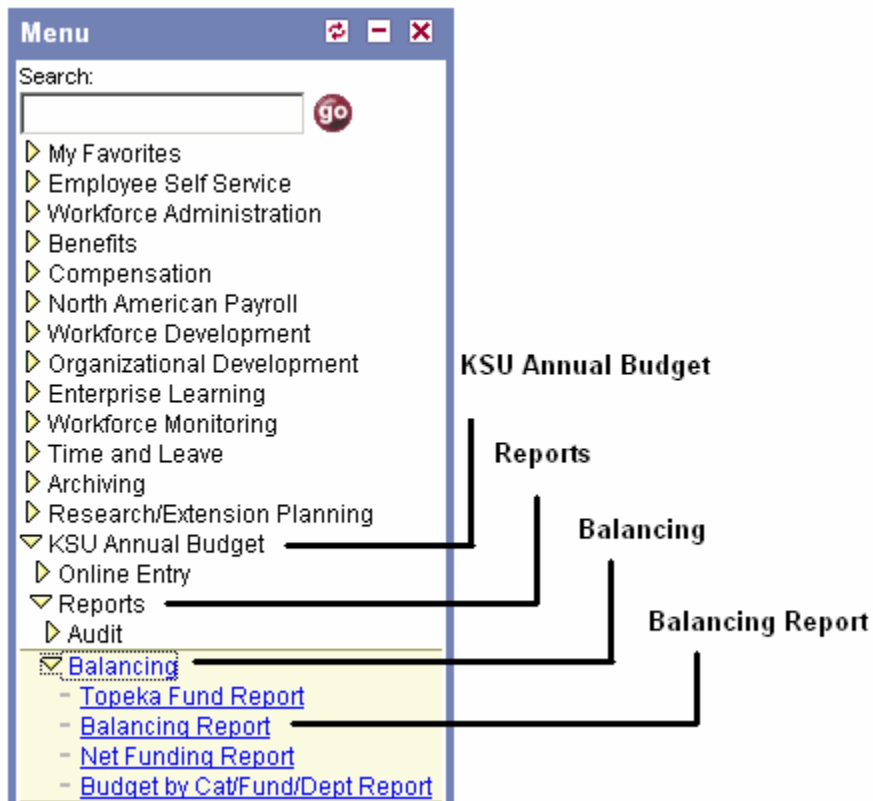


Running / Viewing / Printing Reports

Department Balancing Report

This report is used to compare unclassified increases to budget line and fund. The appropriate time to print this report is after changes have been made for the new fiscal year.

1. Access HRIS Report



2. Select Run Control ID

- * Enter an existing Run Control ID or click on the "Search" button to produce a list of Run Control ID's ... search results will appear. Select a Run Control ID from the list. <Enter>

Balancing Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID: begins with

[Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

If a RUN CONTROL ID DOES NOT EXIST, repeat Step 1. Select **"Add a New Value."** A "Run Control ID" edit box will appear. Enter a three-digit Run Control ID. Select the "Add" button. Note: This procedure will only need to be done ONE TIME.

The RUN CONTROL ID is used to define the parameters for running the report. Once the Run Control ID is created, it may be reused over and over for any HRIS report.

HRIS Training Tip: When creating a RUN CONTROL ID, keep the Run Control ID short and use only alphabetical letters or numbers. Some characters (Examples: &, %, *, etc.) take on a special meaning that is not intended and cause problems. If you have a Run Control ID that includes a special character, please discontinue using it.

The Report Request Parameters page will appear.

3. Complete the Report Request Parameters

- ❖ **Fiscal Year**: Enter Fiscal Year (YYYY)

 - ❖ **Sub Agency**: Options are: **None**, **E** – Research & Extension, **M** – Main Campus, **V** – Veterinary Medicine

 - ❖ **College\ Budget Unit**: Predefined ID's (i.e., 3670020010, 3670030010, etc.) are used to select an entire college or budget unit ... College of Arts and Sciences, College of Engineering, etc.
- OR
- ❖ **DeptID**: Department ID (i.e., 3670005050, 3670020060, 3670040060, etc.) used to select a single department.
- OR
- ❖ **Dept Group**: **Warning: Using a Dept Group ID for this report may take an unacceptable amount of time before the print process begins.** Use Department ID, if possible. The Department Group ID is normally used by major administrative unit personnel (i.e., Dean's Office) to print information for all the departments within the college

 - ❖ **Fund Type**: Options are: **None**, **GU** (General Use), **RU** (Restricted Use).

