click anywhere in the body of the report then select Crosstab which will export the results to Excel. Please note the data will be a download of the underlying information used to generate the report and will not be displayed in the same format you see on the screen.

You can also select PDF instead of Crosstab if you don't wish to download to excel.

Frequently Asked Questions

Q: What is the purpose of this report?
A: The SANDI was developed at the request of the community to reproduce a reference tool that they found useful that had been available from the previous payroll system. This is not required for any central process and can be used in whatever way you wish.

Q: Why are amounts labeled as estimated?
A: Information was stored in the previous payroll system on a fiscal year basis and for each specific appointment. The legacy SANDI reported this data exactly as it was stored in the old system. In SAP, the appointment information is not fiscal year based and the payroll information is not stored for each specific appointment. To create the report with the same format as requested, appointments had to be evaluated to include only a fiscal year piece and payment data had to be manually applied to each appointment.

Q: Why are the distribution current & FYTD amounts not estimated?
A: These amounts are pulled from the Distribution by Account (DACCA) report, which are actually the amounts that were distributed and not calculated.

Q: Why does the current month distribution not match the total I see on the DACCA for an employee?
A: The SANDI report does not include vacation credits applied to a cost object. These amounts will be included in the Retroactivity page which is currently being developed.

Q: Can I get a SANDI report for years prior to FY17?
A: The data is not available for periods before FY17. The information used for the SANDI is a new view developed in the Data Warehouse based on table snapshots taken in anticipation of releasing FY17. We cannot create snapshots for prior periods.

Q: Is this the same as a forecasting report?
A: The information is calculated from appointment information stored in the Data Warehouse for the fiscal year to be used as a reporting tool, not a forecasting tool. Individuals in your Org Unit(s) who hold appointments that extend past FY17 would not have complete data on which to forecast.

Q: Why doesn’t the amount an employee was actually paid match the estimated current period amount on my SANDI report?
A: The payroll and salary distribution are processed at different times in the month. The appointment and DACCA data for the SANDI are being captured after the salary distribution. If an appointment change was made to an individual’s record (i.e., salary change or effort change) between when the payroll was processed and the salary distribution was generated, the information reflected on the SANDI includes the new information but the actual payroll result would not.