HRS to Budget Comparison Report
WisLine Web Training

2013
Agenda

• Request Access to the ‘HRS to Budget Comparison Report’ Role

• How to Run the Report

• How to Obtain Report Output

• Overview of Report Output in Excel

• Questions?
Request Access to the ‘HRS to Budget Comparison Report’ Role

• Please utilize this link for an example of how to request a Role in HRS:
  – https://kb.wisc.edu/helpdesk/page.php?id=19870

1. Log into the IAM (Integrated Access Management) Console at:
   https://oim.iam.wisconsin.edu/xlWebApp/

   You may need to select your campus and enter your campus credentials. (Ex. UW-Madison NetID). If you are unsure of your login credentials, please see: UW System - Login credentials for each campus
Request Access

2. Click on **Requests** in the left-hand navigation menu, then select **Request Resources**
Request Access

3. Click the **Myself** radio button, then click **Continue »**
4. Click the **Search** button to open the list of available resources.
5. Select PSFT UM Server and click **Done**
6. Click **Add**.
Request Access

7. Enter your supervisor's full name under Supervisor Name

8. Select [Leave As Is] under Level of Data Access

![PSFT UM Server](image)
Request Access

Request Access

10. Click **Submit Changes**

11. Click **Continue »**

12. You will be presented with the **Compliance Agreement**. Read the agreement carefully. If you agree, select *I agree to the terms and conditions* and click **Continue »**.

13. A summary of your request will be displayed. Click **Submit Now** if everything looks correct.

14. You should see a confirmation that your request was submitted successfully.
How do I know when my request has been successfully completed?

• You may monitor the status at the same Identity and Access Management (IAM) Console you requested access at:

https://oim.iam.wisconsin.edu/xlWebApp/
Click on:
My Resources
My Requests
Request ID for your HRS to Budget Comparison Report Role Request
Select “Approval Details” from the drop-down

Please note: Under the Request Information section, the Status says “Approved”; however this is not an indication that the full request has been approved.
This is a sample showing that the final Status is still “Pending”

The final Status field will display as “Completed” when it has been fully authorized; the report will then be available in HRS to run.
How to Run the Report

- The report is in HRS (not EPM) at: https://www.hrs.wisconsin.edu/login

From the HRS Main Menu:
- UW HR Reports
  - HRS vs Budget Compare
How to Run the Report
How to Run the Report

• Select the “Add a New Value” tab.

• The Run Control ID box must be populated with a user-defined value and cannot contain spaces and can be mixed case if you like. For Example: HRS_Bud_Rpt; 1stReport; budrpt.

• Click on the “Add” button
How to Run the Report: End-User Selection Criteria
How to Run the Report: End-User Selection Criteria

*Budget Year [Mandatory]
End user to key in the budget year in which they would like the report to utilize for the Budget data portion of the report. The Budget data would be derived from live DB2 Budget data tables, not from day-old data warehouse data (what you would obtain from Brio/Hyperion queries). This means you would not have to wait until the next day to run the report for it to display any updates you made to the 3270 Budget System (BDGT, BRATE, etc.)

For Budget ID [Optional]
End user may key in a specific Budget ID for comparison (you do not need to make any other selections on the screen).
How to Run the Report:
End-User Selection Criteria

*For Campus, Division, Department or SubDepartment*
For larger institutions it is suggested to run the report for a Division, Department, or Sub Department, instead of the whole institution.

**For Staff Group:**
- Academic Staff
- All Selectable Groups
- Classified Employees
- Faculty
- Unclassified Employees
How to Run the Report:
End-User Selection Criteria

Details for Staff Group Dropdown

Please note the following inclusions and exclusions for Staff Group Selections:

• Only the following **Pay Basis Codes** will be **included**:  
  – A (Annual)  
  – C (Academic)  
  – H (Hourly)

• The following **Empl Class Codes** will always be **EXCLUDED**:  
  – SH (student help)  
  – SA (grad assistants)  
  – CL (classified –LTE)  
  – OT (ad hoc appointments & zero dollar appointments)
Details for Staff Group Dropdown Continued