 - ❖ **Special Allocation**: Choose the special allocation unit.

 - ❖ **Print?**: Turn "check box" on to print a hard copy of the report.
- OR
- ❖ **Write Delimited File?**: Turn "check box" on to create a delimited file (i.e., Excel spreadsheet)

Report Request Parameters	
Fiscal Year	<input type="text" value="2006"/> <input type="button" value="Q"/>
Sub Agency	<input type="text"/> <input type="button" value="Q"/>
DeptID	<input type="text" value="3670040010"/> <input type="button" value="Q"/> Education Dean of
College / Budget Unit	<input type="text"/> <input type="button" value="Q"/>
Dept Group	<input type="text"/> <input type="button" value="Q"/>
Fund Type	<input type="text"/> <input type="button" value="Q"/>
Special Indicator	<input type="text"/> <input type="button" value="Q"/>
Special Allocation	<input type="text"/> <input type="button" value="Q"/>
	<input checked="" type="checkbox"/> Print?
	<input checked="" type="checkbox"/> Write Delimited File?

Department Balancing Report

4. Save and Run the Report

- * Select " **Save** " to retain selected report parameters.
- * Select " **Run** " to run the report and to access the Process Scheduler Request page.

The screenshot shows the 'Human Resource Information System' interface for Kansas State University. At the top, there is a navigation bar with 'Home' and 'Add to Favorites' links. Below this, a 'Balancing Report' tab is active. The 'Run Control ID' is set to 'kak'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button which is circled in yellow. Below these is a 'Report Request Parameters' section with the following fields:

Fiscal Year	2006	<input type="checkbox"/> Print?
Sub Agency		<input checked="" type="checkbox"/> Write Delimited File?
DeptID	3670040010	Education Dean of
College / Budget Unit		
Dept Group		
Fund Type		
Special Indicator		
Special Allocation		

At the bottom of the form, there are three buttons: 'Save' (circled in green), 'Return to Search', and 'Add' (with a plus sign icon).

Department Balancing Report

5. Set Up Process Scheduler Request Page

The following options exist for running, viewing or printing the report:

Web Option

E-Mail Option

To view/print report via the <u>Web</u> :	To view/print report via <u>Electronic Mail</u> :
<u>Server Name</u> : PSUNX	<u>Server Name</u> : PSUNX
<u>Type</u> : Web	<u>Type</u> : E-Mail
<u>Format</u> : CSV	<u>Format</u> : PDF
Runs report to the process scheduler.	Runs report to e-mail.

Human Resource Information System
Kansas State University

Home | Add to Favorites | Sign o

New Window | Help

Process Scheduler Request

User ID: KKUGLE Run Control ID: kak

Server Name: PSUNX Run Date: 05/11/2005

Recurrence: Recurrence: Run Time: 1:02:22PM Reset to Current Date/Time

Time Zone: Time Zone:

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	BO Balancing Report	WBUD632	SQR Report	Email	PDF

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	BO Balancing Report	WBUD632	SQR Report	Web	CSV

OK Cancel

All other fields may be left blank or filled with default data (i.e., Recurrence, Time Zone, Run Date, and Run Time). After completing the options, select **“OK” to run the report.**

Department Balancing Report

6. View or Print the Report

After selecting "OK" ... HRIS will return to the Report Request Parameters page.

- * **Report Manager** (Page 7) will produce a list of reports that have been set up using the web type on the Process Scheduler Request Page and sent to the process scheduler/report list.

Or

- * **Process Monitor** (Page 12) will provide the status of the report (i.e., initiated, error, success, etc.). This option is used when the email type has been selected on the Process Scheduler Request Page.

