

HR/Pay (HRSA) Reports Training

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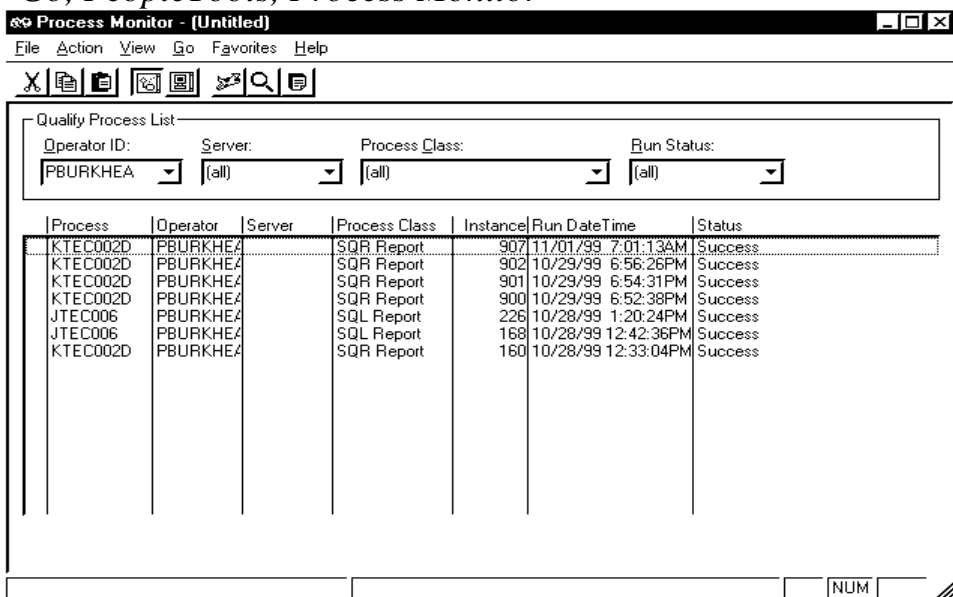
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<p>Directory Reports – please see the Directory Training Manual (separate document)</p>	
<p>Payroll Gross and Fringe Report – please see the DEMIS Report Manual (separate document)</p>	

* It is required that each department run the gross and fringe report and verify data to be sure that all employees were paid correctly for compensation, position and funding. This report is available after the payroll period has been calculated reminder notices are sent by email to the HRIS-L list serve.

Process Monitor

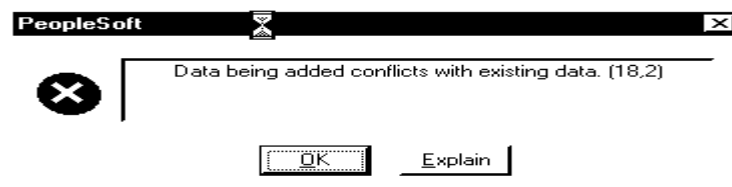
Go, PeopleTools, Process Monitor



- Process Monitor displays a listing of your current reports with the other information relative to their processing.
- To check to see if the status has changed - click on *Sparky* the dog (toolbar)
- To stop a process (status - “processing”) at this point or to clean up your list - *Action, Cancel, Delete*
- To clean your list out, highlight by clicking on your mouse (status - “delete” or “success” or “error”) and select -*Action, Delete*

Notes

- If you get this error message



assign a new run control id.

- Each Run Control ID is unique to each operator and can be mixed alpha and numeric-no special characters
- Run Control ID's are case sensitive.
- If you have difficulty printing, contact the Help Desk 4-0200.

Leave Accruals Reports by Emplid or Dept – PPE Range

Go, Time and Leave, Report, Accruals by Emplid-PPE Range or Accruals by Dept –PPE Range, Add (first time) or Update Display.