– All Selectable Groups
  • FA (faculty)
  • LI (Limited)
  • AS (Academic Staff)
  • ET (Employees-in-Training)
  • CP (Classified – Permanent)
  • CJ (Classified – Project)

– Academic Staff
  • AS (Academic Staff)

– Classified Employees
  • CP (Classified – Permanent)
  • CJ (Classified – Project)

– Faculty
  • FA (faculty)

– Unclassified Employees
  • FA (faculty)
  • LI (Limited)
  • AS (Academic Staff)
  • ET (Employees-in-Training)
How to Run the Report: End-User Selection Criteria

**Selection Option:**
- Full Comparison
- In BOTH HRS and BUDGET
- Select in Budget Only
- Select in HRS Only

**Details:**
- **Full Comparison** (default); a record can be in Budget only, in HRS only, or in both systems.
- **In BOTH HRS and BUDGET;** Different than “Full Comparison” in that a record must be in both HRS and Budget.
- **Select in Budget Only**
- **Select in HRS Only** (FYI, this would populate the Home Department for the selection).

- **Please note:** One row for each budgeted department will be displayed on the report. If the Home Department in HRS does not match a Funding UDDS in BDGT, an additional row will be displayed to show this.
How to Run the Report: End-User Selection Criteria

- Exclude Post Doctoral and Post Grad Trainees (JobCodes begin X10-30 & X61 – X75)
- Exclude Lecturers (JobCodes begin D80 and D81)

End user may check any box to Backout Rate Adjustments for:
Proposed; Promotion; Merit; Other

Click the “Run” button (top right-hand side) to run the report for your selection.
How to Obtain Report Output

After you hit run, you are taken to the **Process Scheduler Request** screen - Click **OK**:
How to Obtain Report Output

You are then taken back to your initial run control screen, but you will now see a ‘Process Instance’ number underneath the run button. Click on the Process Monitor link:
How to Obtain Report Output

On the Process List tab you will see a list of jobs you have run.

1. Click the Details link following the most recent job when the Run Status displays “Success” and Distribution Status displays “Posted”
   - You may click the “Refresh” button to obtain and updated Status (do not click the “back arrow” on your browser):
How to Obtain Report Output

Example of Run Status “**Queued**” and Distribution Status “N/A”; this one is not yet ready to continue to process; you may click the “Refresh” button to obtain and updated Status.
How to Obtain Report Output

On the **Process Detail** screen, click on the **View Log/Trace** link:
How to Obtain Report Output

On the **View Log/Trace** screen, click on the link under file list you will see a report title that ends in “.xls” which will then pop up a new browser to display the Excel output file for your report.
Overview of Report Output in Excel

**Excel Output Results:** Some output fields are for display and some show a comparison.

**Display Data:**
Column A: Report DeptID
Column B: Budget ID
Column C: Budget Year
Column D: EmplID
Column E: Empl Rcd
Column F: Name
Column G: Home Dept
Column H: Funding UDDS

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B</th>
<th>Column C</th>
<th>Column D</th>
<th>Column E</th>
<th>Column F</th>
<th>Column G</th>
<th>Column H</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report DeptID</td>
<td>Budget ID</td>
<td>Budget Year</td>
<td>EmplID</td>
<td>Empl Rcd</td>
<td>Name</td>
<td>Home Dept</td>
<td>Funding UDDS</td>
</tr>
<tr>
<td>Y203000</td>
<td>'01223800</td>
<td>2013</td>
<td>'00012238</td>
<td>'00</td>
<td>AA</td>
<td>Y203000</td>
<td>Y203000</td>
</tr>
<tr>
<td>Y201500</td>
<td>'01358900</td>
<td>2013</td>
<td>'00013589</td>
<td>'00</td>
<td>BB</td>
<td>W101500</td>
<td>Y201500</td>
</tr>
<tr>
<td>W101500</td>
<td>'01358900</td>
<td>2013</td>
<td>'00013589</td>
<td>'00</td>
<td>CC</td>
<td>W101500</td>
<td>W101500</td>
</tr>
</tbody>
</table>
Overview of Report Output in Excel

**Comparison Data:** Arrows in Columns J, M, P, S, V will be displaying the results of comparing HRS data (always first/to the left) to Budget data (on the right)

