6.14 (b) - How to Run CAT Reports – HRS to CAT Compare Report

In order to accurately check for discrepancies, users should enter the first date of the upcoming fiscal year (ex: 7/1 for "A" pay basis employees, 8/19 for "C" pay basis employees) Please note that the start date for "C" basis changes from year to year.

Purpose and Overview

The HRS to CAT Comparison Report identifies employee records where key fields differ between the CAT and HRS, such as**: Business Unit/Department change, Position Number change, Compensation Rate change, Empl Class Change, Title Change, Job Code Change and FTE change**. This report also captures **terminations**. In order to capture all new hires, re-hires, transfers and any other staff missing from the CAT who are in HRS, you will need to run the Missing from CAT report. This report must be clear of errors prior to submission for Madison Budget Office budget checkout, except for Budget to HRS FTE differences and Planned Title to HRS Job Title differences.

When the HRS to CAT Job Data Feed is ON – This report is useful for capturing terminations and position number changes.

When the HRS to CAT Job Data Feed is OFF– This report is useful for capturing terminations, positon number changes, rate and title changes.

Process Inputs

- Effective Date
- Business Unit
- Division (Optional)
- Department (Optional)
- Employee Class

Process Outputs

- Excel document with a population that meet the run control criteria and have discrepancies between key fields in HRS and the CAT.

Procedure Steps

1. Navigate to **Workforce Administration > UW External HR Systems > Compensation Admin Tool > CAT Reports > HRS to CAT Compare Report**.
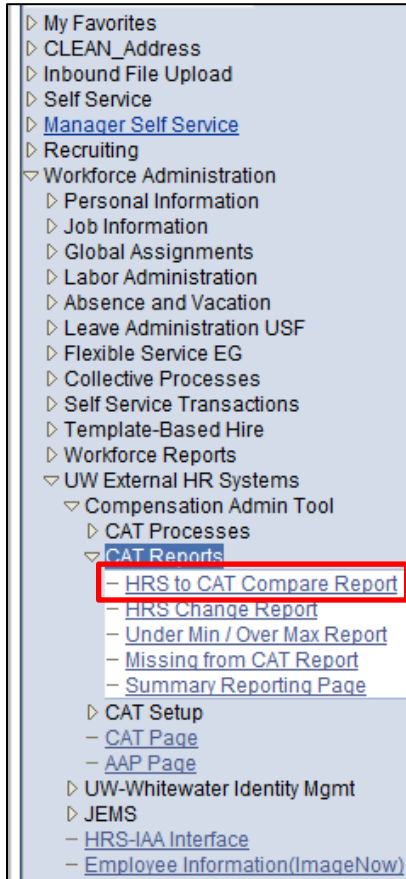
2. *Click Search under the Find an Existing Value tab to select a previously created Run Control ID, or create a new Run Control ID by selecting **Add a New Value**. To create a new Run Control ID, assign a unique identifier as the Run Control ID (eg. initials_date_etc.) into the Run Control ID box and 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.*

CAT HRS Compare Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▽ Search Criteria

Search by: Run Control ID begins with [HR_CAT_COMPARE]

☐ **Case Sensitive**

[Search] | Advanced Search

4. Enter parameters to define criteria for the HRS to CAT Compare 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 the **Effective Date** of the CAT you wish to compare against in HRS. This field will default to the current date. **In order to accurately check for discrepancies, users should enter the first date of the upcoming fiscal year.**
   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 to CAT Compare Report

Run Control ID: HR_CAT_COMPARE   Report Manager   Process Monitor   Run

HRS to CAT Compare Run Parameters

*Fiscal Year 2017

*Effective Date 07/01/2016

*Business Unit UWMSN

Division

Department

Employee Class

Employee Class - All Values: ☑

Select Values

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: 2:42:02PM   Reset to Current Date/Time
Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	CAT HRS Compare Report	UW_CAT_HRCM	Application Engine	Web ▼	TXT ▼	Distribution

OK   Cancel

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

HRS to CAT Compare Report

Run Control ID: HR_CAT_COMPARE   Report Manager   Process Monitor   Run

Process Instance:2084447

HRS to CAT Compare Run Parameters

*Fiscal Year 2017
*Effective Date 07/01/2016
*Business Unit UWMSN
Division
Department

Employee Class

Employee Class - All Values: ☑

Select Values

Save   Notify   Add   Update/Display

7. Click **Process Monitor** at the top right of the window.
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.

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 ◄ 1-3 of 3 ► Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	2082026		Application Engine	UW_CAT_HRCM	00699002	11/24/2015 2:42:02PM CST	Processing	N/A	Details

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

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

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:	1168704	Process Instance: 2082026	Message Log
Name:	UW_CAT_HRCM	Process Type:	Application Engine
Run Status:	Success		

CAT HRS Compare Report

Distribution Details

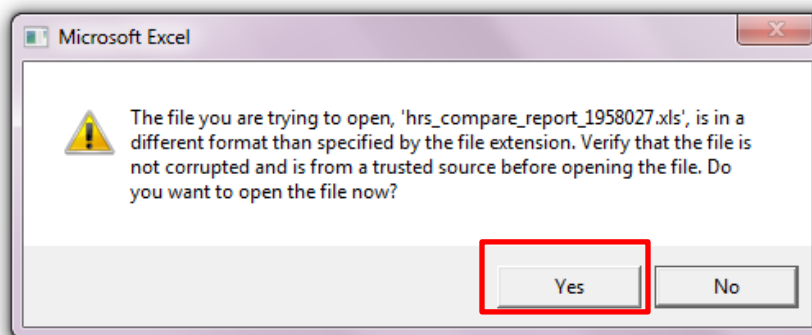Distribution Node: HRDEV_RPTNOD   Expiration Date: 11/23/2016