Run Control ID: Assign value to be used (report name)

OK: Click on with your mouse or use the enter key

Add -- Accruals by Emplid - PPE Range [X]

Run Control ID: [OK] [Cancel]

Accruals by Employee by Date Range

EmplID: Enter the Employee's Id (1XXXXXX)

From/To Pay Period End Date: You may only run this on payroll periods confirmed. Enter the end dates of the payroll periods desired. This report can not be run for dates earlier than 1/1/03. To run for one payroll period enter the same end date in the From and To fields

Employee Balances by Date Range

Operator ID: PBURKHEA
Run Control ID: accr_emplid_range
Language: English

Accruals by Department by Date Range

From Department, To Department: Put in your true department(s) (not cost centers) - for many the "to" and "from" are the same.

Order by Supervisor: Check on if you want this included – default is alpha. If report (printer) – page break by Supervisor then alpha.

From/To Pay Period End Date: You may only run this on payroll periods confirmed. Enter the end dates of the payroll periods desired. This report can not be run for dates earlier than 1/1/03. To run for one payroll period enter the same end date in the From and To fields.

Report Request Parameters

EmplID:

From Pay Period End Date: MM/DD/YYYY

To Pay Period End Date: MM/DD/YYYY

Run a Report/Run an Extract File: Check Run a Report to send to the printer or check Run an Extract File to import into excel.

Enter path and filename: If you have selected Run an Extract File indicate the path and file name to be able to import to excel.

Dept Balances by Date Range

Operator ID: PBURKHEA
Run Control ID: accrdept_range
Language: English

Report Request Parameters

From Department:

To Department:

Order by Supervisor

From Pay Period End Date: MM/DD/YYYY

To Pay Period End Date: MM/DD/YYYY

Run a Report

Run an Extract File Enter path and filename: c:\niper202.dat

This example is showing the data going to the c drive, you should select a secured drive - if you save to the c drive - please move the data to a secured drive and delete from the c drive. It is unknown what drives you will have available. Do not keep HR/Pay data unsecured.

Process Scheduler Request [X]

Operator ID: PBURKHEA Run Control ID: accrdept_range

Run Location: Client Server
Server:

Output Destination: File Printer Window
File/Printer: lpt1

Run Date/Time: Date: 11/01/2006 Time: 02:59:00 PM
Reset to current Date/Time

Run Recurrence: Once
Name:

[Description] | Name | Process Type Descr
JPER202 - Dept Accrual Bal | JPER202 | SDR Report

Select the first stoplight "Run"

Run Location: Select "Client"

Output Destination: "Printer" or "File" (if running as extract file)

OK: Click on with your mouse or use the enter key

• Check status on process monitor if desired.

Timesheet Print (Reports)

Go, Time and Leave, Report, Non Exempt Timesheet Print or Exempt Timesheet Print, Add (first time) or Update/Display

Run Control ID: Assign value to be used (report name)

OK: Click on with your mouse or use the enter key

Non Exempt and Exempt Timesheet Print

Business Unit: defaults - UKANS

Pay Period End Date: Enter the current for which you are printing the timesheets or select from the drop down box (MM/DD/YYYY).

From Department / To Department: Put in your true department(s) (not cost centers) - for many departments the “to” and “from” are the same. If you have multiple departments - only enter “to” and “from” for sequential numbers.

- Non exempts will print out one page for each position to which an active non exempt employee is assigned.
- Exempts will print multiple active persons on a page.



Select the first stoplight “Run”

Description	Name	Process Type Descr
Timesheet Print for Non Exempt	KTEC002D	SQR Report

Run Location: Select “Client”

Output Destination: “Printer”

OK: Click on with your mouse or use the enter key

- Check status on process monitor if desired.

