

6.14 (g) - How to Run CAT Reports – HRS Change Report

Purpose and Overview

The HRS Change report identifies employee records that exist in the CAT and have undergone a change in HRS. A change is defined as an update to the following fields: Business Unit, HR Department, Position Number, Jobcode, Pay Basis, Title, FTE, Payroll Status, or Comprate, as well as Hires, Rehires, Transfers, or Terminations. The HRS Change report is only of use when the Automatic HRS Update Feed is ON.

Process Inputs

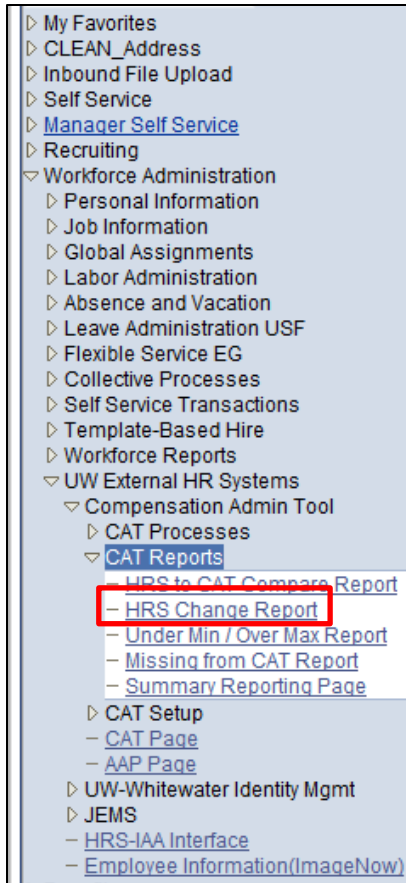
- Fiscal Year
- Effective Dates
- Business Unit
- Division (Optional)
- Department (Optional)
- Employee Class

Process Outputs

- Excel document with a population that meets the run control criteria and has undergone a change in HRS in one of the key fields outlined above.

Procedure Steps

1. Navigate to **Workforce Administration > UW External HR Systems > Compensation Admin Tool > CAT Reports > HRS Change Report.**



2. Click Search under the Find an Existing Value tab to select a previously created Run Control ID, or create a new Run Control ID by selecting **Add a New Value**. To create a new Run Control ID, assign a unique identifier as the Run Control ID (eg. initials_date_etc.) into the Run Control ID box and select **Add**.
3. *Note: Run Control ID sets the report parameters. Users can create one ID, and use it to process multiple reports/processes or create a new ID for each report/process.*

HRS Change Report

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

4. Enter parameters to define criteria for the HRS Change Report.
 - a. Select the upcoming **Fiscal Year** used for CAT budget planning purposes. This field will default to the latest fiscal year setup in the CAT.
 - b. Select a range of effective dates within the chosen fiscal year.
 - i. Select a **From Date**.
 - ii. Select a **To Date**.
 - c. Select a **Business Unit**.
 - d. If desired, select a **Division**.
 - e. If desired, select a **Department**.
 - i. If available, the **Department** field will become editable when the user selects a Division from the search tool or enters one manually and presses the tab button out of the field.
 - f. Click **Select Values** in the employee class box if you wish to exclude certain employee classes from the report. The default is for all employee classes to be included. Employee classes that are not included in the CAT will not pull onto CAT reports.
 - g. Click **Save** in the bottom left to save the parameters for the report.
 - h. Click **Run** in the top right to run the report.

