3270 QUERY to HRS MAPPING
For BUDGET RELATED DATA

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UW System Administration
Office of Budget and Planning
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When in WORD, to quickly advance to a specific section of this document, place curser on the section name, hold down Ctrl key and left click.
1. Introduction

The purpose of this document is to provide a basic explanation of where information from previous Budget 3270 transactions can now be found on the Human Resources System (HRS).

For each 3270 transaction, this document explains where to navigate in HRS to find similar information, a visual comparison of the HRS side and the 3270 screen is displayed, and the information equivalents are pointed out. Some screen data such as person name, employee ID and department has been changed to imaginary equivalents or blurred-out for confidentiality.

In an attempt to keep instructions as simple as possible, this document will not get into all the details of the HRS screens.

In this document are references to “*Navigation tip: When you get here, add this to your Favorites if you have not already done so.” Follow this tip to quickly jump to the HRS screens you commonly will use, rather than drilling down through multiple menu layers. Section 10. Navigation Tips, will explain how to “....add this to your Favorites”. Also in the navigation tips is how to find a navigation path through the SEARCH function on the Oracle Menu.

For most queries listed in this document, log into HRS production. A few may use the EPM website or the Interactive Reporting (IR) site. The instructions will point out the exceptions to you.

- HR Production On-line screens, reports, and queries: [https://www.hrs.wisconsin.edu/login](https://www.hrs.wisconsin.edu/login)
- EPM Production queries: [https://www.epm.wisconsin.edu/login](https://www.epm.wisconsin.edu/login)
  HR and EPM Contact: HRS Support Center, 855-4UW-SUPP or 608-890-1501
- Interactive Reporting (IR) query: [https://bi2.fastar.wisconsin.edu/workspace](https://bi2.fastar.wisconsin.edu/workspace)
  IR Contact: Kathy Luker at 608-265-3761, kwluker@wisc.edu
2. Data Security – what you may or may not be able to view

Ask for ok to security info from Kay’s and Cathy’s paper.
The menus that will be presented to you and even the data that you can view will depend on the roles for which you are authorized, as well as your “row level” security.

In HR Production, row level security applies. Row level security gives a user access at the department, division, campus, or system-wide level. For example, if a user has campus level security, a user can only see job information for people with jobs within the user’s campus. A search for the employee will return a “No matching values were found” response.

Row level security currently defaults to department level, but can be requested at a higher level. To request a higher level of security, consult your campus site lead. At the department row level, data will be masked or unavailable if the user’s department does not match the employee’s job department.

The explanations and examples below are taken from PEOPLESOFT HRS SUMMARY INQUIRIES, by Kay Schoenherr, 04JAN2011.

In the examples below, the user has row level security for division A48 (Letters and Science) at UWMSN only.

The employee has 2 jobs: one at UWMSN in Dept A482600 (French & Italian); and one at UWEAU, Dept C034001 (Vice Chancellor for Student Affairs, Gear Up Program).

Empl Rcd #0 is the UWMSN assignment.
Empl Rcd #1 is the UWEAU assignment.

Note: The Job Data hyperlink may appear as if it is active for all rows below. However, the Job Data hyperlink is dependent on a user’s row level security. In our example, the Job Data hyperlink will only work for rows containing Empl Rcd #0 (e.g. UWMSN) information.
On the **Workforce Job Summary, Salary Plan** tab, notice that the UWEAU Empl Rcd #1 shows “XX’s” in some of the fields. The data is masked due to the user’s row level security.

On the **Workforce Job Summary, Compensation** tab, the UWEAU Empl Rcd 1 shows all 9’s in some fields, due to the user’s row level security.

On the **Workforce Job Summary, Compensation** tab, you can click on the **Components** hyperlink only for the UWMSN Empl Rcd 0 job, but not the UWEAU Empl Rcd 1 job.

EPM and IR data viewing is limited by security role, which includes whether the user is limited to viewing only “non-sensitive” information. There is no restriction on who you can see, but information such as Home Address, ethnicity, social security number, may be considered sensitive information and not available to most users.
3. APPI / HRS Job Data Query

APPI 3270 Screen

DOE, JANE L                                      AS OF 07 12 11                                      APPI PAGE 1
APPT ID 01234567                                PERS ID 00298765                                SENIORITY:

APPT BEGIN DATE 08 26 2009 01 - (NEW APPOINTMENT) PRIOR LOC A TYPE AS BRK N
APPT END DATE                                      NEXT LOC
LAST WORK DATE                                    LENGTH MONITOR

APPT TYPE: FA (FACULTY)                         TITLE: C40NN (ASSISTANT PROFESSOR)
BASIS C RATE 45850                                UW MF%

CONTINUITY 01 (ON-GOING)                        SEASONAL
FLSA E (EXEMPT)

MAJOR DEPT Q321456 (UW-MNT/PSYCHOLOGY)          TOTAL APPT %  0.000
                                                   TOTAL LEAVE %  0.000

BACKUP FOR APPT

NEXT ______________________________________      TP EXIT _______

YOUR LAST REQUEST WAS 01365762 07-12-11
1=CHGT 2=APCT 3=APPR 4=APRH 5=APDT 6=CHGA 7=CHGR 8=DEPT 9=+1 10=+1 11=EXIT

APPI: Appointment Inquiry

The Appointment Inquiry displays information for one selected appointment as of a requested date.

The most detailed place to find the information that appeared in the APPI query is on the HRS Job Data screens. It will display the most current information. Historical information can be retrieved if needed.
HRS Menu Navigation:

*Navigation tip: When you get here, add this to your Favorites if you have not already done so.

Enter your search criteria. If you know the EmplID (formerly Person ID), use it.

Check “Include History” box if you want to see the changes to an appointment over time, or else only the most current info will be returned.

Click on Search box or hit Enter key.

If there are multiple appointments, a selection list is returned. Otherwise you will be taken directly to the Job Data screen.

If a list is returned, select a result and click on it.
### Job Data: HRS Work Location Tab

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPT ID</td>
<td>01234567</td>
</tr>
<tr>
<td>PERS ID</td>
<td>00298765</td>
</tr>
<tr>
<td>APPT BEGIN DATE</td>
<td>08/26/2009 01- (NEW APPOINTMENT)</td>
</tr>
<tr>
<td>APPT END DATE</td>
<td>NEXT LOC</td>
</tr>
<tr>
<td>LAST WORK DATE</td>
<td>LENGTH MONITOR</td>
</tr>
<tr>
<td>APPT TYPE</td>
<td>FA (FACULTY)</td>
</tr>
<tr>
<td>TITLE</td>
<td>C40NN (ASSISTANT PROFESSOR)</td>
</tr>
<tr>
<td>BASIS</td>
<td>C</td>
</tr>
<tr>
<td>RATE</td>
<td>45850</td>
</tr>
<tr>
<td>CONTINUITY</td>
<td>01 (ON-GOING)</td>
</tr>
<tr>
<td>FLSA</td>
<td>E (EXEMPT)</td>
</tr>
<tr>
<td>MAJOR DEPT</td>
<td>Q321456 (UW-MNT/PSYCHOLOGY)</td>
</tr>
<tr>
<td>TOTAL APPT %</td>
<td>0.000</td>
</tr>
<tr>
<td>TOTAL LEAVE %</td>
<td>0.000</td>
</tr>
</tbody>
</table>

- The new APPT ID is equal to the last 6 digits of HRS employee ID + 2 digit employer record number; for this example, the Budget appointment ID would be 29876500
- If an expected end date exists, it is shown; the actual termination date is listed separately
- Look at Action to see if person is on break

Other useful information on the HRS Work Location tab, shown in green ovals:
- Status of appointment, the last Action taken, the Effective Date of the action, and the action Reason
- Payroll Status and Job Indicator (ex.: primary job, secondary job), Expected Job End Date
- Position Number, Title description

---

A date of 02/10/2011 is the migration date to the new HR System. Obtaining the original entry date is explained on the next page.
• Employment Data: At the bottom of any of the Job Data tabs, click on **Employment Data**

This opens an HRS Employment Information screen:

![Employment Data Screen Screenshot]

- The Employment Data screen will show you the original start date. This is equivalent to **APPT BEGIN DATE** on the 3270 APPI screen. This is useful if the HRS Work Location tab showed the migration date in the Position Entry Date; if the person started after migration, the Work Location tab will show the original start date.
- **Adj Cont Service Date** shows the classified seniority date.