Vacant Position Report

Go, Develop Workforce, Manage Positions, Report, Vacant Position Report, Add (first time) or Update/Display

Add -- Vacant Position Report

Run Control ID:

Manage Positions - Report - Vacant Position Report

File Edit View Go Favorites Use Setup Inquire Process Report Help

Parameters

Operator ID: PBURKHEA
Run Control ID: maddy2

Report Request Parameters:

As of Date: MM/DD/YYYY

Fiscal Year:

From Department: To Department:

Pay Group: Leave blank to print all

Job Code: Leave blank to print all

Pool ID: Leave blank to print all

Account Code: Leave blank to print all

HRSA Parameters Add

Run Control ID: Assign value to be used (report name)

OK: Click on with your mouse or use the enter key

As of Date: Generally today's date - your choice (MM/DD/YYYY)

Fiscal Year: Use current fiscal year (2008) – 4 digit field

From Department / To Department: Put in your true department(s) (not cost centers) - for many departments the “to” and “from” are the same. If you have multiple departments - only enter “to” and “from” for sequential numbers.

(Other Fields may be filled out as well.)



Select the first stoplight “Run”

Process Scheduler Request

Operator ID: PBURKHEA Run Control ID: maddy2

Run Location: Client Server
Server:

Output Destination: File Printer Window
File/Printer: lpt1

Run Date/Time: Date: 11/02/99 Time: 06:47:00 AM

Run Recurrence: Once
Name:

Description	Name	Process Type Descr
Vacant Position Report	JPER128	SQR Report

Run Location: Select “Client”

Output Destination: “Printer”

OK: Click on with your mouse or use the enter key

- Check status on process monitor if desired.

Funding Summary Report (Active Position)

Go, Define Business Rules, Define Budget/Encumbrnce(U.S.), Report, Funding Summary Report, Add (first time) or Update/Display

Add -- Funding Summary Report

Run Control ID:

OK
Cancel

Define Budget/Encumbrnce(U.S.) - Report - Funding Summary Report

File Edit View Go Favorites Setup Process Inquire Report Help

Run Parameters

Operator ID: PBURKHEA
Run Control ID: pjb

Report Request Parameters

SetID: Department:

Fiscal Year:

As Of Date:

Funding Summary By

Appointment Level Position Level

Report Option

Earnings Deductions Tax

Position Number:

HRSA Run Parameters Update/Display



Select the first stoplight "Run"

Process Scheduler Request

Operator ID: PBURKHEA Run Control ID: pjb

Run Location

Client Server

Server:

Output Destination

File Printer Window

File/Printer:

Run Date/Time

Date:

Time:

Reset to current Date/Time

Run Recurrence

Name:

New Update Delete

OK
Cancel

Description	Name	Process Type Descr
Funding Summary Report	BUD011	SQR Report

Run Control ID: Assign value to be used (report name)

OK: Click on with your mouse or use the enter key

SetID: defaults - UKANS

Department: Enter HR Position department number

Fiscal Year: Use current fiscal year (2010). 4 digit field

As Of Date: Generally current date - your decision (MM/DD/YYYY).

Position Level: - Only option available

Earnings, Deductions, Taxes: - Select the option you want

Position Number: May be left blank for whole department report or enter individual position number

Run Location: Select "Client"

Output Destination: "Printer"

OK: Click on with your mouse or use the enter key

- Check status on process monitor if desired.

Verification Report

Go, Administer Workforce, Administer Workforce(U.S), Report, Verification Report, Add (first time) or Update/Display

Update/Display -- Verification Report

Run Control ID:

Run Cntl | From Department

Administer Workforce (U.S.) - Report - Verification Report

File Edit View Go Favorites Use Setup Process Inquire Report Help

Parameters

Operator ID: PBURKHEA
Run Control ID: maddy1

Report Request Parameters

As of Date: MM/DD/YYYY

Fiscal Year:

Department ID:

Employee ID: Leave blank to print all

HRSA | Parameters | Add

Run Control ID: Assign value to be used (report name)

OK: Click on with your mouse or use the enter key

As of Date: Generally today's date - your choice (MM/DD/YYYY).

