PSHR Reports
Viewing Scheduled Reports
9.2 PeopleSoft

HR Report Access – Viewing Scheduled Reports
This guide provides instructions on how to view scheduled reports from PeopleSoft.

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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.

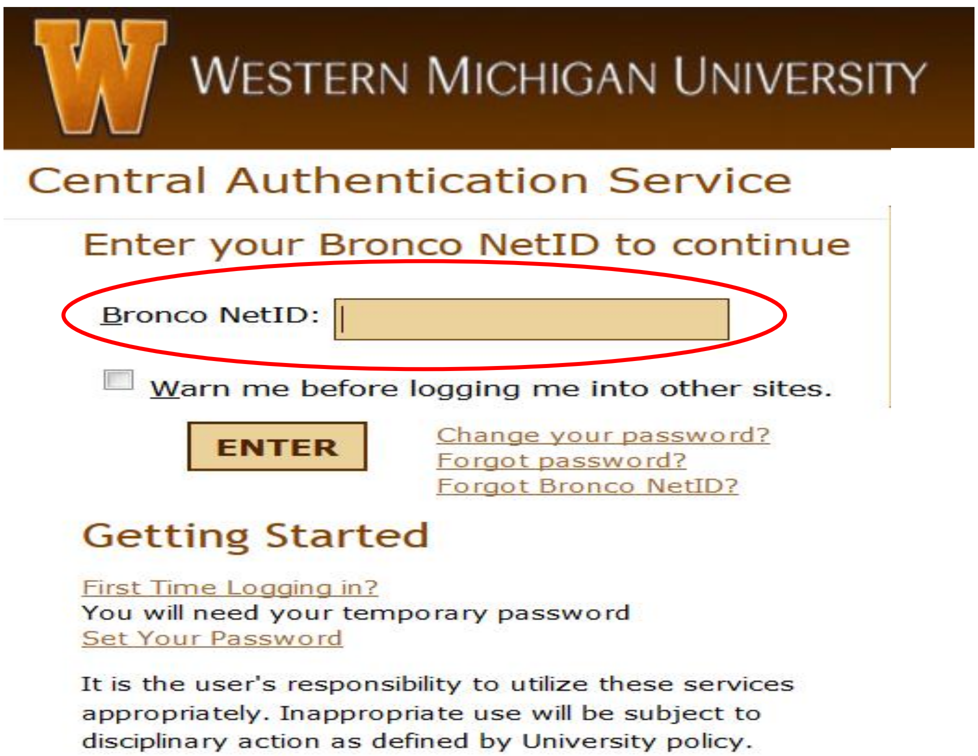
If you are unable to access the reports, or if you have questions regarding user access, please contact Human Resources at hr-hris@wmich.edu or (269)387-3620. If questions or issues with the browser, contact the OIT Help Desk at 387-HELP.

Web Browser Requirements

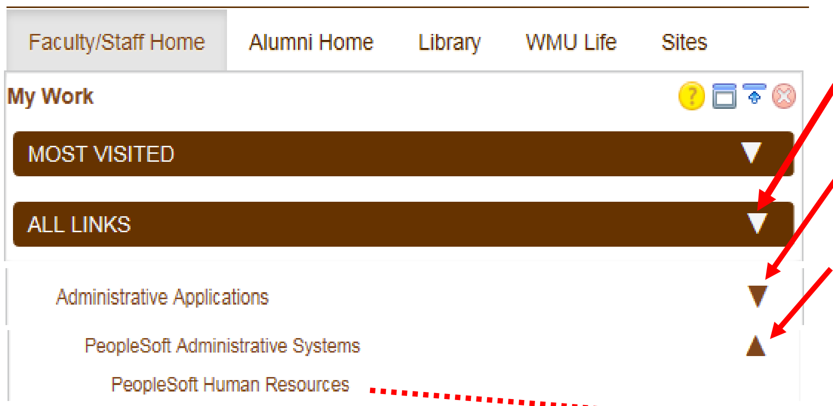
PeopleSoft works best with Internet Explorer version 11. If you are using a Mac, the Safari browser works best but may work with Chrome.

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.