HRS Change Report

Run Control ID: Change_Report

[Report Manager](#) [Process Monitor](#)

Run

HRS Change Run Parameters

<p>*Fiscal Year <input type="text" value="2017"/></p> <p>*From Date <input type="text" value="12/01/2015"/></p> <p>*To Date <input type="text" value="12/14/2015"/></p> <p>*Business Unit <input type="text" value="UWMSN"/></p> <p>Division <input type="text"/></p> <p>Department <input type="text"/></p>	<p>Employee Class</p> <p>Employee Class - All Values: <input checked="" type="checkbox"/></p> <p style="text-align: center; background-color: #ffffcc; border: 1px solid #ccc; padding: 5px;">Select Values</p>
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Save Notify

Add Update/Display

5. User will be automatically directed to the Process Scheduler Request page. From this page, select **OK**.

Process Scheduler Request

User ID: 00699002 Run Control ID: ABC01

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	CAT HRS Change Report	UW_CAT_HRCH	Application Engine	Web <input type="text"/>	TXT <input type="text"/>	Distribution

6. Note the Process Instance number under the Process Monitor link. This designates the specific instance of the report run.
7. Click **Process Monitor** at the top right of the window.

HRS Change Report

Run Control ID: Change_Report [Report Manager](#) [Process Monitor](#)

Process Instance: 2084508

HRS Change Run Parameters

*Fiscal Year

*From Date

*To Date

*Business Unit

Division

Department

Employee Class

Employee Class - All Values:

8. Search for your process instance number under Process List, which will indicate the status of the report generation. When the report is complete, Run Status will be “Success” and Distribution Status will be “Posted”.
 - a. If Run Status is “Queued,” it indicates that the report generation is waiting to start.
 - b. If Run Status is “Processing,” it indicates that the report generation is processing.
 - c. Click **Refresh** at the top right of the window to refresh the status of the document.

The screenshot shows the 'Process List' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below this is an 'Actions' section with search filters for User ID (00699002), Type, Last, 1 Days, and a Refresh button. There are also fields for Server, Name, Instance, Run Status, and Distribution Status, with a 'Save On Refresh' checkbox checked. The main table, titled 'Process List', has columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The first row shows Instance 2082034, Process Type Application Engine, Process Name UW_CAT_HRCH, User 00699002, Run Date/Time 11/24/2015 3:11:12PM CST, Run Status Processing (highlighted in red), and Distribution Status N/A. A Details link is visible at the end of the row.

9. Once the Run Status hits “Success” and the Distribution Status hits “Posted,” download the output.
 - a. Click **Details**.

This screenshot is identical to the one above, but the process status has changed. The Run Status is now 'Success' (highlighted in yellow) and the Distribution Status is 'Posted' (highlighted in yellow). The 'Details' link at the end of the row is now highlighted with a red box, indicating it should be clicked.

b. Click **View Log/Trace** at the bottom right of the window.

Process Detail	
Process	
Instance 2082034	Type Application Engine
Name UW_CAT_HRCH	Description CAT HRS Change Report
Run Status Success	Distribution Status Posted
Run	Update Process
Run Control ID ABC01	<input type="radio"/> Hold Request
Location Server	<input type="radio"/> Queue Request
Server PSUNX	<input type="radio"/> Cancel Request
Recurrence	<input checked="" type="checkbox"/> Delete Request
	<input type="radio"/> Restart Request
Date/Time	Actions
Request Created On 11/24/2015 3:12:46PM CST	Parameters Transfer
Run Anytime After 11/24/2015 3:11:12PM CST	Message Log View Locks
Began Process At 11/24/2015 3:13:07PM CST	Batch Timings
Ended Process At 11/24/2015 3:20:39PM CST	View Log/Trace
OK Cancel	

- c. Under File List, click the file with the .xls extension to download the output. Note: you may have two .xls outputs if you have any additional splits.

View Log/Trace

Report

Report ID: 1168712 Process Instance: 2082034 [Message Log](#)

