

PSHR Reports Running the Management Data Report wmhr5011-24

9.2 PeopleSoft

This guide provides instructions on how to run the Management Data Report in PeopleSoft for a list of all employees in a department.

October 2017

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Use the Overview and detailed run instructions to get started.

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Once you are familiar with the process, try the quick click instructions for running the report.

Requesting User Access

To run a program you must have online security access to the PeopleSoft Reporting. Users who do not have the following reports can obtain them with supervisor's approval using the PeopleSoft information access authorization form found on Human Resources website under Forms:

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

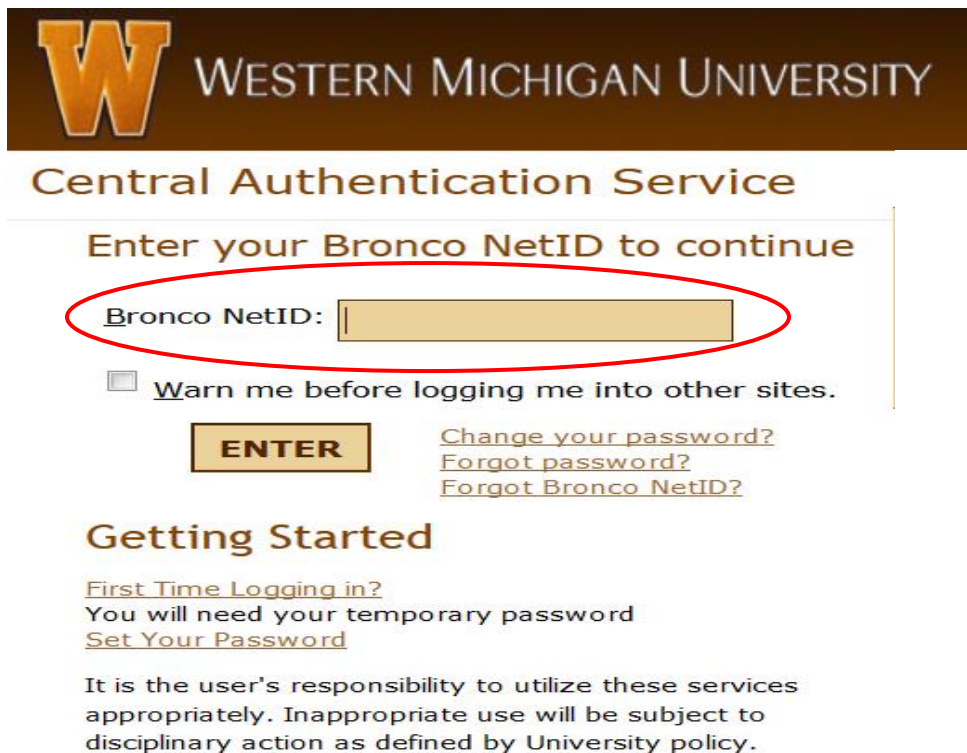
If you are unable to access the reports, or if you have questions regarding user access, please contact Human Resources at hr-hris@wmich.edu or (269) 387-3620. If questions or issues with the browser, contact the OIT Help Desk at 387-HELP.

Web Browser Requirements

PeopleSoft works best with Internet Explorer version 11. If you are using a Mac, the Safari browser works best but may work with Chrome.

Accessing the Reporting Panels

- 1) Log in through the GoWMU portal at <https://gowmu.wmich.edu/cp/home/displaylogin>
- 2) Enter your assigned User ID
- 3) 'Click' the 'Enter' button and then enter (your Bronco NetID) and password at the prompt.



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Central Authentication Service

Enter your Bronco NetID to continue

Bronco NetID:

Warn me before logging me into other sites.