Human Resource Information System
Kansas State University

Home | Add to Favorites

New Window

Balancing Report

Run Control ID: kak

Report Manager Process Monitor Run

Process Instance:49756

Report Request Parameters

Fiscal Year	2006	Print?	<input checked="" type="checkbox"/>
Sub Agency		Write Delimited File?	<input checked="" type="checkbox"/>
DeptID	3670040010		
College / Budget Unit			
Dept Group			
Fund Type			
Special Indicator			
Special Allocation			

Save Return to Search Add

Department Balancing Report Report Manager - Set Up Report List

- * Status Edit Box = Posted or Blank
- * Select "Refresh" to View Report List
- * If status = Posted ... Select "View" to Access Report/Log Viewer

The screenshot shows the 'Report Manager' interface. At the top, there are tabs for 'Explorer', 'List', 'Administration', and 'Archives'. Below the tabs is a 'View Reports For' section with the following fields: 'User ID' (KKUGLE), 'Type' (SQR Report), 'Last' (1 Days), 'Status' (Posted), 'Folder', 'Instance', and 'to'. A 'Refresh' button is highlighted with a yellow circle. Below this is a 'Report List' table with columns: Select, Report ID, Prcs Instance, Report Description, Request Date/Time, Format, Status, Details, and View. Two reports are listed: 'BO Balancing Report' and 'Budget by Cat/Fund/Dept'. The 'View' link for the first report is circled in blue.

Select	Report ID	Prcs Instance	Report Description	Request Date/Time	Format	Status	Details	View
<input type="checkbox"/>	45467	49756	BO Balancing Report	05/11/2005 1:04:42PM	Comma delimited (*.csv)	Posted	Details	View
<input type="checkbox"/>	45391	49677	Budget by Cat/Fund/Dept	05/11/2005 11:19:35AM	Acrobat (*.pdf)	Posted	Details	View

Note: Reports will remain on the "Report List" for 30 days.

Department Balancing Report

Report Manager -Access Report from Report/Log Viewer

- * A Message Log, Trace File, and File Name(s) will appear.
- * To view the report, select the file name ...
wbud632_xxxxx.csv

Report Detail

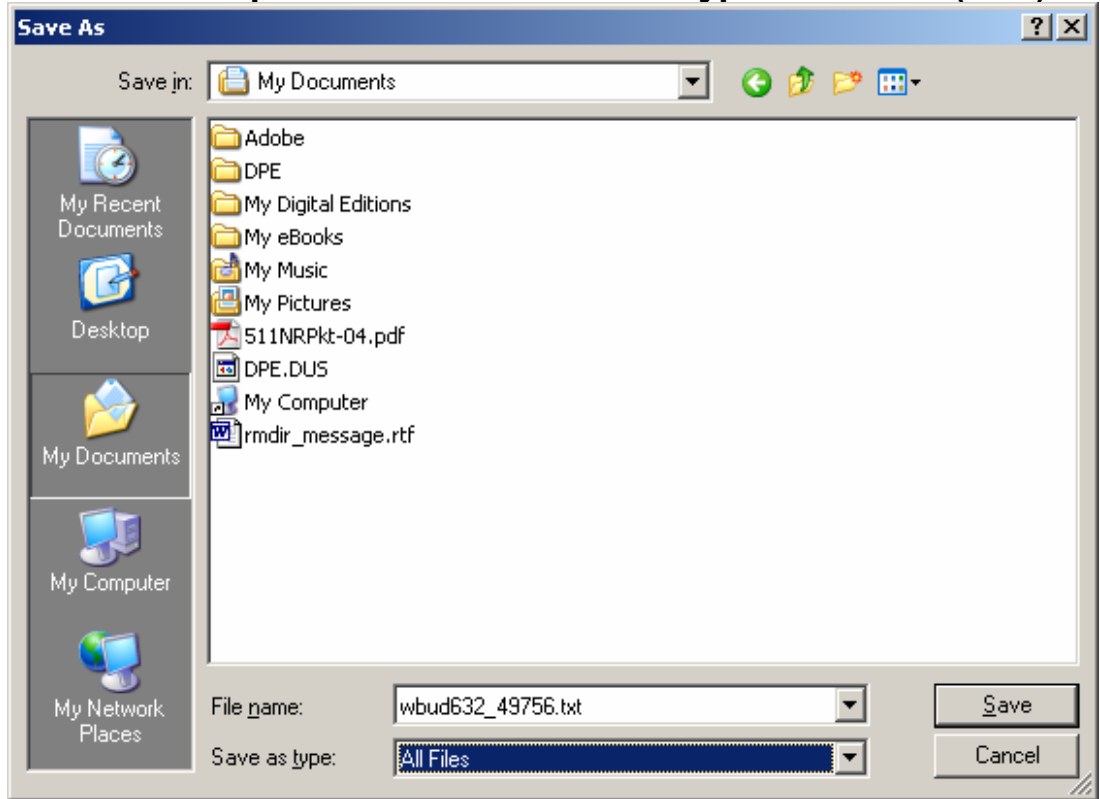
Report ID: 45467 **Process Instance:** 49756
Name: WBUD632 **Process Type:** SQR Report
Run Status: Success
BO Balancing Report

