

PSHR Reports

Running a Program User Guide

9.2 PeopleSoft

HR Report Access – Running Program

This guide provides instructions on how to run a program that generates a report or spreadsheet from PeopleSoft.

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Use the Overview and detailed run instructions to get started.

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Once you are familiar with the process, try the quick click instructions for running the report.

Requesting User Access

To run a program you must have online security access to the PeopleSoft Reporting. Users who do not have the following reports can obtain them with supervisor's approval using the PeopleSoft information access authorization form found on Human Resources website under Forms:
<http://www.wmich.edu/hr/forms/access>

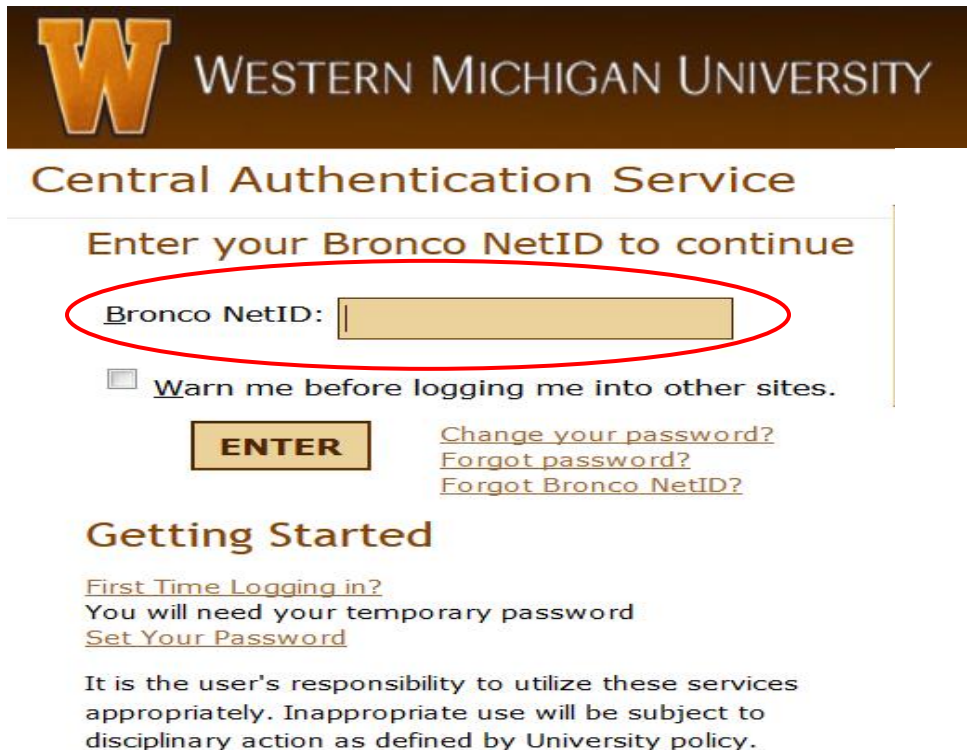
If you are unable to access the reports, or if you have questions regarding user access, please contact Human Resources at hr-hris@wmich.edu or (269) 387-3620. If questions or issues with the browser, contact the OIT Help Desk at 387-HELP.

Web Browser Requirements

PeopleSoft works best with Internet Explorer version 11. If you are using a Mac, the Safari browser works best but may work with Chrome.

Accessing the Reporting Panels

- 1) Log in through the GoWMU portal at <https://gowmu.wmich.edu/cp/home/displaylogin>
- 2) Enter your assigned User ID
- 3) 'Click' the 'Enter' button and then enter (your Bronco NetID) and password at the prompt.



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Central Authentication Service

Enter your Bronco NetID to continue

Bronco NetID:

Warn me before logging me into other sites.