![Employment Data Screen Screenshot]

At the bottom of the HRS Employment Data screen, click on **Job Data** to return to the Job Data tabs.
Appointment change history: View history to see actions taken since migration to HRS.

As explained earlier, to request history from the search criteria screen, click on the Include History box:

Or from the bottom of any of the Job Data tabs, click on the Include History box:

Use the arrows at the top right of a tab screen to scroll through historical records. The most current information is displayed as the first record, the earliest as the last record. Only history since migration is shown.

02/10/2011 is the migration date to the new HR system.

The Effective Date on the HRS Work Location tab is the effective date of the change, Action will describe what changed, and Reason is the cause of the action. In this example, Effective Date 02/20/2011 is the date of migration/conversion to the new HR System, and the Reason for the Hire action is listed as the Conversion; how to find the original start date is discussed on the previous page.
### Job Data: HRS Job Information Tab

**Job Code:** C40NN ASSISTANT PROFESSOR  
**Entry Date:** 02/01/2011

#### Standard Hours

- **Standard Hours:** 40.00
- **Combined Std Hours / FTE:** 40.00 / 1.00000

#### Work Period:

- **Work Period:** WVWS, WVMS
- **FTE:** 1.00000

#### Contract #

<table>
<thead>
<tr>
<th>Contract Number:</th>
<th>Contract Type:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Next Contract Number</td>
</tr>
</tbody>
</table>

**FLSA Status:** Exempt  
**Add to FTE Actual Count?** Yes  
**Encumbrance Override** No

The items in red boxes above are equivalent to the **APPI items highlighted in yellow** below. Other useful information on the HRS Job Information tab is shown in green ovals.

---

**DOE, JANE L**  
**APPT ID 01234567**  
**PERS ID 00298765**

**Seniority:**

**APPT BEGIN DATE 08/26/2009**  
**APPT END DATE**

**Prior Loc A Type As BRK N**  
**Next Loc**  
**Last Work Date**

**APPT TYPE:** FA (FACULTY)  
**Title:** C40NN (ASSISTANT PROFESSOR)

**Basis:** C  
**Rate:** 45850  
**UWMF%**

**Continuity 01 (On-Going)**

**FLSA E (Exempt)**

**Major Dept:** Q321456 (UW-MNT/PSYCHOLOGY)

**Total Appt % 0.000**  
**Total Leave % 0.000**

---

Full/Part refers to health insurance eligibility, not FTE %.; if part-time but enough to be eligible for HI, will say “Full-Time”.

If a person has multiple active appt.s, Combined Std Hours should be a sum of the FTE and standard hours for all as of when the apt, being viewed started.
Job Data: HRS Compensation Tab

The Comp Rate, marked by the red box above, is equivalent to the APPI RATE highlighted yellow below.

- For unclassified, this is the amount earned annually or, for academic pay basis, in 9 months.
- For classified, this would show the hourly amount

Other useful information on the HRS Compensation tab, shown in green ovals:

- Frequency of payment; should match what one expects with pay basis from the Job Information tab. Academic = 9M, Annual = M, Hourly = H
- Compensation Rate is the monthly payment amount for an unclassified employee, the hourly rate for a classified employee.
### Job Data: HRS UW Custom Tab

<table>
<thead>
<tr>
<th>Work Location</th>
<th>Job Information</th>
<th>Job Labor</th>
<th>Payroll</th>
<th>Payroll*</th>
<th>Salary Plan</th>
<th>Compensation</th>
<th>UW Custom</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### UW Custom Data

- **Effective Date:** 05/26/2011
- **Effective Sequence:** 0
- **Job Indicator:** Primary Job
- **Action:** Short Work Brk
- **Reason:** End of Academic Year
- **Current**

#### Continuity Status Information

- **Continuity 01**
- **Job Security**
- **Guaranteed Length**

#### Probation

- **Probation Type:** Not Required
- **Probation End Date:**

#### Rate Exceptions

- **Under Min**
- **Over Max**

#### External Systems

- **Source System:** Other
- **Number:**

#### Encumbrances

- **Business Unit:**
- **Year:** 2011
- **Begin Date:** 08/26/2010
- **Session:** AY
- **End Date:** 06/26/2011

#### Continuity, marked by the red box above is equivalent to the APPI Continuity highlighted below.

```
DOE, JANE L                       AS OF 06 22 11          APPI PAGE 1
APPT ID 01234567                  PERS ID 00298765          SENIORITY:
APPT BEGIN DATE 08 26 2009 01 -   (NEW APPOINTMENT) PRIOR LOC A TYPE AS BRK N
APPT END DATE -                   NEXT LOC
LAST WORK DATE                    LENGTH MONITOR
APPT TYPE: FA (FACULTY)           TITLE: C40NN (ASSISTANT PROFESSOR)
BASIS C RATE 45850               UWMF%
CONTINUITY 01 (ON-GOING)          SEASONAL
FLSA E (EXEMPT)
MAJOR DEPT Q321456 (UW-MNT/PSYCHOLOGY)  TOTAL APPT % 0.000
                                         TOTAL LEAVE % 0.000
```

Other useful information on the HRS UW Custom tab, shown in green ovals:

- Rate Exceptions and Encumbrances
4. APRH / HRS Rate and Title History Query

APRH 3270 Screen

<table>
<thead>
<tr>
<th>EFF DATE</th>
<th>BASIS RATE</th>
<th>TITLE AND CHANGE REASON</th>
<th>RATE CHANGE REASON</th>
</tr>
</thead>
<tbody>
<tr>
<td>08 26 2010</td>
<td>45850</td>
<td>C40NN (ASSISTANT PROFESSOR)</td>
<td>078 (HIGH DEMAND FA)</td>
</tr>
<tr>
<td>01 10 2010</td>
<td>44000</td>
<td>C40NN (ASSISTANT PROFESSOR)</td>
<td>078 (HIGH DEMAND FA)</td>
</tr>
<tr>
<td>08 26 2009</td>
<td>43000</td>
<td>C40NN (ASSISTANT PROFESSOR)</td>
<td></td>
</tr>
</tbody>
</table>

APRH: Appt Rate & Title History Inquiry
Displays all changes in rate and title from the "as of" date back to the earliest rate and title for selected appt.

At this time, the best place to obtain rate and title changes is from the HR Job Data, as described in Section 2. APPI / HRS Job Data Query. Request “Include History” to be returned.

- Title code and description is displayed on the Job Information tab
- Rate is displayed on the Compensation tab

Rate and Title History is also available through an on-line HRS-EPM Report.
Replace Section 4. APRH / HRS Rate and Title History Query when replacement query is available

NOTE: at this writing (11/2011), this query has been reported to not be dependable. It is recommended that this query not be used at this time. A replacement query is being written, but will not be available for several months.

