PSHR WMU Electronic Workflow
~ Reports User Guide

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Western Michigan University
Human Resources
1300 Seibert Administration Building
387-3620
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Requesting User Access

To process a PSHR WMU Electronic Workflow Report you must have online security access to the PeopleSoft WMU Workflow panels.

ALL initiators and approvers have access to run the Approval Rules Report. Only those users identified by their departments as requiring access to the remaining reports have been granted access.

If you are unable to access the reports, or if you have questions regarding user access, please contact Mary Jo Ward at maryjo.ward@wmich.edu or 387-3658.

Web Browser Requirements

The PSHR WMU Electronic Workflow works best with Internet Explorer version 7.0. If you are using a Mac, the Firefox browser seems to work best.

Accessing the WMU Electronic Workflow Form Panels

1) Go to the Web site address provided to you when your online security access was authorized.
2) Enter your assigned UserID and password.
3) ‘Click’ the ‘Sign In’ button.
Approval Rules Report

The approval rules report allows users to view the existing electronic workflow approval rules (process) for their area.

1) Log into PeopleSoft

   a) See *Accessing the WMU Electronic Workflow Form Panels*.

2) Access the WMU Electronic Workflow Reports

   a) ‘Click’ on WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU – Workflow Approval Rules under WMU Workflow Reports.

Note: If this is your first time running this report, you will need to add a run control.

   a) Select the “Add a New Value” tab.
   b) Enter your assigned User ID in the Run Control ID box.
   c) ‘Click’ Add to continue.
3) Running the Approval Rules Report

   a) Select the “Find an Existing Value” tab.
   b) ‘Click’ Search to continue.
   c) Enter the WMU Form Type.
      i. ‘Click’ on the looking glass icon to search and select valid WMU Form Type.
   d) Select the radio button in the Group Box for the group you want to see approval rules for.
      • Cost Center = Reports approval rules for that cost center. The cost center is also known as the department section of the combo code.
      • Department = Human Resources’ department label.
      • College/Division = Reports approval rules for that level and lower.
      • VP Area = Reports approval rules for that level and lower.
      • All VP Areas = Reports approval rules for the entire campus.

   Note: ‘Click’ on the looking glass icon for a list of cost center, department, and college/division descriptions.

   Note: If you select a specific area and no approval rules are found for that level, the program will report the default approval rules that will be used.

   e) ‘Click’ Run at the top right hand of the screen to continue.
f) Verify values on the Process Scheduler Request page:
   i. Server Name: PSUNX.
   ii. Under the Process List, ‘Check’ the box with the description of Approval Rules Report; Process Name WMUHR504.
   iii. Output Type: Web.
   iv. Format Type: PDF.

g) ‘Click’ OK.
h) ‘Click’ Report Manager link at the top right hand of page to view report.
i) Select the Administration tab.

j) ‘Click’ the Details link on the right for the report that was just completed.

Note: When the report is complete, a status of “Posted” will be displayed. You may need to wait a few seconds for processing. Click the Refresh button if needed.
k) ‘Click’ the link under the File List labeled as a .pdf to open the report.

i. You may save or print the report using the File, Save As or Print menu options. You may also save the report by clicking the disk at the top left side of the screen.
## Sample Approval Rules Report

### Date:
- 20-02-2013

### Report Details:
- **Department:** HCM
- **Module:** Approval Rules

### Approval Steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Process</th>
<th>Action</th>
<th>Account</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Process 1</td>
<td>Submit</td>
<td>00015450</td>
<td>John Doe</td>
</tr>
<tr>
<td>2</td>
<td>Process 2</td>
<td>Approve</td>
<td>00015451</td>
<td>Jane Smith</td>
</tr>
<tr>
<td>3</td>
<td>Process 3</td>
<td>Reject</td>
<td>00015452</td>
<td>Mary Johnson</td>
</tr>
</tbody>
</table>

### Process Notes:

- **Note:** All approval decisions are final and cannot be reversed.
- **Confidential Information:** Access granted to authorized personnel only.

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**Report Footer:**

- **Revised:** 01.08.09
- **Author:** John Doe
- **Page:** 8

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**Images:**
- A screenshot of the workflow approval rules interface is included, showing the process steps and notes.
- A table summarizing the approval details is also visible.

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**Additional Information:**
- The report provides a detailed overview of the approval process, highlighting key steps and responsible parties.
- It includes a section for confidential information, indicating restricted access to certain data.
Temporary Appointment Spreadsheet Report

The temporary appointment spreadsheet report generates a spreadsheet listing all temporary appointments processed.

