PEOPLESOFT HCM REPORTS & QUERIES

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Overview

This user guide includes information on reports and queries for collecting data from the PeopleSoft Human Resources. It does not discuss how to run reports and queries. Consult the General Information on Running Reports and Queries (PDF) guide for specific information on how to run reports and queries.

This document covers information on the essential HR Reports and Queries. A complete list of available queries and reports can be found in the document: Available Reports and Queries (PDF).

Security

All data in PeopleSoft HR is filtered through individual security permissions. These permissions control access to menu options as well as data. Reports, queries and searches are all limited to data attached to particular departments. For example, if a student has two jobs, one in Chemistry and one in Biology, the student's Chemistry record can only be seen by the Chemistry supervisor and vice versa.

Extracting Information Using Reports

Most of the reports in HR are custom reports and have been developed with input from UVM staff. In order to run reports, it is necessary to set up a run control id. If unsure on how to set up a run control id, consult the General Information on Running Reports and Queries (PDF) guide for help.

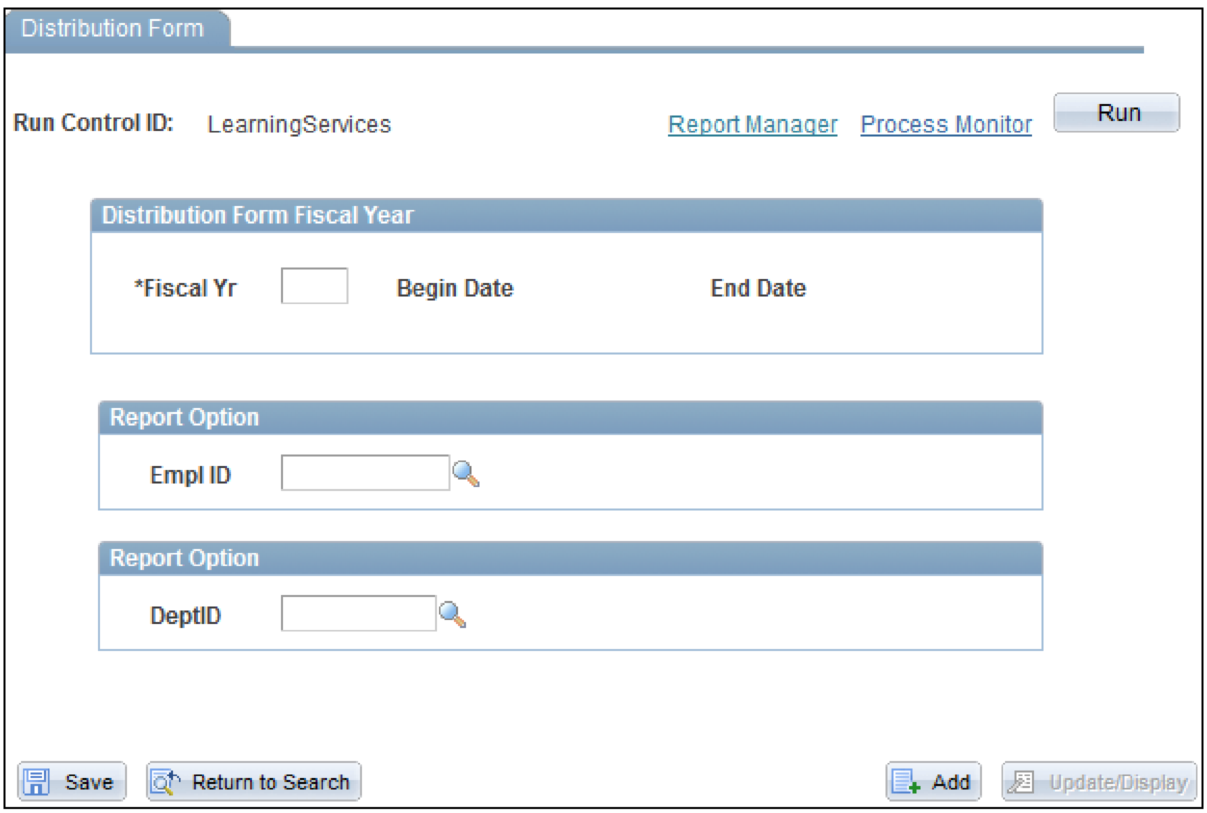
Commonly Used Reports

Distribution Form

The distribution form is used for processing changes to an existing distribution.

Step-by-Step Instructions: Creating a Distribution Form

1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal).
2. Navigation: **UVM Reports > Commitment Accounting > Distribution Form**
3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. If unsure on how to set up a Run Control ID, consult the General Information on Running Reports and Queries (PDF) guide for help.
4. Click **Search.**
5. The criteria entry screen will appear. There are several ways to run this report. It is possible to run this report by single employee or by department. Choosing department will bring back a distribution form for each employee in the department.



6. Click the **Save** button, and then click the **Run** button.
7. The process scheduler request screen will open. Click **OK**.
8. This previous screen will appear. Click the **Process Monitor** link in the upper right corner of the screen. If unsure on how to use the process monitor, consult the General information on Running Reports and Queries (PDF) guide for help.

Blank Distribution Form

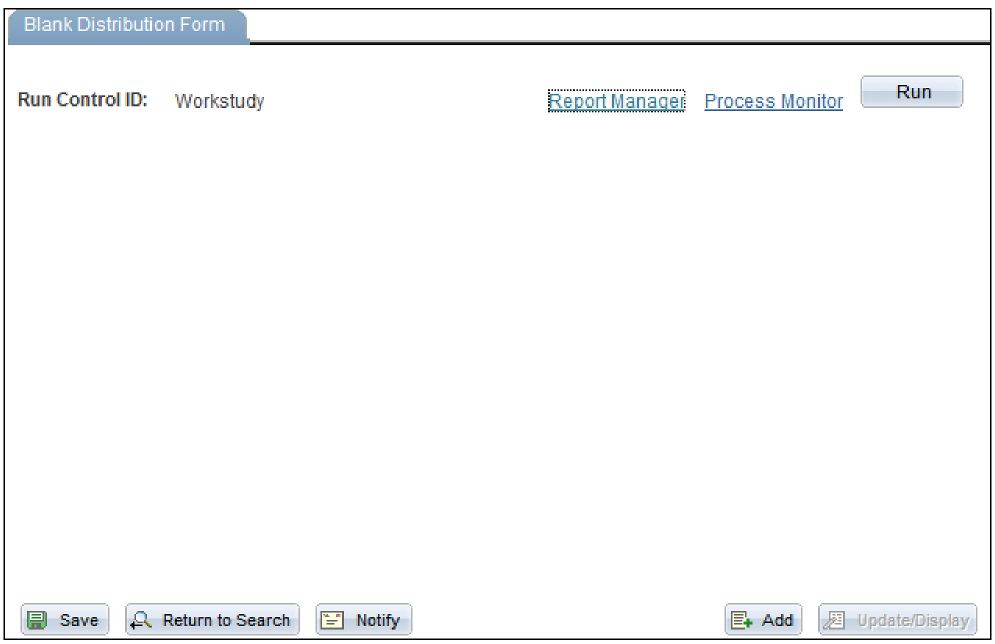
- This is the form used for processing distribution for new hires
- Produces a blank sheet for the distribution form

Step-by-Step Instructions: Creating a Blank Distribution Form

1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal).
2. Navigation: **UVM Reports > Commitment Accounting > Blank Distribution Form**
3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. If unsure on how to set up a run control id, consult the General information on Running Reports and Queries (PDF) guide for help.

Click **Search.**

4. The **Blank Distribution Form** page will open.



5. Click the **Run** button.
6. The process scheduler request screen will open. Click **OK**.
7. The previous screen will appear. Click the **Process Monitor** link in the upper right corner of the screen. If unsure of how to use the process monitor, consult the General information on Running Reports and Queries guide for help.