Backdated rate changes that cause a “ripple” change to intervening records are not correctly reported in the current query. A new data element will be added to EPM to correspond to the true rate changes that should be reported.

In addition, the results do not currently include rate change amounts.

For now, limit the use of this query only to become familiar with the EPM queries.

To use the Rate and Title History query, you must know the Empl Id and the HRS Position number of the appointment you wish to query. To get the position number, perform the HRS Job Data query described in section 0. APPI / HRS Job Data Query. Position number is on the HRS Work Location tab.

<table>
<thead>
<tr>
<th>Work Location</th>
<th>Job Information</th>
<th>Job Labor</th>
<th>Enroll</th>
<th>Payroll</th>
<th>Payroll*</th>
<th>Salary Plan</th>
<th>Compensation</th>
<th>UY Custom</th>
<th>EMP</th>
<th>ID</th>
<th>Empl Rec'd #</th>
</tr>
</thead>
<tbody>
<tr>
<td>JANE DOE</td>
<td>EMP</td>
<td>002968755</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work Location</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Status:</td>
<td>Active</td>
<td>Payroll Status:</td>
<td>Leave of Absence</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Date:</td>
<td>09/20/2011</td>
<td>Sequence:</td>
<td>0</td>
<td>Job Indicator:</td>
<td>Primary Job</td>
<td>Action:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Start Date:</td>
<td>02/10/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected Job End Date:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Date Worked:</td>
<td>05/29/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Number:</td>
<td>01234567</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NOTE: at this writing (11/2011), this query has been reported to not be dependable. It is recommended that this query not be used at this time. A replacement query is being written, but will not be available for several months. Backdated rate changes that cause a “ripple” change to intervening records are not correctly reported in the current query. A new data element will be added to EPM to correspond to the true rate changes that should be reported. In addition, the results do not currently include rate change amounts. For now, limit the use of this query only to become familiar with the EPM queries.
For the HRS Rate and Title History Query, log into the HRS EPM site.

Enter the name of the report UW_HR_JOBCODE_RATEHIST into the “begins with” box and click on Search. OR you can enter just UW_HR to get list of all report names that start with UW_HR.
A list of queries starting with the criteria you entered will appear. If you entered the entire query name, only one item is listed. If you entered a partial name, for example UW_HR, a list of all the queries beginning with UW_HR would appear and you select the query you want.

If you use a query frequently, add it to “My Favorite Queries”. See section 10.3 Add a Favorite Query.

Now select your results to be returned either as HTML format, or in an Excel spreadsheet that you can save, sort and edit.

The following search criteria screen is returned.

In the search criteria for this query, enter the Empl ID and the HRS Position Number, and click on view results. The results will be displayed in the format you chose from the prior screen.

If you asked for Excel when you requested the report, a box will pop-up asking if the system should open Microsoft Excel.

First click the “Open with” (even though it is already marked), then OK. Your results will be displayed in an Excel spreadsheet.

If you chose the HTML format, your result will be displayed in the format shown on the next page.
The example below is in the HTML format.

The items in red boxes above are equivalent to the APRH items highlighted in yellow below

- The new APPT ID is equal to the last 6 digits of HRS employee ID + 2 digit employer record number; for this example, the new Budget appointment ID would be 29876500
- Action will list whether the record is for a title change or a rate change
- Changes show an Action Reason (change) code and Action Reason Description. For example: 078 High Demand FA; 019 Merit; 022 Market Factor.
- Actions show the job code and title description
- Action Date is the date of entry. It is not the EFF DATE
- SENIORITY is obtained through the HRS Job Information query described in section 0. APPI / HRS Job Data Query

An alternate method to view title and rate changes is through the historical information on the HRS Job Data Work Location and Compensation tabs described in section 0. APPI / HRS Job Data Query. However, only the history after HRS migration will be available through the Job Data tabs.
# 5. APPR / IR Query or HRS Workforce Job Summary

## APPR 3270 Screen

<table>
<thead>
<tr>
<th>APPT ID</th>
<th>APPT%</th>
<th>TYPE</th>
<th>BASIS RATE</th>
<th>DEPT</th>
<th>STATUS</th>
<th>BEGIN</th>
<th>END</th>
</tr>
</thead>
<tbody>
<tr>
<td>01234567</td>
<td>FA</td>
<td>C</td>
<td>45850</td>
<td>Q321456</td>
<td>01</td>
<td>08/26/09</td>
<td></td>
</tr>
<tr>
<td>01500150</td>
<td>AS</td>
<td>L</td>
<td>B817161</td>
<td>02</td>
<td>06/01/10 12/01/10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01488888</td>
<td>FA</td>
<td>L</td>
<td>G300000</td>
<td>01</td>
<td>08/04/10 08/25/10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01414141</td>
<td>OT</td>
<td>L</td>
<td>A202045</td>
<td>02</td>
<td>01/01/10 01/31/10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01111111</td>
<td>AS</td>
<td>C</td>
<td>35998</td>
<td>B800090</td>
<td>02</td>
<td>08/27/07 05/17/09</td>
<td></td>
</tr>
<tr>
<td>00876543</td>
<td>SA</td>
<td>C</td>
<td>31897</td>
<td>C487222</td>
<td>02</td>
<td>08/25/03 05/17/09</td>
<td></td>
</tr>
<tr>
<td>00919119</td>
<td>SH</td>
<td>H</td>
<td>9.000</td>
<td>D017836</td>
<td>07/12/04 01/01/05</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| NEXT: | TP EXIT |

The Interactive Reporting (IR) and Query Library is a web-based repository or pre-written queries. Authorized users can access the IR/Query Library from [https://bi2.fastar.wisconsin.edu/workspace/index.jsp](https://bi2.fastar.wisconsin.edu/workspace/index.jsp)

This document assumes that you have obtained access to the IR and know how to Logon.
You will be using the query name Employee Job History.bqy

Once logged into IR, you will obtain a screen similar to this:

If you have already used the Employee Job History.bqy query, you will see it listed. Select it.

Otherwise, select Open.

If you selected Open, you will be presented with a list of queries available to you.

Highlight the query you want and click Open.
Enter criteria to find the employee, or obtain a list you may choose from.

If you entered an Employee ID and clicked on Process, wait for the processing hour-glass icon to disappear and then select Employee Jobs Report (from the left pane) to view the results.
Use this example to compare APPR with the Employee Job History report above.

<table>
<thead>
<tr>
<th>APPT ID</th>
<th>APPT%</th>
<th>TYPE</th>
<th>BASIS</th>
<th>RATE</th>
<th>MAJOR</th>
<th>CONTINUITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>01234567</td>
<td>FA</td>
<td>C</td>
<td>45850</td>
<td>Q321456</td>
<td>01</td>
<td>08/26/09</td>
</tr>
<tr>
<td>01500150</td>
<td>AS</td>
<td>L</td>
<td>B817161</td>
<td>02</td>
<td>06/01/10</td>
<td>12/01/19</td>
</tr>
<tr>
<td>01488888</td>
<td>FA</td>
<td>L</td>
<td>B817161</td>
<td>02</td>
<td>08/04/10</td>
<td>08/25/10</td>
</tr>
<tr>
<td>01414141</td>
<td>OT</td>
<td>L</td>
<td>A202045</td>
<td>02</td>
<td>01/01/10</td>
<td>01/31/10</td>
</tr>
<tr>
<td>01111111</td>
<td>AS</td>
<td>C</td>
<td>B800900</td>
<td>02</td>
<td>08/27/07</td>
<td>05/17/09</td>
</tr>
<tr>
<td>00876543</td>
<td>SA</td>
<td>C</td>
<td>C487222</td>
<td>02</td>
<td>08/25/03</td>
<td>05/17/09</td>
</tr>
<tr>
<td>00919119</td>
<td>SH</td>
<td>H</td>
<td>90000</td>
<td>D017836</td>
<td>07/12/04</td>
<td>01/01/05</td>
</tr>
</tbody>
</table>
5.2 APPR / HRS Workforce Job Summary Method