File List

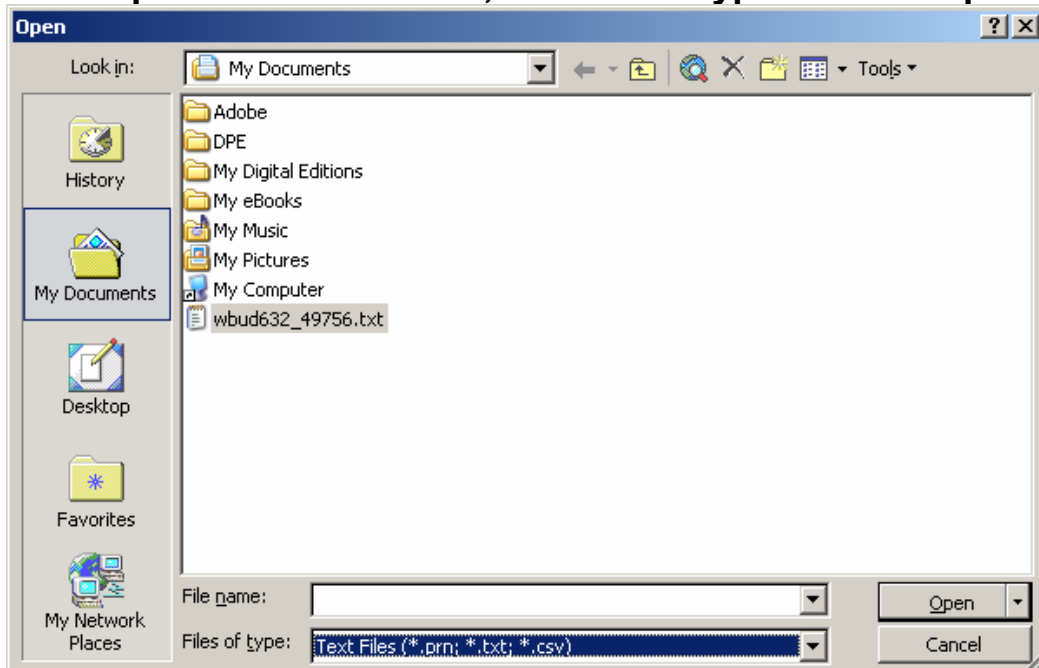
Name	File Size (bytes)	Datetime Created
Message Log	1,641	05/11/2005 1:05:06.000000PM CDT
wbud632_49756.csv	1,732	05/11/2005 1:05:06.000000PM CDT
Trace File	628	05/11/2005 1:05:06.000000PM CDT

Department Balancing Report

* After selecting the csv file, save it as text, and open it with Excel. Open csv file and save as type "Text File (*.txt)".



Open Microsoft Excel, find file as type text and open.



Department Balancing Report

Complete the text import wizard: Delimited, Next, Comma, and Next.

