

University of Wisconsin System - HRS

How to Run Reports in HRS

4/13/2011



Overview

- HRS Report List
- Report Security
- How to Run A Report!
 - SQR Report
 - Query

Report List

- HRS Report List Available
(<https://uwservice.wisc.edu/docs/publications/hrs-r1-report-list.xlsx>)
- The updated list includes:
 - Which reports will be delivered via Cypress & to which inboxes (Service Center, Campus, etc.)
 - Security roles required to run a specific report
 - Updated and verified report navigation
- This list is available on the intranet, and will also be available on the HRS Professional Portal

Report List

Technical Report Name	Report Title	Report Description	Navigation	Security Roles (IAM)	Cypress Report?	Batch Schedule	Cypress Distribution
PAY001	Vendor Payment Reports (modified - Deduction Register)	Some vendors require specific reporting criteria and attributes	Payroll for North America, Payroll Processing USA, Pay Period Reports, Deduction Register	PY UW/SC Payroll Operations	Y	Will be run after each Pay Confirm. May also be run ad-hoc.	Service Center Campus KnowledgeBuilder for Reprints
PAY002	Payroll Register (modified)	This report will combine all payment data to employees and distribute to the campus/division/department payroll coordinators	Payroll for North America, Payroll Processing USA, Pay Period Reports, Payroll Register	PY UW/SC Payroll Operations	Y	Run after each payroll confirm	Service Center Campus MSN Div/Dept
PAY003	Paycheck Print	Print U/W system checks and PeopleSoft earnings statements (PAY003.SQR). The only modification made to this delivered PeopleSoft report needs to be the sort order because these are physical checks that need to be within some type of a set order for locating. The default sort is company, alpha, but the users want to change this to Business Unit/Dept ID, alpha within	U/W Payroll Reports, PayCheck Print	PY UW/SC Payroll Check Process	N	N/A	N/A

- Technical name / Report Title / Report Description
- Report Navigation in HRS
- What security role do users need to run it
- Will it be in Cypress Y/N
- What Cypress inboxes will it go to
- How frequently will it be run in batch

Report Security

Technical Report Name	Report Title	Report Description	Security Roles (IAM)
BEN733	Base Benefit Consistency Audit Report (UWBNR022)	Identifies entry errors such as EE DOB as less than age 16 etc.	BN Benefits Troubleshooting BN Service Cntr Benefits Upd BN Campus Benefits Update BN Benefits Report Manager

- Report security (who has access to run reports) has been defined by the BPA teams and the HRS Security Team
- Specific Reports may be accessible by one or more Security Roles
- The actual Security Roles required to run a report are identified in the updated Report List (now with IAM Role names)

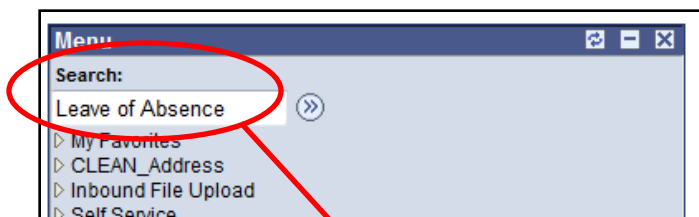
How to Run Reports in HRS

- Quick overview of reports in HRS
 - How to run SQR and Crystal Reports
 - How to run Queries
 - Additional “generic” report training on [Desire2Learn](#), “**Reporting Fundamentals**” course:
 1. Go to Desire2Learn at www.uwsa.edu/d2l
 2. Login with your campus credentials.
 3. Click the Self Registration link in the top left corner.
 4. Choose the course you want to register for (i.e. Reporting Fundamentals).

Running SQR and Crystal Reports

■ Find Your Report

- Use the Navigation information from the Report List
- Use the “Search” option at the top of the PeopleSoft menu to search for a report by name:



Type in your search criteria & click >>

Result has direct link & shows navigation

Search

Enter search keywords separated by a space. Use quotes for any phrases. For example: Cities Countries 'United States'

New Search Search Within Results

Leave of Absence

Find

[Customize Settings](#)

[Search Tips](#)

[Hide Summaries](#)

Search Results

1 [Employees on Leave of Absence](#)

View all employees with a status of Leave with Pay or Leave of Absence.
Home>Workforce Administration>Job Information>Reports>Employees on Leave of Absence

2 [Request Leave of Absence \(USF\)](#)

Request a U.S. Federal Government leave of absence and submit it to your manager for approval.
Home>Self Service>Personal Information>Request Leave of Absence (USF)

3 [Leave of Absence Report](#)

View list of employees that have taken a leave of absence
Home>Benefits>Reports>Leave of Absence Report

4 [Request Termination](#)