**APPR 3270 Screen**

<table>
<thead>
<tr>
<th>APPT ID</th>
<th>APPT%</th>
<th>TYPE</th>
<th>BASIS RATE</th>
<th>DEPT</th>
<th>STATUS</th>
<th>BEGIN</th>
<th>END</th>
</tr>
</thead>
<tbody>
<tr>
<td>01234567</td>
<td>0</td>
<td>FA</td>
<td>45850</td>
<td>Q321456</td>
<td>01</td>
<td>08/26/09</td>
<td></td>
</tr>
<tr>
<td>01500150</td>
<td>0</td>
<td>AS</td>
<td>L</td>
<td>B817161</td>
<td>02</td>
<td>06/01/10</td>
<td>12/01/10</td>
</tr>
<tr>
<td>01488888</td>
<td>0</td>
<td>FA</td>
<td>L</td>
<td>G300000</td>
<td>01</td>
<td>08/04/10</td>
<td>08/25/10</td>
</tr>
<tr>
<td>01414141</td>
<td>0</td>
<td>OT</td>
<td>L</td>
<td>A202045</td>
<td>02</td>
<td>01/01/10</td>
<td>01/31/10</td>
</tr>
<tr>
<td>01111111</td>
<td>25</td>
<td>AS</td>
<td>C</td>
<td>B809000</td>
<td>02</td>
<td>08/27/07</td>
<td>05/17/09</td>
</tr>
<tr>
<td>00876543</td>
<td>50</td>
<td>SA</td>
<td>C</td>
<td>C487222</td>
<td>02</td>
<td>08/25/03</td>
<td>05/17/09</td>
</tr>
<tr>
<td>00919119</td>
<td>0</td>
<td>SH</td>
<td>H</td>
<td>D017836</td>
<td>07/12/04</td>
<td>01/01/05</td>
<td></td>
</tr>
</tbody>
</table>

A list of appointments can be obtained from the HRS Job Data search described in section 0. *APPI / HRS Job Data Query*, but each appointment must be looked at separately to obtain the same information as on the APPR 3270 screen.

Alternately, the Workforce Job Summary provides a listing of all the person’s jobs, a summary of the change history for the jobs, and a hyperlink to the HRS Job Data to obtain details.
A listing of the person’s jobs are brought back.

Re-sort the order of the data by clicking on any of the column names (ex: Effective Date)

You can view data by using the tabs, or click on the file icon and the data row from each tab will appear on a single screen in one line.

All the jobs are listed with a summary of changes.

Below shows how the data for each record is now on one line instead of broken into tabs. In this view-mode, scroll to the right to see more data.

Reclick on the icon to revert back to tab mode.

Use whatever view you like best. The examples in this document show the tab view.
The items in the red boxes above are equivalent to the APPR items highlighted in yellow below.

- The new APPT ID is equal to the last 6 digits of Empl ID + 2-digit Empl Rec #
- The END date would be the HRS effective date of an ending action such as termination.

The items in the red boxes above are equivalent to the APPR items highlighted in yellow below.

- The new APPT ID is equal to the last 6 digits of Empl ID + 2-digit Empl Rec #
- The END date would be the HRS effective date of an ending action such as termination.
**Workforce Job Summary: Work Location Tab**

<table>
<thead>
<tr>
<th>Org Relation</th>
<th>Emp No</th>
<th>Position</th>
<th>Company</th>
<th>Department</th>
<th>Location</th>
<th>Reports To</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP</td>
<td>1</td>
<td>C40NN</td>
<td>UWS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>1</td>
<td>C40NN</td>
<td>UWS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>1</td>
<td>C40NN</td>
<td>UWS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>2</td>
<td>C40NN</td>
<td>UWS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>2</td>
<td>C40NN</td>
<td>UWS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>C40NN</td>
<td>UWS</td>
<td>0321456</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>C40NN</td>
<td>UWS</td>
<td>0321456</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The items in red boxes above are equivalent to the **APPR items highlighted in yellow** below.

**APPR**

<table>
<thead>
<tr>
<th>NAME DOE, JANE L</th>
<th>ID 00287010</th>
</tr>
</thead>
<tbody>
<tr>
<td>SENIORITY</td>
<td>CBC COMPLETED DATE 02/26/09</td>
</tr>
<tr>
<td>APPT ID</td>
<td>01234567</td>
</tr>
<tr>
<td>APPT%</td>
<td>0</td>
</tr>
<tr>
<td>TYPE</td>
<td>FA</td>
</tr>
<tr>
<td>BASIS RATE</td>
<td>C40NN</td>
</tr>
<tr>
<td>DEPT</td>
<td>ASSISTANT PROFESSOR</td>
</tr>
<tr>
<td>STATUS BEGIN END</td>
<td>08/26/09</td>
</tr>
</tbody>
</table>

**Workforce Job Summary: Salary Plan Tab**

<table>
<thead>
<tr>
<th>Org Relation</th>
<th>Emp No</th>
<th>APPT ID</th>
<th>APPT%</th>
<th>TYPE</th>
<th>BASIS RATE</th>
<th>DEPT</th>
<th>STATUS BEGIN END</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP</td>
<td>1</td>
<td>01234567</td>
<td>0</td>
<td>FA</td>
<td>45850</td>
<td>C40NN</td>
<td>01 08/26/09</td>
</tr>
<tr>
<td>EMP</td>
<td>2</td>
<td>01234567</td>
<td>0</td>
<td>FA</td>
<td>45850</td>
<td>C40NN</td>
<td>01 08/26/09</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>02109010</td>
<td>0</td>
<td>FA</td>
<td>45850</td>
<td>C40NN</td>
<td>01 08/26/09</td>
</tr>
</tbody>
</table>

If a field contains x’es, it means the data is being masked for a viewer who does not have security clearance to the information.

The items in the red box above is equivalent to the **APPR item highlighted in yellow** below.

**APPR**

<table>
<thead>
<tr>
<th>NAME DOE, JANE L</th>
<th>ID 00287010</th>
</tr>
</thead>
<tbody>
<tr>
<td>SENIORITY</td>
<td>CBC COMPLETED DATE 02/26/09</td>
</tr>
<tr>
<td>APPT ID</td>
<td>01234567</td>
</tr>
<tr>
<td>APPT%</td>
<td>0</td>
</tr>
<tr>
<td>TYPE</td>
<td>FA</td>
</tr>
<tr>
<td>BASIS RATE</td>
<td>C40NN</td>
</tr>
<tr>
<td>DEPT</td>
<td>ASSISTANT PROFESSOR</td>
</tr>
<tr>
<td>STATUS BEGIN END</td>
<td>08/26/09</td>
</tr>
</tbody>
</table>

3270 Query to HRS Mapping – APPR / IR Query or HRS Workforce Job Summary

Workforce Job Summary: Compensation Tab

<table>
<thead>
<tr>
<th>Order</th>
<th>Empl Rcd#</th>
<th>Effective Date</th>
<th>Seq</th>
<th>Annual Fte</th>
<th>Monthly Fte</th>
<th>Daily Fte</th>
<th>Hourly Rate</th>
<th>Currency</th>
<th>Percent</th>
<th>Components</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP</td>
<td>1 07/03/2011 0</td>
<td>53298.000</td>
<td>4441.500</td>
<td>149.741</td>
<td>25.525682 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>1 06/17/2011 0</td>
<td>53298.000</td>
<td>4441.500</td>
<td>149.751</td>
<td>25.525682 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>1 06/17/2011 1</td>
<td>53298.000</td>
<td>4441.500</td>
<td>149.751</td>
<td>25.525682 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>2 06/10/2011 0</td>
<td>22382.530</td>
<td>1885.211</td>
<td>62.886</td>
<td>10.718602 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>2 06/10/2011 1</td>
<td>22382.530</td>
<td>1885.211</td>
<td>62.886</td>
<td>10.718602 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0 05/29/2011 0</td>
<td>45850.000</td>
<td>3820.833</td>
<td>128.825</td>
<td>21.988812 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0 02/29/2011 0</td>
<td>45850.000</td>
<td>3820.833</td>
<td>128.825</td>
<td>21.988812 USD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If a field contains all 9s, it means the data is being masked for a viewer who does not have security clearance to the information.

