STATE OF NORTH DAKOTA

INTRODUCTION TO
PEOPLESOFT NAVIGATION

VERSION 8.9

DISCLAIMER

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State of North Dakota

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WORKING WITH BROWSER-BASED APPLICATIONS

OVERVIEW

This section describes the basics for accessing and using PeopleSoft Human Capital Management (HCM) System Version 8.9.

OBJECTIVES

After completing this section, you will be able to:

1. Understand PeopleSoft 8.9 terminology.

2. Understand how to log into and navigate through your PeopleSoft application.

OVERVIEW AND APPLICATIONS

PeopleSoft is a table-driven database application designed to meet each organization's business processing and information needs. Sorting information into tables ensures data integrity and minimizes data redundancy. The tables are then organized into a relational database.

PeopleSoft is designed to integrate all Human Resource, Benefits, Payroll and Time & Labor applications. That is, the applications share the same relational data structure, data tables, user interfaces, reporting tools, and customization capabilities. PeopleSoft pages also display the same familiar table-driven and effective date-driven designs throughout its applications.

PeopleSoft offers a compliment of applications that cover most human resources needs. PeopleSoft Education and Government Human Resource Management System consists of the following applications (modules):

- Human Resources
- Benefits Administration
- Payroll
- Recruiting Solutions
- Training Administration

The State of North Dakota has also purchased the PeopleSoft Time and Labor module.

BROWSER BASED APPLICATIONS

In PeopleSoft Version 8.9, applications are in a purely internet environment. This new environment is called PeopleSoft Internet Architecture (PIA). PeopleSoft Internet Architecture is a server-centric architecture that requires the installation of only a web browser on individual user machines and you access PeopleSoft applications by logging into a standard web browser as you would if you wanted to open your favorite website.

SIGNING INTO YOUR SYSTEM

1. **Open** your Internet web browser – Explorer.
2. Enter http://www.state.nd.us/connectnd.html in the URL address box.
3. Press "enter."
4. You may then choose the appropriate environment.

The PeopleSoft sign-in page will appear:

5. Enter your **User ID** and **Password.**

Your User ID and Password are case sensitive. Passwords always appear as asterisks in the display as you type them. For your specific User ID and Password refer to your classroom instructor.

6. Click on the **Sign In** button.

The PeopleSoft online system will validate your User ID and Password. If, one is invalid, the system will display an error message below the Sign In button. You'll need to reenter both the User ID and Password.

INTERNET ARCHITECTURE TERMINOLOGY

There are some basic terms used throughout the PeopleSoft Internet Architecture. Prior to using you application you will need to become familiar with these terms.

Navigation Header	The header area in PeopleSoft Internet Architecture will remain static as you navigate through your pages. The navigation header contains: link back to your Homepage, link to add to favorites, help button, and a Sign-out button.
Breadcrumbs	A small horizontal menu of links. This creates a visual path for where you currently are in the system. You can click on any part of the Breadcrumb path to return to a previous location.
Menu Pagelet	Represent functional categories, such as: Workforce Administration.
DFAN Pages	A DFAN Page is a collection of categories and links to the right of the main menu navigation. These links enable a user to navigate to a page with a minimal number of clicks.
CFAN Pages	CFAN Pages are alternate categorizations of navigational items that are made available to improve the user experience.
Components	Components are associated with menu items that allow you to perform specific actions. These can contain single or multiple pages.
Pages	Are windows into your data tables? Users are authorized through security to perform various actions within each page.

Navigation Header

Menu Pagelet   **DFAN Pages**   **Components**

Page

NAVIGATING THROUGH PEOPLESOFT

Now that you have learned the navigational terms, let's take a minute to review them.

- Navigation Header
- Breadcrumbs
- Menu Pagelet
- DFAN Pages
- CFAN Pages
- Components
- Page

USING MENU NAVIGATION

PeopleSoft's browser-based interface provides an intuitive way of updating or viewing data in your database. Menu navigation consists of a hierarchy of folders and content references. Expanding and collapsing folders are the primary means of getting around your PeopleSoft application. The navigation header remains constant, containing links to Home and to Signoff.

The main level, also known as *Home*, contains a general list of the areas you can link to in that application. From this point you can expand any folder to access additional folders or content references that open transaction pages.

An arrow ▷ before a listing indicates that there are sub-levels to view under that heading. Click the arrow or the heading name to view the sub-levels. An arrow ▽ before a listing indicates that the heading is already expanded to show its sub-levels.

EXPANDING AND COLLAPSING MENU NAVIGATION

Starting from the 'Home' position. Let's use the PeopleSoft navigation with the arrow signs to view an employee personal information record.

- Click the arrow or the heading name next to it, to expand the first column of Workforce Administration.

