



Procedure Manual PeopleSoft Version 9.2

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.

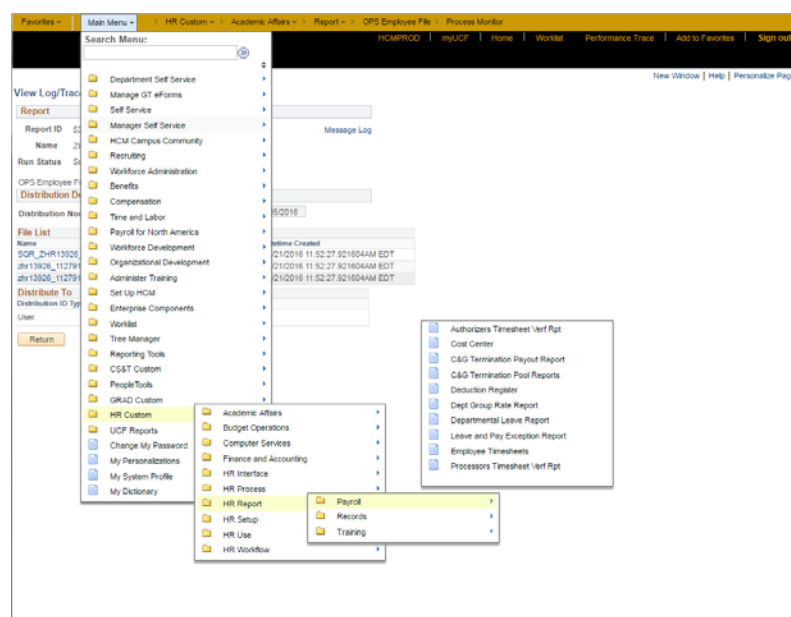
1. Open the process/report page using the applicable navigation.
2. Add or select a Run Control ID.
3. Populate the process/report page.
4. Click the run icon.
5. Populate Process Scheduler Request page.
6. Check the process status using the Process Monitor.
7. Review process/report output online or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



The Run Control ID page will default to Find an Existing Value. Click on the Add a New Value folder tab to set up a new Run Control ID.

The screenshot shows the 'Departmental Leave Reports' page. At the top is a navigation bar with 'Favorites', 'Main Menu', and a breadcrumb trail: 'HR Custom > HR Report > Payroll > Departmental Leave Report'. Below this is a header with the UCF logo and links: 'HCMPROD', 'myUCF', 'Home', 'Worklist', 'Performance Trace', 'Add to Favorites', and 'Sign out'. On the right, there are links for 'New Window' and 'Help'. The main heading is 'Departmental Leave Reports', followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. A 'Search Criteria' section is expanded, showing 'Search by:' with a dropdown set to 'Run Control ID begins with' and an empty text box. There is a 'Case Sensitive' checkbox and a 'Limit the number of results to (up to 300):' field with '300' entered. At the bottom of the search criteria are 'Search' and 'Advanced Search' buttons. At the very bottom of the page are links for 'Find an Existing Value' and 'Add a New Value'.

Enter a name that meets your needs best. In the example below, the process is named 'Dept_Lv_Rpt.' Do not use special characters in the name. Only letters, numbers, and the underscore character should be used. Click on **Add**.

This screenshot shows the 'Add a New Value' tab selected. The 'Run Control ID' text box now contains the value 'Dept_Lv_Rpt'. The 'Add' button is visible below the text box. The rest of the page layout, including the navigation bar and header, remains the same as in the previous screenshot.

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

The screenshot shows the 'Dept Leave Report' page in a PeopleSoft application. The top navigation bar includes 'Favorites', 'Main Menu', and a breadcrumb trail: 'HR Custom > HR Report > Payroll > Departmental Leave Report'. The user is logged in as 'HCMPROD' with links for 'myUCF', 'Home', 'Worklist', 'Performance Trace', 'Add to Favorites', and 'Sign out'. The page title is 'Dept Leave Report' with links for 'New Window', 'Help', and 'Personalize Page'. The main form area contains the following elements:

- 'Run Control ID' set to 'Dept_Lv_Rpt' and a 'Run' button.
- 'Report Manager Process Monitor' link.
- Title: 'Departmental Leave Report For The New Pay Period'.
- *Pay Begin Date: 02/26/2016 (with a search icon) and Pay End Date: 03/10/2016.
- A form box with:
 - 'Group:' dropdown set to '0260' (with a search icon) and 'Human Resources' text.
 - 'Workgroup:' dropdown set to 'APF' (with a search icon).
 - Instruction: 'Leave Group blank to select all groups.'
- Buttons at the bottom: 'Save', 'Notify', 'Add', and 'Update/Display'.