The items in red boxes above are equivalent to the APPR item highlighted in yellow below.

APPAR PAGE 01

NAME DOE, JANE L                      ID  00287010
SENIORITY                        CBC COMPLETED DATE 02/26/09

APPT ID | APPT% | TYPE | BASIS | RATE | DEPT | STATUS | BEGIN | END |
--- | --- | --- | --- | --- | --- | --- | --- | --- |
01234567 | 0 | FA | C | 45850 | Q321456 | 01 | 08/26/09 |
C40NN | ASSISTANT PROFESSOR | ON-GOING |

Workforce Job Summary: Components Tabs

Salary Components

JANE DOE                      ID:  00287010

Compensation Rate:  5.094, 44444444 USD
Compensation Frequency:  9M

Pay Components

For classified, the hourly rate would be displayed, and frequency would say “Hourly”.

- **Amounts** tab shows Compensation Rate and Frequency (example: Annual)
- **Controls** tab shows how the pay components were assigned (example: Calculated by, or Manually Updated).
- **Changes** tab shows any changes made to pay components
- **Conversion** tab shows the converted compensation rate. The “Apply FTE” (apply full-time equivalent) indicates that the value associated with the rate code is to be multiplied by the FTE factor for annualization and de-annualization.
6. APDT and APCT / HRS Job Data Query and Tenure Query

**APDT 3270 screen**

DOE, JANE L  PERS ID 00298765  APDT PAGE 1
APPT ID 01234567  SENIORITY:  AS OF 07 14 2011
TYPE FA (FACULTY)  C40NN (ASSISTANT PROFESSOR)
APPT BEGIN 08 26 2009  END  BASIS C  SEASONAL
MAJ DEPT Q321456

<table>
<thead>
<tr>
<th>TOT APPT %</th>
<th>TOT LOA %</th>
<th>NET %</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.0000</td>
<td>0.0000</td>
<td>0.0000</td>
</tr>
</tbody>
</table>

_ DEPARTMENT X999999  (UW-MNT/HISTORY)  FROM 06 21 2010 - 07 09 2010
  BEGIN END  SESSION TYPE PERCENT  HRS  LOA TYPE/CHANGE RSN
  CURRENT FACULTY REL 2  (TENURE-TRACK)  FAC REL BEGIN 06 21 2010
  06 21 2010 07 09 2010  SS  DEPT% 50.0000

_ DEPARTMENT Q321456  (UW-MNT/PSYCHOLOGY)  FROM 08 26 2009 -
  CURRENT FACULTY REL 2  (TENURE-TRACK)  FAC REL BEGIN 08 26 2009
  08 26 2010 05 25 2011  AY  DEPT% 100.0000
  08 26 2009 05 25 2010  AY  DEPT% 100.0000

_ DEPARTMENT 2999999  (ONLINE/PSYCHOLOGY)  FROM 06 07 2010 - 07 30 2010
  CURRENT FACULTY REL 2  (TENURE-TRACK)  FAC REL BEGIN 06 07 2010
  06 07 2010 07 30 2010  SS  DEPT% 50.0000

NEXT __________________________________________________      TP EXIT ______

1=APPROB 2=APTNR 3=APPR 4=APPI 5=APRH 6=DEPT 7=APCT 8=CHGT 9=-1 10=+1 11=EXIT

**APDT: Appointment Department Inquiry**

Provides information regarding: how an appt is shared, what dept affiliation exists, dept FTE%, and active LOA

**APCT 3270 screen**

DOE, JANE L  PERS ID 00298765  APCT PAGE 1 MORE
APPT ID 01234567  SENIORITY:  AS OF 07 14 2011
TYPE FA (FACULTY)
APPT BEGIN 08 26 2009  END
MAJ DEPT Q321456  REQUESTED DATES 07 01 2010 THRU 06 30 2013

<table>
<thead>
<tr>
<th>INTERVAL</th>
<th>BEGIN</th>
<th>END</th>
<th>NET %</th>
<th>APPT %</th>
<th>LOA %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>08 26 2010 05 25 2011</td>
<td>100.0000</td>
<td>100.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>07 10 2010 07 30 2010</td>
<td>50.0000</td>
<td>50.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>07 01 2010 07 09 2010</td>
<td>100.0000</td>
<td>100.0000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**APCT: Appointment Percent History**

Displays the total appt % levels for a requested period of time. (Net % = Appt % - LOA %)
No queries currently exists that closely mimic the APDT and APCT 3270 screens.

- Appointment information can be obtained through the various HRS Job Data tabs discussed in section 0. APPI / HRS Job Data Query. Review HRS Job Data historical information for changes to FTE and standard hours, and whether the employee was on LOA.

- Tenure and faculty relationship information must be obtained through the HRS Tenure Query discussed in section 7. TNIQ / HRS Tenure Query.

- Section 8. HRS Budget Funding Query will display how appointment funding is shared across departments.
7. APTNR / HRS Tenure Query

The **APTNER 3270 Screen**, formerly the TNIQ screen, displayed history of faculty relation changes for all campuses and history of tenure percent changes for Madison campus.

<table>
<thead>
<tr>
<th>NAME</th>
<th>APPT ID</th>
<th>BEGIN DATE</th>
<th>END DATE</th>
<th>FAC REL</th>
<th>DEPT TENURE %</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMILEY, JOANN</td>
<td>00064909</td>
<td>01 01 1990</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>AS OF 06 01 1998</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>TYPE FA</td>
<td>C30NN (ASSOCIATE PROFESSOR)</td>
<td>MAJOR DEPT A060100</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PROBATION FROM</td>
<td>TO</td>
<td>PRIOR SERVICE</td>
<td>0.0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CONTRACT FROM</td>
<td>TO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BASIS A</td>
<td>TUREN % &amp; PROB VERIF</td>
<td>TENURE VERIF</td>
<td>N</td>
<td>TOT TENURE %</td>
</tr>
</tbody>
</table>

- APPT DEPT A037700 (BUS SV/STORES) BEG 01 01 1990 END
  
<table>
<thead>
<tr>
<th>Beg</th>
<th>End</th>
<th>FAC REL</th>
<th>DEPT TENURE %</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 01 1995</td>
<td>5 (AFFILIATE)</td>
<td>20.0000</td>
<td></td>
</tr>
<tr>
<td>01 01 1994</td>
<td>12 31 1994</td>
<td>1 (TENURE)</td>
<td>20.0000</td>
</tr>
<tr>
<td>06 01 1993</td>
<td>12 31 1993</td>
<td>2 (TENURE-TRACK)</td>
<td>20.0000</td>
</tr>
<tr>
<td>01 01 1990</td>
<td>05 31 1993</td>
<td>2 (TENURE-TRACK)</td>
<td>0.0000</td>
</tr>
</tbody>
</table>