Request termination of a U.S. Federal Government position or a leave of absence.
Home>Self Service>Personal Information>Request Termination

Running SQR and Crystal Reports

■ Report “Run Control ID”

- A Run Control ID is the name you assign to parameters for a report
- The Run Control ID save your report parameter settings
- See KB document <http://kb.wisc.edu/hrs/page.php?id=16540> for more info on Run Controls

Menu

- Reports
 - Audits
 - Regulatory and Compliance
 - Contributions and Deductions
 - Participation
 - State Group Life ABBR Report
 - Benefit Contributions Report
 - Mailing Label Report
 - Leave of Absence Report
 - Sick Leave Balance Report
 - Interface with Providers
 - Provide Company Cars
 - Manage Leave Accruals
 - Track FMLA (Family Medical Lv)
 - Monitor Savings Plan Extensions
 - Conduct
 - Nondiscrimination Tsts
 - Administer COBRA Benefits

Leave of Absence Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search by: Run Control ID begins with

Case Sensitive

Search | Advanced Search

Search Results

View All | First | 1-2 of 2 | Last

Run Control ID	Language Code
a	English
mea	English

Find an Existing Value | Add a New Value

- Type in your search criteria & click “Search”.
- Note: Clicking “Search” w/o criteria lists all of your existing Run Control ID’s.
- Select the Run Control ID that you wish to use to run this report.

Running SQR and Crystal Reports

- Some Reports allow you to run by Campus, Division, or Department

UW Probation Report

Run Control ID: mea [Report Manager](#) [Process Monitor](#)

Report Request Parameter(s)

As Of Date: 04/10/2011

Department: L%

(Note: Blank for All Departments)

Enter "L" or "L%" to run report for UW-Stout

- Department is the new term for UDDS
- Enter 1st letter of UDDS to run by Campus (% is optional)

Running SQR and Crystal Reports

- By Division

UW Probation Report

Run Control ID: mea [Report Manager](#) [Process Monitor](#)

Report Request Parameter(s)

As Of Date: 04/10/2011

Department: A40

(Note: Blank for All Departments)

Enter "A40" or "A40%" to run report for UW-Madison, Nelson Institute for Environmental Studies

- Enter 1st 3 letters of UDDS to run by Division (% is optional)

Running SQR and Crystal Reports


- By Department


Click "Run" to run report – takes you to "Output Options" screen

UW Probation Report

Run Control ID: mea [Report Manager](#) [Process Monitor](#) **Run**

Report Request Parameter(s)

As Of Date: 04/10/2011 

Department: A403400 

(Note: Blank for All Departments)


Click on Calendar Icon to display pop-up calendars, Magnifying Glass Icon to display search screen for report parameter values

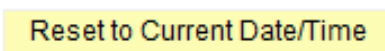
- Enter entire UDDS to run by Department
- Enter other report parameters as needed
- Click "**Run**" to create report using current parameters


Running SQR and Crystal Reports

Process Scheduler Request

User ID: MEANDERSON23 Run Control ID: mea

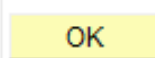
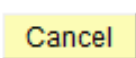
Server Name: PSUNX Run Date: 04/11/2011 

Recurrence: Run Time: 10:28:33PM 

Time Zone: 

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Probation Report	UWHRR012	SQR Report	Web	PDF	Distribution

■ Server Name

- Blank or PSUNX, both work for Process Type of “SQR Report”
- Change Server Name to PSNT for Process Type of “Crystal Report” (VERY few reports)

Running a Report - Output Options

Process Scheduler Request

User ID: MEANDERSON23 Run Control ID: mea

Server Name: PSUNX Run Date: 04/11/2011

Recurrence: Run Time: 10:28:33PM

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Probation Report	UWHRR012	SQR Report	Web	PDF	Distribution

OK

Cancel

Click "OK" to run report

- Use the standard Output Options:
 - Type – **Web**
 - Format – **PDF**
- This will generate a PDF file for the report output

Running a Report - Report Processing

- By Department

UW Probation Report

Run Control ID: mea

[Report Manager](#) [Process Monitor](#)

Click Here to go to the Process Monitor

Report Request Parameter(s)

As Of Date: 04/10/2011

Department: A40

(Note: Blank for All Departments)

- **Process Monitor** link shows report job progress & results
- **Report Manager** link – *don't use it (not very useful)*

