

# Salary Planning in PeopleSoft:

## Creating and Interpreting Reports



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# Salary Planning in PeopleSoft: Creating and Interpreting Reports

## Section 1 – Navigating to Reports

Once you have logged-in to Peoplesoft, go to **Compensation** → **Base Compensation** → **SOG Reports**.



Under **SOG Reports**, you will be able to choose one of the following eight reports: **Cost of Reduced Salary Increase**, **Cost of Salary Increases**, **Employee Review Audit**, **Employees by Increase Rating/Recommendation**, **Increase Distribution Summary**, **Preliminary Exception List**, **Salary Increase List** or **Salary Increase List by Type**.



**NOTE:** Before you run any report, you may want to get a screen print of the report panel. This way, you will have a record of exactly what you asked for.

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### Section 2 – Aspects Common to All Seven Reports

There are three sections that function in exactly the same manner in all eight report panels: **1) the Run Control ID section**, **2) the Company section**, and **3) the Salary Plan section**.

The screenshot displays the PeopleSoft interface for running a report. It features three main sections:

- Run Control ID:** Labeled with a red '1', it shows the text 'test' and a search icon.
- Company:** Labeled with a blue '2', it shows a search box with the text '\*For This Company:'.
- Salary Plan:** Labeled with a green '3', it shows a scrollable list of salary plans: 'Leave', 'Salary Plan', 'blank for combination', and 'SWD, SRE, MD1'. Navigation buttons like 'First', 'Last', and '1 of 1' are visible.

At the top right, there are tabs for 'Report Manager', 'Process Monitor', and a yellow 'Run' button.

#### 2A: User and Run Control IDs

Your User ID will automatically appear in the top left corner of all reports. This is the PeopleSoft ID you used to login.

As for the Run Control ID, you will receive a prompt window asking for this ID whenever you Update/Display a report. You will create this ID the **first** time you want to generate a report (using the “Add” feature). For all future reports, you may use the same Run Control ID. Unlike other Peoplesoft panels, changes that are made to the Salary Planning Reports panels are **not** saved to your Run Control ID. Therefore, after you have generated your first report, you can use the same Run Control ID for any reports you want to run in the future.

For your *first* report, you will navigate to the report and click on **Add A New Value** tab.

The screenshot shows the 'Cost of Reduced Salary Incr' report panel. On the left is a 'Menu' tree with 'SOG Reports' expanded. The main panel has the following elements:

- Header: 'Cost of Reduced Salary Incr' with links for 'New Window', 'Help', and 'HELP'.
- Instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.'
- Navigation: Two tabs, 'Find an Existing Value' and 'Add a New Value'. A red arrow points to the 'Add a New Value' tab.
- Form: A 'Run Control ID:' field with a dropdown menu set to 'begins with' and an empty text input box.
- Options: A 'Case Sensitive' checkbox which is currently unchecked.
- Buttons: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.
- Footer: Links for 'Find an Existing Value' and 'Add a New Value'.

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The following prompt window will appear:

Make up whatever you want your Run Control ID to be, enter it here, and click **ADD**. For example, the Run Control ID created for this training manual is “test.” Notice that this same ID is used for all the reports generated. There is absolutely no advantage to using different Run Control IDs for different reports.

### 2B: Company

The first thing you need to enter for any report is the company you will be working with. In almost every situation, this will be the agency you work for. Since you will have access only to the data from your own agency, you will enter the same number in this field every time you run a report.

### 2C: Salary Plan

Most agencies will want to leave the Salary Plan section blank. If this section is blank, you will receive information on employees in any of three salary plans: SWD, SRE, and MD1. For most agencies, this is the information being sought. However, a few agencies have employees on different salary plans. To get information on these employees, either key-in the name of the salary plan or click on the look up button, find the salary plan, and click on it.

