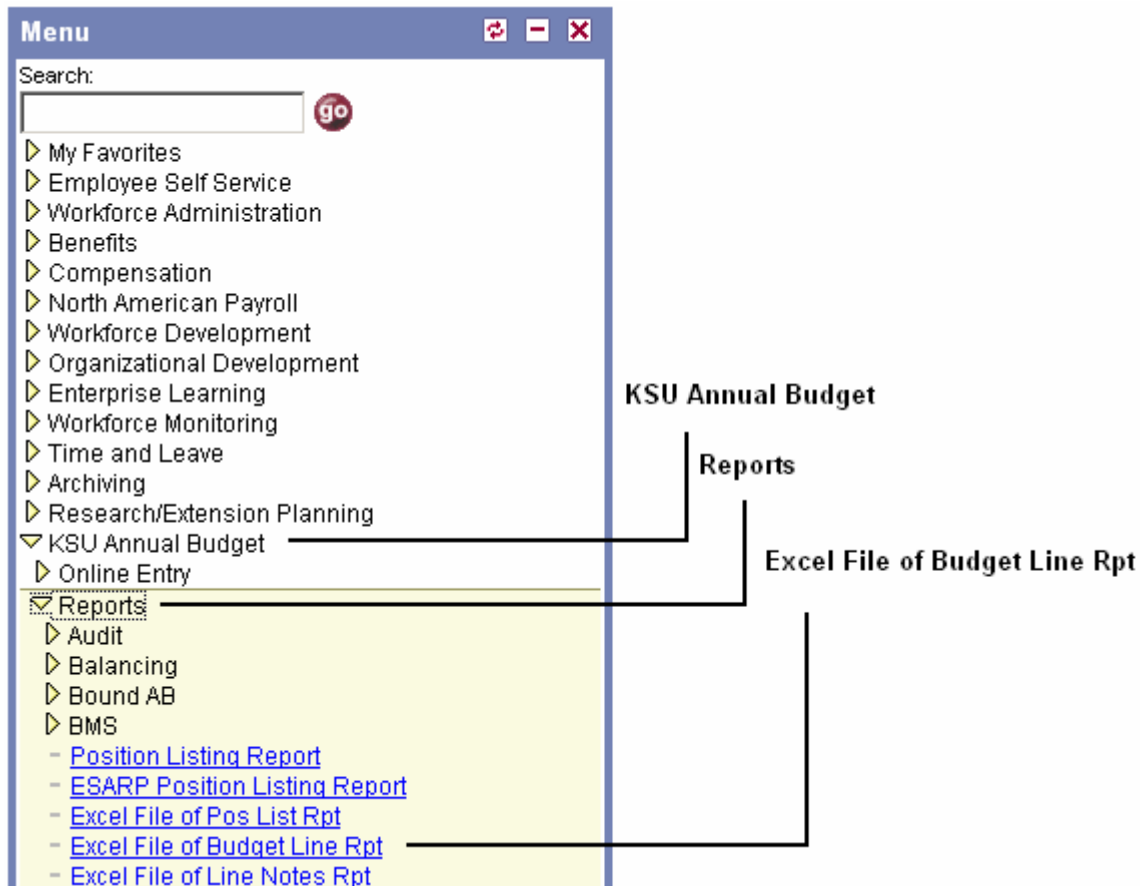


Running / Viewing / Printing Reports

Excel File of Budget Line

This report produces budget line/position data in file format and may be ordered at any time. Importing the report to Microsoft Excel allows data to be manipulated.

1. Access 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>

Excel File of Budget Line

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:

[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.

2. Complete the Report Request Parameters.

- ❖ **Fiscal Year**: Enter Fiscal Year
- ❖ **Sub Agency**: Options are **None**, **ESARP**, **Main Camp(us)** and **Vet Med**.
- ❖ **College/Budget Unit**: Enter appropriate values.
- ❖ **DeptID**: Example: 367000XXXX
- ❖ **Dept Group**: Enter appropriate values.
- ❖ **Budget Line**: **Budget Line options are:**
Benefit, HRIS, Joint, OOE, Pooled, Shrink Up, Shrinkage, Student
- ❖ **Type of Line**: Options are:

B	Benefit Position
E	OOE Position
J	Joint Position
P	Pooled Position
S	Student Position
W	HRIS Position
X	Shrinkage Up Line
Y	Shrinkage Down Line

- ❖ **Class Indicator**: Options are **Classified** and **Unclassified**.