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

Process Scheduler Request

User ID: memyers Run Control ID: Dept_Lv_Rpt

Server Name: PSUNX Run Date: 03/21/2016

Recurrence: Run Time: 12:12:40PM

Time Zone: FTP Control Command:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Departmental Leave Report	CFPAY490	SQR Report	Web	PDF	Distribution


OK Cancel

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 or Email.
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.

[Favorites](#) | [Main Menu](#) | [HR Custom](#) | [HR Report](#) | [Payroll](#) | [Departmental Leave Report](#)


[HCMPROD](#) | [myUCF](#) | [Home](#) | [Worklist](#) | [Performance Trace](#) | [Add to Favorites](#) | [Sign out](#)

[New Window](#) | [Help](#) | [Personalize Page](#)

Distribution Detail

Process Name: CFPAY490
 Process Type: SQR Report
 Folder Name:
 Retention Days:

Email Only

Email Subject: Email With Log: ☐ Email Web Report: ☐

Message Text:

Email Address List:

Distribute To

*ID Type	*Distribution ID
User	memyers

Email Subject – Enter the desired text to appear in the subject of the email.

Message Text – A message may be sent to email recipients, if desired.

Email Address List – Enter the email address(es) for the desired report recipient(s) separated by a semi colon (;) and a space.

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

- Click the **OK** button.

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



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:

The screenshot shows the 'Dept Leave Report' page in the PeopleSoft interface. The breadcrumb trail is: Favorites > Main Menu > HR Custom > HR Report > Payroll > Departmental Leave Report. The page title is 'Dept Leave Report'. Below the title, there is a 'Run Control ID' field with the value 'Dept_Lv_Rpt' and a 'Report Manager Process Monitor' link. A 'Run' button is also present. The 'Process Instance: 11279197' is circled in red. Below this, the text 'Departmental Leave Report For The New Pay Period' is displayed. The 'Pay Begin Date' is '02/26/2016' and the 'Pay End Date' is '03/10/2016'. There are search fields for 'Group' (value: 0260, label: Human Resources) and 'Workgroup' (value: APF). A note says 'Leave Group blank to select all groups.' At the bottom, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

Click on the **Process Monitor** link (circled above).

The following page will display.

The screenshot shows the 'Process Monitor' page in the PeopleSoft interface. The breadcrumb trail is: Favorites > Main Menu > HR Custom > HR Report > Payroll > Departmental Leave Report > Process Monitor. The page title is 'Process Monitor'. Below the title, there are tabs for 'Process List' and 'Server List'. The 'Process List' tab is selected. Below the tabs, there is a 'View Process Request For' section with fields for 'User ID' (value: memyers), 'Type' (dropdown), 'Last' (dropdown), '1' (text), 'Days' (dropdown), 'Refresh' button, 'Server' (dropdown), 'Name' (text), 'Instance' (text), 'to' (text), 'Run Status' (dropdown), 'Distribution Status' (dropdown), and a checkbox for 'Save On Refresh'. Below this is a table titled 'Process List' with columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains one row with the following data: [checkbox], 11279197, SQR Report, CFPAY490, memyers, 03/21/2016 12:12:40PM EDT, Success, Posted, Details. At the bottom, there is a link 'Go back to Departmental Leave Reports', buttons for 'Save' and 'Notify', and a link 'Process List | Server List'.

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	11279197		SQR Report	CFPAY490	memyers	03/21/2016 12:12:40PM EDT	Success	Posted	Details

This panel 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).

Process List | Server List

View Process Request For

User ID: memyers Type: Last 1 Days Refresh

Server: Name: Instance: to: Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	11279197		SQR Report	CFPAY490	memyers	03/21/2016 12:12:40PM EDT	Success	Posted	Details

Go back to Departmental Leave Reports

Save Notify

Process List | Server List

The following page will display.

Process Detail Page

Process Detail

Process

Instance 11279197 Type SQR Report

Name CFPAY490 Description Departmental Leave Report

Run Status Success Distribution Status Posted

Run Update Process

Run Control ID Dept_Lv_Rpt

Location Server

Server PSUNX

Recurrence

Hold Request

Queue Request

Cancel Request

Delete Request

Restart Request

Date/Time Actions

Request Created On 03/21/2016 12:13:47PM EDT Parameters Transfer

Run Anytime After 03/21/2016 12:12:40PM EDT Message Log

Began Process At 03/21/2016 12:14:07PM EDT Batch Timings

Ended Process At 03/21/2016 12:14:19PM EDT View Log/Trace

OK Cancel

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

The following page will display.

