



University of Colorado
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HRMS 8.9 Reports & Reviews Resource Guide

Recommended reports and reviews are listed by menu item which are located in PeopleSoft 8.9 under the Reports and Reviews menu. Please send questions to employeeservices@cu.edu

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Auditing

Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
Personnel Actions Audit	Use to audit transactions entered and approved by the same user. Intended as a compensating control mechanism for incompatible access users. Tracks compensation change information in Job Data; such as hires or pay rate changes.	<i>HOME>Reports and Reviews > Auditing >Personnel Actions Audit</i>	Monthly by reviewers or as needed	Prod/ Rptg CSV
Time Entry Audit	Information on Time Collection batches entries that override approved compensation rates, are in addition to compensation in Job Data or have been entered and approved by the same user. Shows overrides of hourly rates, but not vacation or sick leave usage. Intended as a compensation control mechanism for incompatible access users.	<i>HOME>Reports and Reviews > Auditing >Time Entry Audit</i>	Monthly by reviewers or as needed	Prod/ Rptg CSV

Funding and Suspense

Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
Employee Job Data – Fund Distribution	Indicates whether position and job data match for an employee. Displays salary, appointment end date, status, action, job and funding approval status, etc. Includes future-dated rows when there are multiple job codes within the same Empl record #. Includes employee job history, and an option to choose terminated employees. If an employee has multiple jobs in different departments, they are listed on separate pages for each department. Must run by Empl ID for this functionality to work otherwise, will show only the jobs located in that department.	<i>HOME> Reports and Reviews > Funding and Suspense > Employee Job Data - Fund Distribution</i>	As needed	Prod/ Rptg PDF
Funding Distribution - DeptID	Past, current, and future funding distributions for positions by SpeedType/FOPPS for department.	<i>HOME> Reports and Reviews > Funding and Suspense > Funding Distribution - DeptID</i>	As needed	Prod/ Rptg PDF
Funding Distribution - PosNo	Past, current, and future funding distributions for positions	<i>HOME> Reports and Reviews > Funding and Suspense > Funding Distribution - PosNo</i>	As needed	Prod/ Rptg PDF
Funding Distribution Status	Select status of approved, proposed, or rejected. Displays current and future funding distribution information for an employee.	<i>HOME> Reports and Reviews > Funding and Suspense > Funding Distribution Status</i>	A few days prior to payroll deadline	Prod/ Rptg PDF
PET Reports – PET Report - Detail	Payroll Expense Transaction accounting detail. Run by Payroll Expense Transfer ID and Journal date.	<i>HOME> Reports and Reviews > Funding and Suspense>Run > PET Reports > PET Report - Detail</i>	As needed	Prod/ Rptg



Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
PET Report - Summary	Payroll Expense Transaction accounting summary. Run by Payroll Expense Transfer ID and Journal date.	<i>HOME> Reports and Reviews > Funding and Suspense>Run > PET Reports > PET Report - Summary</i>	As needed	Prod/ Rptg
Suspense Reports – Summary Report	Run Summary Report alone or run any or all 5 reports at the same time. Summary Report produces a list of department employees for a given time period that have all or part of their funding go into suspense. Provides position number, Empl id, Empl record #, salary & benefits eligibility info on each employee, & why their funding will go into suspense.	<i>HOME> Reports and Reviews > Funding and Suspense > Run > Summary Suspense Report</i>	Early each month to avoid suspense	Prod/ Rptg PDF
Suspense Reports – Funding Not Approved	Provides information for all positions whose funding is not approved. Allows department to follow up on pending/unapproved funding distribution transactions to avoid suspense issues.	<i>HOME> Reports and Reviews > Funding and Suspense > Run > >Run>Funding Not Approved</i>	As needed	Prod/ Rptg PDF
Suspense Reports – No Current Funding	Lists positions with no current funding distribution lines within the time parameters requested. Run to determine the funding gap prior to payroll deadlines to avoid suspense problems.	<i>HOME> Reports and Reviews > Funding and Suspense > Run > No Current Funding</i>	As needed	Prod/ Rptg PDF
Suspense Reports – Funding End Date < Appt End Date	Shows when funding end dates are prior to appointment end dates. Pulls the current row of funding & checks against the current row of job data to see if the end dates are different.	<i>HOME> Reports and Reviews > Funding and Suspense > Run > Funding End Date<Appt End Date</i>	As needed	Prod/ Rptg PDF
Suspense Reports – Break in Funding Distribution	Lists positions that have a break in funding within set time parameters. Ex. The prior row ends on 04/30/05 and new funding row doesn't start until 05/04/05. Run to determine the funding gap so it can be corrected early in the month prior to payroll deadlines.	<i>HOME> Reports and Reviews > Funding and Suspense > Run > Break in Funding Distribution</i>	As needed	Prod/ Rptg PDF
Paycheck Distribution Review	An employee's paycheck amounts and distributions for deductions and taxes for a selected pay end date.	<i>HOME> Reports and Reviews > Funding and Suspense > Paycheck Distribution</i>	As needed	Prod/ Rptg
Payroll Expense Transfers	Online review of Batch Payroll Expense Transfers provides summary and detail accounting information.	<i>HOME> Reports and Reviews > Funding and Suspense >Payroll Expense Transfers</i>	As needed	Prod/ Rptg
PET Jobcode Sweep History	Online review of PET transfer information of changes to job codes and positions.	<i>HOME> Reports and Reviews > Funding and Suspense >PET Jobcode Sweep History</i>	As needed	Prod/ Rptg
Position Funding History	All iterations of funding for a position, including PET transactions and lines marked as "No Action Taken." This page will include all FOPPS that have ever been in place for the position.	<i>HOME> Reports and Reviews > Funding and Suspense > Position Funding History</i>	As needed	Prod/ Rptg