Labor Distribution Report (Summary and Detail)

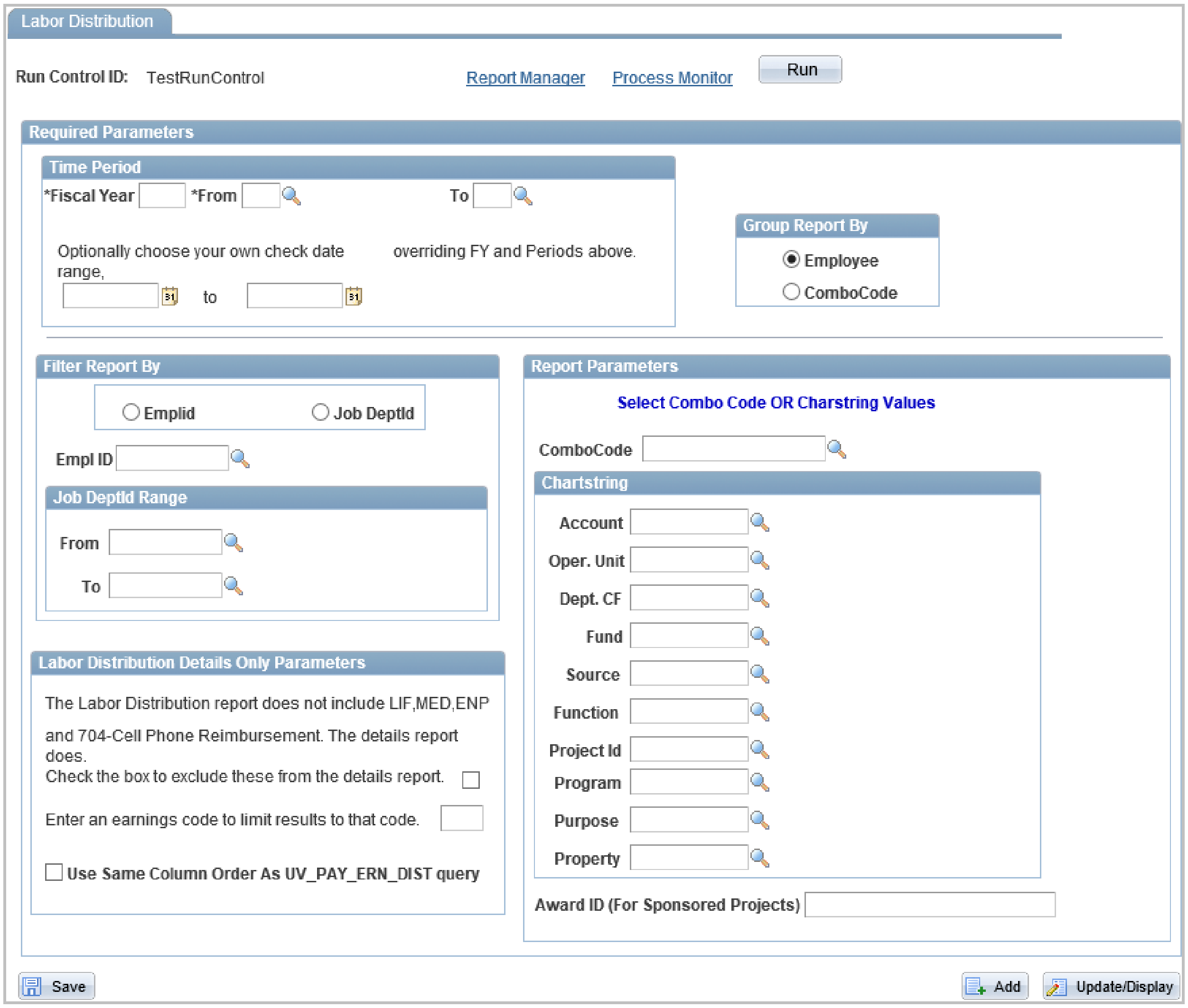
- Look up distribution for a department or a person
- Also useful for researching salary paid against a chartstring
- Employee name, empl record #, combo code, chartstring, amount of salary and fringe charged to combo code.
- Excel output is produced for both reports; only the Summary report produces a PDF.

Step-by-Step Instructions: Running the Labor Distribution Report

1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal).
2. Navigation: **UVM Reports > Commitment Accounting > Labor Distribution**
3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. If unsure of how to set up a run control id, consult the General information on Running Reports and Queries guide for help.
4. Click **Search.**
5. The criteria entry screen will appear.
6. Select a time period, either an accounting period range within a fiscal year or a specific date range, which may cross fiscal years.
7. There are multiple options for running this report. Review the options and enter the appropriate criteria into the report screen.
    - By combo code or chartstring
    - By employee
    - By department
    - For a sponsored award ID, if you wish to report at once on multiple projects that are associated with one award.

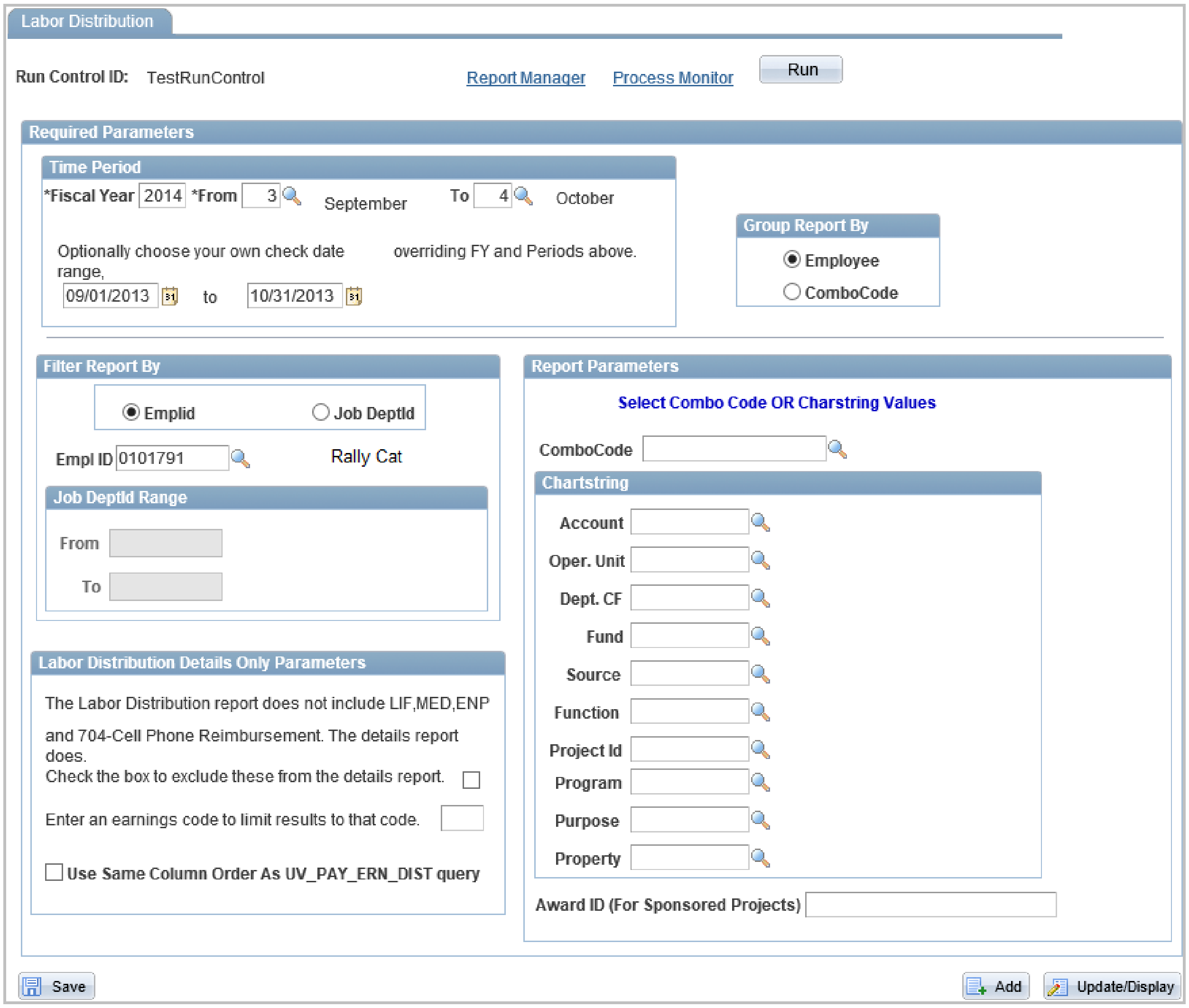
Running the Labor Distribution Report by Combo Code or Chartstring or Award:

- Receive a report of the people paid on that chartstring within a specific time period. This is useful for researching individual salary amounts or individual employees included in a particular budget number within Financial Reports.
- Enter an Award ID to have the results show all projects that go with the award.