- You may then click on Personal Information on the left hand menu, in the DFAN menu on the right, or click on Modify a Person in the DFAN menu on the right.
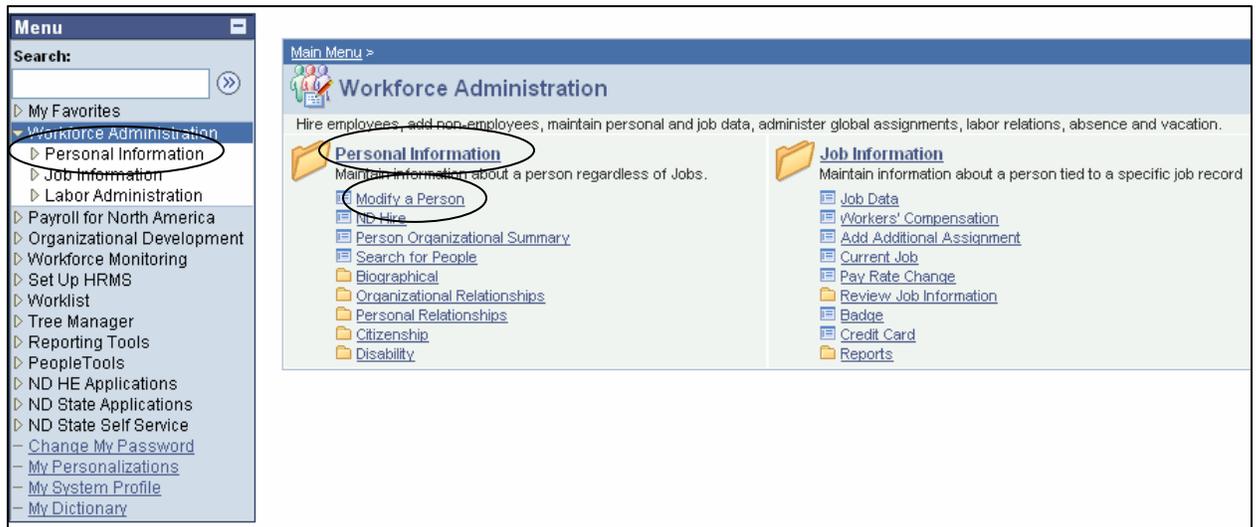
SEARCH PARAMETERS

To find existing data, you must use a search dialog box. In our example – Finding an employee's Personal information, continue with the next step.

1. Click on the link **Modify a Person** and the following search dialog box will appear:

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

Find an Existing Value

EmplID:	begins with	
Name:	begins with	
Last Name:	begins with	
Second Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	

☐ Include History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Typically, you will have various field values that complete a search. Values you enter identify the data rows you want to display on the selected page. The more fields or characters you enter, the more specific your search results. How to enter search information is discussed in greater detail in section "Using Keys and Search Pages.

2. Enter the Employee ID in the EmplID box.

Congratulations! You are now in an employee's Personal Information Component consisting of 3 pages: Biographical Details, Contact Information, and Regional.

COMPONENTS

Components consist of several pages within the same window. Usually these are *pages that are related* and *need to be completed together*.

As you finish with one page, click the folder tab of the next page to open it. In addition to clicking folder tabs, you can also click the links at the bottom of each page in the component to move to the next page.

Contact Information →

Component Page Links →

All pages in a group have the same search record so the prompt in the initial search dialog box is the same regardless of which page you access first—and you won't be prompted to enter new search criteria as you move from page to page in the component.

Pages in a group are treated as a single entity when you try to save data. When you click the save button, data on all the pages is committed to the database.

When saving, you may be prompted to enter data in required fields, if the system has not prompted you to do so already.
Occasionally you will see pages that, in addition to having links to other pages in the component, have links to related components or pages. The component shown below, for example, contains three related links at the bottom of the page.

You may click any one of these links to access that page or component for the employee record you currently have open. This convenience allows you to move easily to related transactions to enter data without going through the search process again.

We will use the employee Job Record as an example.

Related Component Page Links

Note: Job Data is not highlighted as a link. This is because Job Data is the component that you are currently in. Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation are all a part of the Job Data component. When you click a component link, you'll notice that the new transaction contains the same component links, enabling you to return to the original transaction if desired.

NAVIGATING TO ANOTHER PAGE

There are essentially two ways you can navigate to a new page.

- One – you can stay within the same window and follow the menu links or breadcrumbs as we just learned.
- Two, open a New Window.

At the *top of all pages* you may notice the **New Window** hyperlink. Clicking this link will open a new browser window, or child window, showing the menu navigation to your current position.

From this point you can open a new transaction to view or enter new data. You may open any number of child windows as necessary.

