

Reporting Resources at WMU

Budget

Human Resources

Payroll

Fall 2015



WESTERN MICHIGAN UNIVERSITY

The Importance of Reviewing Your Data

Why?

Who?

What?

When?

How?

Agenda

Your Presenters

How to Get Access

For Each Area:

- Available Reports
- When & How to Use
- User Guide Info

Excel Tips & Tricks

The “All Access” Authorization

- Form available via HR web site at:
<http://www.wmich.edu/hr/forms/access>
- Authorizing signatures are needed and some depend on report requested
- Request PeopleSoft access for the following:
 - Budget
 - Grants
 - Human Resources
- Payroll access forms available via Payroll web site

Budget

Available Reports



- Pay Earnings
- Personnel List
- Permanent Base Budget
 - Detail
 - Summary
- Reallocation Data Comparison

Budget

Pay Earnings Report (PeopleSoft HR)



- Provides Departments with a Detail Listing of Payroll Expense by Employee for Each Pay Period
- Designed to Help Departments Reconcile Payroll Accounts Against GLOW

WESTERN MICHIGAN UNIVERSITY
PAY EARNINGS LIST

Report ID: WMUBD003

Run ID Range: V48 06/07/2015 to SM1513 06/30/2015

Cost Center:

Page No. 1

Run Date 11/02/2015

Run Time 14:54:19

Department Name

Employee Name =====	EmplId =====	PP =====	Pay End Dt =====	FTE ===	Comp Rate =====	<--- REGULAR ---->		<-- OVERTIME ---->		<--- OTHER ---->		Total	<--- SICK ---->		<--- VACATION -->	
						Hours	Earnings	Hours	Earnings	Hours	Earnings	Earnings	Used	Balance	Used	Balance
Object Code: 3141																
		V48	06/07/2015	1.25	107,484.00	80.00	4,134.00					4,134.00				
		SM1512	06/14/2015			40.00	2,067.00					2,067.00				
		SM1513	06/30/2015			96.00	4,478.50					4,478.50				
===> Employee Total						216.00	10,679.50	0.00	0.00	0.00	0.00	10,679.50	0.00	782.40	0.00	24.00
===> Object Code Total 3141						216.00	10,679.50	0.00	0.00	0.00	0.00	10,679.50	0.00	782.40	0.00	24.00
Object Code: 3192																
		V48	06/07/2015	0.12	2,916.00	40.00	694.28					694.28				
		V50	06/21/2015			40.00	694.29					694.29				
===> Employee Total						80.00	1,388.57	0.00	0.00	0.00	0.00	1,388.57	0.00	0.00	0.00	0.00
		V48	06/07/2015	0.12	2,916.00	40.00	694.28					694.28				
		V50	06/21/2015			40.00	694.29					694.29				
===> Employee Total						80.00	1,388.57	0.00	0.00	0.00	0.00	1,388.57	0.00	0.00	0.00	0.00
===> Object Code Total 3192						160.00	2,777.14	0.00	0.00	0.00	0.00	2,777.14	0.00	0.00	0.00	0.00
Object Code: 3216																
		V48	06/07/2015	1.25	107,484.00						320.00	320.00				
===> Object Code Total 3216						0.00	0.00	0.00	0.00	0.00	320.00	320.00	0.00	782.40	0.00	24.00
Object Code: 3311																
		V48	06/07/2015	1.00	27.30	72.00	1,965.60			8.00	218.40	2,184.00	16.00			
		V50	06/21/2015			80.00	2,184.00					2,184.00			40.00	
===> Employee Total						152.00	4,149.60	0.00	0.00	8.00	218.40	4,368.00	16.00	434.44	40.00	24.00

Budget

Pay Earnings Report – Helpful Tips

- Run ID – Must begin with a letter
 - Biweekly letter changes each year (located on pay schedules & GLOW description - Example: W08, W10)
 - Semimonthly letter does not change (3rd & 4th digit represents calendar year – Example: SM1520, SM1521)
- Must include fund – department – account (including dashes) in account code prompts
- Run report button not available until save button is selected
- If screen times out, report is still running. Access through PeopleTools > Process Scheduler > Process Monitor



Budget

Personnel List



Permanent Base Budget Summary

Permanent Base Budget Detail

Reallocation Data Comparison

(PeopleSoft Financials)

- Provides Reports Designed to Help Departments Monitor Their Permanent Budgets

Budget

Personnel List (PeopleSoft Financials)



- Used to Compare Employee Job Data to Permanent Budget by Position
- Only Shows Positions with a Permanent Budget Attached
- Temporary and Student Employee Data Does Not Appear

Department Name

FUND	DEPTID	ACCOUNT	POS#	EMPLID	REC#	NAME	GRADE	SAP	LEDGER AMOUNT	STAT AMOUNT	COMP RATE	ABBR	PTE	CONT/TERM	STATUS
11		3111			0		I20	002	80,046.00	1.00	80,046.00	80,046.00	1.00	Continuing	A
					0		I10	002	103,310.00	1.00	103,310.00	103,310.00	1.00	Continuing	A
11		3111	Totals						183,356.00	2.00		183,356.00	2.00		
11		3112			0		I20	002	74,460.00	1.00	74,460.00	74,460.00	1.00	Continuing	A
					0		I10	002	129,493.00	1.00	129,493.00	129,493.00	1.00	Continuing	A
					0		I10	002	117,422.00	1.00	117,422.00	117,422.00	1.00	Continuing	A
					0		I30	002	60,750.00	1.00	60,750.00	60,750.00	1.00	Continuing	A
					0		I10	002	134,457.00	1.00	134,457.00	134,457.00	1.00	Continuing	A
					0		I20	002	74,460.00	1.00	74,460.00	74,460.00	1.00	Continuing	A
11		3112	Totals						591,042.00	6.00		591,042.00	6.00		
11		3145			0		FSM	013	83,673.00	1.00	83,673.00	83,673.00	1.00	Continuing	A
					0		FSM	013	73,013.00	1.00	73,013.00	73,013.00	1.00	Continuing	A
					0		FSM	013	84,614.00	1.00	84,614.00	84,614.00	1.00	Continuing	A
					0		FS2	013	58,670.00	1.00	58,670.00	58,670.00	1.00	Continuing	A
					0		FSM	013	101,116.00	1.22	101,116.00	101,116.00	1.22	Continuing	A
					0		FSM	013	103,745.00	1.25	103,745.00	103,745.00	1.25	Continuing	A
11		3145	Totals						504,831.00	6.47		504,831.00	6.47		
11		3231			0		CH	003	148,026.00	1.00	130,000.00	130,000.00	1.00	Terminal	A
11		3231	Totals						148,026.00	1.00		130,000.00	1.00		
11		3311			0			005	41,745.00	1.00	20.07	41,745.60	1.00	Continuing	A
					0			005	35,484.00	1.00	17.06	35,484.80	1.00	Continuing	A
11		3311	Totals						77,229.00	2.00		77,230.40	2.00		

Budget

Permanent Base Budget Summary (PeopleSoft Financials)

- Provides a Summary of the Permanent Budget by Account for Each Department



11

Department

<u>Account</u>	<u>Description</u>	<u>Budget Amount</u>	<u>Stat Amount</u>
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3110	Budget Allocation	111,491.00	0.00
3111	Fac Academic Year-26PP	94,514.00	1.00
3141	Fac Fiscal Year-26Pp	1,884,973.00	27.50
3171	Faculty Oth-Irregular 1PP	12,000.00	0.27
3211	Administrative Staff	566,549.00	10.00
3221	Unclassified Staff-Admin	419,709.00	3.00
3311	Support Staff-Clerical	1,420,406.00	36.00
3511	Regular Student	635,954.00	37.51
3713	Non-Retirement Eligible	14,434.00	0.50
3911	Soc Sec (FICA)-WMU Share	346,092.00	0.00
3912	TIAA/CREF&MPSERF Retirement	757,853.00	0.00
3927	Fringe Benefits	1,262,371.00	0.00
Subtotal		7,526,346.00	115.78

4160	Budget-Fees/Comp/Contracts	20,083.00	0.00
4174	Budget-Postage/Freight	41,152.00	0.00
4180	Budget-Supplies	62,725.00	0.00
4190	Budget-Transportation/Travel	2,476.00	0.00
4194	Budget-Equipment	2,964.00	0.00
Subtotal		129,400.00	0.00

Total Amount:		7,655,746.00	115.78
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Budget

Permanent Base Budget Detail (PeopleSoft Financials)

- Provides a Detail Listing of Permanent Budget Adjustments by Position and Account for each department