Report/Log Viewer

UCF

View Log/Trace

Report

Report ID 5371570 Process Instance 11279197 Message Log

Name CFPAY490 Process Type SQR Report

Run Status Success

Departmental Leave Report

Distribution Details

Distribution Node reportnode Expiration Date 05/05/2016

File List

Name	File Size (bytes)	Datetime Created
SQR_CFPAY490_11279197.log	2,174	03/21/2016 12:14:19.526136PM EDT
cfpay490_11279197.PDF	16,018	03/21/2016 12:14:19.526136PM EDT
cfpay490_11279197.out	30	03/21/2016 12:14:19.526136PM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	memyers

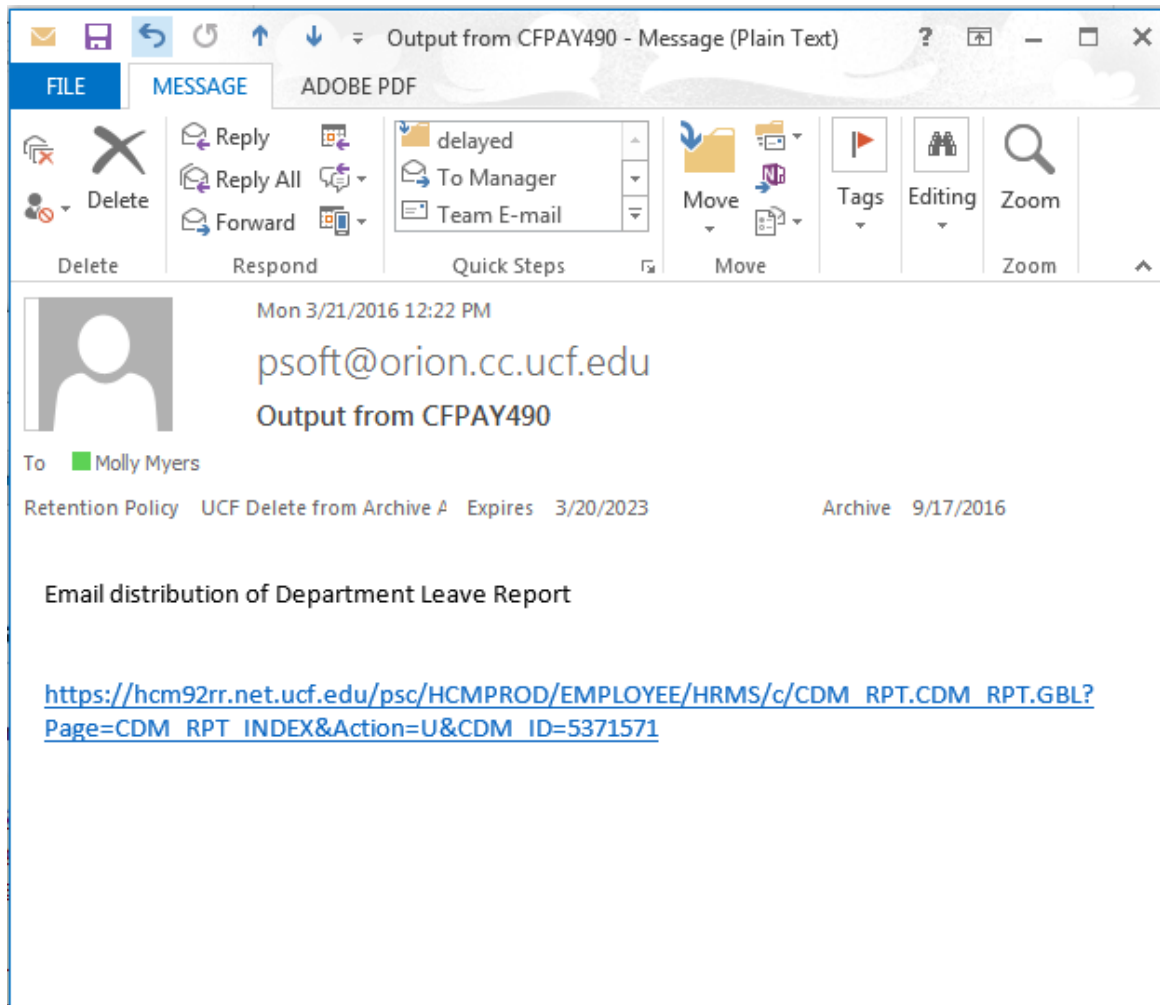
Return

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

An email will be sent to the specified email address. In the body of the email will be a link that will direct the user to the Report/Log Viewer page in PeopleSoft.