OPEN A NEW WINDOW

Let's take a few minutes and review the Related Components Link feature. Open a new window and navigate to the Job Data record.

Navigation:
Main Menu > Workforce Administration > Job Information > Job Data

Click on the Related Component Page Links *(Employment Data, Earnings Distribution and Benefits Program Participation)* to view the results.

There are certain rules of thumb to keep in mind when using PeopleSoft's New Window feature:

Before opening a new window, save any changes made in the current window. If the session times out while you are working in a new window, you may lose any unsaved changes.

After a certain length of inactivity in one of the child windows, your new window session will timeout or expire. This does not invalidate your other current windows, but simply means this expired window is no longer useable. Any unsaved changes will be lost.

TOOLBAR & BUTTONS ON A PAGE

At the bottom of most pages you'll find the toolbar, which changes depending on the type of page you are in. The toolbar may include search list navigation buttons, page navigation buttons, and page action buttons. The toolbar changes depending on the type of page that's active. Not all buttons shown below will display on every page. Likewise, some buttons may be grayed out, indicating this action is not available to you at that time.

| 📋 Save | 🔍 Return to Search | ✉ Notify | ⬅ Previous tab | ➡ Next tab | 🔄 Refresh | | 📄 Update/Display | 📄 Include History |

> If a gray button appears on your page,
> that action is not available to you.
>
> 📄 Update/Display

📋 Save	Sends the information you've entered on the page to the database. You'll generally save when you come to the end of a component. The Save command always updates the data for all pages in a group. Upon save, the system displays the "Saved" message in the upper right corner of the page.
🔍 Return to Search	Returns you to the search page
⬇ Next in List	Displays the data for the next data row in your search results grid. This button appears gray if you didn't select the data row from a search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.
⬆ Previous in List	Displays the data for the previous data row in your search results grid. This button appears gray if you didn't select the data row from the search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.
➡ Next tab	Displays the next page in the current component. If you are in the last page of the component, this button is gray.

⬅ Previous tab	Displays the previous page in the current component. If you're in the first page of the component, this button is gray.
Update/Display	Accesses existing rows of data on the database. If data is effective-dated, displays only current and future rows.
Include History	Displays all rows of data: current, future, and history.
Refresh	Appears for expert users only that are in Expert Entry mode. When clicked, validates the data entered in certain fields.
+...	Inserts a new row.
−	Deletes a row.
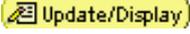
DATA ENTRY: FIELD FORMATS

Upper vs. Lower Case
Many data fields are case sensitive. It is important that the information is entered using proper capitalization. PeopleSoft does not convert data to one case or the other unless the field requires the entry to be all capitalized, i.e. State. In these cases, the system will automatically convert the entry to the correct format.

Names
Names are stored in the PeopleSoft database in the following format: First name (space with no punctuation) Last name. When hiring a new employee in PeopleSoft 8.9 the name format will automatically populate in the Name field on the Personal Data page after the employees First Name and Last Name fields have been entered.

Dates
Type dates as MMDDYY. PeopleSoft will enter the slashes and fill the year to four places after pressing Tab, i.e. 020199 becomes 02/01/1999. If the year being entered is 1950 or before, the system will automatically format the year as 2000 i.e. May 5, 2030 entered as 050530 = 05/05/2030. If the year being entered is from 51 to 99 the system will automatically format the year as 1900. i.e. May 5, 1968 entered as 050568 = May 5, 1968.

Dollar Amounts
Type in the dollars with the decimals if there are cents to be keyed. The system will automatically insert commas for long numbers.

Social Security Numbers
Type SSN numbers as # # # # # # # # #. PeopleSoft will insert the dashes after pressing the Tab key. i.e. 123456789 becomes 123-45-6789.

Zip Codes
Type zip codes as either five or nine digit numbers. PeopleSoft will insert the dash after pressing the Tab key. i.e. 981011015 becomes 98101-1015.

Phone Numbers
Type phone numbers with ten digits (area code + phone number). PeopleSoft will insert a slash and a dash after pressing the Tab key. i.e. 2062961000 becomes 206/296-1000.

USING KEYS AND SEARCH PAGES

OVERVIEW
This section describes keys and search pages.

OBJECTIVES
After completing this section, you will be able to:

- Understand the definition of keys and search pages.
- Understand how to use keys and search pages.

KEYS AND SEARCH PAGES

A field, or a combination of fields, uniquely identifies every table in the PeopleSoft database. For example, the **Employee ID** field uniquely identifies employee records.

The display-only fields that uniquely identify data are **keys**. To display a page, you'll enter the keys to search for on the Search page so that the system can retrieve the correct row of data. For instance, if you want to retrieve the Personal Data page for Jim Smith, you must specify the key data in the search record for that employee.