Pund Code	Dept Id	Account Code	Date	Journal Id	Description	Amount	Hdr Source	Stat Amount	Scenario
11		3111	07-31-2014	0000314727	2014/15 BOOKED BUDGET	53,308.00	BKG	0.00	1244
11		3111	07-31-2014	0000314728	2014/15 BOOKED BUDGET	0.00	BKG	1.00	1244
11		3111	11-14-2014	0000319956	2014-15 FACULTY ATB INCRE	1,066.00	BES	0.00	1244
11		3111	01-22-2015	0000322801	14-15 FAC MID-YR INCR	306.00	BES	0.00	1244
11		3111	07-31-2015	0000336435	FUND EQUITY #1244	1,000.00	BWB	0.00	1244
11		3111	07-31-2015	0000336096	2015-16 AY FACULTY INCREA	1,094.00	BES	0.00	1244
		Subtotal for Scenario		1244		56,774.00		1.00	
11		3111	07-31-2014	0000314727	2014/15 BOOKED BUDGET	64,649.00	BKG	0.00	5270
11		3111	07-31-2014	0000314728	2014/15 BOOKED BUDGET	0.00	BKG	1.00	5270
11		3111	11-14-2014	0000319956	2014-15 FACULTY ATB INCRE	1,293.00	BES	0.00	5270
11		3111	01-22-2015	0000322801	14-15 FAC MID-YR INCR	376.00	BES	0.00	5270
11		3111	07-31-2015	0000336096	2015-16 AY FACULTY INCREA	1,326.00	BES	0.00	5270
		Subtotal for Scenario		5270		67,644.00		1.00	
11		3111	07-31-2014	0000314727	2014/15 BOOKED BUDGET	91,810.00	BKG	0.00	5271
11		3111	07-31-2014	0000314728	2014/15 BOOKED BUDGET	0.00	BKG	1.00	5271
11		3111	11-14-2014	0000319956	2014-15 FACULTY ATB INCRE	1,836.00	BES	0.00	5271
11		3111	11-14-2014	0000319956	2014-15 FACULTY AWD INCRE	2,000.00	BES	0.00	5271
11		3111	01-22-2015	0000322801	14-15 FAC MID-YR INCR	505.00	BES	0.00	5271
11		3111	07-31-2015	0000336096	2015-16 AY FACULTY INCREA	1,883.00	BES	0.00	5271
11		3111	07-31-2015	0000336437	OVERFUNDED FAC AWARD POS.	-2,000.00	BWB	0.00	5271
		Subtotal for Scenario		5271		96,034.00		1.00	
11		3111	07-31-2014	0000314728	2014/15 BOOKED BUDGET	0.00	BKG	1.00	5275
11		3111	07-31-2014	0000314727	2014/15 BOOKED BUDGET	63,105.00	BKG	0.00	5275
11		3111	11-14-2014	0000319956	2014-15 FACULTY ATB INCRE	1,262.00	BES	0.00	5275
11		3111	01-22-2015	0000322801	14-15 FAC MID-YR INCR	376.00	BES	0.00	5275
11		3111	04-01-2015	0000326925	14-15 ATB RNDG#5275	1.00	BUD	0.00	5275
11		3111	07-31-2015	0000336096	2015-16 AY FACULTY INCREA	1,295.00	BES	0.00	5275
		Subtotal for Scenario		5275		66,039.00		1.00	
11		3111	07-31-2014	0000314727	2014/15 BOOKED BUDGET	72,387.00	BKG	0.00	5276
11		3111	07-31-2014	0000314728	2014/15 BOOKED BUDGET	0.00	BKG	1.00	5276
11		3111	11-14-2014	0000319956	2014-15 FACULTY ATB INCRE	1,448.00	BES	0.00	5276
11		3111	01-22-2015	0000322801	14-15 FAC MID-YR INCR	505.00	BES	0.00	5276
11		3111	07-31-2015	0000335844	15/16 EQUITY#5276	9,774.00	BWB	0.00	5276
11		3111	07-31-2015	0000336096	2015-16 AY FACULTY INCREA	1,487.00	BES	0.00	5276
		Subtotal for Scenario		5276		85,601.00		1.00	
11		3111	07-31-2014	0000314728	2014/15 BOOKED BUDGET	0.00	BKG	1.00	5279
11		3111	07-31-2014	0000314727	2014/15 BOOKED BUDGET	63,105.00	BKG	0.00	5279
11		3111	11-14-2014	0000319956	2014-15 FACULTY ATB INCRE	1,262.00	BES	0.00	5279
11		3111	01-22-2015	0000322801	14-15 FAC MID-YR INCR	376.00	BES	0.00	5279
11		3111	07-31-2015	0000336096	2015-16 AY FACULTY INCREA	1,295.00	BES	0.00	5279
		Subtotal for Scenario		5279		66,038.00		1.00	
11		3111	07-31-2014	0000314728	2014/15 BOOKED BUDGET	0.00	BKG	1.00	5284

Budget

Reallocation Data Comparison (PeopleSoft Financials)

- Preliminary Base Budget with 3 Years of Actual History for Budget Planning Analysis



Western Michigan University
OFFICE OF UNIVERSITY BUDGETS
BUDGET REALLOCATION DATA COMPARISON WORKSHEET
General Fund 11
Budget Reference FY2017

Department Name	Object Code	2016/2017 Prelim. Budget Allocation	***** * Work Area * *****	2015/2016 Actual Expense July 1 to June 30	2014/2015 Actual Expense July 1 to June 30	2013/2014 Actual Expense July 1 to June 30
	----	-----		-----	-----	-----
Budget-Printing/Duplicating	4176	5,000		0.00	0.00	0.00
Printing/Duplicating	4482	0		630.72	5,527.26	1,525.99
Oth Exp-Publications&Catalogue	4484	0		0.00	590.28	0.00
		-----		-----	-----	-----
Subtotal-Printing-Duplication :	SUB-TOTAL	5,000		630.72	6,117.54	1,525.99
Budget-Telephone	4186	3,000		0.00	0.00	0.00
Telephone&Telegraph-General	4210	0		90.62	329.53	104.57
Telecom-Station Charges	4211	0		270.00	1,080.00	1,083.00
Telecom-Miscellaneous Charges	4214	0		536.29	2,153.53	1,754.22
		-----		-----	-----	-----
Subtotal-Telephone :	SUB-TOTAL	3,000		896.91	3,563.06	2,941.79
Budget-Postage/Freight	4174	2,000		0.00	0.00	0.00
Postage	4340	0		355.26	1,484.36	2,406.37
		-----		-----	-----	-----
Subtotal-Postage-Freight :	SUB-TOTAL	2,000		355.26	1,484.36	2,406.37
Budget-Public Relations	4178	3,000		0.00	0.00	0.00
Memberships	4331	0		9,266.00	3,750.00	3,350.00
Advertising	4333	0		0.00	0.00	2,716.00
		-----		-----	-----	-----
Subtotal-Public Relations :	SUB-TOTAL	3,000		9,266.00	3,750.00	6,066.00
Budget-Supplies	4180	30,000		0.00	0.00	0.00
Computer Software	4452	0		0.00	664.89	0.00
Oth Exp-Office Supplies	4481	0		1,201.20	3,914.23	944.04
Oth Expenses Technical	4494	0		0.00	1,295.00	3,160.83
Supplies	4570	0		5,843.47	13,751.62	20,084.55
		-----		-----	-----	-----
Subtotal-Supplies :	SUB-TOTAL	30,000		7,044.67	19,625.74	24,189.42
Budget-Transfers/Support	4188	1,000		0.00	0.00	0.00
		-----		-----	-----	-----
Subtotal-Transfers-Support :	SUB-TOTAL	1,000		0.00	0.00	0.00
Budget-Transportation/Travel	4190	10,000		0.00	0.00	0.00
Out-State Travel&Subsistence	4359	0		0.00	0.00	92.00
In-State Travel&Subsistence	4360	0		4,576.25	878.27	4,231.38
Meals&Entertainment	4364	0		2,201.20	12,019.39	7,492.55
Conferences	4370	0		1,350.00	2,185.00	2,627.50
Transportation	4988	0		354.26	0.00	45.90

Budget

Budget Reporting– Helpful Tips



- Tree node is specific to a fund
- Budget Reference: Use FY followed by year – no spaces
 - Current Perm Budget = Fiscal Year Building (not necessarily current fiscal year)
- View all permanent budget data within your security
 - WMU Begin Deptid = 0000000 and WMU End Deptid = 9999999
- View permanent budget data for specific department
 - WMU Begin Deptid = 1234560 and WMU End Deptid = 1234560
- Report type and format for Excel = Web/CSV
- Select REFRESH button until status shows success

Budget

- User Guide

www.wmich.edu/budget/resources



- Questions

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Human Resources

Available Reports

- Management Data Report
 - Timekeepers Report
 - Electronic workflow



Management Data Report



What is it?

The Management Data Report contains job information for all active jobs in a department, college or executive area

Includes faculty, staff, part-time instructors, temporary staff, graduate assistants, and student employees. The report includes both primary and secondary job(s), so an employee with multiple jobs in an area will have multiple rows on the spreadsheet

Sample Management Data Report

Executive Area	College	Department	Name	Employee ID	Employee Record#	Employee Status	Pay Group	Job Indicator	Salary Administration Plan
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Bronco, Buster	1903	1	Leave	SM1	Primary	Professional/Administrative
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Bronco, Bette	1911	4	Active	Staff	Secondary	Add'l AAUP Appt
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Westernette, Bette	1904	0	Active	SM1	Primary	Chairperson
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Hayes, Maize	1912	0	Active	SM1	Primary	Part-Time Instr - PIO
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Bronco, Bette	1904	0	Active	Staff	Primary	Faculty Regular (AAUP)
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Birdsong, Birdie	1914	1	Active	Staff	Primary	Clerical/Technical
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Bunco, Bingo	1905	2	Active	SM1	Primary	Faculty Specialist (AAUP)
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Brown, Bunni	1900	1	Active	Student	Primary	GA-Resrch Application
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Stallion, Bette	1907	1	Active	Staff	Primary	Temporary Clerical/Technical
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Gold, Starr	1908	0	Active	SM1	Primary	Exec/Sr Admin Officer
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Hall, Bingo	1909	1	Active	SM1	Primary	Part-time Instr - Non PIO
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Western, Buster	1920	0	Active	SM1	Primary	Exec/Sr Admin Officer
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Pinto, Ben	1910	0	Active	Student	Primary	Student Employee
Provost & VP Academic Affairs	College Of Cheer	Spirit Activities	Pinto, Ben	1910	1	Active	Student	Secondary	Student Employee