Running a Report - Process Monitor

The screenshot displays the 'Process Monitor' interface. On the left is a 'Menu' with various options including 'Time and Labor', 'Payroll for North America', and 'UW Benefits Reports'. The main area is titled 'Process List' and 'Server List'. It features a 'View Process Request For' section with search filters for User ID (MEANDERSOI), Type, Last (1 Days), Server, Name (UWBNR022), Instance, Run Status, and Distribution Status. A 'Refresh' button is present. Below this is a table with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains two rows of SQR Report data.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	24159		SQR Report	UWBNR022	MEANDERSON23	04/11/2011 9:03:50PM CDT	Queued	N/A	Details
<input type="checkbox"/>	24114		SQR Report	UWBNR022	MEANDERSON23	04/11/2011 1:20:18PM CDT	Success	Posted	Details

- Displays SQR and Crystal Report Status & Output
- Available from ANY report's run control page
- Or Available via menu at **PeopleTools > Process Scheduler > Process Monitor**

Running a Report - Report Processing

Process List **Server List**

View Process Request For

User ID: MEANDERSOI Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | [First](#) 1-6 of 6 [Last](#)

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	24209		SQR Report	UWHRR012	MEANDERSON23	04/12/2011 11:46:40AM CDT	Processing	N/A	Details
<input type="checkbox"/>	24207		SQR Report	UWHRR012	MEANDERSON23	04/12/2011 11:45:41AM CDT	Success	Posted	Details

■ Run Status

- **Queued > Initiated > Processing > then either ...**
 - **Success** – Report Ran to Success
 - **Error** – Report Encountered an Error

Running a Report - Report Processing

Process List **Server List**

View Process Request For

User ID: MEANDERSOI Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | [First](#) 1-6 of 6 [Last](#)

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	24209		SQR Report	UWHRR012	MEANDERSON23	04/12/2011 11:46:40AM CDT	Processing	N/A	Details
<input type="checkbox"/>	24207		SQR Report	UWHRR012	MEANDERSON23	04/12/2011 11:45:41AM CDT	Success	Posted	Details

■ Distribution Status

- Once the Distribution Status changes from N/A -> Posting -> **Posted**, you can get the to report from the “**Details**” link

Click Here to go to the Process Detail screen

Running a Report - Report Results

Process Detail

Process			
Instance:	24207	Type:	SQR Report
Name:	UWHRR012	Description:	Probation Report
Run Status:	Success	Distribution Status:	Posted

Run	Update Process
Run Control ID: mea	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSUNX	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 04/12/2011 11:45:51AM CDT	Parameters Transfer
Run Anytime After: 04/12/2011 11:45:41AM CDT	Message Log
Began Process At: 04/12/2011 11:46:17AM CDT	Batch Timings
Ended Process At: 04/12/2011 11:46:31AM CDT	View Log/Trace

OK Cancel

Click Here to go to the View Log/Trace screen (report output)

- Click the **View Log/Trace** link to get to the report output
- **DO NOT**
 - Delete Request
 - Cancel Request
 - (unless instructed by SCCC)

Running a Report - Report Results

View Log/Trace

Report

Report ID: 18313 Process Instance: 24207 [Message Log](#)
Name: UWHR012 Process Type: SQR Report
Run Status: Success

Probation Report

Distribution Details

Distribution Node: HRTST_RPTNOD Expiration Date: 04/19/2011

File List

Name	File Size (bytes)	Datetime Created
SQR UWHR012_24207.log	1,729	04/12/2011 11:46:31.000000AM CDT
uwhr012_24207.PDF	1,506	04/12/2011 11:46:31.000000AM CDT
uwhr012_24207.out	911	04/12/2011 11:46:31.000000AM CDT

Distribute To

Distribution ID Type	*Distribution ID
User	MEANDERSON23

Return

- If no PDF exists, then no data was found for your report criteria
- When you click on the PDF link, the report will be displayed in a new window

Click Here to view to the report output

Running a Query – Query Viewer

The screenshot displays the 'Query Viewer' interface. On the left is a 'Menu' with a tree structure including 'Reporting Tools' > 'Query'. The main area shows a search filter set to 'Query Name' with the value 'UW_HR'. Below the search bar is a 'Search Results' section with a 'Folder View' dropdown set to '-- All Folders --'. A table lists the search results with columns for Query Name, Description, Owner, Folder, Run to HTML, Run to Excel, Schedule, and Add to Favorites.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
UW_HR_674_MACSDR	Missing Adj Cont Svc Dt Report	Public		HTML	Excel	Schedule	Favorite
UW_HR_839_FTEMR	FTE Monitoring Report	Public		HTML	Excel	Schedule	Favorite
UW_HR_849_NJL_SEN	New Job List	Public		HTML	Excel	Schedule	Favorite

- Queries only – Output to HTML or Excel file
- Available at **Reporting Tools > Query > Query Viewer**
- Data not stored, users must save output to HTML or Excel file
- More on the Query Viewer later...