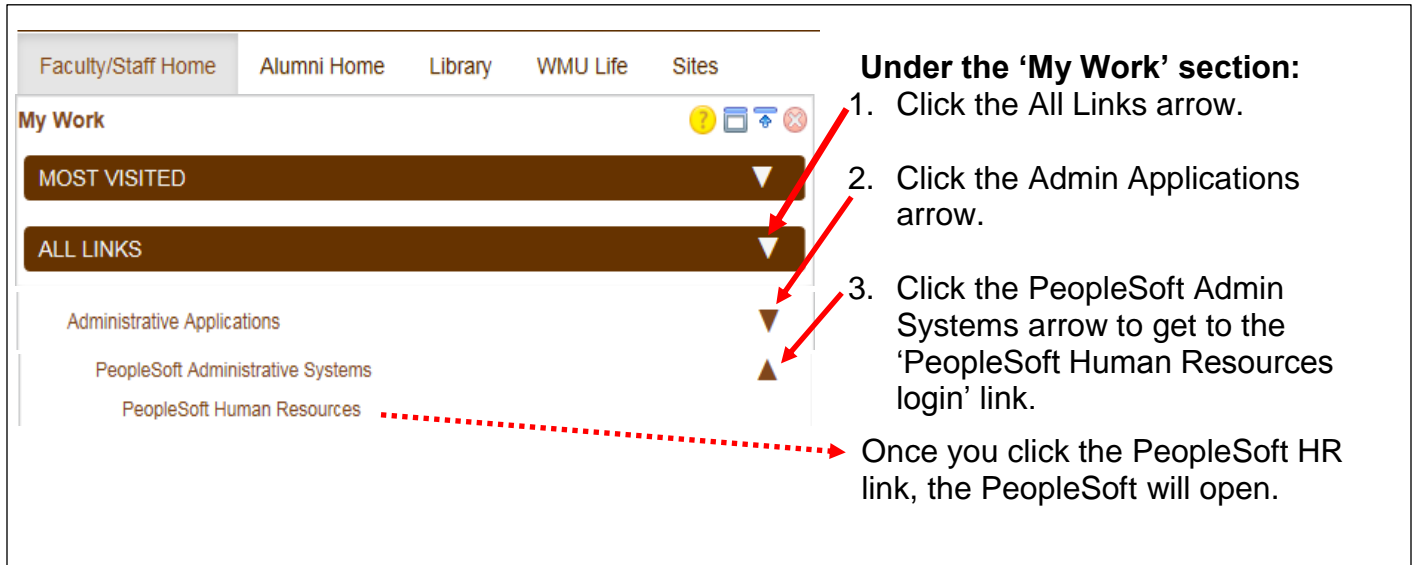
ENTER [Change your password?](#)
[Forgot password?](#)
[Forgot Bronco NetID?](#)

Getting Started

[First Time Logging in?](#)
You will need your temporary password
[Set Your Password](#)

It is the user's responsibility to utilize these services appropriately. Inappropriate use will be subject to disciplinary action as defined by University policy.

4) The GoWMU panel will open up. Once logged into GoWMU, you will see the Faculty/Staff Home Tab.



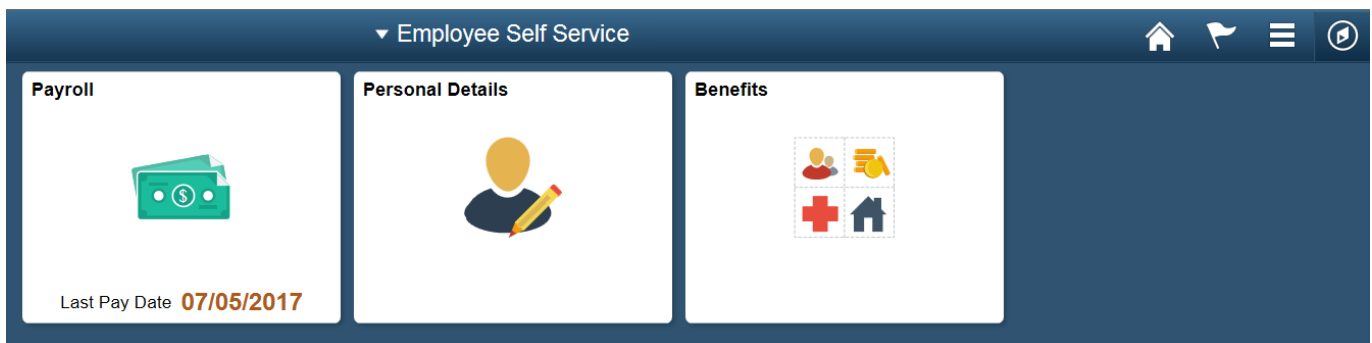
The screenshot shows the GoWMU Faculty/Staff Home page. At the top, there are navigation tabs: Faculty/Staff Home, Alumni Home, Library, WMU Life, and Sites. Below the tabs is the 'My Work' section, which includes a 'MOST VISITED' bar and an 'ALL LINKS' bar. Under the 'ALL LINKS' bar, there is a section for 'Administrative Applications' containing 'PeopleSoft Administrative Systems' and 'PeopleSoft Human Resources'. Red arrows point from the 'ALL LINKS' bar to the 'Administrative Applications' section, and from the 'PeopleSoft Human Resources' link to the text instructions on the right.





Under the 'My Work' section:

1. Click the All Links arrow.
2. Click the Admin Applications arrow.
3. Click the PeopleSoft Admin Systems arrow to get to the 'PeopleSoft Human Resources login' link.

Once you click the PeopleSoft HR link, the PeopleSoft will open.

5) The PeopleSoft page will open to the PeopleSoft Main Home Page



-  - Home – Click on this icon to return to the Main PeopleSoft Home page
-  - Notifications – Click on this icon to view actions and alerts
-  - Actions List – Click on this icon to Save Favorites and Sign Out
-  - Nav Bar – Click on this icon to navigate to certain menu items (formerly the Main Menu). It contains Recent Places, My Favorites, Payroll, Personal Details and Benefits.

