Procedure Manual
PeopleSoft Version 9.2

Running Processes and Reports

Revised: January 10, 2018

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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.

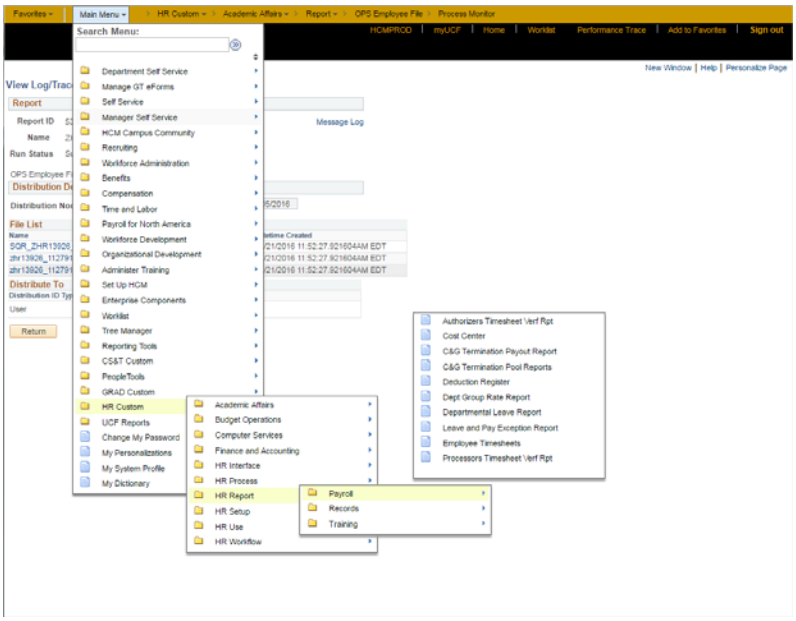
1. Open the process/report page using the applicable navigation.
2. Add or select a Run Control ID.
3. Populate the process/report page.
4. Click the run icon.
5. Populate Process Scheduler Request page.
6. Check the process status using the Process Monitor.
7. Review process/report output online or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

Run Control ID

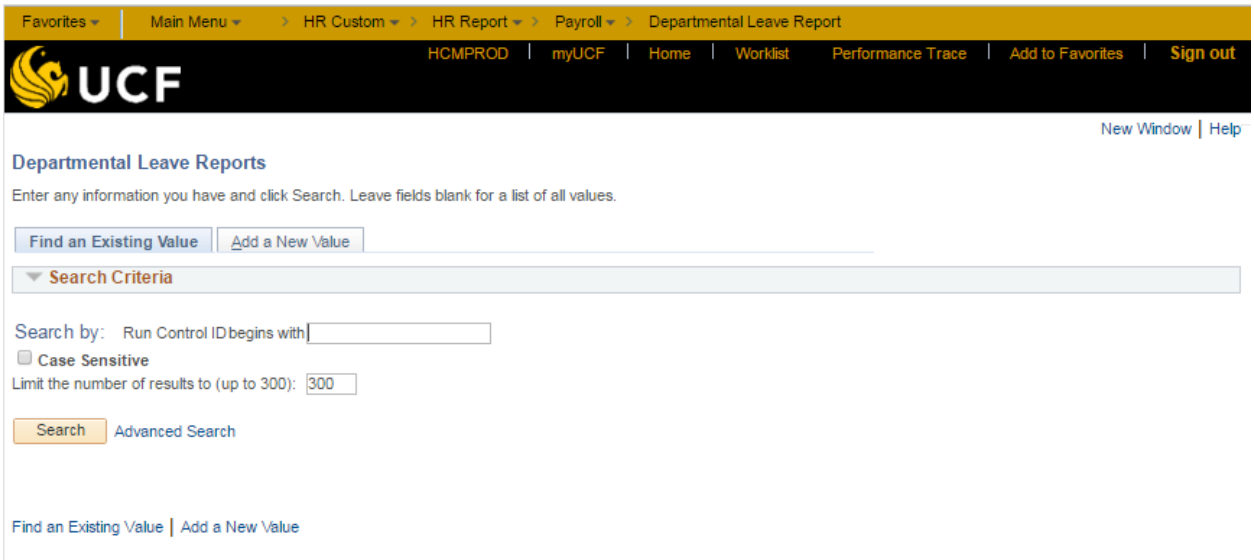
The first time a process/report is run in PeopleSoft, a Run Control ID must be established. The Run Control ID is simply an identifier so that PeopleSoft can recognize which process/report is being run. The first time a process/report is run, the following must take place:

- 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)

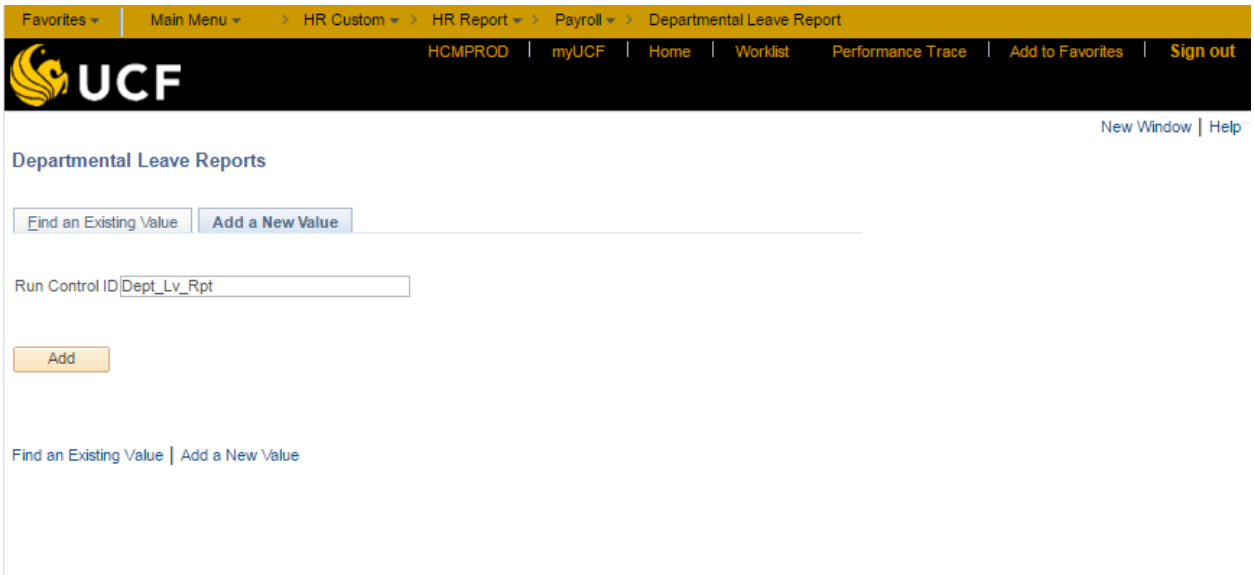
Using the Departmental Leave Reports as an example, the following window will display.



The Run Contril 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.

