



HCM

Human Capital Management

Workshop Summary—Part 2



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

ELEVATE

Contents:

Summarized content from the following workshops:



HCM Transactions



Paying People



Reports



HCM

Human Capital Management

Transactions



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Review: Transaction Pages and Approvals

Transaction pages



- Multiple changes on single transaction page.
- Submitted changes are routed for approval.
- Tables are updated after approval.

- Review, reject, or approve requests.
- Eliminates paper and email-based approvals.

Approval Workflows





Managers and HCM Dept. Users

Higher Level Approver HR Office Approval

Update Job Data



Job Data

Update Position Data

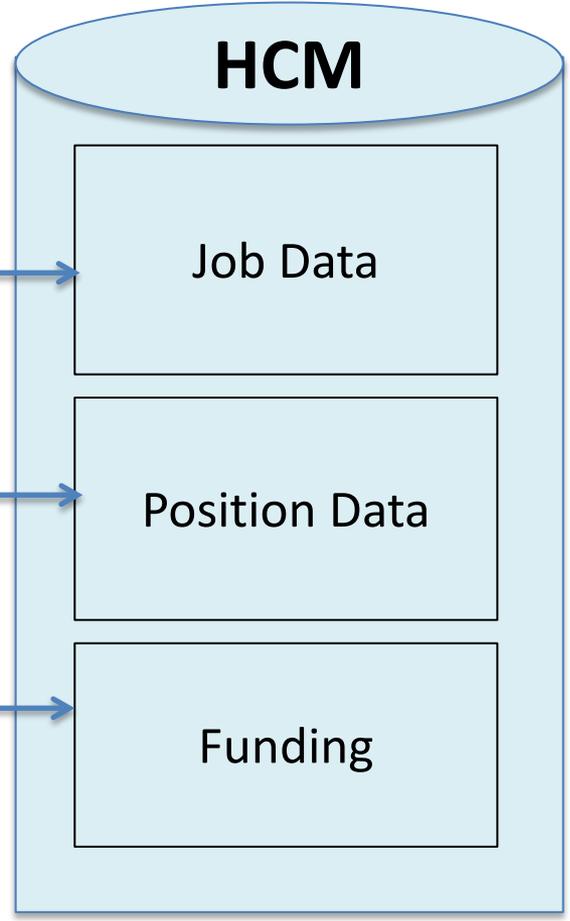


Position Data

Update Funding



Funding





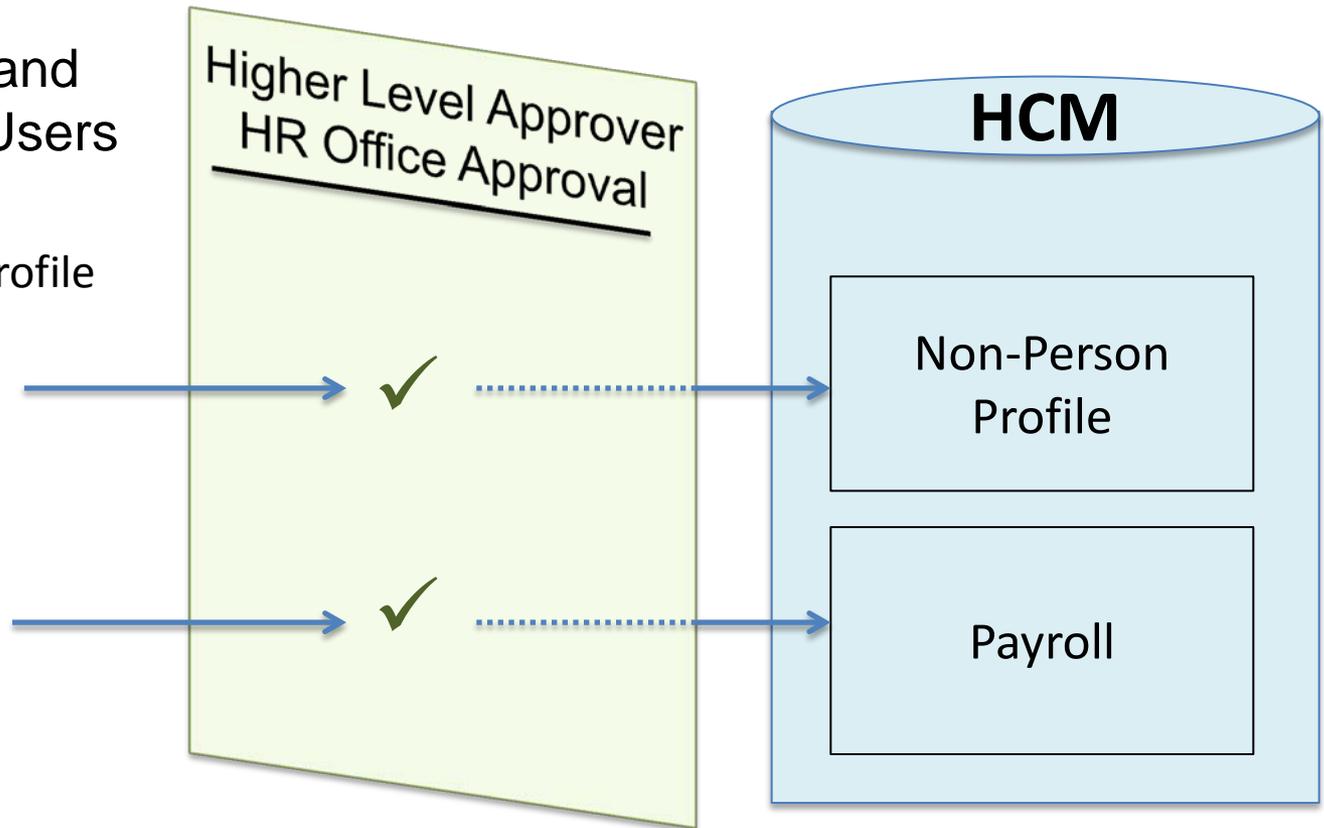
Managers and HCM Dept. Users

Update Non-Person Profile Data

- Job Description
- Competencies
- Required Training

Update Time

- Corrections
- One-Time Pays



Example of Transaction Page—Position Change

Collaborate Attach New Window | Help |

Create ePAR Position Request

Step 3 of 4: ePAR Position - Change

Transaction Details

| | | | | | |
|--------------|----------|-----------------|-------------------|--------------------|---------------------|
| PAR Action: | Position | Action: | Position Change | Document ID: | ePAR Position |
| Request ID: | | Person Code: | Department Change | Document Instance: | 0 |
| ePAR Status: | | Effective Date: | 06/15/2015 | Document Status: | Initial / Add Entry |
| | | Effective Seq: | 0 | | |

Position Details

Position Data

Job Information

Work Information

| | Current Value | | New Value | |
|-----------------------|---------------|-------------------------------|----------------|-------------------------|
| Department: | 51000 | Employee Services | 52000 | Employee Services |
| Company: | CU | University of Colorado | CU | University of Colorado |
| Location: | 5UCA | Office of the President | 5UCA | Office of the President |
| Reports To: | 00706444 | Business Services Senior Prof | 00[REDACTED]44 | [REDACTED] |
| Appointing Authority: | | | | |

Annotations:

- Expand and collapse sections (points to Transaction Details)
- See Current Value (points to Current Value column)
- Fields for data users can change (points to New Value column)

Example of Workflow Progression

Instance ID: 239 Document State: Initial
 Document: ePAR Additional Pay Sub State: Ready
 Template: CU ePAR One Time AdditionalPay Target Sequence: CU Additional Pay
 Entered By: [Redacted] Entered On: 06/12/2015 7:33AM
 Updated By: [Redacted] Updated On: 06/12/2015 7:33AM

Initial **Workflow** **System Update** **Audit**

Document State Transition Personalize | Find | [Print] | [Refresh] First [Left Arrow] 1 of 1 [Right Arrow] Last

| Target State | Target Sub State | Completed Date | Updated By |
|--------------|------------------|-----------------|------------|
| 1 Initial | Ready | 06/12/15 7:33AM | [Redacted] |

[Return to Search](#) [Notify](#)

Hiring Today

1. Create Position
2. Create Funding
3. Approve Funding
4. Approve Position
5. Recruit
6. Enter Hire Data (personal data, job data, employment data)
7. Approve

- Updates made to multiple tables
- Must navigate to make changes

Hiring Tomorrow

1. Enter Transaction
 - a. Create/Modify Position
 - b. Select Non-Person Profile
 - c. Funding
 - d. Route for Approval
2. Once approved, data uploads to CU Careers
3. Recruit
4. Enter Transaction
 1. Complete hire in HCM
 2. Route for Approval
5. Once approved, personal data uploads to HCM

- Several updates through one transaction
- Approval triggers the updates to tables

Terms You Will Hear



- **ePAR** – Electronic Personnel Action Request
- **SmartERP** – Third-party provider that delivers packaged solutions to streamline business processes
- **Transaction pages** – Areas within HCM where users perform data entry



New Tool Bar



Collaborate



Attach



Print



Workflow



Approve



Deny



Hold



*Lifecycle
Viewer*



Preview



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Employee Services

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Action Reasons

- Each transaction is driven by an Action Reason combination.
- The number of combinations has been reduced significantly.

| Action | Action Code | Action Reason Code | Reason Description |
|--------|-------------|--------------------|--------------------|
| Hire | HIR | HIR | New Hire |
| Rehire | REH | REH | Rehire |
| | REH | RAP | Reappointment |
| | REH | REI | Reinstatement |

Transactions: Non-Pay

Smart I-9 **Smart ePAR Non-Pay Actions** Smart ePAR Pay Actions

-  **ePAR Job Change**
Make changes to non-pay related fields
Add Modify
Inquiry
-  **ePAR Group Change**
ePAR Employee Group Change
Add Modify
Inquiry
-  **ePAR POI**
Add or Maintain POI's
Add Modify
Inquiry
-  **ePAR Separation**
Retire or Terminate an Employee
Add Modify
Inquiry
-  **ePAR Contract Pay**
Contract Pay
Add Modify
Inquiry
-  **ePAR Group Termination**
ePAR Employee Group Termination
Add Modify
Inquiry
-  **ePAR Leave**
Leave of Absence, Paid Leave or Return from Leave
Add Modify
Inquiry

Transactions: Pay

Smart I-9

Smart ePAR Non-Pay Actions

Smart ePAR Pay Actions



ePAR Additional Pay

Add One Time Pay or Recurring pay to Employee

Add Modify

Inquiry



ePAR Hire

Hire, Rehire or add Additional Job

Add Modify

Inquiry



ePAR Position

Add, Change or Prepare Position for Hire

Add Modify

Inquiry



ePAR Dept Budget

Funding Changes Only

Add Modify

Inquiry



ePAR Pay Rate Change

Increase or Decrease Current Pay

Add Modify

Inquiry



ePAR Transfer

Transfer from one Department to Another

Add Modify

Inquiry Release



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Employee Services

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Non-Pay Actions



ePAR Job Change

Make changes to non-pay related fields

Add Modify

Inquiry

- Job Change
- Job Change, includes position change

Change Appt End Date, FLSA Change, Update Service Dates, Change Paygroup, Other



ePAR Group Change

ePAR Employee Group Change

Add Modify

Inquiry

Change Appointing Authority, Reports To, Working Title, Faculty Promotion, Job Reclassification, Location Change, Other



ePAR POI

Add or Maintain POI's

Add Modify

Inquiry



ePAR Separation

Retire or Terminate an Employee

Add Modify

Inquiry

All Terminations, including Term for Cause, Death, Disability Retirement, End of Appointment, Exhaustion of Leave, Job Abandonment, Layoff, Not Eligible for Rehire, Other, Probationary Rejection, Resignation and Retirement



Non-Pay Actions



ePAR Contract Pay

Contract Pay

Add Modify

Inquiry

Change dates on a contract or contract pay types (9 pay 9, 9 pay 12, etc)



ePAR Group Termination

ePAR Employee Group Termination

Add Modify

Inquiry

Mass Terminations of employees whose Appointment End Date has been reached



ePAR Leave

Leave of Absence, Paid Leave or Return from Leave

Add Modify

Inquiry

Put an employee on a Short Work Break, Leave of Absence, or Paid Leave of Absence (Sabbatical) or Return them from one



Pay Actions



ePAR Additional Pay

Add One Time Pay or Recurring pay to Employee

Add Modify

Inquiry

One Time Payment or a Recurring Payment



ePAR Hire

Hire, Rehire or add Additional Job

Add Modify

Inquiry

Hires, Rehires, and Reappointments; This can come from CU Careers or be entered manually



ePAR Position

Add, Change or Prepare Position for Hire

Add Modify

Inquiry

Prepare a position for recruiting or a new employee. Can be a vacant, inactive, filled, or new position. Also where you can have HCM send the position to CU Careers.