<table>
<thead>
<tr>
<th>Column I</th>
<th>Column J</th>
<th>Column K</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRS Position</td>
<td>Position Diff</td>
<td>BDGT Position</td>
</tr>
<tr>
<td>'01320613</td>
<td>&gt;&gt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;</td>
<td>'00006492</td>
</tr>
<tr>
<td>'00006608</td>
<td></td>
<td>'00006608</td>
</tr>
</tbody>
</table>

Explanation of arrows that show differences between HRS and Budget:

.>>.  Found in HRS only. Data for the Budget_ID was found ONLY in the HRS data, there was NO data found in the mainframe Budget System.

.<<.  Found in Budget only. Data for the Budget_ID was found ONLY in the mainframe Budget System, but there was NO data found in the HRS system.

.<>.. Not equal/found in both. Data was found for the Budget_ID in BOTH the HRS system and the mainframe Budget System, but the data between the two systems does not match.

- **No arrows or a blank cell indicates there are no differences. One may choose to filter on this field to only show those with a difference.**
Overview of Report Output in Excel

**Comparison Data:**

Column L: HRS JobCode

Column M: JobCode Diff

Column N: BDGT Title Code

<table>
<thead>
<tr>
<th>Column L</th>
<th>Column M</th>
<th>Column N</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRS JobCode</td>
<td>JobCode Diff</td>
<td>BDGT Title Code</td>
</tr>
<tr>
<td>X50NN</td>
<td>&gt;&gt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;</td>
<td>C20NN</td>
</tr>
<tr>
<td>C20NN</td>
<td></td>
<td>C20NN</td>
</tr>
</tbody>
</table>
Overview of Report Output in Excel

**Comparison Data:**
Column O: HRS Title
Column P: Title Diff
Column Q: BDGT Title

<table>
<thead>
<tr>
<th>Column O</th>
<th>Column P</th>
<th>Column Q</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRS Title</td>
<td>Title Diff</td>
<td>BDGT Title</td>
</tr>
<tr>
<td>RESEARCH INTERN</td>
<td>&gt;&gt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;</td>
<td>PROFESSOR</td>
</tr>
<tr>
<td>PROFESSOR</td>
<td></td>
<td>PROFESSOR</td>
</tr>
</tbody>
</table>
## Overview of Report Output in Excel

**Comparison Data:**

Column R: HRS Pay Basis

Column S: Basis Diff

Column T: BDGT Pay Basis

<table>
<thead>
<tr>
<th>Column R</th>
<th>Column S</th>
<th>Column T</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRS Pay Basis</td>
<td>Basis Diff</td>
<td>BDGT Pay Basis</td>
</tr>
<tr>
<td>A</td>
<td>&gt;&gt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>&lt;&lt;</td>
<td>C</td>
</tr>
<tr>
<td>C</td>
<td></td>
<td>C</td>
</tr>
</tbody>
</table>
Overview of Report Output in Excel

Comparison Data:
Column U: HRS Rate
Column V: Rate Diff
Column W: BDGT Rate

<table>
<thead>
<tr>
<th>Column U</th>
<th>Column V</th>
<th>Column W</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRS Rate</td>
<td>Rate Diff</td>
<td>BDGT Rate</td>
</tr>
<tr>
<td>40000</td>
<td>&gt;&gt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>79801</td>
</tr>
<tr>
<td>&lt;   &lt;&lt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>141895</td>
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<td>141895</td>
</tr>
</tbody>
</table>
Overview of Report Output in Excel

**Display Data:**

Column X: HRS End Date

Column Y: BDGT New Rec

<table>
<thead>
<tr>
<th>Column X</th>
<th>Column Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRS End Date</td>
<td>BDGT New Rec</td>
</tr>
<tr>
<td></td>
<td>A</td>
</tr>
<tr>
<td></td>
<td>A</td>
</tr>
<tr>
<td>5/19/2013</td>
<td></td>
</tr>
</tbody>
</table>
THANK YOU!

• Next WisLine Web tentatively scheduled for Friday, February 8, 2013

• Contact Jane Kraus with any questions:
  – jkraus@uwsa.edu
  – 608-890-3273