Salary Administration Plan	Description	Currency Code	Company
404	Dept of Audits Salary Plan	USD	404
430	Judicial Branch Salary Plan	USD	(blank)
442	Dept of Law Salary Plan	USD	442
444	General Assembly Salary Plan	USD	444
462	TRG Staff Salary Plan	USD	(blank)
922	GA World Congress Center Auth	USD	922
977	GA Public Broadcasting Sal Pln	USD	977

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If you want information about employees in more than one ancillary salary plan (or two of the three main salary plans), enter the first plan and then click on the **Insert Row** icon.

Run Control ID: test

Report Manager Process Monitor Run

\*For This Company:

Salary Plan: CHW

Leave Salary Plan blank for combination SWD, SRE, MD1

A second **Salary Plan** box will appear. Now, enter the second salary plan. You can repeat this process to enter as many salary plans as you want. [If you make a mistake, just click the **Delete Row** icon to the right of the **Insert Row** icon.] **As an example**, if you are interested in employees in salary plans SWD and MD1 (but not SRE), you would follow these three steps: 1) Type “SWD” in the **Salary Plan** box, 2) Click the **Insert Row** icon, and 3) Type “MD1” in the second **Salary Plan** box.

Now that we have covered the three aspects that are common to all eight reports, **Sections 3-10** discuss the unique aspects of each report. Be aware that you will need to use the **Landscape** option in **Page Setup** to print any of the reports.

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## Section 3 – Cost of Reduced Salary Increase

The **Cost of Reduced Salary Increase** report<sup>1</sup> will be used only if your agency is considering lowering the PBI from 2%. Any time the PBI is lowered, the new percentage must be applied to the **whole** agency. The **Cost of Reduced Salary Increase** report panel looks like this:

The screenshot shows the 'Cost of Reduced Salary Incr' report panel. At the top, it displays 'Run Control ID: test' and navigation links for 'Report Manager', 'Process Monitor', and a 'Run' button. Below this, there are search fields for 'Company' and 'Percent'. The 'Percent' field is highlighted with a red circle. To the right, a 'Salary Plan' dropdown menu is open, showing a search field and a list of options: 'Leave Salary Plan blank for combination SWD, SRE, MD1'.

### 3A: Percent

The only new section of this panel is the **Percent** section:

A close-up of the 'Percent' input field, which is highlighted with a blue border. The field is empty and has a search icon to its right.

Here is where you will type in the lowered PBI percentage you are considering. This number must be less than 2. **As an example**, if you are considering giving the employees in the agency a 1.75% PBI, you would type “1.75” in this section and run the report.

On the **Cost of Reduced Salary Increase** report, all values refer to entire departments. This report conveys the following total costs (department sums): Old Salaries, PBIs, Total Increases, and New Salaries.

<sup>1</sup> Agencies requesting reduction in Performance Based Increases due to budgetary restrictions must contact the Office of Planning and Budget for consultation and approval. The deadline for contacting the Office of Planning and Budget for such a request is September 1, 2007.

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## Section 4 – Cost of Salary Increases

The **Cost of Salary Increases** report uses the data that have been entered to project costs. If no data have been entered, the projected costs will equal the current salaries. The **Cost of Salary Increases** report panel looks like this:

### 4A: Detail Level

In the middle of the screen on the left side of the panel is the **Detail Level** section:

The default detail level is **By Department**. This produces a report with one overall cost for each department. The overall cost is computed by summing the individual salaries and increase amounts of the employees within the department.

The **Detail Level** can be changed to **By Mail Drop** or **By Employee**. Like the **By Department** level, **By Mail Drop** produces a report with one overall cost for each mail drop. **By Employee** gives the salaries of individual employees and a total for each department, mail drop, or job code (depending on the sort method).

### 4B: Fringe Benefit Costs

To the right of the **Detail Level** section is the **Fringe Benefit Costs** section:

The default level is **Without**. A report **Without** fringe benefit costs will convey the following summarized costs: Old Salaries, PBIs (Performance-Based Increases), Total Increases, and New Salaries. If you choose the **With** option under **Fringe Benefit Costs**, you will get a report of the

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following summarized costs: New Salaries, Health Costs, FICA Costs, New Plan ERS Costs, Total Fringes, and New Salaries with Total Fringes.