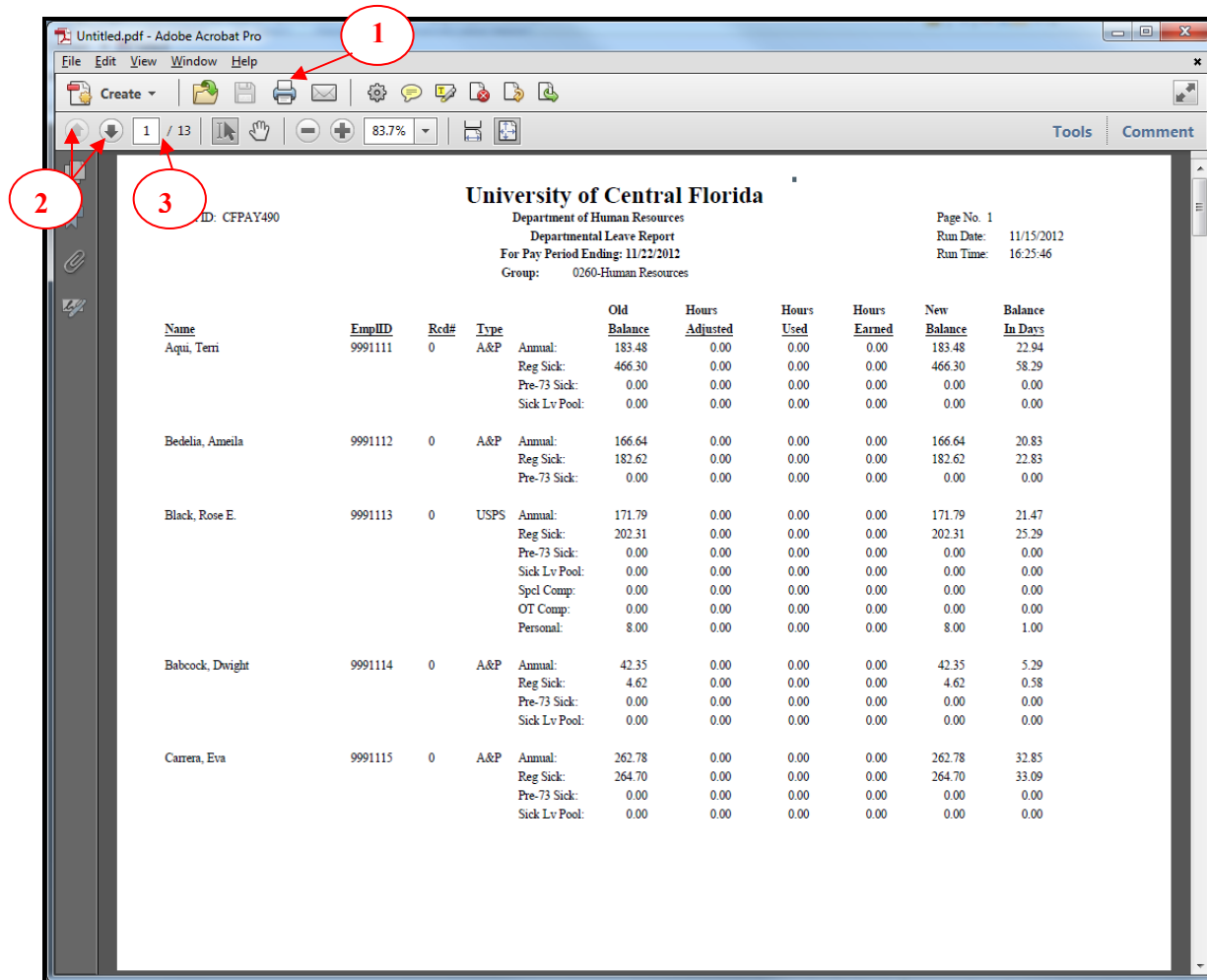


To view the report, click on the link that contains the process name.

The report will now display.

Viewing and Printing Process/Report Output in PDF

The process/report will display in Adobe Reader.