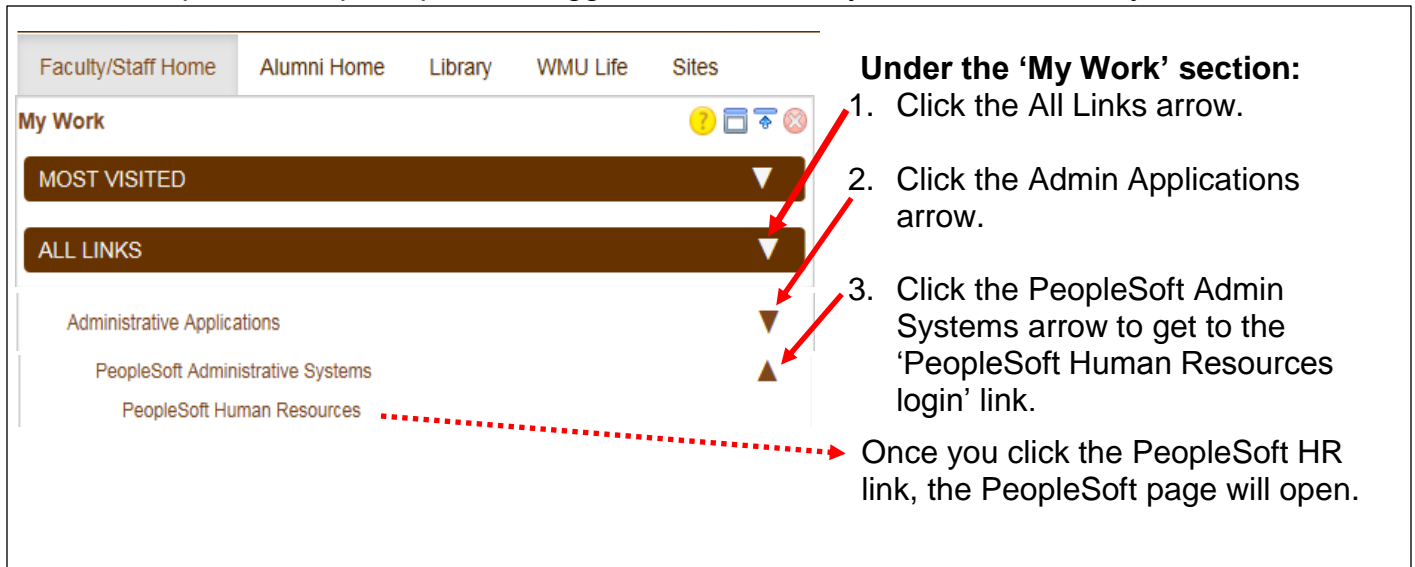
ENTER [Change your password?](#)
[Forgot password?](#)
[Forgot Bronco NetID?](#)

Getting Started

[First Time Logging in?](#)
You will need your temporary password
[Set Your Password](#)

It is the user's responsibility to utilize these services appropriately. Inappropriate use will be subject to disciplinary action as defined by University policy.

4) The GoWMU panel will open up. Once logged into GoWMU, you'll see the Faculty/Staff Home Tab.



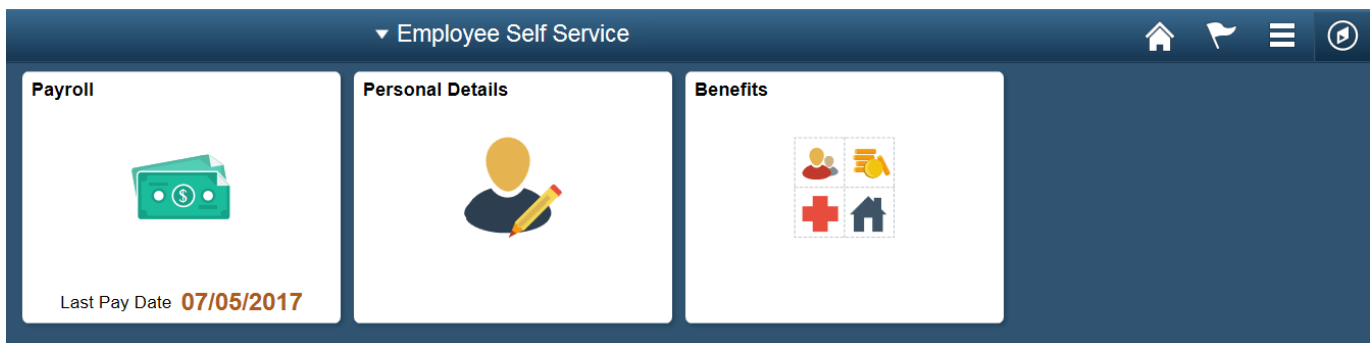
The screenshot shows the GoWMU Faculty/Staff Home page. At the top, there are navigation tabs: Faculty/Staff Home, Alumni Home, Library, WMU Life, and Sites. Below the tabs is a 'My Work' section with a yellow help icon, a blue window icon, and a red close icon. Under 'My Work', there are two expandable sections: 'MOST VISITED' and 'ALL LINKS'. Below these are 'Administrative Applications', 'PeopleSoft Administrative Systems', and 'PeopleSoft Human Resources'. Red arrows point from the instructions to the 'ALL LINKS' arrow, the 'Admin Applications' arrow, and the 'PeopleSoft Human Resources' link. A red dotted arrow points from the 'PeopleSoft Human Resources' link to the text below.