Fiscal Year: Use current fiscal year (2010) 4 digit field

Department ID: Put in your "true" department(s) (not cost centers)

Employee ID: Enter the Employee's Id (1XXXXXX) or leave blank if you want your total department to print



Select the first stoplight "Run"

Process Scheduler Request

Operator ID: PBURKHEA Run Control ID: maddy1

Run Location: Client Server
Server:

Output Destination: File Printer Window
File/Printer: lpt1

Run Date/Time: Date: 11/02/99 Time: 06:45:00 AM

Run Recurrence: Once
Name:

Description	Name	Process Type Descr
Verification Report	JPER127	SQR Report

Run Location: Select "Client"

Output Destination: "Printer"

OK: Click on with your mouse or use the enter key

- Check status on process monitor if desired.

Time Entry Report

Go, Time and Leave, Report, Time Entry Report, Add (first time) or Update/Display

Add -- Time Entry Report

Run Control ID:

OK Cancel

Run Control ID: Assign value to be used (report name)

OK: Click on with your mouse or use the enter key

Time and Leave - Report - Time Entry Report

File Edit View Go Favorites Use Report Help

Jtec014 Run Param

Operator ID: PBURKHEA Run Control ID: TIMEENTRY Language: English

Report Request Parameters

Business Unit: UKANS

Pay Period End Date: MM/DD/YYYY

From Department:

To Department:

HRSA Jtec014 Run Param Update/Displz

Business Unit: Defaults UKANS

Pay Period End Date: Enter the payroll period end date or select from the drop down box (MM/DD/YYYY).

From Department / To Department: Put in your true department(s) (not cost centers) - for many departments the “to” and “from” are the same. If you have multiple departments - only enter “to” and “from” for sequential numbers.



Select the first stoplight “Run”

Process Scheduler Request

Operator ID: PBURKHEA Run Control ID: pjbtimeentry

Run Location: Client Server

Server:

Output Destination: File Printer Window

File/Printer: lpt1

Run Date/Time: Date: 06/23/2000 Time: 06:59:00 PM

Run Recurrence: Once

Name: New Update Delete

Description	Name	Process Type Descr
Report Time and Leave Entered	JTEC014	SQR Report

OK Cancel

Run Location: Select “Client”

Output Destination: “Printer”

OK: Click on with your mouse or use the enter key

- Check status on process monitor if desired.

This report may be run to a file and imported into excel. Do not save on any unprotected drives such as your c drive.

Employee Year to Date Balances

Go, Compensate Employees, Maintain Payroll Data US, Report, Employee Year to Date Balances, Add (first time) or Update/Display

Run Control ID: Assign value to be used (report name)

OK: Click on with your mouse or use the enter key

Employee ID: Enter an Employee ID

Calendar Year: Enter Calendar Year (2010) 4 digit field



Select the first stoplight “Run”

Description	Name	Process Type Descr
Kpav318	KPAY318	SDR Report

Run Location: Select “Client”

Output Destination: “Printer”

OK: Click on with your mouse or use the enter key

- Check status on process monitor if desired.

Project/Grants Closing

Go, Define Business Rules, Define Budget&Encumbrnce(U.S.), Reports, Project/Grants Closing , Add (first time) or Update/Display

Run Control ID: Assign value to be used (report name)

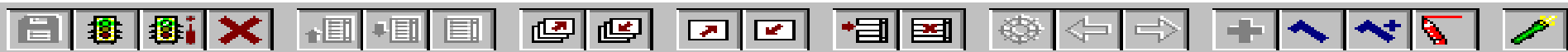
OK: Click on with your mouse or use the enter key

From Date: Enter beginning date (MM/DD/YYYY)

Thru Date: Enter ending date (MM/DD/YYYY)

Report Options: First option only list active account codes that are currently used on employees – probably the most common for departmental use. Second option list all active account codes whether used on employees or not – mainly used by RGS for KUCR.

Dept ID: Enter the “true HR” department that you are checking that would own the account code/grant. You may use a wild card after only entering 1 or more digits. Blank is generally designed for RGS for KUCR use. If you do not enter any value you will get the entire campus.