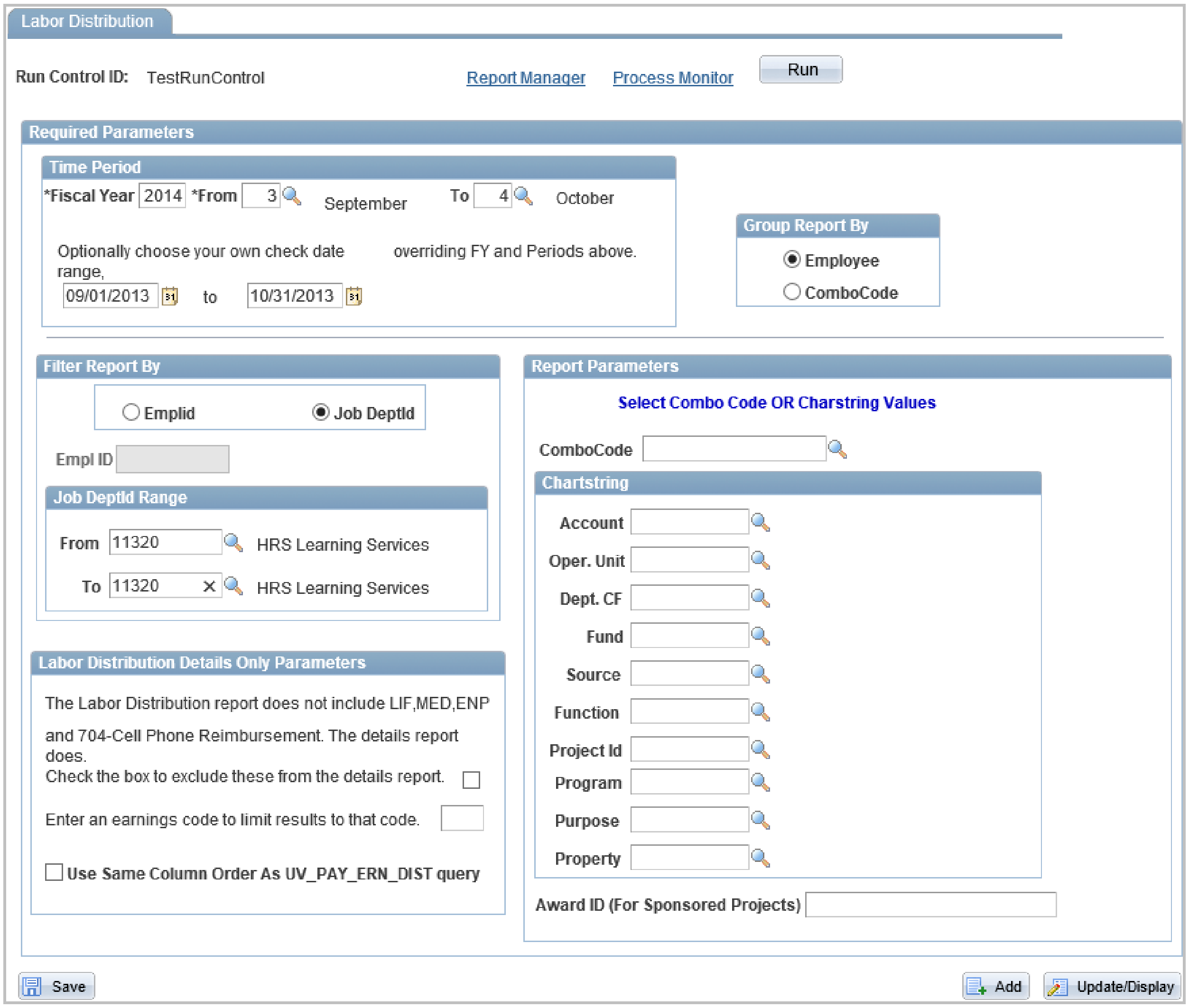
Running the Labor Distribution Report by Employee

- Bring back the chartstring or strings that a particular employee was paid with during the requested time period. This is useful in determining what chartstring to credit if an employee was incorrectly paid.



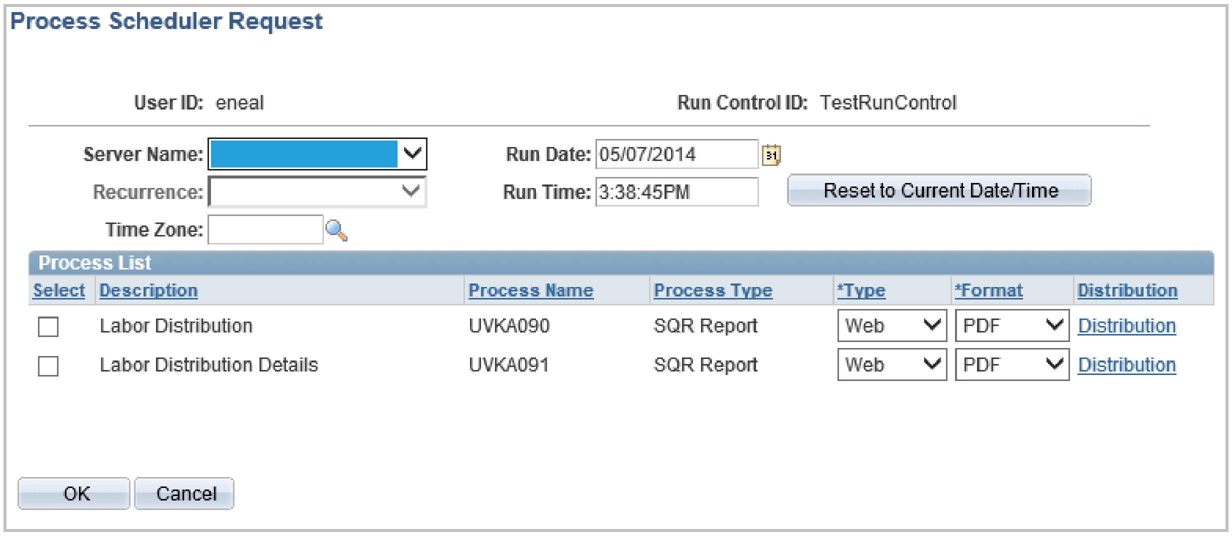
Running the Labor Distribution Report by Department

- Bring back the chartstring information for each employee in the department during the time period requested. Choose to group the output by combo code or employee.



8. Click the **Save** button, and then click the **Run** button.

9. In the **Process Scheduler Request** screen that opens, select either **Labor Distribution** to receive a summary report, or **Labor Distribution Details** to receive a detailed report.



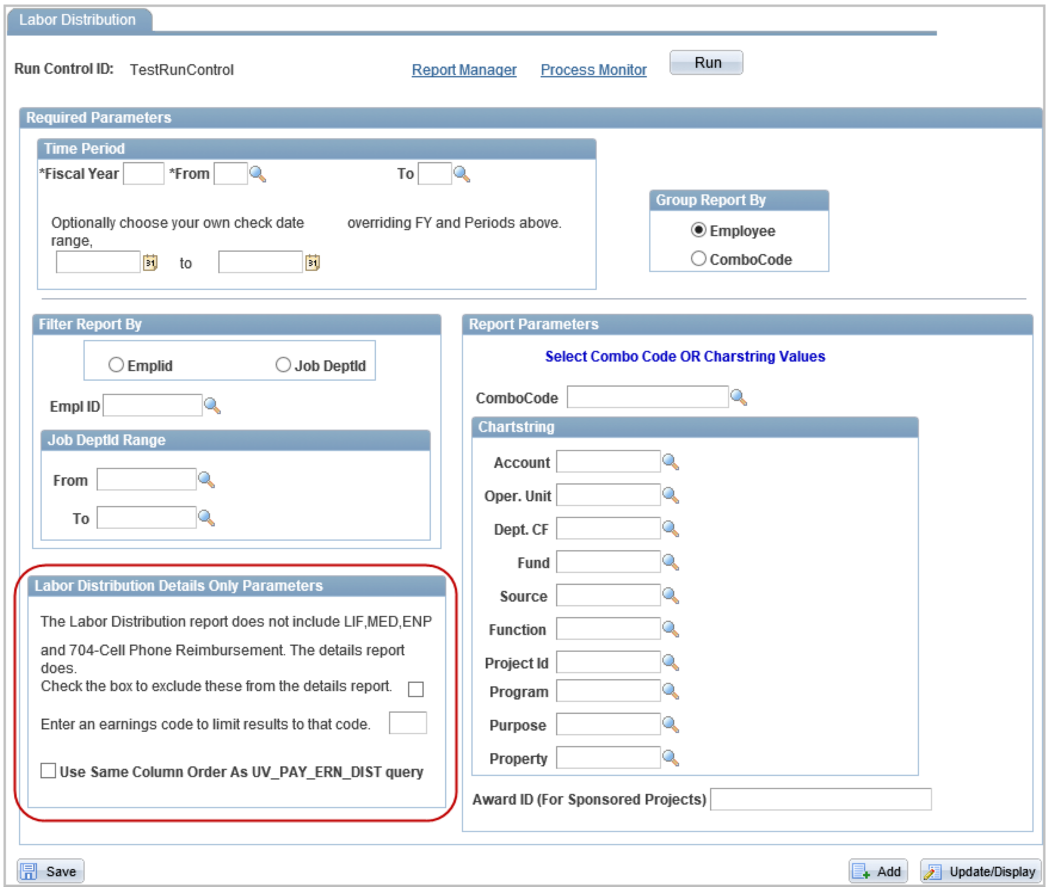
<u>Note</u>: Do not change the **Format**. It will default to **PDF**, but will automatically product both PDF and Excel reports.

10. Click **OK**.

11. The previous screen will appear. Click the **Process Monitor** link in the upper right corner of the screen. If unsure on how to use the process monitor, consult the General information on Running Reports and Queries guide for help.

Labor Distribution Details Only Parameters

New options are available in the **Labor Distribution Details Only Parameter** section of the report criteria screen.