Explanation of the Reader

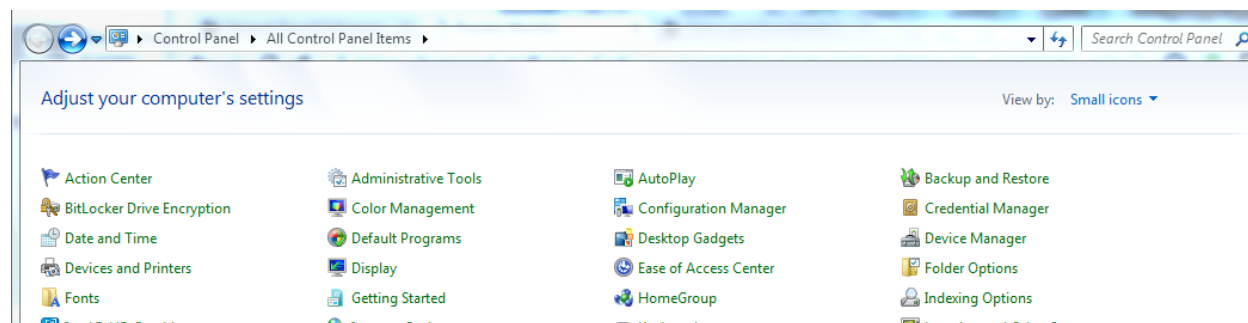
1. The report may be printed by clicking this icon or by selecting **File, Print** from the menu bar.
2. These icons may be used to page through the report. The **Page Up** or **Page Down** keys on the keyboard may also be used to page through the report.
3. The number of pages in the report is displayed here.

Opening Process/Report Output Data File in CSV

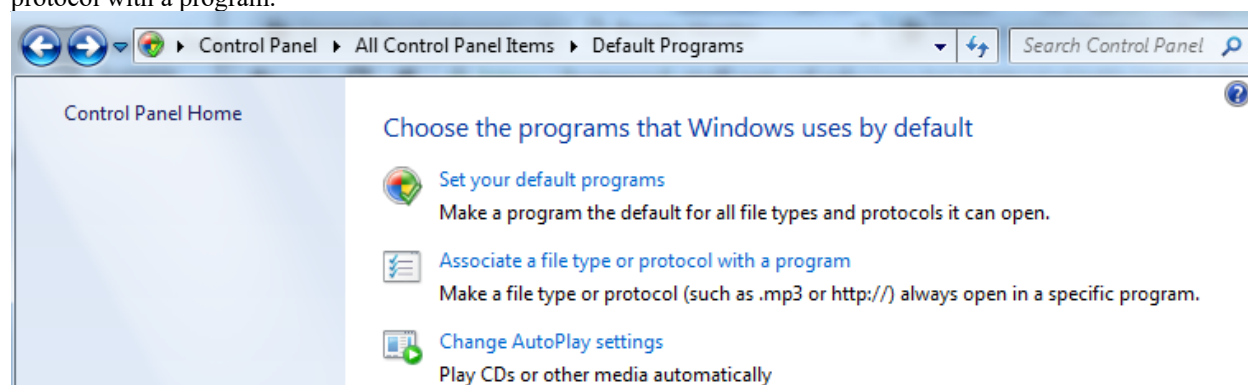
Some processes/reports include a data file in CSV format. The recommended program to use for opening CSV files is Microsoft Excel. To ensure optimal results, set your computer's default program for CSV files to Microsoft Excel before attempting to download and use any of these files.

Note: All operating systems are different, so the steps below apply to Windows 7 and prior. Your screen may appear differently.