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

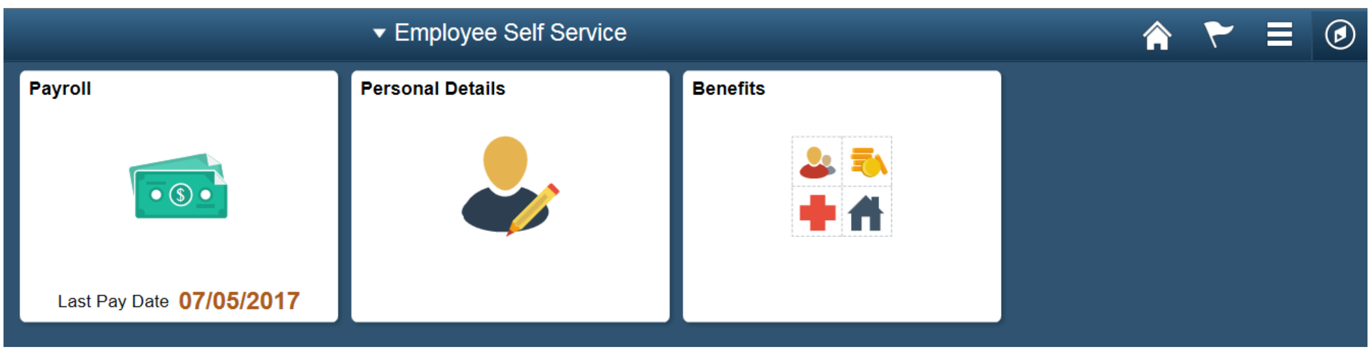


Under the 'My Work' section:

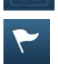
1. Click the All Links arrow.
2. Click the Admin Applications arrow.
3. Click the PeopleSoft Admin Systems arrow to get to the 'PeopleSoft Human Resources login' link.

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

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



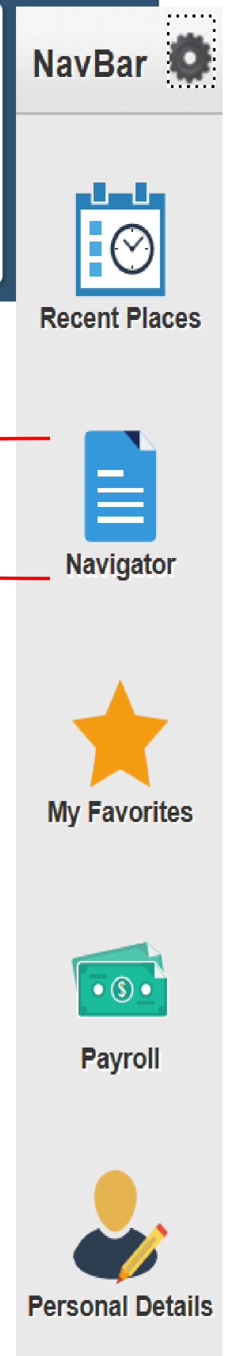
 - Home – Click on this icon to return to the Main PeopleSoft Home page

