



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

HRMS Training Course

HRMS Reports and Reviews

Employee Services

www.cu.edu/es

303-860-4200

Overview of Reviews and Reports

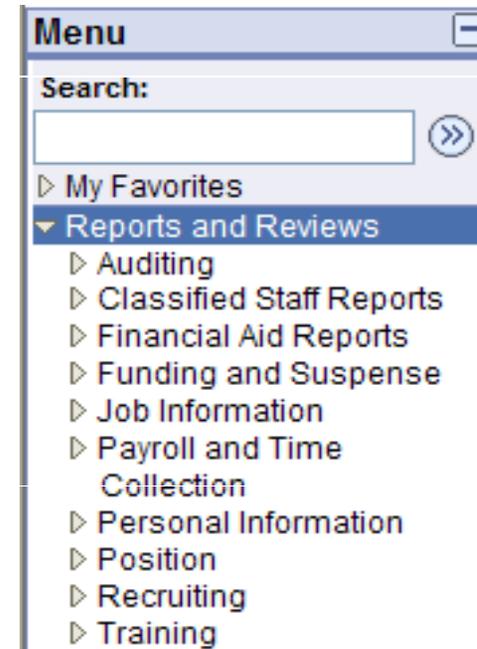
- Reviews and Reports Resources
- Finding Review and Report Pages
- Review pages – Quick reference
- Identify helpful review pages
- Dispelling reporting myths
- HRMS Reporting
- Which reports to run: Why and When

Reviews and Reports

In HRMS :

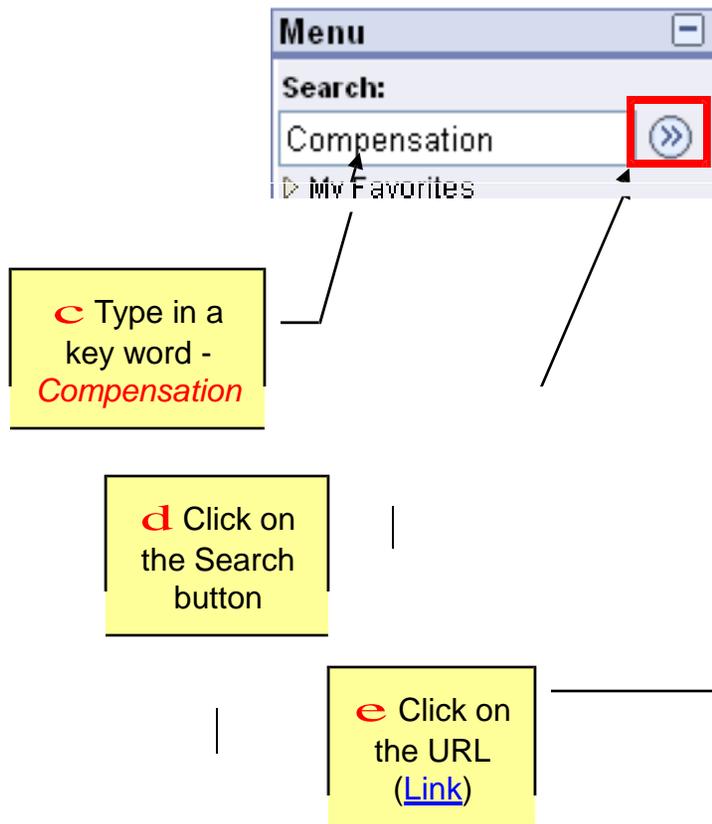
○ Designed for quick reference within tasks

- ▢ Auditing
- ▢ Funding and Suspense
- ▢ Job Information
- ▢ Payroll and Time Collection
- ▢ Personal Information
- ▢ Position
- ▢ Recruiting
- ▢ Training



Finding Review and Report Pages

- Simple as 1, 2, 3



Search

Enter search keywords separated by a space. Use quotes for any phrases. For example: Countries 'United States'

New Search Search Within Results

Compensation [Customize Settings](#)

[Hide Summaries](#)

Search Results

- 1 [Job Data](#)
Enter job information including work location and compensation details.
Home>Workforce Administration>Job Information>Job Data
- 2 [Job Summary](#)
Displays job information and compensation rates for an employee.
Home>Workforce Administration>Job Information>Review Job Information>Job Summary
- 3 [Job Summary](#)
Displays job information and compensation rates for an employee.
Home>Reports and Reviews>Job Information>Job Summary
- 4 [Time Entry Audit Report](#)
Report time entries with rate or compensation overrides.
Home>Workforce Administration>Workforce Reports>Time Entry Audit Report
- 5 [Employee Compensation](#)
Employee Compensation
Home>Reports and Reviews>Payroll and Time Collection>Employee Compensation

Reviews and Reports

- Which format is the report?
PDF and CSV are the main formats used

Process Scheduler Request

User ID: T_PPL Run Control ID: ma

Server Name: PSUNX Run Date: 03/06/2007 
Recurrence: Run Time: 8:44:46AM [Reset to Current Date/Time](#)
Time Zone: 