Sample Report Continued

Title	Grade	Step	Regular/Temporary	Continuing/Terminal	Appointment Period	Appt End Dt	Termination Dt	Seniority Dt (Hire dt)	Seniority Yrs	Benefits Service Dt	Benefits Service Yrs	Standard Work Hours
Dir Cheers	I		Regular	Continuing	100-Fiscal Year			10/15/2014	1	2/19/1996	19	40
Individualized Assignment Fac	FS2		Temporary	Terminal	100-Fiscal Year		7/1/2016					
Chairperson Cheers	CH		Regular	Continuing	100-Fiscal Year			8/26/1999	15	8/26/1999	15	40
PIO Non Continuing PTime Ins-2	PT2		Temporary	Terminal	300-Fall Semester		1/1/2016	8/17/2015	0	8/17/2015	0	10.67
Assoc Prof-Cheers Science	I20		Regular	Continuing	200-Academic Year			12/24/1990	24	12/24/1990	24	40
Cheers Tech	D		Regular	Continuing	100-Fiscal Year			3/22/2004	11	3/22/2004	11	40
MFS-Cheers Specialist	FSM		Regular	Continuing	100-Fiscal Year			5/30/1995	20	5/30/1995	20	40
GA/DA-Grad Assistantshp-2	FUL		Temporary	Terminal	450-Summer II		8/26/2015					20
Temporary Non-Exempt	N99		Temporary	Terminal	100-Fiscal Year		7/1/2016	9/19/2002	12	9/19/2002	12	10
Exec Dir Cheer Operations	Z2		Regular	Continuing	100-Fiscal Year			8/25/2003	11	8/25/2003	11	40
Non PIO Part Time Instr-1	PT1		Temporary	Terminal	300-Fall Semester		1/1/2016	4/19/1999	16	4/19/1999	16	5.33
Dean	Z2		Regular	Continuing	100-Fiscal Year			8/25/2003	11	8/25/2003	11	40
Stu-Office Asst	B	3	Temporary	Terminal	100-Fiscal Year							
Stu-Activity Asst	B	3	Temporary	Terminal	100-Fiscal Year							

Sample Report Continued

FTE	Fund	GL Dept	Account	Status	FICA Frequency	Compensation Rate (Pay)	Job Last Pay End Dt	Work Study	Supervisor Descr	Reports to Incumbent	Position Number	Jobcode	WIN	Email Address
1.00	11	1260300	3211	Subject	Annual	83,028.00	7/31/2015	N	Supv of SCS only-perf	Westernette, Bette	0000BB3	6580	999999999	buster.b.bronco@wmich
	23	0011850	3155	Subject	Hourly	18.25	7/19/2015	N				15026	999999999	buster.b.bronco@wmich
1.00	11	1260100	3231	Subject	Annual	115,209.00	7/31/2015	N	Supv of SCS only-perf	Green, Tim	0000B103	9741	999999999	bb.bronco@wmich.edu
0.13	11	1260100	3161	Subject	Contract	4,200.00	7/31/2015	N				7476	999999999	bb.bronco@wmich.edu
1.00	11	1260100	3111	Subject	Contract	95,987.00	7/19/2015	N	Non-Supervisory	Westernette, Bette	0000B190	8780	999999999	bb.bronco@wmich.edu
1.00	11	1260300	3311	Subject	Hourly	21.26	7/19/2015	N	Non-Supervisory	Westernette, Bette	0000BB11	4650	999999999	bb.bronco@wmich.edu
1.25	11	1260400	3145	Subject	Annual	81,414.00	7/31/2015	N	Non-Supervisory	Westernette, Bette	0000B303	9819	999999999	buster.b.bronco@wmich
0.12	11	4260620	3192	Exempt	Contract	2,916.00	7/19/2015	N				GRAGA2	999999999	buster.b.bronco@wmich
0.10	23	0011840	3631	Subject	Hourly	10.00	7/19/2015	N				15001	999999999	buster.b.bronco@wmich
1.00	11	4260600	3221	Subject	Annual	138,538.00	7/31/2015	N	Non-Supervisory	Westernette, Bette	0000B004	9859	999999999	bb.bronco@wmich.edu
0.07	11	1260100	3161	Subject	Contract	2,100.00	7/31/2015	N				7420	999999999	buster.b.bronco@wmich
1.00	11	4260600	3221	Subject	Annual	202,037.00	7/31/2015	N	Supv of SCS only-perf	Westernette, Bette	0000BB15	9790	999999999	bb.bronco@wmich.edu
	23	0011840	3511	Exempt	Hourly	8.57	7/5/2015	Y				60038	999999999	bb.bronco@wmich.edu
	23	0011840	3511	Exempt	Hourly	8.57	7/5/2015	Y				60000	999999999	bb.bronco@wmich.edu

Management Data Report



How Do I Use?

- Data reflects the As Of Date used to run the report (e.g. if you run it 11/18/2015, the data will be reflective of 11/18/2015)
- You can run the report for future dates
- Excel spreadsheet options allow various filters & sorts
- Use to verify personnel actions:
 - Pay Changes
 - Promotions/Transfers
 - Employee Status (Active, Leave)
 - Employee/Position Attributes

Management Data Report



How Do I Use?

- Use to verify employee identifying info:
 - Employee ID
 - Hire (Company Seniority) Date
 - Terminal Appointment End Date
 - Employee WIN
 - Employee email address
 - Pay
 - Reports To
 - Last Pay Date

Management Data Report



Users Guide

- Data Dictionary
 - Data definitions and values
- Program Run Instructions
 - Detailed
 - Quick click

www.wmich.edu/hr/officemanagement/reporting

PeopleSoft Timekeepers Report

What is It?

- Assists timekeepers with processing payroll
- Shows students and temporary employee data from PeopleSoft
- Data fields:



Name, Empl ID, Job #, Effective Date, Job Indicator, Kronos Job Indicator, WIN, Job code, Title, Grade, Step, Comp Rate, Annual Base Pay, Account Code, FICA status, Work Study, Termination Date, I9 Date

PeopleSoft Timekeepers Report

The How

- You must be a Kronos Timekeeper
- Fill out the PeopleSoft Information Access Authorization form

<http://www.wmich.edu/hr/forms/access>

User Guide:

<http://www.wmich.edu/hr/officemanagement/reporting>

Workflow Reports

What are they?



- The Workflow reports
 - **Approval Rules:** Allows users to view the existing electronic workflow approval rules (process) for their area.
 - **Temporary Appointment/Incidental Pay (IP) Spreadsheet:** Generates a spreadsheet listing all temporary appointments and IP forms processed.

Workflow Reports

Why Should I Use These?



- **Approval Rules:** Use this report to determine your initiator and approval position numbers and routing sequence
- **Temporary Appointment /Incidental Pay Spreadsheet:** a snapshot of temp appointment or incidental pay (IP) forms and their status (e.g. routed, authorized, recycled, denied)

Workflow Reports

User's guide



- **PSHR electronic workflow:**

User Guide – Reports

- **Found on HR's website at:**

www.wmich.edu/hr/officemanagement/workflow

wmhr504 –Workflow Form Approvals

DataBase : HPR
Report ID: WMUHR504

WESTERN MICHIGAN UNIVERSITY
PSHR ELECTRONIC WORKFLOW FORM APPROVALS

Page No. 1
Run Date 11/10/2015
Run Time 09:56:20

WMU Form Type: TA Temp Faculty/Staff A College: COLLEGE~~X~~ College Of X & X
Effective Date: 08-05-2015 Status: Active

WMU Approval Step: Approver Level 1

Sequence	Position	Position Title	Name
1	0000XXXX	XXXXXXXXXXXXXXXXXX	XXXXX XXXXXXXXXXXXXXXX
2	0000XXXX	XXXXXXX	XX XXXXX
3	0000XXXX	XXXXXXXXXX	XXXXX XXXXXXXXXXXX
4	0000XXXX	XXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX

WMU Approval Step: Approver Level 2

Group Email Box Address: XXXX-XXXX@wmich.edu

Sequence	Position	Name
1	0000XXXX	XXXX XXXXXXXX
2	0000XXXX	XX XXXXXXXXXXXX
3	0000XXXX	XXXXX XXXXXXXX
4	0000XXXX	XXX XXXXXXXX
5	0000XXXX	XXXXX XXX
6	0000XXXX	XXXXXXXXXX XX
7	0000XXXX	XXXXXXXXXX XXXX

WMU Approval Step: HR Processing

Sequence	Position	Name
1	0000XXXX	Human Resources Asst Sr XXXXXXXX XXX
2	0000XXXX	Human Resources Asst Sr XXXXXXX XXXXXXX
3	0000XXXX	Coord HRMS XXXXXXX XXXXX
4	0000XXXX	Human Resources Asst Sr XXXXXXX XXXXXXX
5	0000XXXX	Human Resources Asst Sr XXXX XXXXXXXX
6	0000XXXX	Human Resources Asst Sr XXXXXXXXXXX XXX

WMU Approval Step: HR Representative

Sequence	Position	Name
1	0000XXXX	Human Resources Representative XXXXXXXXXXX XXXX
2	0000XXXX	Human Resources Representative XXXXX XXXXXX
3	0000XXXX	Human Resources Representative XXXXXXX XXXXX
4	0000XXXX	Human Resources Representative XXXXXXX XXXXXXX
5	0000XXXX	Human Resources Representative XXX XXXXXX