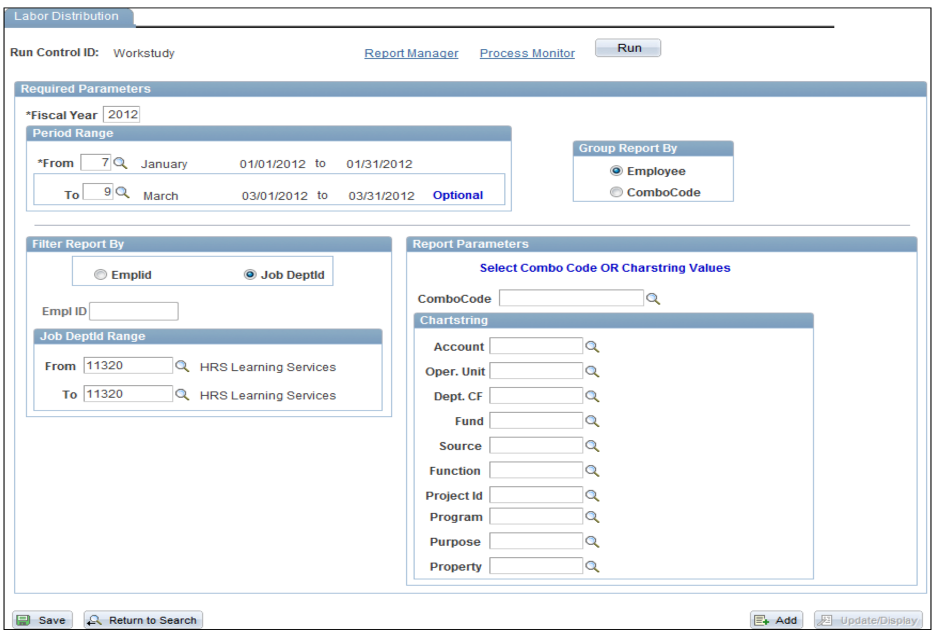
- Note that the **Labor Distribution Details** report includes the earnings codes for LIF, MED, ENP (Earnings not Paid), and 704-Cell Phone Reimbursement. To exclude these codes from being included in the report, click in the check-box to select it. The **Labor Distribution** report does not include these codes as they are not considered compensation. If you wish the two reports to tie out, check the box to exclude these four earning codes from the Labor Distribution Details report.
- The **Labor Distribution Details** report can run for just one particular earnings code if appropriate. This option applies only to the **Labor Distribution Details** report and not to the **Labor Distribution** report.
- The report output is in the same order as the PAY_ERN_DIST query, although the report has even more fields at the far right of the Excel file. There is also additional ordering criteria - the sort order is: NAME, EMPLID, PAY_END_DT, EMPL_RCD, EARNS_END_DT, JOBCODE, ACCT_CD. The query order is by NAME and PAY_END_DT.

Use the Labor Distribution Report to Understand Departmental Suspense

- Use these instructions to tailor the Labor Distribution Report to determine who has been charged to the departmental suspense chartstring.
- The report may be sorted either by combo code or by individual.

Step-by-Step Instructions: Using the Labor Distribution Report to Understand Departmental Suspense

1. Follow Steps 1-7 for creating a Labor Distribution Report.
2. Enter a **Fiscal Year** and a **Period Range** in the appropriate fields.
3. Choose whether to group the information by **combo code** or by **employee** by selecting the appropriate radio button.
4. Under **Filter Report By**, choose **Job DeptId.**



5. Enter the department number in the **Job DeptId Range** fields.
6. In the Chartstring box in the lower right corner of the screen, enter **0010** in the Purpose field.
7. Click the **Save** button, and then click the **Run** button.
8. The process scheduler request screen will open. Click **OK**.
9. The previous screen will appear. Click the **Process Monitor** link in the upper right corner of the screen. If unsure on how to use the process monitor, consult the General information on Running Reports and Queries guide for help.

Work Study Award Report

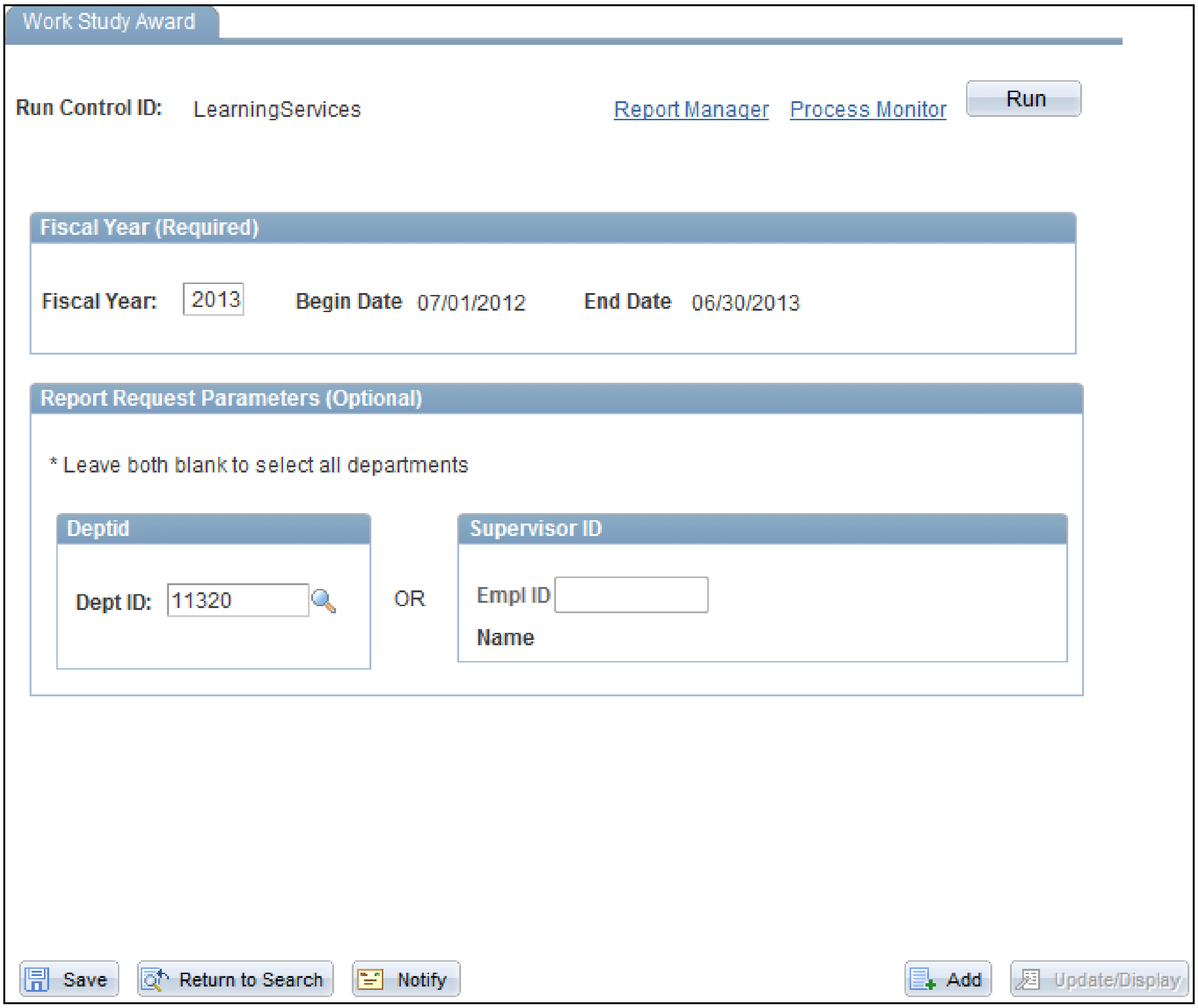
- This report will show the amount of the total award spent by student
- The information on this report is reflects the amount of hours that were paid the last payroll . Any time not already paid will not be included in the report results.
- The totals in this report will accurately reflect amounts earned in work study job across departments, but it will not break the totals out by job.

Step-by-Step Instructions: Running the Work Study Award Report

1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal).
2. Navigation: **UVM Reports > Payroll Reports > Work Study Award**
3. Here a prompt will ask to run a control id. Enter an existing Run control Id or create a new one. If unsure on how to set up a run control id, consult the General information on Running Reports and Queries guide for help.
4. Click **Search**.
5. A report will appear where criteria will need to be entered. There are several ways to run this report.
   - Run the report by supervisor. Choosing this option will bring back one line for every student assigned to a particular supervisor.
   - Run the report by department. Choosing this option will bring back one line per student.

Run the report by department:

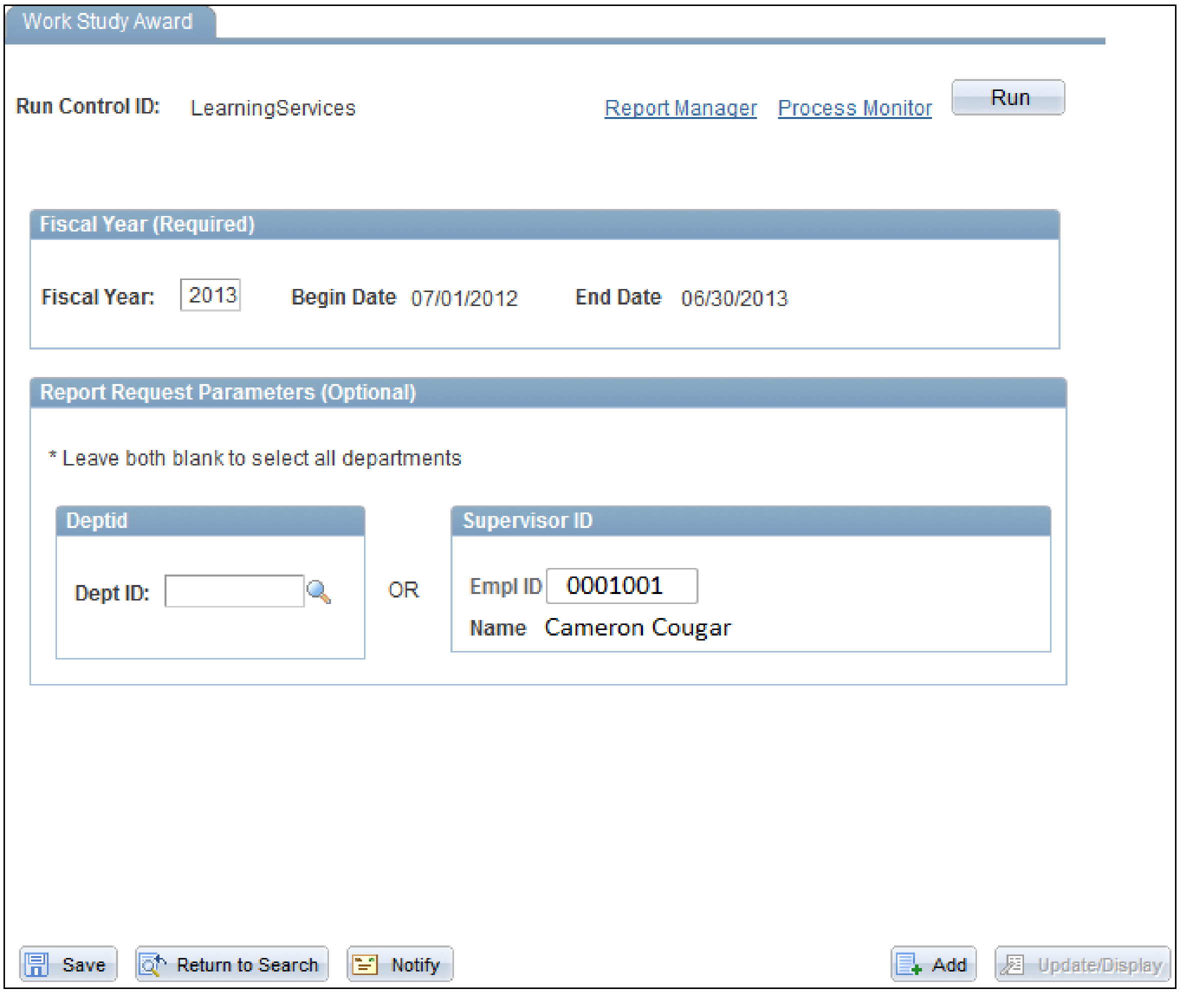
When the report is run by DeptID it will bring back all of the work study students assigned to a particular department.



Run the report by supervisor:

If the report is run by Supervisor ID it will bring back the work-study students directly assigned to that supervisor.

Note that the EmplID referred to here is the EmplID of the Supervisor (Supervisor ID) and not the Employee ID of the student.



6. Enter the appropriate criteria and then click **Run**.
7. The process scheduler request screen will open. Click **OK**.
8. The previous screen will appear. Click the **Process Monitor** link in the upper right corner of the screen. If unsure on how to use the process monitor, consult the [General information on Running Reports and Queries] guide for help.

The Time Card Report

The Time Card Report lists all Reported Time and Payable Time for the specified employee. The report also has a signature line for the employee and the supervisor which can be used for verification purposes if needed.

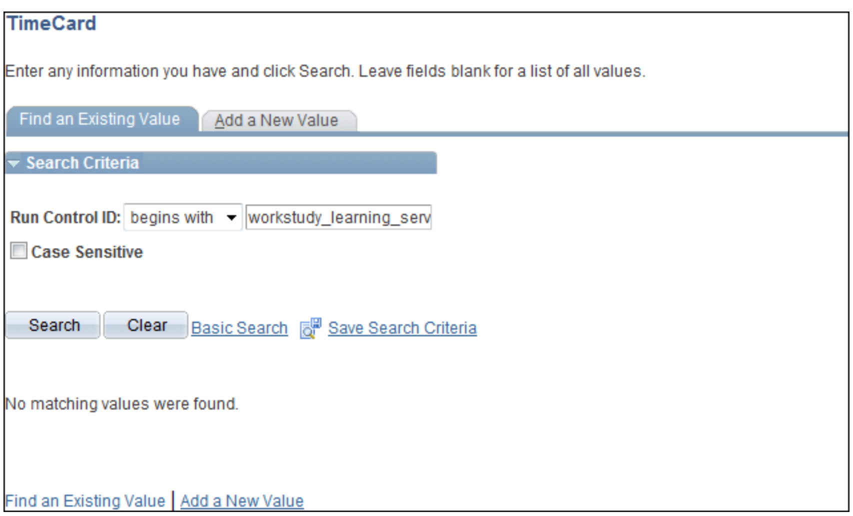
Step-by-Step Instructions: Setting up a Run Control ID for the Time Card Report

Note:

- This is a preliminary step that must be completed before the "Time Card Report" is run. Once this series of steps is completed, the Time Card can be run as often as desired with this Run Control ID without redoing these steps.
- If the information changes and employees need to be added or deleted, changes can be made in this run control. A new Run Control ID does not need to be created.

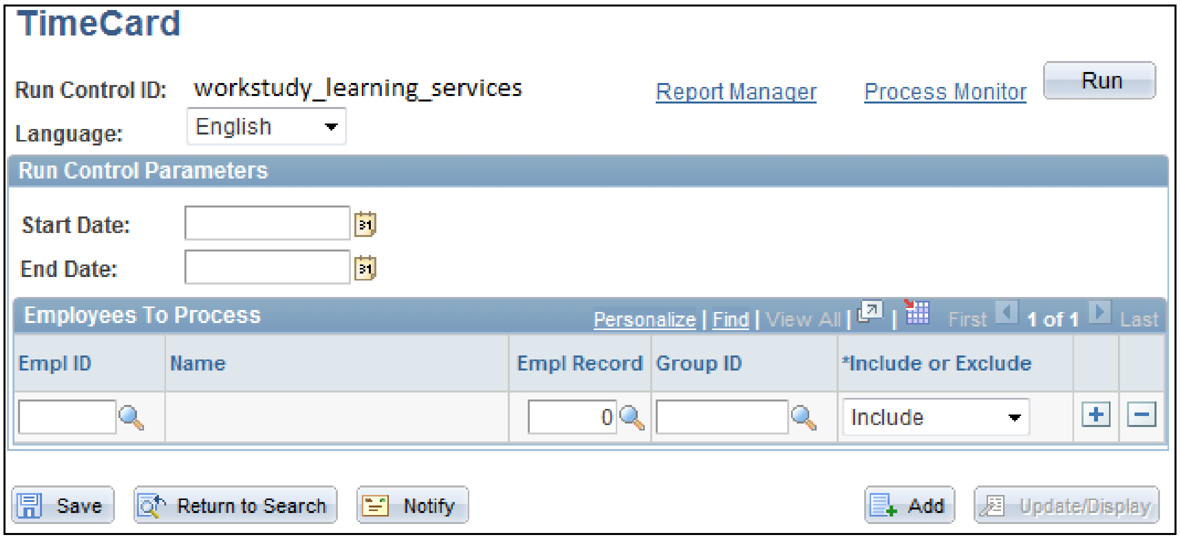
1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal).
2. Navigation: **Time and Labor > Reports > Time Card**
3. Select a name for the **Run Control ID**.

   Note: Choose a title that makes sense and that can be remembered. In the example, type of employee and supervisor last name are used. Run Control IDs are reusable each year, so try not to use specific dates or Fiscal years (e.g. workstudy__learning_services).
4. Enter the chosen Run Control into the search field. Click search to ensure that a Run Control ID with the same name does not exist.

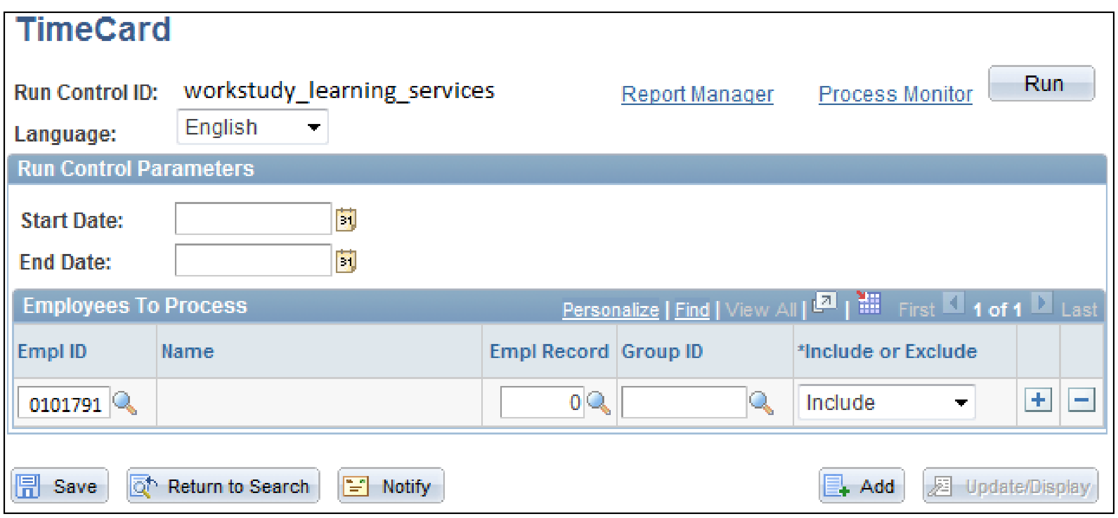


   If the run control chosen is not a duplicate, the "No Matching Values were found" message will appear. If a duplicate value exists, the "Time Card Report" screen will appear and need to step 4 will have to be repeated to choose a new Run Control ID.