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Empl Job Data - Fund Dist Hist	PER501CU	SQR Report	Web	PDF	Distribution

OK Cancel



Review Pages: Quick Reference Tool

- Easy access to data
- Specific Data Search – one position, an employee, a job code series

Paycheck Distribution

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

Find an Existing Value

Company:	begins with	<input type="text"/>	
Pay Group:	begins with	<input type="text"/>	
Pay Period End Date:	=	<input type="text"/>	
Off Cycle ?		<input type="checkbox"/>	
Page #:	=	<input type="text"/>	
Line #:	=	<input type="text"/>	
Paycheck Number:	=	<input type="text"/>	
EmplID:	begins with	<input type="text"/>	
Name:	begins with	<input type="text"/>	

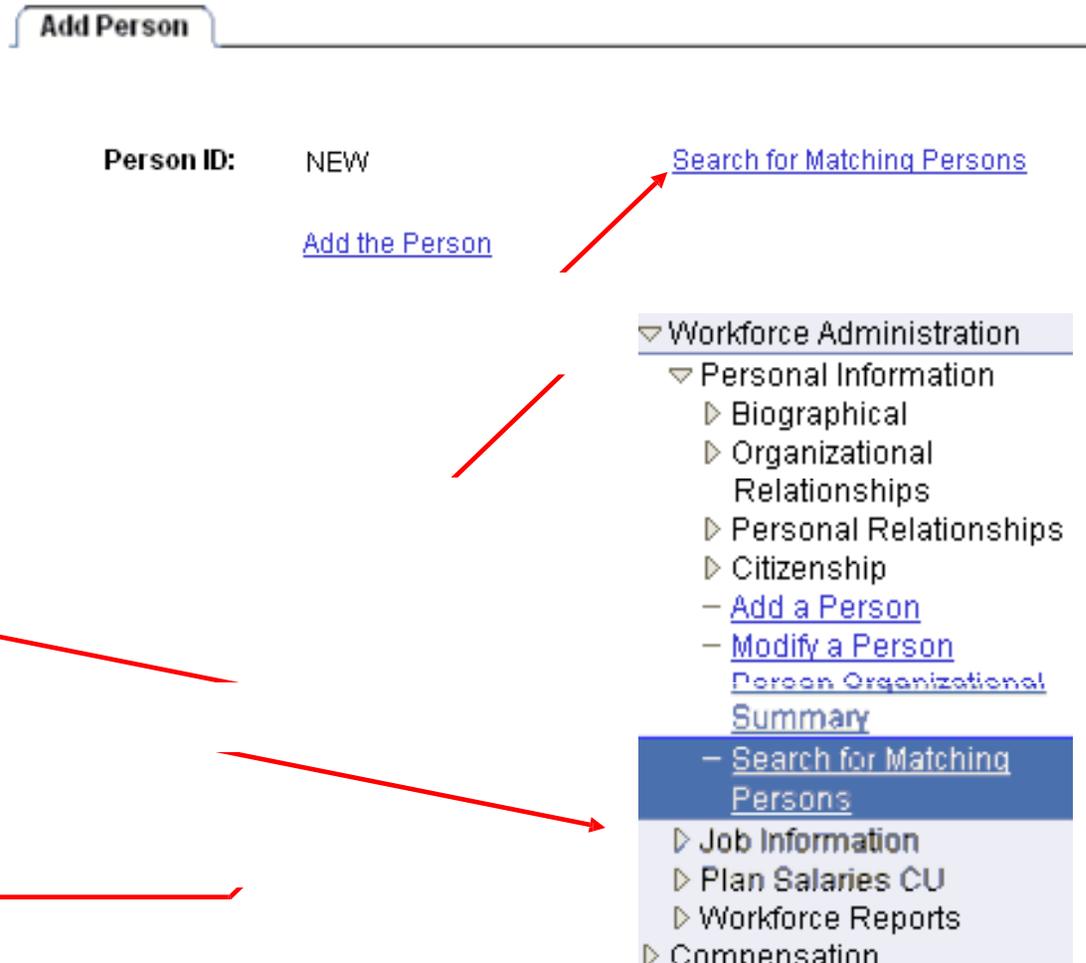
[Basic Search](#)  [Save Search Criteria](#)

HRMS Review Pages

- Paycheck Distribution
- Position Data Summary
- Job Summary
- Position Funding History
- Search for Matching Persons
- Job List
- Leave Accruals
- Review Training Summary/Student Training Summary



Search for a Matching Persons



Click on:
Search for Matching
Persons

Search for a Matching Person

Search Parameter: ADHOC_CU1

ADHOC_CU1

Search Result Rule

Search Result Code: Adhoc Results CU

[User Default](#)

Search

Clear All

Carry ID Reset

Search Criteria

Search Fields	Operand	Value
First Name	Begins With	<input type="text"/>
Middle Name	Begins With	<input type="text"/>
Last Name	Begins With	<input type="text"/>
Date of Birth	Equals	<input type="text"/>
National Id	Begins With	<input type="text"/>

Enter Available Criteria:

First Name
Middle Name
Last Name
Date of Birth
National ID (SSN)

Click Search

Fields are case sensitive. Using less criteria to pull in a larger result list is often more useful than narrowing the results too much. Use care when searching by National ID --- you will exclude any POI results that do not have SSN entries.