Pay Actions



ePAR Dept Budget

Funding Changes Only

Add Modify

Inquiry

Enter funding changes



ePAR Pay Rate Change

Increase or Decrease Current Pay

Add Modify

Inquiry

Change for an existing employee, including Demotions, Promotions, Temp to Regular changes, Move to a new job family, Base Pay changes, Percent of time changes and Temporary pay rate changes not done as a recurring payment



ePAR Transfer

Transfer from one Department to Another

Add Modify

Inquiry Release

Transfer an employee from one department to another department



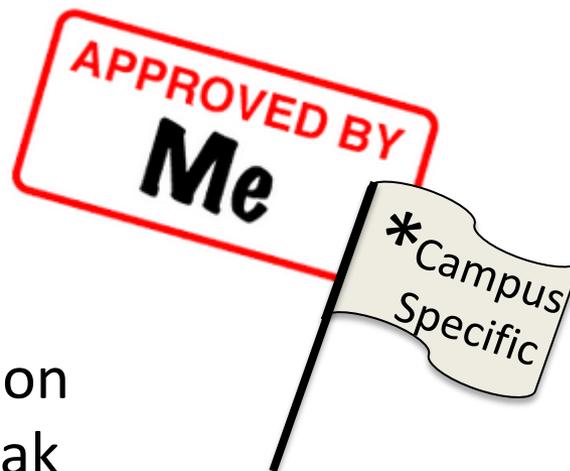
Workflow/Approvals



- Set by Campus (Business Unit)
- Based on the Job Family (Classified Staff, Faculty, Undergraduate Students, etc.)
- Determined by Non-Pay or Pay Action Reason combination

Self- Approvals are Limited:

- POIs
- Funding Distribution Changes (Department Budget Changes)
- Some Terminations – Resignation
- Some Leaves – Short Work Break



Workflow/Approvals

Action: Contract Pay



Action: Hire (and Transfer)



Workflow/Approvals

Action: Job Change with Pay Change



Initiate

Dept. User or Manager*



Approve

Appointing Authority*



Approve

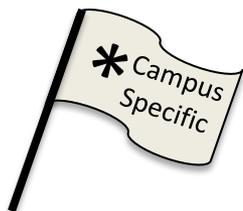
HR (Final Approver)

*Note:

UCCS-Manager Approves;
does not Initiate

*Note:

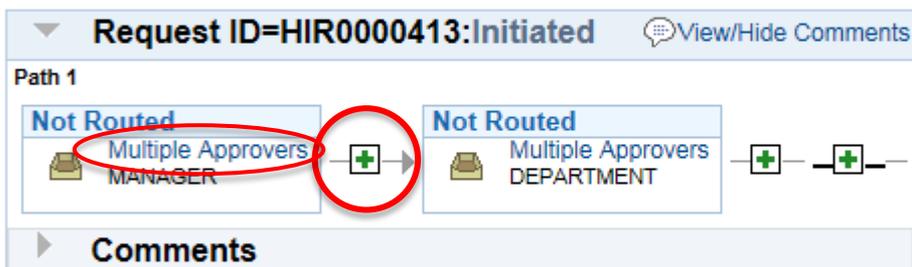
UCCS Only
And
CU-Boulder
(Classified Staff only)



Workflow/Approvals

Approval Map

ePARApproval



Approver #1

Name: Marie McGowan
User ID: MCGO000316
Email ID: marie.m@smarterp.com

Approver #2

Name: Gouse Shaik123957
User ID: SHAI000112
Email ID: gouse.s@smarterp.com



Workflow/Approvals-Approval Inbox

| ePAR Approval Inbox | | | | | | | | Personalize Find   | First  1 of 1  Last |
|----------------------------|----------------------------|--|--------|----------|----------------|---------------|--|--|---|
| ePAR Details | | Employee Details  | | | | | | | |
| Select Flag | Request ID | Document ID | Action | Reason | Effective Date | Status | Reassign Work To | | |
| 1 <input type="checkbox"/> | HIR0000549 | EPAR_HIRE | Hire | New Hire | 03/01/2015 | Initial Ready | <input type="text"/>  | | |

Workflow/Approvals-Personal Data

Biographical Details | Contact Information | Regional | CU Personal Data

Dana Udall Person ID 276536

Name Find | View All First 1 of 1 Last

Effective Date 03/01/2015 + -

Format Type English

Display Name Dana Udall View Name

Biographic Information

Date of Birth 06/13/1974 31 Years 41 Months 2

Date of Death 31

Birth Country USA United States

Birth State

Birth Location Waive Data Protection

Biographical History Find | View All First 1 of 1 Last

*Effective Date 03/01/2015 31 + -

*Gender Female

*Highest Education Level A-Not Indicated

*Marital Status Unknown As of 03/01/2015 31

Language Code

Alternate ID

Full-Time Student

Workflow/Approvals-Job Data

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Dana Udall Empl ID 276536
Employee Empl Record 0

Work Location ? Find First 1 of 1 Last

*Effective Date 03/01/2015

Effective Sequence *Action Hire

HR Status Active Reason

Payroll Status Active *Job Indicator Primary Job

Current

Position Number 00701035 Psychologist

Position Entry Date 03/01/2015
 Position Management Record

Regulatory Region USA United States
Company CU University of Colorado
Business Unit UCB Boulder Campus
Department 10450 Wardenburg Health Center

Department Entry Date 03/01/2015
Location 1WARD Wardenburg Student Health Ctr
Establishment ID CU University of Colorado **Date Created** 08/21/2015

Last Start Date 03/01/2015
Expected Job End Date

What We Looked At...



- We initiated transactions.
- We saw the transactions go through workflow approvals.
- We saw the updates in the tables.

Key Concepts to Remember:

- HCM tables are updated after approvals are completed.
- Each campus determines the workflow process.
- Structured labs will offer opportunities to practice working with transactions.

HCM

Human Capital Management

Paying People



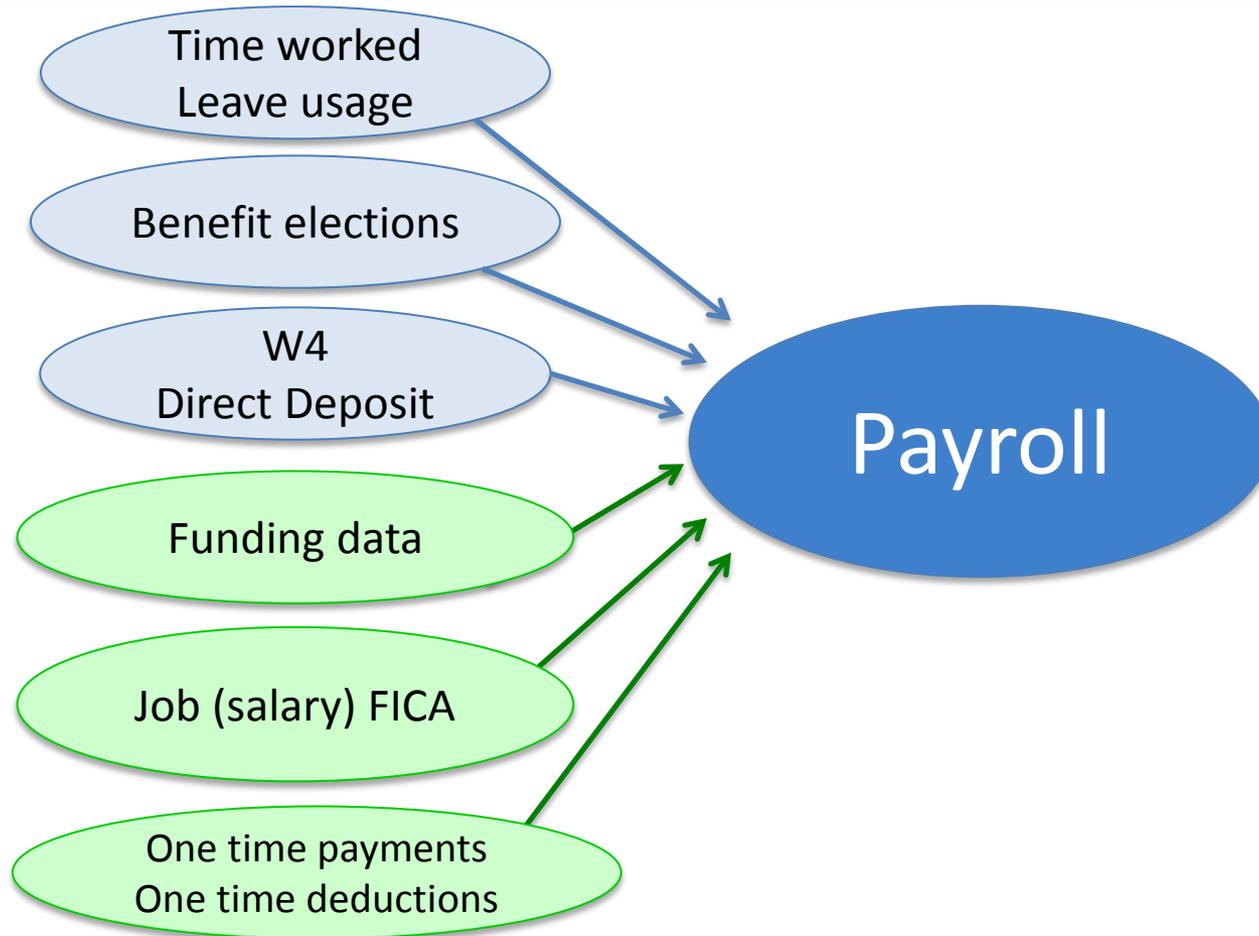
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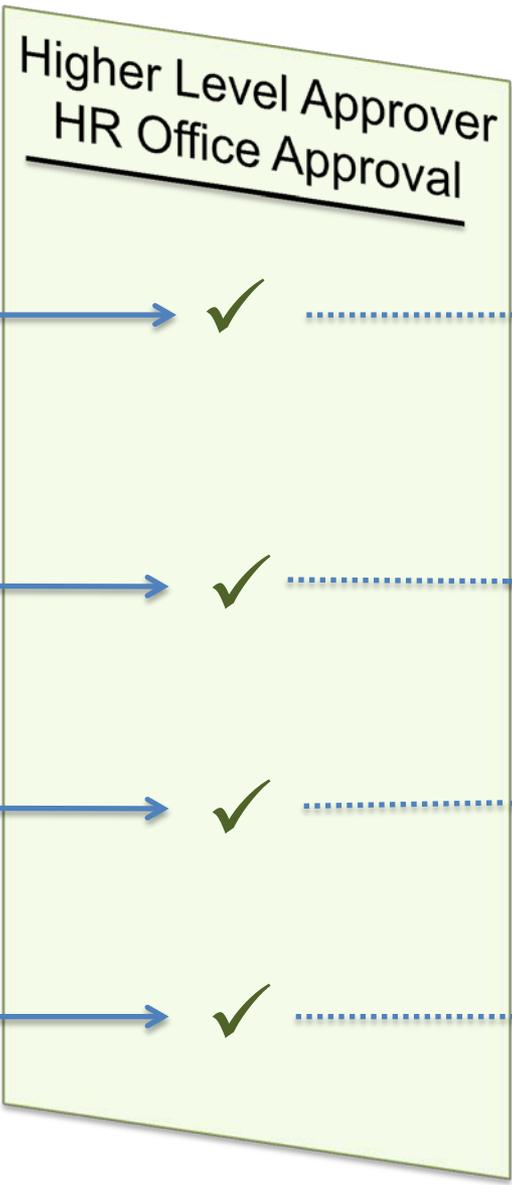
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Transactions that Impact Pay





