

# **PSHR Reports Viewing Scheduled Reports 9.2 PeopleSoft**

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## **HR Report Access – Viewing Scheduled Reports**

**This guide provides instructions on how to view scheduled reports from PeopleSoft.**

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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 access a report from the PeopleSoft Report Manager Folder, you must have online security access. Users who do not have the folder access can obtain it 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> Under Human Resources – Report Access, check the Report Manager Report option and list the folder needed.

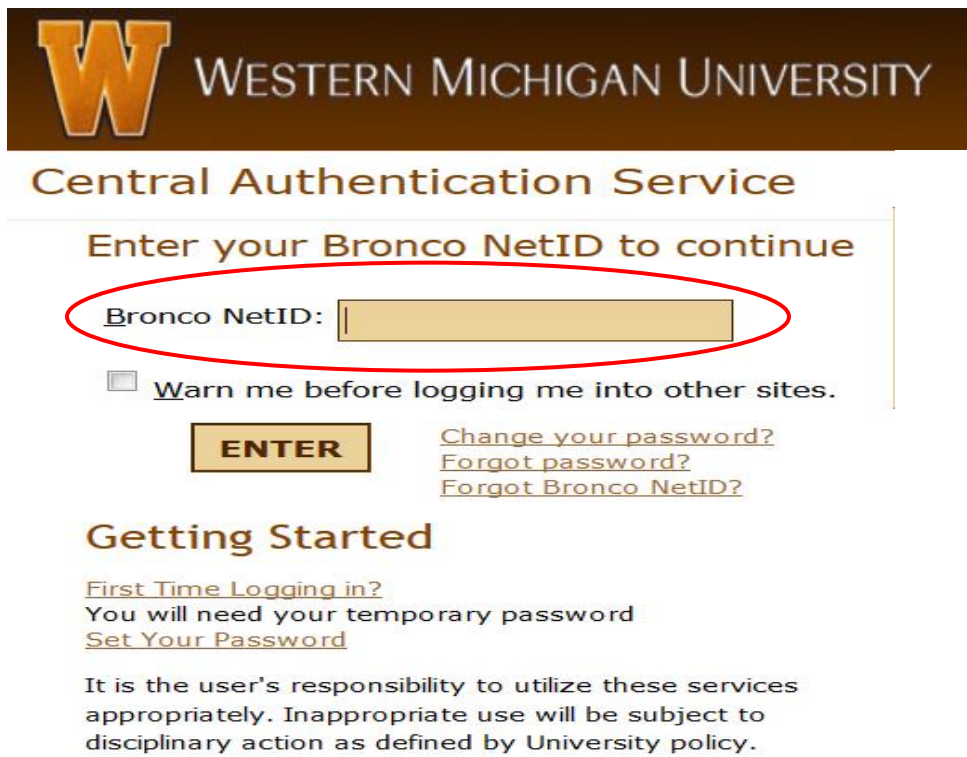
If you are unable to access the reports, or if you have questions regarding user access, please contact Human Resources at [hr-hris@wmich.edu](mailto:hr-hris@wmich.edu) or (269)387-3620. If questions or issues with the browser, contact the OIT Help Desk at 387-HELP.

## 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.

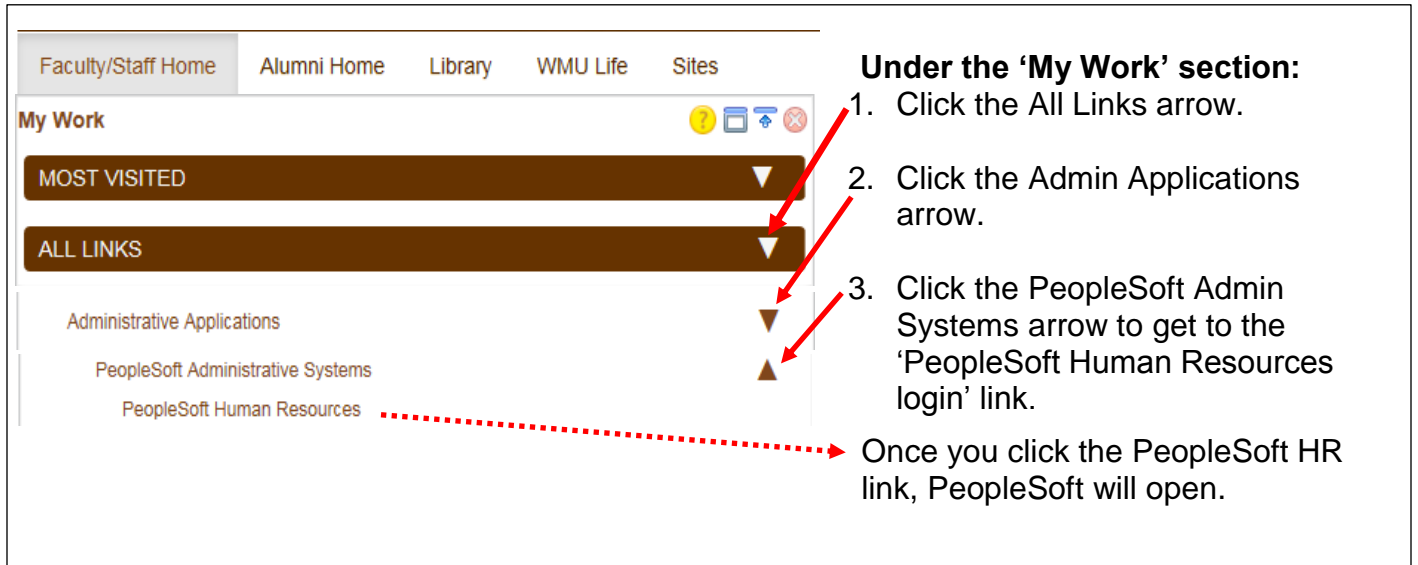
**ENTER** [Change your password?](#)  
[Forgot password?](#)  
[Forgot Bronco NetID?](#)