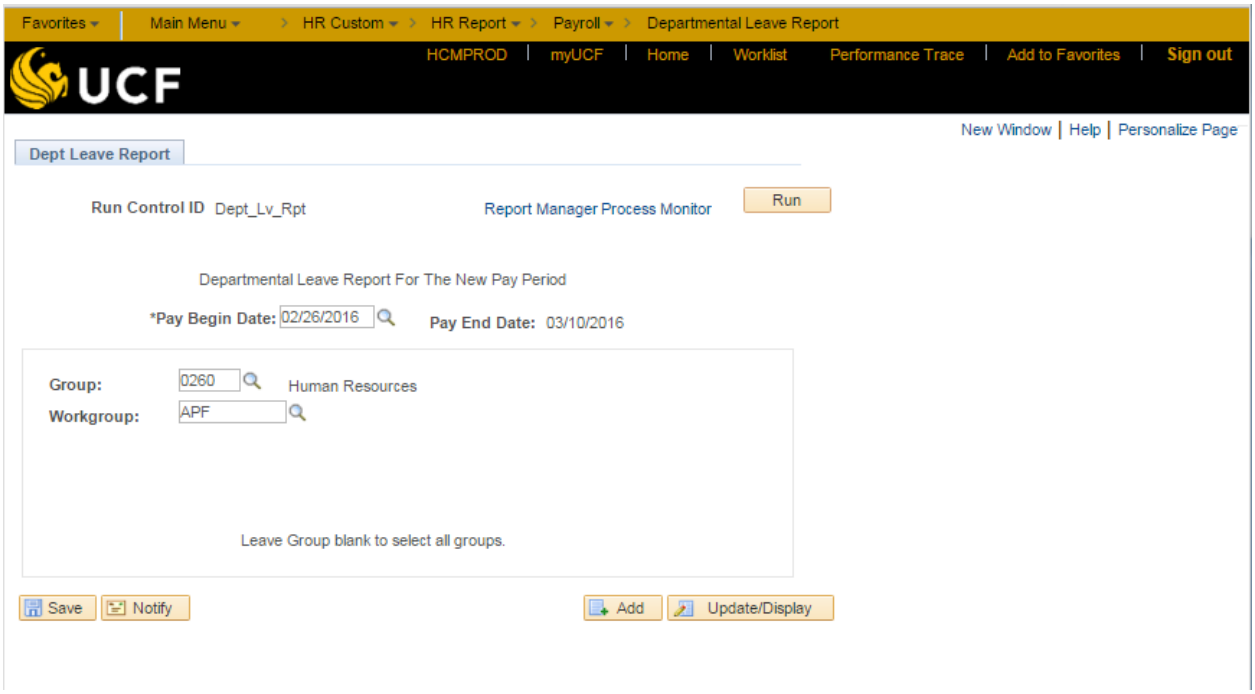


Enter a name that meets your needs best. In the example below, the process is named 'Dept_Lv_Rpt.' Do not use special characters in the name. Only letters, numbers, and the underscore character should be used. Click on **Add**.



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

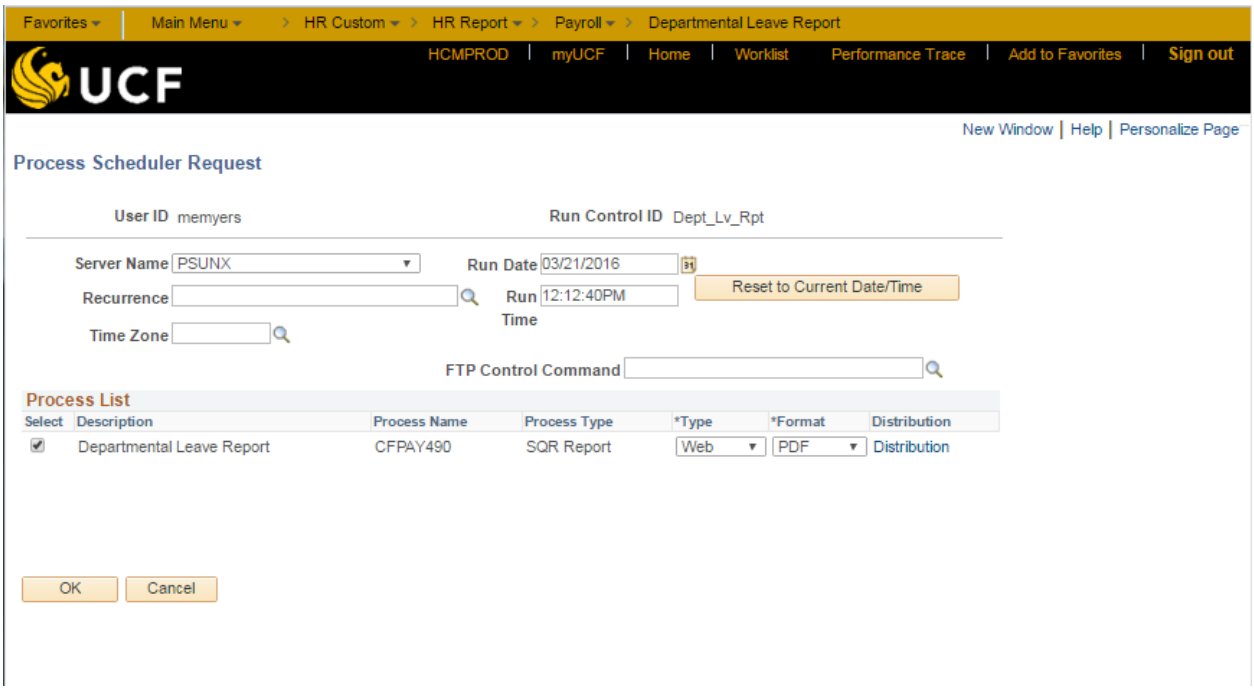


Complete all required fields. Each report is different and some reports will not have any input required.

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.

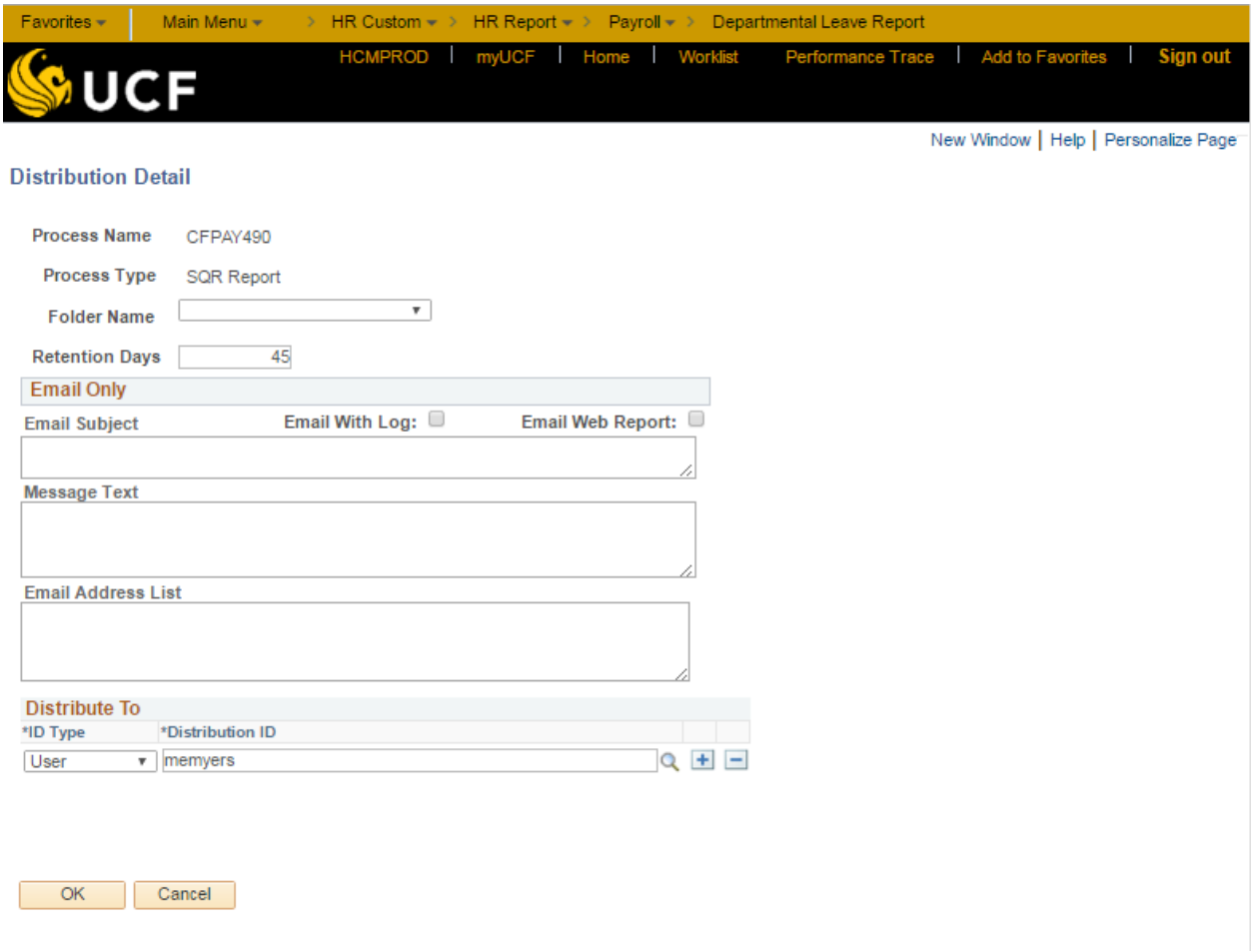
Populate the window as follows:

1. **Server Name**: Select server, PSUNX.

2. **Type**: To view the process/report output online, select Web 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.



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.