A search record is the list of defined search keys that help you locate data. These are the fields you are prompted for on a search page. Every transaction page, or component listed in the menu columns, has a search record associated with it. If you select other pages that have a common search record, such as pages within a component or an associated link, you will not be prompted to enter search criteria again. You'll be prompted for new search keys only when you select a new page outside of the component with a different search record.

SEARCH BUTTONS

The following search related buttons are located on Search pages of all types.

Search	Processes the search once you have entered search criteria in the key fields above the Search button.
Clear	Clears entered text from all fields on the page so you can enter new criteria.

SEARCH PAGES

There are two types of search pages: the basic search page and the advanced search page. When you select a page to navigate to, the system will often display an advanced search page, such as the Personal Information page shown below. The advanced search page generally offers several keys by which you may search for your record. It allows you to narrow down your search by entering in more than one type of criteria. The Personal Information advanced search page below contains seven fields starting with the EmplID (Employee ID) field.

Navigation
Main Menu > Workforce Administration > Personal Information > Modify a Person

Click the blue **Basic Search** hyperlink.

If the search page offers a basic search option, it will appear as a link next to the search action buttons. In general, a basic search page offers just one or two fields by which you may perform your search. However, you may designate which key field you would like to search by from the **Search By** drop-down list box.

Click on the drop-down arrow of the **Search By** field:

INCLUDE HISTORY & CORRECT HISTORY

<div style="background:yellow;color:red;font-weight:bold;text-align:center">
Correct History
Mode used by
OMB only
</div>

Many search pages, both the advanced and the basic, contain the **Include History** box as a page action option. You can select this type of action you before retrieving that record by selecting the appropriate check box. Or, if you are unsure, you may leave the check box clear. You will again have an opportunity to select the page action once you open the page you are searching for.

Personal Information

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

Find an Existing Value

EmpIID:	begins with ▾	
Name:	begins with ▾	
Last Name:	begins with ▾	
Second Name:	begins with ▾	
Alternate Character Name:	begins with ▾	
Middle Name:	begins with ▾	

☐ Include History ☐ Case Sensitive

Search   Clear   Basic Search Save Search Criteria

Include History

Include History	Includes future, current, and historical dated rows.

ENTERING SEARCH CRITERIA

You can enter a full or partial value for any key field. Based on what you enter in the dialog box, the system uses the search record to present you with a list of possible matches, or if there is only one match, the page you requested. Often, however, you don't have all the information you need. For example, if you are searching for all employees that have a last name of Smith, you can enter their last name and click the Search button.

Navigation:
Main Menu > Workforce Administration > Personal Information > Modify a Person

Enter an employee's last name in the "Last Name" field.

The system will display employees with the last name entered in the Search Results grid. You may be able to determine which employee is the correct one based on the additional information displayed in the Search Results grid. To access the employee's data, click any of the underlined hyperlinks in the Search Results grid.

First Name   Last Name

If you are not sure how to spell an employee's name you can enter the first letter of the last name and the system will return a list of all employees with the last name that begins with the letter you entered.

Clear Smith from the "Last Name" field by clicking on the clear button.

Enter S in the "Last Name" field

The system returns all employees whose last name begins with an "S".

That logic works for the Emp ID and Department Number fields. You do not need to know the exact ID or Department number.

The search function will display up to 300 retrieved entries from the database in the Search Results list. Use your browser's scroll bar to view all listings on the current page. If the list is subdivided, click the right-pointing arrow above the grid, ▶ or press Alt (+) to view the next set of listings.

If your search retrieves more than the maximum 300 listings, the Search Results will indicate 1-100 of 300, as shown below. You should then attempt to narrow your search in another way, if you are not able to retrieve the data you need on the first attempt.

Personal Information

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

Find an Existing Value

EmplID:	begins with ▾	
Name:	begins with ▾	
Last Name:	begins with ▾	SMITH
Second Name:	begins with ▾	
Alternate Character Name:	begins with ▾	
Middle Name:	begins with ▾	

☐ Include History   ☐ Case Sensitive

[Search] [Clear]   Basic Search 🖫 Save Search Criteria

Search Results

View All   First ◀ 1-4 of 4 ▶ Last

EmplID	Name	Last Name	Second Name	Alternate Character Name	Middle Name
7009131	Sandra Smith	SMITH	(blank)	(blank)	(blank)
7009132	Doris Smith	SMITH	(blank)	(blank)	(blank)
7009678	Joni Smith	SMITH	(blank)	(blank)	(blank)
7010967	Mary Smith	SMITH	(blank)	(blank)	(blank)

Note: To display all the records that have been retrieved you can click on the View All link.

From these search results, a single click on any column in a row retrieves the employee's Personal Data record with the latest information on that employee.