 - Notifications – Click on this icon to view actions and alerts

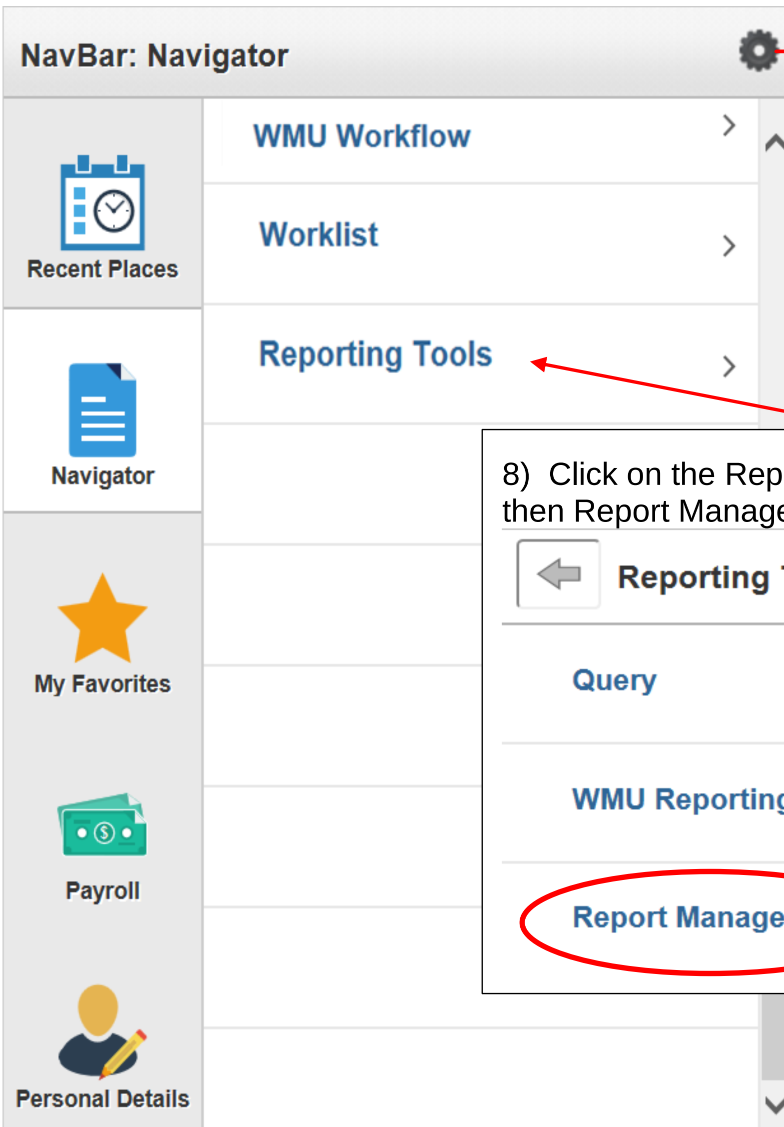
 - Actions List – Click on this icon to save favorites and Sign Out

 - 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.



The Navigator menu opens

8) Click on the Reporting Tools menu and then Report Manager.

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

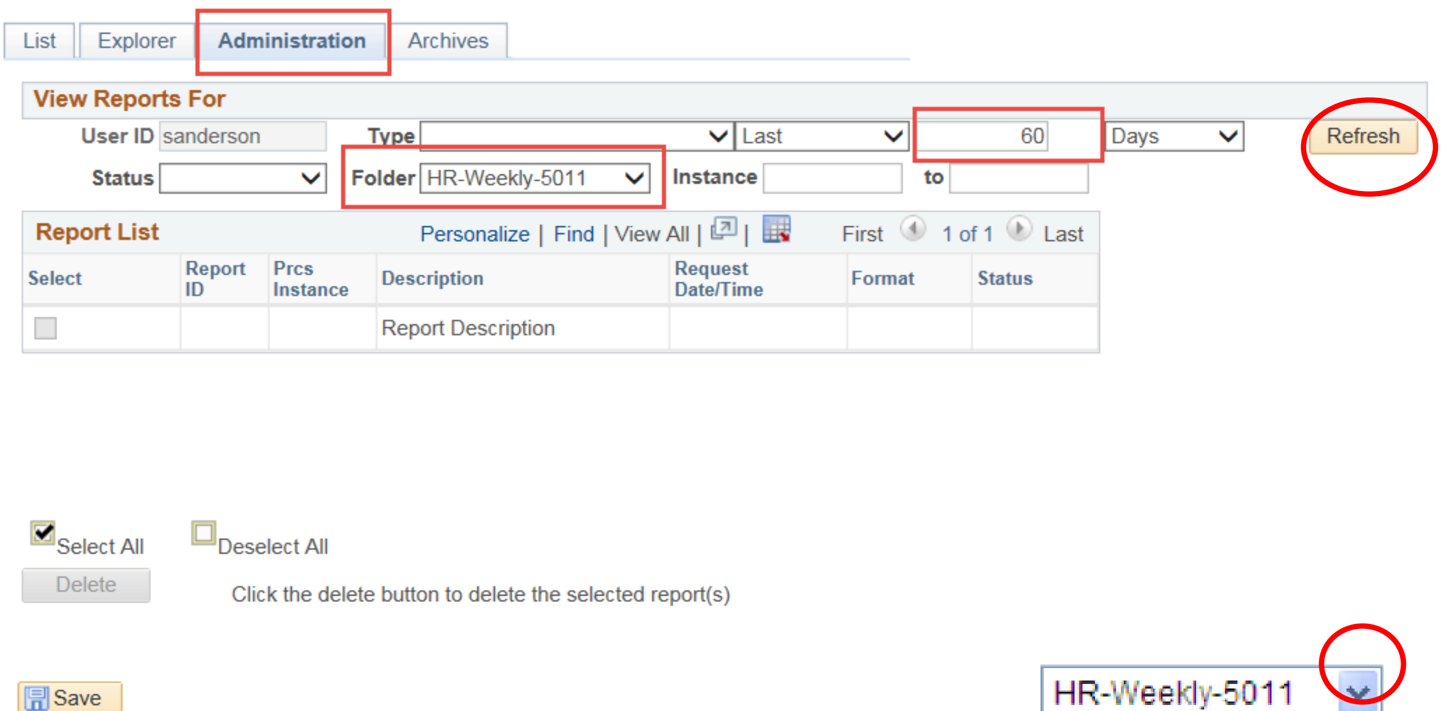
a) See ***Accessing the Reporting Panels***.

