

Mass Entry in PeopleSoft: Creating and Interpreting Reports



September, 2012

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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 reports: **Employee Review Audit**, **Employees by Increase Rating/Recommendation**, **Preliminary Exception List** or **Performance Evaluation Documentation Report (Salary Increase List)**.



← **Performance Evaluation Documentation Report**

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 Reports

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

The screenshot shows a report panel with the following elements:

- Run Control ID:** A text field containing "test" with a red "1" next to it.
- Company:** A section labeled "For This Company:" with a search icon and a red "2" next to it.
- Salary Plan:** A scrollable area with a search icon and a red "3" next to it. The scroll area shows a list of salary plans: "Leave", "Salary Plan", "blank for", "combination", and "SWD, SRE, MD1".
- Buttons:** "Report Manager", "Process Monitor", and "Run" are visible at the top right.

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 report panel with the following elements:

- Menu:** A list of reports including "Employee Review", "Audit", "Employees by Inc", "Rating/Recmg", "Preliminary Exception List", and "Salary Increase List". A red arrow points to "Performance Evaluation Documentation Report".
- Search Area:** A section with the text "Enter any information you have and click Search. Leave fields blank for a list of all values." and buttons for "Find an Existing Value" and "Add a New Value".
- Run Control ID:** A dropdown menu set to "begins with" and a text input field. A red arrow points to the input field.
- Buttons:** "Search", "Clear", "Basic Search", and "Save Search Criteria" are visible.

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The following prompt window will appear:

The screenshot shows a prompt window with two tabs: "Find an Existing Value" (selected) and "Add a New Value". Below the tabs is a text input field labeled "Run Control ID:". Below the input field is a yellow "Add" button. At the bottom of the window, there are two blue links: "Find an Existing Value" and "Add a New Value".

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 three digit 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. If you have more than one agency, you may also click on the look up  button, find the agency, and click on it.

The screenshot shows a prompt window with a label "*For This Company:" followed by a text input field and a magnifying glass icon.

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.

The screenshot shows a "Salary Plan:" section with a text input field and a magnifying glass icon. To the right of the input field, the text reads: "Leave Salary Plan blank for combination SWD, SRE, MD1". There are plus and minus buttons next to "Salary Plan".

Below this is a "Look Up Salary Plan" dialog box. It has fields for "SetID:" (with "SHARE" selected) and "Description:" (with "begins with" selected). There are "Look Up", "Clear", and "Cancel" buttons, and a "Basic Lookup" link.

Below the dialog box is a "Search Results" table with the following data:

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
482	TRB Staff Salary Plan	USD	(blank)
922	GA World Congress Center Auth	USD	922
977	GA Public Broadcasting Sal Plan	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.

The screenshot shows the PeopleSoft Report Manager interface. At the top, there are tabs for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below this, the 'Run Control ID' is set to 'test'. On the left, there is a search field for 'For This Company'. The main area displays a 'Salary Plan' dropdown menu. The dropdown is open, showing a list of options: 'Leave Salary Plan blank for combination SWD, SRE, MD1'. The 'CHW' option is circled in red. To the right of the dropdown, there are '+', '-', and 'Delete Row' icons. A red arrow points to the '+' icon, indicating the 'Insert Row' action.

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 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 4 – 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:

The screenshot shows the 'Employees by Inc Ratng/Recmdtn' report panel. At the top, there is a 'Run Control ID' field with the value 'test' and a 'Run' button. Below this, there are links for 'Report Manager' and 'Process Monitor'. The main area is divided into several sections:

- '*For This Company:' with a search icon.
- 'Overall Rating' section with checkboxes for 1, 2, 3, 4, 5, and N.
- 'Recommendation' section with radio buttons for 'Rated', 'None', and 'All'. A red arrow points to the 'None' radio button.
- 'Push Buttons to Select Desired Sort Sequence' section with a 'Reset Sort Seq#' button.
- 'Select These Subgroups [optional]' section with three search fields and 'Sort' buttons for 'Department', 'Mail Drop ID', and 'Job Code'.
- 'Salary Plan' dropdown menu with options: Leave, Salary Plan, blank for combination, SWD, SRE, MD1.

4A: Overall Rating

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

The close-up shows the 'Overall Rating' section with the following checkboxes:

- 1
- 2
- 3
- 4
- 5
- N
- All

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 ratings).

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4B: Recommendation

Note: The “Increase Recommendation” field does not apply for employees on SWD, SRE or MD1 salary plans in the PS Mass Entry Pages as performance increase funding was not appropriated for the executive branch agencies.

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

Recommendation

Rated None

All

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.

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.

4C: Sorts and Subgroups

Push Buttons to Select
Desired Sort Sequence
Press the "Reset Button"
to Start Over

Select These Subgroups
[optional]







Then Sort By

Department

Mail Drop ID

Job Code

For the most part, the sorting and sub grouping features function the same way they do for the **Performance Evaluation Documentation Report (Salary Increase List)** on report menu - see sections **6A** and **6B**). 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 5 – 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:

*The “Recommendation” field does not apply to employees on SWD, SRE or MD1 salary plans in the PS Mass Entry Pages.

5A: Sorts and Subgroups

For the most part, the sorting and sub grouping features function the same way they do for the **Performance Evaluation Documentation Report (Salary Increase List** on report menu - see sections **6A** and **6B**). 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 6 – Performance Evaluation Documentation Report (Salary Increase List on Report Menu)

The **Performance Evaluation Documentation Report (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 **Performance Evaluation Documentation Report (Salary Increase List)** panel looks like this:

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.

6A: 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.

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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.

On the bottom left side of the **Performance Evaluation Documentation Report (Salary Increase List)** panel, you will see a section that appears on the 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.

6B: 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 7 – Running a Report

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

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

Process Scheduler Request

User ID: GMSJDH Run Control ID: test

Section 1 Server Name: PSUNX Run Date: 08/01/2005 Run Time: 10:23:28AM

Recurrence: Time Zone:

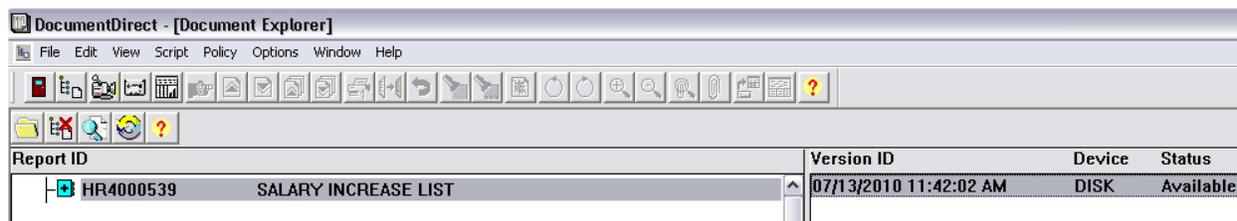
Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	Employees By Increase Type	PER542X	SQR Report	File	LP

Section 2 **Section 3**

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).

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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**² and your report should be there.



The screenshot shows the DocumentDirect interface with a table of reports. The table has four columns: Report ID, Version ID, Device, and Status. One report is listed: HR4000539, SALARY INCREASE LIST, with a version ID of 07/13/2010 11:42:02 AM, stored on a DISK, and is Available.

Report ID	Version ID	Device	Status
HR4000539 SALARY INCREASE LIST	07/13/2010 11:42:02 AM	DISK	Available

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

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