5. Click the **Add a New Value** tab. It will automatically populate the **Run Control ID**.
6. Click the **Add** button.
7. The **Time Card Report** screen will appear.

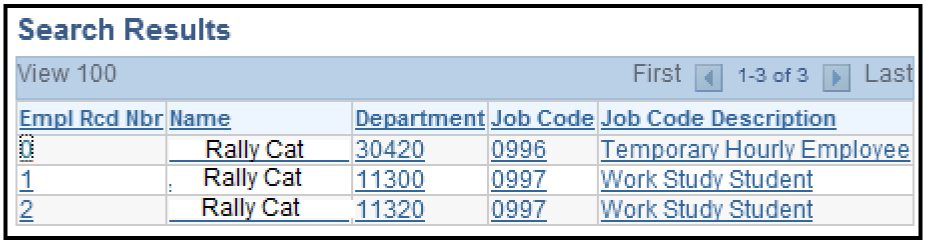


8. Click in the **EMPLID** field and type the **EMPLID** of first employee
9. The ID number of the employee will show in the **EMPL ID** field. Hit **TAB**. (Hint: the table behind the employee id takes forever to load. Clicking the spyglass next to this field will cause the system to time out. The same information can be rendered by following the procedure outlined in the next step.)

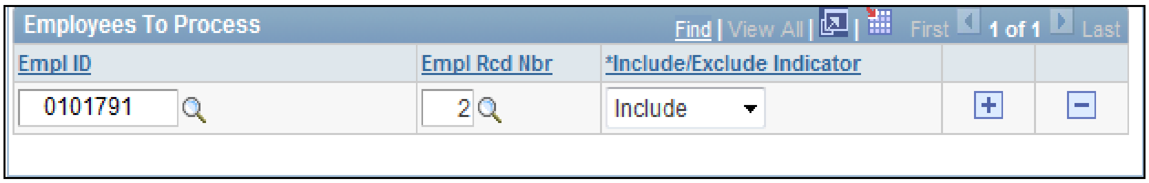


10. Choose the job to report on by checking the spy glass next to the **Empl Rcd Nbr** field.

11. Select the appropriate record by clicking on the hyperlink.



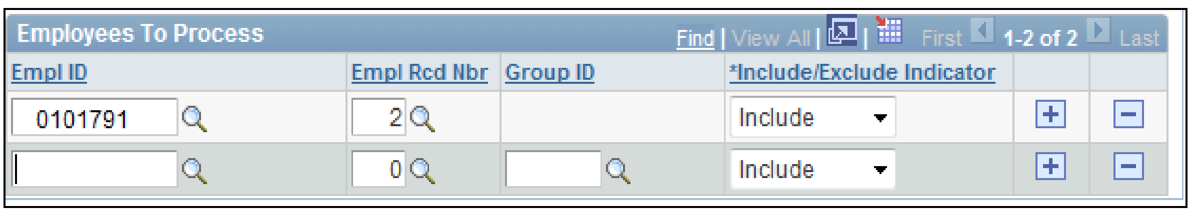
12. The record number will show in the **Empl Rcd Nbr** Field



13. Click the plus sign to add another employee.

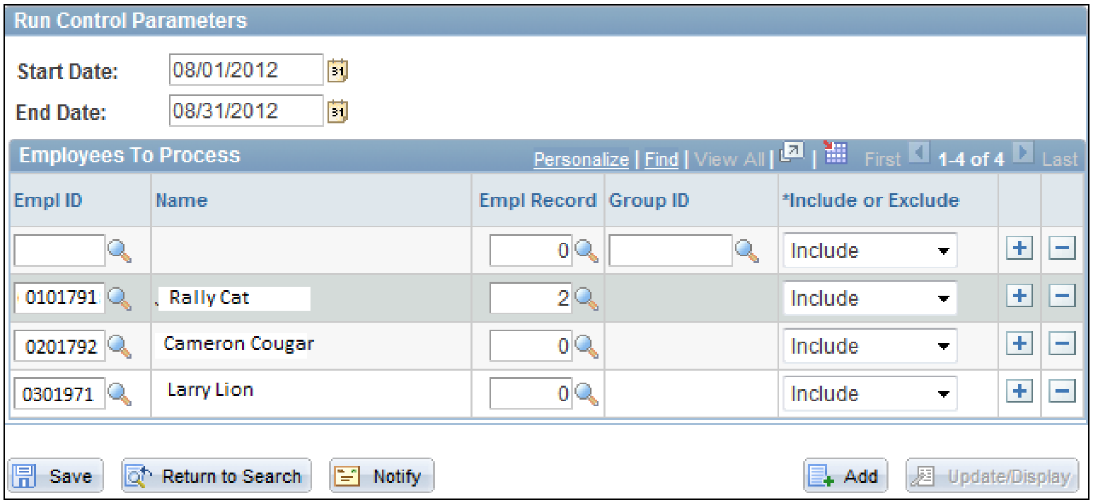
Note: To remove this employee in the future, simply click the negative sign to remove the line.

14. A new line will appear.



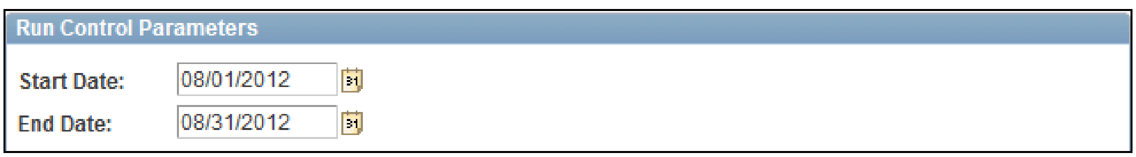
15. Repeat steps 10-16 until all of the employees being reported on have been entered.

16. After the 5th employee has been added, the screen will begin to collapse the lines.



17. To view all lines click the **View All** link at the top of the employees list and all of the employees will be displayed.

18. When finished entering all of the employees, enter date parameters for the report.



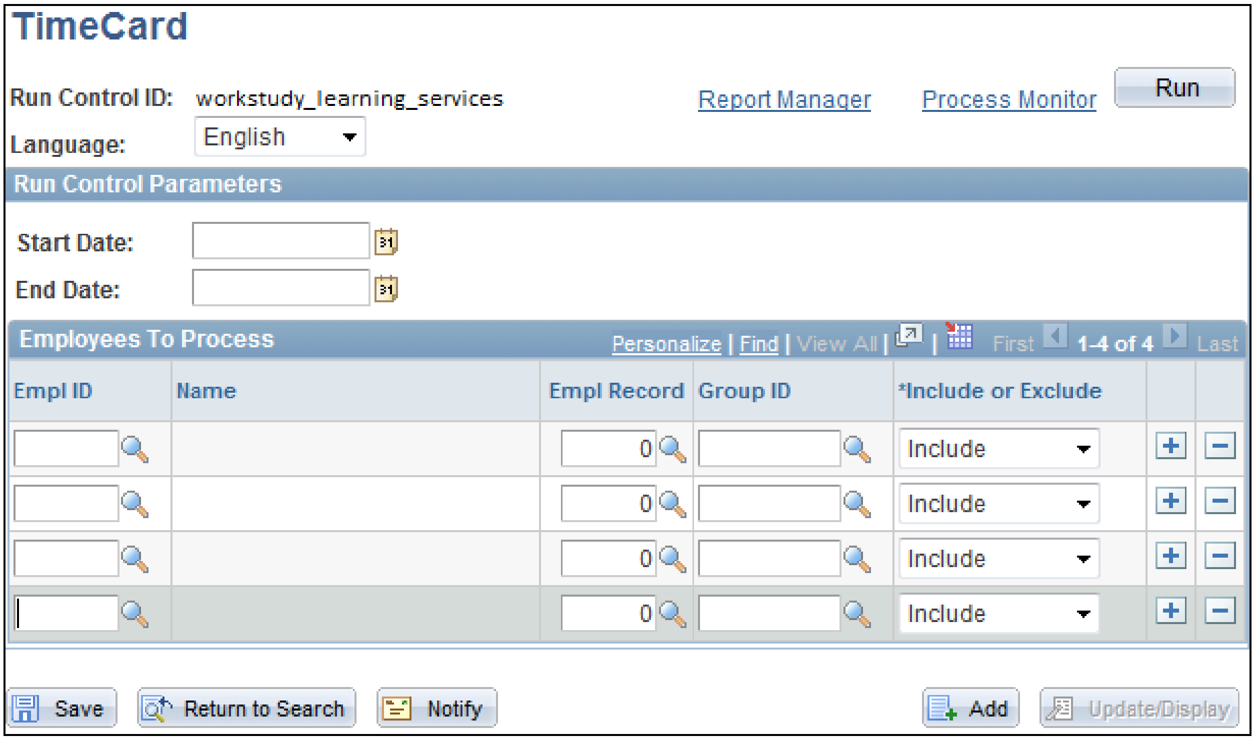
19. When finished entering dates, click the **Save** button.

