Procedure Manual
PeopleSoft Version 9.0

Running Processes and Reports
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How to Run Processes and Reports

This manual provides an overview of running processes and reports in PeopleSoft. This manual is not intended to describe how the processes or reports are to be used nor how other procedures that occur outside of the system are managed.

Process/Report Steps

Each process/report is run in a similar manner. Below are the steps to run a process/report. More specific instructions for the steps follow the list below.

1. Open the process/report page using the applicable navigation.
2. Add or select a Run Control ID.
3. Populate the process/report page.
4. Click the run icon.
6. Check the process status using the Process Monitor.
7. Review process/report output online or received an email from PeopleSoft Process Scheduler.

Run Control ID

The first time a process/report is run in PeopleSoft, a Run Control ID must be established. The Run Control ID is simply an identifier so that PeopleSoft can recognize which process/report is being run. The first time a process/report is run, the following must take place:

- Choose the process/report (ex. Departmental Leave Reports)
- Choose Add a New Value (options will be Add a New Value or Find an Existing Value)
- Choose a name for the process (no spaces, no special characters)

Using the Departmental Leave Reports as an example, the following window will display.
Enter a name that meets your needs best. In the example below, the process is named ‘Dept lv_report.’ Do not use special characters in the name. Only letters, numbers, and the underscore character should be used. Click on Add.

After the Run Control ID has been established, you can choose Search when running the process/report, as shown on the previous page.
Populate Process Page

Complete all required fields. Each report is different and some reports will not have any input required.

Click on Run.

The window on the following page will display.
Process Scheduler Request

The Description section will vary depending on the process being run. At least one option in the description area must be highlighted; however, most processes/report will only have one option listed. If there is more than process/report option in the description area, you may select one or all of the options. Each option selected will be included in process/report output.

Populate the window as follows:

1. **Server Name**: Select server, PSUNX.
2. **Type**: To view the process/report output online, select Web.
3. **Format**: Select PDF. Some processes/reports will also return data files in the output; however, PDF is still the Format to select.
4. **Distribution**: Click on this link to allow other end users access to the output. The following page will display.
Folder Name – Use the drop down menu if applicable.

Email With Log – Turn the checkbox on if you would like an email notification, otherwise, leave blank.

Email Web Report – Turn the checkbox on if you would like an email notification, otherwise, leave blank.

Email Subject – Enter the desired text to appear in the subject of the email if Email checkboxes are on.

Message Text – A message may be sent to email recipients, if desired, only if the Email checkboxes are on.

Email Address List – Enter the email address(es) for the desired report recipient(s) separated by a semi colon (:) and a space. By using this box, you are only sending an email notification that a report is available to be seen. This will not give the recipient access to view the report. In order for the recipient to view the report, the Distribute To section must be completed.

Distribute To:
ID Type – either ‘Role’ or ‘User’.
- Role is for a group that is already defined.
- User is for an individual.

*Distribution ID – enter the user’s ID or role name. Use the lookup feature if necessary.

As the person running the process or report, the ID Type should always say ‘User’ and the *Distribution ID should always be your own.

Click on OK. The Process Scheduler Request Screen will display again.

5. Click the OK button.

The status of the process/report must be checked in the Process Monitor.

STOP

Do not another process/report using the same Run Control ID until Successful shows in the status column of the Process Monitor.
**Process Monitor**

A **Process Instance** number on the process page is an indication that the report is running. The user may monitor the progress of the report as follows:

Click on the Process Monitor link (circled above).

The following page will display.
This page displays necessary information such as the process/report being run, the instance number, the run date and time, along with the status. If at any time the Run Status displayed is Error, email HRIS for further assistance. It is important to make note of the process name, run date/time, and the instance number.

In order to update the information in the Process Monitor, click the Refresh button. When the status changes to Success, the process/report has finished. Once the Distribution Status shows Posted, the output is ready to be reviewed online.
**Process/Report Output**

**Reviewing Process/Report Online**

To review the process/report output online, click on the Details link (circled below).

The following page will display.
Process Detail Page

Click on the View Log/Trace link (circled above).

The following page will display.
Report/Log Viewer

To view the report, click on the link that contains the process name. In this example, the process name is cfpay490 (circled above).

The report will now display.
Reviewing the Process/Report via Email

The process/report output will be sent as an attachment to the email and will be in the format selected on the Process Scheduler Request page.

To open the process/report, click on the link. You and/or other recipients of the email may have to log into PeopleSoft in order to access the output.
**Viewing and Printing Process/Report Output in PDF**

The process/report will display in Adobe Reader.

**Explanation of the Reader**

1. The report may be printed by clicking this icon or by selecting **File, Print** from the menu bar.

2. The **Page Up** or **Page Down** keys on the keyboard may also be used to page through the report, as well as the icons on the bottom of the page.

3. The number of pages in the report is displayed at the bottom of the page.
Opening Process/Report Output Data File in CSV

Some processes/reports include a data file in CSV format. To open these files, following the procedures below. The Cost Center Report is used in this example.