Under the 'My Work' section:

1. Click the All Links arrow.
2. Click the Admin Applications arrow.
3. Click the PeopleSoft Admin Systems arrow to get to the 'PeopleSoft Human Resources login' link.

Once you click the PeopleSoft HR link, the PeopleSoft page will open.

5) The PeopleSoft page will open to the PeopleSoft Main Home Page

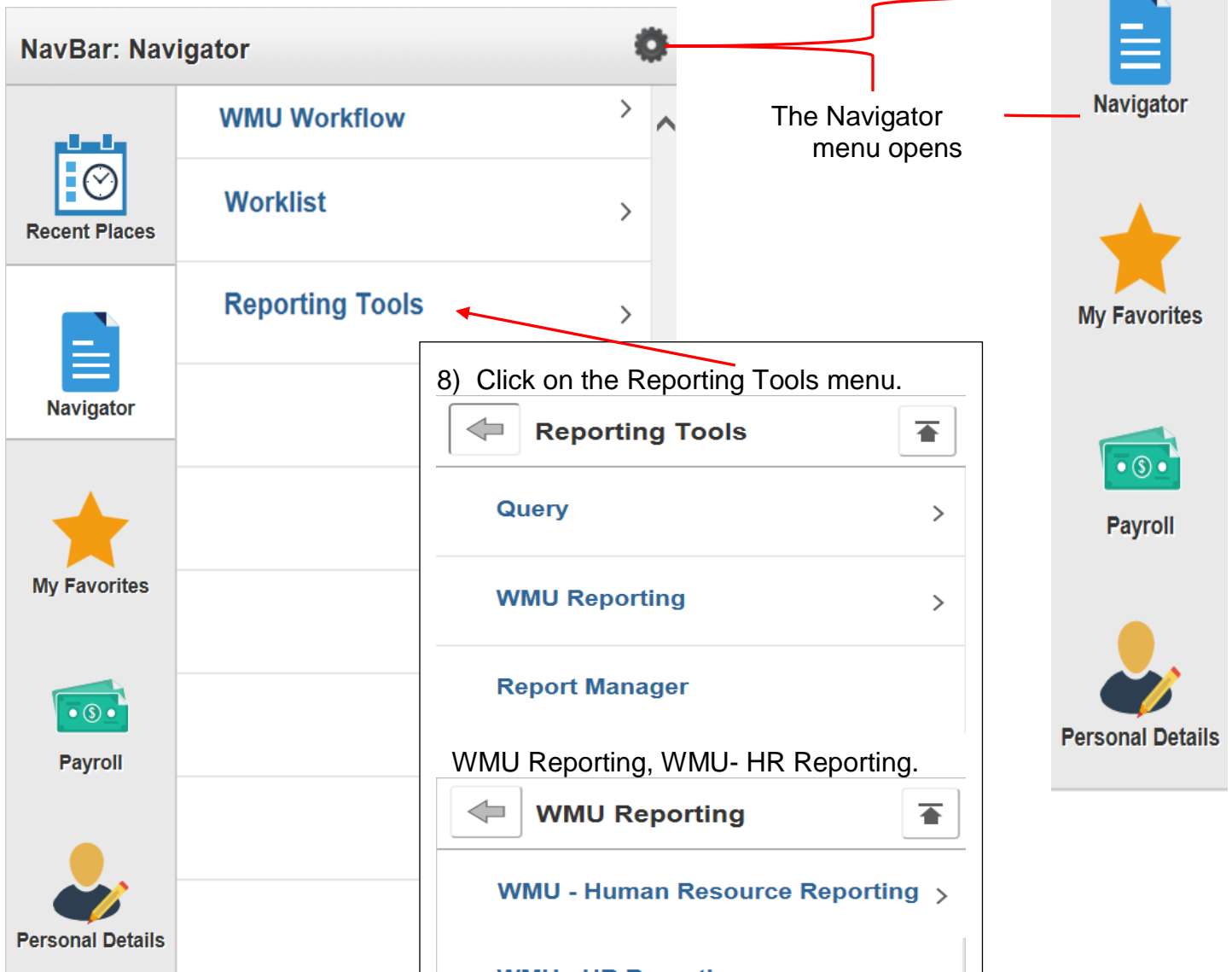


-  - Home – Click on this icon to return to the Main PeopleSoft Home page
-  - Notifications – Click on this icon to view actions and alerts
-  - Actions List – Click on this icon to save favorites and Sign Out
-  - Nav Bar – Click on this icon to navigate to certain menu items (formerly the Main Menu). It contains Recent Places, My Favorites, Payroll, Personal Details and Benefits.