Search for a Matching Person Results

Search Results

Search Type: Person Ad Hoc Search
Search Parameter: ADHOC_CU1 ADHOC_CU1
Result Code: ADHOC_RES_CU Adhoc Results CU

Search Results Summary

[Return to Search Criteria](#)

Number of ID's Found: 3
Search Order Number: 10 CS_AdHoc Search

		EmpID	First Name	Middle Name	Last Name	Date of Birth	National ID	
1	Carry ID	123456	Scott	R	Smith	08/25/1972	*****6314	Person Organizational Summary
2	Carry ID	234567	Scott	K	Smith	08/10/1980	*****2404	Person Organizational Summary

Click Carry ID to
'carry' the ID to
other areas

Click [Person](#)
[Organizational Summary](#)
to view University
Relationship

Job List Review

Search:

- ▷ My Favorites
- ▷ Reports and Reviews
- ▷ Recruiting
- ▽ Workforce Administration
 - ▷ Personal Information
 - ▽ Job Information
 - ▷ Contract Administration
 - ▽ Review Job Information
 - Job Summary
 - Work Study
 - Job List
- ▷ Reports
 - Add Employment Instance
 - Job Data

Job List

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

Find an Existing Value

EmpID:

Name:

Last Name:

Last 4 SSN:

[Basic Search](#)

Important
before and
after hiring

Job List

Rcd #	Eff Date	Job Code	Description	Reg/Temp	%Time	Pay Group	FTE	Pay Status	Appoint End Dt	DeptID	Description	Comp Freq	Position
0	08/13/2006	4106	Student Asst VI	T	2.50	MON	0.100000	A	05/05/2007	10247	British Studies	H	00672965
1	08/13/2006	4106	Student Asst VI	T	2.50	BW	0.100000	T	08/12/2006	10247	British Studies	H	00667829
2	09/01/2006	1503	Grad Part-Time Instructor	T	25.00	MON	0.200000	A	05/31/2007	10723	Pgm for Writing and Rhetoric	M	00602029
3	09/01/2006	3205	Student Stipend	R	100.00	MON		A	05/31/2007	10126	Center for Humanities&Arts	M	00628495

Review Training Summary

Review Training Summary

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

Find an Existing Value

EmpID:
Name:
Last Name:
Home Department:
Last 4 SSN:
Category Code:
Subcategory Code:

No row level security

[Basic Search](#)
[Save Search Criteria](#)

Student Training Summary

Coyote, Wile E

Empid: 117858

Category Code

Subcategory Code

Training Summary

[Customize](#) | [Find](#) | [View All](#) |
 First 1-12 of 41

Course	Title	Session #	Training Date	Attendance	Grade	Category Code	Subcategory Code
B10009	FLSA-PPL	0002	07/19/2006	Completed		B	1
B10015	Hire WkStudy/Hrly Students-PPL	0002	07/12/2006	Completed		B	1
B10016	Family Medical Leave Admin-PPL	0001	06/23/2006	Completed		B	1
B10012	Compensation Class Stf-PPL	0002	05/28/2006	Completed		B	1
C00020	Workers' Comp OJI-PPL	0002	05/23/2006	Completed		C	0
B10017	Interwvs, Ref Cks, Hiring-PPL	0001	05/18/2006	Completed		B	1
B10011	Interv Hiring & Selection-PPL	0002	05/09/2006	Completed		B	1
B10013	Class Stf HRMS Processes-PPL	0002	04/11/2006	Completed		B	1
A00037	EarnCode/Inq&Rpt-HRMS-UCB-PPL	0001	04/06/2006	Completed		A	0
B10010	PDQ-PPL	0001	11/17/2005	Completed		B	1

From Review...

- Review pages provide:
- “Snapshot” – easy access to data
- Production database – real time data
- Specific Data Search – one employee, one position, one job code series
- More limited parameters than reports



To Reporting...

- Tracking data 
- Multiple parameter options 
- Capture large amount of data
- May be dependant upon Payroll Processing
- Formatting and printing capability 

Reporting Myths

I must add a new Run Control ID for each report I run.

FALSE



HRMS is designed to use the same Run Control ID for each report. However, there is the ability to add multiple Run Control IDs as needed.