- APPT DEPT A060100 (A D P/ADMINISTRATION) BEG 01 01 1990 END

<table>
<thead>
<tr>
<th>Beg</th>
<th>End</th>
<th>FAC REL</th>
<th>DEPT TENURE %</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 01 1994</td>
<td>1 (TENURE)</td>
<td>60.0000</td>
<td></td>
</tr>
<tr>
<td>06 01 1993</td>
<td>12 31 1993</td>
<td>2 (TENURE-TRACK)</td>
<td>60.0000</td>
</tr>
<tr>
<td>01 01 1992</td>
<td>05 31 1993</td>
<td>2 (TENURE-TRACK)</td>
<td>50.0000</td>
</tr>
<tr>
<td>01 01 1990</td>
<td>12 31 1991</td>
<td>2 (TENURE-TRACK)</td>
<td>40.0000</td>
</tr>
</tbody>
</table>

- Appointment information can be obtained through the various HRS Job Data tabs discussed in section 0. **APPI / HRS Job Data Query**. Review HRS Job Data historical information for changes, and whether the employee was on leave.
- This section will show how to find tenure data.
- **Section 8. HRS Budget Funding Query** will explain how to obtain funding data to determine if the tenure home departments or faculty relationship departments fund the employee’s position and by what percentage.
*Navigation tip: When you get here, add this to your Favorites if you have not already done so.
Enter your search criteria. For an EmplID, you will be taken directly to the tenure data. If other search criteria fits multiple employees, a listing will appear for you to select an employee.

Create Tenure Data: Tenure Data Tab

- All Tenure Home departments are listed here. In this example, the employee has only one tenure home, but if an employee has multiple tenure homes, they are all listed here.
- In this example, the FTE is shown for the Tenure Home; but this is not always the case.
Create Tenure Data: Prior Experience Credits Tab

Just a point of interest here is that the faculty member’s original start data can be found on this tab as well as the Employee Information screen described in section 0. APPI / HRS Job Data Query.

<table>
<thead>
<tr>
<th>Exp/Credit</th>
<th>Description</th>
<th>From Date</th>
<th>To Date</th>
<th>Credit Granted</th>
<th>Add to Tenure</th>
<th>Rank</th>
<th>Rank Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>948000</td>
<td>02/04/2003</td>
<td>06/30/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Create Tenure Data: Faculty Relationships Tab

This tab lists faculty relationships with other departments. Relationship types can be Affiliate, Joint Department, and Joint Executive.

<table>
<thead>
<tr>
<th>Department</th>
<th>Description</th>
<th>Faculty Relationship</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>948000 SMPH/MED PHYSICS/MED PHYSIC</td>
<td>Affiliate</td>
<td>02/04/2003</td>
<td>06/30/2014</td>
</tr>
<tr>
<td>2</td>
<td>261000 PHARM/PHARMACY</td>
<td>Affiliate</td>
<td>06/01/2008</td>
<td>06/30/2011</td>
</tr>
</tbody>
</table>

Post Tenure Review Date

To determine at what percentage, if any, tenure home and faculty relationship departments fund the employee’s position or positions, and what the Employee title modifiers that appear on Budget screens will be, one must look at funding information as well. The HRS Budget Funding Query is described in the next section, 8. HRS Budget Funding Query
8. HRS Budget Funding Query

Log into HRS Production

HRS Menu Navigation:

- Menu
  - Search:
    - My Favorites
    - Inbound File Upload
    - Self Service
    - Manager Self Service
    - Recruiting
    - Workforce Administration
    - Benefits
    - Compensation
    - Stock
    - Time and Labor
    - Payroll for North America
    - Global Payroll & Absence Mgmt
    - Payroll Interface
    - Workforce Development
    - Organizational Development
    - Enterprise Learning
    - Workforce Monitoring
    - Pension
    - Set Up HRMS
      - Install
      - Security
      - Upgrade
      - Foundation Tables
      - Common Definitions
      - Product Related
        - Recruiting
        - Workforce Administration
        - Base Benefits
        - Automated Benefits
        - eBenefits
        - Compensation
        - Stock
        - Time and Labor
        - Payroll for North America
        - Commitment Accounting
          - Fringe Costs
  - Budget Information
    - Combination Code Table
    - ChartField Transaction Table
    - Budget Benefit Groups
    - Department Budget FTE CAN
    - Department Budget FTE USA
    - Department Budget Table CAN
    - Department Budget Table USA
  - Budget Funding Data Entry
*Navigation tip: When you get here, add this to your Favorites if you have not already done so.

The system automatically fills in the Business Unit, based on your log-on into HRS, as part of your search criteria. If the person you want is not in the unit listed in Business Unit, click on the CLEAR button before you enter additional search criteria otherwise the system will respond that it cannot find the person.

As the example person is not in UWSYS, a clear was done to remove the business unit.

Then enter your search criteria and click the SEARCH button. EmplID is toward the bottom of the search criteria on this screen.

A funding list will appear. Select the correct fiscal year and employer record number.
Funding for the fiscal year and the empl rec selected is returned.

This funding example is for the same JOHN DOE queried in section 7. TNIQ / HRS Tenure Query. Here is a recap of JOHN DOE’s Tenure Home department and Faculty Relationships from the HRS Tenure Query.

From the funding and tenure information, one can see that this person is funded:

- 95% by the Tenure Home Department 949494, and
- 5% by “another” department 933333.
- No funding is by the Affiliate departments.

From this, one can also deduce that the title modifier for the employee under the Tenure Home UDDS will be “T”, and the title modifier under the Other (non-faculty relationship) department UDDS will be “A”.
9. PHIQ / HRS Payroll History Query

The PHIQ 3270 Screen listed data related to an employee’s payroll history including:

- Job Data
- Funding
- Payment Details
- Appointment/job information can be obtained through the various HRS Job Data tabs discussed in section 0. APPI / HRS Job Data Query
- Section 8. HRS Budget Funding Query explains how to obtain funding data
- This section shows the payment information that can be obtained in the HRS Payroll History.

*Navigation tip: When you get here, add this to your Favorites if you have not already done so.*
Review Paycheck
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Company: begins with

Pay Group: begins with

Pay Period End Date: =

Off Cycle ?

Page #: =

Line #: =

Separate Check #: =

Paycheck Number:

EmplID: begins with 00238765

Name: begins with

Enter your search criteria. If you know the EmplID (formerly Person ID), use it.

Search Results

<table>
<thead>
<tr>
<th>Company</th>
<th>Pay Group</th>
<th>Pay Period End Date</th>
<th>Off Cycle</th>
<th>Page #</th>
<th>Line #</th>
<th>Separate Check #</th>
<th>Form Identification</th>
<th>Paycheck Number</th>
<th>EmplID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>UMG</td>
<td>CRR</td>
<td>04/25/2011</td>
<td>N</td>
<td>161</td>
<td>2</td>
<td>0</td>
<td>ADVANCE</td>
<td>00238765</td>
<td>DOE JANE L</td>
<td></td>
</tr>
<tr>
<td>UMG</td>
<td>CRR</td>
<td>05/25/2011</td>
<td>N</td>
<td>163</td>
<td>2</td>
<td>0</td>
<td>ADVANCE</td>
<td>00238765</td>
<td>DOE JANE L</td>
<td></td>
</tr>
<tr>
<td>UMG</td>
<td>ERR</td>
<td>06/25/2011</td>
<td>N</td>
<td>69</td>
<td>1</td>
<td>0</td>
<td>ADVANCE</td>
<td>00238765</td>
<td>DOE JANE L</td>
<td></td>
</tr>
</tbody>
</table>

Pick the pay period you wish to view and click on it.