Running a Query – Query Viewer

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: Query Name UW_HR

Search

[Advanced Search](#)

Enter the first letters of the query name and click “Search”

Most queries start with “UW_”

Search Results





*Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
UW_HR_525_AIL	Active Inactive Position List	Public		HTML	Excel	Schedule	Favorite
UW_HR_674_MACSDR	Missing Adj Cont Svc Dt Report	Public		HTML	Excel	Schedule	Favorite

- Search for the query you wish to run
- Select “HTML” to see output in your web browser
- Select “Excel” to output results to a spreadsheet
- We’ll select “Excel” for “UW_HR_525_AIL” ...

Query Results

UW_HR_525_AIL - Active Inactive Position List

As Of Date: 04/05/2011 
DeptID: B% 
Empl Class: CJ 
Job Code: % 
Position Status: %

Click on Calendar Icon to display pop-up calendars, Magnifying Glass Icon to display search screen for report parameter values

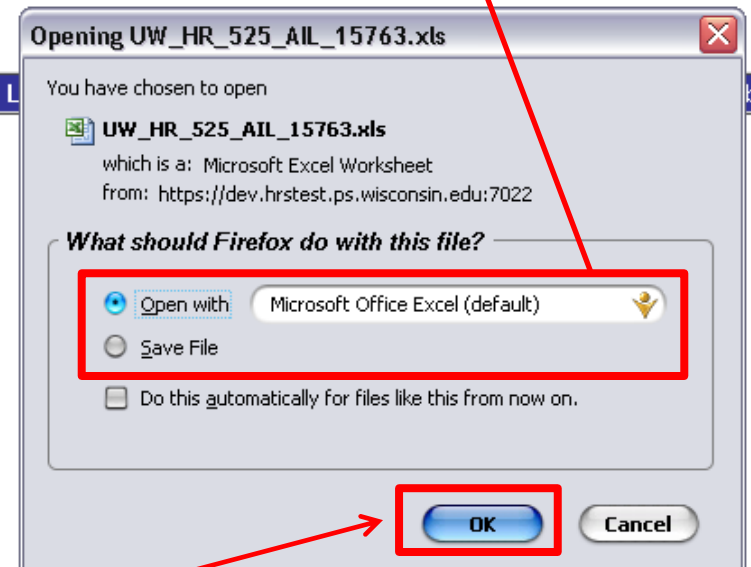
View Results

Click "View Results" to run query

You can "Open" the spreadsheet file in Excel or "Save" it to your hard drive

Department	Empl Class	Job Code	Position	Eff Date	Description	Reports To	Co L
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- Enter 1st letter of UDDS to run by Campus or 1st 3 letters of UDDS to run by Division
- NOTE: % is NOT optional when entering Partial UDDS for queries
- Enter other parameters as needed
- Click "View Results" to create report
- To open resulting spreadsheet, click "OK" on popup screen, opens in Excel



Query Results

Active Inactiv	69													
Department	Empl Class	Job Code	Position	Eff Date	Description	Reports To	Co	Location	Max Head Cn	Reg/Temp	Full/Part	Std Hrs/Wk	Job Share	
B010200	CJ	08500	01422428	8/22/2010	UNIV SVC PRG ASSOC		UW	BUWMIL	1	R	F	40.00	N	
B020130	CJ	13402	01304522	8/22/2010	IS COMP SERV SEN		UW	B1931	1	R	F	40.00	N	
B021025	CJ	00160	01233335	8/22/2010	ACCOUNTANT		UW	B1931	1	R	F	40.00	N	
B021026	CJ	13663	01357340	8/22/2010	IS BUS AUTO SPEC		UW	B1931	1	R	F	24.00	N	
B021026	CJ	21303	01359716	8/22/2010	PAY & BEN SPEC 3		UW	B1931	1	R	F	40.00	N	
B030200	CJ	76120	01427491	8/22/2010	BLDGS/GROUNDS SUPT		UW	B1937	1	R	F	20.00	N	
B032400	CJ	21303	01368348	8/22/2010	PAY & BEN SPEC 3		UW	B1980	1	R	F	40.00	N	
B054010	CJ	10802	01466007	8/29/2010	HR SPECIALIST		UW	B1931	1	R	F	40.00	N	
B054010	CJ	13403	01456785	8/22/2010	IS COMP SERV SPEC		UW	B1931	1	R	F	40.00	N	
B054010	CJ	13663	01409773	8/22/2010	IS BUS AUTO SPEC		UW	B1931	1	R	F	24.00	N	
B054010	CJ	19410	01466392	8/30/2010	HR ASST		UW	B1931	1	R	F	30.00	N	
R054010	CJ	19410	01472660	9/8/2010	HR ASST		UW	B1931	1	R	F	30.00	N	

- Sample Excel file from query output

The End