Reporting Myths – Run Control IDs

Example: If responsible for two Department IDs, set up one for each Department

Suspense Reports

Run Control ID: ASFC

[Report Manager](#)

Report Request Parameters

Campus:

OR

DeptID: A&S Faculty Council

Date Range

From Date:

End Date:

Suspense Reports

Run Control ID: ASP

[Report Manager](#)

Report Request Parameters

Campus:

OR

DeptID: A&S Personnel

Date Range

From Date:

End Date:

Note: Run Control IDs may also be numeric values

Reporting Myths – Accessing Reports

I must run a new report each time I want to view data.

FALSE

System allows users to access reports run in the last 90 days.

Reporting Myths – Retrieving Reports

- Retrieve reports run in the last 90 days
- Click on the Report Name (Description)

The screenshot shows a web application interface for report management. On the left is a 'Menu' sidebar with a search bar and a tree view of categories. The main area has tabs for 'List', 'Explorer', 'Administration', and 'Archives'. Below the tabs is a 'View Reports For' section with filters for 'User ID', 'Type', 'Last' (15 Days), 'Status', 'Folder', and 'Instance'. A 'Refresh' button is next to the 'Last' filter. Below this is a 'Report List' table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, and Details. The 'Position Status Report' row is highlighted with a red box. At the bottom, there are 'Select All' and 'Deselect All' checkboxes, a 'Delete' button, and a note: 'Click the delete button to delete the selected report(s)'.

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1519	3205	Payroll Register Acct Report	03/07/2007 10:11:06AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	1364	2762	Payroll Register	03/05/2007 1:07:47PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	1363	2761	Position Status Report	03/05/2007 12:51:09PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	1362	2760	PAY060CU	03/05/2007 12:41:56PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	1361	2759	Campus Box Table	03/05/2007 12:40:23PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	1360	2758	Employee Birthdays	03/05/2007 12:39:55PM	Acrobat (*.pdf)	Posted	Details

Reporting in PeopleSoft HRMS

Be aware of parameter selections

Menu

Search:

- My Favorites
- Reports and Reviews
 - Auditing
 - Funding and Suspense
 - Job Information
 - Benefits with No Earnings
 - Contract Pay
 - Employees on Leave of Absence
 - End Of Appointment
 - Job Status**
 - Personnel Actions
 - Personnel Actions History
 - Personnel Roster
 - Salary History by Department
 - Salary History by Employee
 - Temporary Employees
 - Job List
 - Job Summary
 - Work Study
 - Leave Accrual Summary
 - Department Org Report
 - Background Check Report
 - Leave Taken
 - PPL Search

Job Status Report

Run Control ID: kew3 [Report Manager](#) [Process Monitor](#) [Run](#)

Report Request Parameters

Campus: Job Code:

DeptID: 20153 (Leave blank for all departments) As Of Date:

Job Status

Approved Rejected All Statuses

Proposed No Action Taken

Jobcode Series (leave blank for all): [Find](#) First 1 of 1 Last

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

Reporting in PeopleSoft HRMS

Important to set date parameters for the shortest time frame possible

University of Colorado

Menu

Search:

- My Favorites
- Reports and Reviews
 - Auditing
 - Classified Staff Reports
 - Financial Aid Reports
 - Funding and Suspense
 - Job Information
- Payroll and Time Collection
 - Employee Compensation**
 - Leave Accrual
 - Leave Balance - Terminated EE
 - Overtime
 - Payroll Register
 - Payroll Register Accounting
 - Time Entry
 - Time Entry (1 TimePay)
 - Time Entry Archive
 - Time Entry Archive (1 TimePay)
 - Employee Compensation History
- Personal Information
- Position
- Recruiting

Runctl Pay060cu

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

Report options

DeptID: 20061 SOM-Barbara Davis Center

OR

EmpID:

Note: Leaving DeptID and EmpID blank will print all employees in all departments

Sort Options

Empid

Employee Last Name

Report options

Pay End Dates Between 10/01/2006 and 10/31/2006

Show Terminated Employees

Pay Group: (Leave blank for all paygroups)

Save Return to Search Notify Add Update/Display

Reporting in PeopleSoft HRMS

Employee Compensation Report can be used to calculate earnings for the 3/9^{ths} rule

The screenshot shows the PeopleSoft HRMS interface for running a report. On the left is a 'Menu' pane with a search box and a tree view. The tree view is expanded to 'Payroll and Time Collection', and 'Employee Compensation' is selected. The main area shows the report configuration for 'Runctl Pay060cu'. The 'Run Control ID' is 'clk'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The 'Report options' section includes 'DeptID: 51000' (Payroll & Benefit Services) and an empty 'EmplID' field. A note states: 'Note: Leaving DeptID and EmplID blank will print all employees in all departments'. Below this is a 'Sort Options' section with radio buttons for 'Emplid' and 'Employee Last Name'. Another 'Report options' section shows 'Pay End Dates Between' from '01/01/2006' to '12/31/2006', a checked 'Show Terminated Employees' checkbox, and a 'Pay Group' field with a search icon and the instruction '(Leave blank for all paygroups)'. A red dashed circle highlights the 'Show Terminated Employees' checkbox, and a red rectangle highlights the 'Pay Group' field.