Managers and HCM Dept. Users

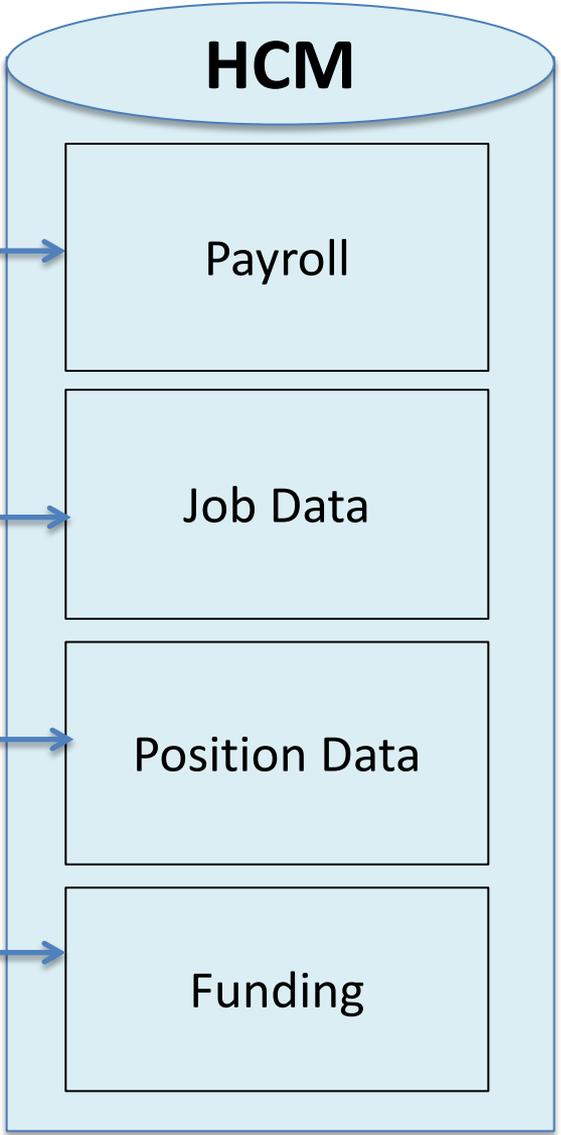


Update Time
 • Corrections
 • One-Time Pays

Update Job Data

Update Position Data

Update Funding



PayGroups are Changing

PayGroups Today:



MON – All employees paid on a monthly cycle



BW – All employees paid on a biweekly cycle

PayGroups Tomorrow:

- Still have different PayGroups for monthly and biweekly cycles
- PayGroups based on jobcodes and similar benefits

Why PayGroups are Changing



- Having more than just two paygroups eliminates many customizations.
- Allows us to use HCM as intended for Payroll Processing.
- Allows for more accurate leave accrual processing for employees that have more than one job.

5 Bi-Weekly and 11 Monthly PayGroups

| PayGroup | Descr | Frequency | Regular Earnings Code | Overtime Code | Eligible for Leave* |
|----------|--------------------------------|-----------|-----------------------|---------------|---------------------|
| FRI | Faculty Recreation Instructors | Biweekly | RGS | OTP | N |
| STG | Student Faculty (bw) | Biweekly | STS | SOT | N |
| STP | Stipends | Biweekly | SP1 | STP | N |
| STU | Student Workers | Biweekly | STH | SOT | N |
| TMP | Temporary - OT Eligible | Biweekly | REG | OTM | N |
| CLX | Classified Exempt | Monthly | RGS | OTP | Y |
| COT | Classified OT Eligible | Monthly | RGS | OTM | Y |
| F12 | 12 Month Faculty | Monthly | RGS | OTP | Y |
| FOT | Other Faculty | Monthly | RGN | OTP | N |
| MON | Faculty - Contracts | Monthly | RGN | OTM | N |
| RES | Residents | Monthly | RES | OTP | N |
| SPD | PreDoc & Stipends | Monthly | STP | OTP | N |
| STM | Student Faculty (mo) | Monthly | STS | SOT | N |
| UOT | University Staff OT Eligible | Monthly | RGS | OTM | Y |
| USN | University Staff Exempt - N/L | Monthly | RGN | OTP | N |
| USX | University Staff Exempt | Monthly | RGS | OTP | Y |

MyLeave

Upgraded and Enhanced



More tightly integrated with HCM

Mobile friendly

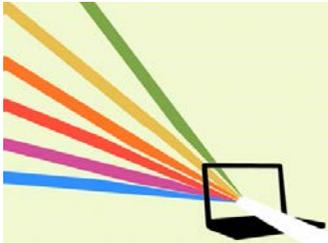


Apple compatible (doesn't use Java)

MyLeave

Upgraded and Enhanced

Batching not required to load transactions



Allows retroactive transactions; loads to payroll

MyLeave

My Leave | My Leave Week | My Leave Day | Time Sheet

Job 0, USX(M)-OT Exempt Today is July 18, 2015 Add Time Month Week Day

<< June July 2015 August >>

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------|---------|-----------|----------|--------------------|----------|
| | | | 1 | 2 | Independence Day 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | Today 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

MyLeave

Add/Edit Event

*From Date: 07/06/2015 *Time: 08 : 00

*To Date: 07/08/2015 *Time: 17 : 00

Include Lunch

Amount: 24.000 [Details](#)

*Reporting To: Job 0 (Supervisor)

*Earnings Code: Vacation Leave

Status: Submit a Request

Description:

SpeedType:

Additional Payments

HCM now has two types of Additional Payments:



One-Time Payments

Recurring Payments



Additional Pay: One-Time



One-Time Payments:

- Single payment to an employee
- Bonus, Award, etc.

Replaces the One-Time Pay batches that were done previously.

Additional Pay: Recurring



Recurring Payments:

- Able to make payments to employee over several months
- All non-base building MCOPs will be recurring payments
 - ADMSTP – Administrative Stipend
 - SUPPLE – Supplemental Pay

Can also be used for Temporary Pay Differential

- Break out pay (earnings) on an employee's pay statement

One-Time Payments



One-Time Payments Today:

- Complete paper form
- Route for many approvals
- Create time collection batch
- Enter data
- Approve batch



One-Time Payments Tomorrow:

- Online form
- Route for approvals online
(Or attach them)
- Once approved, automatic flow to the next payroll

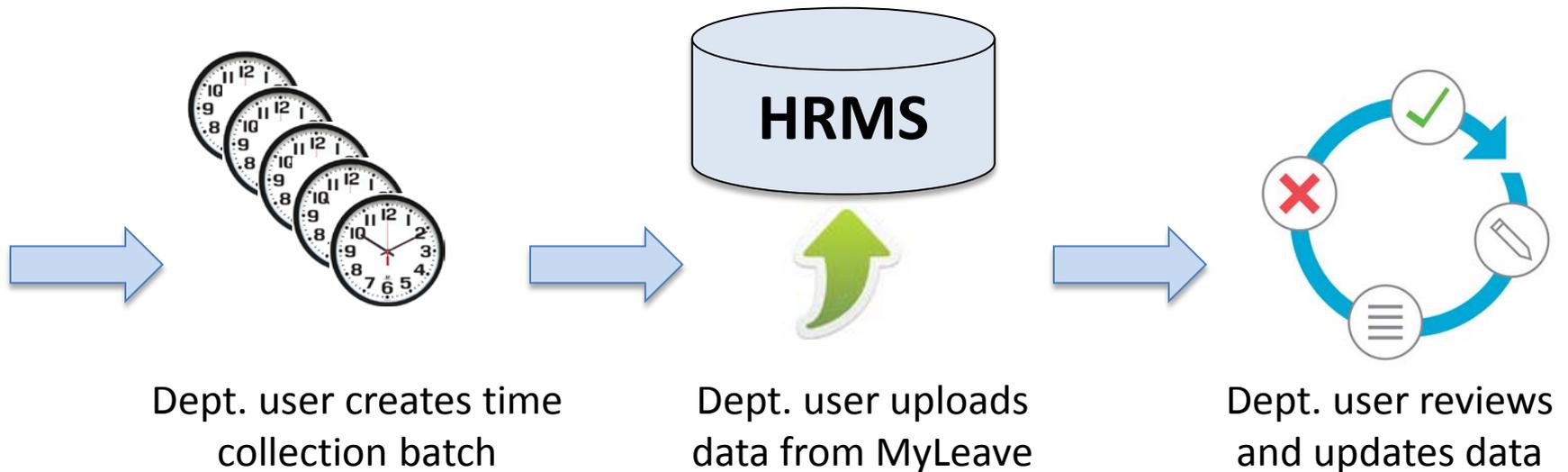


CU Time Process

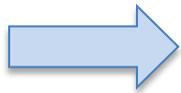
Time Collection Today:



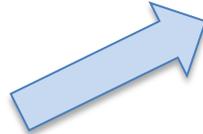
CU Time Process



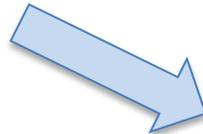
CU Time Process



Dept. user finds
someone to
approve the batch



If approved on time,
processed in next
payroll



If not approved on
time, Dept. user has
to redo for next
payroll



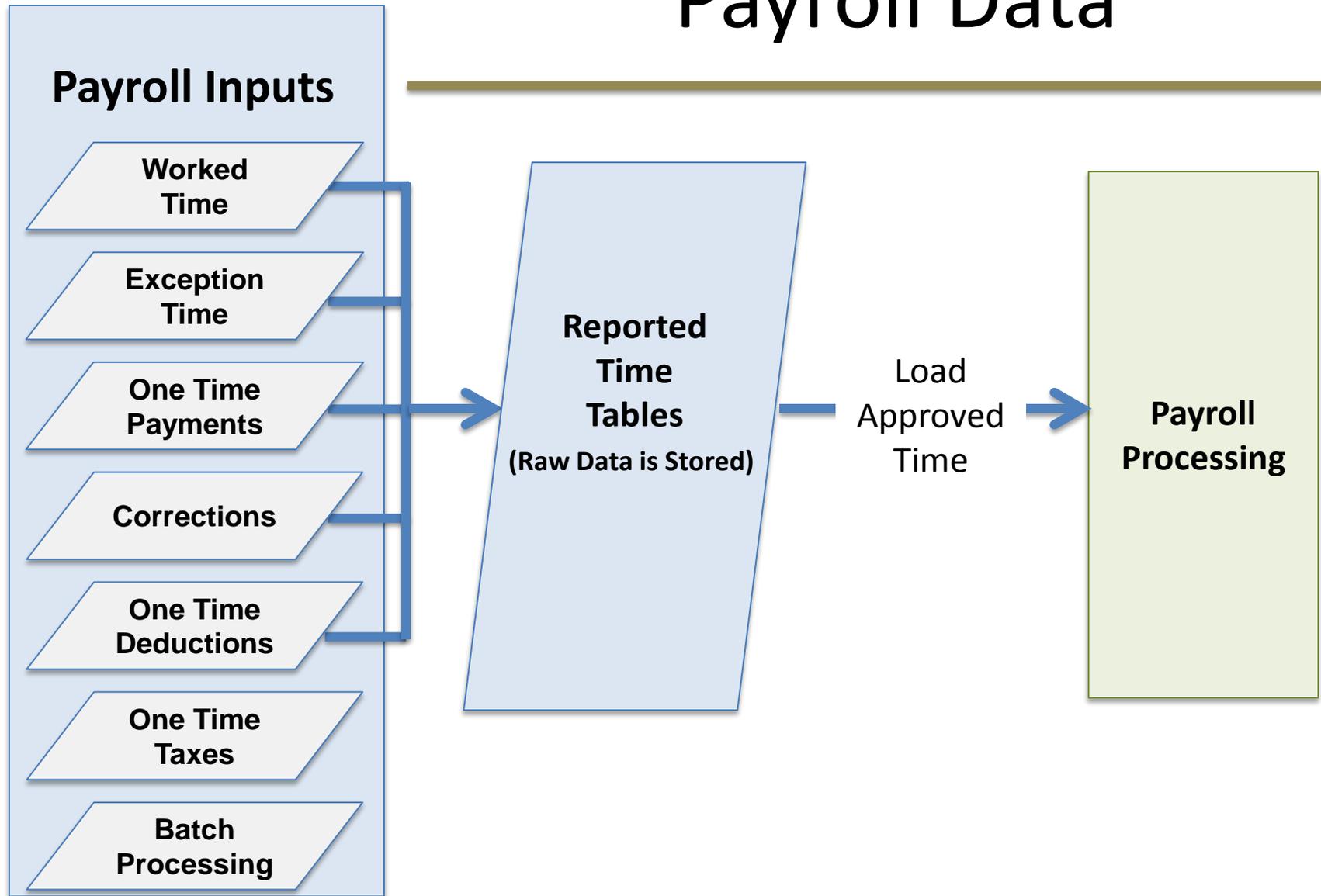
CU Time Process

Time Entry Tomorrow:



Dept. user can review/update by deadline

Payroll Data



New Time Upload Summary

- Earnings Begin and End Dates required
- Time entered and approved at any time
- Oncycle payroll pulls only approved transactions for that payroll
- If Oncycle payroll has passed, approved transactions pull into the next Offcycle or Oncycle payroll
- Batch uploads still possible whenever ready and approved (no longer an overnight feed)
- You still manually add employees into the Reported Time Summary for loading into payroll



Reported Time Summary

Reported Time Summary

Earnings Begin Date: 02/15/2015 Earnings End Date: 02/28/2015

Company: CU University of Colorado Pay Group: STU Student Workers

Department: 10441 UMC-Program Council

Reported Time Summary Personalize | Find | First 1-27 of 27 | Last

Employee Details Batch TimeSheets & Leave Details OneTime Payments

| Select | Off Cycle? | Employee ID | Empl Rcd | Seq Nbr | Name | Position Nbr | Business Unit | Supervisor ID | Reports To | Batch Run ID | SpeedType | Sep Check Nbr | Entry Type | Status | Approval Date | Approver Name | Date Time Modified | Date Time Created |
|--------------------------|--------------------------|-------------|----------|---------|------------|--------------|---------------|---------------|------------|--------------|-----------|---------------|-----------------|----------------|---------------|---------------|------------------------|------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | [REDACTED] | 0 | 1 | [REDACTED] | 00710172 | UCB | [REDACTED] | [REDACTED] | UM1 | | | Batch Timesheet | Needs Approval | | [REDACTED] | 07/20/2015 10:04:45 AM | 07/20/2015 10:04:45 AM |
| <input type="checkbox"/> | <input type="checkbox"/> | [REDACTED] | 0 | 1 | [REDACTED] | 00615787 | UCB | [REDACTED] | [REDACTED] | UM1 | | | Batch Timesheet | Needs Approval | | [REDACTED] | 07/20/2015 10:04:45 AM | 07/20/2015 10:04:45 AM |
| <input type="checkbox"/> | <input type="checkbox"/> | [REDACTED] | 0 | 1 | [REDACTED] | 00668790 | UCB | [REDACTED] | [REDACTED] | UM1 | | | Batch Timesheet | Needs Approval | | [REDACTED] | 07/20/2015 10:04:46 AM | 07/20/2015 10:04:46 AM |
| <input type="checkbox"/> | <input type="checkbox"/> | [REDACTED] | 1 | 1 | [REDACTED] | 00668784 | UCB | [REDACTED] | [REDACTED] | UM1 | | | Batch Timesheet | Needs Approval | | [REDACTED] | 07/20/2015 10:04:47 AM | 07/20/2015 10:04:47 AM |
| <input type="checkbox"/> | <input type="checkbox"/> | [REDACTED] | 0 | 1 | [REDACTED] | 00668621 | UCB | [REDACTED] | [REDACTED] | UM1 | | | Batch Timesheet | Needs Approval | | [REDACTED] | 07/20/2015 10:04:47 AM | 07/20/2015 10:04:47 AM |

Reported Time Summary

Reported Time Summary

Earnings Begin Date 02/15/2015 Earnings End Date 02/28/2015

Company: CU University of Colorado Pay Group: STU Student Workers

Department: 10441 UMC-Program Council

Reported Time Summary Personalize | Find | | First 1-27 of 27 Last

Employee Details | Batch TimeSheets & Leave Details | OneTime Payments

| Select | Off Cycle ? | Employee ID | Empl Rcd | Earnings Code | Reported Hours | Other Pay | Hourly Rate | Amount Work Field | Override Rate | Actual Hours | Long Description | Comments | Off Hours Only | Include Lunch |
|--------|--------------------------|-------------|----------|---------------|----------------|-----------|-------------|-------------------|---------------|--------------|------------------|----------|----------------|---------------|
| 1 | <input type="checkbox"/> | | 0 | STH | 9.500000 | | | 114.000 | | | | | | |
| 2 | <input type="checkbox"/> | | 0 | STH | 32.500000 | | | 474.825 | | | | | | |
| 3 | <input type="checkbox"/> | | 0 | STH | 7.000000 | | | 82.250 | | | | | | |
| 4 | <input type="checkbox"/> | | 1 | STH | 3.500000 | | | 28.805 | | | | | | |
| 5 | <input type="checkbox"/> | | 0 | STH | 4.500000 | | | 47.430 | | | | | | |
| 6 | <input type="checkbox"/> | | 0 | STH | 33.500000 | | | 353.090 | | | | | | |

Contract Pay



Enhanced Features:

- Specify how to prorate a mid-contract pay rate change
- Display details of what has been paid, yet to be paid

Mid-Contract Pay Rate Change Options:

- Increase amount can now be paid over the remaining months of the contract
- Or
- Increase amount (from the periods already paid) can be paid as a lump sum

Contract Pay

Contract Payment Details

Employee Empl ID 555555 Empl Record 0

Contract ID 0000001 Status Active Recalculate Contract No

Contract Payment Sequence

Find | View All First 1 of 2 Last

Contract Sequence 1 Effective 02/01/2015

Contract Information

Company CU University of Colorado
 Pay Group MON Faculty - Contracts
 Contract Begin Date 09/01/2014 Contract End Date 05/31/2015
 Payment Begin Date 09/01/2014 Payment End Date 08/31/2015
 Contract Worth 171820.00

Contract Calendar

Holiday Schedule School Schedule Work Schedule

Pay Rates

Payment Summary

Projected Payments and Actual Earnings

Personalize | Find | View All | First 1-3 of 6 Last

Projected Earnings Actual Earnings

| Status | Pay Period End Date | Off Cycle | Separate Check | Work Days | Contract Regular | Paid Not Earned | Earned Not Paid | Total Paid | Worked | Leave of Absence |
|---------------------|---------------------|-----------|----------------|-----------|------------------|-----------------|-----------------|------------|----------|------------------|
| 1 Payroll Confirmed | 03/31/2015 | N | 0 | 22 | 19091.12 | 0.00 | -4772.78 | 14318.34 | 19384.74 | |
| 2 Active | 04/30/2015 | N | 0 | 22 | 19091.11 | 0.00 | -4772.78 | 14318.33 | 19384.74 | + - |
| 3 Active | 05/31/2015 | N | 0 | 21 | 19091.11 | 0.00 | -4772.78 | 14318.33 | 18503.62 | + - |

Contract Pay

| Projected Payments and Actual Earnings | | | | | | | | | | | | Personalize Find View All   | | First | 1-3 of 6 | Last |
|--|--|-----------|----------------|-----------|------------------|-----------------|-----------------|------------|----------------|--------------|----------|---|---|---|----------|------|
| Projected Earnings | | | | | | | | | | | | Actual Earnings | |  | | |
| Status | Pay Period End Date | Off Cycle | Separate Check | Work Days | Contract Regular | Paid Not Earned | Earned Not Paid | Paid Leave | Earnings Total | Unpaid Leave | Worked | | | | | |
| 1 Payroll Confirmed | 03/31/2015 | N | 0 | 22 | 19091.12 | 0.00 | -4772.78 | 0.00 | 14318.34 | 0.00 | 19384.74 | | | | | |
| 2 Active | 04/30/2015  | N | 0 | 22 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |  |  | | |
| 3 Active | 05/31/2015  | N | 0 | 21 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |  |  | | |

On and Off Cycle Payroll



- Not Changing - Same Schedule as Today
- On Cycle Payroll
 - Running of regular payroll cycles – monthly or biweekly
- Off Cycle Payroll
 - Running of payroll between regular processes
 - Will not need batching
 - Have approved transactions in the Reported Time Table by the deadlines

New for 9.2



Termination for Cause payments paid through direct deposit as needed

Some payments may be processed as a separate check



New Earnings Codes are Coming

- Better ways to record Family Medical Leave
- Additional values to better split out pay
 - Temporary Pay Differentials

Payroll Reports



Most common payroll reports still available:

- Payroll Register
- Pre-Payroll Time report—what is ready for submission
- Post Payroll Report of Time—what was processed on the payroll
- Employee Compensation History
- Unapproved Time

Reports in Cognos, PS Query or as a PeopleSoft Report

What We Looked At...