Select the first stoplight “Run”

Description	Name	Process Type Descr
Project/Grant Closing Report	JPAY177	SDR Report

Run Location: Select “Client”

Output Destination: “Printer”

OK: Click on with your mouse or use the enter key

- Check status on process monitor if desired.

Visa Holders Date Expire

Go, Administer Workforce, Administer Workforce (US), Report, Visa Holders Date Expire, Add (first time) or Update/Display

Add -- Visa Holders Date Expire

Run Control ID:

OK Cancel

Run Control ID: Assign value to be used (report name)

OK: Click on with your mouse or use the enter key

Administer Workforce (U.S.) - Report - Visa Holders Date Expire

File Edit View Go Favorites Use Setup Inquire Report Help

Ku Run Jpay303

Operator ID: TIMEKEEP
Run Control ID:

Report Request Parameters:

As of Date:

From Department (Blank for all):

HRSA | Ku Run Jpay303 | Add

As of Date: This report will list all active employees whose passport or visa has an expiration date within 90 days of the date you entered in this field (MM/DD/YYYY).

From Department: “HR” department that owns the position – generally you would only enter your department number. Please note that if you do not enter any value you will get the entire campus.



Select the first stoplight “Run”

Process Scheduler Request

Operator ID: TIMEKEEP Run Control ID: visa

Run Location: Client Server
Server:

Output Destination: File Printer Window
File/Printer:

Run Date/Time: Date: 10/09/2000 Time: 10:58:00 PM
Reset to current Date/Time

Run Recurrence:
Name:
New Update Delete

OK Cancel

Description	Name	Process Type Descr
Visa Holders with date expire	JPA303	SDR Report

Run Location: Select “Client”

Output Destination: “Printer”

OK: Click on with your mouse or use the enter key

- Check status on process monitor if desired.

KU Advice Print

Go, *Compensate Employees, Maintain Payroll Data (US), Report, KU Advice Print – Add (first time) or Update/Display*
This is only to print advices (advices are issued to those who have electronic funds deposit EFT). If an employee receives a paycheck (paper) you will not be able to print their information.

You may select to run by

Department Range: this is run by the “HR” department – the one that owns the position. If you run by Department Range – you may only run one voucher at a time.

From “HR” Department to “HR” Department : Enter the from and to HR department numbers - if you only have 1 dept number you will enter the same number in both fields, if you have multiple dept numbers and they are sequential then you would enter the lowest in From and the highest in To.

Pay Period End Date: Type in date (MM/DD/YYYY) or select from the drop down listing

Sort Order: Select the sort/print order (Name is by last name.)

Or

Specific Emplid: this is to run by an individual and you can run multiple payroll periods.

EmplID: enter the employees HRSA Employee ID (when you tab out the advices will appear in the boxes below) (You will need to take out and re-enter the ID to refresh the panel.)

Print: Select the ones you want to print by using the mouse.

Select the first stoplight “Run”

Run Location: Select “Client”

Output Destination: “Printer”

OK: Click on with your mouse or use the enter key.

Check status on process monitor if desired.

*** Please keep these documents
secure and confidential***

Compensation Summary Dept

Go, Administer Workforce, Administer Workforce (US), Report, Compensation Summary Dept– Add (first time) or Update/Display

This is made available for PRS to print summaries for their employees who can not access this document from the Kyou Portal.

Administer Workforce (US) - Report - Compensation Summary Dept

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

Compensation Summary

Operator ID: PBURKHEA Language: English

Run Control ID: compsumdept

Report Request Parameters

Run by Department: []

EmpID	Name
1	

You may select to run by

Run by Department: this is run by the “HR” department – the one that owns the position.

Or

EmplID: this is to run by an individual or individuals. Enter the HRSA Employee ID (You will need to take out and re-enter the ID to refresh the panel or you can delete (F8) the rows.)