WORKING WITH PAGES

OVERVIEW

This section describes the various parts of Pages and how to use Pages to enter and store data.

OBJECTIVES

After completing this section, you will be able to:

- Use Pages to enter and store data effectively and efficiently in your PeopleSoft system.

- Understand effective dated row logic.

OVERVIEW

Pages are the primary graphical interface (window) by which you view and alter data in the PeopleSoft system. Pages are representations of rows of data in the database tables. They are used to view, enter, and update data stored in application tables. Each page display also provides features in the form of buttons, or links to help you navigate through the system. As you make changes, or add to the database, you'll need to be familiar with effective-dating logic, as well as the various page action options used with historical, current, and future data.

It will also be helpful if you familiarize yourself with the types of page elements you will encounter on pages and how they work. There are many different types of elements to organize information on pages that enable you to enter data, including aesthetic elements, data-entry elements, and functional or data processing elements.

If at anytime you have a question while working on a page, press the Help button in the navigation header. This action will open PeopleBooks that explains the particular page in which you are currently working.

EFFECTIVE DATING LOGIC

When you update existing information, you do not want to lose or overwrite the data already stored in the system. To retain history, you can add a new data row identified by the date when the information goes into effect: *an effective date*. An effective date is a date listed in the column of a table that is a key, but it is not a search key.

PeopleSoft's effective-dating logic enables you to maintain an accurate history of information in the database. Effective dating allows you to store current data, historical data (changes in your data over time), and future data in tables.

The PeopleSoft system categorizes effective-dated rows into the following basic types:

Future	Data rows that have effective dates greater than the system date. There can be more than one row.
Current	The data row with the most recent effective date less than or equal to the system date. Only one row is the current row.
History	Data rows that have effective dates less than the effective date of the current data row. There can be more than one row.

CENTURY DATES

When you enter a two-digit year in a date field, PeopleSoft sets the century to '20' if the year entered is less that 50. Otherwise, it sets the century to '19' for years 51 or greater.

Century defaults to 2000	For dates ranging 0-50
Century defaults to 1900	For dates ranging 51 +

For example: 011560 in the date field would translate to January 15, 1960 – 01/15/1960. While 011549 in the date field would translate to January 15, 2049 – 01/15/2049.

PAGE ACTION TYPES

PeopleSoft has four general options that you can use within the system when accessing information. Based on the user and their level of security, not all of the four options may be available.
The action you select tells the system the type of activity (action) you want to perform in the database.

Search Dialog Box	Buttons Displayed on a Page	Action
Add a New Value	E+Add	Add actions add a new row of information to the database with a new high-level, primary key. Example found under the Setup Menu Item list.
Default Value	Update/Display	**The default when you enter a page is Update/Display. Displays current and future rows of data.** To update information, insert a new row of data by using the Insert Row button.
☐ Include History	Include History	This action works is similar to Update/Display, except it includes viewing history data row.
☐ Correct History	Correct History	Correct History is the most powerful of the action types. When you choose this option, you can view, change, and insert rows of data regardless of the effective date. If you need something changed using correct history please contact OMB to perform this action for you.

Note: When you insert a new row into an effective-dated table, the existing information is copied over into the new row and identified by the system date – usually today's date. Simply change the data and enter the date on which you want the change to go into effect.

The Update/Display and Include History page action buttons are located in the toolbar at the bottom right of each page on which they are applicable. You can toggle between these buttons by clicking on the desired action button. A grayed out button indicates the page is currently in that mode. Notice the page below is currently in Update/Display mode.

DATA ENTRY FIELDS

On pages, you'll see several types of data-entry fields, each designed to offer different ways to enter and maintain information. The different kinds of data-entry fields serve a common purpose—to provide a simple way to enter and update data in the tables. You'll type data directly into some fields, such as edit boxes and long edit boxes. Other data-entry fields (such as radio buttons and drop-down list boxes) present you with a list of choices. Understanding how to use each type of data-entry element will help you use the system more efficiently.

Data-entry elements, which are always associated with specific database fields, include the following:

Check Box	Small, square box that enables or disables an option. Typically, you *select* the check box by clicking within it; this adds a check mark and the option becomes enabled. Click it again to *clear* the check box and the option is disabled.
Drop-down list box	Rectangular box similar to an edit box with a prompt button within the box. Clicking the prompt button expands the box to display a list of valid values from which you can select a single option.
Edit Box	Rectangular box into which you enter data. The size of the edit box—the number of characters you can enter—is determined by the length of the database field. Edit boxes for fields with prompt tables have a prompt button to the right.
Grid	Entry fields arranged like a spreadsheet with a navigation bar or footer and (Add) and/or (Delete) buttons for each row.
Long Edit Box	Long rectangular box into which you enter long text items such as comments.
Radio Button	Small round button that represents one option in a group of mutually exclusive options. Only one radio button in a group can be selected at one time (by clicking it).
Scroll Areas	An area where entry fields are arranged in a framed area with a navigation bar or footer. Each row of data may contain (Add) and/or (Delete) buttons.