### 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 will see the Faculty/Staff Home Tab.



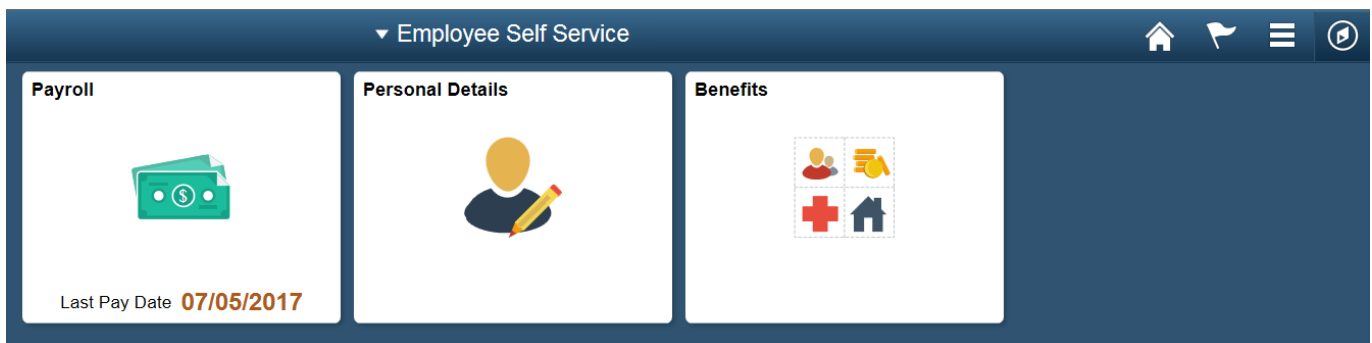
The screenshot shows the GoWMU Faculty/Staff Home page. At the top, there are navigation tabs: Faculty/Staff Home, Alumni Home, Library, WMU Life, and Sites. Below the tabs is the 'My Work' section, which is expanded to show 'ALL LINKS'. Under 'ALL LINKS', there is a sub-section for 'Administrative Applications' containing 'PeopleSoft Administrative Systems' and 'PeopleSoft Human Resources'. Red arrows and a dotted line indicate the navigation path: from the 'ALL LINKS' arrow to the 'Administrative Applications' arrow, then to the 'PeopleSoft Administrative Systems' arrow, and finally to the 'PeopleSoft Human Resources' link.