6) Clicking the Nav Bar icon will display the drop down main menu listings:



7) Click on the Navigator icon to get to Reporting Tools.




Running the Program

HR has created a unique Run Control ID that can be ran on demand per the department's needs. Each program has a different Run Control ID (which is also the designated report number) associated with it. Use the Run Control ID/report number for the **Management Data Report (wmhr5011-24)** when following these instructions.

A) Log into PeopleSoft

- a) See **Accessing the Reporting Panels**.

B) Access the Reports – (For screen shots – see page 4.)

- a) 'Click' on Nav Bar icon  at the top right hand side of screen.
- b) 'Click' on the Navigator menu item.
- c) 'Click' on Reporting Tools
- d) 'Click' on WMU Reporting
- e) 'Click' on WMU-Human Resource Reporting
- f) 'Click' on WMU –HR Reporting

Optional- you can add this to My Favorites by clicking the  icon at the top right.

C) Running the Program Report

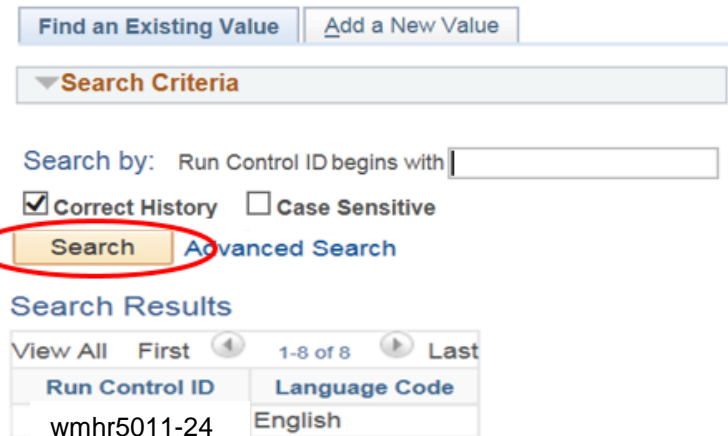
- 1) **(If this is your first time running this report, use step B, otherwise, proceed with step A).**

A) Selecting the reports

- a) Select the "Find an Existing Value" tab.
- b) 'Click' Search to continue and a list of Run Control Id's will be displayed below.
- c) Select **wmhr5011-24** Run Control ID with the Object Name of Management Data Report.

Note: If you have other report access, those reports will show here also.

Note: If you do not see the Run Control ID wmhr5011-24, proceed to Step B.



The screenshot shows the search interface with the "Find an Existing Value" tab selected. Below the tabs is a "Search Criteria" dropdown menu. The search criteria are set to "Run Control ID begins with" with an empty input field. The "Correct History" checkbox is checked, and the "Case Sensitive" checkbox is unchecked. The "Search" button is highlighted with a red circle. Below the search results, a table displays the results:

Run Control ID	Language Code
wmhr5011-24	English

B) If this is your first time running this report, you will need to add a Run Control ID.

- a. Select the "Add a New Value" tab.
- b. Enter (**wmhr5011-24**) in the Run Control ID box.
- c. 'Click' Add to continue



The screenshot shows the "Add a New Value" tab selected. Below the tabs is a "Run Control ID" input field. The "Add" button is visible at the bottom of the form.

- 2) Enter the As of Date in the following format: mm/dd/yyyy. Today's date is generally what is needed, however, a future or past date can be used.

HR Run Control/ Parms

Run Control ID wmgr5011-24 Report Manager Process Monitor **Run**

As of Date (mm/dd/yyyy)

- 3) Click 'Run'.
- 4) Select the box next to the Description that matches the first part of the Run Control ID. In this case, it is WMHR5011-Point in time Jobdata.
Note: The Server Name remains blank

Process Scheduler Request

User ID _____ Run Control ID wmgr:

Server Name Run Date

Recurrence Run Time

Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	WMHR5011-Point in time Jobdata	WMHR5011	SQR for Reporting User	Web	PDF	Distribution
<input type="checkbox"/>	WMHR5027-Job Earnings by EE	WMHR5027	SQR for Reporting User	Web	PDF	Distribution
<input type="checkbox"/>	WMHR5028-Job History for EE	WMHR5028	SQR for Reporting User	Web	PDF	Distribution

- 5) 'Click' OK.