**NOTE:** When the **Detail Level** is either **By Department** or **By Mail Drop**, you may choose a report **With** or **Without Fringe Benefit Costs**. However, when the **Detail Level** is **By Employee**, the report must be **Without Fringe Benefit Costs**.

## 4C: Sorts and Subgroups

Push Buttons to Select			
Desired Sort Sequence	<input type="text"/>		<b>Department</b> <input type="button" value="Sort"/>
Press the "Reset Button"	<input type="text"/>		<b>Mail Drop ID</b> <input type="button" value="Sort"/>
to Start Over	<input type="text"/>		<b>Job Code</b> <input type="button" value="Sort"/>
	<input type="button" value="Reset Sort Seq#"/>	<input type="text"/>	
			

For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Cost of Salary Increases** report allows you to subgroup by job code. Another difference is that the sorting feature is only available when the **Detail Level** is **By Employee** (and secondary sorts are not allowed). Finally, the subgroups that are available are dependent upon which **Detail Level** you are using.

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## Section 5 – Employee Review Audit

The **Employee Review Audit** report allows the company to view the most current employee reviews in one report. Gives all ratings for all employees so that the company can assure that every employee got a review during the Review Period.

**Dx Run Emp Rev**

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

For This  
\*Company:  Ga. Merit System of Pers. Adm.

Push Buttons to Select Desired Sort Sequence	Select These Subgroups (optional):	Then Sort By:
<input type="text"/>	<b>Department:</b>	<input type="text"/>
Press the "Reset" Button to Start Over.	<input type="text"/>	<input type="text"/>
<input type="button" value="RESET Sort Sequence"/>	<b>Mail Drop ID:</b>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<b>Job Code:</b>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<b>Review Rating:</b>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

### 5A: Sorts and Subgroups

Push Buttons to Select Desired Sort Sequence	Select These Subgroups (optional):	Then Sort By:
<input type="text"/>	<b>Department:</b>	<input type="text"/>
Press the "Reset" Button to Start Over.	<input type="text"/>	<input type="text"/>
<input type="button" value="RESET Sort Sequence"/>	<b>Mail Drop ID:</b>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<b>Job Code:</b>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<b>Review Rating:</b>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Employee Review Audit** report allows you to subgroup by job code and review rating. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).

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## Section 6 – Employees by Increase Rating/Recommendation

The **Employees by Increase Rating/Recommendation** report produces a list of employees receiving either a certain responsibility rating or a certain recommendation. The report panel looks like this:

### 6A: Responsibility Rating

In the middle of the screen on the left side of the panel is the **Resp Rating** section:

This section allows you to tailor your report to provide information about employees who receive a specific responsibility rating. Since these are check-boxes and not radio buttons, you may choose more than one rating. However, if you choose the **All** box, every other alternative will be grayed-out (because you are already asking for all 5 ratings).

### 6B: Recommendation

To the right of the **Resp Rating** section is the **Recommendation** section:

This section allows you to tailor your report to provide information about employees who receive a recommendation and employees who did not receive a recommendation. Unlike the responsibility ratings, these are radio buttons, so you may choose only one recommendation. However, if you want to see all employees, you may use the **All** button.

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**NOTE:** Each report may specify *either* a responsibility rating *or* a recommendation, but not both. Once you click in one section, the other section gets grayed-out. If you change your mind and want a report using the other section, the only way to accomplish this is to click on the **refresh button**  and start over.

## 6C: Sorts and Subgroups

Push Buttons to Select Desired Sort Sequence Press the "Reset Button" to Start Over	Select These Subgroups [optional]	Then Sort By
<input type="button" value="Reset Sort Seq#"/>	<input type="text"/> 	<b>Department</b> <input type="button" value="Sort"/>
	<input type="text"/> 	<b>Mail Drop ID</b> <input type="button" value="Sort"/>
	<input type="text"/> 	<b>Job Code</b> <input type="button" value="Sort"/>

For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Employees by Increase Rating/Recommendation** report allows you to subgroup by job code. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).