Step-by-Step Instructions: Processing the Time Card Report

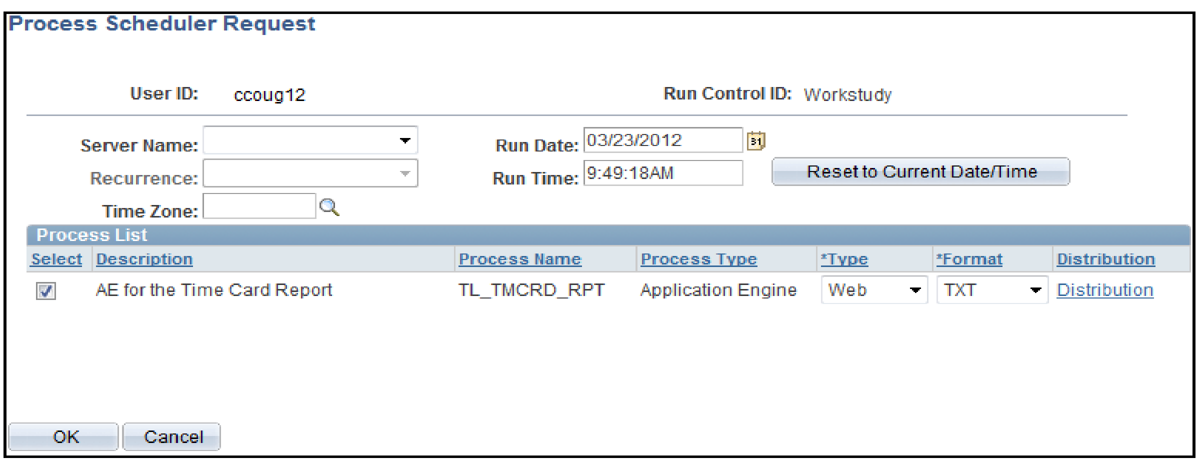
1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal).
2. Navigation: **Time and Labor > Reports > Time Card**
3. Enter the **Run Control ID** created in the steps above and click search to bring up the Time Card Report Screen.

4. The **Time Card** report screen will appear with the last dates saved in the date fields.

   Note: Be sure that **Include** is visible next to all employees.

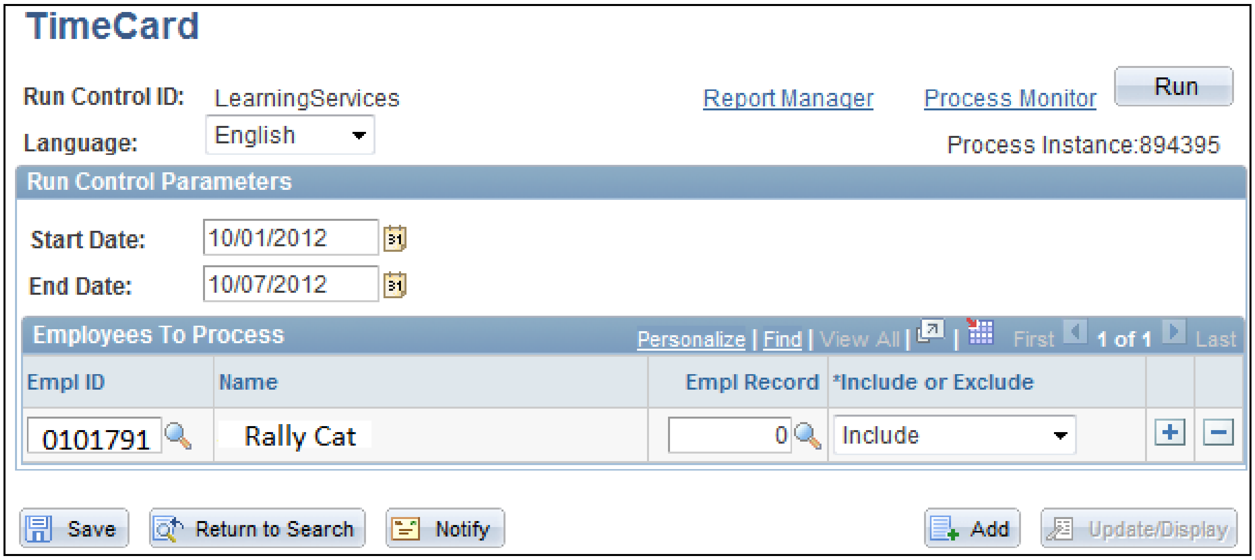


5. Enter new date parameters for the report.
6. When finished entering dates, click the **Run** button.
7. The **Process Scheduler Request** will appear.



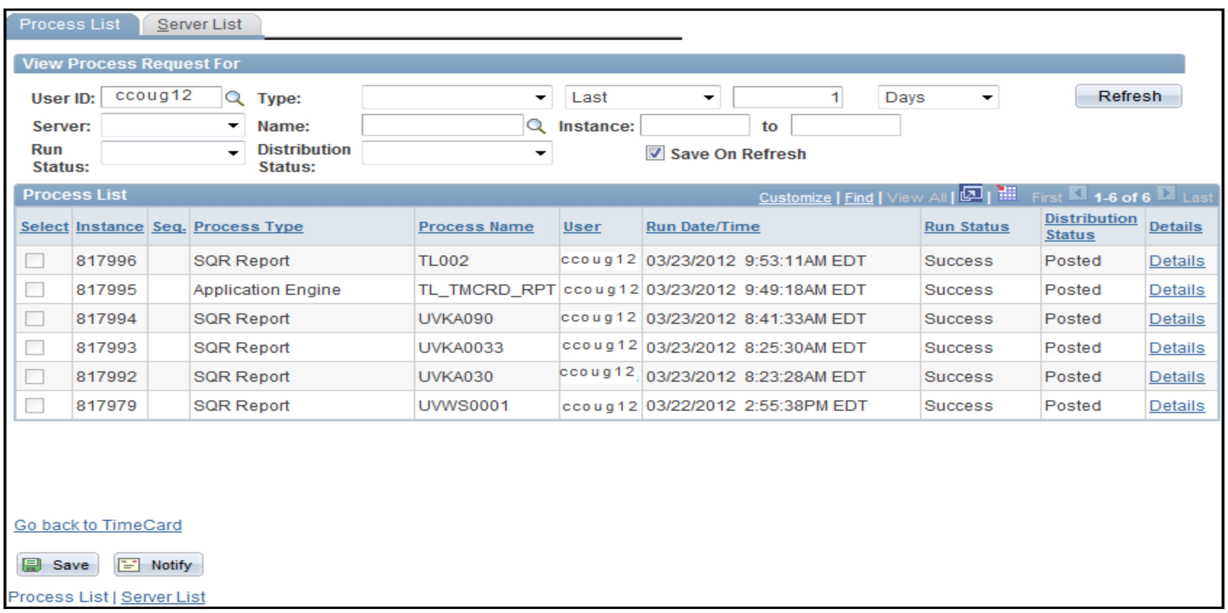
8. Click **OK**.

9. The screen will refresh. Note that now a process instance number is listed in the top right hand corner of the screen. This signifies that the time card report process has successfully begun.



10. Select the **Process Monitor** link.

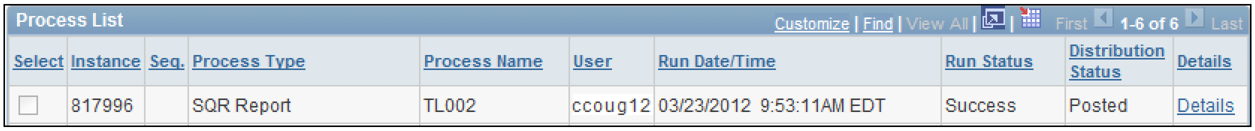
11. The **Process List** will appear.