- Changes to Paygroups
- Improved Time Collection
- Enhancements to MyLeave
- Review of Time Data
- On and Off Cycle Pay
- Contract Pay
- Payroll Reports

Key Concepts to Remember:

- Only approved pay transactions are loaded to payroll
- Enter and approve time changes anytime – before or after payroll

HCM

Human Capital Management

Review and Reports



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

ELEVATE

WorkCenters

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

CU HCM User Workcenter > CU HCM User Workcenter

Search

HCM User WorkCenter

Workforce Administration

- Add a Person
- Add POI Relationship
- Person Organizational Summary
- Job Data

Workforce Development

Organizational Development

- Add/Update Position Info

Alerts

You have no Alerts right now.

CU Student Employment

- CU Student Information
CU Student Information
- CU Work Study Awards
Work Study Student awards maintenance
- CU Work Study Report

Welcome CU HCM User

PeopleSoft WorkCenters provide a one stop page for users to perform different business transactions. Take action on alerts, view reports and analytics or access related components and pages. The WorkCenter delivers data to you instead of you searching through the HCM system for information.

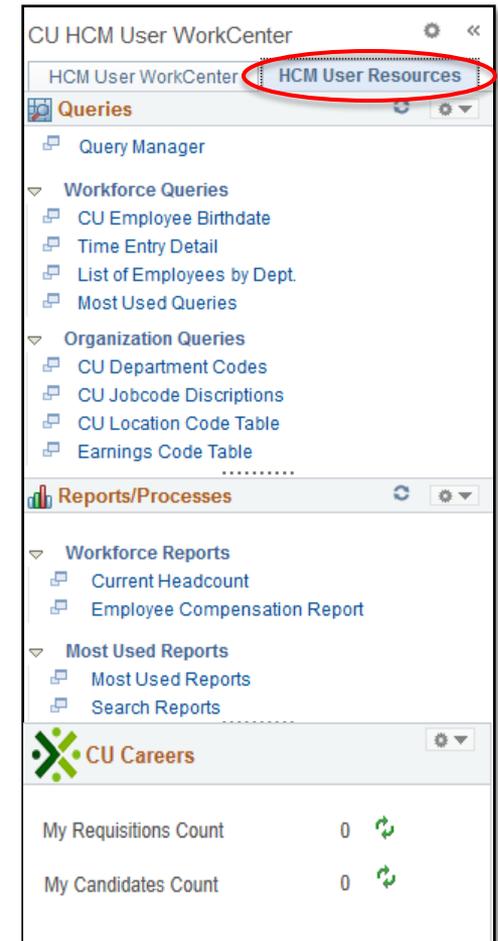
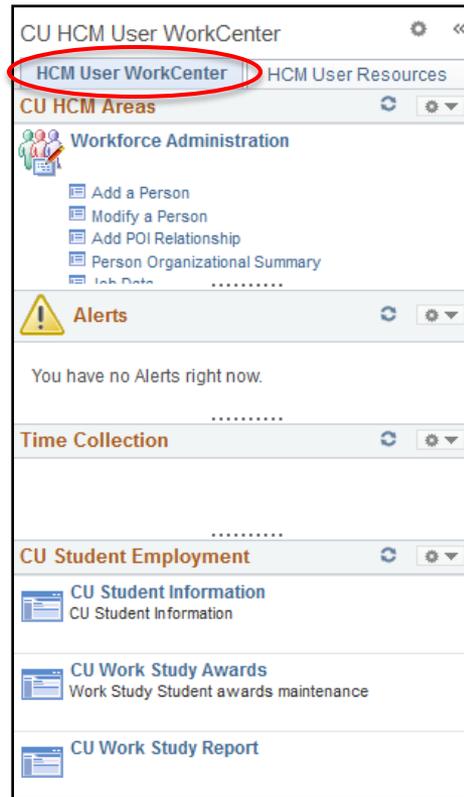
PeopleSoft WorkCenter page allows you to access all the related pages, query results, and links etc. from one central location. It divides the browser window into two frames, an adjustable pagelet area on the left and the target content area on the right.

This is a new experience we think you are going to like. Welcome to the CU HCM User WorkCenter

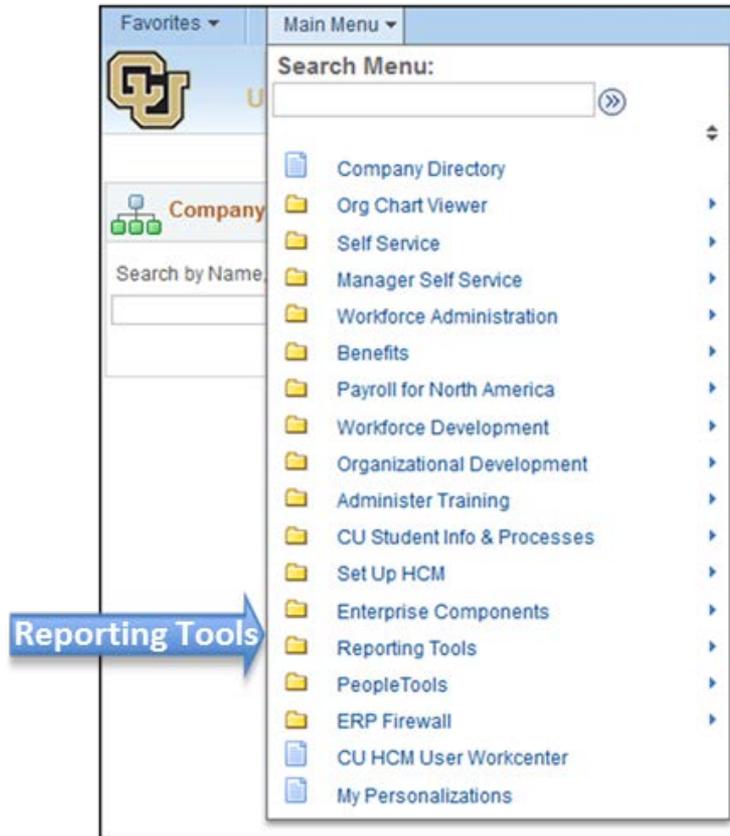
WorkCenters

Quick access to frequently used items

- Queries
- Reports



WorkCenters



Can also navigate using the Main Menu – same as today

Reports Today vs. Tomorrow

Reports Today:

- Produced using an outdated tool
- Some reports are duplicates
- Candidate and requisition data comes from PeopleAdmin

Reports Tomorrow:

- Adding a new tool and updating others
- Duplicate reports will either be consolidated or removed
- Create configurable reports using PS Query
- CU Careers has a new tool for reporting candidate and requisition data

Types of Reports



CU Careers

- Oracle Business Intelligence



ORACLE®

PEOPLESOFT ENTERPRISE

- PeopleSoft Reports
- PeopleSoft (PS) Query



When to Use CU Careers Reports



Previously used in PeopleAdmin (Jobs@CU)

Candidate Information



- Identify Internal Candidates
- Identify Hired Candidates
- Candidate timeframe in step/status

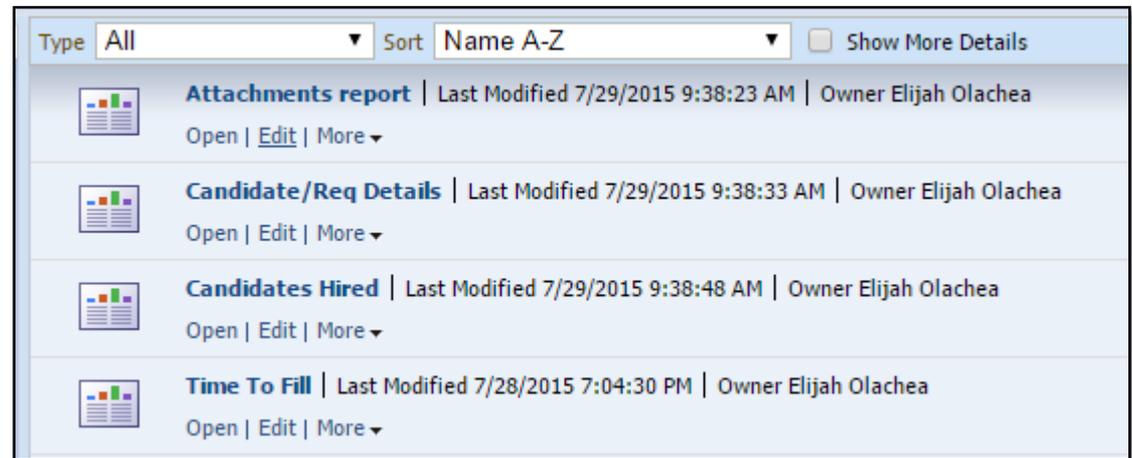
Requisition Data



- Time posted
- Posting Source
- Number of candidates per requisition
- Requisition aging

Types of Reports Available in CU Careers

- Time To Fill
- Candidate Details
- Requisition Details
- Attachments
- Candidates Hired
- More to Come!



The screenshot displays a web interface for managing reports. At the top, there are filters for 'Type' (set to 'All'), 'Sort' (set to 'Name A-Z'), and a 'Show More Details' checkbox. Below the filters is a list of four reports, each with a small icon, a title, a 'Last Modified' timestamp, an 'Owner' name, and a set of action links ('Open', 'Edit', 'More').

| Type | Sort | Show More Details |
|--|------------------------------------|--------------------------|
| All | Name A-Z | <input type="checkbox"/> |
|  Attachments report | Last Modified 7/29/2015 9:38:23 AM | Owner Elijah Olachea |
| Open Edit More ▾ | | |
|  Candidate/Req Details | Last Modified 7/29/2015 9:38:33 AM | Owner Elijah Olachea |
| Open Edit More ▾ | | |
|  Candidates Hired | Last Modified 7/29/2015 9:38:48 AM | Owner Elijah Olachea |
| Open Edit More ▾ | | |
|  Time To Fill | Last Modified 7/28/2015 7:04:30 PM | Owner Elijah Olachea |
| Open Edit More ▾ | | |