WMU Approval Step: Form Initiator

Sequence	Position	Name
1	0000XXXX	XXXXXXXXXXXXXXXXXXXX XXXXXXX XXXXX
2	0000XXXX	XXXXXXXXXXXXXXXXXXXX XXXXXXX XXXXXXX

wmhr503- Temporary Appointments

	A	B	C	D	G	H	I	K	N	O	R	V	W	AM	AN	AO	AP	AQ
1	Form Type	Form #	Status of Form	Status Action Date	EmplID	Last Name	First Name	Empl Type	Appt Type	Appt Type Description	Grade	Appt Begin Date	Appt End Date	Letter Location	Initiator	Initiate Date	Approval Rule Set	WMU APPR Step
2	GRA	60000	Canceled	8/10/2015	333333	Bronco	Buster	S	G13	AY Teaching DA w/ Candidacy Full Appt	FUL	8/17/2015	4/24/2016	(PGC)UCH/GC	Xxxxx, Xxxxx	17-Jul-15	17680	A1
3	GRA	60000	Approved	7/23/2015	444444	Hall	Kohrman	S	G04	AY Teaching GA 1/2 Appt	1/2	8/17/2015	4/24/2016	(PGC)STAT/GC	Xxxxx, Xxxxx	22-Jul-15	DEPT064	A1
4	GRA	60000	Denied	7/23/2015	666666	WMU	Go	S	G08	AY Teaching DGA 1/2 Appt	1/2	8/17/2015	4/24/2016	(PGC)STAT/GC	Xxxxx, Xxxxx	23-Jul-15	DEPT064	A1
5	GRA	60000	Denied	8/3/2015	555555	Robin	Rockin	S	G29	AY Research Application DGA 1/2 Appt	1/2	8/17/2015	4/24/2016	(PGC)TLES/GC	Xxxxx, Xxxxx	23-Jul-15	DEPT077	A1
6	GRA	60000	Loaded to Database	7/27/2015	888888	Gold	Brown	S	G22	AY Research Application GA Full Appt	FUL	8/17/2015	4/24/2016	(PGC)MGMT/GC	Xxxxx, Xxxxx	17-Jul-15	DEPT036	HP
7	GRA	60000	Loaded to Database	7/27/2015	999999	Wellness	Holtyn	S	G22	AY Research Application GA Full Appt	FUL	8/17/2015	4/24/2016	(PGC)ACTY/GC	Xxxxx, Xxxxx	17-Jul-15	DEPT033	HP
8	GRA	60000	Recycled	7/27/2015	222222	Michigan	Kalamazoo	S	G09	AY Teaching DA Full Appt	FUL	8/17/2015	4/24/2016	(PGC)BIOS/GC	Xxxxx, Xxxxx	21-Jul-15	DEPT042	HP
9	GRA	60000	Routed for Approval	7/27/2015	777777	Boat	Row	S	G01	Application TMD 1/2 Appt	1/2	8/17/2015	12/20/2015	(PGC)Hist/GC	Xxxxx, Xxxxx	21-Jul-15	DEPT055	HP

wmhr502 – Incidental Pay

	A	B	C	D	E	F	G	I	J	K	L	M	N	Q	R	S
	WMU Form Type	WMU Form Nbr	Status of Form	Status Action Date	EmplID	First Name	Last Name	Pay Group	Earnin gs Code	Earnings Description	Payment Amount	Payment Combo Code	Payment Department	Initiator	Check Date	Pay Period Paid
1	IP	****	Paid	5/28/2015	XXXXXX	Bronco	Buster	STA	SAW	Staff Award	\$50.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	6/2/2015	V46
2	IP	****	Paid	5/14/2015	XXXX	Hall	Kohrman	STA	MEL	Meal & Energy Allowance	\$39.20	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	5/19/2015	V44
3	IP	****	Paid	5/14/2015	XXXXXX	WMU	Go	STA	FON	Phone Allowance	\$40.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	5/19/2015	V44
4	IP	****	Paid	5/14/2015	XXXXXX	Robin	Rockin	STA	PER	Performance Incentive	\$100.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	5/19/2015	V44
5			Loaded to the database													
6	IP	****	Paid	6/10/2015	XXXXXX	Gold	Brown	STA	PER	Performance Incentive	\$500.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	6/16/2015	V48
7	IP	****	Paid	5/28/2015	XXXXXX	Wellness	Holtyn	STA	GAL	Grad Asst Lump Sum	\$325.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	6/2/2015	V46
8	IP	****	Paid	6/10/2015	XXXXXX	Michigan	Kalamazoo	STA	AUC	Auto Lease Payments	\$100.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	6/16/2015	V48
9	IP	****	Paid	6/24/2015	XXXXXX	Boat	Row	STA	TRG	Training	\$200.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	6/30/2015	V50
10	IP	****	Paid	6/24/2015	XXXXXX	Bronco Jr.	Buster	STA	PER	Performance Incentive	\$300.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	6/30/2015	V50
11	IP	****	Paid	7/8/2015	XXXX	Having	Fun	STA	AAD	Academic Award	\$325.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx	7/14/2015	V52
12	IP	****	Canceled	7/1/2015	XXXXXX	Beverly	Hillbillies	STA	MEL	Meal & Energy Allowance	\$50.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx		
13	IP	****	Canceled	7/10/2015	XXXXXX	Jo	Cool	SM1	FON	Phone Allowance	\$150.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx		
14	IP	****	Denied	8/28/2015	XXXXXX	Semi	Monthly	SM1	FON	Phone Allowance	\$42.07	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx		
15			Routed for Approval													
16	IP	****	Paid	9/25/2015	XXXXXX	Help	Net	SM1	PER	Performance Incentive	\$125.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx		
17			Recycled for ReWork													
18	IP	****	Paid	10/14/2015	XXXX	Mister	Washington	SM1	PER	Performance Incentive	\$50.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx		
19			Loaded to Paysheets													
20	IP	****	Authorized	11/12/2015	XXXXXX	Kala	Mazoo	SM1	PER	Performance Incentive	\$300.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx		SM1522
21	IP	****	Authorized	11/10/2015	XXXX	Bernhard	Center	STU	PER	Performance Incentive	\$200.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx		
22	IP	****	Authorized	11/12/2015	XXXX	Sunshine	Rays	STA	FON	Phone Allowance	\$150.00	XX-XXXXXXX-XXXX	xxxxxxx	Xxxxx, Xxxxx		

Payroll

- How to Get Access

<http://www.wmich.edu/payroll/accounts-payable/forms>

- Timekeeper/Supervisor Form
 - User Guide



Payroll

Available Reports

- PeopleSoft SM Leave History Report
- Kronos Employee Transactions and Totals
- Kronos Time Detail
- Kronos Hours by Labor Account
- Kronos Timecard Sign-Off Request and Approval
- PeopleSoft Timekeepers Report



WMU SEMIMONTHLY LEAVE USAGE

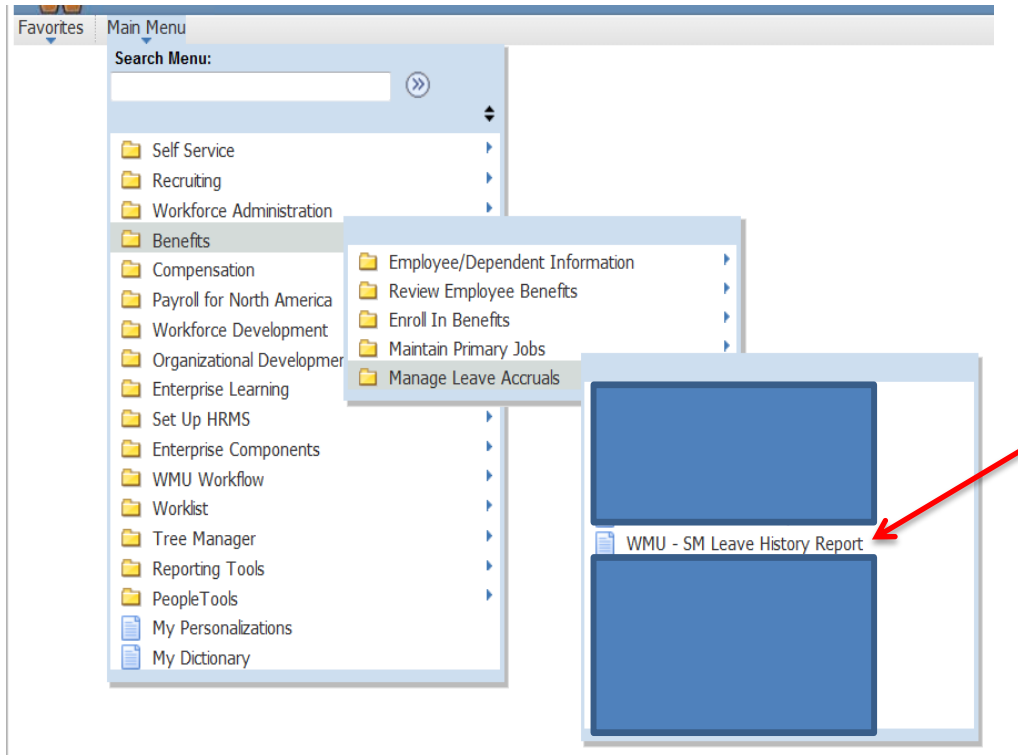
Leave History Report

The Leave History Report may be used by Timekeepers or Administrators to list a historical view of leave time used for semimonthly employees



Semimonthly Leave Usage

Log into PeopleSoft then go into SM Leave History Report:



Semimonthly Leave Usage

*****If this is your first time creating a history report you will need to create a Run Control ID (unique job identifier) that can be reused each time you run a report. Follow the log in procedure above. Click on “Add a New Value”:**

WMU - SM Leave History Report

Find an Existing Value

Add a New Value

Limit the number of results to (up to 300):

Run Control ID:


begins with ▼

☐ Case Sensitive

Search

Clear

Basic Search

 Save Search Criteria

Find an Existing Value

 |

Add a New Value

Semimonthly Leave Usage

You should see this screen:

WMU - SM Leave History Report

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

Run Control ID:

[Add](#)

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

Create a Run Control ID (unique job identifier) that identifies what process you are doing.