You may enter more than one employee by inserting additional rows (F7) for each person. Please watch as some will have 2 pages if they receive the special note and you must give them the 2nd page.



HRSA Compensation Summary Update/Display

Process Scheduler Request

Operator ID: PBURKHEA Run Control ID: compsumdept

Run Location: Client Output Destination: Printer

Server: [] File/Printer: lpt1

Run Date/Time: Date: 06/06/2005 Run Recurrence: Once

Time: 04:06:00 PM Name: []

Reset to current Date/Time New Update Delete

Description	Name	Process Type Descr
Compensation Statement	JBEN279	SQR Report

Select the first stoplight “Run”

Run Location: Select “Client”

Output Destination: “Printer”

OK: Click on with your mouse or use the enter key.

Check status on process monitor if desired.

*** Please keep these documents secure and confidential***

Student Hourly Job Extract

Go, Administer Workforce, Administer Workforce (US), Report, Student Hourly Job Extracts– Add (first time) or Update/Display

Add -- Student Hourly Job Extracts

Run Control ID:

Instructions:

Effective Date:

Run by Department From Department:

Run by ARSP Code To Department:

Run by ARSP Code Area of Responsibility:

Create file jper215_<date_time>.csv in folder below:
Enter folder for output file. Do not include file name:

X Run Control ID: User assigned value (report name)
OK: Click on with your mouse or use the enter key
Instructions: will be posted when files are being used for specific updates. You will need to read this on the panel.
Effective Date: Enter the MM/DD/YYYY you want to extract the job data as of. (See instructions)

You may select to run by

Run by Department - From Department / To Department: Enter your “true HR position” department(s) (position dept) - for many departments the “to” and “from” are the same.

Or

Run by ARSP Code: If you are doing a unique area of responsibility you may run by this designation.
Enter folder for output file: Enter a secured drive and directory that you have access (not the c drive). A default will be displayed when doing add, please change.



Run Location: Client Server
 Server:

Output Destination: File Printer Window
 File/Printer:

Select the first stoplight “Run”
Run Location: Select “Client”
Output Destination: “File”
File/Printer: Defaults - %temp%\ (use defaulted value)
OK: Click on; with your mouse or use the enter key.

Check status on process monitor if desired.

*** Please keep these documents secure and confidential***

Once the file has completed (SQR goes away) it will have the file name jper215_DATE_TIME.csv (e.g. jper215_05292009_113330.csv). When opening you may need to change the file type to .csv to access. You may open with Excel and import as comma delimited or open from the directory you saved the file. You may change the file name if you wish.

Service Dates Report

Go, Administer Workforce, Administer Workforce (US), Report, Service Dates Report – Add (first time) or Update/Display. (Picture below may vary based on options displayed).

Add -- Service Dates Report [X]

Run Control ID:

OK

Cancel

Report Request Parameters

SetID:

Run by Department

Run by ARSP Code

Sort Option

Sort by Employee Name

Sort by Deptid then Employee Name

Sort by Supervisor then Employee Name

Run a Report

Run an Extract File

Enter path and filename:

Run Control ID: User assigned value (report name)

OK: Click on with your mouse or use the enter key

SetID: UKANS

You may select to run by

Run by Department - From Department / To Department:
Enter your “true HR position” department(s) (position dept) - for many departments the “to” and “from” are the same.

Or

Run by ARSP Code: If you are doing a unique area of responsibility you may run by this designation.

Sort Option: Select one

You may send to the printer or run to a file – Select one.

Run a Report: Sends the data to the lpt1 designated printer.

Run an Extract File: You will need to entered a secured drive in the path & then give it a file name (not the c drive)



Run Location

Client Server

Server:

Output Destination

File Printer

File/Printer:

Select the first stoplight “Run”

Run Location: Select “Client”

Output Destination: Printer if you selected Run a Report
File if you selected Run an Extract File

File/Printer: Use defaulted value

OK: Click on; with your mouse or use the enter key.