Time To Fill Report

Time To Fill

7
Time To Fill
Average Time to Fill

| Position Number | Req Id | Req Title | Current Status | First Posted Date | Filled Date | # Applications Complete | # Internal Applications | Time To Fill (Days) | Campus - Name |
|-----------------|--------|--------------------------------|----------------|-----------------------|-----------------------|-------------------------|-------------------------|---------------------|------------------------|
| 00001478 | 01909 | Admin Assistant III | Canceled | 8/13/2015 10:14:48 AM | | 1 | 0 | | D0001 -- Denver Campus |
| | 01928 | Admin Assistant III | Filled | 8/13/2015 1:39:49 PM | 8/26/2015 12:48:34 PM | 2 | 0 | 13.00 | D0001 -- Denver Campus |
| | 01931 | Admin Assistant | Filled | 8/26/2015 3:49:19 PM | 8/31/2015 3:24:46 PM | 1 | 0 | 10.00 | D0001 -- Denver Campus |
| | 01935 | Admin Assistant | Filled | 8/28/2015 11:42:15 AM | 8/31/2015 1:17:23 PM | 2 | 0 | 3.00 | D0001 -- Denver Campus |
| 00001522 | 01910 | Program Assistant I | Filled | 8/19/2015 8:22:24 AM | 8/19/2015 8:25:52 AM | 1 | 0 | 0.00 | D0001 -- Denver Campus |
| | 01911 | Program Assistant I | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| | 01912 | Program Assistant I | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| | 01913 | Program Assistant I | Approved | | | 0 | 0 | | D0001 -- Denver Campus |
| | 01914 | Program Assistant I | Canceled | | | 0 | 0 | | D0001 -- Denver Campus |
| | 01922 | Program Assistant I | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| | 01923 | Program Assistant I | Sourcing | 8/28/2015 11:33:12 AM | | 2 | 0 | | D0001 -- Denver Campus |
| 00001935 | 01990 | Marketing Coordinator | Sourcing | 9/4/2015 3:03:24 PM | | 3 | 0 | | D0001 -- Denver Campus |
| 00002119 | 02044 | Financial Ed Content Specialis | Sourcing | 9/4/2015 3:00:03 PM | | 3 | 0 | | D0001 -- Denver Campus |
| 00300288 | 01989 | Communication Senior Prof | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| | 02053 | Marketing Manager | Sourcing | 9/4/2015 2:59:17 PM | | 3 | 0 | | D0001 -- Denver Campus |
| 00300423 | 01988 | Finance and Accounting Profess | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| | 02051 | Accountant | Sourcing | 9/4/2015 3:00:03 PM | | 4 | 0 | | D0001 -- Denver Campus |
| 00300444 | 01997 | Executive Assistant | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| | 02013 | Executive Assistant | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| | 02015 | Executive Assistant | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| | 02049 | Executive Assistant | Sourcing | 9/4/2015 2:59:26 PM | | 3 | 0 | | D0001 -- Denver Campus |
| 00350161 | 01940 | Asst Professor | Sourcing | 9/1/2015 2:10:21 PM | | 2 | 0 | | D0001 -- Denver Campus |
| | 01941 | Asst Professor | Filled | | 8/28/2015 11:23:35 AM | 1 | 0 | 0.00 | D0001 -- Denver Campus |
| 00350357 | 01951 | Asst Professor | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| 00350380 | 02026 | Dean | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| 00350445 | 01985 | Hr And Budget Director | Sourcing | 9/4/2015 3:00:03 PM | | 3 | 0 | | D0001 -- Denver Campus |
| 00355004 | 01942 | Chair | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| | 01943 | Chair | Filled | | 8/28/2015 11:29:28 AM | 1 | 0 | 0.00 | D0001 -- Denver Campus |
| 00356200 | 01907 | Student Asst IV | Sourcing | 8/10/2015 1:41:56 PM | | 0 | 0 | | D0001 -- Denver Campus |
| | 01927 | Student Asst IV | Filled | 8/13/2015 1:42:29 PM | 8/26/2015 12:45:46 PM | 1 | 0 | 13.00 | D0001 -- Denver Campus |
| | 01932 | Student Asst IV | Draft | | | 0 | 0 | | D0001 -- Denver Campus |
| 00615173 | 01423 | Human Resources Assistant | Filled | 2/19/2015 10:49:19 AM | 2/24/2015 12:42:28 PM | 2 | 0 | 5.00 | D0001 -- Denver Campus |
| 00620811 | 01908 | Student Asst IV | Filled | 8/10/2015 11:12:33 AM | 8/26/2015 1:25:14 PM | 1 | 0 | 16.00 | D0001 -- Denver Campus |



Ability to Export Reports

PDF Document

Time To Fill



74
Time To Fill
Average Time to Fill

| Position Number | Req Id | Req Title | Current Status | First Posted Date | Filled Date | # Applications Complete | # Internal Applications | Time To Fill (Days) | Campus - Name |
|-----------------|--------|------------|----------------|-----------------------|----------------------|-------------------------|-------------------------|---------------------|-------------------------|
| test | 01345 | Test Job 3 | Filled | 12/10/2014 7:51:01 AM | 2/21/2015 9:20:50 AM | 7 | 0 | 74.00 | B0001 -- Boulder Campus |

Other Formats:

- [Export](#) - [Add to Briefing Book](#)

-  PDF
-  Excel ▶
-  Powerpoint ▶
-  Web Archive (.mht)
-  Data ▶

Attachments Report

Letters, Resume, and Cover Letters

Attachments report

| Position Number | Req. Id | Candidate Id | Candidate Name | Req Title | Submission History Transaction Date | Submission History Transaction By User | Transaction Comments | Transaction Details |
|----------------------|-------------------------|------------------|---|---------------------|-------------------------------------|--|----------------------|--|
| 00001478 | 01928 | 11601.00 | Basin, Arapahoe | Admin Assistant III | 8/14/2015 4:32:27 PM | Candidate | | Resume Test Doc.docx |
| | | 57161.00 | Little, Craig John | Admin Assistant III | 8/13/2015 1:48:24 PM | Candidate | | Test Resume.rtf |
| | | 57200.00 | Diers, Julius | Admin Assistant III | 8/17/2015 8:27:53 AM | Candidate | Cover Letter | Test Cover Letter.docx |
| | | | | | 8/17/2015 8:29:12 AM | Candidate | Resume | Test Resume.rtf |
| | | | | | 8/17/2015 8:29:15 AM | Candidate | Cover Letter | Test Cover Letter.docx |
| | | | | | 8/17/2015 9:07:14 AM | Integrator, WebServices | Confidential LOR | CLOR_Ceaser_Letter_Of_Rec_1.pdf |
| | | | | | 8/17/2015 9:07:45 AM | Integrator, WebServices | Confidential LOR | CLOR_Smith_Letter_of_Rec_2.pdf |
| | | | | | 8/17/2015 9:10:39 AM | Integrator, WebServices | Confidential LOR | CLOR_Shea_Letter_of_Rec_3.pdf |
| | | | | | 8/26/2015 2:43:55 PM | Integrator, WebServices | Confidential LOR | CLOR_Ceaser_Alliance_2015_Conference_Registration_Confirmati.pdf |
| | | | | | 8/27/2015 10:37:02 AM | Integrator, WebServices | Confidential LOR | CLOR_Shea_Alliance_2015_Conference_Registration_Confirmati.pdf |
| 8/28/2015 8:04:17 AM | Integrator, WebServices | Confidential LOR | CLOR_Shea_DUO_Security_Technical_Design.pdf | | | | | |

[Edit](#) - [Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#) - [Copy](#)

Transaction dates show latest updates by candidate

Cognos Reports

Cognos—Pre-defined delivered reports. Best choice for longitudinal reporting and analysis of data trends.



Advantages

- Pulls in data from Finance, CU-SIS, and HCM
- 15 years of data available
- Scheduling and distribution is available

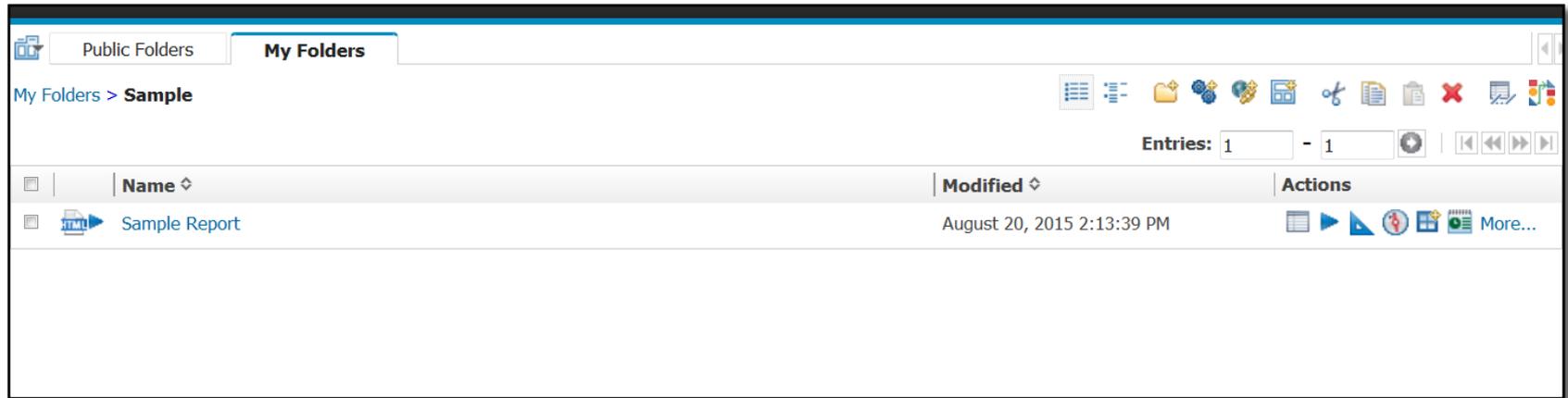
Disadvantages

- *Data is one day old*
- Less flexible than PS Query
- Reports are written by ES staff

How to Run a Cognos Report

The screenshot displays the University of Colorado employee services portal. At the top, there is a navigation bar with 'Favorites' and 'Main Menu' on the left, and 'My Info and Pay', 'Benefits and Wellness', 'Training', 'Forms', 'Business Tools', 'Manager', 'Compliance & Reporting', 'Useful Links', and 'Help / Support' on the right. The 'Compliance & Reporting' menu is open, showing options: 'Compliance and Policy', 'Public Folders', 'My Folders', and 'Faculty Reporting & DEPA'. A red banner at the top right indicates '0 pending approvals'. The main content area features a large banner for 'CUSP Deadline is fast approaching: April 30' with a sub-headline 'The deadline for CU Shared Practices submissions is almost here!' and a call to action 'Your idea could win \$1500! Find out more'. Below the banner are two user service tiles: 'My Info' with a person icon and 'MyLeave' with a clock icon, showing 'Vacation: 360.9 Sick: 623' and a 'Request Leave/Record Time' button. On the right side, there is a 'News' section with 'CU Connect' and several news items.

How to Run a Cognos Report



Cognos Report Options

The screenshot shows the Cognos report interface for the University of Colorado. The header includes the university logo and name, along with the text "EMPLOYEE SERVICES". The main content area displays a "Sample Report" with a table of employee data. In the top right corner, there are several interactive elements: a "Keep this version" button, a "Print" icon, and an "Add this report" button. A dropdown menu is open, showing options for "View in HTML Format", "View in PDF Format", and "View in Excel Options". A blue arrow points from the text below to the "View in Excel Options" option.

| EMPLID | LAST NAME | FIRST NAME |
|--------|-----------|------------|
| 276400 | TEST | LI |
| 276526 | TEST | TES |

| | |
|------|------|
| SUCA | SUCA |
| SUCA | SUCA |

Report options are located in the top right corner

PeopleSoft Reports

PeopleSoft Reports—Pre-defined delivered and custom reports that are available within PeopleSoft.