5. Click the **OK** button.

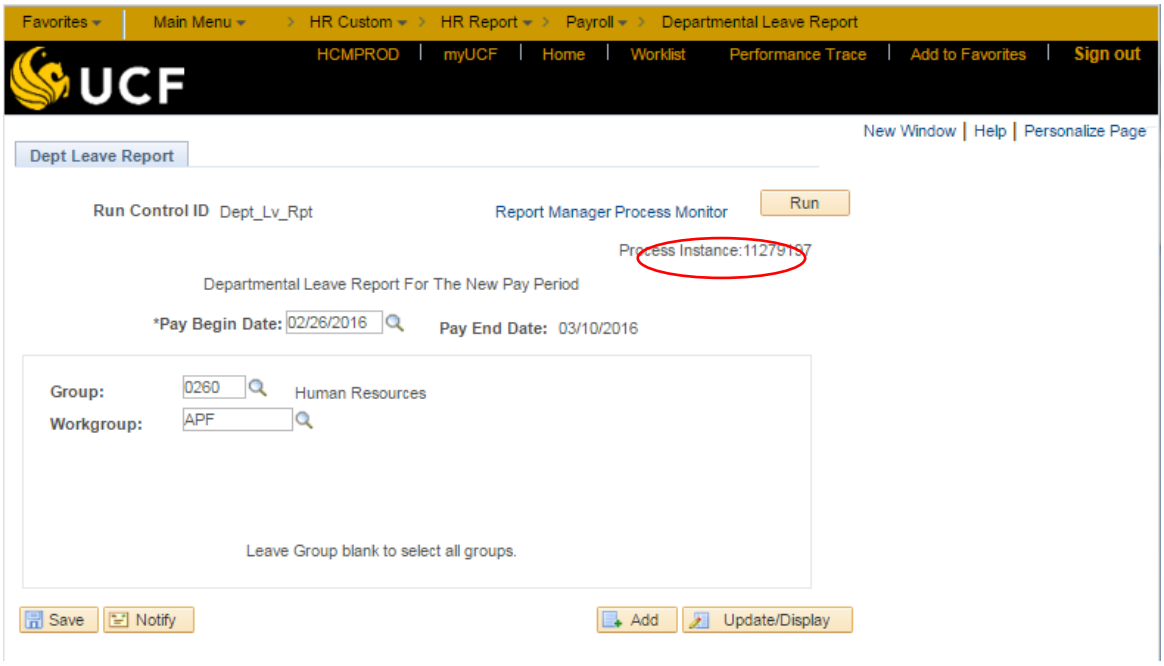
The status of the process/report must be checked in the Process Monitor.

STOP

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

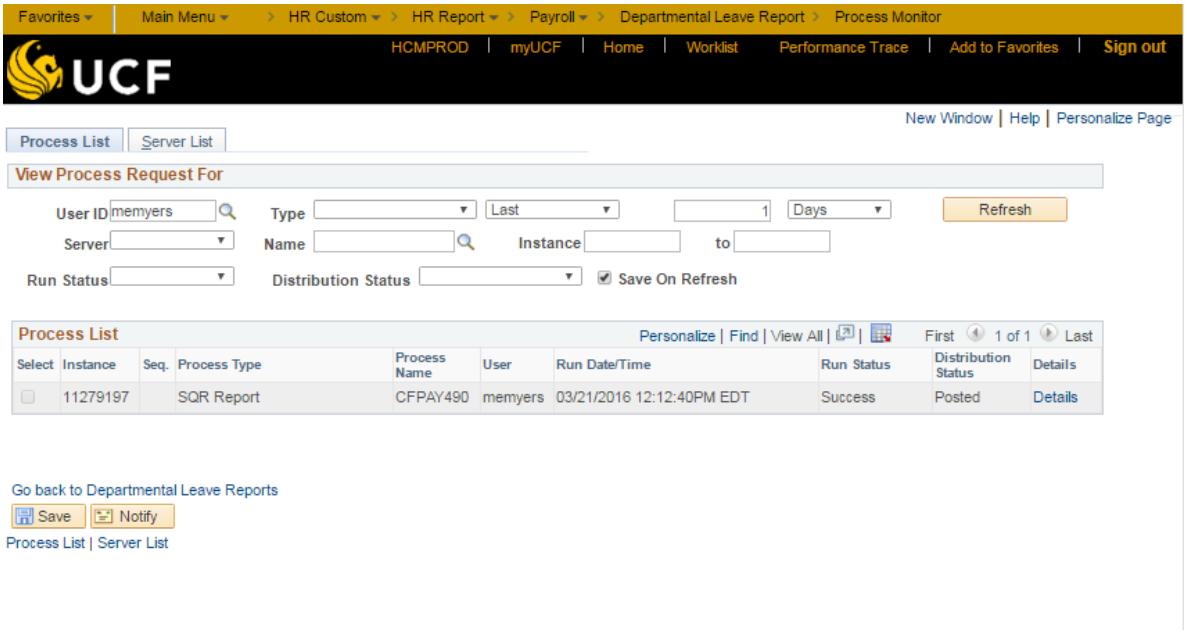
Process Monitor

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.



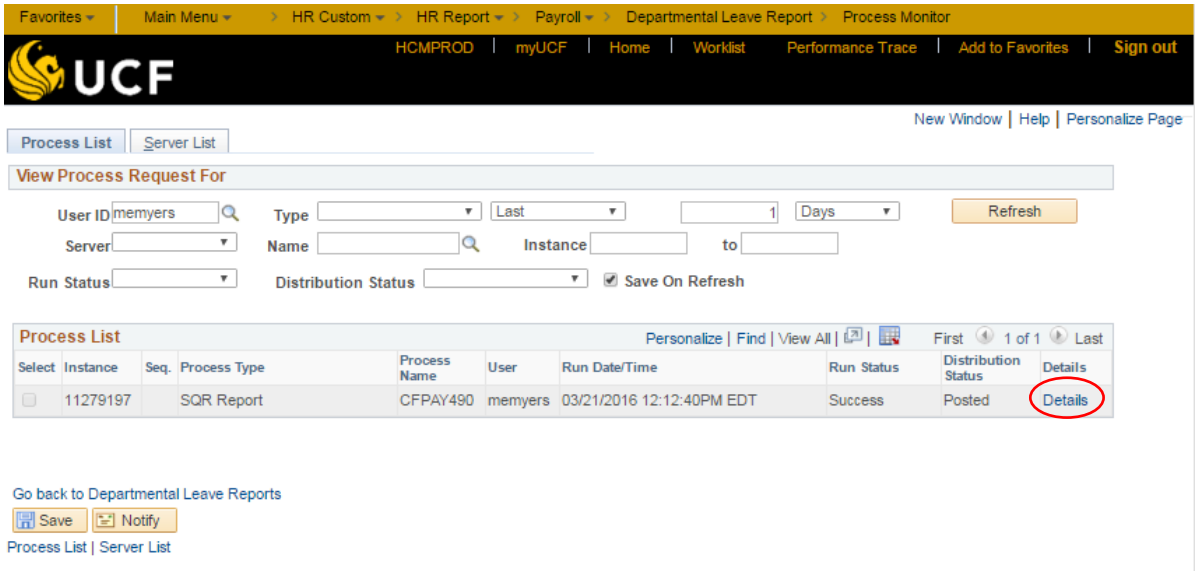
This panel displays necessary information such as the process/report being run, the instance number, the run date and time, along with the status. If at any time the Run Status displayed is Error, email HRIS for further assistance. It is important to make note of the process name, run date/time, and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

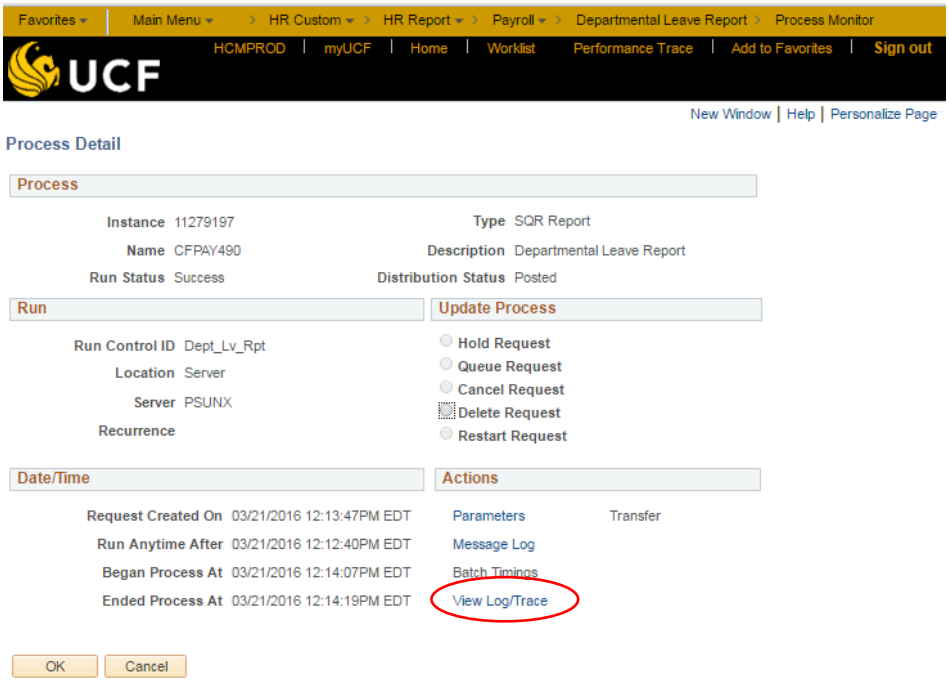
Reviewing Process/Report Online

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



The following page will display.