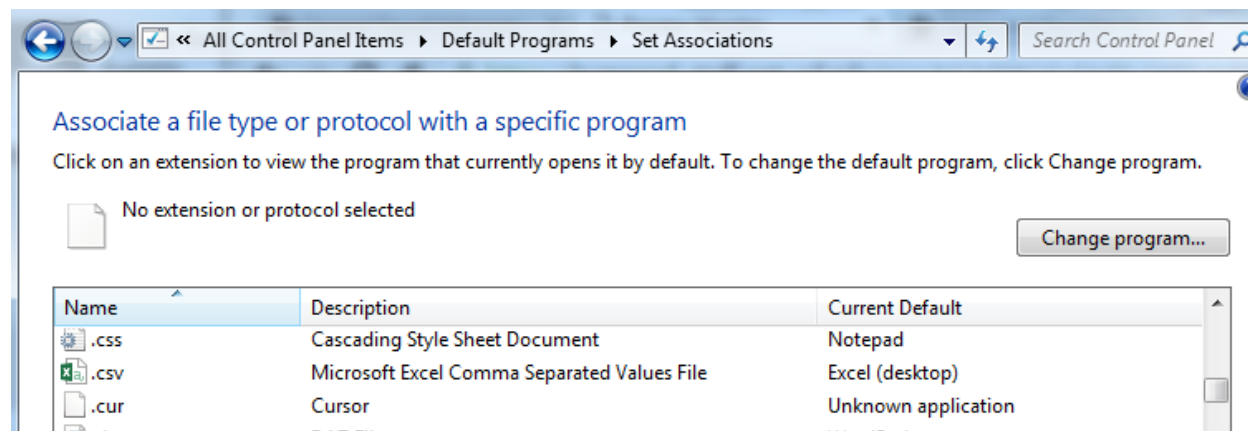
Via the Start button on your computer, select the Control Panel, and Default Programs.



From there, ensure that the file type is associated with the correct program by selecting “Associate a file type or protocol with a program.”



Locate the .csv (Microsoft Excel Comma Separated Values File) format, and ensure that Excel is selected as the current default.



After your defaults have been confirmed, when selecting any CSV output from the process monitor, the file will open in Microsoft Excel in an easy to utilize format.

Distribution Details

Distribution Node reportnode **Expiration Date** 05/05/2016

File List

Name	File Size (bytes)	Datetime Created
SQR_CFPY4529_11279199.log	2,162	03/21/2016 12:27:23.234496PM EDT
cfpy4529_11279199.out	742	03/21/2016 12:27:23.234496PM EDT
cfpy4529_11279199_Cost_Center.PDF	16,073	03/21/2016 12:27:23.234496PM EDT
cfpy4529_11279199_Cost_Center_csv	41,886	03/21/2016 12:27:23.234496PM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	memyers

Return

cfpy4529_11279199_Cost_Center_(1) - Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Departme	Emplid	Name	Hours	Gross	Withhold	FICA	Net	FICA	Retiremer	PreTax	SHL/Hom	SLife	ST Disabil	Total Mat	Total Payroll	Cost		
2	02602001	19992500-0	Smith Johr	240	8499.48	609.57	603.43	6308.51	603.43	617.07	46.8	1896.09	5.37	0	3168.76	11668.24			
3	02602001	19994840-0	Johnson St	240	4199.37	300.69	295.79	2877.7	295.79	304.86	25.47	1896.09	5.37	0	2527.58	6726.95			
4	02602001	19999999-0	Ayala Keven	240	4157.83	453	233.87	3335.73	233.87	240.68	18.17	887.38	5.37	0	1557.47	5035.70			

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 prior to paydate 08/04/2017 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

Due to the Composite Fringe Benefit Rate project implementation, information displayed in the report as of paydate 08/04/2017 and after includes values for the following:

- Employee ID#
- Employee Name
- Hours paid
- Gross amount
- Withholding tax
- Net amount
- Total Payroll Cost


The navigation to access the report is as follows:

HR Custom>HR Report>Payroll>Cost Center

Process Page

Favorites ▾

Main Menu ▾ > HR Custom ▾ > HR Report ▾ > Payroll ▾ > Cost Center

HCMPROD | myUCF | Home |

Dept Cost Center


Run Control ID Audit Report Manager Process Monitor Run


Process: CFPY4529.SQR


Description: Cost Center Reports


Output Files: Cost_Center.csv


FTP Control: None


Starting Pay Period End Date:  If you want report to cover multiple pay periods, enter a starting Pay Period End Date. Otherwise, leave blank.


Through Pay Period End Date:  If blank, will default to the "current" Pay Period End Date. (Based on the Pay Period Closing Date).

Department:  If blank, will default to all Departments OprId can see. (Based on Cost Center Security).

 Save

 Return to Search

 Add

 Update/Display

Enter the data in the **Starting Pay Period End Date**, **Through Pay Period End Date** and/or **Department** fields unless you are planning on running the report for the current pay period for all departments for which you have access.

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

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, and the effective date of the last payroll activity.

