

6.14(a) - How to Run CAT Reports – Record Errors Report

Purpose and Overview

The Record Errors Report displays all records in the budget that have generated any sort of employee-level error based on the edits that have been set up in the CAT. This report contains all Job Level Errors, Compensation Section Errors, Funding Edit Errors, and Funding Section Errors. The run control allows users to include all errors or separate them out by type (funding edit, funding section, job level or compensation). This report must be clear of all errors prior to submission for Madison Budget Office budget checkout.

Job Level Errors: Users will be able to save the page but receive a job level error warning if planned FTE is 0 or more than 1.0. The CAT initialization process loads data for all active jobs in HRS that have commitment accounting funding assigned, therefore, it loads jobs with a leave status in addition to loading data for interim roles. All errors must be corrected so that employees fall do not exceed 1.0 FTE.

Funding Edit Errors: Users will be able to save the page but receive a funding edit error warning if any of the funding strings are invalid.

- If the Okay to Load to HRS Commit Accounting box is checked, all funding strings must pass the future year SFS ACTUALS edit tree. Users need to have accurate department ID, fund, prog code combinations in all cases as well as accurate project number where it is required.
- If the Okay to Load to HRS Commit Accounting box is unchecked, all funding strings must pass the future year SFS CAT Budget Ledger edit tree. Users need to have accurate department ID, fund, prog code combinations in all cases but project numbers are not required.

Funding Section Errors: Users of the CAT will be able to save the CAT page even if certain funding errors exist, such as math errors related to different funding splits. This will allow you to work with other CAT users to finalize the funding data for shared employees.

Compensation Section Errors: This report will also capture the duplications when a pending placeholder increase that was noted in the CAT has been entered into HRS and flowed to the CAT record through the HRS data feed process.

Process Inputs

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

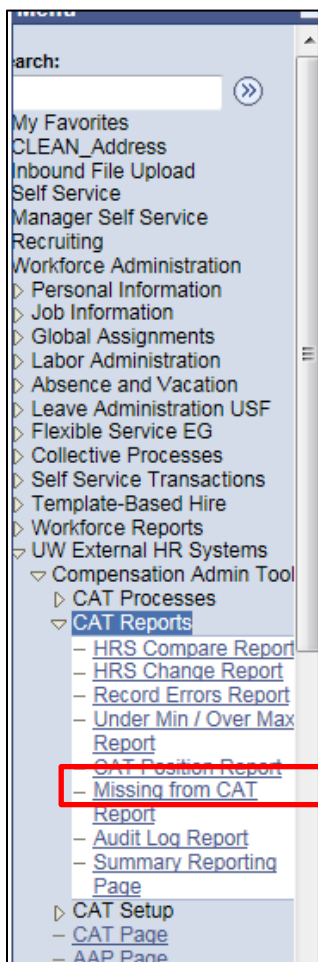
- Employee Class

Process Outputs

- Excel document with a population that meets the run control criteria and has an error in the CAT.

Procedure Steps

1. Navigate to **Workforce Administration > UW External HR Systems > Compensation Admin Tool > CAT Reports > Record Errors 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.*

Record Errors Report

Find an Existing Value

Add a New Value

Run Control ID: record_error

Add

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

4. Enter parameters to define criteria for the Record Errors Report.
 - a. Select the upcoming **Fiscal Year** used for CAT budgeting planning purposes. This field will default to the latest fiscal year setup in the CAT.
 - b. Select a **Business Unit**.
 - c. If desired, select a **Division**.
 - d. 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.
 - e. 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.
 - f. Select the types of errors you wish you view in the output by checking the associated boxes
 - i. If compensation errors are included in the run control, an effective date range must be chosen by pressing the **Effective Dates** buttons next to the From Date and To Date. **In order to capture duplicate action reason rate changes that may have occurred since the budget was initialized; a from date of the beginning of the current fiscal year and an end date of the end of the current fiscal year (for FY19 7/1/2018 and 6/30/2019).**
 - 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.