We would suggest SM_History (no blank spaces are allowed). Then click "add". This run control can be used each time you run the report.

If you have multiple run controls select your run control from the search results or you will go directly to WMU Run PR111.

Search Results

View All First ◀ 1-3 of 3 ▶ Last

Run Control ID	Language Code
SM_Audits	English
SM_Dir_Dep	English
SM_Hist	English

Once you have created a Run Control ID it can be reused. Type it, or any part of it into the box, click “search”:

Favorites Main Menu > Benefits > Manage Leave Accruals > WMU - SM Leave History Report

WMU - SM Leave History 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](#)

Limit the number of results to (up to 300):

Run Control ID: begins with

☐ Case Sensitive

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

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

The WMU Run PR111 report will appear:

WMU Run PR111

Run Control ID: SM_Hist

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

Filter

Leave Blank for All

Empl ID:

Company:

Organization Code:

Timeframe

Begin/End Dates:

*Begin: 06/08/2015 *End: 06/14/2015

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#)

Enter the appropriate information, including beginning and ending dates for the report you want to create, click on “Run”. You can run this report for one person by entering their EmplId number or leave blank for all.

The next screen you will see is the Process Scheduler Request. The first time you go here you might need to change the Server Name to “PSUNX”, check the select box and make sure your “Type” is web and “Format” is PDF. Click ok.

Process Scheduler Request

User ID: harveyp

Run Control ID: SM_Hist

Server Name: PSUNX

Run Date: 06/24/2015



Recurrence:

Run Time: 4:43:29PM

Reset to Current Date/Time

Time Zone:



Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Semimonthly Leave History Rpt	WMUPR111	SQR Report	Web	PDF	Distribution

OK

Cancel

Click on the Process Monitor

Navigation: Favorites | Main Menu > Benefits > Manage Leave Accruals > WMU - SM Leave History Report

WMU Run PR111

Run Control ID: SM_Hist


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


Process Instance: 921606

Filter

Leave Blank for All



Empl ID:

Company: 

Organization Code: 

Timeframe


Begin/End Dates:


*Begin:  *End: 

“Success” means your report is ready so click on Details:



Process List Server List

View Process Request For

User ID:  Type: Last 99 Days

Server:  Name: Instance: to

Run Status: Distribution Status: ☒ Save On Refresh

Process List Customize | Find | View 100 |   First 1-50 of 362 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	914670		SQR Report	WMUPR111	harveyp	06/24/2015 4:43:29PM EDT	Success	Posted	Details

Click on View Log/Trace:

Process Detail

Process	
Instance: 921606	Type: SQR Report
Name: WMUPR111	Description: Semimonthly Leave History Rpt
Run Status: Success	Distribution Status: Posted

Run	Update Process
Run Control ID: SM_Hist	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSUNX	<input type="radio"/> Cancel Request
Recurrence:	<input checked="" type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 07/14/2015 12:50:02PM EDT	Parameters Transfer
Run Anytime After: 07/14/2015 12:49:57PM EDT	Message Log
Began Process At: 07/14/2015 12:50:12PM EDT	Batch Timings
Ended Process At: 07/14/2015 12:50:17PM EDT	View Log/Trace

OK

Cancel



Click on the PDF file:

View Log/Trace

Report

Report ID: 650901 **Process Instance:** 921606 [Message Log](#)
Name: WMUPR111 **Process Type:** SQR Report
Run Status: Success

Semimonthly Leave History Rpt

Distribution Details

Distribution Node: RPT_DISTNODE1 **Expiration Date:** 10/12/2015

File List

Name	File Size (bytes)	Datetime Created
SQR_WMUPR111_921606.log	1,887	07/14/2015 12:50:17.245077PM EDT
wmupr111_921606.PDF	1,982	07/14/2015 12:50:17.245077PM EDT
wmupr111_921606.out	1,053	07/14/2015 12:50:17.245077PM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	harveyp

Sample Semimonthly Leave Usage History Report

Report ID: WMUPR111

WESTERN MICHIGAN UNIVERSITY
SEMIMONTHLY LEAVE USAGE HISTORY REPORT

Page No. 1

Run Date 07/14/2015

Run Time 12:50:13

From 08-JUN-2015 through 14-JUN-2015

COMPANY	PAYGROUP	RUN ID	ORG CD	EMPLID	NAME	SICK BALANCE	SICK TAKEN	VACATION BALANCE	VACATION TAKEN	HOLIDAY TAKEN	FUNERAL TAKEN	NECESSITY TAKEN
WMU	SM1	SM1512	PAY		Bronco, Buster	22	0.000	11.89	0.000	0.000	0.000	0.000
ORG TOTAL							0.000		0.000	0.000	0.000	0.000
GRAND TOTAL							0.000		0.000	0.000	0.000	0.000

Employee Transactions and Totals

- **Displays pay code transaction data and totals by employee as well as a grand total**
- **Pay codes and their respective time totals are included in the display**

Click on the General tab, then reports. Click the + in front of All, then choose “Employee Transactions and Totals”.

The screenshot displays the Genie HR system interface. At the top, there is a navigation bar with tabs: **GENERAL**, **MY GENIES®**, **TIMEKEEPING**, and **SCHEDULING**. Below this is the **REPORTS** section, which includes a 'Last Refreshed: 8:34AM' status and filters for 'Show' (Previously Selected Employee(s)) and 'Time Period' (Previous Pay Period). The main area is divided into three tabs: **SELECT REPORT**, **SET OPTIONS**, and **CHECK RUN STATUS**. Under **SELECT REPORT**, there are buttons for 'Run Report', 'Refresh', and 'Print Screen'. A list of report categories is shown on the left, with 'All' expanded. A red arrow points to the 'Employee Transactions and Totals' report in this list. The right side of the screen shows the selected report's description: 'Displays pay code transaction data and total amount totals.'

GENERAL **MY GENIES®** **TIMEKEEPING** **SCHEDULING**

REPORTS
Last Refreshed: 8:34AM
Show: Previously Selected Employee(s) **Edit**
Time Period: Previous Pay Period

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Run Report **Refresh** **Print Screen**

Categories
[-] All
 Absent Employees
 Accrual Balances and Projections
 Accrual Detail
 Actual vs. Schedule by Job
 Actual vs. Schedule by Labor Account
 Comments
 Employee Hours by Job
 Employee Hours by Labor Account
 Employee Sign-off
 Employee Transactions and Totals
 Exceptions
 Holidays
 Hours by Job
 Hours by Labor Account
 Missing Employees
 Organizational Job Configuration
 Pay Codes
 Time Detail
 Timecard Sign-off, Request and Approval
[+] Accruals
[+] Configuration
[+] Detail Genie
[+] Roll-Up Genie
[+] Scheduler
[+] Timecard
[+] Working Time Directive

Employee Transactions and Totals

Description Displays pay code transaction data and total amount totals.

Click the “Set Options” tab:



REPORTS

Last Refreshed: 8:34AM

Show

Previously Selected Employee(s)

Edit

Time Period

Previous Pay Period

SELECT REPORT

SET OPTIONS

CHECK RUN STATUS

Run Report

Refresh

Print Screen ➡

Options

- Actual/Adjusted
- Pay Codes

Employee Transactions and Totals

Details

Click on Pay Codes:

REPORTS
Last Refreshed: 8:34AM

Show:
Time Period:

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Options
☐ Actual/Adjusted
☒ **Pay Codes**

Employee Transactions and Totals

Pay Codes

Available

Selected

E-mail / Schedule Format

Adobe Acrobat Document(.pdf)

This allows you to select what pay codes appear in your report. Most of the time you can skip this set up and run your report using all the pay codes.