**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, PeopleSoft will open.

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

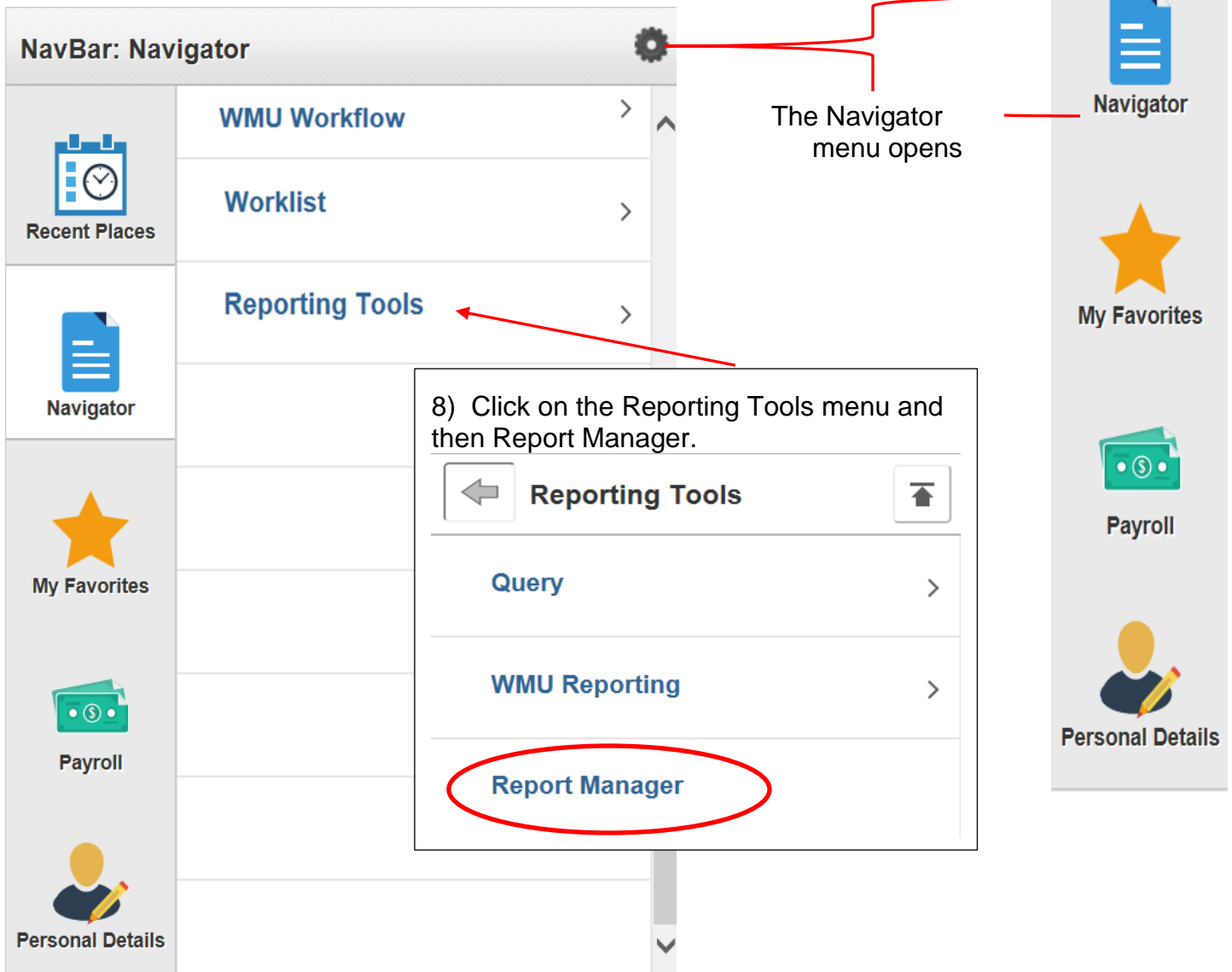


-  - Home – Click on this icon to return to the Main PeopleSoft Home page
-  - Notifications – Click on this icon to view actions and alerts
-  - Actions List – Click on this icon to save favorites and Sign Out
-  - Nav Bar – Click on this icon to navigate to certain menu items (formerly the Main Menu). 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.



## Accessing the Report



Note the name of your report/folder: \_\_\_\_\_

You will receive a system-generated email when your report is ready. The email will have the name of the folder that the report can be accessed from in PeopleSoft.

### A) Log into PeopleSoft

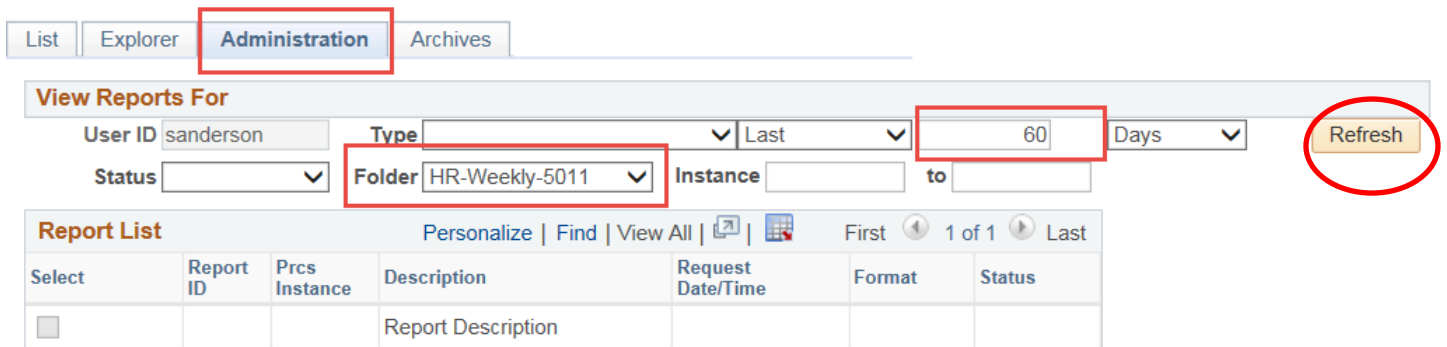
a) See *Accessing the Reporting Panels*.