Note: If the employee has multiple appointments with the same payroll period, the payments for those appointments will all be on the same check.
This payroll history sample is for an unclassified person.

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Employee ID and name</td>
<td>2</td>
<td>Pay Period End Date</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>The Earnings section. This example shows the earnings section displayed (expanded). Clicking on the triangle will collapse the display into just the header line; re-click to expand.</td>
<td>5</td>
<td>The number of earnings records for the payment. This example has 4 earnings records for this paycheck (described on next page). You may scroll through each record by using the arrows or click on the “View All” to have all 4 earnings sections display on one screen.</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>This is the Empl record. If there are multiple appointments on this paycheck, this will indicate the appointment associated with this earnings record.</td>
<td>8</td>
<td>For an unclassified person, this is their “regular” earnings for the pay period indicated in #6.</td>
<td>9</td>
</tr>
<tr>
<td>10</td>
<td>This could be used to explain other earnings or adjustments, but this information must be entered by HRS staff in order to be listed on the payment history, and is not always provided.</td>
<td>11</td>
<td>This is the gross for the entire paycheck, which is NOT necessarily the amount coming to Budget. To determine the amount coming to Budget, sum the “regular” earnings.</td>
<td></td>
</tr>
</tbody>
</table>
This page shows the other 3 earnings records for the unclassified person from the previous page:

### Earnings

<table>
<thead>
<tr>
<th>Date Range</th>
<th>AddLine</th>
<th>Reason</th>
<th>Employment Record Number</th>
<th>Benefit Record Number</th>
<th>Original Paygroup</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/17/2011 - 06/22/2011</td>
<td>1</td>
<td>Not Specified</td>
<td>1</td>
<td>0</td>
<td>SRR</td>
</tr>
<tr>
<td>06/17/2011 - 06/22/2011</td>
<td>2</td>
<td>Not Specified</td>
<td>2</td>
<td>0</td>
<td>SRR</td>
</tr>
<tr>
<td>06/17/2011 - 06/22/2011</td>
<td>3</td>
<td>Not Specified</td>
<td>2</td>
<td>0</td>
<td>SRR</td>
</tr>
</tbody>
</table>

#### Salaried

<table>
<thead>
<tr>
<th>Hours</th>
<th>Rate</th>
<th>Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
<td>10.719602</td>
<td>0.00</td>
</tr>
</tbody>
</table>

#### Rate Used:

- Hourly Rate: $10.719602
- Rate Code: N/A

#### Other Earnings

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate Used</th>
<th>Hours</th>
<th>Rate</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FUD</td>
<td>Furlough Percent Reduction</td>
<td>Hourly Rate</td>
<td>-</td>
<td>-</td>
<td>-35.38</td>
</tr>
</tbody>
</table>

Subtracted from the gross payment, but not sent on to Budget.

A 2nd appointment is also on this payment since the pay period end date is the same.
What the payroll history does not show you:

- Funding splits: it does not show the amount paid under each fund, nor funding percentages. You have to calculate this after looking at the HRS Budget Funding for the correct fiscal year.
- Departments: it does not show the major department, nor the funding departments
- Though you see the earnings codes listed, it does not tell you which of the earnings are part of the amounts that are sent on to Budget. For example, overtime payments are added into the earned gross, but overtime amounts are not sent to Budget as they are not “regular “earnings.

Here is an example earnings record from a classified hourly employee

Information is similar to that on the unclassified paycheck except for the following:
1 – The hourly rate is listed. Nothing is shown in Earnings as this data field is for unclassified.
2 – The person’s earnings are detailed-out in the “Other Earnings” section. This example shows for week 05/08/2011 – 05/14/2011, which is the first week of the biweekly May B 2011 pay period, the hours, hourly rate, and amount earned for regular earnings (HRG). The OTR, which has been added into the paycheck gross amount, is not regular earnings and so does not get passed to Budget.

A retro payment could appear 2 ways:
- If the pay record’s Begin and End dates are prior to the dates of the pay period being run, all amounts shown in “Other Earnings” are retro
- A retro earnings code(example: HRP) is listed in “Other Earnings”.
Retros are not passed to Budget.
10. CNAM / HRS Person Information Query

The **CNAM 3270 Screen** presented a list of people with data similar to the search requested.

<table>
<thead>
<tr>
<th>INQ WAS: DOE, JANE</th>
<th>SEX:</th>
<th>TYPE:</th>
<th>UD: Q</th>
<th>PG 01 OF 01</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOE, JANE L</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRANS: 999999345</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C40NN ASSISTANT PROFESSOR</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q321456 UW/UW-MNT/PSYCHOLOGY/GENERAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Y31ND TCHNG ASST-DISSERTAT (H)</td>
<td>HOME: 414-222-9444</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B123456 MIL/L&amp;S/PSYCHOLOGY/PSY</td>
<td>1500 MAIN ST</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>APPT PERSON ID: 00298765</td>
<td>ANYTOWN, WI</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UPID: 0000212345</td>
<td>53700</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DOB: 08-08-48</td>
<td>EMAIL: <a href="mailto:JANE.DOE@UW.EDU">JANE.DOE@UW.EDU</a></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DOE, JANIS A</th>
<th>CAMPUS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRANS: 222222222</td>
<td></td>
</tr>
<tr>
<td>94870 STUDENT HELP</td>
<td></td>
</tr>
<tr>
<td>K905017 STP/CNR/ENVIRON RES UNIT/LAND</td>
<td></td>
</tr>
<tr>
<td>94870 STUDENT HELP</td>
<td>NOT RELEASED</td>
</tr>
<tr>
<td>R346800 UWC/UW-RLN/STUDENT CENTER/GENE</td>
<td></td>
</tr>
<tr>
<td>APPT PERSON ID: 00987654</td>
<td></td>
</tr>
<tr>
<td>UPID: 0000490646</td>
<td></td>
</tr>
</tbody>
</table>

There is not one query that will present all the data that is in the CNAM query. The HR query you use depends on whether you are looking for a UDDS, Budget ID, or Employee ID for a person to access a Budget appointment, or demographic information such as address or date of birth.

10.1. Job Data Search Method

If you are trying to find a UDDS, Budget ID, or Employee ID for a person to access a Budget appointment or HRS information, go directly to the Job Data search described in section 0. **APPI / HRS Job Data Query**, and enter name criteria. A list of matches is returned for you to select from. Other than name, the return list does not present enough information for you to determine which appointment to select. You will need to look at each appointment’s Job Data detail.

Log into HRS Production
10.2. Person Organizational Summary Method

A quick means of obtaining a list of all the appointments for a person is through the HRS Person Organizational Summary. (* Add to favorites if you use this frequently.)

Log into HRS Production

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

- **Find an Existing Value**
  - **EmpID:** begins with
  - **Name:**
  - **Last Name:** begins with
  - **Second Name:** begins with
  - **Alternate Character Name:** begins with
  - **Middle Name:** begins with

**Search Results**
A list of matches is returned.

- **View All**

If there are too many matches, you will need to be more specific in your search criteria.

Enter search criteria and click on Search.

Left click on a column header to sort by it. In this example, the list was sorted by first name/last name column.

This person has 3 appointments.

Click on View All to see all 3 on the same screen.
This example shows all the appointments on the same screen.