Menu

Search:

- My Favorites
- Reports and Reviews
 - Auditing
 - Classified Staff Reports
 - Financial Aid Reports
 - Funding and Suspense
 - Job Information
- Payroll and Time Collection
 - Employee Compensation**
 - Leave Accrual
 - Leave Balance - Terminated EE
 - Overtime
 - Payroll Register
 - Payroll Register Accounting
 - Time Entry
 - Time Entry (1 TimePay)
 - Time Entry Archive
 - Time Entry Archive (1

Runctl Pay060cu

Run Control ID: clk

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

Report options

DeptID: 51000 Payroll & Benefit Services

OR

EmplID:

Note: Leaving DeptID and EmplID blank will print all employees in all departments

Sort Options

Emplid

Employee Last Name

Report options

Pay End Dates Between 01/01/2006 and 12/31/2006

Show Terminated Employees

Pay Group: (Leave blank for all paygroups)

Utilizing the Payroll Calendar

- Gray Days: HRMS Production is unavailable for transactions
- Reports Related to Payroll Dates: Sample Calendar (next slide)

MARCH 2009 – University of Colorado Payroll Calendar – BOULDER

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY SUNDAY
					1
2 Run Payroll Register Report BW PPE 2/21 (Pay Day 2/27)	3	4 Due to PBS @ 10am • Check Stops • Direct Deposit Pulls BW Pay Day 3/6	5	6 BW PAY DAY – PPE 2/21 (Pay ID 02/21/09)	7 BW Pay Period 2/22 – 3/7 Pay Period End (PPE) 3/7 (Pay ID 03/07/09) 8
9 Due to PBS @ 5pm • Form W-4, Direct-Deposit BW PPE 3/7 UCB @ 5 pm BW PPE 3/7 • Job Data & Position Data entered for approval.	10	11 Approval Deadline @ 5pm • Position, Funding, Job Data BW PPE 3/7	12 Time Collection Close @ 5pm BW PPE 3/7 UCB @ 5 pm MON PPE 3/31 • Job Data & Position Data entered for approval.	13 Processing BW PPE 03/07/09	14 15
16 Run Payroll Register Report BW PPE 3/7 (Pay Day 3/20) Due to PBS @ 5pm • Form W-4, Direct-Deposit MON PPE 3/31 Approval Deadline @ 5pm • Position, Funding, Job Data MON PPE 3/31	17 Time Collection Close @ 5pm MON PPE 3/31 UCB @ 5 pm BW PPE 3/21 • Job Data & Position Data entered for approval.	18 Processing MON PPE 3/31/09 • HR Production Down • HR Reporting Available Due to PBS @ 10am • Check Stops • Advice Pulls BW Pay Day 3/20	19 Processing MON PPE 3/31/09 • HR Production Down • HR Reporting Available	20 Processing MON PPE 3/31/09 • HR Production Down • HR Reporting Available BW PAY DAY – PPE 3/7 (Pay ID 03/07/09)	21 BW Pay Period 3/8 – 3/21 Pay Period End (PPE) 3/21 (Pay ID 03/21/09) 22
23 Run Payroll Register Report MON PPE 3/31 (Pay Day 3/31) Due to PBS @ 5pm • Form W-4, Direct-Deposit BW PPE 3/21	24 Approval Deadline @ 5pm • Position, Funding, Job Data BW PPE 3/21	25 Time Collection Close @ 5pm BW PPE 3/21	26 Processing BW PPE 03/21/09 Due to PBS @ 10am • Check Stops • Advice Pulls MON Pay Day 3/31	27 <i>Spring Break Holiday - Boulder</i> UCB closed PBS closed	28 29
30 Run Payroll Register Report BW PPE 3/21 (Pay Day 4/3)	31 MON PAY DAY – PPE 3/31 (Pay ID 03/31/09)				

Reporting Days Throughout the Month

Early in the month (EM)

Prior to Payroll Deadline (PP)

Time Collection Dates (TC)

After Payroll (AP)

MON	TUES	WED	THURS	FRI	SAT/SUN
					1
2 EM	3 EM	4 EM	5	6	7
8					
9	10 PP	11 PP	12 TC	13 <i>BW payroll processing</i>	14
	15 TC				16
17 AP					18
19 PP					20
					21
					22
23 AP	24 TC	25 PP	26	27 <i>BW payroll processing</i>	28
					29
30 AP	31				

Always print current campus Payroll Calendar and note deadlines

Early in the month (EM) ■

Within the first week -

- Summary Suspense Report
- Funding Dist – Dept ID
- End of Appointment Report
- Employee Job Data-Fund Dist

MON	TUES	WED	THURS	FRI	SAT/ SUN
					1
2 EM	3 EM	4 EM	5	6	7
9	10	11	12	13	14
16	17	18	19	20	21
23	24	25	26	27	28
30	31				29