The navigation is as follows:

Home>HR Custom>HR Report>Payroll>Dept Group Rate Report

Process Page

The screenshot shows the 'Dept Group Rate Rpt' process page. At the top, a navigation breadcrumb trail reads: Favorites > Main Menu > HR Custom > HR Report > Payroll > Dept Group Rate Report. Below this is the UCF logo. The page title is 'Dept Group Rate Rpt'. Underneath, it says 'Run Control ID CFHR0455' and 'Report Manager Process Monitor' with a 'Run' button. The main heading is 'Departmental Group Rate Report' with the subtext 'Lists employees assigned to your group'. A search bar contains '0260' and a magnifying glass icon. To the right of the search bar is a table with columns 'Group ID' and 'Description'. The table has one row with '0260' and 'Human Resources'. Above the table are 'Find', 'First', '1 of 1', and 'Last' buttons. Below the table are 'Save', 'Return to Search', 'Add', and 'Update/Display' buttons.

Dept Group Rate Rpt

Run Control ID CFHR0455 Report Manager Process Monitor Run

Departmental Group Rate Report
Lists employees assigned to your group

Group ID	Description
0260	Human Resources

Find First 1 of 1 Last

Save Return to Search Add Update/Display

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

University of Central Florida													
Report ID: CFPY2133				Department of Human Resources				Page No. 3					
				Departmental Rate Report				Run Date: 03/21/2016					
				Group: 0260 Human Resources				Run Time: 12:51:40					
Name	EmplID	Rcd#	Pay Group	Hourly Rate	Biweekly Rate	Dept ID	Dist Percent	Primary Dept	Effdt	Employee Status	Last Check PPE Date	OPS Ben Elig Ind	
Santiago-Rivera, Lixbed	4210757	0	12M Fac/AP	.000000	1628.35	02602001	100.00	P	03-MAR-2016	Active	10-MAR-2016		
Sgambati, Karen	3620089	0	USPS NonEx	15.675177	1254.01	02602001	100.00	P	26-FEB-2016	Active	10-MAR-2016		

cfpy2133_11279211_Dept_Rate_11279211 - Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Last Name	First Name	EmplID	Empl Rcd	PayGroup	Hourly Rate	Biweekly Rate	DeptID	Dist Percent	Pay Type	Effdt	Status	Last Check PPE Date	OPS Ben Elig Ind
1	Anderson	Benton S	9999999	0	12M Fac/AP			0 2602001	100	P	26-Feb-16	Active	10-Mar-16	
2	Arce	Carol	9999999	0	USPS NonEx	17.4973		0 2602001	100	P	15-Jan-16	Leave W/Py	10-Mar-16	
3	Ayala	Keven	9999999	0	12M Fac/AP			0 2602001	100	P	23-Nov-15	Active	10-Mar-16	

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), 4-9 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.
Status:	Current Payroll Status (Active, Work Break, Leave w/Pay, etc.)
OSP Ben Elig Ind:	For OPS and part time employees, shows eligibility for Health Insurance benefits.

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 screenshot shows the 'Dept Leave Report' process page. At the top, a breadcrumb trail reads: Favorites > Main Menu > HR Custom > HR Report > Payroll > Departmental Leave Report. Below this is the UCF logo. The page title is 'Dept Leave Report'. There are two tabs: 'Run Control ID Audit' and 'Report Manager Process Monitor'. A 'Run' button is located to the right of the 'Report Manager Process Monitor' tab. The main heading is 'Departmental Leave Report For The New Pay Period'. Below this, there are two date fields: '*Pay Begin Date: 02/26/2016' and 'Pay End Date: 03/10/2016'. There are search icons next to both date fields. Below the dates, there are two input fields: 'Group: 0260' and 'Workgroup: OPSH'. Both fields have search icons. To the right of the 'Group' field, the text 'Human Resources' is displayed. Below the input fields, there is a note: 'Leave Group blank to select all groups.' At the bottom of the page, there are five buttons: 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

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

University of Central Florida										
Report ID: CFPAY490			Department of Human Resources					Page No. 1		
			Departmental Leave Report					Run Date: 03/21/2016		
			For Pay Period Ending: 03/10/2016					Run Time: 13:01:01		
			Group: 0260-Human Resources							
<u>Name</u>	<u>EmplID</u>	<u>Rcd#</u>	<u>Type</u>		<u>Old Balance</u>	<u>Hours Adjusted</u>	<u>Hours Used</u>	<u>Hours Earned</u>	<u>New Balance</u>	<u>Balance In Days</u>
Anderson, Benton S	1552500	0	A&P	Annual:	238.92	0.00	0.00	6.77	245.69	30.71
				Reg Sick:	639.30	0.00	0.00	4.00	643.30	80.41
				Pre-73 Sick:	0.00	0.00	0.00	0.00	0.00	0.00
				Sick Lv Pool:	0.00	0.00	0.00	0.00	0.00	0.00
Arce, Carol	1744840	0	USPS	Annual:	35.91	0.00	0.00	6.00	41.91	5.24
				Reg Sick:	4.45	0.00	4.00	4.00	4.45	0.56
				Pre-73 Sick:	0.00	0.00	0.00	0.00	0.00	0.00
				Spc1 Comp:	0.00	0.00	0.00	0.00	0.00	0.00
				OT Comp:	0.12	0.00	0.00	0.00	0.12	0.02
				Personal:	8.00	0.00	8.00	0.00	0.00	0.00