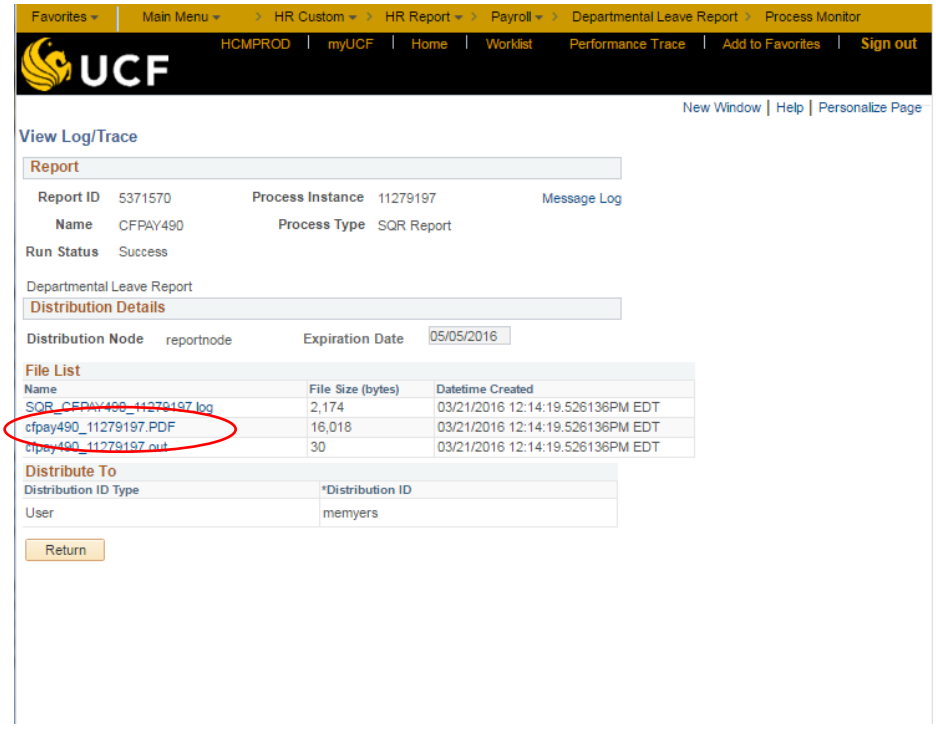
Process Detail Page



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

The following page will display.

Report/Log Viewer

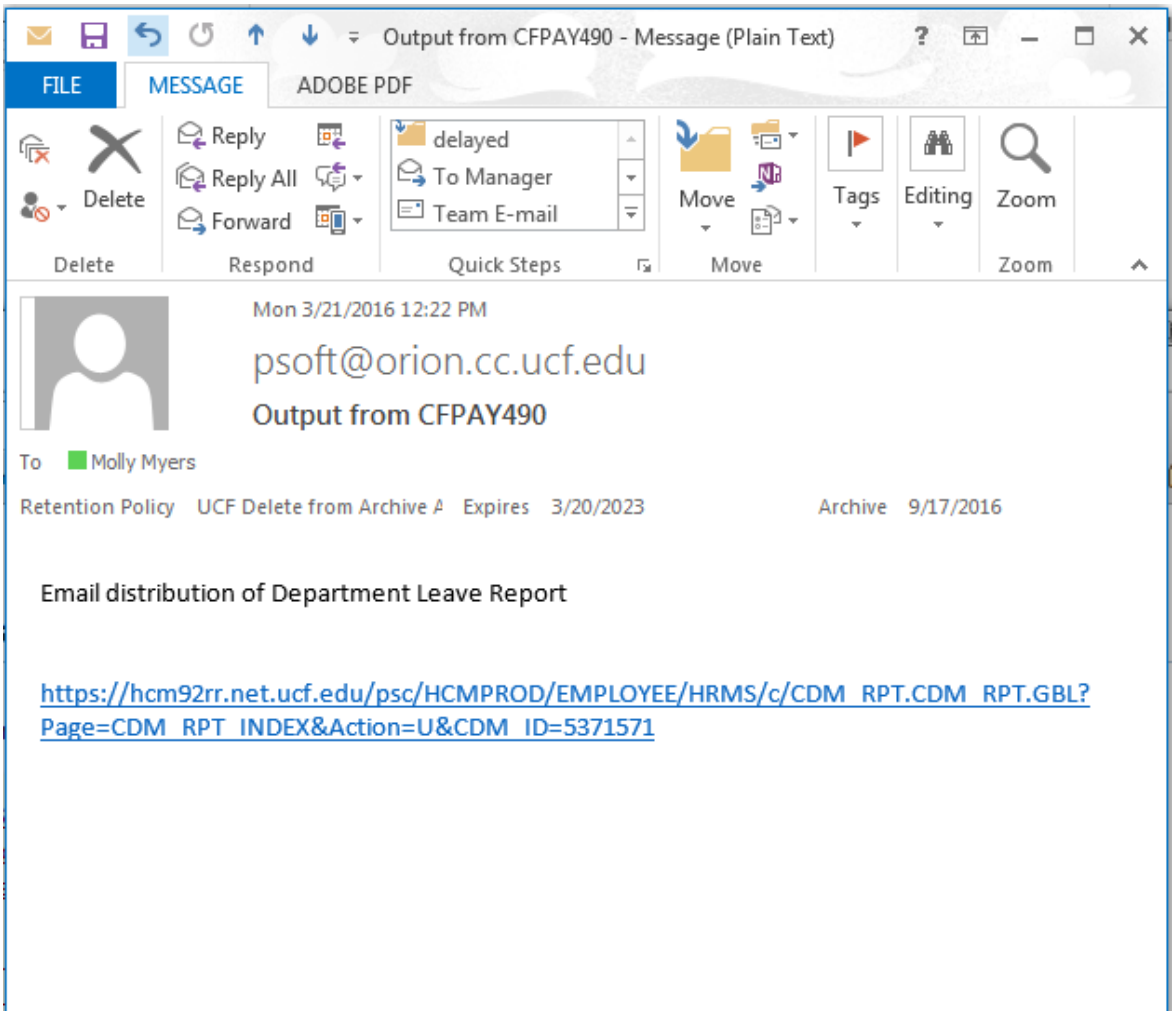


To view the report, click on the link that contains the process name. In this example, the process name is cfpay490 (circled above).

The report will now display.

Reviewing the Process/Report via Email

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.