Clean up data and rerun reports to verify information is correct

Suspense Report - Parameters

Menu El

Search:

My Favorites (R)

- "" Reports and Reviews
 - Auditing
 - Classified Staff Reports
 - Financial Aid Reports
- "" Funding and Suspense
 - Fund Dis!
 - Funding Distribution - OepD
 - Funding Distribution - PosNo
 - Campus Level Suspense Counts
 - Funding Distribution Status
- **Suspense Reports**
- Paycheck Distribution
- Transfers
- PET Jobcode SWeeo

J Suspense Reports)L-----

Run Control ID: ckp

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

Report Request Parameters	
Campus:	CO.
	OR
DeptID:	000 10. Payroll & Benefit Services
Date Range	
From Date:	10/3/01/2007 GI
End Date:	10/31/2007 GI

Suspense Report Process Scheduler

Process Scheduler Request

User iO: R00070

RunControl iO: cKp

Server Name: P-SUNX

Run Date: 11/20/07

Recurrence: [Calendar icon]

Run Time: @:00:46PM

[Reset to Current DateTime](#)

Time Zone: [Dropdown]

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	1-Summary Suspense Report	POS019CU	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	2-Funding Not Approved	POS020CU	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	4-No Current Funding	POS022CU	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	5-Funding End Dt < Appt End Dt	POS023CU	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	G-Break in Funding Oist	P0302GCU	3QR Report	Web	PDF	Distribution

OK Cancel

End of Appointment

Appointment Expires

Expired (This Year)

Within 10 Days

Within 30 Days

Within 60 Days

Set parameter for 30 days when running on a monthly basis

PeopleSoft
END OF APPOINTMENT/CONTRACT

<u>EmplRcd#</u>	<u>JobCode</u>	<u>JobTitle</u>	<u>Position#</u>	<u>Appoint/Contract</u> <u>End Date</u>	<u>Comp Freq.</u>	<u>Remaining</u> <u>Days</u>
0	G3J4IX	State Service Trainee IV	00657938	22-NOV-2005	H	19
0	G3A1IX	Admin Assistant Int	00600731	22-NOV-2005	H	19
0	B1C1TX	Accounting Technician I	00664970	17-NOV-2005	H	14
0	D8H1TX	Security I	00636389	22-NOV-2005	H	19
1	G3J2IX	State Service Trainee II	00671170	07-NOV-2005	H	4

Prior to Payroll Deadline (PP)

Take campus payroll deadlines into account:

- Job Status
- Funding Distribution Status
- Position Status

MON	TUES	WED	THURS	FRI	SAT/ SUN
					1
2	3	4	5	6	7
					8
9	10 PP	11 PP	12	13	14
					15
16 PP	17	18	19	20	21
					22
23	24	25 PP	26	27	28
					29
30	31				



Avoid waiting until the last minute

Job Status - Parameters

- Menu
 - Classified Staff Reports
 - Financial Aid Reports
 - Funding and Suspense
 - Job Information
 - Action Reason Report
 - Benefits with No Earnings
 - Contract Pay
 - Employees on Leave of Absence
 - End Of Appointment
 - Job Status**
 - Personnel Actions
 - Personnel Actions HSC
 - Personnel Actions History
 - Personnel Roster
 - Salary History by Department
 - Salary History by Employee
 - Temporary Employees
 - Job List
 - Job Summary
 - Work Study
 - Leave Accrual Summary
 - Payroll and Time Collection
 - Personal Information
 - Position
 - Recruiting
 - Training
 - Recruiting
 - Workforce Administration
 - Benefits
 - Compensation
 - Time Collection
 - Payroll for North America
 - Workforce Development
 - Organizational Development
 - Enterprise Learning

Job Status Report

Run Control ID: test

[Report Manager](#)

[Process Monitor](#)

Run

Report Request Parameters

Campus:

Job Code:

DeptID: (Leave blank for all departments)

As Of Date: 10/31/2006

Job Status

- Approved
- Rejected
- All Statuses
- Proposed
- No Action Taken

Jobcode Series (leave blank for all):

- Classified Staff
- Clinical Faculty - 1201-1299
- Exempt Professional 2101-2199
- Fellowships - 3201 - 3299
- High School 4301-4399
- Medical Residents 3101 - 3199
- Off Camp Work Study 4201-4299
- Other Faculty - 1401 - 1499
- Other State Institutions 4401
- Regular Faculty 1100-1199
- Research Faculty - 1301 - 1399
- Student Faculty - 1501 - 1599
- Student Hourly - 4101 - 4199
- Temporary - 6101 - 6199

Always set to last day of the month

Funding Distribution Status - Parameters

University of Colorado

Menu Search:

- My Favorites
- Reports and Reviews
 - Auditing
 - Classified Staff Reports
 - Financial Aid Reports
- Funding and Suspense
 - Employee Job Data - Fund Dist
 - Funding Distribution - DeptID
 - Funding Distribution - PosNo
 - Campus Level
 - Suspense Counts
 - Funding Distribution Status**
 - PET Reports
 - Suspense Reports
 - Paycheck Distribution
 - Payroll Expense Transfers
 - PET Jobcode Sweep History
 - Position Funding History
- Job Information
- Payroll and Time Collection
- Personal Information

Funding Distribution Status

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

Report Request Parameters

DeptID: (Leave blank for all departments)

As Of Date:

Funding Status

Approved Rejected All Statuses

Proposed No Action Taken

For the purpose of running monthly and meeting the Payroll Deadline select Proposed

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

Time Collection (TC)

- Time Entry Roster -
Run report following entry of Time Collection Batch for the pay period, which should be done well before the payroll deadline
- Time Entry - One Time Pay (if applicable)

MON	TUES	WED	THURS	FRI	SAT/ SUN
					1
2	3	4	5	6	7
					8
9	10 TC	11	12 TC	13	14
					15
16	17	18	19	20	21
					22
23	24 TC	25	26	27	28
					29
30	31				

Plan carefully to allow time for your approver to review your entries before the approval deadline

After Payroll Processing (AP) ■

- Run prior to Pay End Date
- Payroll Register or Payroll Register Accounting (which displays Speedtypes)
- Leave Accrual

MON	TUES	WED	THURS	FRI	SAT/ SUN
					1
2	3	4	5	6	7
					8
9	10	11	12	13	14
					15
16 AP	17	18	19	20	21
					22
23 AP	24	25	26	27	28
					29
30 AP	31				

Reports Throughout the Year

September – Start of semester

Personnel Roster
 Department Org Report
 Emergency Contact
 Contract Pay

January 2007						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February 2007						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

March 2007						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

November – Prior to W2 Mailing

Personal Data Worksheet

April 2007						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

May 2007						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

June 2007						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

January – Start of semester

Personnel Roster
 Department Org Report
 Emergency Contact
 Contract Pay

July 2007						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

August 2007						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

September 2007						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

April – Prior to Open Enrollment

Personal Data Worksheet
 Emergency Contact

October 2007						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

November 2007						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

December 2007						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June – Following salary uploads

Personnel Roster

Reports Throughout the Year

Personnel Roster – Sept/Jan/June

- Verify salary upload information in June



<u>Employee Status</u>	<u>Approval Status</u>	<u>JobCode & Description</u>	<u>FTE</u>	<u>% of Time</u>	<u>Reg/Temp</u>	<u>FLSA Status</u>	<u>Std Hours</u>	<u>Comp Amt</u>	<u>Comp Freq</u>	<u>Appoint End Date</u>
Active Current	Approved 07/01/2005	1105 Instructor	1.00	100.00	Regular	X	40.00	\$4,465.08	Monthly	
Active Current	Approved 07/01/2005	1310 Professional Research Asst	0.00	100.00	Regular	X	40.00	\$2,975.00	Monthly	
Active Current	Approved 07/19/2005	1310 Professional Research Asst	0.80	80.00	Regular	X	32.00	\$2,132.04	Monthly	
Active Current	Approved 07/01/2005	1438 Regular Fellow	1.00	100.00	Regular	X	40.00	\$3,033.33	Monthly	08/31/2006

Department Org Report

- Run by Department, Campus or Personnel Group
- Run at beginning of each semester
- It is very important to keep your employee rosters updated to reflect the correct department ID –other CU systems reference this information

My Favorites

Reports and Reviews

- Auditing
- Classified Staff Reports
- Financial Aid Reports
- Funding and Suspense

Job Information

- Benefits with No Earnings
- Contract Pay
- Employees on Leave of Absence
- End Of Appointment
- Job Status
- Personnel Actions
- Personnel Actions HSC
- Personnel Actions History
- Personnel Roster
- Salary History by Department
- Salary History by Employee
- Salary Planning Table
- Temporary Employees
- Job List
- Job Summary
- Work Study
- Leave Accrual Summary
- Department Org Report

Dept Org Report

Run Control ID: II

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

Departmental Organization Report Parameters:

Select either Campus or Department: (if department is entered, campus is ignored)

Department: 51000

Campus: [Dropdown]

Personnel Group: [Dropdown] (Optional)

Note: Only the depts that you have access to will be printed

Save Return to Search Notify Add Update/Display

Department Org Report

- Uses “Reports To” and “Appointing Authority” fields to create the organizational structure of department.
- If report shows an incorrect relationship, it is fixed in the Position Data sections for the Employee.
- Reports To is required; Appointing Authority is recommended.

```
Report ID: PER489CU                                PeopleSoft
                                                    DEPARTMENTAL ORGANIZATION REPORT
                                                    Page No. 1
                                                    Run Date 03/26/2008
                                                    Run Time 14:35:24

Report Parameters: Department: 51000 Personnel Group: Classified
Department: 51000 Payroll & Benefit Services

EMPLOYEE NAME          SUPERVISOR NAME          APPOINTING AUTHORITY NAME
  TITLE & POSITION      TITLE & POSITION          TITLE & POSITION

-----
Abrams, Fred J         Affleck, Lisa C
Temporary Aide-00672304 Director-Exmpt Prof-00636458

Ancell, Maryellen M   Affleck, Lisa C         Stanker, Mark Thomas
Temporary Aide-00668743 Director-Exmpt Prof-00636458 Asst Vice President-00551140
```