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 screenshot shows the 'Employee Time Shts' process page. At the top, there is a navigation breadcrumb: Favorites > Main Menu > HR Custom > HR Report > Payroll > Employee Timesheets. Below this is the UCF logo. The page title is 'Employee Time Shts'. There are two tabs: 'Run Control ID Blank2' and 'Report Manager Process Monitor'. A 'Run' button is located to the right of the 'Report Manager Process Monitor' tab. The main form area is titled 'Employee Time Sheet'. It contains the following fields and controls:

- *Pay Begin Date: 03/25/2016 (with a search icon)
- Pay End Date: 04/07/2016
- Blank timesheet?: ☐
- Group: 0260 (with a search icon) and Human Resources
- Workgroup: APF (with a search icon)
- Empl ID: (empty field)
- Empl Record: 0
- Text below Empl Record: If multiple Empl Rcd# exist for this employee, enter the correct Empl Rcd#

At the bottom of the form, there are three buttons: 'Save', 'Return to Search', and 'Add'. To the right of the 'Add' button is an 'Update/Display' button.

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 Rcd Nbr**.

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

Sample Employee Timesheet Reports

cfpay486_62570978.pdf - Adobe Acrobat Pro

File Edit View Window Help

Create

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Tools Comment

University of Central Florida
Employee Time Sheet

PP Begin: 11/23/2012 PP End: 12/06/2012

Lewis, Ashley ID: 0769251 Empl Rcd#: 0 Work Group: USNEX Group: 0260

Primary Department: 02602001

	Fri 11/23	Sat 11/24	Sun 11/25	Mon 11/26	Tue 11/27	Wed 11/28	Thu 11/29	Fri 11/30	Sat 12/01	Sun 12/02	Mon 12/03	Tue 12/04	Wed 12/05	Thu 12/06
In														
Out														
In														
Out														
In														
Out														
In														
Out														
Total Hrs														
Total Hours Worked Week 1:							Total Hours Worked Week 2:							

Leave and Pay Exceptions Report Attached? ☐ Yes ☐ No

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>Leave and Pay Exception Report

Process Page

Leave and Pay Exception Report

Run Control ID Blank2 Report Manager Process Monitor Run

Leave and Pay Exceptions Report for New Pay Period

*Pay Begin Date: 02/26/2016 Pay End Date: 03/10/2016

Group: 0260 Human Resources

Workgroup: APF

Empl ID: Select? ☐

Check the Select? box for the appropriate employee record.

Save Return to Search Add Update/Display

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

LAPERA.pdf - Adobe Acrobat Pro

File Edit View Window Help

Create

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Tools Comment

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

Print date: 11/21/2012

Rodriguez, Christopher ID: 8461538 Empl Rcd#: 0 Work Grp: APF Group: 0260

Primary Department: 02602001

Prior Pay Period - Begin: 10/12/2012 End: 10/25/2012					
Old Leave Balances:	Annual:	183.48	Reg Sick:	466.30	Pre-73 Sick: 0.00
Used:		0.00		0.00	Sick Lv Pool: 0.00
Adjusted:		0.00		0.00	0.00
Earned:		0.00		0.00	0.00
New Leave Balances:		183.48		466.30	0.00

Current Pay Period - Begin: 10/26/2012 End: 11/08/2012

	Sched Hours	*Actual Hrs
Week 1 Total	40.00	
Week 2 Total	40.00	

Enter Biweekly On-call Amount:
 \$ _____

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

Leave Type	Show Leave Used for Week 1 Below								Show Leave Used for Week 2 Below							
	Fri 10/26	Sat 10/27	Sun 10/28	Mon 10/29	Tue 10/30	Wed 10/31	Thu 11/01	Wk 1 Total	Fri 11/02	Sat 11/03	Sun 11/04	Mon 11/05	Tue 11/06	Wed 11/07	Thu 11/08	Wk 2 Total