12. Click the refresh button to update the screen.

Note: This report actually uses 2 processes. “SQR Report” and “Application Engine”

13. When the screen shows "**Success**" and "**Posted**" on both processes, proceed to the next step.

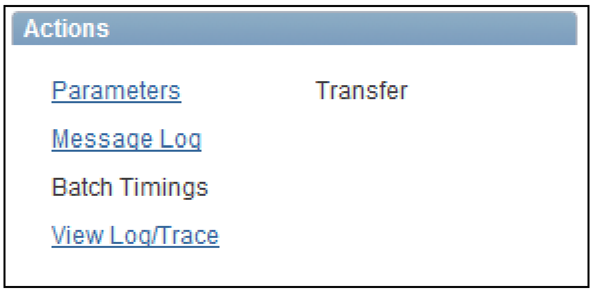


Process List — Customize | Find | View All | First 1-6 of 6 Last

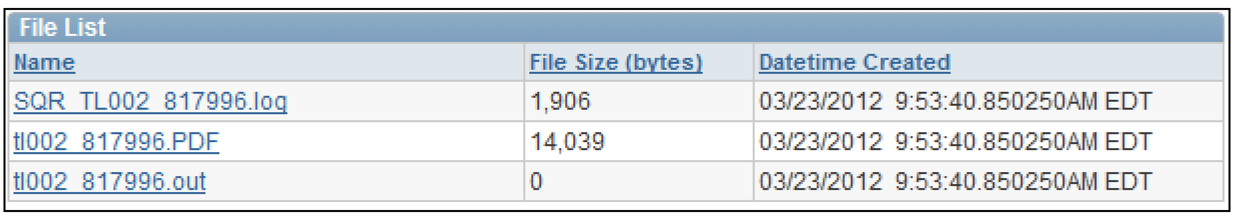
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	817996		SQR Report	TL002	ccoug12	03/23/2012 9:53:11AM EDT	Success	Posted	Details

14. Click on the **Details** link.

15. The Process Detail screen will appear. Click the **View Log/ Trace** link



16. The **View Log /Trace** screen will appear. Click on the PDF link to see the results.



File List

Name	File Size (bytes)	Datetime Created
SQR_TL002_817996.log	1,906	03/23/2012 9:53:40.850250AM EDT
tl002_817996.PDF	14,039	03/23/2012 9:53:40.850250AM EDT
tl002_817996.out	0	03/23/2012 9:53:40.850250AM EDT

17. Results will open up in a PDF document that can be saved on the computer or printed.

18. The report will include two sections:

- **Reported Elapsed Time** – Shows the time entered into the system.
- **Payable Time** – Shows the time that has been entered into **and** processed through the system. This section will show the status of the time as of the moment the report is run.

Description of Status Indicators:

- **Waiting for Approval** – Needs manager approval
- **Approved Goes to payroll** – waiting for Human Resource Services to run a payroll
- **Closed** – Paid out

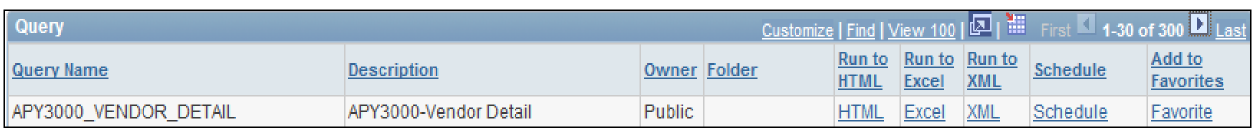
Accessing Information Using Queries

This guide will describe how to run a query to access departmental information. The information obtained is controlled by security access that allows only the departments that an employee is assigned to, to be viewed.

Note: Steps 1 through 7 are the same for all queries.

1. Log in to PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal).
2. Navigation: **Reporting Tools > Query > Query Viewer**
3. Enter the query desired into the search field and click search. The chosen query will show in a list below the search page.

4. By clicking on the appropriate link, to run the query to the screen (HTML) or to an Excel spreadsheet (EXCEL).



5. After clicking on the link to run in either Excel or HTML, the report parameters will appear.
6. Fill in the blanks with the specific information requested and click **View Results**

Commonly Used Queries

UV_PAY_ERN_DIST

Use this query to:

- View actuals for employees by department or individual
- View the status of retro distribution changes
- Determine whose wages are included in a particular salary amount from a budget status report
- Determine what chartstring a particular employee was paid from.
- Determine employees paid on a particular project.

General Tips:

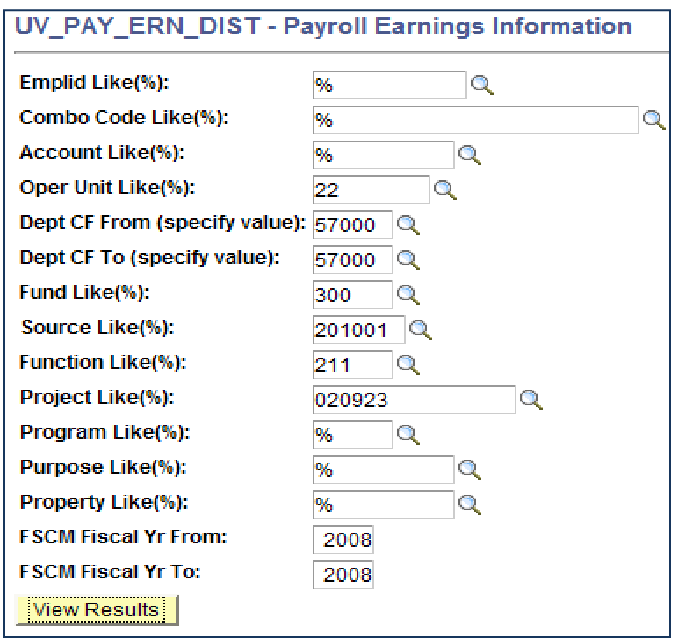
- Choose the amount of criteria to enter carefully. Enter enough criteria to limit the amount of information brought back without limiting the results so much that all the possible results aren't retrieved.
- **All** fields must have a value or a wildcard or no query results will return.
- Fields marked with **(%)** will accept % as a wildcard value.
- Enter part of a field with a wildcard.

  Example: 010%

- Use 00000 and 99999 as wildcard values for the **Dept From** and **Dept To** Fields.
- Enter a fiscal year. Wildcards are not valid in Fiscal Year Fields.

Determine whose wages are included in a particular salary amount from a budget status report

Enter criteria as shown below to determine the group of employees represented in a particular salary amount on a budget report.

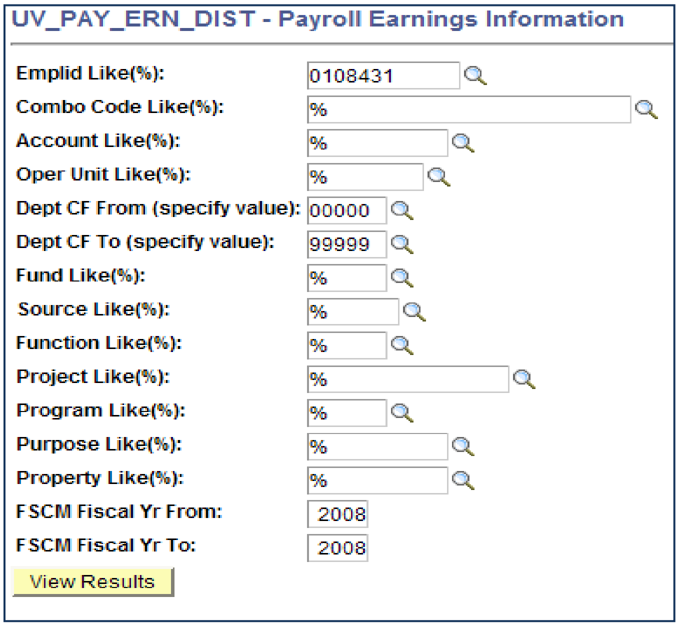

UV_PAY_ERN_DIST - Payroll Earnings Information

Emplid Like(%):	%
Combo Code Like(%):	%
Account Like(%):	%
Oper Unit Like(%):	22
Dept CF From (specify value):	57000
Dept CF To (specify value):	57000
Fund Like(%):	300
Source Like(%):	201001
Function Like(%):	211
Project Like(%):	020923
Program Like(%):	%
Purpose Like(%):	%
Property Like(%):	%
FSCM Fiscal Yr From:	2008
FSCM Fiscal Yr To:	2008

View Results

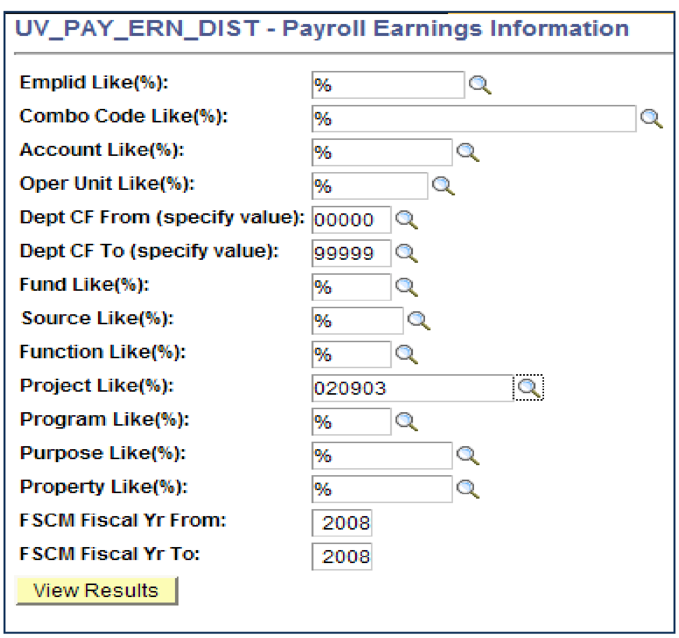
Determine what chartstring a particular employee was paid from

Enter criteria as shown below to determine what chartstring or chartstrings a particular employee was paid from.



Determine employees paid on a particular project

Enter criteria as shown below to determine which employees were paid on a particular sponsored or non-sponsored project.



Resources

If you have questions about information in this user guide, please e-mail Payroll Services.

Helpful Links

- Payroll Deadline Schedule
- UFS Roadshow Topics (PDF)
- Professional Development & Training Classes

Relevant UVM Departments

- Payroll Services
- Human Resource Services

Related Policies

- University Policies and Operating Procedures