1) Log into PeopleSoft

   a) See Accessing the WMU Electronic Workflow Form Panels.

2) Access the WMU Electronic Workflow Reports

   a) ‘Click’ on WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU – Workflow Reports.

Note: If this is your first time running this report, you will need to add a run control.

   a) Select the “Add a New Value” tab.
   b) Enter your assigned User ID in the Run Control ID box.
   c) Enter WMUHR503 in the Object Name box.
   d) ‘Click’ Add to continue.
3) Running the Temporary Appointment Spreadsheet Report

a) Select the “Find an Existing Value” tab.
b) ‘Click’ Search to select an existing run control with the Object Name WMUHR503.
c) ‘Click’ Run at the top right hand corner to proceed to the Process Scheduler Request Page.

Note: Leaving the parameters as displayed will return all Temporary Appointments that you have been granted access to view. You may specify a date range if needed.
d) Verify values on the Process Scheduler Request page:
   i. **Server Name**: PSUNX.
   ii. **Under the Process List**, ‘Check’ the box with the description of Extract TA Records to CSV file; **Process Name** WMUHR503.
   iii. **Output Type**: Web.
   iv. **Format Type**: PDF.

e) ‘Click’ OK.
f) ‘Click’ Report Manager link at the top right hand of page to view report.
g) Select the Administration tab.
h) ‘Click’ the Details link on the right for the report that was just completed.

Note: When the report is complete, a status of “Posted” will be displayed. You may need to wait a few seconds for processing. Click the Refresh button if needed.
i) ‘Click’ the link under the File List labeled as a .csv to open the report.

j) ‘Click’ Open from the pop up window. The data will display in a spreadsheet.
Incidental Pay Spreadsheet Report

The incidental pay spreadsheet report generates a spreadsheet listing all incidental pay forms processed.

1) Log into PeopleSoft
   a) See *Accessing the WMU Electronic Workflow Form Panels*.

2) Access the WMU Electronic Workflow Reports
   a) ‘Click’ on WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU – Workflow Reports.

Note: If this is your first time running this report, you will need to add a run control.
   a) Select the “Add a New Value” tab.
   b) Enter your assigned User ID in the Run Control ID box.
   c) Enter WMUHR502 in the Object Name box.
   d) ‘Click’ Add to continue.
3) Running the Temporary Incidental Pay Spreadsheet Report

   a) Select the “Find an Existing Value” tab.
   b) ‘Click’ Search to select an existing run control with the Object Name WMUHR502.
c) ‘Click’ Run at the top right hand corner to proceed to the Process Scheduler Request Page.

Note: Leaving the parameters as displayed will return all Incidental Pay forms that you have been granted access to view. You may specify a date range if needed.
d) Verify values on the Process Scheduler Request page:
   i. **Server Name**: PSUNX.
   ii. **Under the Process List**, ‘Check’ the box with the description of Extract IP Records to CSV file; **Process Name** WMUHR502.
   iii. **Output Type**: Web.
   iv. **Format Type**: PDF.

e) ‘Click’ OK.
f) ‘Click’ Report Manager link at the top right hand of page to view report.
g) Select the Administration tab.

h) ‘Click’ the Details link on the right for the report that was just completed.

Note: When the report is complete, a status of “Posted” will be displayed. You may need to wait a few seconds for processing. Click the Refresh button if needed.
i) ‘Click’ the link under the File List labeled as a .csv to open the report.

j) ‘Click’ Open from the pop up window. The data will display in a spreadsheet.
**Temporary Appointment Detail Report by Form Number**

The temporary appointment detail report by form number will report data for a specific form number.

1) Log into PeopleSoft
   
   a) See *Accessing the WMU Electronic Workflow Form Panels*.

2) Access the WMU Electronic Workflow Reports
   
   a) ‘Click’ on WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU – Workflow Reports.

*Note:* If this is your first time running this report, you will need to add a run control.

   a) Select the “Add a New Value” tab.
   b) Enter your assigned User ID in the Run Control ID box.
   c) Enter WMUHR506 in the Object Name box.
   d) ‘Click’ Add to continue.

![PeopleSoft Interface Elements](image-url)
3) Running the Temporary Appointment Detail Report by Form Number

a) Select the “Find an Existing Value” tab.
b) ‘Click’ Search to select an existing run control with the Object Name WMUHR506.
c) Enter the Temporary Appointment form number for the form you want to print.
   i. ‘Click the + to enter additional form numbers.

d) ‘Click’ Run at the top right hand corner to proceed to the Process Scheduler Request Page.