TABBING

To move among the data-entry fields on a page, press the Tab key or click once on the field. The Tab key moves you one field at a time in a sequence determined in the page definition. Tabbing will also rest on prompts to give you the option of viewing the prompt table or calendar. To open a prompt or calendar you can press the Enter key. Or, to get to the next field press the Tab key again. Shift+Tab moves you back, rather than forward.

REQUIRED FIELDS

In most applications, an asterisk next to a data-entry field on a page indicates it's a required field. Unless deferred processing has been set for this page, data must be entered in that field if you want to continue on to the next field, or to save the page. If you save the page before entering data, the field will turn red and an error message dialog will display on your page. Click 'OK' on the error message and enter the correct data in that field. Required fields are often drop-down lists or are accompanied by a prompt button to assist you in entering the correct data. Make use of these prompts to help you find the correct data.

WORKING WITH REPORTS

OVERVIEW

This chapter describes how to run and view reports through the process monitor and report manager.

OBJECTIVES

After completing this section, you will be able to:

- Run Reports.
- Review Reports through the Process Monitor.
- Review Reports through the Report Manager.

RUNNING STANDARD REPORTS

In your day-to-day work, you run reports much more frequently than you define reports. Reports are generally predefined by others, such as: PeopleSoft, department managers, or the technical department. However, they can even be designed you.

Although much of your interaction with the PeopleSoft system involves working with the online pages of a PeopleSoft application, you'll also execute off-line, or batch, processes that run in the background while you are still using the application or even after you've left the office.

An off-line, or batch, process is a predefined process or program that runs independent of any end user intervention. Some typical, off-line processes are payroll, journal posting, complex mathematical calculations, or generating reports that you share with colleagues.

You run off-line (batch) processes in the PeopleSoft system using Process Scheduler Manager. Process Scheduler Manager allows your organization to define processes, submit requests for processes, and set up an "agent" that scans for submitted processes and runs them.

As an end-user you'll only need to be concerned with successfully submitting process requests, monitoring their progress, and viewing their output in Report Manager. You can safely leave Process Definitions and configuring the Process Scheduler Server Agent for the technical staff at your site.

In this chapter, we cover the general procedure for running the standard reports that come with your PeopleSoft applications. If you (or someone in your organization) have added custom reports to the system, the procedure should be similar to the one we describe.

The following sections briefly introduce you to the fundamentals of submitting, monitoring, and viewing your reports. We cover the following topics:

- Requesting Reports in PeopleSoft Applications
- Running Reports using the Process Scheduler
- Checking the Status of a Report
- Viewing Report Results

> **Note:** The procedure described in this chapter applies to most standard reports, but not all of them. Some PeopleSoft applications include reports that you run from outside the system, using PS/nVision or a third-party application. The documentation for your application tells you which application to use.

REQUESTING REPORTS IN PEOPLESOFT APPLICATIONS

To begin the reporting process, use the following navigational path: *Main Menu > Workforce Administration > Job Information > Reports > Personnel Actions History.*   Most of the reports that will be run by agencies are at the following navigation: *Main Menu > ND State Applications > Reports.*

The Report Menu List will display several delivered reports that are available through PeopleSoft. For our example we are going to use the Personnel Actions History report.

When you select a report from a menu, you will be prompted for a **Run Control ID**. Each run control you create receives a unique Run Control ID. You may use any value for a Run Control ID. If there is not a predefined Run Control ID, you can create one by clicking on the Add a New Value hyperlink.

Personnel Actions History
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

Run Control ID: begins with ▼ [_____]

☐ Case Sensitive

[Search] [Clear]   Basic Search 💾 Save Search Criteria

Find an Existing Value | Add a New Value

Click on the Add a New Value hyperlink and enter a value for your **Run Control ID**. This value can be used as often as you like. Click the ▭Add▭ button.

You are now ready to run your report through the Process Scheduler.

RUNNING REPORTS USING THE PROCESS SCHEDULER

The following page will appear after you have added your Run Control ID.

