8.9 HRMS Step by Step Guide
Running HRMS Reports

Overview: This guide provides instruction for running reports in HRMS. Recommended reports and reviews are available to HRMS users under the Reports and Reviews menu. The reports and reviews are then grouped by HRMS process under the following menu items:

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

Many reports have run control options or parameters, such as From and To Dates, SpeedTypes, Position Numbers, Employee IDs, Department IDs, etc. All reports may be viewed online, printed at the user's printer, and/or downloaded to Excel. All reports are available in Production. In addition, these reports are available for running in the HR Reporting database, which is a copy of the previous day's HR Production database, when Production is unavailable.

This Step by Step guide provides an example of running the Personnel Roster Report. The process will apply to all other reports; however, the run control options may vary by report. The Personnel Roster displays employees in alpha order, by position number or job code. It includes employees on Leave With Pay or Leave Without Pay status, but excludes Terminated and Short Work Break employees.

For a complete list of reports and reviews available in PeopleSoft 8.9, go to the 89HRMS Report and Review Resource Guide.

Note: The screen shots used in this guide may not be representative of your access.

1. Navigate to Reports and Reviews

- ☐ Reports and Reviews
- ☐ Click on

  ▷ Job Information

2. Job Information Reports are displayed

☐ Click on Personnel Roster

3. Personnel Roster search page displays

☐ Click on Search to find an existing run control ID
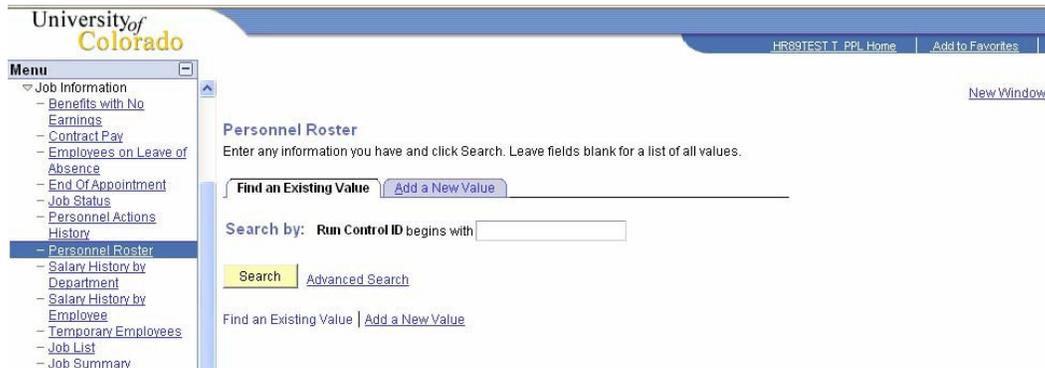
4. Search Results display

☐ Click on an existing Run Control ID or create a new ID

☐ To create a new ID, Click on Add a New Value
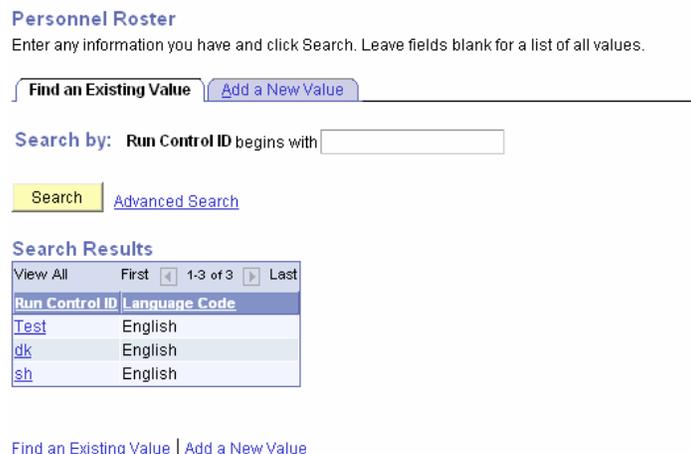
5. Add a New Value page displays

☐ Enter a new Run Control ID.

NOTE: Spaces are not valid.

☐ Click on [Add]

6. Personnel Roster Run Control page displays

☐ Enter a Dept ID from the Look Up list 🔍 or leave blank to run for all departments (Based on row level security)

☐ Select Sort Option ⊙

☐ Click [Run]

7. Process Scheduler page displays

☐ Enter *PSUNX* in the Server Name

☐ Verify the report type is Web and format is PDF (may also be CSV for report use in Excel)

☐ Click [OK]
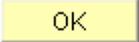
8. Personnel Roster page re-displays

☐ Click on Report Manager

9. Report Manager displays

- The report will not display until the process status is Posted
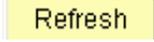
- Click [Refresh] until the report is Posted

- Click on the report Description
Personnel Roster Report
(If a new window does not open, hold down the Ctrl key and click again)

10. Personnel Roster Report displays in Adobe Acrobat

- Click 🖨 to print the report

- Click [Save a Copy] to save the report

Running HRMS Reports complete