![Person Org Summary](image)

The items in **red boxes** above are equivalent to the **CNAM items highlighted in yellow** below. Other useful information on the HRS Person Org Summary is shown in the **green oval**.

```
INQ WAS: DOE, JANE
SEX: TYPE: UD: PG 01 OF 01
DOE, JANE L
TRANS: 999999345
C40NN ASSISTANT PROFESSOR
Q321456 UW/UW-MNT/PSYCHOLOGY/GENERAL
Y31ND TCHING ASST-DISSERTAT (H) 00000
B123456 MIL/L&S/PSYCHOLOGY/PSY
APPT PERSON ID: 00298765
UPID: 0000212345
DOB: 08-08-48
```

Unfortunately the Person Organizational Summary does not list the appointment title, which would be helpful to identify the appointment you wish to query. Nor does it allow you to select an appointment and through a hyper-link and directly jump to the Job Data details.
10.3. EPM Person Lookup Method

A third alternative is through EPM.

Log into EPM Production

Click on a column header to sort; this example was sorted by Last Name

Click on the person you want to review

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

Search Results

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOE</td>
<td>JANE</td>
</tr>
<tr>
<td>DOEBERT</td>
<td>AMALIA</td>
</tr>
<tr>
<td>DOEBEL</td>
<td>STEVEN</td>
</tr>
<tr>
<td>DOEBERT</td>
<td>THOMAS</td>
</tr>
<tr>
<td>DOEBERT</td>
<td>ADAM</td>
</tr>
<tr>
<td>DOEBL</td>
<td>PAUL</td>
</tr>
<tr>
<td>DOEBLEY</td>
<td>JOHN</td>
</tr>
<tr>
<td>DECE</td>
<td>LISA</td>
</tr>
<tr>
<td>DECE</td>
<td>CHRIS</td>
</tr>
<tr>
<td>DECE</td>
<td>MATTHEW</td>
</tr>
<tr>
<td>DECE</td>
<td>JESSICA</td>
</tr>
</tbody>
</table>
The items in red boxes above are equivalent to the **CNAM items highlighted in yellow** below.

Other useful information is shown in the **green oval**.

What this query does not show is employer record number.

```
INQ WAS:  DOE, JANE        SEX:     TYPE:   UD: Q   PG 01 OF 01
DOE, JANE L              CAMPUS:  222-5999
TRANS:                  ANYCOUNTY COUNTY-MAIN AD
C40NN ASSISTANT PROFESSOR
Q321456 UW/UW-MNT/PSYCHOLOGY/GENERAL
Y31ND TCHING ASST-DISSESSAT (H)
B123456 MIL/LAS/PSYCHOLOGY/PSY
APPT PERSON ID:         00298765
UPID:                  000212345
DOB:                    08-08-48
EMAIL: JANE.DOE@UW.EDU
```
10.4 Demographic Data Query

The Demographic Data Query will provide you with a person’s demographic information such as date of birth, gender, home contact information and business contact information.

*Navigation tip: When you get here, add this to your Favorites if you have not already done so.*

Enter your search criteria. If you know the EmplID (formerly Person ID), use it.

If you want to see changes to the demographic data over time, check the “Include History” box, else only the most current information will be returned.

If the criteria you enter, such as a last name only, matches multiple people, a selection list is returned. Otherwise you will be taken directly to the person’s demographic data.
Person Information: Biographical Details Tab

**Effective Date:** 02/10/2011  
**Format Type:** English  
**Display Name:** JANE DOE

**Date of Birth:** 08/08/1948  
**62 Years 10 Months**  
**Birth Country:** USA  
**Birth State:** United States

**Gender:** Female  
**Highest Education Level:** A-Not Indicated  
**Marital Status:** Unknown

**Language Code:**  
**Alternate ID:**

**Full-Time Student Employee**

**National ID**

<table>
<thead>
<tr>
<th>Country</th>
<th>National ID Type</th>
<th>National ID</th>
<th>Primary ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>Social Security Number</td>
<td>999-99-345</td>
<td></td>
</tr>
</tbody>
</table>

Click on the National ID triangle to display the SSN.

The items in red boxes above are equivalent to the **CNAM items highlighted in yellow** below.

Other useful information on the HRS Person Org Summary is shown in the green ovals.

---

INQ WAS:  DOE, JANE  
SEX:  TYPE:  UD: Q  PG 01 OF 01

DOE, JANE L  
CAMPUS:  222-5999

TRANS:  999999345  ANYCOUNTY COUNTY-MAIN AD

C40NN  ASSISTANT PROFESSOR

Q321456 UW/UW-MNT/PSYCHOLOGY/GENERAL  00000

Y31ND  TCHING ASST-DISSERTAT  (H)  HOME:  414-222-9444

B123456 MIL/L&S/PSYCHOLOGY/PSY  1500 MAIN ST

APPT PERSON ID:  00298765  ANYTOWN, WI

UPID:  0000212345

DOB:  08-08-48  EMAIL: JANE.DOE@UW.EDU

---
Person Information: View Name Screen

Near the top of the Biographical Details tab, click on View Name.

The various ways of displaying the person’s name in HRS is returned.

**View Name**

**English Name Format**

<table>
<thead>
<tr>
<th>Prefix</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
<th>Suffix</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>JANE</td>
<td>L</td>
<td>DOE</td>
<td></td>
</tr>
</tbody>
</table>

Click on OK to return to the Biographical Details tab.
The items in red boxes above are equivalent to the CNAM items highlighted in yellow below.

```plaintext
INQ WAS: DOE, JANE  SEX:  TYPE:  UD:  Q  PG 01 OF 01
DOE, JANE L  TRANS:  999999345  CAMPUS:  222-5999
C40NN ASSISTANT PROFESSOR
Q321456 UW/UW-MNT/PSYCHOLOGY/GENERAL  ANYCOUNTY COUNTY-MAIN
AD
Y31ND TCHING ASST-DISSERTAT  HOME:  414-222-9444
B123456 MIL/L&S/PSYCHOLOGY/PSY
APPT PERSON ID:  00298765  1500 MAIN ST
UPID:  0000212345  53700
DOB:  08-08-48  EMAIL: JANE.DOE@UW.EDU
```
11. Navigation Tips

11.1. Add a Favorite in HR Prod

In this document are references to “*Navigation tip: When you get here, add this to your Favorites if you have not already done so.*” Follow this tip to quickly jump to the HRS screens you commonly use rather than drilling down through multiple menu layers.

Navigate via the Oracle menu to the query screen you frequently use. Click on Add to Favorites. This screen will pop-up. Enter whatever you want to name your favorite and click on OK. After you click OK you will be taken back to the original screen from which you started this process.
Navigate up to the top of the Oracle Menu and open “My Favorites”. You should see your addition listed. If it is not, try closing and reopening “My Favorites; sometimes it takes a while for the new favorite to appear in the list. You can now navigate to the query from here.

To delete a favorite, go to Edit Favorites

Close and reopen Favorites. The favorite you deleted will no longer appear in your favorites list.

You can also:

- Rename a favorite in Edit Favorites by typing in a new name and saving.
- Change the order of your Favorites list by changing the sequence numbers and save.
11.2. Navigation Search

You can also search for queries via the “Search” capability at the top of the Oracle menu. Type in a key word or words.

A list of possible queries is returned. Click on the query name to navigate directly to the query.

If you wish return to the Oracle menu, click on Home.
11.3. Add a Favorite Query

This function is available in both HRS Production and EPM Production.

When in Query Viewer, you have the option of adding a specific query to a list of “My Favorite Queries”.

Click on Favorite for a query you often access.
Your favorite query will now appear in a “My Favorite Queries” list at the bottom of the screen.

And it will be displayed each time you go into the Query Viewer, saving you the step of searching for the query.

To remove a favorite, click on “-“, or remove the entire Favorites List.

End of Document