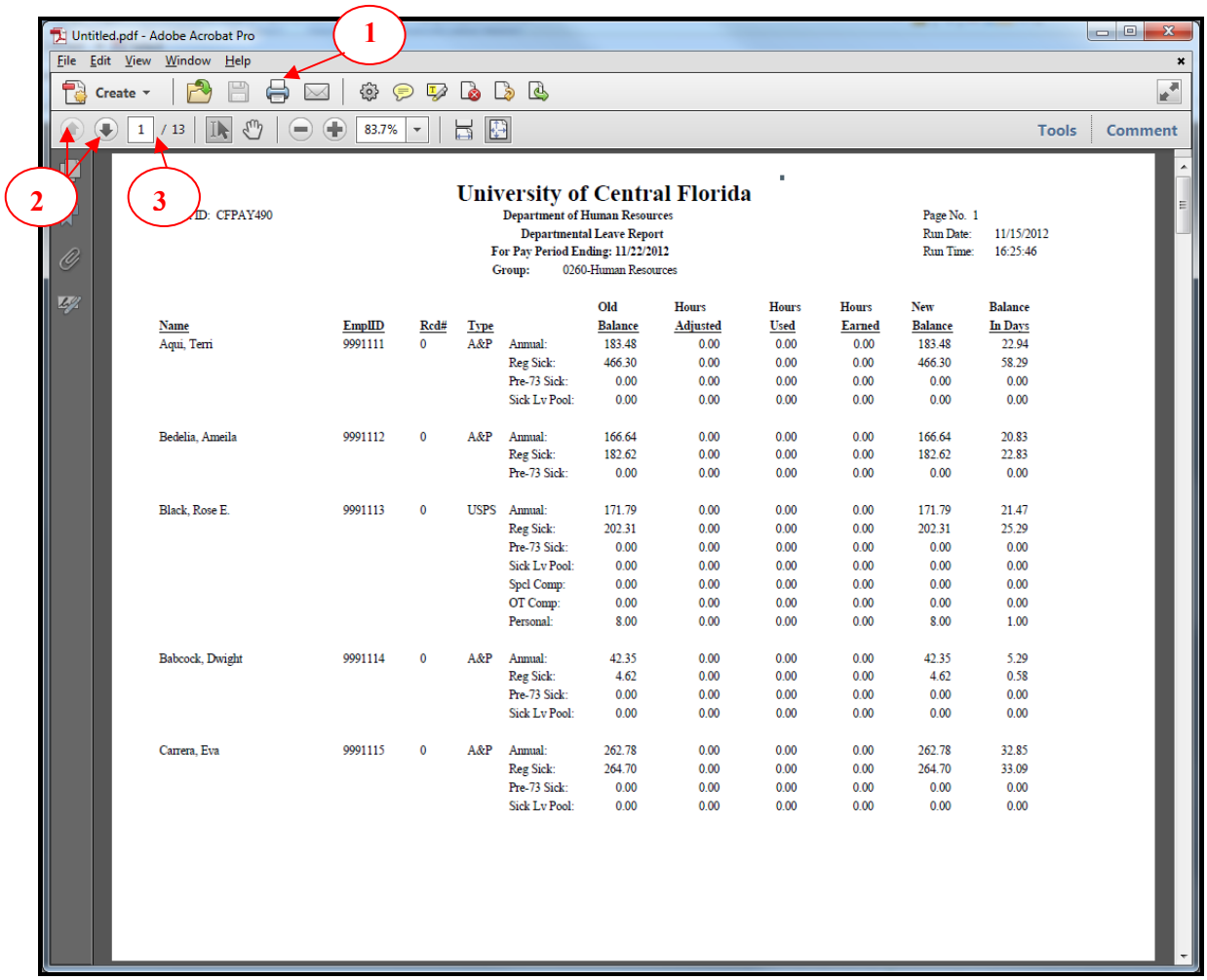


To view the report, click on the link that contains the process name.

The report will now display.

Viewing and Printing Process/Report Output in PDF

The process/report will display in Adobe Reader.



Name	EmplID	Rcd#	Type		Old Balance	Hours Adjusted	Hours Used	Hours Earned	New Balance	Balance In Days
Aqui, Terri	9991111	0	A&P	Annual:	183.48	0.00	0.00	0.00	183.48	22.94
				Reg Sick:	466.30	0.00	0.00	0.00	466.30	58.29
				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
Bedelia, Ameila	9991112	0	A&P	Annual:	166.64	0.00	0.00	0.00	166.64	20.83
				Reg Sick:	182.62	0.00	0.00	0.00	182.62	22.83
				Pre-73 Sick:	0.00	0.00	0.00	0.00	0.00	0.00
Black, Rose E.	9991113	0	USPS	Annual:	171.79	0.00	0.00	0.00	171.79	21.47
				Reg Sick:	202.31	0.00	0.00	0.00	202.31	25.29
				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
				Spcl Comp:	0.00	0.00	0.00	0.00	0.00	0.00
				OT Comp:	0.00	0.00	0.00	0.00	0.00	0.00
				Personal:	8.00	0.00	0.00	0.00	8.00	1.00
Babcock, Dwight	9991114	0	A&P	Annual:	42.35	0.00	0.00	0.00	42.35	5.29
				Reg Sick:	4.62	0.00	0.00	0.00	4.62	0.58
				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
Carrera, Eva	9991115	0	A&P	Annual:	262.78	0.00	0.00	0.00	262.78	32.85
				Reg Sick:	264.70	0.00	0.00	0.00	264.70	33.09
				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

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.

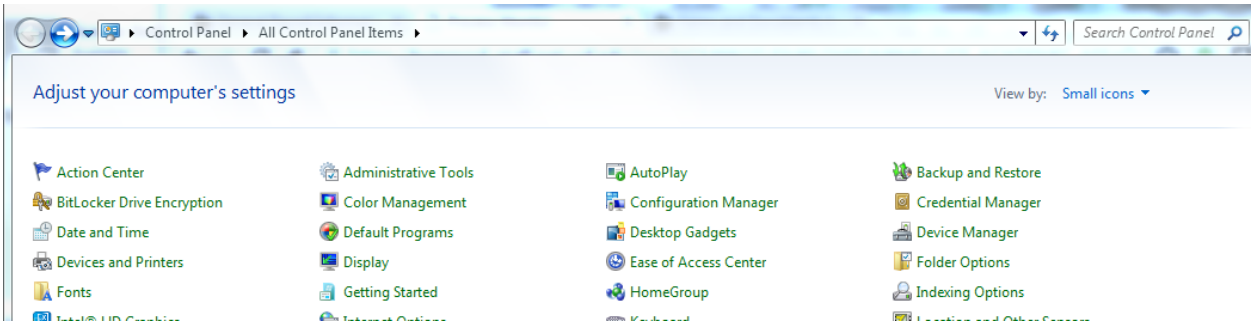
3. The number of pages in the report is displayed here.

Opening Process/Report Output Data File in CSV

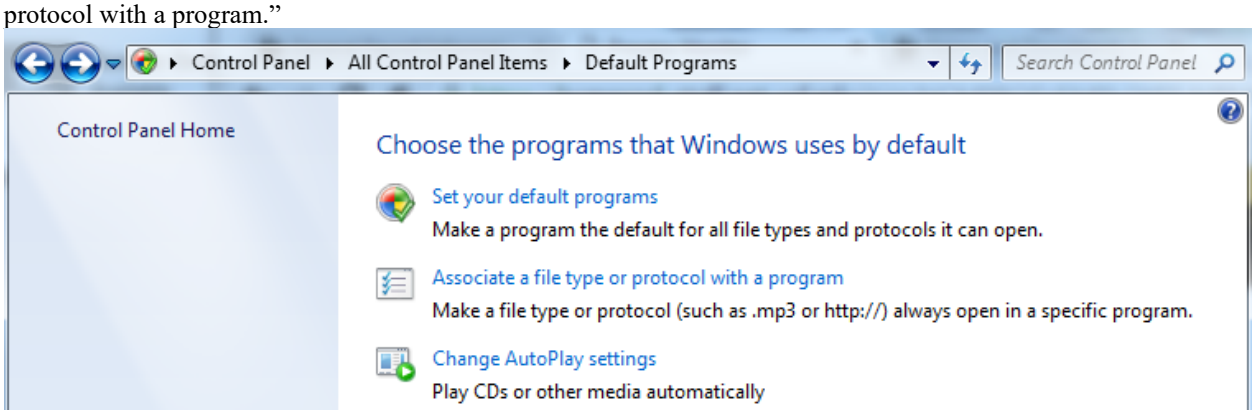
Some processes/reports include a data file in CSV format. The recommended program to use for opening CSV files is Microsoft Excel. To ensure optimal results, set your computer's default program for CSV files to Microsoft Excel before attempting to download and use any of these files.

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

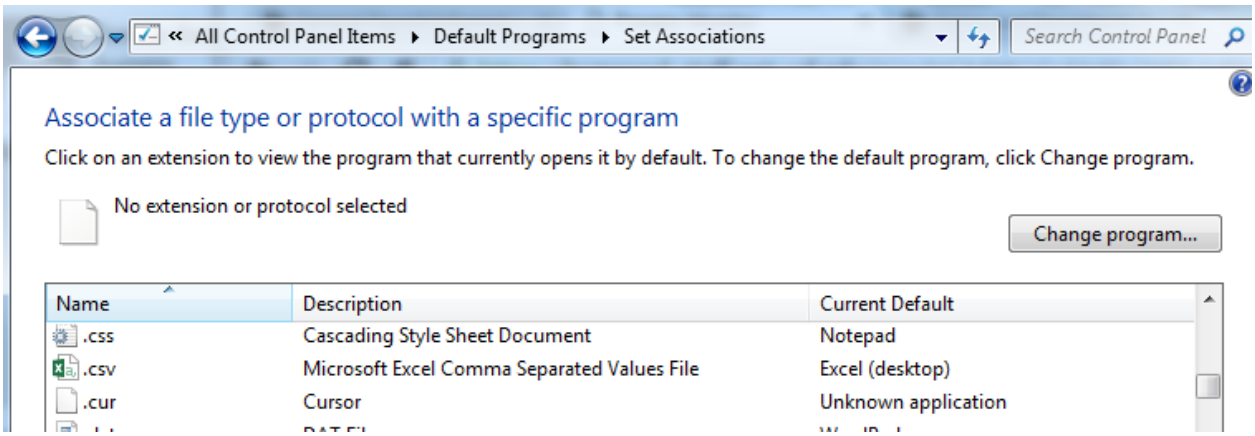
Via the Start button on your computer, select the Control Panel, and Default Programs.