6) Clicking the Nav Bar icon will display the drop down main menu listings:



7) Click on the Navigator icon to get to Reporting Tools.

8) Click on the Reporting Tools menu.

9) WMU Reporting, WMU- HR Reporting.

10) and WMU HR Reporting.

The Navigator menu opens



Running the Program

HR has created a unique Run Control ID that can be ran on demand per the department's needs. Each program has a different Run Control ID (which is also the designated report number) associated with it. Use the given Run Control ID/report number when following these instructions.

A) Log into PeopleSoft

- See **Accessing the Reporting Panels**.

B) Access the Reports - (For screen shots, see page 4.)

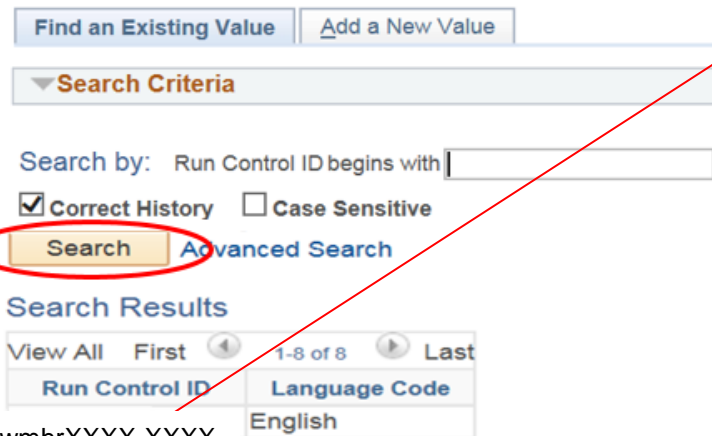
- 'Click' on Nav Bar icon  at the top right hand side of screen.
 - 'Click' on the Navigator menu item.
 - 'Click' on Reporting Tools
 - 'Click' on WMU Reporting
 - 'Click' on WMU-Human Resource Reporting
 - 'Click' on WMU –HR Reporting
- Optional- you can add this to My Favorites by clicking the  icon at the top right.

C) Running the Program Report

- If this is your first time running this report, use step B, otherwise, proceed with step A.**

A) Selecting the reports:

- Select the "Find an Existing Value" tab.
- 'Click' Search to continue and list of Run Control Id's will display.
- Select an existing Run Control ID that is the same as your report number given to you.



Find an Existing Value | Add a New Value

▼ Search Criteria

Search by: Run Control ID begins with

Correct History Case Sensitive

Search | Advanced Search

Search Results

View All | First | 1-8 of 8 | Last

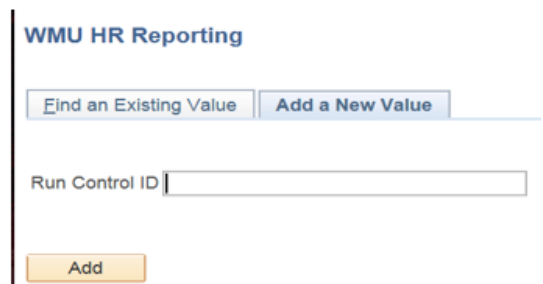
Run Control ID	Language Code
wmhrXXXX-XXXX	English

Example: wmhrXXXX-XXXX

- If you do not see the report number listed, then proceed to Step B.

B) If this is your first time running this report, you will need to add a run control

- Select the "Add a New Value" tab.
- Enter your designated report number (wmhrXXXX-XX) in the Run Control ID box.
- 'Click' Add to continue



WMU HR Reporting

Find an Existing Value | Add a New Value

Run Control ID

Add

- 2) Some programs require you to enter a parameter like 'As of Date'. Enter the As of Date in the following format: mm/dd/yyyy. Today's date is generally what is needed, however, a future or past date can be used.

HR Run Control/ Parm

Run Control ID wmgr Report Manager Process Monitor **Run**

As of Date (mm/dd/yyyy) 10/23/2017

Save Return to Search Notify Add Update/Display Correct History

- 3) Click 'Run'.
- 4) Select the box next the Description that matches the first part of the Run Control ID. In this case, it is WMHR5011-Point in time Jobdata.
Note: The Server Name remains blank

Process Scheduler Request

User ID Run Control ID wmgr

Server Name Run Date 10/18/2017

Recurrence Run Time 8:35:08AM Reset to Current Date/Time

Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	WMHR5011-Point in time Jobdata	WMHR5011	SQR for Reporting User	Web	PDF	Distribution
<input type="checkbox"/>	WMHR5027-Job Earnings by EE	WMHR5027	SQR for Reporting User	Web	PDF	Distribution
<input type="checkbox"/>	WMHR5028-Job History for EE	WMHR5028	SQR for Reporting User	Web	PDF	Distribution

OK Cancel

- 5) 'Click' OK.