If you would like to run reports using one or a few pay codes click Remove All:

REPORTS

Last Refreshed: 10:23AM

Show
Time Period

SELECT REPORT SET OPTIONS CHECK RUN STATUS

Options

☐ Actual/Adjusted

☒ Pay Codes

E-mail / Schedule Format

Adobe Acrobat Document(.pdf)

Employee Transactions and Totals

Pay Codes

Available

Regular
Overtime
Sick Usage - Hourly
Sick Usage - Salary
Vacation - Hourly
Vacation - Salary
2nd Shift
2nd Shift OT
3rd Shift
3rd Shift OT
Comment Only
Funeral Leave-Hourly
Funeral Leave-Salary
Holiday - Hourly
Holiday - Salary
Holiday Worked Regular
No Pay
Retro Hours

Selected

Click on the available pay codes you would like to run in the report (hold the control *Ctrl* button down to select more than one):

SELECT REPORT SET OPTIONS CHECK RUN STATUS

Run Report Refresh Print Screen →

Options
☐ Actual/Adjusted
☒ Pay Codes

Employee Transactions and Totals

Pay Codes

Available

- Regular
- Overtime
- Sick Usage - Hourly
- Sick Usage - Salary
- Vacation - Hourly
- Vacation - Salary
- 2nd Shift
- 2nd Shift OT
- 3rd Shift
- 3rd Shift OT
- Comment Only
- Funeral Leave-Hourly
- Funeral Leave-Salary
- Holiday - Hourly
- Holiday - Salary
- Holiday Worked Regular
- No Pay
- Retro Hours

Selected

Add>
Add All>>
<Remove
<<Remove All

E-mail / Schedule Format

Adobe Acrobat Document(.pdf)

Click Run Report

Once status is “complete” click on View Report

Click Add:

SELECT REPORT SET OPTIONS CHECK RUN STATUS

Run Report Refresh Print Screen ➔

Options

- Actual/Adjusted
- Pay Codes**

Employee Transactions and Totals

Pay Codes

Available

- Regular
- Overtime
- Sick Usage - Salary
- Vacation - Salary
- 2nd Shift
- 2nd Shift OT
- 3rd Shift
- 3rd Shift OT
- Comment Only
- Funeral Leave-Hourly
- Funeral Leave-Salary
- Holiday - Hourly
- Holiday - Salary
- Holiday Worked Regular
- No Pay
- Retro Hours
- Necessity Leave

Selected

- Sick Usage - Hourly
- Vacation - Hourly

Add>

Add All>>

<Remove

<<Remove All

E-mail / Schedule Format

Adobe Acrobat Document(.pdf) ▼

Employee Transaction Totals Sample

Employee Transactions & Totals

Time Period: Previous Pay Period
 Query: All Home
 Pay Codes: (2): [Sick Usage - Hourly|Vacation - Hourly]
 Actual/Adjusted: Show hours credited to this period only.

Data Up to Date: 11/11/2015 10:37 AM
 Executed on: 11/11/2015 10:37 AM
 Printed for: jrv2296

Employee:	*****			ID:	*****			
Transactions:	Day	Date	Pay Code	Hours	Money	Days	Entered By	Datasource
	Fri	10/30/2015	Vacation - Hourly	8.00	\$0.00		I4bettis	Timecard Editor
	Fri	11/6/2015	Vacation - Hourly	8.00	\$0.00		I4bettis	Timecard Editor
Totals:	Pay Code			Hours	Money	Days		
	Vacation - Hourly			16.00	\$0.00	0.00		
	Totals:			16.00	\$0.00	0.00		

Employee: *****				ID: *****				
Transactions:	Day	Date	Pay Code	Hours	Money	Days	Entered By	Datasource
	Mon	10/26/2015	Sick Usage - Hourly	1.50	\$0.00		I4bettis	Timecard Editor
	Mon	11/2/2015	Vacation - Hourly	8.00	\$0.00		I4bettis	Timecard Editor
	Tue	11/3/2015	Vacation - Hourly	8.00	\$0.00		I4bettis	Timecard Editor
Totals:	Pay Code			Hours	Money	Days		
	Sick Usage - Hourly			1.50	\$0.00	0.00		
	Vacation - Hourly			16.00	\$0.00	0.00		
	Totals:			17.50	\$0.00	0.00		

Employee:	*****				ID:	*****		
Transactions:	Day	Date	Pay Code	Hours	Money	Days	Entered By	Datasource
	Tue	10/27/2015	Sick Usage - Hourly	5.25	\$0.00		I4bettis	Timecard Editor
	Wed	10/28/2015	Sick Usage - Hourly	8.00	\$0.00		I4bettis	Timecard Editor
	Fri	10/30/2015	Vacation - Hourly	0.50	\$0.00		I4bettis	Timecard Editor
	Mon	11/2/2015	Sick Usage - Hourly	1.00	\$0.00		I4bettis	Timecard Editor

Time Detail

- **Displays detailed data about each employee's punches, duration, and pay code edits.**
- **Summary data is displayed per employee, totaling time by labor level and pay code, then by pay code only.**

Click on the General tab. Then click Reports. Click the + in front of All. Choose Time Detail. Once you choose Time Detail, set the show box to reflect “All Home and Transferred-In”. Choose the timeframe needed. Then click Set Options.

The screenshot shows the KRONOS web application interface. At the top is a navigation bar with tabs: GENERAL, MY GENIES®, TIMEKEEPING, SCHEDULING, and MY LINKS. Below this is a 'REPORTS' section with a 'Last Refreshed: 10:16AM' timestamp. A 'Show' dropdown is set to 'All Home and Transferred-in', and a 'Time Period' dropdown is set to 'Previous Pay Period'. Below these are three tabs: 'SELECT REPORT', 'SET OPTIONS', and 'CHECK RUN STATUS'. Under 'SELECT REPORT', there are buttons for 'Run Report', 'Refresh', and 'Print Screen'. A left-hand menu lists various report categories, with 'Time Detail' highlighted. A right-hand pane titled 'Time Detail' contains a 'Description' field stating: 'Displays detailed data about each employee's punches, duration, listing combined pay codes).'

1 points to the GENERAL tab in the top navigation bar.

2 points to the 'Time Detail' report category in the left-hand menu.

3 points to the 'Time Detail' report category in the left-hand menu.

4 points to the 'Show' dropdown menu.

5 – you can specify a date range; the previous pay or current pay period

6 points to the 'SET OPTIONS' tab.

Click 'Yes' to have each employee print on a separate page

REPORTS
Last Refreshed: 8:12AM

Show
Time Period

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Run Report **Refresh** **Schedule →** **E-mail →** **Send To Printer →** **Print Screen →**

Options
☐ Actual/Adjusted
☒ Employee Page Break

Time Detail

Employee Page Break

☐ No
☒ Yes

When the status is "complete" click on View Report.

Time Detail Report Sample

Time Detail						Data Up to Date: 11/11/2015 10:48:58 AM					
Time Period:		Previous Pay Period				Executed on:		11/11/2015 10:48:58 AM			
Query:		All Home				Printed for:		jrv2296			
Actual/Adjusted:		Show hours credited to this period only.				Insert Page Break After Each Employee:		Yes			
Employee:		ID:		Time Zone:		Eastern					
Status:		Active		Status Date: 6/18/2007		Pay Rule:		Regular 8 Hrs			
Primary Account		Start		End		Organization/zzEmployees/13877/None					
PAY/6411240/390389/1360/-/-/-		7/1/2015		Forever							
Date/Time	Apply To	In Punch	In Exc	Out Punch	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
Xfr/Move: Account		Comment		Xfr: Work Rule							
10/26/2015	12:00 AM	Regular					6.50				6.50
10/26/2015	12:00 AM	Sick Usage - Hourly					1.50				8.00
10/27/2015	12:00 AM	Overtime					1.40				9.40
10/27/2015	12:00 AM	Regular					8.00				17.40
10/28/2015	12:00 AM	Overtime					0.50				17.90
10/28/2015	12:00 AM	Regular					8.00				25.90
10/29/2015	12:00 AM	Overtime					1.50				27.40
10/29/2015	12:00 AM	Regular					8.00				35.40
10/30/2015	12:00 AM	Overtime					0.50				35.90
10/30/2015	12:00 AM	Regular					8.00				43.90
11/2/2015	12:00 AM	Vacation - Hourly					8.00				51.90
11/3/2015	12:00 AM	Vacation - Hourly					8.00				59.90
11/4/2015	12:00 AM	Regular					8.00				67.90
11/5/2015	12:00 AM	Overtime					0.40				68.30
11/5/2015	12:00 AM	Regular					8.00				76.30
11/6/2015	12:00 AM	Regular					8.00				84.30
Job Summary		Pay Code				Hours		Money		Days	
None		Organization/zzEmployees/13877									
		Overtime				4.30					
		Regular				62.50					
		Sick Usage - Hourly				1.50					
		Vacation - Hourly				16.00					
Totals:						84.30		\$0.00		0.00	
Labor Account Summary		Pay Code				Hours		Money		Days	
PAY/6411240/390389/1360/-/-/-											
		Overtime				4.30					
		Regular				62.50					
		Sick Usage - Hourly				1.50					
		Vacation - Hourly				16.00					
Pay Code Summary		Pay Code				Hours		Money		Days	
		Overtime				4.30					
		Regular				62.50					
		Sick Usage - Hourly				1.50					
		Vacation - Hourly				16.00					
Totals:						84.30		\$0.00		0.00	

****To run the report for an individual employee, first go into the employee's timecard and click on report. Click the + in front of All. Choose Time Detail. Enter the Time Period needed and click on Run Report. When the status is complete, click on View Report.**

Hours by Labor Account

- **Displays hours for each department (cost center) in which employees had hours**
- **The report totals hours for each labor account by pay code**

Click on the General tab, then reports. Click the + in front of All, then choose Hours by Labor Account.