**From an email attachment:** Right-click the CSV attachment in the email. Select **Save As**.

**From the Report/Log Viewer:** Click on the link that contains the process name (Cost Center) with the .CSV extension. In the resulting dialog box, select **Save**.

The following dialog box will display:

![Save As dialog box]

Enter the file name you wish to save the file as and change the “Save in” drop down box to the folder in which you wish to save the file. The following dialog box will display.
Click on **Close**.

To open the file in Excel, open Excel then select File, Open from the menu. The following dialog box will display.

Navigate to the folder in which the file has been saved in the ‘Look in:’ drop down box.

Open Excel. Click on the saved file, then click the **Open** button. The following dialog box will display.
If not already selected, click on the **Delimited** radio button (as shown above). Then click on the **Next** button. The following dialog box will display.

If not already selected, click on the **Comma** checkbox (as shown above). Then click on the **Next** button. The following dialog box will display.
Click on the **Finish** button. The data will now be loaded to an Excel worksheet as shown in the example below.
Cost Center Report

This report is available for employees who have responsibility for maintaining the departmental budget. To obtain access to this report, the employee must complete and submit a Departmental Cost Center Authorization List form, which is available on the Human Resources website at http://hr.ucf.edu, under Forms. Upon receipt of the form, a Human Resources Payroll Services staff member will provide the security that is necessary to access this report.

The Cost Center Report lists all employee payroll charges that were made for the pay period for each department number. This report can be accessed at anytime; however, cost data for each pay period will not be available until Tuesday of pay week.

The report comes in two formats, PDF and a data file (CSV). Both reports are included in the output when the process is run. Refer to the Viewing and Printing Process/Report Output in PDF and Opening Process/Report Output Data File in CSV sections of this manual for instructions on how to open and view the report in the different formats.

Information displayed in the report includes:

- Employee ID#
- Employee Name
- Hours paid
- Gross amount
- Withholding tax
- FICA tax
- Net amount
- Employer matching
  - FICA tax
  - Retirement
  - Pretax (FICA savings)
  - SHL/Home (Health insurance)
  - SLife (Life insurance)
  - Disability
  - Total matching
- Total Payroll Cost

The navigation to access the report is as follows:

**HR Custom>HR Report>Payroll>Cost Center Report**
Process Page

Enter the **Group ID** for the department for which the report is to be generated.

Follow the steps outlined in the **How to Run Processes and Reports** section of this manual.
Sample Cost Center PDF Report

Sample Cost Center CSV Data File
Department Group Rate Report

All departmental processors and authorizers will have access to the **Department Group Rate Report**. This report can be accessed at any time and will display valuable employee information, including name, emplid ID #, record #, pay group, hourly rate (for USPS and OPS employees), biweekly rate (for USPS, A&P, and Faculty employees), department number and other department information, the effective date of the last payroll activity, and employee status.

The navigation is as follows:

**Home>HR Custom>HR Report>PAYROLL>Delegated Users**

**Process Page**

Enter the **Group ID** for the department for which the report is being generated.

Follow the steps outlined in the **How to Run Processes and Reports** section of this manual.
Sample Departmental Rate Report

Name: Name of the employee.

EmplID: The employee’s ID number, assigned by PeopleSoft.

Rcd#: The record number assigned to an employee; 0-3 (line positions), 4-7 OPS positions.

Pay Group: The employee’s pay group, i.e., OPS, USPS, etc.

Hourly Rate: Hourly rate of pay displayed for USPS and OPS hourly employees.

Biweekly Rate: Biweekly rate of pay displayed for all pay groups except OPS hourly.

Dept ID: The account number from which the employee is being paid.

Dist Percent: The percentage of pay coming from the account.

Primary Dept: Indicates which account is the primary account for an employee.

EffDt: Indicates the date effective date of the most recent payroll action for the employee.

Employee Status: Indicates if the employee is Active, on Short Work Break, on Leave W/Pay or Leave W/O Pay.
Departmental Leave Report

All departmental processors/authorizers will have access to generate Departmental Leave Reports in PeopleSoft. This report should be run three workdays, usually Tuesday, after the end of the pay period. The report should be printed, and the person who has responsibility for maintaining leave and attendance records for the department must check the report to verify that the leave balances for each employee are correct. This report should be kept in the department for at least three fiscal years.

The navigation is as follows:

Home>HR Custom>HR Report>Payroll>Departmental Leave Reports

Process Page

The Pay Begin Date will default to the beginning date for the previous pay period. If you need to view the report for a pay period other than the previous pay period, change the date to the Pay Begin Date for that pay period. The Pay End Date will automatically correspond to the Pay Begin Date.

Enter the Group ID for the department for which the report is being generated. If the report is being run for the entire department, leave the Workgroup field blank.