Record Errors Report Run

Run Control ID: record_error

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

Run

Record Errors Report Run Parameters

*Fiscal Year	2017
*Business Unit	UWMSN
Division	
Department	

Employee Class

Employee Class - All Values:

Select Values

Include Funding Edit Errors:

Include Job Level Errors:

Include Funding Section Errors:

Include Compensation Errors: From Date 07/01/2016 To Date 06/30/2017

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: 11/24/2015

Recurrence: ▼ Run Time: 3:48:54PM [Reset to Current Date/Time](#)

Time Zone:

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Record Errors Report	UW_CAT_RDERR	Application Engine	Web ▼	TXT ▼	Distribution

OK Cancel

- Note the Process Instance number under the Process Monitor link. This designates the specific instance of the report run.

Record Errors Report Run

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

Process Instance:2084402

Record Errors Report Run Parameters

<p>*Fiscal Year <input type="text" value="2017"/> <small>🔍</small></p> <p>*Business Unit <input type="text" value="UWMSN"/> <small>🔍</small></p> <p>Division <input type="text"/> <small>🔍</small></p> <p>Department <input type="text"/></p> <p>Include Funding Edit Errors: <input checked="" type="checkbox"/></p> <p>Include Job Level Errors: <input checked="" type="checkbox"/></p> <p>Include Funding Section Errors: <input checked="" type="checkbox"/></p> <hr/> <p>Include Compensation Errors: <input checked="" type="checkbox"/></p>	<div style="border: 1px solid #ccc; padding: 5px; background-color: #d9ead3;"> <div style="background-color: #d9ead3; padding: 2px 5px; border: 1px solid #ccc;">Employee Class</div> <p>Employee Class - All Values: <input checked="" type="checkbox"/></p> <div style="background-color: yellow; padding: 2px 5px; text-align: center; border: 1px solid #ccc; margin-top: 5px;">Select Values</div> </div>
<p>From Date <input type="text" value="07/01/2016"/> <small>📅</small> To Date <input type="text" value="06/30/2017"/> <small>📅</small></p>	

Save

Notify

Add

Update/Display

- Click **Process Monitor** at the top right of the window.
- 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".
 - If Run Status is "Queued," it indicates that the report generation is waiting to start.
 - If Run Status is "Processing," it indicates that the report generation is processing.
 - Click **Refresh** at the top right of the window to refresh the status of the document.
- Once the Run Status hits "Success" and the Distribution Status hits "Posted," download the output.
 - Click **Details**.

Process List Server List

Actions

User ID: 00699002 Type: [] Last [] 1 Days Refresh

Server: [] Name: [] Instance: [] to []

Run Status: [] Distribution Status: [] Save On Refresh

Process List Personalize Find View All First 1-7 of 7 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2082045		Application Engine	UW_CAT_RDERR	00699002	11/24/2015 3:48:54PM CST	Success	Posted	Details

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

Process Detail

Process

Instance: 2082045 Type: Application Engine
 Name: UW_CAT_RDERR Description: Record Errors Report
 Run Status: Success Distribution Status: Posted

Run **Update Process**

Run Control ID: ABC01
 Location: Server
 Server: PSUNX
 Recurrence: []

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time **Actions**

Request Created On: 11/24/2015 3:49:14PM CST
 Run Anytime After: 11/24/2015 3:48:54PM CST
 Began Process At: 11/24/2015 3:49:39PM CST
 Ended Process At: 11/24/2015 3:49:52PM CST

Parameters Transfer
 Message Log View Locks
 Batch Timings
 View Log/Trace

OK Cancel

- c. Under File List, click the file with the .xls extension to download the output.

View Log/Trace

Report

Report ID: 1168723 Process Instance: 2082045 [Message Log](#)

Name: UW_CAT_RDERR Process Type: Application Engine

Run Status: Success

Record Errors Report

Distribution Details

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

File List

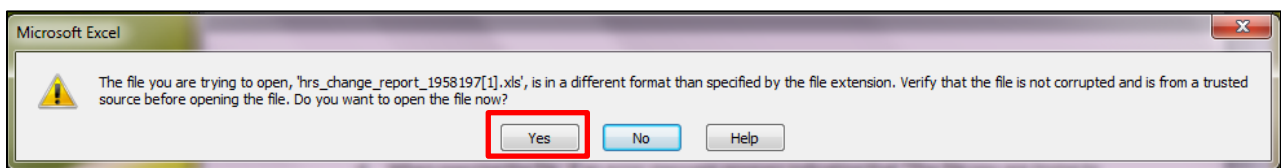
Name	File Size (bytes)	Datetime Created
AE UW CAT RDERR 2082045.AET	4,214	11/24/2015 3:49:52.715402PM CST
AE UW CAT RDERR 2082045.log	535	11/24/2015 3:49:52.715402PM CST
AE UW CAT RDERR 2082045.trc	205	11/24/2015 3:49:52.715402PM CST
CAT Record Errors Rpt 2082045.xls	8,772	11/24/2015 3:49:52.715402PM CST

Distribute To

Distribution ID Type	*Distribution ID
User	00699002

[Return](#)

- d. When opening the file, 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**.