Advantages

- *Uses real-time data*
- Complex logic
- Many will be available day 1
- Scheduling and distribution is available

Disadvantages

- Run through Report Manager
- Requires HCM user credentials
- Changes to reports require a technical resource

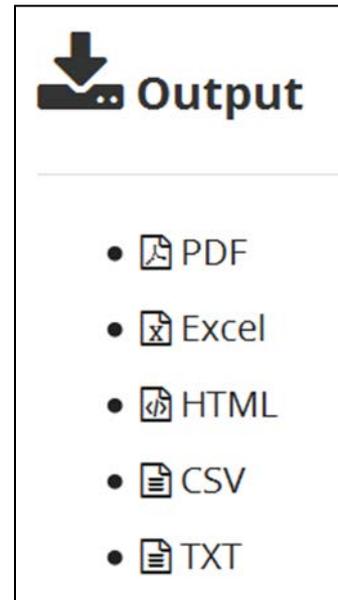
Available PeopleSoft Reports

Delivered

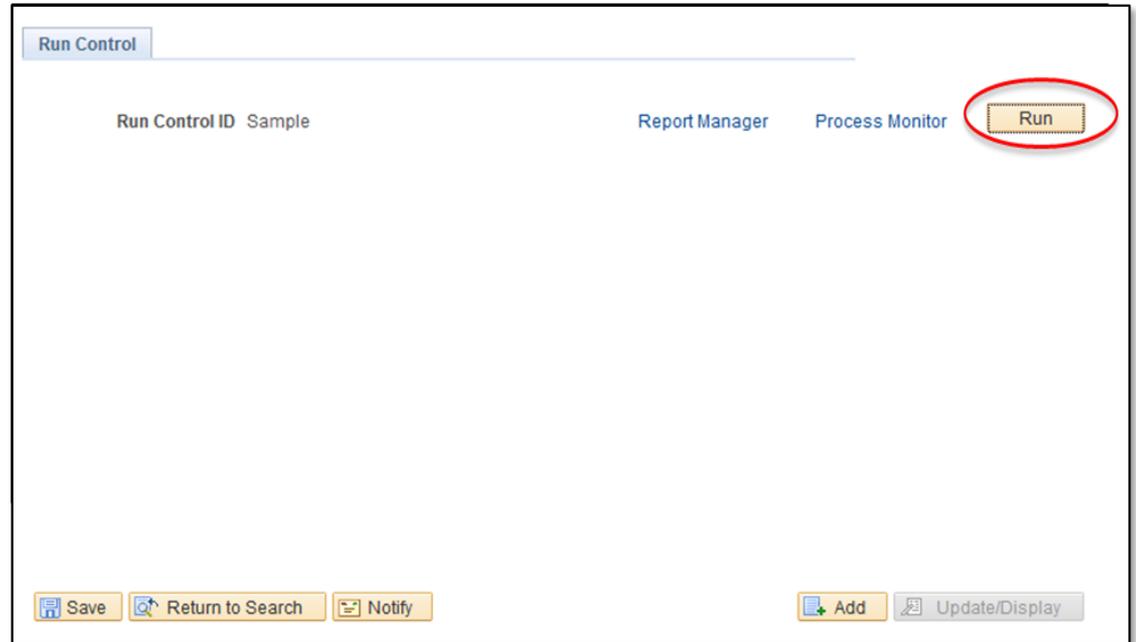
- Vacant Position Report
- Position Status Report
- Emergency Contacts
- Employee Birthday Report
- Many more!

Custom

- Employee Compensation
- Payroll Register
- Time Report (listing of all time and leave reported in a payroll)
- Many more!



How to Run a PeopleSoft Report



If prompted, enter report parameters, and then click run.

How to Run a PeopleSoft Report

Process Scheduler Request

User ID SHEL000088 Run Control ID Sample

Server Name Run Date 09/15/2015

Recurrence Run Time 5:55:40PM

Time Zone 🔍

Process List

| Select | Description | Process Name | Process Type | *Type | *Format | Distribution |
|-------------------------------------|------------------------------|--------------|--------------|-------|---------|--------------|
| <input checked="" type="checkbox"/> | Vacant Budgeted Position Rpt | POS007 | BI Publisher | Web | HTM | Distribution |

OK Cancel



Choose desired format from available and click OK.

How to Run a PeopleSoft Report

List Explorer Administration Archives

View Reports For

Folder Instance to Refresh

Name Created On Last 1 Days

Reports Personalize | Find | View All | | First 1-4 of 4 Last

| | Report | Report Description | Folder Name | Completion Date/Time | Report ID | Process Instance |
|---|---------------------|--------------------------------|-------------|----------------------|-----------|------------------|
| 1 | POS007 - POS007.pdf | POS007 - POS007.PDF | General | 09/15/15 5:42PM | 906702 | 1937710 |
| 2 | POS007 - POS007.htm | POS007 - POS007.HTM | General | 09/15/15 4:22PM | 906693 | 1937702 |
| 3 | PER010 | EMPLOYEE TURNOVER ANALYSIS | General | 09/15/15 4:20PM | 906692 | 1937704 |
| 4 | POS004 | ACTIVE POSITION HISTORY REPORT | General | 09/15/15 4:19PM | 906691 | 1937703 |

[Go back to Vacant Position](#)

List | Explorer | Administration | Archives

Sample PeopleSoft Report

| | | | | |
|--|---------------------------------------|-----------------|-------------------------|--|
| Report ID: POS016CU | PeopleSoft VACANT POSITION LISTING | | | Page No. 1 |
| | | | | Run Date 09/15/2015 |
| | | | | Run Time 17:52:21 |
| Department ID: 51000 Employee Services | | | | |
| <u>Position Nbr</u> | <u>Dept ID</u> | <u>Job Code</u> | <u>Description</u> | <u>Reg/Temp</u> <u>Full/Part Time</u> <u>Status</u> <u>Status Date</u> |
| 00001315 | 51000 | 1100 | Distinguished Professor | Regular >= 50% No Action 06/05/2013 |
| 00001567 | 51000 | 2268 | Data Analyst | Regular >= 50% Approved 12/19/2014 |
| 00001433 | 51000 | 2445 | Wellness Program Mgr | Regular >= 50% Approved 06/11/2014 |
| 00665007 | 51000 | 2448 | HR Professional | Regular >= 50% Approved 10/08/2013 |

| | A | B | C | D | E | F | G | H |
|----|---------------------|----------------|-------------------------|----------------------|-----------------|-----------------------|---------------|--------------------|
| 1 | | PeopleSoft | | | | | | |
| 2 | Report ID: | POS016CU | VACANT POSITION LISTING | | Page No. 1 | | | |
| 3 | Run Date | 9/15/2015 | | | | | | |
| 4 | Run Time | 17:40:32 | | | | | | |
| 5 | Department ID: | 51000 | Employee Services | | | | | |
| 6 | Position Nbr | Dept ID | Job Code | Description | Reg/Temp | Full/Part Time | Status | Status Date |
| 7 | 1433 | 51000 | 2445 | Wellness Program Mgr | Regular | >= 50% | Approved | 6/11/2014 |
| 8 | 1567 | 51000 | 2268 | Data Analyst | Regular | >= 50% | Approved | 12/19/2014 |
| 9 | 2380 | 51000 | 2448N | Payroll Professional | Regular | >= 50% | Approved | 7/8/2015 |
| 10 | 616634 | 51000 | 4102 | Student Asst II | Temporary | < 50% | Approved | 1/14/2013 |

PS Query

PS Query—Ad hoc reporting tool delivered within PeopleSoft that lets you find and run existing reports, or define and run your own reports.



Advantages

- *Uses real-time data*
- Ability to drill down
- Can be created by all users
- Scheduling and distribution is available

Disadvantages

- Requires an understanding of PeopleSoft table structures if creating your own query
- Requires HCM user credentials

Available PS Queries

- CU_DEPARTMENT_TBL
- CU_FUNDING_SUSPENSE
- CU_TRAINING_REPORT
- CU_PERSONNEL_ACTIONS_REPORT
- CU_POI_REPORT
- Many more!

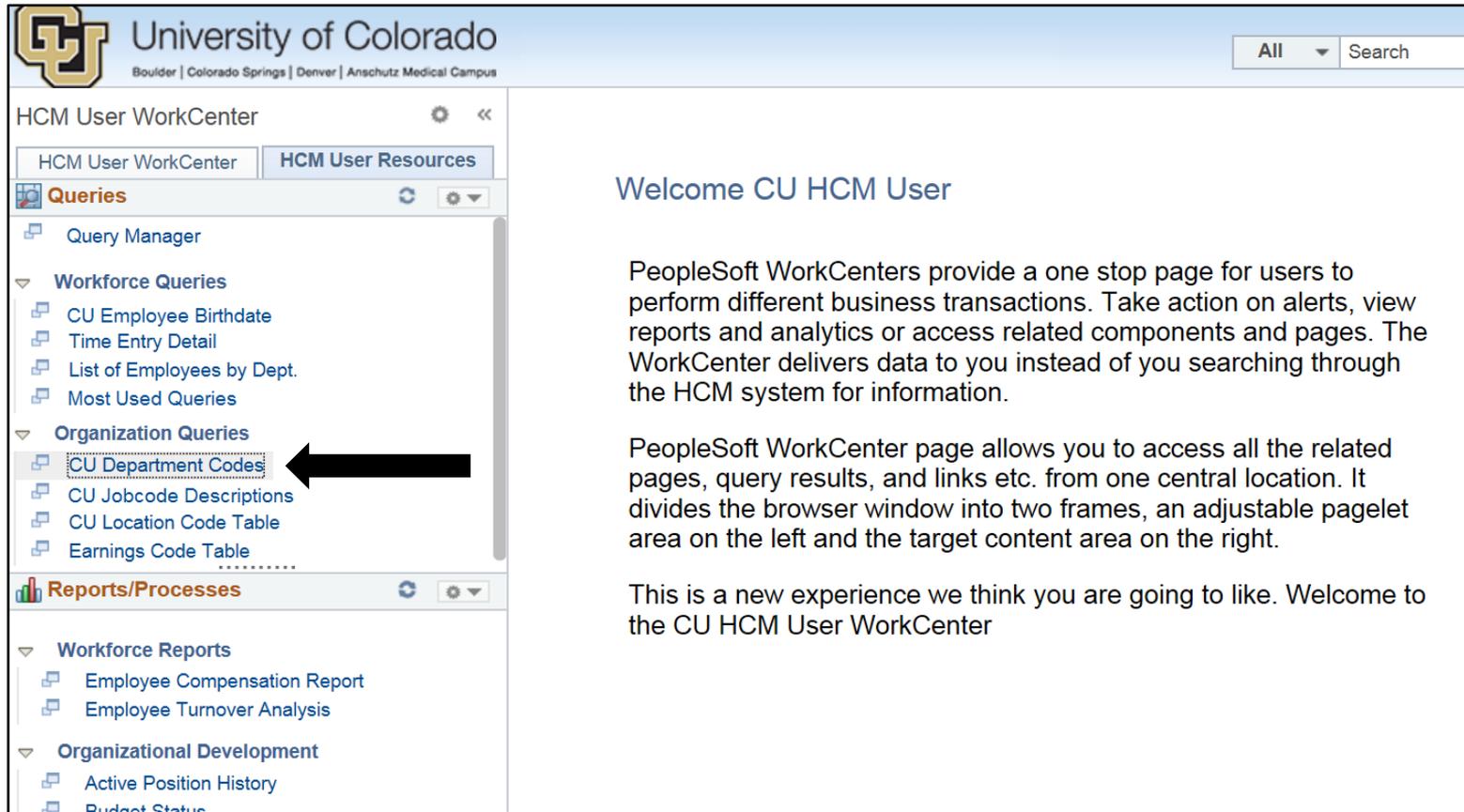


Output

-  PDF (only available for scheduled queries)
-  Excel
-  HTML

How to Run a PS Query

From the WorkCenter:



University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Search

HCM User WorkCenter

HCM User WorkCenter HCM User Resources

Queries

- Query Manager
- Workforce Queries
 - CU Employee Birthdate
 - Time Entry Detail
 - List of Employees by Dept.
 - Most Used Queries
- Organization Queries
 - CU Department Codes**
 - CU Jobcode Descriptions
 - CU Location Code Table
 - Earnings Code Table

Reports/Processes

- Workforce Reports
 - Employee Compensation Report
 - Employee Turnover Analysis
- Organizational Development
 - Active Position History
 - Budget Status

Welcome CU HCM User

PeopleSoft WorkCenters provide a one stop page for users to perform different business transactions. Take action on alerts, view reports and analytics or access related components and pages. The WorkCenter delivers data to you instead of you searching through the HCM system for information.