Follow the directions below to run your report on the process scheduler.
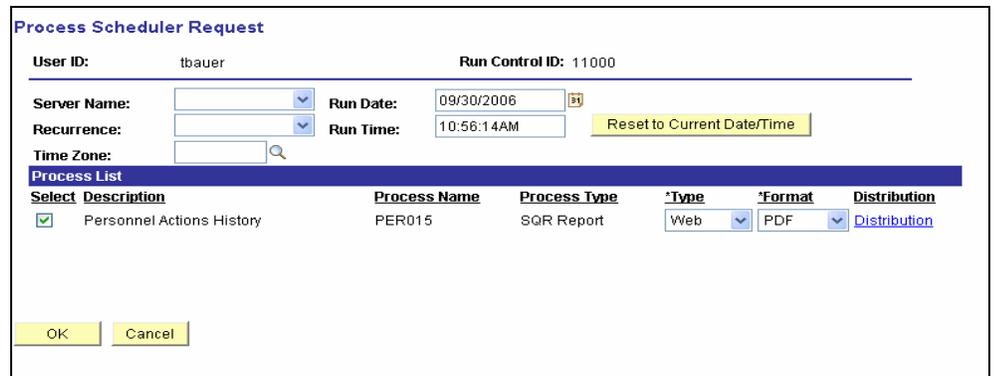
1. Fill in any parameters that are being requested. The ones used for this report are as follows:

    > **Language** – *English*
    > **From Date** – *January 1, 2006*
    > **End Date** – *Current Date*
    > **Actions** – *Hire*

    This will produce a report of all employees hired during the 2006 calendar year.

2. Click on the Run button.

The **Process Scheduler Request** page will appear:

Process Scheduler Request							
User ID: tbauer			**Run Control ID:** 11000				

Server Name:			**Run Date:**	09/30/2006			
Recurrence:			**Run Time:**	10:56:14AM	Reset to Current Date/Time		
Time Zone:							

Process List

Select	**Description**	**Process Name**	**Process Type**	***Type**	***Format**	**Distribution**
☑	Personnel Actions History	PER015	SQR Report	Web	PDF	Distribution

OK   Cancel

3. Enter *PSNT* in the **Server Name** field. This is where your process is going to run.

4. The **Type** and **Format** fields will default to the values set for the delivered report. These values can be changed from this page. *Web* and *PDF* are the most commonly used values.

5. Click the OK button to continue, or the Cancel button to cancel the process.

6. The word *Processing* will appear in the top right-hand corner while processing. The word *Save* will briefly appear when done.

You are now ready to check the status of your report.

CHECK THE STATUS OF A REPORT

After you click the [OK] button on the previous page, you will return to the page listed below.

Click on the Process Monitor hyperlink. This will take you to the **Process List** page. The Process List page will display the Instance Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status and Details.

Instance Sequence	The order that your request is being processed.
Process Type	The process type that is being requested. Examples: SQR Report, Crystal, COBOL, Application Engine.
Process Name	The technical name for the report.
User	The User ID running the report.
Run Date/Time	The Date and Time of processed.
Run Status	The status of the report: Queued, Initiated, Processing, Posted, and Success.
Distribution Status	When the Trace/Message Log is available.
Details	Link to view run logs and report results.
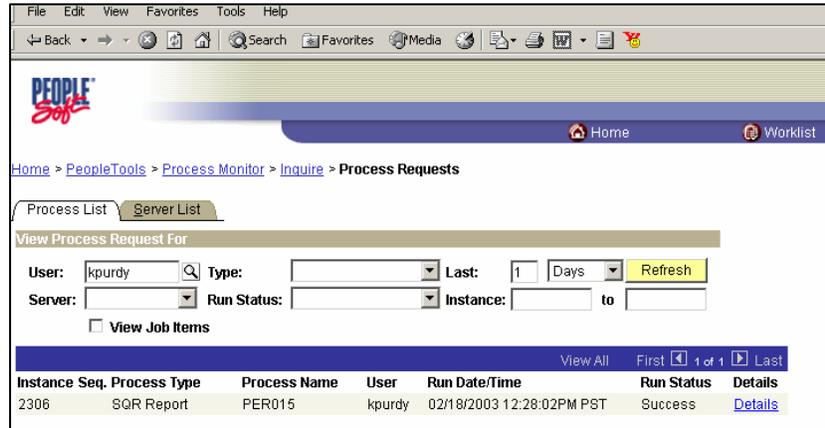
Queued	Report is waiting to start processing.
Initiated	Report has begun processing.
Processing	Report is processing.
Posted	Report is posted in the Report Manager.
Success	Report has completed successfully.
Error	Report did not complete successfully.

Depending on how much data you ask the system to retrieve, and depending on the system's current processing load, your report might take only a few moments or considerably longer to run, therefore you may not always see all of the processing stages.

Your user ID appears in the **User** field. You can use the navigation arrows on the screen to scroll through the list. Use the **Server, Type, Run Status, Last,** and **Instance** list boxes to limit the processes that Process Monitor displays.