Follow the steps outlined in the How to Run Processes and Reports section of this manual.
### Sample Departmental Leave Report

<table>
<thead>
<tr>
<th>Name</th>
<th>EmplID</th>
<th>Rcd#</th>
<th>Type</th>
<th>Old Balance</th>
<th>Hours Adjusted</th>
<th>Hours Used</th>
<th>Hours Earned</th>
<th>New Balance</th>
<th>Balance in Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anderson, Ann</td>
<td>1234567</td>
<td>0</td>
<td>A&amp;P</td>
<td>126.12</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>126.12</td>
<td>15.77</td>
</tr>
<tr>
<td>V. Bailey</td>
<td>2345678</td>
<td>9</td>
<td>USPS</td>
<td>85.67</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>85.67</td>
<td>0.00</td>
</tr>
<tr>
<td>Carson, Cowboy</td>
<td>3456789</td>
<td>1</td>
<td>A&amp;P</td>
<td>105.41</td>
<td>0.00</td>
<td>0.00</td>
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<td>23.33</td>
</tr>
<tr>
<td>Dog &amp; Duck</td>
<td>2232222</td>
<td>9</td>
<td>USPS</td>
<td>38.79</td>
<td>0.00</td>
<td>0.00</td>
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</tr>
<tr>
<td>E. Eiko</td>
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<td>29.32</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>29.32</td>
<td>1.47</td>
</tr>
</tbody>
</table>

**Name:** Name of the employee  

**EmplID:** The employee’s ID number, assigned by PeopleSoft  

**Rcd#:** The record number assigned to an employee; 0-3 (line positions), 4-7 OPS positions  

**Type:** The employee’s pay group, i.e., USPS, A&P, etc.  

**Old Balance:** The employee’s leave balance [hours] at the beginning of the pay period  

**Hour Adjusted:** Reflects any leave adjustments during the current pay period  

**Hours Used:** Reflects leave hours used during the current pay period  

**Hours Earned:** Reflects leave hours earned during the current pay period  

**New Balance:** The employee’s leave balance [hours] at the end of the current pay period  

**Balance in Days:** The employee’s leave balance [days] at the end of the current pay period
Employee Timesheets

All departmental payroll processors/authorizers will have access to generate Employee Timesheets in PeopleSoft. The Employee Timesheets may be run at any time, but should be run and distributed to the employees prior to the beginning of each pay period.

The navigation is as follows:

Home>HR Custom>HR Report>Payroll>Employee Timesheets

Process Page

The Pay Begin Date will default to the begin date for the current pay period. If the report is being run for a pay period other than the current pay period, you will need to change the Pay Begin Date to the begin date for the pay period for which the report is being run. The Pay End Date will default to end date for the selected pay period.

Enter the Group for the department for which the report is being generated. If the report is being run for the entire department, leave the EmplID field blank.

If the report is being run for a specific employee, you must also enter the employee’s EmplID and Empl Red Nbr.

Follow the steps outlined in the How to Run Processes and Reports section of this manual.
Sample Employee Timesheet Reports

University of Central Florida
Employee Time Sheet

Employee Name: Ina
Emp ID: 0123456
Work Group: CHED
Group: F010

<table>
<thead>
<tr>
<th>Date</th>
<th>In</th>
<th>Out</th>
<th>In</th>
<th>Out</th>
<th>In</th>
<th>Out</th>
<th>In</th>
<th>Out</th>
<th>Total Hours Worked</th>
<th>Total Hours Worked</th>
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<tbody>
<tr>
<td>08/11</td>
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</tr>
</tbody>
</table>

Leave and Pay Exceptions Report Attached: No

NOTE: Leave and Pay Exceptions Report must match. Employees should not be allowed to work during.

Page 25
Employee Leave Reports

All departmental payroll processors/authorizers will have access to generate Employee Leave and Pay Exceptions Reports in PeopleSoft. The reports should be run three workdays, usually Tuesday, after the end of the pay period. Processors must print the reports and distribute to employees.

The navigation is as follows:

Home>HR Custom>HR Report>Payroll>Employee Leave Report

**Process Page**

![PeopleSoft Menu and Process Page](image)

The Pay Begin Date will default to the beginning date for the previous pay period. If you need to run the report for a pay period other than the previous pay period, change the date to the Pay Begin Date for that pay period. The Pay End Date will automatically correspond to the Pay Begin Date.

Enter the Group ID for the department for which the report is being generated. If the report is being run for the entire department, leave the Workgroup field blank.

To run a Leave and Pay Exceptions Report for one employee, enter the employee’s EmplID.

Follow the steps outlined in the How to Run Processes and Reports section of this manual.
Sample Employee Leave Reports

University of Central Florida
Leave and Pay Exception Report (LAPER)

Employee, Jax
ID: 0123456
Emp: 123
Work Grp: USNEX
Groups: 0200

Primary Department: 0260001

Old Leave Balances: 56.78
Prior Pay Period - Begin: 04/17/2009
End: 04/30/2009

Used: 0.00
Adjusted: 0.00
Earned: 0.00

New Leave Balances: 56.78

Old Leave Balances: 0.00

Current Pay Period - Begin: 05/01/2009
End: 05/14/2009

Working Hours: 40.30

Actual Hours: 40.30

OIT: 0.00
OEE: 0.00

Week 2 Total: 40.30

* Represents hours worked + holidays + personal holiday + administrative leave

Show Leave Used for Week 1 Below

Show Leave Used for Week 2 Below

Enter Biweekly On-call Amount $