Name: UW_CAT_HRCH Process Type: Application Engine

Run Status: Success

CAT HRS Change Report

Distribution Details

Distribution Node: HRDEV_RPTNOD Expiration Date: 11/23/2016

File List

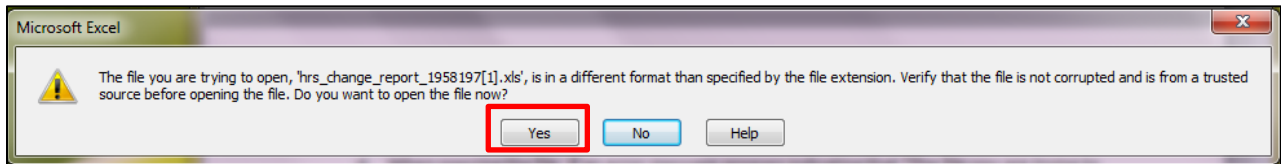
Name	File Size (bytes)	Datetime Created
AE UW CAT HRCH 2082034.AET	3,775	11/24/2015 3:20:39.336835PM CST
AE UW CAT HRCH 2082034.log	530	11/24/2015 3:20:39.336835PM CST
AE UW CAT HRCH 2082034.trc	205	11/24/2015 3:20:39.336835PM CST
HRS Change Report 2082034.xls	5,645	11/24/2015 3:20:39.336835PM CST

Distribute To

Distribution ID Type	*Distribution ID
User	00699002

[Return](#)

- d. When opening the file in Excel, if an error message appears indicating that “The file you are trying to open...is in a different format than specified by the file extension,” click **Yes**.



- e. Note that different internet browsers may have different opening processes.

10. Review the report.

- a. The excel output file will look like the screenshot below

HRS Change Report					
Report Parameters:					
Run Control ID:	Test_01	Process Instance:	1958197		
Run Date:	08/20/2015	Run By:	00833917		
Fiscal Year:	2016	Division:			
From Date:	08/25/2015	Department:	AS,CJ,CL,CP,ET1,ET2,ET3,ET4,FA,LI,OT1,O		
To Date:	08/24/2016	Employee Class:	T2,OT3,OT4,OT5,OT6,SA1,SA2,SA3,SA4,S		
Business Unit:	UWLAC		A5,SA6,SA7,SH		
NAME	EMPLOYEE ID	EMPLOYEE RECORD NUMBER	EMPLOYEE CLASS	CONTINUITY CODE	EXPECTED END DATE
ANDREA HANSEN	00145000	0	AS	02C	01/14/2016
SCOTT REBER	00182860	0	AS	02C	05/29/2016
JENNIFER MUEHLENKAMP	00266505	6	AS	02A	09/16/2015
LINDA SHERONY	00322182	0	AS	02B	01/14/2016
BEE LO	00402932	0	AS	02B	01/14/2016
GREGORY ORMES	00427094	0	AS	02C	05/29/2016
JOSHUA BONNELL	00569828	0	SA5	02C	05/29/2016
ALLISON SAUPPE	00580733	0	AS	02C	05/28/2016
SAMANTHA STIPAN	00581632	0	SA3	02C	05/29/2016

- b. The report displays one row per emplid/emprcd combination per row
 - i. For a new hire – only the updated fields will be populated.
 - ii. For a termination – only the original fields will be populated.
 - iii. For a transfer – both original and updated fields will be populated.
 - iv. For a field that has not undergone no change in HRS – both original and updated fields will be blank
 - v. If more than one ‘action/action reason’ has been entered in HRS in the defined time period, the most recent change to an emplid/emprcd will appear
- b. A description of the different header fields is displayed in Table 1 below
- c. Action items that may be taken based on the report output are listed in Table 2

Tables

Table 1: Output Header Fields	
Report Parameters	
Field Name	Description
Run Control ID	The run control identification entered when report was created.
Run Date	The date the report was created.
Fiscal Year	The fiscal year of the data pulled for the report.
From Date	The starting effective date of the CAT you wish to compare against in HRS.
To Date	The ending effective date of the CAT you wish to compare against in HRS.
Business Unit	The Business Unit selected in the run control.
Process Instance	The number assigned by PeopleSoft for each process.
Run By	The user ID of the user who ran the report.