Note: You must know the form number for the form you want to print in order to run the report.
e) Verify values on the Process Scheduler Request page:
   i. Server Name: PSUNX.
   ii. Under the Process List, ‘Check’ the box with the description of Print Temp Appointment Forms; Process Name WMUHR506.
   iii. Output Type: Web.
   iv. Format Type: PDF.

f) ‘Click’ OK.
g) ‘Click’ Report Manager link at the top right hand of page to view report.
h) Select the Administration tab.
i) ‘Click’ the Details link on the right for the report that was just completed.

Note: When the report is complete, a status of “Posted” will be displayed. You may need to wait a few seconds for processing. Click the Refresh button if needed.
j) ‘Click’ the link under the File List labeled as a .pdf to open the report.
   i. You may save or print the report using the File, Save As or Print menu options. You may also save the report by clicking the disk at the top left side of the screen.
**Sample Temporary Appointment Detail Report by Form Number**

<table>
<thead>
<tr>
<th>Reference</th>
<th>Form Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>002</td>
<td></td>
<td></td>
</tr>
<tr>
<td>003</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Temporary Appointment Form Details**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temp App Form #</td>
<td>1234</td>
</tr>
<tr>
<td>Requested Date</td>
<td>01/01/2023</td>
</tr>
<tr>
<td>Approved Date</td>
<td>01/02/2023</td>
</tr>
<tr>
<td>Approval Remarks</td>
<td>Approved</td>
</tr>
<tr>
<td>Assigned To</td>
<td>John Smith</td>
</tr>
<tr>
<td>Assigned Date</td>
<td>01/03/2023</td>
</tr>
<tr>
<td>Assigned Remarks</td>
<td>Assigned</td>
</tr>
<tr>
<td>Requested By</td>
<td>Jane Doe</td>
</tr>
<tr>
<td>Request Date</td>
<td>01/04/2023</td>
</tr>
<tr>
<td>Request Remarks</td>
<td>Requested</td>
</tr>
<tr>
<td>Original Approval Date</td>
<td>01/05/2023</td>
</tr>
<tr>
<td>Original Approval Remarks</td>
<td>Approved</td>
</tr>
</tbody>
</table>

**Temporary Appointment History**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/06/2023</td>
<td>Approved</td>
</tr>
<tr>
<td>01/07/2023</td>
<td>Cancelled</td>
</tr>
<tr>
<td>01/08/2023</td>
<td>Rescheduled</td>
</tr>
</tbody>
</table>

**Temporary Appointment Comments**

- User comments and notes.
**Incidental Pay Detail Report by Form Number**

The incidental pay detail report by form number will report data for a specific form number.

1) **Log into PeopleSoft**
   a) See *Accessing the WMU Electronic Workflow Form Panels*.

2) **Access the WMU Electronic Workflow Reports**
   a) ‘Click’ on WMU Workflow under Menu on the left hand side of screen.
   b) ‘Click’ on WMU – Workflow Reports.

**Note:** If this is your first time running this report, you will need to add a run control.

   a) Select the “Add a New Value” tab.
   b) Enter your assigned User ID in the Run Control ID box.
   c) Enter WMUHR501 in the Object Name box.
   d) ‘Click’ Add to continue.
3) Running the Incidental Pay Detail Report by Form Number
   a) Select the “Find an Existing Value” tab.
   b) ‘Click’ Search to select an existing run control with the Object Name WMUHR501.
c) Enter the Incidental Pay form number for the form you want to print.
i. *Click the + to enter additional form numbers.*
d) ‘Click’ Run at the top right hand corner to proceed to the Process Scheduler Request Page.

Note: You must know the form number for the form you want to print in order to run the report.
e) Verify values on the Process Scheduler Request page:
   v. Server Name: PSUNX.
   vi. Under the Process List, ‘Check’ the box with the description of Print Incidental Pay Forms; Process Name WMUHR501.
   viii. Format Type: PDF.

f) ‘Click’ OK.
g) ‘Click’ Report Manager link at the top right hand of page to view report.
h) Select the Administration tab.
i) ‘Click’ the Details link on the right for the report that was just completed.

Note: When the report is complete, a status of “Posted” will be displayed. You may need to wait a few seconds for processing. Click the Refresh button if needed.
j) ‘Click’ the link under the File List labeled as a .pdf to open the report.
   i. You may save or print the report using the File, Save As or Print menu options. You may also save the report by clicking the disk at the top left side of the screen.
Sample Incidental Pay Detail Report by Form Number