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## Section 7 - Increase Distribution Summary

The **Increase Distribution Summary** report produces counts and percentages of employees receiving each responsibility rating, terms and conditions rating, and recommendation. The report panel looks like this:

### 7A: Sorts and Subgroups

For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Increase Distribution Summary** allows you to subgroup by job code. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).

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## Section 8 – Preliminary Exception List

The **Preliminary Exception List** provides a record of employees who will fail to receive a PBI due to one or more of four possible errors: On Leave Without Pay, No Recommendation, Suspended, and Action Dated On or After Increase Date. The **Preliminary Exception List** panel looks like this:

### 9A: Sorts and Subgroups

For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Preliminary Exception List** allows you to subgroup by job code. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).

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## Section 9 – Salary Increase List

The **Salary Increase List** is a report that may be used *before* any ratings have been entered. This blank report is printed, and the ratings are recorded on the hard-copy. Then, they are entered in the **Mass Entry** screen. The **Salary Increase List** report panel looks like this:

The screenshot shows the 'Salary Increase List' report panel. At the top left, the 'Run Control ID' is set to 'test'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below this is a search field for 'For This Company'. A central box contains instructions: 'Push Buttons to Select Desired Sort Sequence. Press the "Reset Button" to Start Over.' with a 'Reset Sort Seq#' button. To the right of this box are two search fields for 'Subgroups [optional]'. Further right is a 'Salary Plan' search field with a dropdown menu showing 'Leave', 'Salary Plan blank for combination', and 'SWD, SRE, MD1'. Below this is a 'Then Sort By' section with two 'Sort' buttons: one for 'Department' and one for 'Mail Drop ID'.

We discussed the top half of the panel in **Section 2**. Now, we will focus on the bottom half of the panel. Here is where you will specify subgroups or data sorts. First, let's discuss sorting the data.

### 9A: Sorts

On the right side on the panel, you will see two **Sort** buttons under the heading **Then Sort By**. The default sort is "By Department." Therefore, if you do not click either of these buttons, your report will be sorted alphabetically within department. However, suppose that you want to sort the data by mail drop ID instead. If you click once on the **Sort** button beside **Mail Drop ID**, your report will be sorted alphabetically within mail drop.

Notice that after you click on the **Sort** button, a grayed-out box with a check in it appears under the heading **Page Break**. This just means that a page break is inserted whenever the mail drop ID changes.

This close-up shows the 'Then Sort By' section. It features two 'Sort' buttons: one for 'Department' and one for 'Mail Drop ID'. The 'Mail Drop ID' button is highlighted. To the left, there are search fields for 'Subgroups [optional]'. Above the buttons, there is a 'Page Break' heading with a grayed-out box containing a checkmark.

One last type of sort you can perform is a secondary sort. If you click one **Sort** button and then click the other **Sort** button, the data in your report will be sorted first on the primary sort (the first button clicked) and then on the secondary sort. **For example**, if the primary sort is "By Department" and the secondary sort is "By Mail Drop ID," the data will be sorted first by department, and within each department, the data will be grouped by mail drop ID.

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On the bottom left side of the **Salary Increase List** panel, you will see a section that appears on six of the seven report panels:



You will only need to use this section if you make a mistake with a sort. For instance, if you click on the mail drop **Sort** button and then decide that you want the data sorted by department instead, all you have to do is click on the **Reset Sort Seq#** button and start over.

## 9B: Subgroups

Unless you are conducting a report on the *entire* agency, you will need to specify the subgroups that you want in your report. Under the heading **Select These Subgroups [optional]**, you will see two boxes. The top box lets you select individual departments for the report, and the bottom box lets you select individual mail drop IDs (but you may pick only *one* of these two options).