### B) Access the Reports - (for screen prints see page 4.)

- 'Click' on Nav Bar icon  at the top right hand side of screen.
- 'Click' on the  Navigator menu item.
- 'Click' on Reporting Tools
- 'Click' on Report Manager
- The number of day's field should be set for at least 35 days. **NOTE: The maximum number of days a report is held is 180 days.**

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

- Click on the Administrative Tab and make sure the number of days field is set for at least 35 days. **The maximum number of days a report is held is 180 days.**



Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status
<input type="checkbox"/>			Report Description			

Select All

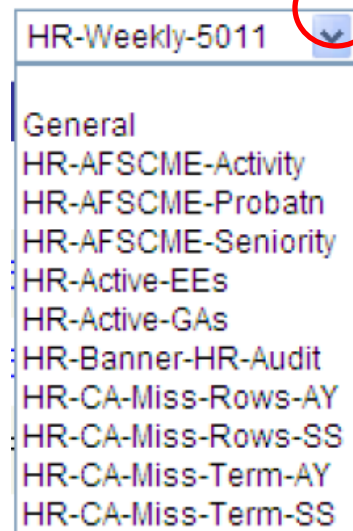
Deselect All

Delete

Click the delete button to delete the selected report(s)

Save

- Select the folder drop down menu and select the needed folder name. Click Refresh to show the reports for the selected folder.



- HR-Weekly-5011
- General
- HR-AFSCME-Activity
- HR-AFSCME-Probatn
- HR-AFSCME-Seniority
- HR-Active-EEs
- HR-Active-GAs
- HR-Banner-HR-Audit
- HR-CA-Miss-Rows-AY
- HR-CA-Miss-Rows-SS
- HR-CA-Miss-Term-AY
- HR-CA-Miss-Term-SS

- h) Click on the 'Details' link for the most current row with a status of 'Posted'. Those reports listed with a status of N/A are scheduled reports and have not run.

**NOTE:** The Request Date/Time is confusing: It reflects when the report was scheduled and NOT when it was run. It is scheduled once the current report is run successfully so this date always lags behind when it is run. The Date/Time created on the next page is when the report was run.

List Explorer Administration Archives

View Reports For

User ID sanderson Type Last 60 Days Refresh

Status Folder HR-Daily-Audit Instance to

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	849572	1175375	WMHR7043 Daily audit	09/22/2017 8:53:10AM	Acrobat (*.pdf)	Posted	Details

Personalize | Find | View All | First 1 of 1 Last

Select All  Deselect All

Delete Click the delete button to delete the selected report(s)

Save

The folder and report name may not necessarily match.

- i) Click on the file name with the extension of .PDF or .CSV. This will open the report for viewing or saving. This report will remain in PeopleSoft for 180 days.

Report Detail

Report

Report ID 849572 Process Instance 1175375 Message Log

Name WMHR7043 Process Type SQR for Reporting User

Run Status Success

WMHR7043 Daily audit

Distribution Details

Distribution Node RPT\_DISTNODE\_RP Expiration Date 03/21/2018

File List

Name	File Size (bytes)	Datetime Created
SQR_WMHR7043_1175375.log	1,812	09/22/2017 8:57:44.547041AM EDT
WMHR7043_1175375.PDF	18,283	09/22/2017 8:57:44.547041AM EDT
WMHR7043_1175375.out	15,234	09/22/2017 8:57:44.547041AM EDT
wmhr7043-1-1175375.csv	30,662	09/22/2017 8:57:44.547041AM EDT

Distribute To

## Quick Click Instructions – Viewing Scheduled Reports

Folder: Name of your folder(s): \_\_\_\_\_

- 1) Sign in to PeopleSoft
- 2) Click – <Reporting Tools>
- 3) Click - <Report Manager>
- 4) Click - <Administration> Tab
- 5) Select the report name by clicking on the drop down box next to 'folder'
- 6) Type: Leave Blank
- 7) Description is the name of the report you are accessing
- 8) Click the Details link
- 9) Click the View Log Trace link
- 15) Click the 'report number.csv / i.e. WMHR5011.csv ' link to open the report