Finding Budget Related Data on HRS

as of 11/17/2011

This PowerPoint Presentation can be found at: http://www.wisconsin.edu/budplan/annualOpBudget.htm
“Welcome to .......”

A new application is unfamiliar, like a new store.

- Job Information
- Person Data
- Payroll
- Compensation Rates
- Tenure
- Job Titles
- Funding
- Changes to data over time
“Our Store Has Many Locations”

WHICH store location should you go to?

- HRS-HCM On-line Screens
- HRS-HCM Reports
- HRS-HCM Queries
- EPM-HCM Queries
- Interactive Reporting Queries.
Inside The New Store

And WHERE exactly do you go once inside the store to find what you need?

We can help you find your way
Security Access

First, you need permission to go the store

You need authorization to the information

Go to the following UW System Admin website:

https://uwservice.wisc.edu/administration/data-warehouse.php
to request access to HR, EPM and/or IR
When you access the website, and for any of the websites discussed within, you will be presented with a screen to select your campus, .....
And enter your campus Email ID and password
Requesting Access

Instructions

Requesting Access to the EPM Data Warehouse

Before you request access to the EPM Data Warehouse, you should become familiar with the EPM Data Views in order to determine which of them contain the particular data that you need to access. You should start by reading the "EPM Data Warehouse Resources" section, and review the List of EPM Data Views and EPM Data Dictionary.

Requesting Online EPM (PeopleSoft) Access and/or "Individual" External EPM Database Access (ODBC):

Once you’ve determined which Data Views you would like to access in EPM, you need to determine the EPM Security Roles that provides access to those Data Views. The EPM Security Roles are described in the HRS-EPM Security Role Catalog on the HRS Security web page.

Both access to the Online EPM (PeopleSoft) and "Individual" External EPM Database Access (ODBC) can be requested through IAM (Identity and Access Management).

For instructions on how to request either type of access to the EPM system, please refer to this document: Instructions for Requesting Access to the Production EPM System.

Note: All IAM security requests must be approved by your supervisor before your EPM access will be granted.

Menu List

Requesting EPM Online Access / Requesting "Individual" External EPM Database Access:

- Instructions for Requesting Access to the Production EPM System
- A list of EPM Security Roles is available on the HRS Security page.
- Instructions for Requesting ODBC Security Access to the EPQAS "EPM Test Environment"
- Security Awareness Training Instructions
- HRS User Compliance Agreement

Requesting "System/Application" External EPM Database Access:

- Guidelines for the Use of HRS-EPM Data
- Security Requirements for Local Store of Data
- Request For System Access To HRS-EPM Data | The completed form needs to be
Requesting Access

Select the Tab, Requesting EPM Access

On the menu side of the page, you will see:

View the available security roles; click on the 2\textsuperscript{nd} bullet:

- Instructions for Requesting Access to the Production EPM System
- A list of EPM Security Roles is available on the HRS Security page.
- Instructions for Requesting ODBC Security Access to the EPQAS "EPM Test Environment"
- Security Awareness Training Instructions
- HRS User Compliance Agreement
Requesting Access

On the **left** side of the Security page, the Security Role Catalogs are listed.

Look at the security roles and their descriptions for both HRS-HCM and HRS_EPM.
The Security Role Catalogs will list the roles and role descriptions.

The EPM catalog will list the roles for Interactive Reporting (IR) as well as the roles for EPM.

The catalogs may not be up-to-date. You will be taken to a valid list when requesting security roles on-line.
# Requesting Access

## Recommended Roles:

<table>
<thead>
<tr>
<th>HRS-HCM</th>
<th>HRS-EPM/IR</th>
</tr>
</thead>
<tbody>
<tr>
<td>FI Campus User Funding Reports</td>
<td>BI Budget Coordinator</td>
</tr>
<tr>
<td>FI Campus User Funding VW Only</td>
<td>HR Job Data View Only</td>
</tr>
<tr>
<td>FI Campus: Act Distrib Funding</td>
<td>HR Position View Only</td>
</tr>
<tr>
<td>FI Campus: Direct Retro VW</td>
<td>HR View Only</td>
</tr>
<tr>
<td>FI Campus: Retro Plan Fnd VW</td>
<td>HR Tenure View Only</td>
</tr>
<tr>
<td></td>
<td>EPM PY Qry RETRO NonSensitive</td>
</tr>
<tr>
<td></td>
<td>IR EPM All NS Query Library</td>
</tr>
</tbody>
</table>

**See your site lead with questions as to requesting roles**

For Interactive Reporting (IR) query ability, you also need to request the appropriate Query Library group for your campus. Contact your [Interactive Reporting campus administrator](#) for instructions.
Requesting Access

After looking at the roles, return to the Requesting EPM Access tab.
Requesting Access

You will be taken to a set of instructions that will step you through the process of requesting access.