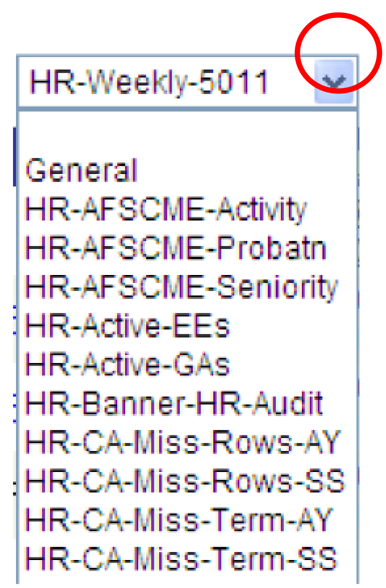
B) Access the Reports - (for screen prints see page 4.)

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 Report Manager
e) 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.

f) 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.

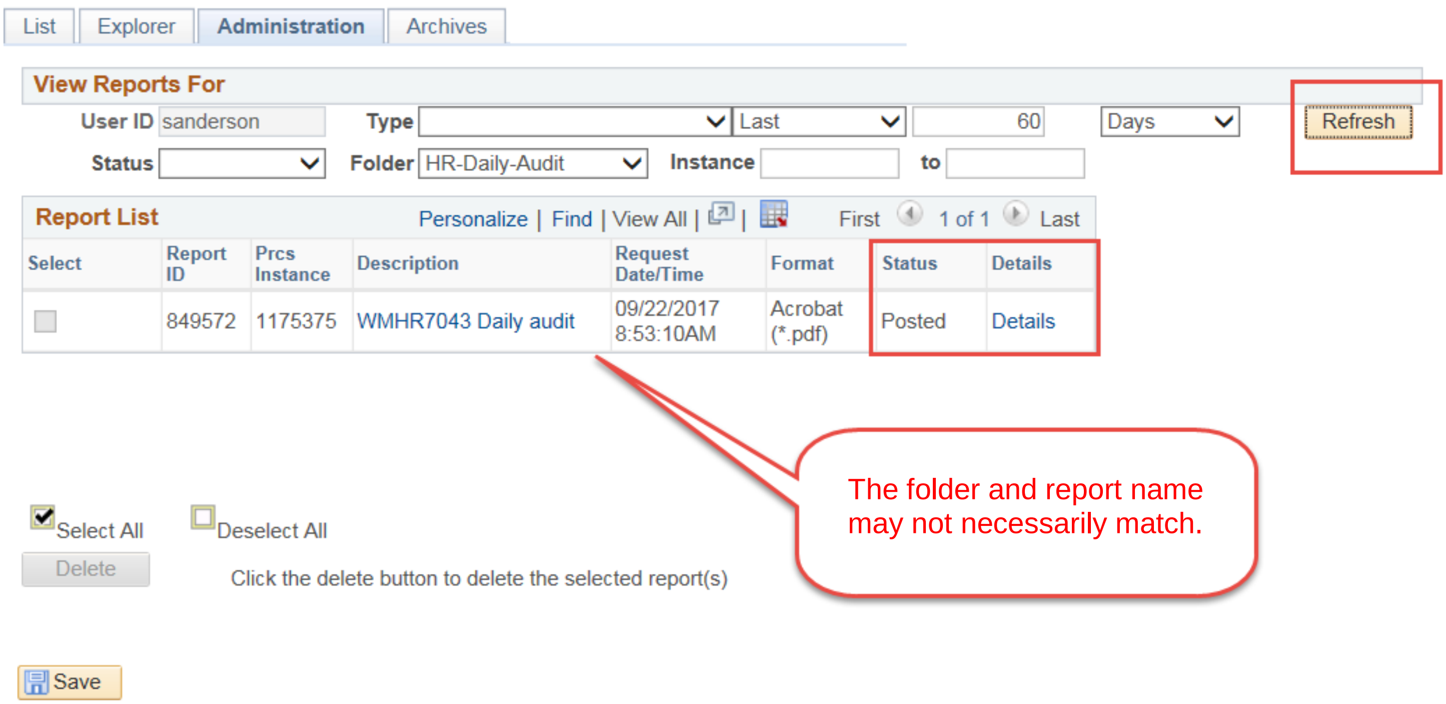