Job Information

Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
Benefits with No Earnings	Lists employees who are receiving benefits but no salary from the University. Run this report by campus or department and include a pay end date range.	<i>HOME> Reports and Reviews > Job Information > Benefits with No Earnings</i>	As needed	Prod/ Rptg PDF
Contract Pay	(Used by UCB & UCDHSC) - Provides history, current, and future information for employees in a contract pay status, for contract dates, contract type, payment dates, and compensation amount.	<i>HOME> Reports and Reviews > Job Information > Contract Pay</i>	After System Uploads, at start of each semester and as needed	Prod/ Rptg PDF
Employees on Leave of Absence	Lists employees on leave, the type of leave and leave begin and expected return dates by department.	<i>HOME> Reports and Reviews > Job Information > Employees on Leave of Absence</i>	As needed	Prod/ Rptg PDF
End of Appointment	Lists employees who have appointments ending within the next 10, 30 or 60 days, or expired appointments. Use information to extend appointment or terminate employee as necessary. Also used to identify employees who will be placed on Short Work Break (not paid).	<i>HOME> Reports and Reviews > Job Information > End of Appointment</i>	Monthly	Prod/ Rptg PDF
Job Status	Provides status of current and future job transactions (Approved, Proposed, Rejected) for employees by Dept ID or Job Code. Allows for follow-up on pending job data transactions.	<i>HOME> Reports and Reviews > Job Information > Job Status</i>	Prior to Payroll deadline	Prod/ Rptg CSV
Personnel Actions History	Lists employees with selected job actions and reasons for specified time period, including position #, job status, effective date, action reason, name, employee ID, action date, job code and comp rate.	<i>HOME> Reports and Reviews > Job Information > Personnel Actions History</i>	As needed	Prod/ Rptg PDF
Personnel Roster	Employees in alpha order, by posn # or job code. Includes employees on Leave With Pay or Leave Without Pay status, but excludes Terminated and Short Work Break employees. Displays future-dated rows; use to review salary information after the salary upload takes place each year.	<i>HOME> Reports and Reviews > Job Information > Personnel Roster</i>	Beginning of each semester, and as needed	Prod/ Rptg PDF
Salary History by Department	Salary history for a department, based on a SetID for employee groups during a specified time period.	<i>HOME> Reports and Reviews > Job Information > Salary History by Department</i>	As needed	Prod/ Rptg PDF
Leave Accrual	Leave accrual totals for employees by Department for current month.	<i>HOME> Reports and Reviews > Job Information > Leave Accrual</i>	After Payroll	Prod/ Rptg PDF



Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
Salary History by Employee	Salary history for an employee during a specified time period.	<i>HOME> Reports and Reviews > Job Information > Salary History by Employee</i>	As needed	Prod/ Rptg PDF
Temporary Employees	Classified temporary staff and other temporary employees with hire date, job title, comp rate and frequency. Includes the 6100 series, and omits students.	<i>HOME> Reports and Reviews > Job Information > Temporary Employees</i>	As needed	Prod/ Rptg PDF
Job List Review	Lists all current and future dated jobs for a specific employee, including positions in all departments and across campuses. Used to coordinate a job action with another unit. Only way a department can find out all positions an employee holds within the University.	<i>HOME> Reports and Reviews > Job Information > Job List</i>	As needed	Prod/ Rptg
Job Summary	Lists job(s) held by a specific employee and displays up to six job data rows of on one page. Lists all administrative actions for an employee. Includes pay rate changes, disciplinary actions, leaves of absence, promotions, transfers, etc. A summary of any changes entered in the Job Data pages is displayed, consolidating information on the employee's job record.	<i>HOME> Reports and Reviews > Job Information > Job Summary</i>	As needed	Prod/ Rptg
Work Study Review	Lists current work study info for an employee. Use to track availability of work study funds and/or balance available. Lists effective date and end date of award, account code, type of work study, work study limit, above limit balance, unconfirmed (input but not paid) earnings, and confirmed (paid) earnings. NOTE: Updated every pay period.	<i>HOME> Reports and Reviews > Job Information > Work Study</i>	As needed	Prod/ Rptg
Leave Accrual Summary Review	Provides summary and detail on leave accrual and totals for employees including historical amounts accrued prior to the implementation of PeopleSoft in July 2000	<i>HOME> Reports and Reviews > Job Information > Leave Accrual Summary</i>	As needed	Prod/ Rptg
Department Org Report	Provides a of all employees in a department with each employee's direct supervisor (Reports_To) and appointing authority.	<i>Home>Reports and Reviews>Job Information>Department Org Report</i>	As needed	Prod/Rptg PDF