The screenshot shows a web form titled "Report Request Parameters". The form contains the following fields and options:

- Fiscal Year**: Text input with "2006" and a search icon.
- Sub Agency**: Dropdown menu with "Main Camp" selected.
- College / Budget Unit**: Text input with a search icon.
- DeptID**: Text input with "3670040010" and a search icon. The text "Education Dean of" is visible to the right.
- Dept Group**: Text input with a search icon.
- Budget Line**: Text input.
- Type of Line**: Text input with "W" and a search icon. The text "HRIS Position" is visible to the right.
- Classified Indicator**: Radio button group with "Classified" (unselected) and "Unclassified" (selected).

3. **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.

Excel Bud Line

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

Report Request Parameters

Fiscal Year	2006	<input type="text"/>	<input type="text"/>
Sub	Main Camp	<input type="text"/>	<input type="text"/>
Agency:		<input type="text"/>	<input type="text"/>
College / Budget Unit		<input type="text"/>	<input type="text"/>
DeptID	3670040010	<input type="text"/>	Education Dean of
Dept Group		<input type="text"/>	<input type="text"/>
Budget Line:		<input type="text"/>	<input type="text"/>
Type of Line	W	<input type="text"/>	HRIS Position

Classified Indicator
 Classified Unclassified

Save [Return to Search](#) **Add**

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> : PDF	.	<u>Format</u> : PDF
Runs report to the process scheduler.	.	Runs report to e-mail.

Process Scheduler Request

User ID: KKUGLE Run Control ID: kak

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Process List

Select	Description	Process Name	Process Type	'Type	'Format
<input checked="" type="checkbox"/>	Excel File of Budget Line	WBUD324	SQR Report	Email	PDF

Process List

Select	Description	Process Name	Process Type	'Type	'Format
<input checked="" type="checkbox"/>	Excel File of Budget Line	WBUD324	SQR Report	Web	PDF

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.

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 13) 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.

Excel Bud Line

Run Control ID: kak

[Report Manager](#) [Process Monitor](#)

Process Instance:50044

Report Request Parameters

Fiscal Year	2006	<input type="button" value="Q"/>	Classified Indicator
Sub	Main Camp	<input type="button" value="v"/>	<input type="radio"/> Classified
Agency:			<input checked="" type="radio"/> Unclassified
College / Budget Unit		<input type="button" value="Q"/>	
DeptID	3670040010	<input type="button" value="Q"/>	Education Dean of
Dept Group		<input type="button" value="Q"/>	
Budget Line:			
Type of Line	W	<input type="button" value="Q"/>	HRIS Position

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

Explorer List Administration Archives

View Reports For

User ID: Type: Last: Days

Status: Folder: Instance: to:

Report List [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-8 of 8 | [Last](#)

Select	Report ID	Prcs Instance	Report Description	Request Date/Time	Format	Status	Details	View
<input type="checkbox"/>	45736	50044	Excel File of Budget Line	05/12/2005 11:32:02AM	Acrobat (*.pdf)	Posted	Details	<input type="button" value="View"/>

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

Excel File of Budget Line

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:\Temp\wbud324_421094_csv.txt.

1	Budget Line	Type	Emplid	Rcd#	Name	Position	Eff Status	C/U	Full/
2	E0000597	E	,00," "	,A,	,,	,R,0000.000	,000015917	,000000000	,00
3	E0000598	E	,00," "	,A,	,,	,R,0000.000	,000077103	,000000000	,00
4	E0000670	E	,00," "	,A,	,,	,0000.000	,000008018	,000000000	,00
5	W0006087	J	W0000012336	,00	,Gehrt, Jennifer I	,W0006087	,A,U,F,F	,R	

Cancel < Back Next > Finish

Click Comma as Delimiter:

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
 Space Other:

Treat consecutive delimiters as one

Text qualifier:

Data preview

Budget Line	Type	Emplid	Rcd#	Name	Position	Eff S
E0000597	E		00			A
E0000598	E		00			A
E0000670	E		00			A
W0006087	J	W0000012336	00	Gehrt, Jennifer I	W0006087	A

Cancel < Back Next > Finish

Click 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.