PeopleSoft WorkCenter page allows you to access all the related pages, query results, and links etc. from one central location. It divides the browser window into two frames, an adjustable pagelet area on the left and the target content area on the right.

This is a new experience we think you are going to like. Welcome to the CU HCM User WorkCenter

How to Run a PS Query

The screenshot displays the HCM User Workcenter interface. The left sidebar contains navigation menus for Queries, Reports/Processes, and CU Careers. The main display window shows the results of a query titled "CU_DEPARTMENT_TABLE- CU Department Codes". The results are presented in a table with columns for Eff Date, Dept ID, Status, Description, Short Desc, Default Location, and Default Local Tax. The table lists 24 department entries, starting with the Office of the Chancellor and ending with the VC-Vice Chancellor for Research.

| | Eff Date | Dept ID | Status | Description | Short Desc | Default Location | Default Local Tax |
|----|------------|---------|--------|---------------------------------|------------|------------------|-------------------|
| 1 | 01/01/2008 | 10001 | A | Office of the Chancellor | Chancellor | 1UCTR | NO LOCAL |
| 2 | 01/01/1901 | 10002 | A | Boulder Faculty Assembly | BldFacAsmb | 1RGNT | NO LOCAL |
| 3 | 01/01/1901 | 10003 | A | Staff Council | StaffCncl | 1UMC | NO LOCAL |
| 4 | 01/01/1901 | 10004 | A | Planning, Budget & Analysis | PlnBdgtAnl | 1RGNT | NO LOCAL |
| 5 | 01/01/1901 | 10018 | A | Athletics-Business Affairs | AthBusAff | 1STAD | NO LOCAL |
| 6 | 01/01/1901 | 10023 | A | Ombuds-Office | Ombuds | 1WLRD | NO LOCAL |
| 7 | 10/20/2000 | 10025 | A | University Communications | Univ Comm | 1ARCE | NO LOCAL |
| 8 | 01/01/1901 | 10026 | A | Inst Relations-Publications | IR-Public | 1ARCE | NO LOCAL |
| 9 | 01/01/1901 | 10030 | A | Diversity & Equity | Div&Eq | 1RGNT | NO LOCAL |
| 10 | 01/01/2007 | 10031 | A | VC - Academic Affairs | VC-AcadAff | 1RGNT | NO LOCAL |
| 11 | 01/01/1901 | 10032 | A | MCDB-Bio Sciences Initiative | BIOSCINIT | 1BS5 | NO LOCAL |
| 12 | 01/01/2014 | 10035 | A | VCAA: Faculty Teaching Excelnc | FacTchExc | 1ATLS | NO LOCAL |
| 13 | 01/01/1901 | 10036 | A | VCAA: Assoc VC Undergrad Educ | VCAA: Asso | 1RGNT | NO LOCAL |
| 14 | 02/01/2012 | 10039 | A | VCAA: Undergr Enrichment Prgms | VCAA UndEn | 1LIBR | NO LOCAL |
| 15 | 01/01/1901 | 10040 | A | VCAA: ROTC-Air Force | ROTC-AF | 1STAD | NO LOCAL |
| 16 | 01/01/1901 | 10041 | A | VCAA: ROTC-Army | ROTC-Army | 1STAD | NO LOCAL |
| 17 | 01/01/1901 | 10042 | A | VCAA: ROTC-Naval | ROTC-Naval | 1STAD | NO LOCAL |
| 18 | 01/01/1901 | 10043 | A | VCAA: Colo Alliance For Sci | CoAlliSci | 1MSSC | NO LOCAL |
| 19 | 01/01/1901 | 10044 | A | VCAA: Presidents Ldrshp Class | PresLdrCls | 1LIBR | NO LOCAL |
| 20 | 01/01/1901 | 10045 | A | Admissions | Admissions | 1RGNT | NO LOCAL |
| 21 | 06/01/2001 | 10046 | A | Financial Aid | FinAid | 1RGNT | NO LOCAL |
| 22 | 07/30/2004 | 10048 | A | Orientation | Orientatn | 1RGNT | NO LOCAL |
| 23 | 07/30/2007 | 10051 | A | ITS-Administration Old 6/2010 | ITS-Admin | 1COMP | NO LOCAL |
| 24 | 01/01/1901 | 10057 | A | VC-Vice Chancellor for Research | VC-Vice Ch | 1RGNT | NO LOCAL |

Results are shown in the display window

How to Run a PS Query

From Query Manager:

Query Manager

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

Find an Existing Query | Create New Query

*Search By begins with

Search Advanced Search

Search Results

*Folder View

Check All Uncheck All *Action Go

| Select | Query Name | Descr | Owner | Folder | Edit | Run to HTML | Run Excel |
|--------------------------|--------------------------------|--------------------------------|---------|--------|------|-------------|-----------|
| <input type="checkbox"/> | CU_DEPARTMENT_TABLE_TB | CU Department Codes | Private | | | HTML | Excel |
| <input type="checkbox"/> | CU_LOCATION_CODE_TABLE_TB | CU Location Code Table | Private | | Edit | HTML | Excel |
| <input type="checkbox"/> | CUSTOM00_GENDER_RATIO_ANALYSIS | Custom00-Gender Ratio Analysis | Public | | Edit | HTML | Excel |
| <input type="checkbox"/> | CUSTOM01_INJURY_SUMMARY | Custom01-Injury Summary | Public | | Edit | HTML | Excel |
| <input type="checkbox"/> | CUSTOM02_SALARY_BUDGET_LISTING | Custom02-Salary Budget Listing | Public | | Edit | HTML | Excel |
| <input type="checkbox"/> | CUSTOM03_RETIREMENT_FORECAST | Custom03-Retirement | Public | | Edit | HTML | Excel |

Run to HTML opens results in a new tab – can also run directly to Excel

Sample Report w/ Drilldown

CU_DEPARTMENT_TABLE_TB- CU Department Codes

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (257 kb)

[View All](#)

First 1-100 of 1465 [Last](#)

| | Eff Date | Dept ID | Status | Description | Short Desc | Default Location | Default Local Tax |
|---|------------|---------|--------|-----------------------------|------------|------------------|-------------------|
| 1 | 01/01/2008 | 10001 | A | Office of the Chancellor | Chancellor | 1UCTR | NO LOCAL |
| 2 | 01/01/1901 | 10002 | A | Boulder Faculty Assmbly | BldFacAsmb | 1RGNT | NO LOCAL |
| 3 | 01/01/1901 | 10003 | A | Staff Council | StaffCncl | <u>1UMC</u> | NO LOCAL |
| 4 | 01/01/1901 | 10004 | A | Planning, Budget & Analysis | PlnBdgtAnl | 1RGNT | NO LOCAL |
| 5 | 01/01/1901 | 10018 | A | Athletics-Business Affairs | AthlBusAff | 1STAD | NO LOCAL |
| 6 | 01/01/1901 | 10023 | A | Ombuds-Office | Ombuds | 1WLRD | NO LOCAL |
| 7 | 10/20/2000 | 10025 | A | University Communications | Univ Comm | 1ARCE | NO LOCAL |
| 8 | 01/01/1901 | 10026 | A | Inst Relations-Publications | IR-Public | 1ARCE | NO LOCAL |
| 9 | 01/01/1901 | 10030 | A | Diversity & Equity | Div&Eq | 1RGNT | NO LOCAL |

Default Location field has been linked to the Location Code query

Sample Report w/ Drilldown

CU_LOCATION_CODE_TABLE_TB- CU Location Code Table

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#)

First 1-1 of 1 Last

| | Eff Date | Location | Description | Short Desc | Building | Address 1 | Address 2 | City | State | Postal |
|---|------------|----------|----------------------------|------------|----------|------------------|-----------|---------|-------|--------|
| 1 | 01/01/1901 | 1UMC | University Memorial Center | UMC | 205 | 1669 Euclid Ave. | | Boulder | CO | 80309 |

Clicking the drilldown link from Default Location opens a new tab with the location information for that Location Code



Summary Comparison of Reporting Tools

| Report Features | CU Careers | Cognos | PeopleSoft Reports | PS Query |
|-------------------------------|-----------------|--------|--------------------|----------|
| Real Time Data | ✓ Near (30 min) | ✗ | ✓ | ✓ |
| Pre-Defined/Delivered Reports | ✓ | ✓ | ✓ | ✓ |
| Ad Hoc Data | ✗ | ✗ | ✗ | ✓ |
| Scheduling and Distribution | ✓ | ✓ | ✓ | ✓ |
| Built-in Analysis Tools | ✓ | ✓ | ✗ | ✗ |
| HCM User Credentials | ✗ | ✗ | ✓ | ✓ |

How Reports Will Evolve

- More reports will be added
- Cognos will eventually incorporate CU Careers and time collection data!
- Increased agility means reports can evolve faster



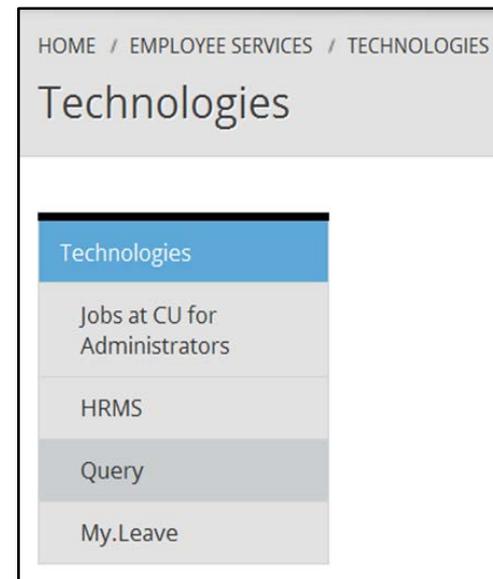
Reports Resources

<http://www.cu.edu/employee-services/query>

- PS Query Introduction video
- List of available CU queries and tables
- HRMS Security Access Form

For questions concerning HCM data

Email: hcmdata@cu.edu



What We Looked At...

- WorkCenters – a new, easy-to-use tool
- New and different reporting tools
 - CU Careers – Oracle Business Intelligence
 - Cognos
 - PeopleSoft Reports
 - PS Query

Key Concepts to Remember:

- CU Careers is the new home for reports that used to be run in PeopleAdmin
- There are many reports and queries available
- If you need assistance, just ask!

Thank You

- Email questions to: hcm_community@cu.edu
- Subscribe to our blog at:
<https://www.cu.edu/blog/hcm-community>