Text Import Wizard - Step 1 of 3 [?] [X]

The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type
Choose the file type that best describes your data:

Delimited - Characters such as commas or tabs separate each field.
 Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: File origin:

Preview of file C:\Documents and Settings\kkugle\My Documents\wbud632_49756.txt.

1	,PeopleSoft
2	Report ID: ,WBUD632 ,BALANCING REPORT ,Page No. 1
3	Run Date ,05/11/2005
4	Run Time ,13:05:06
5	FISCAL YEAR : 2006

Cancel < Back Next > Finish

Text Import Wizard - Step 2 of 3 [?] [X]

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

Tab Semicolon Comma Treat consecutive delimiters as one
 Space Other: Text qualifier:

Data preview

Report ID:	PeopleSoft	BALANCING REPORT	Page No. 1
Run Date	WBUD632		
Run Time	05/11/2005		
FISCAL YEAR : 2006	13:05:06		

Cancel < Back Next > Finish

Department Balancing Report

Complete the text import wizard: Finish

Text Import Wizard - Step 3 of 3 [?] [X]

This screen lets you select each column and set the Data Format.

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

General
 Text
 Date: MDY [v]
 Do not import column (skip)

Advanced...

Data preview

General	General	General	General
Report ID:	PeopleSoft	BALANCING REPORT	Page No. 1
Run Date	05/11/2005		
Run Time	13:05:06		
FISCAL YEAR : 2006			

Cancel < Back Next > Finish

To print the report, select the  icon.

Or, select File > Print.

Department Balancing Report

Process Monitor - View Report Status

Use Process Monitor to view the Process List and Run Status. A report set up using **Type = Email ; Format = PDF** can not be accessed using Report Manager.

Balancing Report

Run Control ID: kak [Report Manager](#) [Process Monitor](#)

Report Request Parameters

Fiscal Year	<input type="text" value="2006"/>	Q	<input checked="" type="checkbox"/>	Print?
Sub Agency	<input type="text"/>	Q	<input checked="" type="checkbox"/>	Write Delimited File?
DeptID	<input type="text" value="3670040010"/>	Q	Education Dean of	
College / Budget Unit	<input type="text"/>	Q		
Dept Group	<input type="text"/>	Q		
Fund Type	<input type="text"/>	Q		
Special Indicator	<input type="text"/>	Q		
Special Allocation	<input type="text"/>	Q		

Process List [Server List](#)

View Process Request For

User ID: Q Type: Last: Days

Server: Name: Q Instance: to

Run Status: Save On Refresh

[Customize](#) | [Find](#) | [View All](#) | 1-4 of 4

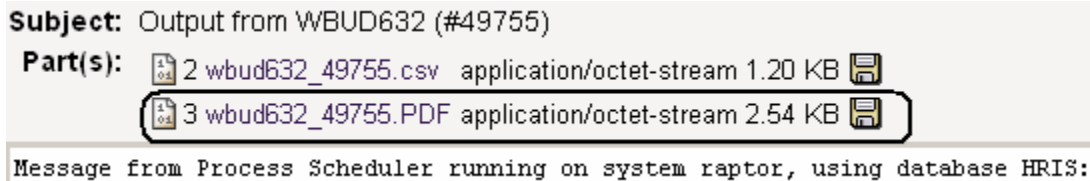
Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
49756		SQR Report	WBUD632	KKUGLE	05/11/2005 1:04:34PM CDT	<input type="button" value="Success"/>	Details
49755		SQR Report	WBUD632	KKUGLE	05/11/2005 1:02:22PM CDT	Success	Details

Department Balancing Report Process Monitor - View Report Status

- * **When Process Monitor Run Status indicates "Success" open e-mail to view/print report.**



- ❖ **Open the PDF file to view or print the report.**



If an error occurs, please contact the **HELP DESK at 532-7722**. Be prepared to provide them with any details (i.e., error message(s), steps followed, etc.).

If you have questions regarding the information displayed in the report -- please call your HR liaison at 532-6277 or Alma Deutsch at 532-1448.