Advanced...

Column data format:

- General
- Text
- Date: MDY
- Do not import column (skip)

Data preview

General	Gener	General	Gener	General	General	Gener
Budget Line	Type	Emplid	Rcd#	Name	Position	Eff St
E0000597	E		00			A
E0000598	E		00			A
E0000670	E		00			A
W0006087	J	W0000012336	00	Gehrt, Jennifer I	W0006087	A

Cancel < Back Next > Finish

Report appears as Excel File.

Microsoft Excel - wbud324_421094_csv.txt

File Edit View Insert Format Tools Data Window Help

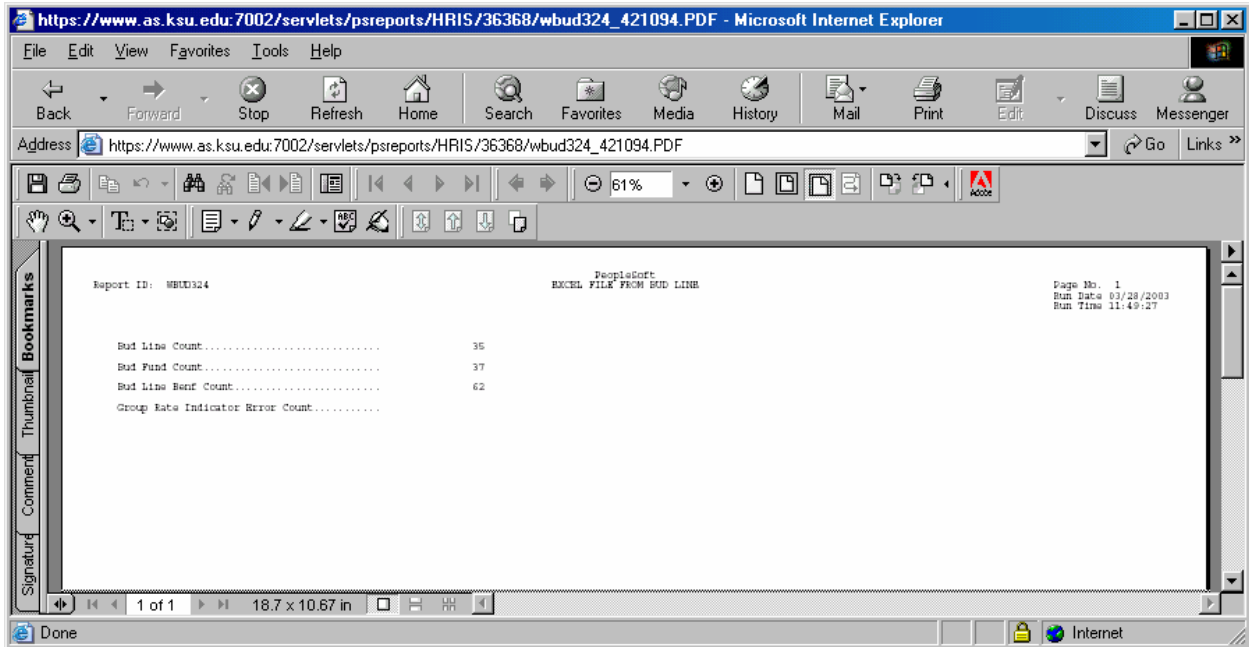
Arial 10 B I U \$ % , +.00 +.00

	A	B	C	D	E	F	G	H	I	J	K
	Budget Line	Type	Emplid	Rcd#	Name	Position	Eff Status	C/U	Full/Part T	12-Sep	Reg/Temp
1	E0000597	E		0			A				R
2	E0000598	E		0			A				R
3	E0000670	E		0			A				R
4	W0006087	J	W0000012	0	Gehrt, Jenn	W0006087	A	U	F	F	R
5	S0000264	S		0			A	U	P		R
6	W0006087	J	W0000012	0	Gehrt, Jenn	W0006087	A	U	F	F	R

Report Manager - Print Report

* To print the report, select the  icon.