Division	The Division (if any) selected in the run control.
Department	The Department (if any) selected in the run control.
Employee Class	The Employee Class as selected in the run control
Report Columns	
Column	Description
NAME	First & Last name from HRS for employee records that exist in the CAT and have had a change in HRS. This value should always display on the report.
EMPLOYEE ID	EmplID from HRS for employee records that exist in the CAT and have had a change in HRS. This value should always display on the report.
EMPLOYEE RECORD NUMBER	Employee Record from HRS for employee records that exist in the CAT and have had a change in HRS. This value should always display on the report.
EMPLOYEE CLASS	Empl Class from HRS for empl records that exist in the CAT and have had a change in HRS. This value should always display on the report.
CONTINUITY CODE	Continuity Code from HRS for employee records that exist in the CAT and have had a change in HRS. This value should always display on the report.
EXPECTED END DATE	EJED from HRS for empl records that exist in the CAT and have had a change in HRS. This value should always display on the report.
BASE CAT COMPRATE	The Comprate of the employee record from CAT.
ORIGINAL BUSINESS UNIT	Business Unit from HRS before the change for empl records that exist in the CAT and have had a change in HRS.
UPDATED BUSINESS UNIT	Business Unit from HRS after the change (from max effective row) for empl records that exist in the CAT and have had a change in HRS.
ORIGINAL HOME DEPT	Home Dept from HRS before the change for empl records that exist in the CAT and have had a change in HRS.
UPDATED HOME DEPT	Home Dept from HRS after the change (from max effective row) for empl records that exist in the CAT and have had a change in HRS.
ORIGINAL HRS POSITION NUMBER	Position Number from HRS before the change for empl records that exist in the CAT and have had a change in HRS.
UPDATED HRS POSITION NUMBER	Position Number from HRS after the change (from max effective row) for empl records that exist in the CAT and have had a change in HRS.
ORIGINAL HRS JOB CODE	Job Code from HRS before the change for empl records that exist in the CAT and have had a change in HRS.
UPDATED HRS JOB CODE	Job Code from HRS after the change (from max effective row) for empl records that exist in the CAT and have had a change in HRS.
ORIGINAL PAY BASIS	Pay Basis from HRS before the change for empl records that exist in the CAT and have had a change in HRS.
UPDATED PAY BASIS	Pay Basis from HRS after the change (from max effective row) for empl records that exist in the CAT and have had a change in HRS.
ORIGINAL JOB TITLE	Title from HRS before the change for empl records that exist in the CAT and have had a change in HRS.
UPDATED JOB TITLE	Title from HRS after the change (from max effective row) for empl records that exist in the CAT and have had a change in HRS.
ORIGINAL FTE	FTE from HRS before the change for empl records that exist in the CAT and have had a change in HRS.
UPDATED FTE	FTE from HRS after the change (from max effective row) for empl records that exist in the CAT and have had a change in HRS.

ORIGINAL PAYROLL STATUS	LOA status from HRS before the change for empl records that exist in the CAT and have had a change in HRS.
UPDATED PAYROLL STATUS	LOA status from HRS after the change (from max effective row) for empl records that exist in the CAT and have had a change in HRS.
ORIGINAL HRS COMPRATE	Comprate from HRS before the change for empl records that exist in the CAT and have had a change in HRS.
UPDATED HRS COMPRATE	Comprate from HRS after the change (from max effective row) for empl records that exist in the CAT and have had a change in HRS.
EMPLOYEE HIRED?	Y/N based on if there is a Hire row in HRS in the specified effective dated range.
EMPLOYEE REHIRED?	Y/N based on if there is a Rehire row in HRS in the specified effective dated range.
EMPLOYEE TRANSFERRED?	Y/N based on if there is a Termination row in HRS in the specified effective dated range.
EMPLOYEE TERMINATED?	Y/N based on if there is a Transfer row in HRS in the specified effective dated range.

Table 2: Action Items based on Report Output	
Job Changes in HRS that Occurred	Action Item
Title Change	Review and Potentially Edit Comp Increases
Comprate Change	Review and Potentially Edit Comp Increases
New Hire	Potentially Add to CAT
FTE, EJED Change	Potentially Edit Planned FTE or Remove from CAT