6) 'Click' on the Process Monitor URL to view the program running and view the spreadsheet.

HR Run Control/ Params

Run Control ID wmgr

Report Manager **Process Monitor** Run

Process Instance: 1175469

As of Date (mm/dd/yyyy) 10/23/2017

Save Return to Search Notify Add Update/Display Correct History

7) The Process List is where you view the program status and get to the spreadsheet. While the program is running, the Run Status may be either Queued or Processing. Once complete the Run Status will be Success (should take less than five minutes.)

Process List Server List

View Process Request For

User ID [] Type [] Last [] 14 Days [] Refresh

Server [] Name [] Instance From [] 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"/>	1175469		SQR for Reporting User	WMHR5011		09/28/2017 8:03:01PM EDT	Success	Posted	Details
<input type="checkbox"/>	1175468		SQR for Reporting User	WMHR5011		09/28/2017 8:00:07PM EDT	Success	Posted	Details

Note: Click the Refresh button periodically to get an updated Run Status.

Note: One time deal: The system keeps 60 day's worth of reports. Change 'Last' to 14 Days or greater and click Save to keep this setting. This will allow you to see 14 days of your runs.

Note: The Run Status and Distribution Status should remain blank

8) 'Click' the Details URL once the Run Status says 'Success'. If the status says 'Error', then try re-running the program again. Double check the Run Control ID/report number is correct and make sure it matches up with the report number on the Process Scheduler Request.

NOTE: If you still receive an error, contact Human Resources at (269)387-3620 or email hr-hris@wmich.edu with a screen shot of the error.

9) Click the View Log/Trace URL.

Process Detail



Help

Process

Instance 1175469 Type SQR for Reporting User
 Name WMHR5011 Description WMHR5011-Point in time Jobdata
 Run Status Success Distribution Status Posted

Run

Run Control ID wmhr5011-24
 Location Server
 Server PSRPTG
 Recurrence

Update Process

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Re-send Content Restart Request

Date/Time

Request Created On 09/28/2017 8:03:10PM EDT
 Run Anytime After 09/28/2017 8:03:01PM EDT
 Began Process At 09/28/2017 8:03:19PM EDT
 Ended Process At 09/28/2017 8:07:41PM EDT

Actions

[Parameters](#) Transfer
[Message Log](#)
 Batch Timings
[View Log/Trace](#)

OK
Cancel

- 10) Click on the .csv file name and it will automatically open or go to the download folder. Format it and save it to your PC or LAN or leave it in PeopleSoft. It will remain in PeopleSoft for 60 days. **Be mindful of where data is saved when dealing with confidential data.**

View Log/Trace

Help

Report

Report ID 849683 Process Instance 1175469 [Message Log](#)
 Name WMHR5011 Process Type SQR for Reporting User
 Run Status Success

WMHR5011-Point in time Jobdata

Distribution Details

Distribution Node RPT_DISTNODE_RP Expiration Date 03/27/2018

File List

Name	File Size (bytes)	Datetime Created
SQR_WMHR5011_1175469.log	1,817	09/28/2017 8:07:41.825214PM EDT
WMHR5011_1175469.out	5,635	09/28/2017 8:07:41.825214PM EDT
wmhr5011-24-2017-10-23-1175469.csv	97,713	09/28/2017 8:07:41.825214PM EDT

Distribute To

Distribution ID Type *Distribution ID
 User :

Return

Your report number displays here

Quick Click Instructions

Run Control: **wmhrXXXX-XX** (Name of your report : _____)

Folder: None

- 1) Sign in to PeopleSoft
- 2) Click – <Reporting Tools>
- 3) Click - <WMU Reporting>
- 4) Click - <WMU-Human Resource Reporting>
- 5) Click - <WMU – HR Reporting>
(First time only: Click then type “**Run Control ID/Report number**” for Run Control ID then Click <Add>)
- 6) Click – Search and select from list
If your report is not there, (first time only: Click then type “**Run Control ID/Report number**” for Run Control ID then Click <Add>)
- 7) Enter the As of Date then Click the <Run> box
- 8) Check box correlating to the name of the “**Run Control ID/Report name, ex: WMHR5011-Point in time Jobdata**” you are running
- 9) Click <OK> (at bottom of page)
- 10) Click the Process Monitor link
- 11) Insure Last is at least 14 Days then Click <Refresh>
- 12) Keep Clicking <Refresh> until the status reads “Success” and “Posted”
- 13) Click the Details link
- 14) Click the View Log Trace link
- 15) Click the ‘**report number.csv**’ link to open the report - **Be mindful of where data is saved when dealing with confidential data.**