KRONOS

GENERAL ▼ MY GENIES® ▼ TIMEKEEPING ▼ SCHEDULING ▼ MY LINKS ▼

REPORTS

Last Refreshed: 1:31PM

Show: All Home and Transferred-in Edit

Time Period: Previous Pay Period

SELECT REPORT SET OPTIONS CHECK RUN STATUS

Run Report Refresh Print Screen ➡

Categories

- ☒ All
 - Absent Employees
 - Accrual Balances and Projections
 - Accrual Detail
 - Actual vs. Schedule by Job
 - Actual vs. Schedule by Labor Account
 - Comments
 - Employee Hours by Job
 - Employee Hours by Labor Account
 - Employee Sign-off
 - Employee Transactions and Totals
 - Exceptions
 - Holidays
 - Hours by Job
 - Hours by Labor Account**
 - Missing Employees
 - Organizational Job Configuration
 - Pay Codes
 - Time Detail
 - Timecard Sign-off, Request and Approval
- ☒ Accruals
- ☒ Configuration
- ☒ Detail Genie
- ☒ Roll-Up Genie
- ☒ Scheduler
- ☒ Timecard
- ☒ Working Time Directive

Hours by Labor Account

Description Displays money/hours/wages for each labor account in which employee

Click on the Set Options tab:

REPORTS

Last Refreshed: 8:34AM

Show

Previously Selected Employee(s)

Edit

Time Period

Previous Pay Period

SELECT REPORT

SET OPTIONS

CHECK RUN STATUS

Run Report

Refresh

Print Screen →

Options

Actual/Adjusted
Pay Codes

Employee Transactions and Totals

Details

Then click on Pay Codes:

WESTERN MICHIGAN UNIVERSITY



This allows you to select what pay codes appear on your report. Most of the time you can skip this set up and run your report using all the pay codes

REPORTS
Last Refreshed: 8:34AM

Show:
Time Period:

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Options
☐ Actual/Adjusted
☒ Pay Codes

Employee Transactions and Totals

Pay Codes

Available

Selected

- Regular
- Overtime
- Sick Usage - Hourly
- Sick Usage - Salary
- Vacation - Hourly
- Vacation - Salary
- 2nd Shift
- 2nd Shift OT
- 3rd Shift
- 3rd Shift OT
- Comment Only
- Funeral Leave-Hourly
- Funeral Leave-Salary
- Holiday - Hourly
- Holiday - Salary
- Holiday Worked Regular
- No Pay
- Retro Hours

E-mail / Schedule Format

Adobe Acrobat Document(.pdf) ▼

If you would like to run reports using one or a few pay codes click Remove All

REPORTS

Last Refreshed: 10:23AM

Show
Time Period

SELECT REPORT

SET OPTIONS

CHECK RUN STATUS

Run Report

Refresh

Print Screen →

Options

☐ Actual/Adjusted

☒ Pay Codes

Employee Transactions and Totals

Pay Codes

Available

Regular

Overtime

Sick Usage - Hourly

Sick Usage - Salary

Vacation - Hourly

Vacation - Salary

2nd Shift

2nd Shift OT

3rd Shift

3rd Shift OT

Comment Only

Funeral Leave-Hourly

Funeral Leave-Salary

Holiday - Hourly

Holiday - Salary

Holiday Worked Regular

No Pay

Retro Hours

Add>

Add All>>

<Remove

<<Remove All

Selected

E-mail / Schedule Format

Adobe Acrobat Document(.pdf) ▼

To click on the available pay codes you would like to include in your report
(hold the control button *Ctrl* down to select more than one at a time).

SELECT REPORT SET OPTIONS CHECK RUN STATUS

Run Report Refresh Print Screen →

Options

- Actual/Adjusted
- Pay Codes**

Employee Transactions and Totals

Pay Codes

Available

- Regular
- Overtime
- Sick Usage - Hourly
- Sick Usage - Salary
- Vacation - Hourly
- Vacation - Salary
- 2nd Shift
- 2nd Shift OT
- 3rd Shift
- 3rd Shift OT
- Comment Only
- Funeral Leave-Hourly
- Funeral Leave-Salary
- Holiday - Hourly
- Holiday - Salary
- Holiday Worked Regular
- No Pay
- Retro Hours

Selected

Add>

Add All>

<Remove

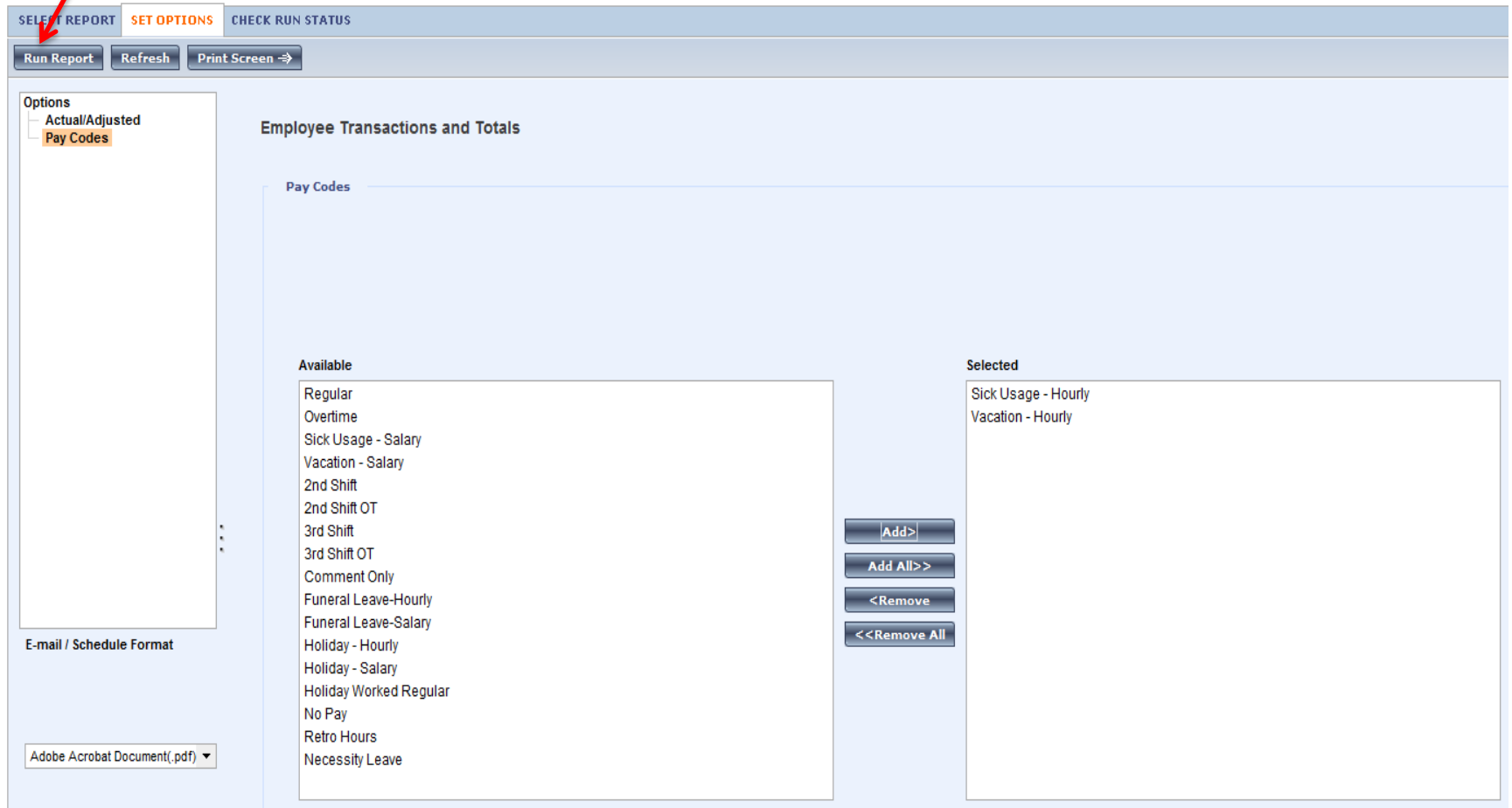
<<Remove All

E-mail / Schedule Format

Adobe Acrobat Document(.pdf) ▼

Click Add

Click Run Report. Once status is complete click on “View Report”.



The screenshot shows a web application interface for running reports. At the top, there are three tabs: 'SELECT REPORT', 'SET OPTIONS', and 'CHECK RUN STATUS'. Below these tabs are three buttons: 'Run Report', 'Refresh', and 'Print Screen'. A red arrow points to the 'Run Report' button. The main content area is titled 'Employee Transactions and Totals'. On the left, there is a sidebar with 'Options' including 'Actual/Adjusted' and 'Pay Codes'. The 'Pay Codes' section is active. Below the sidebar, there is a section for 'Available' pay codes and a 'Selected' section. The 'Available' list includes: Regular, Overtime, Sick Usage - Salary, Vacation - Salary, 2nd Shift, 2nd Shift OT, 3rd Shift, 3rd Shift OT, Comment Only, Funeral Leave-Hourly, Funeral Leave-Salary, Holiday - Hourly, Holiday - Salary, Holiday Worked Regular, No Pay, Retro Hours, and Necessity Leave. The 'Selected' list includes: Sick Usage - Hourly and Vacation - Hourly. Between the two lists are four buttons: 'Add>', 'Add All>>', '<Remove', and '<<Remove All'. At the bottom left, there is a label 'E-mail / Schedule Format' and a dropdown menu showing 'Adobe Acrobat Document(.pdf)'.

SELECT REPORT SET OPTIONS CHECK RUN STATUS

Run Report Refresh Print Screen →

Options
☐ Actual/Adjusted
☒ Pay Codes

Employee Transactions and Totals

Pay Codes

Available

- Regular
- Overtime
- Sick Usage - Salary
- Vacation - Salary
- 2nd Shift
- 2nd Shift OT
- 3rd Shift
- 3rd Shift OT
- Comment Only
- Funeral Leave-Hourly
- Funeral Leave-Salary
- Holiday - Hourly
- Holiday - Salary
- Holiday Worked Regular
- No Pay
- Retro Hours
- Necessity Leave

Selected

- Sick Usage - Hourly
- Vacation - Hourly

Add>
Add All>>
<Remove
<<Remove All

E-mail / Schedule Format

Adobe Acrobat Document(.pdf) ▼

Hours by Labor Account Sample

Hours by Labor Account

Data Up to Date: 11/11/2015 12:56:58 PM
 Executed on: 11/11/2015 12:56:57 PM
 Printed for: jrv2296

Time Period: Previous Pay Period
 Query: All Home and Transferred-in
 Pay Codes: (19): [Regular]Overtime[Sick Usage - Hourly][Sick Usage - Salary][Vacation - Hourly][Vacation - Salary][2nd Shift]...
 Actual/Adjusted: Show hours credited to this period only.