Payroll and Time Collection

Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
Employee Compensation	Run for department or a single employee for specific pay begin and end dates. Lists (by Earnings Code, Speed Type and Account) employee compensation amounts, position # and job code.	<i>HOME> Reports and Review > Payroll and Time Collection > Employee Compensation</i>	As needed	Prod/ Rptg PDF
Leave Balance – Termed EE	Displays sick and vacation balances for retired or terminated employees.	<i>HOME> Reports and Review > Payroll and Time Collection > Leave Balance – Termed EE</i>	After Payroll	Prod/ Rptg PDF
Overtime	Lists overtime hours by campus or department for a specific year and/or quarter.	<i>HOME> Reports and Review > Payroll and Time Collection > Overtime</i>	As needed	Prod/ Rptg PDF
Payroll Register	Employees being paid, hours worked, gross pay by specified pay group. Verify employees being paid each pay cycle (pay date). Identify over and underpayments, no pays, etc. For discrepancies, <u>alert PBS immediately</u> so corrections can be made prior to the pay date. NOTE: Does not include Expense Transfers.	<i>HOME> Reports and Review > Payroll and Time Collection > Payroll Register/Payroll Register Accounting</i>	Immediately after BW and/or EOM payroll is run	Prod/ Rptg PDF
Payroll Register/Payroll Register Accounting	Similar to the Payroll register with Accounting information. Accounting Report shows account code information for each earnings row. NOTE: Does not include Expense Transfers.	<i>HOME> Reports and Review > Payroll and Time Collection > Payroll Register/Payroll Register Accounting</i>	Immediately after BW and/or EOM payroll is run	Prod/ Rptg PDF
Time Entry	Hours and/or amounts by employee and earnings code for current pay period. Use to verify that data input is correct for each employee.	<i>HOME> Reports and Review > Payroll and Time Collection > Time Entry</i>	After time entry, before Payroll deadline	Prod/ Rptg PDF
Time Entry (One Time Pay)	Employees with a one-time payment for the current pay period. Use to verify that data input is correct for each employee.	<i>HOME> Reports and Review > Payroll and Time Collection > Time Entry (1 Time Pay)</i>	After time entry, before Payroll deadline	Prod/ Rptg PDF
Time Entry Archive	Lists the same data as the Time Entry report except this report is for previous pay periods.	<i>HOME> Reports and Review > Payroll and Time Collection > Time Entry Archive</i>	As needed	Prod/ Rptg PDF
Time Entry Archive (1 Time Pay)	Lists the same data as the Time Entry (1 Time Pay) report except this report is for previous pay periods.	<i>HOME> Reports and Review > Payroll and Time Collection > Time Entry Archive (1 Time Pay)</i>	As needed	Prod/ Rptg PDF
Employee Compensation History	Lists compensation history for employee selected. Information includes action reasons, compensation rate, compensation frequency, entry date, and years at current rate.	<i>HOME> Reports and Reviews > Payroll and Time Collection > Employee Compensation History</i>	As needed	Prod/ Rptg