10. Review the report.
- a. The excel output file will look like the **screenshot below**:

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9	Column 10
JOB LEVEL ERRORS	COMPENSATION ERRORS	FUNDING EDIT ERRORS	FUNDING ERRORS	ERROR MESSAGE	NAME	EMPLID	EMPL RCD	HOME DEPT	EMPL CLA
X				Planned FTE = 0		00013134	1	W101000	OT1
X						00013134	1	W101000	OT1
X				Planned FTE = 0		00034112	0	Y701000	CP
X				Planned FTE = 0		00034112	0	Y701000	CP
X						00034112	0	Y701000	CP
X						00034112	0	Y701000	CP
X				Planned FTE = 0		00051084	0	W286000	CP
X				Planned FTE = 0		00080221	0	W451000	CL
X						00080221	0	W451000	CL
X				Planned FTE = 0		00155853	0	W282500	CP
X				Planned FTE = 0		00254067	0	W265000	CP
X				Planned FTE = 0		00406046	0	W101000	CL
X						00406046	0	W101000	CL
X				Planned FTE = 0		00706217	0	W010500	SH
X						00706217	0	W010500	SH
X				Planned FTE = 0		00709497	0	W010500	SH
X						00709497	0	W010500	SH
X				Planned FTE = 0		00738199	1	W010200	SH
X						00738199	1	W010200	SH
X				Planned FTE = 0		00748242	0	W010200	SH
X						00748242	0	W010200	SH
X				Planned FTE = 0		00754092	1	W010200	SH
X						00754092	1	W010200	SH

- b. The report displays four different types of errors, demarcated for each string by an X under the specific record type.
- c. Employee records may appear in multiple sections of the report because:
 - i. Employee records with more than one error will appear as multiple rows on the report
 - ii. Compensation increases and funding splits are added as horizontal rows under each employee such as follows:

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
JOB LEVEL ERRORS	COMPENSATION ERRORS	FUNDING EDIT ERRORS	FUNDING ERRORS	ERROR MESSAGE	NAME	EMPLID	EMPL RCD
X				Planned FTE = 0	JESSICA	00034112	0
X				Planned FTE = 0	JESSICA	00034112	0
X					JESSICA	00034112	0
X					JESSICA	00034112	0

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
JOB LEVEL ERRORS	COMPENSATION ERRORS	FUNDING EDIT ERRORS	FUNDING ERRORS	ERROR MESSAGE	NAME	EMPLID	EMPL RCD
	X			Action reason occurs more than once	JESSICA	00034112	0
	X			Action reason occurs more than once	JESSICA	00034112	0
	X				JESSICA	00034112	0
	X				JESSICA	00034112	0

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
JOB LEVEL ERRORS	COMPENSATION ERRORS	FUNDING EDIT ERRORS	FUNDING ERRORS	ERROR MESSAGE	NAME	EMPLID	EMPL RCD
			X		JESSICA	00034112	0
			X		JESSICA	00034112	0
			X	Total Funding Distribution Percent must equal to 100%	JESSICA	00034112	0
			X	Total Funding Distribution Percent must equal to 100%	JESSICA	00034112	0

- d. A description of the different header fields is displayed in **Table 1** below.
- e. A description of error messages, grouped by error type is displayed in **Table 2** below.
- f. A description of column headers past the error columns is displayed in **Table 3** below.

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 for which the report is pulling data.
Business Unit	The Business Unit selected in the run control.
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
Process Instance	The number assigned by PeopleSoft for each process.
Run By	The user ID of the user who ran the report.
Include Job Level Errors	Y/N dependent on whether Job Level Errors were selected in the run control.
Include Funding Edit Errors	Y/N dependent on whether Funding Edit Errors were selected in the run control
Funding Section Errors	Y/N dependent on whether Funding Edit Errors were selected in the run control.
Include Compensation Errors	Y/N dependent on whether Compensation errors were selected in the run control.
Compensation Date Window	The effective dates for the compensation errors section.