	Money	Hours	Days
PAY/0019780/390389/1655/-/-/-			
Regular	\$0.00	41.00	0.00
Totals:	\$0.00	41.00	0.00
PAY/6411240/390389/1088/-/-/-			
Overtime	\$0.00	0.50	0.00
Regular	\$0.00	64.75	0.00
Sick Usage - Hourly	\$0.00	14.25	0.00
Vacation - Hourly	\$0.00	1.00	0.00
Totals:	\$0.00	80.50	0.00
PAY/6411240/390389/1360/-/-/-			
Overtime	\$0.00	4.30	0.00
Regular	\$0.00	190.50	0.00
Sick Usage - Hourly	\$0.00	1.50	0.00
Vacation - Hourly	\$0.00	48.00	0.00
Totals:	\$0.00	244.30	0.00
Totals for PAY:	\$0.00	365.80	0.00
Grand Totals:	\$0.00	365.80	0.00
Pay Code Summary	Money	Hours	Days
Overtime	\$0.00	4.80	0.00
Regular	\$0.00	296.25	0.00
Sick Usage - Hourly	\$0.00	15.75	0.00
Vacation - Hourly	\$0.00	49.00	0.00
Grand Totals:	\$0.00	365.80	0.00

Timecard Sign-Off, Request and Approval

- **Displays audit information related to Timecard Approvals and Sign-Off**
- **The information includes the date and time, along with the user who performed the action**

Click on the General tab, then reports. Click the + in front of All, then choose Timecard Sign-Off, Request and Approval

The screenshot displays the KRONOS software interface. At the top, there is a navigation bar with four tabs: 'GENERAL', 'MY GENIES®', 'TIMEKEEPING', and 'SCHEDULING'. Below this, the 'REPORTS' section is visible, showing 'Last Refreshed: 2:55PM' and two dropdown menus for 'Show' (set to 'All Home and Transferred-in') and 'Time Period' (set to 'Previous Pay Period'). Below the dropdowns are three buttons: 'Run Report', 'Refresh', and 'Print Screen'. The 'SELECT REPORT' tab is active, showing a list of categories. The 'All' category is expanded, revealing a list of reports. The 'Timecard Sign-off, Request and Approval' report is highlighted. To the right of the list, a description for the selected report is shown: 'Description: Displays audit information related to Timecard frame. The information includes the date and'.

KRONOS

GENERAL **MY GENIES®** **TIMEKEEPING** **SCHEDULING**

REPORTS
Last Refreshed: 2:55PM

Show: All Home and Transferred-in **Edit**

Time Period: Previous Pay Period

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Run Report **Refresh** **Print Screen**

Categories

- ☒ **All**
 - Absent Employees
 - Accrual Balances and Projections
 - Accrual Detail
 - Actual vs. Schedule by Job
 - Actual vs. Schedule by Labor Account
 - Comments
 - Employee Hours by Job
 - Employee Hours by Labor Account
 - Employee Sign-off
 - Employee Transactions and Totals
 - Exceptions
 - Holidays
 - Hours by Job
 - Hours by Labor Account
 - Missing Employees
 - Organizational Job Configuration
 - Pay Codes
 - Time Detail
 - Timecard Sign-off, Request and Approval**
- ☒ **Accruals**
- ☒ **Configuration**
- ☒ **Detail Genie**
- ☒ **Roll-Up Genie**
- ☒ **Scheduler**
- ☒ **Timecard**
- ☒ **Working Time Directive**

Timecard Sign-off, Request and Approval

Description Displays audit information related to Timecard frame. The information includes the date and

Once you choose the report Timecard Sign-Off, Request and Approval, set the 'Show' box to reflect "All Home and Transferred-In". Choose the Time Period needed.

Click run report. You will be flipped into the Check Run Status.

REPORTS
Last Refreshed: 3:07PM

Show

Time Period

SELECT REPORT **SET OPTIONS** **CHECK RUN STATUS**

Report Name	Format	Date In	Date Done	Status	
Timecard Sign-off, Request and Approval	pdf	Wed 11/11/2015 03:07:07PM		Waiting	Screen
Timecard Sign-off, Request and Approval	pdf	Wed 11/11/2015 02:28:06PM	Wed 11/11/2015 02:28:16PM	Complete	Screen

Once the status is Complete, click on View Report:

Timecard Signoff, Request and Approval Audit Trail

Executed on: 11/11/2015 3:07:10 PM
Printed for: jrv2296

Time Period: Previous Pay Period
Query: All Home and Transferred-in
Database Time Zone: (GMT -05:00) Eastern Time (Applies to data in Edit Date/Time column)

Action Taken	Effective Date	Start Time	Amount	Edit Date/Time	User	Server	Client	Data Source
Reason		Comments						
Name:		ID:						
Approval by				11/9/2015 10:41 AM	harveyp	kwcp1.cc.wmich.edu	141.218.176.252	Group Editor
Sign Off	11/8/2015			11/9/2015 10:46 AM	harveyp	kwcp1.cc.wmich.edu	141.218.176.252	Group Editor
Name:		ID:						
Approval by Manager	11/8/2015			11/9/2015 8:33 AM	l4bettis	kwcp1.cc.wmich.edu	141.218.179.187	Group Editor
Approval by Manager	11/8/2015			11/9/2015 10:40 AM	harveyp	kwcp1.cc.wmich.edu	141.218.176.252	Group Editor
Sign Off	11/8/2015			11/9/2015 10:46 AM	harveyp	kwcp1.cc.wmich.edu	141.218.176.252	Group Editor
Name:		ID:						
Approval by Manager	11/8/2015			11/9/2015 8:33 AM	l4bettis	kwcp1.cc.wmich.edu	141.218.179.187	Group Editor
Approval by Manager	11/8/2015			11/9/2015 10:40 AM	harveyp	kwcp1.cc.wmich.edu	141.218.176.252	Group Editor
Sign Off	11/8/2015			11/9/2015 10:46 AM	harveyp	kwcp1.cc.wmich.edu	141.218.176.252	Group Editor
Name:		ID:						
Approval by Manager	11/8/2015			11/9/2015 8:33 AM	l4bettis	kwcp1.cc.wmich.edu	141.218.179.187	Group Editor
Approval by Manager	11/8/2015			11/9/2015 10:38 AM	harveyp	kwcp1.cc.wmich.edu	141.218.176.252	Group Editor
Sign Off	11/8/2015			11/9/2015 10:45 AM	harveyp	kwcp1.cc.wmich.edu	141.218.176.252	Group Editor
Name:		ID:						
Approval by Manager	11/8/2015			11/9/2015 8:33 AM	l4bettis	kwcp1.cc.wmich.edu	141.218.179.187	Group Editor



****To run the report for one individual employee, first go into the employee's timecard, then choose Reports.**

Timecard | **Schedule** | People | Reports

TIMECARD

Loaded: 3:27PM

Name & ID

Time Period

Save | Actions ▾ | Punch ▾ | Amount ▾ | Accruals ▾ | Comment ▾ | Reports ▾

		Date	Pay Code	Amount	In
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mon 11/09	▼		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tue 11/10	▼		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Wed 11/11	▼		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Thu 11/12	▼		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fri 11/13	▼		

Click the + in front of All. Choose Timecard Sign-Off, Request and Approval. Enter the Time Period needed and click on Run Report. When the status says complete, click on View Report.

PeopleSoft TimeKeepers Report – Active Student and Temp Data

Human Resources

11/12/2015

Active Student & Temp Data

wmhr5011-16

Name	Emplid	Job#	Effective Dt	Job Ind	Kronos Job Ind	WIN	Jobcode	Title	Grade	Step	Comp rate	Annual Base Pay	Acct Cd	FICA Status	Work Study	Termination Dt
Bronco, Buster	xxxxxx	0	8/17/2015	P	P	xxxxxxxxxx	060047	Stu-Fire Extinguisher Asst	A	1	8.15	0.01	XX-XXXXXXXX-XXXX	Exempt	N	12/21/2015
Jerry, Tommin	xxxxxx	0	8/17/2015	S	P	xxxxxxxxxx	060096	Stu-Office Asst	D	3	9.49	0.01	XX-XXXXXXXX-XXXX	Exempt	Y	
Student, Awesome	xxxxxx	0	8/17/2015	S	P	xxxxxxxxxx	060096	Stu-Office Asst	B	1	8.43	0.01	XX-XXXXXXXX-XXXX	Non Exempt	Y	5/1/2016
Ment, Cee	xxxxxx	0	8/17/2015	P	S	xxxxxxxxxx	060067	Stu-Internship	Q	0	11.00	0.01	XX-XXXXXXXX-XXXX	Exempt	N	7/15/2016
Days, Happy	xxxxxx	0	8/17/2015	P	P	xxxxxxxxxx	060096	Stu-Office Asst	B	1	8.43	0.01	XX-XXXXXXXX-XXXX	Exempt	Y	
DaClass, Toppof	xxxxxx	0	8/17/2015	S	S	xxxxxxxxxx	060067	Stu-Internship	Q	0	10.00	0.01	XX-XXXXXXXX-XXXX	Non Exempt	Y	

Excel Tips & Tricks

- Filtering
- Pivot Tables
- Other

Questions?

Thank You!