Personal Data Worksheet

- Run by Empl ID, Department ID or for specific Job Code Series
- Run prior to W2 mailing – November
- Run prior to Open Enrollment and before employees leave for the summer - April



Search: [»](#)

- ▶ My Favorites
- ▼ Reports and Reviews
 - ▶ Auditing
 - ▶ Classified Staff Reports
 - ▶ Financial Aid Reports
 - ▶ Funding and Suspense
 - ▶ Job Information
 - ▶ Payroll and Time Collection
- ▼ Personal Information
 - [Campus Box Table](#)
 - [Emergency Contacts](#)
 - [Employee Birthdays](#)
 - [Employee Home Address Listing](#)
 - [IG Dates](#)
 - [Passport/Visa Expiration](#)
 - **[Personal DataWorkSheet](#)**
 - [Internal Resume](#)
- ▶ Position
- ▶ Recruiting
- ▶ Training
- ▶ Recruiting
- ▶ Workforce Administration
- ▶ Benefits
- ▶ Compensation
- ▶ Time Collection

Personal DataWorksheet

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

Report Parameter

EmplID: Department:

Include Terminated Employees

Jobcode Series (leave blank for all): [Find](#) First 1 of 1 Last

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

Research Reports

- Admin Training Report
- Vacant Position Report
- Employee Compensation
- Incumbent History
- Audit Reports
 - Personnel Actions Audit
 - Time Entry Audit



Admin Training Report

Parameters

- Specific job code or a single employee
- Particular personnel group, or all of them
- Select a date range or leave blank
- One or more departments
- One or more courses

Admin Training

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

Limit report as needed by adding each selection criteria

Campus: Job Code:

EmpID:

Campus Subgroup:

Select date range for course end date (leave blank for all)

From Date: End Date:

Personnel Groups (leave blank for all groups): [Find](#) First 1 of 1 Last

Department (leave blank for all departments): [Find](#) First 1 of 1 Last

Course (choose one to six courses): [Find](#) First 1 of 1 Last

Personnel Actions Audit

Lists all rows of compensation changes in Job Data – use as a compensating control for incompatible access

Runctl Per620

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

Limit report as needed by adding each selection criteria

Campus: Job Code:

EmpID:

Department: 51000 Payroll & Benefit Services

Select Approval Date Range (leave blank for all)

From Date: 10/01/2006 End Date: 10/31/2006

Include Terminated Employees Entered & Approved by Same ID

Approver EmpID:

Entered by EmpID:

Jobcode Series (leave blank for all): Find First 1 of 1 Last



Time Entry Audit

Displays entries that override approved compensation in Job Data – use as a compensating control for incompatible access



University of Colorado

Menu

Search: [] []

- My Favorites
- Reports and Reviews
 - Auditing
 - Personnel Actions Audit**
 - Time Entry Audit**
 - Classified Staff Reports
 - Financial Aid Reports
 - Funding and Suspense
 - Job Information
 - Payroll and Time Collection
 - Personal Information
 - Position
 - Recruiting
 - Training
- Recruiting
- Workforce Administration
- Benefits
- Compensation
- Time Collection
- Payroll for North America
- Workforce Development
- Organizational Development
- Enterprise Learning
- Workforce Monitoring
- Set Up HRMS
- Enterprise Components
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
- Packaging
- My Personalizations
- My System Profile

Runctl Per621

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

Limit report as needed by adding each selection criteria

Campus: [] Job Code: []

EmplID: []

Department: 51000 Payroll & Benefit Services

Pay Group: []

Earnings Code: []

Select Pay Period End Date Range (leave blank for all)

From Date: 10/01/2006 End Date: 10/31/2006

Include Terminated Employees Entered & Approved by Same ID

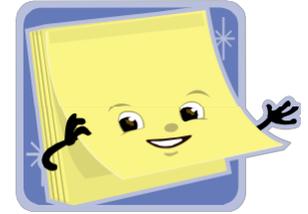
Approver EmplID: []

Entered by EmplID: []

Jobcode Series (leave blank for all): [] Find First 1 of 1 Last

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

Wrapping it up...Reminders



- Refer to Reviews and Report Resource Guide
- Use Review Pages for “snapshots”
- Use Reports to capture larger amounts of data
- Follow date guidelines using Payroll Calendar and mark your personal calendar for reports throughout the year
- Send us your feedback

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