Personal Information

Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
Campus Box Table	The Campus Box Table report associates a department with campus boxes.	<i>HOME> Reports and Reviews > Personal Information > Campus Box Table</i>	As needed	Prod/ Rptg PDF
Emergency Contacts	Emergency contact for employees. Choose active, terminated, or all employees.	<i>HOME> Reports and Reviews > Personal Information > Emergency Contacts</i>	Beginning of each semester, and as needed	Prod/ Rptg PDF
Employee Birthdays	Lists employee birthdays for department.	<i>HOME> Reports and Reviews > Personal Information > Employee Birthdays</i>	As needed	Prod/ Rptg PDF
Employee Home Address Listing	Complete list of all employees' home addresses and home phone numbers. Select "Active," "Terminated," or "All" employees.	<i>HOME> Reports and Reviews > Personal Information > Employee Home Address Listing</i>	As needed	Prod/ Rptg PDF
I9 Dates	Lists employees with expiring I-9 or no I-9 information by Department ID.	<i>HOME> Reports and Reviews > Personal Information > I9 Dates</i>	As needed	Prod/ Rptg PDF
Passport/Visa Expiration	Provides a list of employees by EmplID with the country, passport #, issue data and expiration date.	<i>HOME> Reports and Reviews > Personal Information > Passport/Visa Expiration</i>	As needed	Prod/ Rptg PDF
Personal Data Worksheet	Run by Dept ID, Empl ID, or Job Code Series. Lists employee personal data (name, address, phone #'s, etc.) on Personal Data pages. Used for the employee to update address changes and other personal data information.	<i>HOME> Reports and Reviews > Personal Information > Personal Data Worksheet - DeptID</i>	April/Sept/Nov	Prod/ Rptg PDF
Internal (Employee) Resume	Creates a resume of internal applicants (employee) data in system.	<i>HOME> Reports and Reviews > Personal Information > Internal Resume</i>	As needed	Prod/ Rptg PDF



Position

Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
Active/Inactive Positions	Current position data for active and/or inactive positions.	<i>HOME> Reports and Reviews > Position >Active/Inactive Positions</i>	As needed	Prod/ Rptg PDF
Active Position History	Current and historical position related data for active positions.	<i>HOME> Reports and Reviews > Position >Active Position History</i>	As needed	Prod/ Rptg PDF
Incumbent History	Current and former incumbents by name with entry, exit dates, starting and ending salaries.	<i>HOME> Reports and Reviews > Position >Incumbent History</i>	As needed	Prod/ Rptg PDF
Positions by Speed Type	Lists all positions having the specified SpeedType. Use to locate positions that show up in your dept SpeedType that do not belong.	<i>HOME> Reports and Reviews > Position >Positions by SpeedType</i>	As needed	Prod/ Rptg PDF
Position Status	Run by job code or job code series. Lists positions by status (approved, proposed, rejected.) Use to determine final status of proposed position changes and to follow up on pending position transactions.	<i>HOME> Reports and Reviews > Position > Position Status</i>	A few days prior to payroll deadline	Prod/ Rptg PDF
Vacant Position Report	Lists all vacant positions by department.	<i>HOME> Reports and Reviews > Position >Vacant Position Report</i>	As needed	Prod/ Rptg PDF
Position Summary	List of all actions for a specific position. Includes information such as effective date, action reason, job code, department, employee type and standard hours.	<i>HOME> Reports and Reviews > Position > Position Summary</i>	As needed	Prod/ Rptg
Position History Review	Lists current incumbent and prior employees who occupied a position. Includes entry and exit date, exit reason, compensation rate, employee name and ID. Includes a button that links to current information about the position.	<i>HOME> Reports and Reviews > Position >Position History</i>	As needed	Prod/ Rptg
Position Status Review	Lists current information for a position, including job code, title, department, status, status date, headcount, and current incumbent data	<i>HOME> Reports and Reviews > Position >Position Status</i>	As needed	Prod/ Rptg
Position Commitment	Captures the data entered on the position Description page for faculty/exempt professionals: proposed costs, new position, moving expenses, projected salary.	<i>HOME> Reports and Reviews > Position >Position Commitment</i>	As needed	Prod/ Rptg PDF
Budget Status	This review provides a budget status summary by position. Search by department, job code, position, etc.	<i>HOME>Reports and Reviews > Position >Budget Status</i>	As needed	Prod/ Rptg



Recruiting

Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
Candidate Listing	Lists candidates for a specific Job Requisition. Combines pertinent job requisition and candidate (applicant) contact information.	<i>HOME > Reports and Reviews > Recruiting > Candidate Listing</i>	As needed	Prod/ Rptg CSV
Job Requisition Information	Provides job requisition and general position information.	<i>HOME > Reports and Reviews > Recruiting > Job Requisition Information</i>	As needed	Prod/ Rptg PDF

Training

Report/Review Name	Report Description	PeopleSoft Navigation	When to Run	Report Location & Type
Admin Training	Enables departments to look up multiple courses and provides a list of employees that have taken the course(s).	<i>HOME > Reports and Reviews > Training > Admin Training</i>	As needed	Prod/ Rptg PDF
Student Training History	Enables departments to look up training records for an individual employee	<i>HOME > Reports and Reviews > Training > Student Training History</i>	As needed	Prod/ Rptg PDF
Review Training Summary	Lists all completed courses for the selected employee. Displays Course, Title, Session Number, Start Date, and End Date	<i>HOME > Reports and Reviews > Training > Review Training Summary</i>	As needed	Prod/ Rptg