File List

Name	File Size (bytes)	Datetime Created
AE_UW_CAT_HRCM_2082026.AET	3,484	11/24/2015 2:47:49.811338PM CST
AE_UW_CAT_HRCM_2082026.log	530	11/24/2015 2:47:49.811338PM CST
AE_UW_CAT_HRCM_2082026.trc	205	11/24/2015 2:47:49.811338PM CST
HRS_Compare_Report_2082026.xls	258,190	11/24/2015 2:47:49.811338PM CST

Distribute To

Distribution ID Type	*Distribution ID
User	00699002

Return

a. 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.**

Microsoft Excel

⚠ The file you are trying to open, 'hrs_compare_report_1958027.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

Yes   No

b. Note that different internet browsers may have different opening processes.
2. Review the report.
   a. The report will appear as follows:
      i. One row per emplid/emplrcd combination is displayed.
      ii. If the two fields are the same between HRS and the CAT, they will appear blank.

iii.   If a change is due to a termination, only CAT columns will populate.

iv.   If a change is due to a hire, only HRS columns will populate.

HRS Compare Report							
Report Parameters:							
	Run Control ID:	Test02		**Process Instance:**	1959225		
	Run Date:	09/15/2015		**Run By:**	00833917		
	Effective Date:	08/24/2015		**Business Unit:**	UWEAU		
	Division:			**Employee Class:**	AS,CJ,CL,CP,ET1,ET2,ET3,ET4,FA,LI,OT1,OT2,OT3,OT4,OT5,OT6,SA1,SA2,SA3,SA4,SA5,SA6,SA7,SH		
	Department:						

PLANNED FISCAL YEAR	EMPLOYEE ID	EMPLOYEE RECORD NUMBER	NAME	CONTINUITY CODE	EXPECTED END DATE		CAT EMPLOYEE CLASS
2016	00029293	0	TIMOTHY MCMAHON	01			
2016	00060183	0	MONICA DELESTRY	01			
2016	00064513	0	MARCUS MC ELLISTREM	01			
2016	00070549	0	DOUGLAS FAULKNER	01			
2016	00085773	0	TERESA SANISLO	01			
2016	00102663	0	DOUGLAS DUNHAM	01			
2016	00120103	0	MAX GARLAND	01			
2016	00120861	0	ROBIN JOHENGEN	01			
2016	00124718	0	THOMAS CARLSON	02C	08/23/2015		

b.   A description of the different header fields of the output is displayed in Table 1 below.

c.   Action items based on the report output are presented 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 CAT you wish to compare against in HRS.
Effective Date	The effective date of the CAT you wish to compare against in HRS.
Division	The Division (if any) selected in the run control.
Department	The Department (if any) 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.
Business Unit	The Business Unit selected in the run control.
Employee Class	The employee classes included on the report's run control.
Report Columns	
Column	**Description**
PLANNED FISCAL YEAR	The upcoming fiscal year that is active in the CAT.
EMPLOYEE ID	The Employee ID of the employee record from HRS.

EMPLOYEE RECORD NUMBER	The Employee Record Number of the employee record from HRS.
NAME	The Name of the employee record from HRS.
CONTINUITY CODE	The Continuity Code of the employee record from HRS.
EXPECTED END DATE	The Expected Job End Date of the employee record from HRS if they have one.
CAT EMPLOYEE CLASS	The Employee Class of the employee record from CAT.
HRS EMPLOYEE CLASS	The Employee Class of the employee record from HRS.
CAT BUSINESS UNIT	The Business Unit of the employee record from CAT.
HRS BUSINESS UNIT	The Business Unit of the employee record from HRS.
CAT HOME DEPT	The Home Department of the employee record from CAT.
HRS HOME DEPT	The Home Department of the employee record from CAT.
CAT POSITION #	The Position Number of the employee record from CAT.
HRS POSITION #	The Position Number of the employee record from HRS.
CAT JOBCODE	The Job Code of the employee record from CAT.
HRS JOBCODE	The Job Code of the employee record from HRS.
CAT JOB TITLE	The Job Title of the employee record from CAT.
HRS JOB TITLE	The Job Title of the employee record from HRS.
CAT PAY BASIS	The Pay Basis of the employee record from CAT
HRS PAY BASIS	The Pay Basis of the employee record from HRS
CAT FTE	The FTE of the employee record from CAT
HRS FTE	The FTE of the employee record from HRS
CAT COMPRATE	The Comprate of the employee record from CAT
HRS COMPRATE	The Comprate of the employee record from HRS
EMPLOYEE TERMINATED?	Yes if the employee has been terminated (appears in CAT and not HRS) No if the employee has not been terminated (appears both in the CAT and HRS)

Table 2: Action Items based on HRS Feed Status		
HRS Feed Status	Job Changes in HRS that Occurred	Action Item
OFF	Employee Terminated	Delete from CAT
	Transfer/ Position # Change	Delete Previous Record and Add New Record to CAT
	Title Change	Review and Potentially Edit Planned Title Changes
	Comprate Change	Review and Potentially Edit Comp Changes
	New Hire	Potentially Add to CAT
	FTE, Expected Job End Date Change	Potentially Edit Planned FTE or Remove from CAT
ON	Employee Terminated	Delete from CAT
	Transfer/Position # Change	Delete Previous Record and Add New Record to CAT