Before you start following the instructions to request access, you may first want to check for roles already assigned to you. You can do this using the same set of instructions but with a few changes.
Requesting Access

To check on the authorizations you may already have
Use the same instructions as for requesting access, but:

- On step 4, select Manage Resources instead of Request Resources.
- Follow steps 5 through 8 per original instructions.
- When you get to step 9, select manage.

And select details when this box appears
Requesting Access

Your current authorizations will be listed

Close the list. You will be returned to where you can now select Request Resources, restarting step 4 of the instructions to request any roles you may still need

See your site lead for any additional help in requesting access
HR/EPM Web Addresses

Each application (HR, EPM, IR) is a different web-site

HR Production On-line screens, reports and queries:

https://www.hrs.wisconsin.edu/login

EPM Production queries:

https://www.epm.wisconsin.edu/login

For help, contact the HRS Support Center at 855-4UW-SUPP or 608-890-1501
IR Query Web Address

Interactive Reporting (IR) query:
https://bi2.fastar.wisconsin.eduworkspace

Contact Kathy Luker at 608-265-3761
kwluker@wisc.edu with questions.

Further IR information can be found at:
https://uwservice.wisc.edu/administration/data-warehouse.php
FAQS/Documentation tab
"Intro to EPM" Training Documents
Interactive Reporting Overview section
What you see on your menu depends on your access.
Excuse Me, Can You Tell Me In What Aisle I Can Find...?

So how do you know which application to log-into and where to go in the menus?

We developed a map – a document – showing where Budget Related Information can be found in the three applications.

It can be found at

http://www.wisconsin.edu/budplan/annualOpBudget.htm
What information do we show you how to find?

- Job/Appointment
- Compensation/Rate
- Funding
- Tenure and Faculty Relationships
- Person Demographics
- Payroll History
- Data History/Changes
- Different Ways to Find the Same data
- How to set up “Favorites” for quick navigation
We start with a familiar 3270 transaction, and then lead you to the HRS data.
3270 Transaction to HRS Mapping

We start with a familiar 3270 transaction.....

**APPI 3270 Screen**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOE, JANE L</td>
<td>AS OF 07 12 11 APPI PAGE 1</td>
</tr>
<tr>
<td>APPT ID 01 234567</td>
<td>PERS ID 002 98765 SENIORITY:</td>
</tr>
<tr>
<td>APPT BEGIN DATE 08 26 2009 01</td>
<td>(NEW APPOINTMENT) PRIOR LOC A TYPE AS BRK N</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: FA (FACULTY)</td>
<td>TITLE: C40NN (ASSISTANT PROFESSOR)</td>
</tr>
<tr>
<td>BASIS C RATE 45850</td>
<td>UWMF%</td>
</tr>
<tr>
<td>CONTINUITY 01 (ON -GOING)</td>
<td>SEASONAL</td>
</tr>
<tr>
<td>FLSA E (EXEMPT)</td>
<td></td>
</tr>
<tr>
<td>MAJOR DEPT Q321456 (UW-MNT/PSYCHOLOGY)</td>
<td>TOTAL APPT % 0.000</td>
</tr>
<tr>
<td></td>
<td>TOTAL LEAVE % 0.000</td>
</tr>
</tbody>
</table>

**Backup for APPT**

<table>
<thead>
<tr>
<th>NEXT</th>
<th>TP EXIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>YOUR LAST REQUEST WAS 01365762 07 -12-11</td>
<td></td>
</tr>
<tr>
<td>1=CHGT 2=APCT 3=APPR 4=APRH 5=APDT 6=CHGA 7=CHGR 8=DEPT 9=</td>
<td>-1 10=+1 11=EXIT</td>
</tr>
</tbody>
</table>
3270 Transaction to HRS Mapping

We tell you what application to log-into and where to navigate for the Budget related information, ....

Log into HRS Production

In this example, we are navigating to an HR screen
How to set-up your request for information, ....

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.

How to select a record to look at, ....
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.