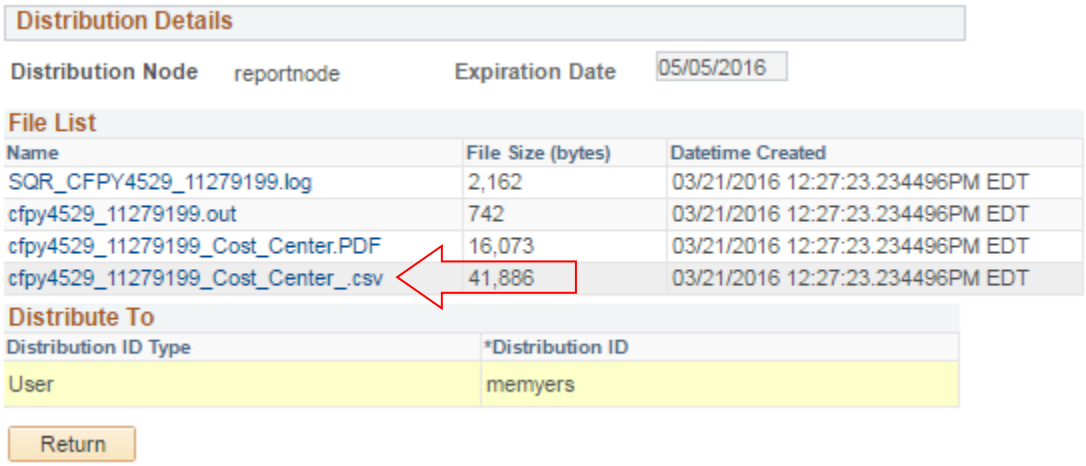
From there, ensure that the file type is associated with the correct program by selecting "Associate a file type or protocol with a program."

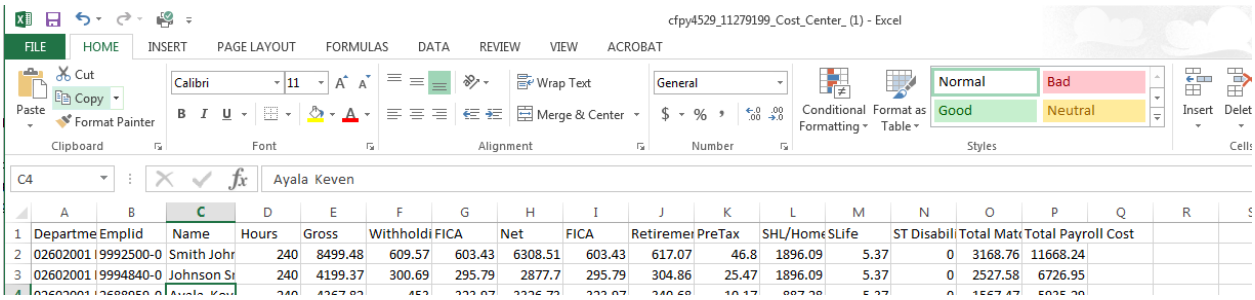


Locate the .csv (Microsoft Excel Comma Separated Values File) format, and ensure that Excel is selected as the current default.



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.





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

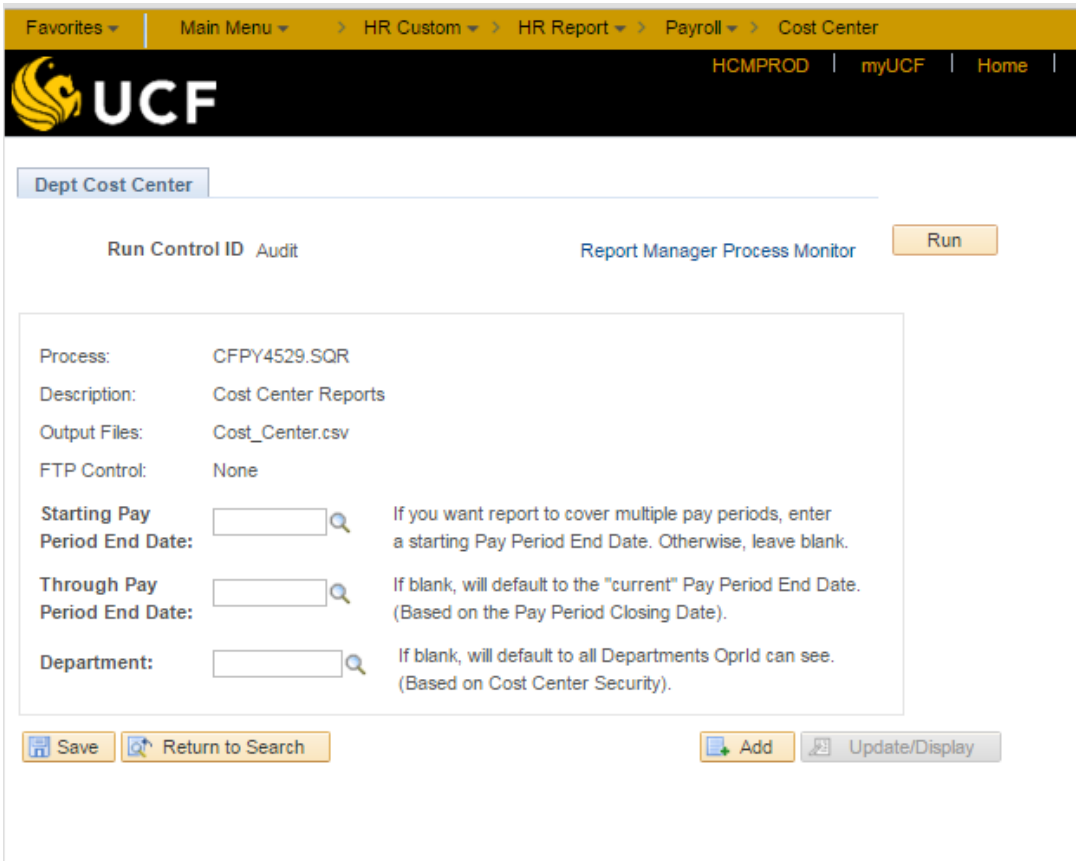
Due to the Composite Fringe Benefit Rate project implementation, information displayed in the report as of paydate 08/04/2017 and after includes values for the following:

- 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



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.

Sample Cost Center PDF Report

University of Central Florida

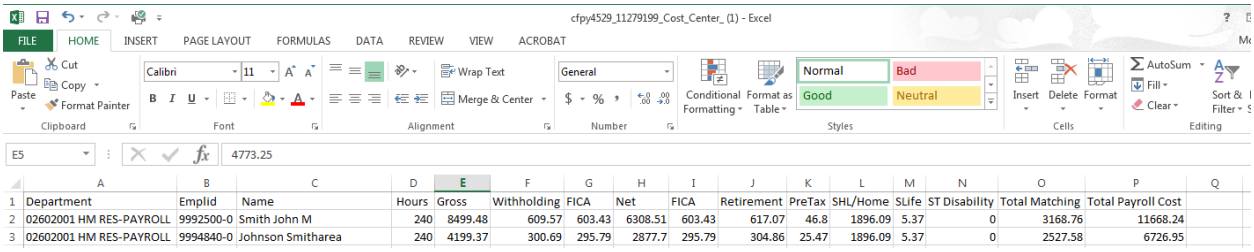
Report ID: CFPY4529
Dept# 02602001 HM RES-PAYROLL
Pay Period End: 01/13/2005 Thru 01/27/2005