Click ⬚ Refresh to update this page with the latest system activity. If the **Run Status** column says *Initiated* or *Processing*, the report is still running. When it says *Success*, the system has finished running the report.

After you have received a run status of *Success* and a Distribution Status of *Posted*, click on the Details hyperlink and the following page will appear:

From this page you can view the Parameters that you requested your process from, any message logs and the actual report results.

VIEWING REPORT RESULTS

The following instructions will allow you to view the results of your report.

1. Click on the <u>View Log/Trace</u> hyperlink and the **Report Log Viewer** page will appear.

2. Click on the **.PDF** file to view your report. To view file with the .PDF format you must have Adobe Acrobat Reader loaded on your system.

Note: The PER015 – is the Process Name that we requested earlier. The Message Log will display error messages for runs that were not successful. The Trace File is used by technical staff.

COMMONLY USED ACROBAT BUTTONS
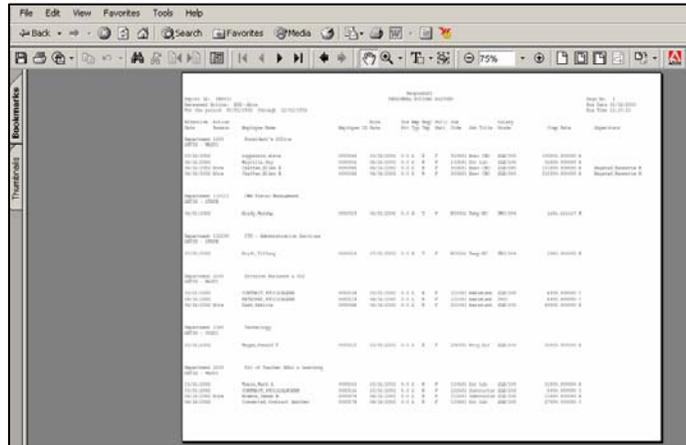
💾	Save to a file
🖨	Send report to the printer
🔍	Zoom In for larger view
⊖	Zoom out for small view
◀ ◀ ▶ ▶	Navigate through pages
📄	Page actual size
📑	Page fit in window

VIEWING PREVIOUS REPORTS

To check the status of your report, or view previously ran reports, you can navigate to: *Main Menu > PeopleTools > Process Scheduler > Process Monitor.* Change the number of days to how many days you need to go back and hit **Refresh**, all reports ran for that time period will show up.

CANCELING OR HOLDING REPORT REQUESTS

Depending on the status of your report, you can cancel it or put it on hold. If the system is done processing a report, you can delete its information from Process Monitor. Click **Details** to display the options for canceling or holding a request.

EMAILING THE REPORT

Choose type of *Email* and *HTM* when you are initially running the report.

Note: If you are entering a list of email addresses, make sure to use a *semicolon* to separate each address from the others.

You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper Setting Report Distribution. The **Distribution Detail** page allows you to choose the recipients of your process output. To set up distribution for your process output, click on the **Distribution** hyperlink.

If the process that you are running allows output that can be emailed, you can enter an email subject and message and send the output to a group of email addresses with security to view this output.

Note: You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper security to view this output.

You can also run the report as a .PDF file and email it. The formatting on the .PDF file is much easier to read.

WORKING WITH QUERY

VIEWING AN EXISTING QUERY

Navigate:
Main Menu > Reporting Tools > Query > Query Viewer

Click on the **'Search'** button for a list of available queries if you do not know the name of the query you are going to run. You can also narrow your search by enter the first few letters.

The query name will appear in the 'Search Results' as shown below:

Note: You can also enter the name of the Query in the search box.

You may click on the 'HTML' link to show the results of the query on your screen. If you would like the query results to appear in a spreadsheet click on the 'Excel' link.

The following screen shows the results for clicking on 'HTML'.

Some queries will have prompt boxes that must be completed before the query will run successfully. After you have completed all of the prompt fields, click on 'View Results'.

NDS_PR165_DEDUCTIONS

Business Unit: 11000 🔍
On Cycle Pay Period End Date: 07/31/2006
Off Cycle Pay Period End Date: 07/30/2006

[View Results]

Download results in : Excel SpreadSheet CSV Text File (153 kb)

View All   First ◄ 1-100 of 520 ► Last

	Group	Unit	DeptID	Pay Period End Date	ID	Name	Deductn Cd	Ded Class	Descr	Curr Dedn
1	PG1	11000	110150	07/31/2006			P10101	N	Dakota Plan EPO	553.94
2	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
3	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
4	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
5	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
6	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
7	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
8	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
9	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
10	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
11	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
12	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
13	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
14	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
15	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
16	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
17	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
18	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94

Note: If once you view the results of the query you would prefer to see the results in an Excel Spreadsheet, you may click on the link 'Excel Spreadsheet' to do this.