Or, select File > Print.



Process Monitor - View Report Status

Use Process Monitor to view the Process List and Run Status.

Excel Bud Line

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

Report Request Parameters

Fiscal Year: 2006 **Classified Indicator**
 Classified Unclassified

Sub Agency: Main Camp
 College / Budget:

Process List [Server List](#)

View Process Request For

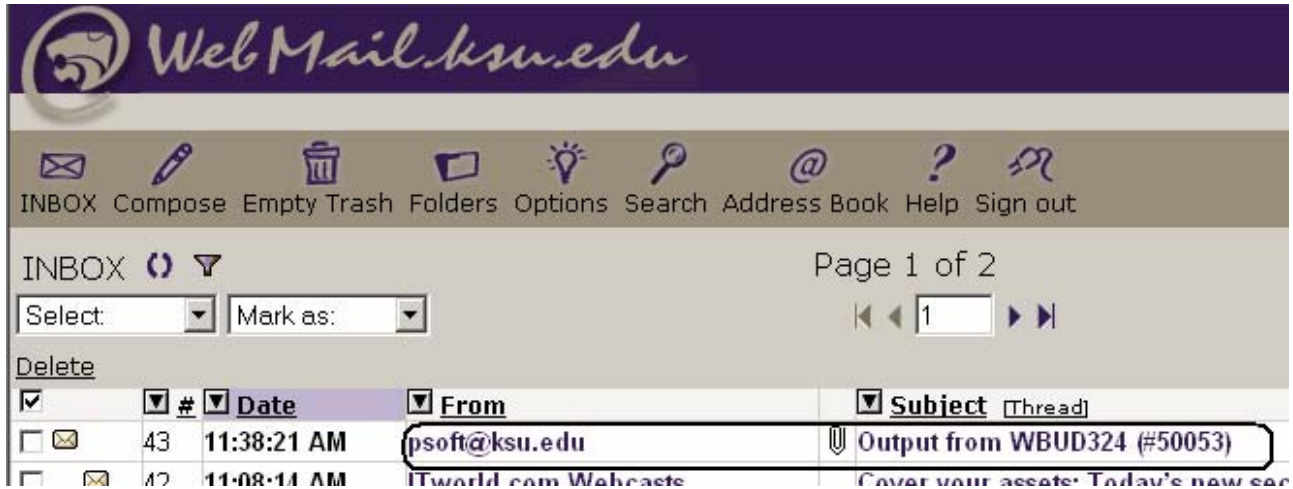
User ID: KKUGLE Type: Last: 1 Days
 Server: Name: Instance: to
 Run Status: Save On Refresh

Customize | Find | View All | First 1-12 of 12 Last

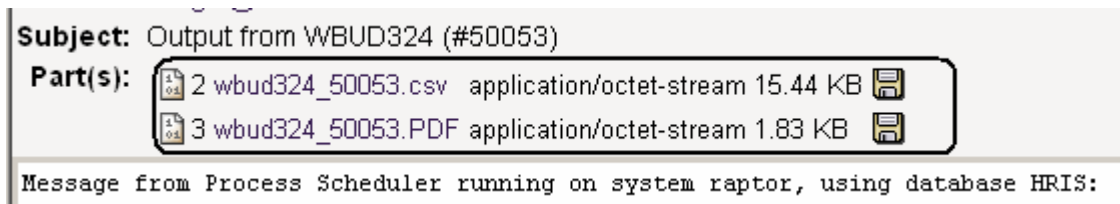
Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
50044		SQR Report	WBUD324	KKUGLE	05/12/2005 11:25:58AM CDT	Success	Details
50025		SQR Report	WBUD630F	KKUGLE	05/12/2005 10:43:32AM CDT	Success	Details
50020		SQR Report	WBUD630E	KKUGLE	05/12/2005 9:40:31AM CDT	Success	Details

Process Monitor - View Report Status

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



- * **Open the CSV file to view or print the report in Excel.**



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.