Department of Human Resources
PS HR - Department Cost Center Report

Page No. 2
Run Date: 03/21/2016
Run Time: 12:50:09

EMPLID	Temporary/OPS Name	Account #	Hours	712XXX Gross	Witholding	FICA	Net	712301 FICA	Retirement	Matching 712551 PreTax	712604 SHL/Home	SLife	Disability	Total Matching	Gross + Match Total Payroll
0762282-4	Boerio, Diana		72.25	872.06	49.90	11.70	745.06	11.70	0.00	0.00	0.00	0.00	0.00	11.70	883.76
1745461-4	Davis, Tina E		146.00	1,762.22	113.94	23.63	1,492.48	23.63	0.00	0.00	0.00	0.00	0.00	23.63	1,785.85
0753698-4	Gajentan, Katrina H		44.50	333.75	12.99	0.00	320.76	0.00	0.00	0.00	0.00	0.00	0.00	0.00	333.75
1046620-5	Hamza-Lup, Nicoleta		50.00	500.00	3.17	6.70	452.63	6.70	0.00	0.00	0.00	0.00	0.00	6.70	506.70
0858585-5	Henry, Patrice M		134.50	1,271.03	118.28	17.05	1,040.37	17.05	0.00	0.00	0.00	0.00	0.00	17.05	1,288.08
0783765-4	Holloway, Latoya L		83.25	638.82	6.56	8.57	575.78	8.57	0.00	0.00	0.00	0.00	0.00	8.57	647.39
1063876-4	Miller, Amanda G		47.00	352.50	0.75	0.00	351.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	352.50
0371349-4	Washington, Janice		144.00	1,539.36	119.36	20.65	1,283.90	20.65	0.00	0.00	0.00	0.00	0.00	20.65	1,560.01
Total	Temporary/OPS		721.50	7,269.74	424.95	88.30	6,262.73	88.30	0.00	0.00	0.00	0.00	0.00	88.30	7,358.04
Dept# 02602001 Total A&P, Faculty, USPS, Temporary/OPS			6,307.25	114,913.98	11,286.51	7,969.38	84,400.47	7,969.38	9,136.31	357.43	15,790.74	211.09	0.00	33,464.95	148,378.93

Sample Cost Center CSV Data File



cfpy4529_11279199_Cost_Center_ (1) - Excel

E5 | 4773.25

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Department	Emplid	Name	Hours	Gross	Withholding	FICA	Net	FICA	Retirement	PreTax	SHL/Home	SLife	ST Disability	Total Matching	Total Payroll Cost	
2	02602001 HM RES-PAYROLL	9992500-0	Smith John M	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 HM RES-PAYROLL	9994840-0	Johnson Smitharea	240	4199.37	300.69	295.79	2877.7	295.79	304.86	25.47	1896.09	5.37	0	2527.58	6726.95	

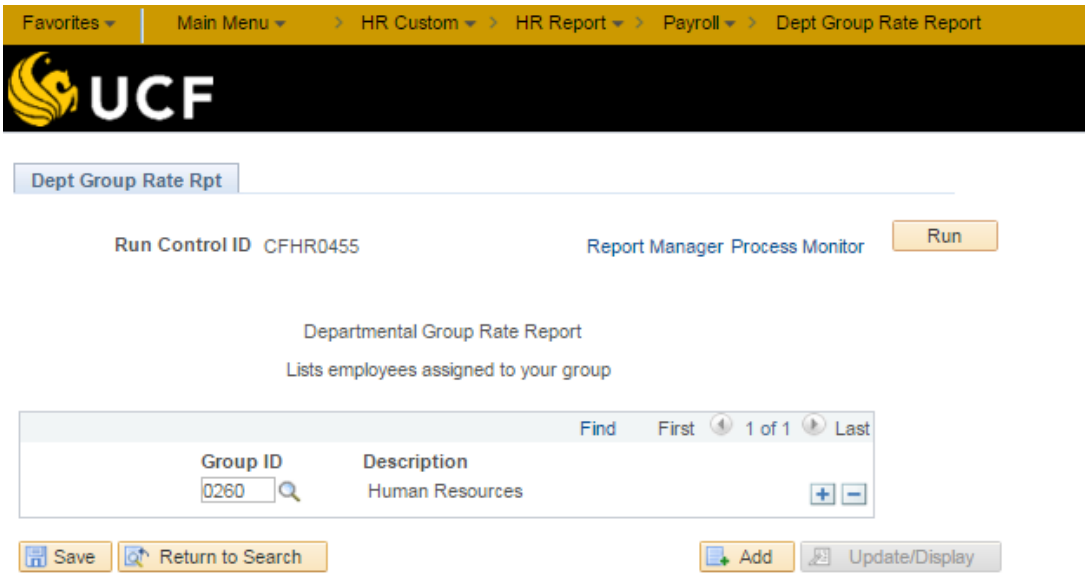
Department Group Rate Report

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



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

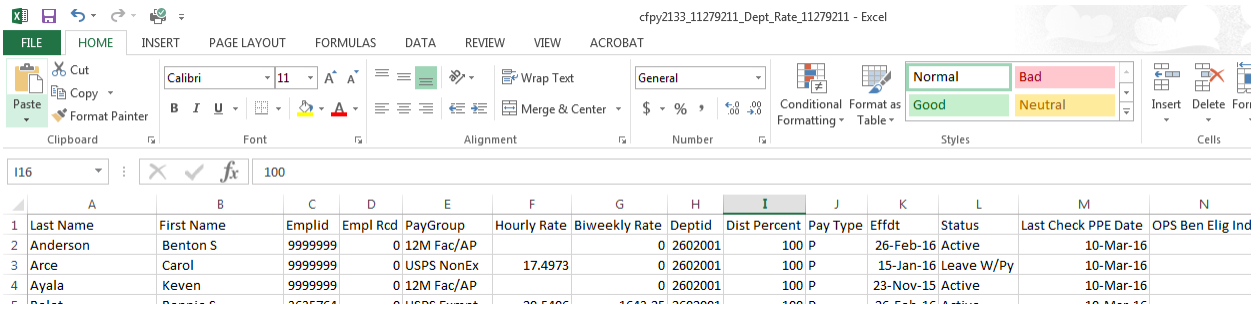
Department of Human Resources

Departmental Rate Report

Page No. 3
Run Date: 03/21/2016
Run Time: 12:51:40

Group: 0260 Human Resources

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, Lizbed	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	



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	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
2	Anderson	Benton S	9999999	0	12M Fac/AP		0	2602001	100	P	26-Feb-16	Active	10-Mar-16	
3	Arce	Carol	9999999	0	USPS NonEx	17.4973	0	2602001	100	P	15-Jan-16	Leave W/Py	10-Mar-16	
4	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.

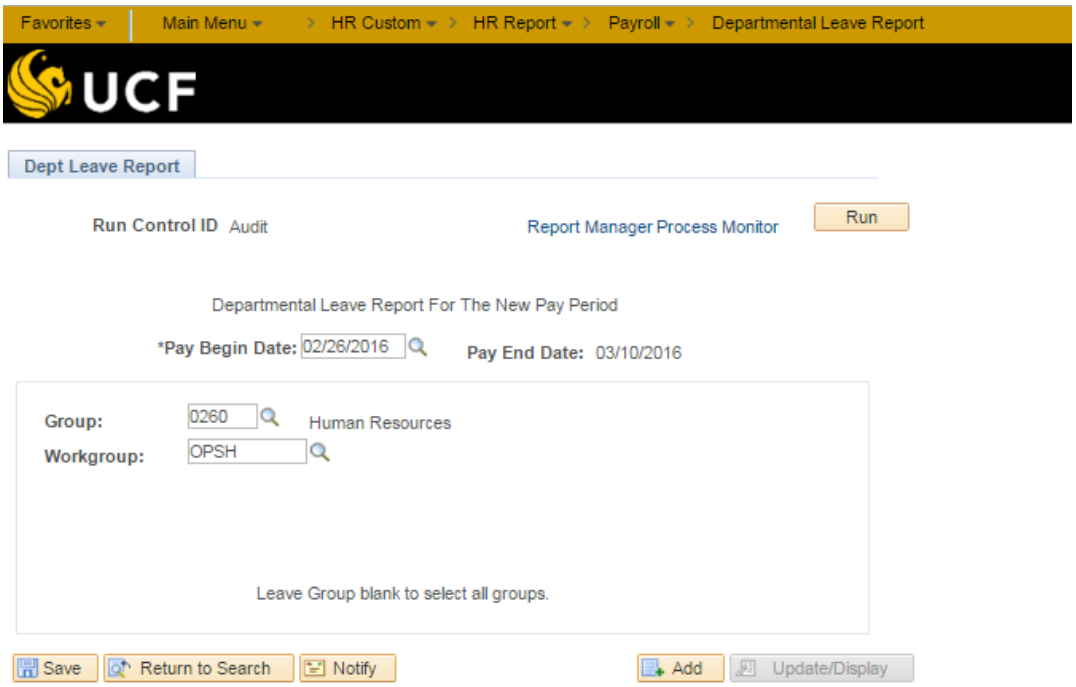
Departmental Leave Report

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 **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
Departmental Leave Report
For Pay Period Ending: 03/10/2016
Group: 0260-Human Resources