Table 2: Error Messages	
Job Level Errors	
Error Message in Column 5	Error Description
Planned FTE = 0	Planned FTE is 0 for an employee
Planned Fte > 1 on multiple empl records	Planned FTE is greater than one across multiple empl records

Compensation Errors	
Error Message in Column 5	Error Description
Action reason occurs more than once	Multiple CAT increases, same action reason
Identical action reason exists in the CAT and in HRS	Identical Action Reason exists in the CAT and in HRS (as of the effective date window you assign on the run control)
\$0 amount entered in comprate change field	\$0 comp change amount entered
Funding Edit Errors	
Error Message in Column 5	Error Description
Combo error for fields DEPTID/ FUND_CODE/ PROGRAM_CODE in group ORGEDIT.	The funding string combination for Department, Fund Code, and Program Code is not valid
Combo error for fields FUND_CODE/ PROJECT_ID in group FNDPRJ.	The funding string combination for Fund Code and Program Code is not valid
Combo error for fields PROJECT_ID/ FUND_CODE in group PRJ_FUND.	The funding string combination for Project ID and Fund Code is not valid
Funding Errors	
Error Message in Column 5	Error Description
No Funding Information Entered in the CAT	No funding has entered, salary will not add to summary totals
Total Funding Distribution Percent must equal to 100%	Funding distribution is greater or less than 100%
Funding split distribution percent is 0	On an individual funding split, Distribution Percentage, Budgeted FTE, or Budgeted Amount = 0

Table 3: Report Columns	
Column	Description
NAME	First and Last name pulled from HRS
EMPLOYEE ID	EmplID pulled from the CAT
EMPLOYEE RECORD NUMBER	Empl Record pulled from the CAT
HOME DEPT	Home Department from the CAT
EMPLOYEE CLASS	Employee Class pulled from the CAT
PAY BASIS	Pay Basis pulled from the CAT
POSITION NUMBER	Position number pulled from the CAT
JOB CODE	JobCode pulled from the CAT
TITLE	Job Title pulled from the CAT
PLANNED TITLE	Planned Title pulled from the CAT
PLANNED FTE (FROM CAT)	Planned FTE pulled from the CAT

HRS ACTION REASON	<p>For Compensation Errors, pull the action reason from HRS, that falls within the defined effective dated window, for which an identical action reason has been entered in the CAT.</p> <p>If multiple identical action reasons exist between the CAT and HRS, pull only the max effective dated/seq one from HRS.</p> <p>Note: If the error is not an HRS/CAT duplicate action reason error the field will appear blank</p>
HRS CHANGE AMOUNT	<p>For Compensation Errors, pull comprate change amount associated with the duplicate action reason from HRS (max effective dated/seq that falls within the defined effective dated window).</p> <p>If the error is not an HRS/CAT duplicate action reason error, this field will appear blank.</p>
CAT ACTION REASON	<p>For Compensation Errors, pull the action reason from the CAT for which a duplicate action reason exists either in HRS, or in the CAT (has been loaded via a spreadsheet upload process)</p> <p>For non-Compensation Errors, pull the first action reason from the CAT.</p>
CAT CHANGE AMOUT	<p>For Compensation Errors, pull the comprate change amount from the CAT associated with Increase 1 Action Reason (for which a duplicate action reason exists either in HRS, or in the CAT (has been loaded via a spreadsheet upload process)).</p> <p>For non-Compensation Errors, pull the comprate change amount associated with the first action reason from the CAT.</p>
TOTAL COMPRATE	Updated Compensation Rate pulled from the CAT
GL BUSINESS UNIT	Pull the GLBU from the account code in the CAT – funding string 1
FUND	Pull the Fund Code of this empl record from the account code in the CAT - funding string 1
DEPARTMENT ID	Pull the DeptID of this empl record from the account code in the CAT - funding string 1
PROGRAM	Pull the Program of this empl record from the account code in the CAT - funding string 1
PROJECT ID	Pull the ProjectID of this empl record from the account code in the CAT - funding string 1
DISTRIBUTION PERCENT	Pull distribution percentage of first funding split of empl record with error from the CAT- funding string 1
BUDGETED FTE	Pull budgeted FTE of first funding split of empl record with error from the CAT- funding string 1
FUNDING OK TO LOAD	OK to load to CAT