Management Data Report (wmhr5011-24),
Overview & Running Instructions

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

- Breadth of data access depends on the PeopleSoft security profile of the person running the report.

- Active jobs include those of faculty, staff, part-time instructors, adjuncts, temporary staff, graduate assistants, and student employees. Because active jobs include both primary and secondary job(s), an employee may be listed more than once in the report.

- Data presented are the most current with respect to the As Of Date used to run the report.

- The report will take 5 minutes to 2.5 hours to run depending on the size of the department, college or executive area selecting from. You do not have to be logged into PeopleSoft while the program is running.

- Unauthorized use of data may subject the employee to disciplinary action up to and including termination of employment.

- Please report data issues or data you feel you are not authorized to receive to todd.mossman@wmich.edu or call 387-3694.

A data dictionary for this report is provided at http://www.wmich.edu/hr/reporting.html To insure the data are properly interpreted and used, please familiarize yourself with the dictionary content.

The following pages contain instructions for running the Management Data Report.
Login Instructions

You login to the PeopleSoft Human Resources application through the GoWMU portal using your Bronco NetID and password.

Access the portal using the following link: gowmu.wmich.edu ([http://gowmu.wmich.edu/](http://gowmu.wmich.edu/)). Once logged into GoWMU you will find the PeopleSoft Human Resources Login link in the My Work channel of the Faculty/Staff Home tab under PeopleSoft Administrative Applications.

If you need assistance with GoWMU or help with your Bronco NetID and password, please contact the OIT Help Desk at 387-4357 or helpdesk@wmich.edu
Instructions for the above page:

- From the Menu list on the left hand side click on <Reporting Tools>
Instructions for the above page:

- From the Menu list on the left hand side or the center of the page click on <WMU Reporting>
Instructions for the above page:

- From the Menu list on the left hand side or the center of the page click on <WMU – HR Reporting>
Instructions for the above page:

- **First Time Only setup:**
  Click <Add New Value> tab then enter "wmhr5011-24" *(Note: not wmyhr..., characters in lower case)* then click <Add>

- **Normal access after setup has been done:** enter "wmhr5011-24"
Instructions for the above page:

- Enter an "As of Date" – can be future or past date
- Click <Run> in the upper right corner.
Instructions for the above page:

- Click on the <box> next to the Description “WMHR5011-Point in time Jobdata”. Then scroll to the bottom and click the <OK> button.
Instructions for the above page:

- Click on the `<Process Monitor>` link to view the program running and view the spreadsheet.
Instructions for the above page:

- Here is where you view the program status and get to the spreadsheet. While the program is running, the Run Status may be either Queued or Processing. Once complete the Run Status will be Success.

- The <yellow Refresh button> must periodically (every 5 minutes or so) be clicked to update the Run Status. You can do other things while waiting for the program to complete.

- Once the Run Status is “Success” and Distribution Status is “Posted” (may take 5 to 15 minutes to get to this point depending on size of department(s)) Click the <Details> link.

- You will probably want to set the <Last: box> (upper right side) to “60” Days and click <Save> to keep this setting. This will allow you to see 60 days of your runs. The system keeps 60 days’ worth.
Instructions for the above page:

- Click the <View Log/Trace> link (lower right side)
- **Instructions for the above page:**

- **If you are using Excel 2007:**
  Single click on the `<.csv file>` and it will automatically open. Format the spreadsheet and save it to your PC or LAN or just leave it in PeopleSoft and bring it up as needed. It will remain in PeopleSoft for up to 60 days. See page 9 above for settings.

- **If you are using Excel 97-2003:**
  Right click on the `.csv` and click the Save link As option:
  for Save as Type – use All Files;
  for Save in – select a folder to save it in (c:\temp is convenient but it can be anywhere on your PC or Network)
  - Navigate to the folder you saved it in and double click on the file – it will open in Excel
  
  OR – for some, the above may not work ...

  - Single click on the `.csv` which brings it up in Excel as a `.csv`
  - Do File – Save As and Enter a name and file type of `.xls Excel Workbook`
**Tips for Excel 2007:**

To fit the column widths – highlight entire sheet (click box above 1) => click Home tab => click Format => click Autofit Column Width

To keep heading row at top - highlight entire sheet (click box above 1) => click View tab => click Freeze Panes => click Freeze Top Row

To save the spreadsheet – click Office Button in upper left corner => click Save As => click Excel Workbook => for Save In: - navigate to appropriate folder => click Save

To hide or delete columns – right click on the alpha column header to highlight the column then click <Hide> or <Delete>. Multiple columns can be done at the same time by highlighting several columns at once then right clicking and <Hide> or <Delete>

To move columns – right click on the alpha column header to highlight the column then click <Cut> then right click on the alpha column header you want to move the columns before and click <Insert cut cells>.