Page No. 1
Run Date: 03/21/2016
Run Time: 13:01:01

Name	EmplID	Rcd#	Type		Old Balance	Hours Adjusted	Hours Used	Hours Earned	New Balance	Balance In Days
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
				Spcl 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

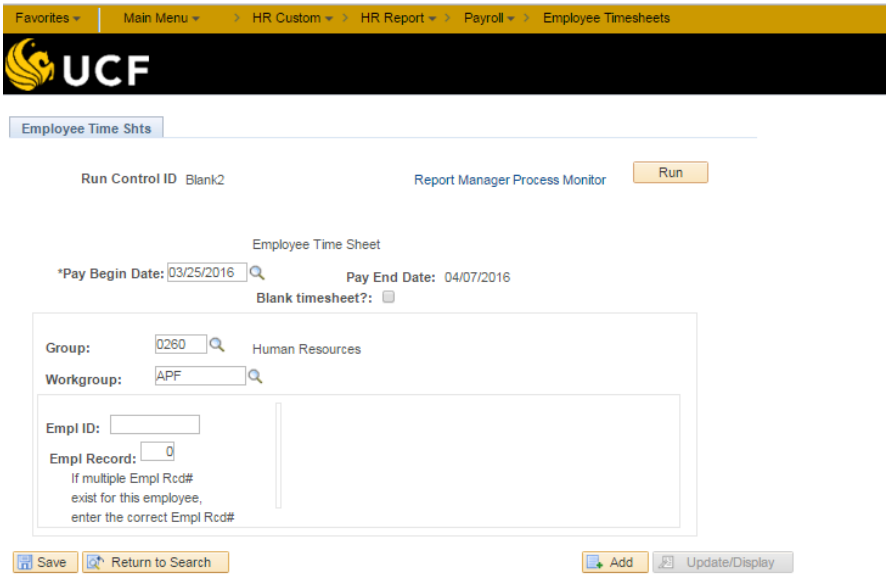
Employee Timesheets

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



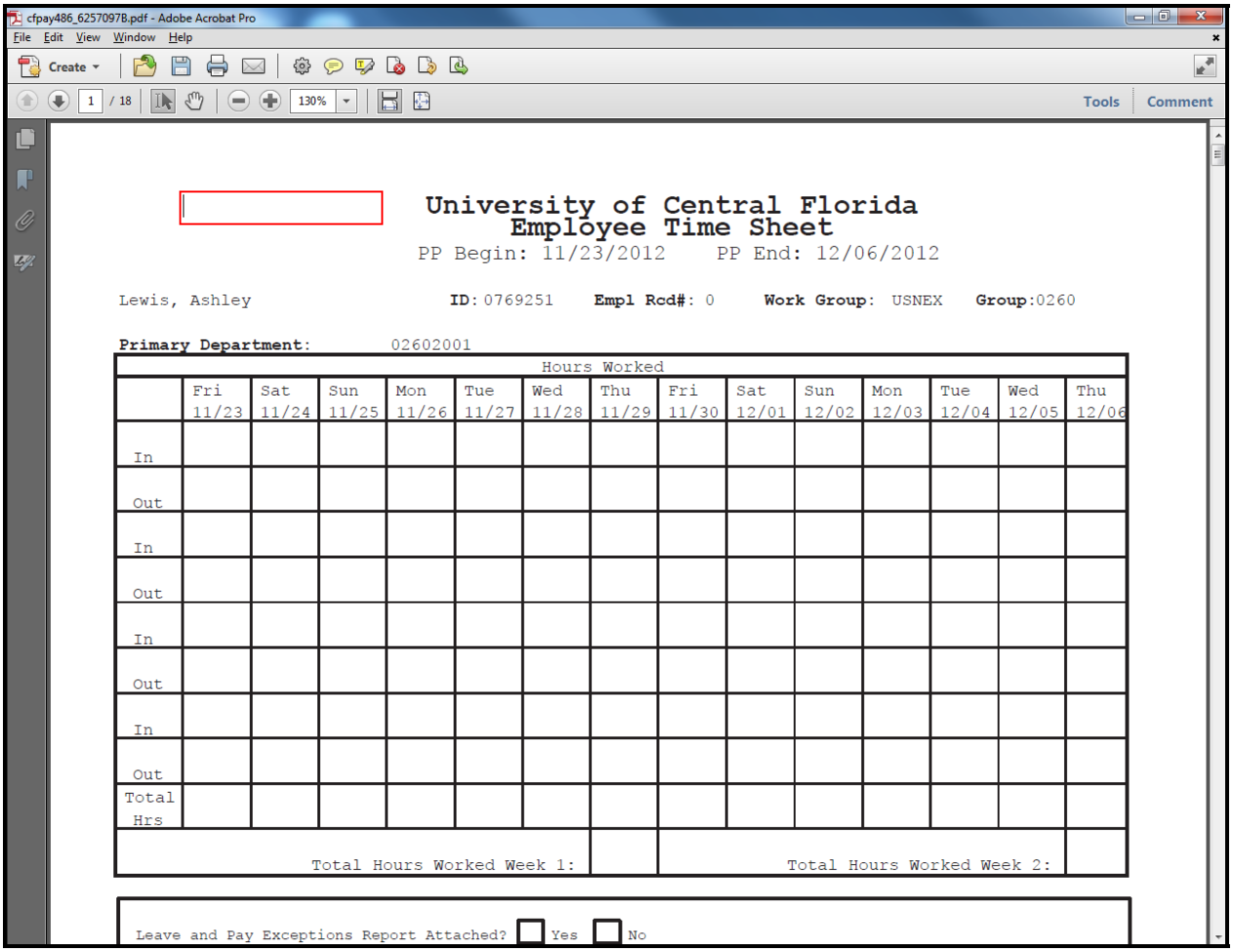
The **Pay Begin Date** will default to the begin date for the current pay period. If the report is being run for a pay period other than the current pay period, you will need to change the **Pay Begin Date** to the begin date for the pay period for which the report is being run. The **Pay End Date**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



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

	Hours Worked													
	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

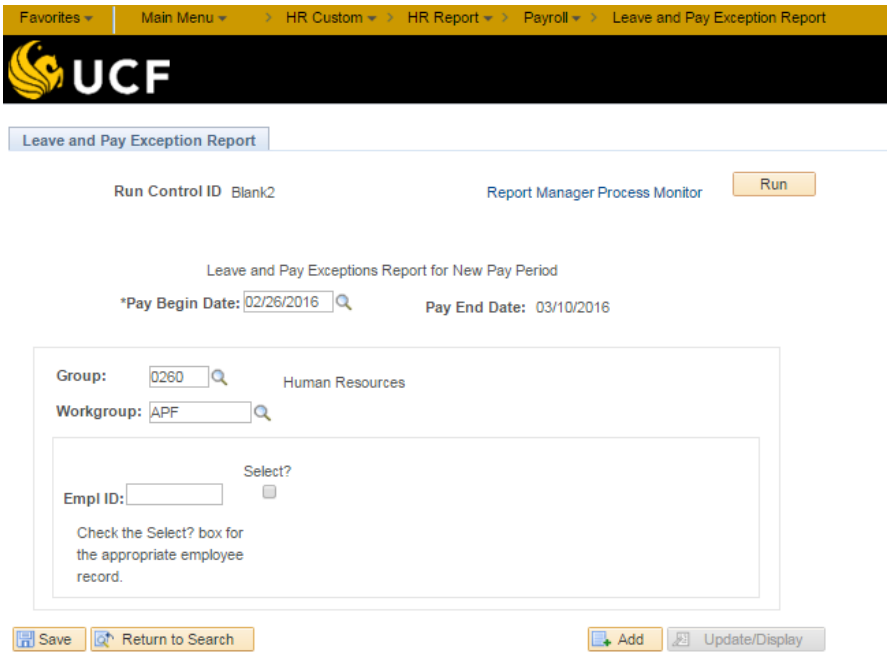
Employee Leave Reports

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



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

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	Sick Lv Pool: 0.00
Used:		0.00		0.00		0.00	0.00
Adjusted:		0.00		0.00		0.00	0.00
Earned:		0.00		0.00		0.00	0.00
New Leave Balances:		183.48		466.30		0.00	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

	Show Leave Used for Week 1 Below								Show Leave Used for Week 2 Below							
Leave Type	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