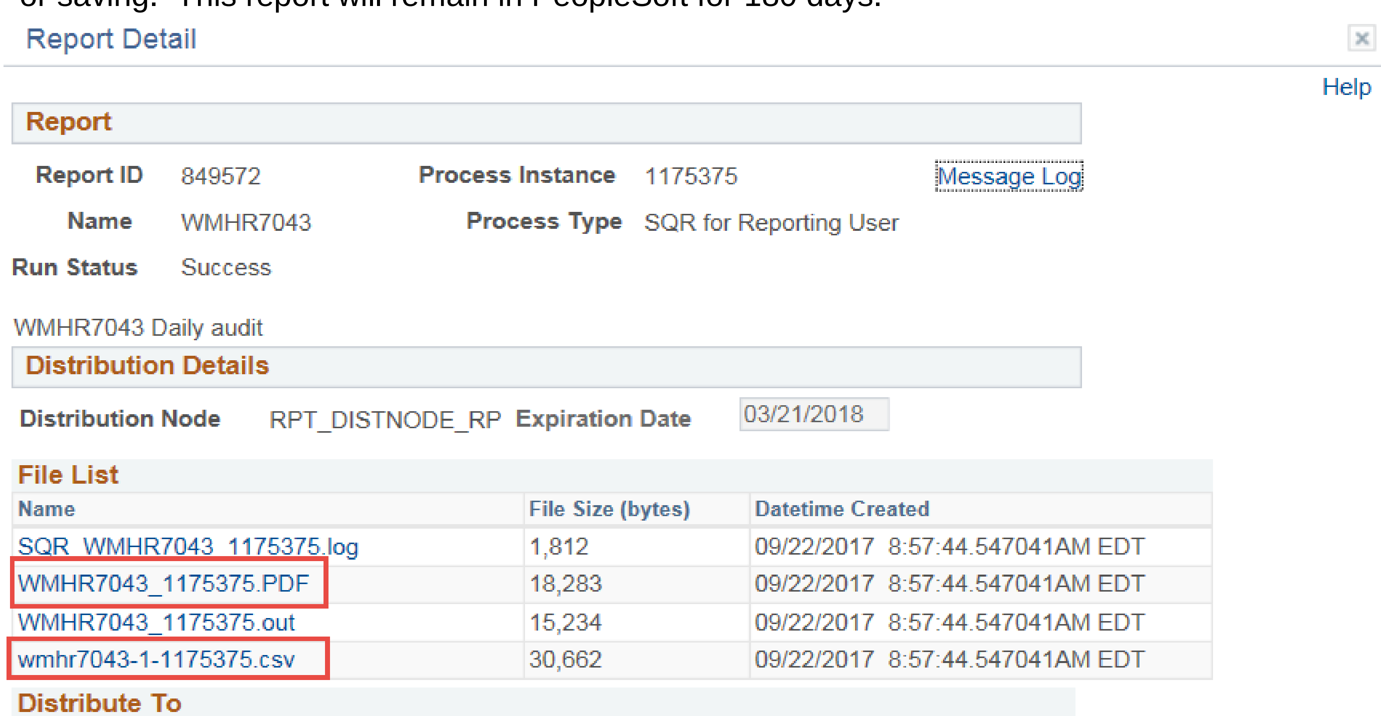
g) Select the folder drop down menu and select the needed folder name. Click Refresh to show the reports for the selected folder.

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.



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.



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