6) 'Click' on the Process Monitor URL to view the program running and view the spreadsheet.

HR Run Control/ Params

Run Control ID wmhr5011-24 Report Manager **Process Monitor** Run

Process Instance: 1175469

As of Date (mm/dd/yyyy) 10/23/2017

Save Return to Search Notify Add Update/Display Correct History

7) The Process List 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 (should take less than five minutes.)

Process List Server List

View Process Request For

User ID Type Last 14 Days Refresh

Server Name Instance From Instance To

Run Status Distribution Status Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1175469		SQR for Reporting User	WMHR5011		09/28/2017 8:03:01PM EDT	Success	Posted	Details
<input type="checkbox"/>	1175468		SQR for Reporting User	WMHR5011		09/28/2017 8:00:07PM EDT	Success	Posted	Details

Note: Click the Refresh button periodically to get an updated Run Status.

Note: One time deal: You will probably want to set Last: to 14 Days and click Save to keep this setting. This will allow you to see 14 days of your runs. The system keeps 60 day's worth.

Note: The Run Status and Distribution Status should remain blank

8) 'Click' the Details URL once the Run Status says 'Success'. If the status says 'Error', then try re-running the program again. Double check the Run Control ID/report number is correct and make sure it matches up with the report number on the Process Scheduler Request.

NOTE: If you still receive an error, contact Human Resources at (269)387-3620 or email hr-hris@wmich.edu with a screen shot of the error.

9) Click the View Log/Trace URL.

Process Detail



Help

Process

Instance 1175469 **Type** SQR for Reporting User
Name WMHR5011 **Description** WMHR5011-Point in time Jobdata
Run Status Success **Distribution Status** Posted

Run **Update Process**

Run Control ID wmr5011-24 **Hold Request**
Location Server **Queue Request**
Server PSRPTG **Cancel Request**
Recurrence **Delete Request**
 Re-send Content **Restart Request**

Date/Time **Actions**

Request Created On 09/28/2017 8:03:10PM EDT [Parameters](#) Transfer
Run Anytime After 09/28/2017 8:03:01PM EDT [Message Log](#)
Began Process At 09/28/2017 8:03:19PM EDT [Batch Timings](#)
Ended Process At 09/28/2017 8:07:41PM EDT [View Log/Trace](#)

10) Click on the .csv file name and it will automatically open or go to the download folder. Format it and save it to your PC or LAN or leave it in PeopleSoft. It will remain in PeopleSoft for 60 days.

View Log/Trace

Report

Report ID 849683 **Process Instance** 1175469 [Message Log](#)
Name WMHR5011 **Process Type** SQR for Reporting User
Run Status Success

WMHR5011-Point in time Jobdata

Distribution Details

Distribution Node RPT_DISTNODE_RP **Expiration Date** 03/27/2018

File List

Name	File Size (bytes)	Datetime Created
SQR_WMHR5011_1175469.log	1,817	09/28/2017 8:07:41.825214PM EDT
WMHR5011_1175469.out	5,635	09/28/2017 8:07:41.825214PM EDT
wmr5011-24-2017-10-23-1175469.csv	97,713	09/28/2017 8:07:41.825214PM EDT

Distribute To

Distribution ID Type *Distribution ID
User :

Your report number displays here

Quick Click Instructions for Management Data Report

Run Control: **wmhr5011-24**

Folder: None

- 1) Sign in to PeopleSoft
- 2) Click – <Reporting Tools>
- 3) Click - <WMU Reporting>
- 4) Click - <WMU-Human Resource Reporting>
- 5) Click - <WMU – HR Reporting>
(First time only: Click then type “**wmhr5011-24**” for Run Control ID then Click <Add>)
- 6) Click – Search and select from list
If your report is not there, (first time only: Click then type “**wmhr5011-24**” for Run Control ID then Click <Add>)
- 7) Enter the As of Date then Click the <Run> box
- 8) Check the box corresponding to “**WMHR601-Point in time Jobdata**” of the report name you are running
- 9) Click <OK> (at bottom of page)
- 10) Click the Process Monitor link
- 11) Insure Last is at least 14 Days then Click <Refresh>. Note: Reports are held up to 60 days.
- 12) Keep Clicking <Refresh> until the status reads “Success” and “Posted”
- 13) Click the Details link
- 14) Click the View Log Trace link
- 15) Click the ‘report number.csv’ link to open the report