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.
3270 Transaction to HRS Mapping

And compare it to the 3270 transaction.

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

<table>
<thead>
<tr>
<th>Item</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</td>
</tr>
<tr>
<td>APPT END DATE</td>
<td>-</td>
</tr>
<tr>
<td>LAST WORK DATE</td>
<td></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>FLSA</td>
<td>E (EXEMPT)</td>
</tr>
<tr>
<td>MAJOR DEPT</td>
<td>Q321456 (UW-MNT/PSYCHOLOGY)</td>
</tr>
<tr>
<td>SENIORITY</td>
<td></td>
</tr>
<tr>
<td>CONTINUITY</td>
<td>01 (ON-GOING)</td>
</tr>
<tr>
<td>SEASONAL</td>
<td></td>
</tr>
<tr>
<td>UWMF%</td>
<td></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

And include bullet points about the HR data fields that may be useful to know
3270 Transaction to HRS Mapping

Where there are HR screen tabs, we go through the tabs and highlight the information on each tab that is equivalent to information on the 3270.

Workforce Job Summary: Work Location Tab

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

For each HR tab, the budget related data is highlighted ....

Followed by the 3270 transaction directly underneath for ease of comparison.

<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>C</td>
<td>45850</td>
<td>Q321456</td>
<td>01</td>
<td>08/26/09</td>
</tr>
<tr>
<td>C40NN</td>
<td>ASSISTANT PROFESSOR</td>
<td>ON-GOING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
If the Budget Related Data is in an existing query, we tell you which application to log into, how to navigate to the query, which query to run, ....

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.

How to select the format in which you want the results displayed,...
3270 Transaction to HRS Mapping

What search criteria you may need to enter, .....
### 3270 Transaction to HRS Mapping

And how the data compares

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 2. APPI / HRS Job Data.

<table>
<thead>
<tr>
<th>APPT ID</th>
<th>EFF DATE</th>
<th>BASIS</th>
<th>RATE</th>
<th>TITLE AND CHANGE REASON</th>
<th>RATE CHANGE REASON</th>
</tr>
</thead>
<tbody>
<tr>
<td>01234567</td>
<td>08 26 2010</td>
<td>C</td>
<td>45850</td>
<td>C40NN (ASSISTANT PROFESSOR)</td>
<td>078 (HIGH DEMAND FA)</td>
</tr>
<tr>
<td></td>
<td>01 10 2010</td>
<td>C</td>
<td>44000</td>
<td>C40NN (ASSISTANT PROFESSOR)</td>
<td>078 (HIGH DEMAND FA)</td>
</tr>
<tr>
<td></td>
<td>08 26 2009</td>
<td>C</td>
<td>43000</td>
<td>C40NN (ASSISTANT PROFESSOR)</td>
<td>078 (HIGH DEMAND FA)</td>
</tr>
</tbody>
</table>
Query Tips and Rule

A query may be:

- Public – available to many to view and use
- Private – available to only you

When running a query that is Public, always run it from Query Viewer. The reason being.........
Query Tips and Rule

If you have clearance to Query Manager, you can edit a query. And being human, we all make mistakes. The query could be changed and saved in error, or even deleted.

If you want to change a public query for your own use, “take it off the shelf and put it in your own cart”
Query Rule

Open the query you want in Query Manager and immediately select **Save As**
Query Rule

Give it your own name and save it as a private query.

You can now make whatever changes you want and save it.
Explore More

Further information:

• EPM site [https://uwservice.wisc.edu/administration/data-warehouse.php](https://uwservice.wisc.edu/administration/data-warehouse.php)
  o Provides an overview of EPM
  o Instructions on how to request EPM access
  o Data Dictionary tab lists and describes the available data views and code descriptions
  o FAQs/Documentation tab provides
    - a list of reports and report descriptions
    - The “Intro to EPM” Training Document
    - The HRS PS Query Training Document

• HRS Report site [https://uwservice.wisc.edu/administration/reporting.php](https://uwservice.wisc.edu/administration/reporting.php)
  o Interactive Reporting (IR) Query Library tab provides instructions for access, use and help
  o HRS Reports Resources tab provides
    - a list of reports with instructions for each report (click on report name)
    - how to run reports
    - FAQs on report problems
    - Kathy Luker (608-265-3761) sends e-mails when new queries are added or issues reported. Contact her if you wish to be on the mailing list

• Wander through HRS to look at HRS screens, reports and existing queries to see what is available