Once the file has completed (SQR window goes away) the report is done. If you selected an Extract File the extension will be .csv and you may open with Excel and import as comma delimited or open from the directory you saved the file into Excel.

You may change the file name if you wish.

*** Please keep these documents secure and confidential***

Temporary Hours Available April 3, 2008

Go, Administer Workforce, Administer Workforce(US), Report, Temp EEs worked over 750* hours, Add (first time) or Update/Display

Add -- Temp EEs worked over 750 hrs

Run Control ID:

Run Control ID: Assign value to be used (report name)
OK: Click on with your mouse or use the enter key

Ku Run Jpay138

Operator ID: PAM1
Run Control ID: temphours
Language: English

Report Hours Paid on Temporary Positions (not students)

Report Request Parameters

Calendar Year: 2008 (YYYY format required) Hours Limit: (Equal or more than Recommend 750)

Run for:

Department Range From Department: To Department:

Specific Emplid

Calendar Year: 4 digit field (e.g. 2010)

Hours Limit: Enter hours amount. Reports those who are => number entered. *You may enter any number greater than 0, it is recommended to monitor once an employee hits 750.

You may select to run by

Department Range: Enter your "true HR position" department(s) - for many departments the "to" and "from" are the same.

Or run by

Specific Emplid: Enter the Employee's Id (1XXXXXX)

You may send to the printer or run to a file - Select one.

Run to Report: Sends the data to the lpt1 designated printer.

Run an Extract File - Path and File Name: You will need to enter a secured drive in the path & give it a file name (not the c drive) e.g. u:/reports/temphours

Run for:

Department Range EmplID:

Specific Emplid

Output

Run to Report

Run to Extract File

Output

Run to Report

Run to Extract File

Path and File Name:

Operator Class: 72600000



Select the first stoplight "Run"

Run Location

Client Server

Server:

Output Destination

File Printer Window

File/Printer: lpt1

Run Location: Select "Client"

Output Destination: Select option and generally let File/Printer default.

Printer if you selected Run to Report (default lpt1)

File if you selected Run to Extract File (default %temp%\)

Run Location

Client Server

Server:

Output Destination

File Printer Window

File/Printer: %temp%\

OK: Click on with your mouse or use the enter key

• Check status on process monitor if desired.

All Position Report

Go, Develop Workforce, Manage Positions, Report, Posn Rpt (Filled / Vacant), Add (first time) or Update/Display

Add -- Position Rpt (Filled / Vacant) [X]

Run Control ID: [OK] [Cancel]

As of Date: [v]

From Department: [v]

To Department: [v]

Pay Group: [v] Leave blank to print all Empl Class: [v] Leave blank to print all

Job Code: [v] Leave blank to print all Reg/Temp: [v] Leave blank to print all

Run Control ID: Assign value to be used (report name)
OK: Click on with your mouse or use the enter key

As of Date: MM/DD/YYYY

From & To Department: Enter your "HR position" department(s) - for many departments the "to" and "from" are the same.

Pay Group/Empl Class/Job Code/Reg/Temp: Use the drop down box for selecting "a" value for one or all of these choices. OR If you want all do not select any options. You can select all or none or combinations.

Output

Run to Report

Run to Extract File

Output

Run to Report

Run to Extract File

Run to Report: Sends the data to the lpt1 designated printer.

Run an Extract File - Path and File Name: You will need to enter a secured drive in the path & give it a file name (not the c drive) (e.g. u:\reports\position list)

Path and File Name:



Run Location: Client Server

Server:

Output Destination: File Printer Window

File/Printer:

Select the first stoplight "Run"

Run Location: Select "Client"

Output Destination: Select option and generally let File/Printer default.

Printer if you selected Run to Report (default lpt1)

File if you selected Run to Extract File (default %temp%)

Run Location: Client Server

Server:

Output Destination: File Printer Window

File/Printer:

OK: Click on with your mouse or use the enter key

• Check status on process monitor if desired.