Select These  
Subgroups [optional]

**Department**

**Mail Drop ID**

To select a department or mail drop ID, either key-in the numbers or click on the drop-down menu and choose from the list. If you want to select several departments or mail drop IDs that *all begin with the same number string*, you can use the wildcard variable (%) to do this. **As an example**, if you want a report of all departments that begin with "42710," you just type "42710%" into the **Department** box.

**NOTE:** If you make a mistake in this section and want to change from **Department** to **Mail Drop ID** (or vice versa), click on the **reset sort seq#** button to start over.

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## Section 10 – Salary/Employee Increase List by Type

The **Salary/Employee Increase List by Type** report produces a list of employees getting a given type of increase. The report panel looks like this:

The screenshot shows the 'Empl By Increase Type' report panel. At the top, there is a 'Run Control ID' field with the value 'test'. To the right are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below this is a search area for 'For This Company' and a 'Salary Plan' dropdown menu. The 'For These Increases' section has four radio button options: PBI, PBLSP, SCI, and JOB. A 'Reset Sort Seq#' button is highlighted with a yellow box. To the right, there are three 'Sort' buttons for 'Department', 'Mail Drop ID', and 'Job Code'. A 'Select These Subgroups (optional)' section contains three search fields.

### 10A: Type of Increase

In the middle of the screen on the left side of the panel is the **For These Increases** section:

The close-up shows the 'For These Increases' section with four radio button options: PBI, PBLSP, SCI, and JOB.

The only selection you can make is **PBI**. This will produce a list of all employees in the agency (or requested department, mail drop, or job code) that are receiving a PBI.

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## 10B: Sorts and Subgroups

Push Buttons to Select Desired Sort Sequence Press the "Reset Button" to Start Over <input type="button" value="Reset Sort Seq#"/>	Select These Subgroups [optional]	Then Sort By	
	<input type="text"/>	<b>Department</b>	<input type="button" value="Sort"/>
	<input type="text"/>	<b>Mail Drop ID</b>	<input type="button" value="Sort"/>
	<input type="text"/>	<b>Job Code</b>	<input type="button" value="Sort"/>

For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Salary/Employee by Increase Type** report allows you to subgroup by job code. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).

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## Section 11 – Running a Report

To run a report, just click on the **Run** icon at the top of the screen:

The screenshot shows a web form titled "Empl By Increase Type". At the top right, there are three buttons: "Report Manager", "Process Monitor", and "Run". A red arrow points to the "Run" button. Below the buttons, there are several input fields and radio buttons for configuring the report run.

Next, the **Process Scheduler Request** window will appear:

The screenshot shows the "Process Scheduler Request" window. The "Server Name" field is circled in red and contains the value "PSUNX". The "Process List" table below has a checkmark in the "Select" column for the first row, which is circled in green. The "Type" dropdown menu in the same row is circled in blue and shows "File" selected.

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	Employees By Increase Type	PER542X	SQR Report	File	LP

Make sure the **Server Name** is set to **PSUNX** (**Section 1**). Check the box at the bottom of the window to make sure you are running the correct report (**Section 2**). Finally, use the **Type** field to select the type of output you want to generate for this job (**Section 3**). Your choices are **File** or **Web**. **File**: Enables you to write the output to a file that will appear in the Output Destination (Document Direct). **Web**: Sends all output of the process to the report repository, including log and trace files (Local Printer).

You may want to print this screen so you can look back at it later. Once everything looks right, click **OK** and the report will run. After a little while, open the **Reports** section of **Document Direct**<sup>2</sup> and your report should be there.

For additional information regarding Running Reports, go the PeopleSoft UPK (User Productivity Kit) tool at <https://route88upk.state.ga.us>.

<sup>2</sup> If you encounter problems accessing your reports through Document Direct, contact the PeopleSoft HCM Support Team at 404-657-3956 or 1-888-896-7771 Option 2, then 1.