



# 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.



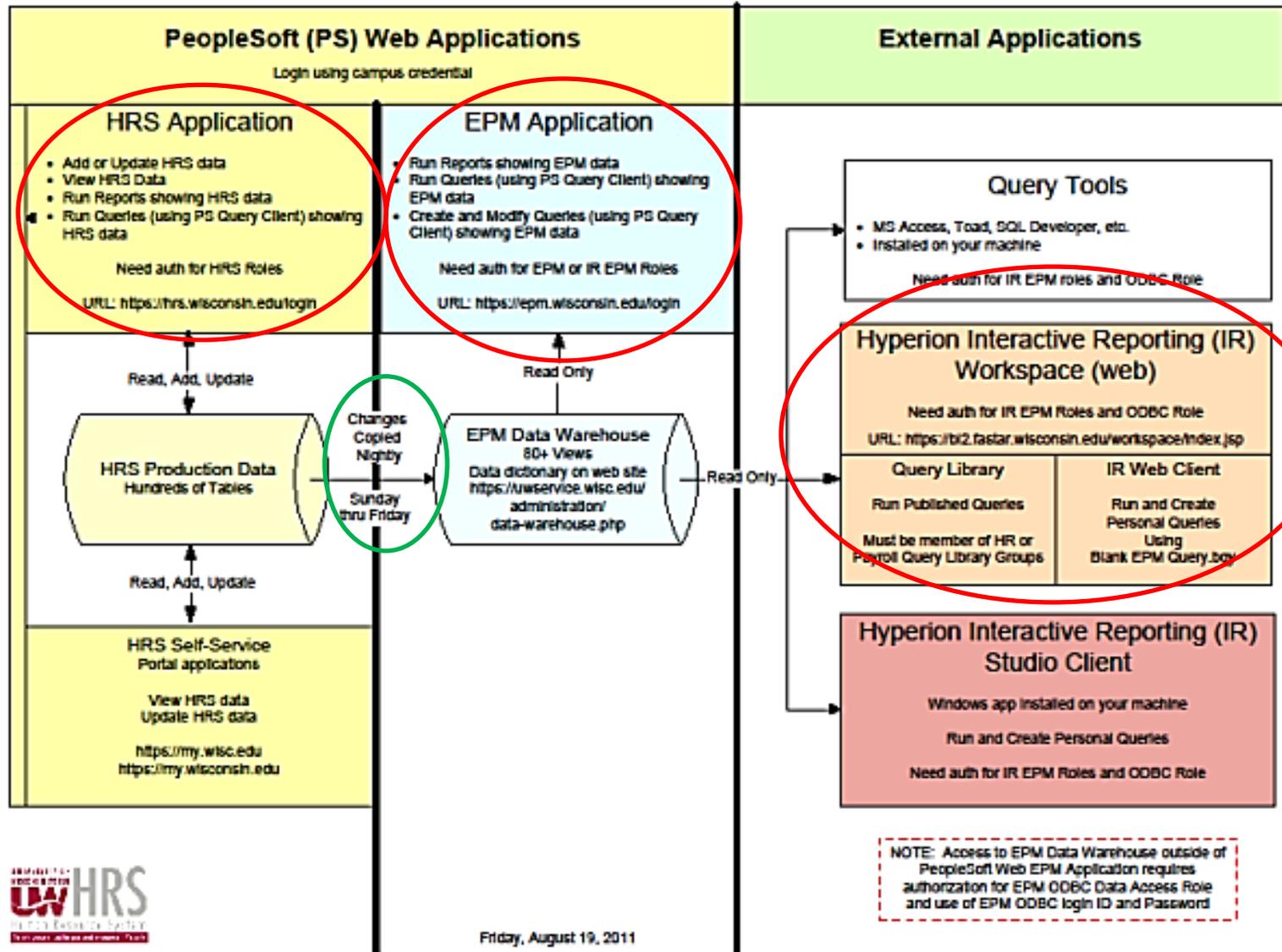
# Inside The New Store

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



We can help you find your way

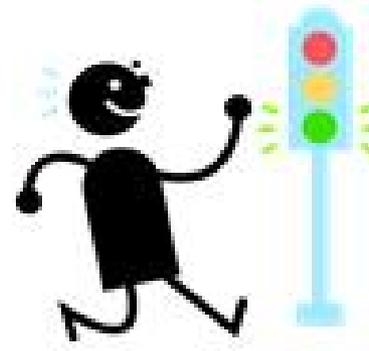




# Security Access

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

UNIVERSITY OF WISCONSIN SYSTEM  
**UW**

**UW SYSTEM**

UW System Home  
Campus Login Help  
Troubleshooting  
System Outages

Search UW System

SEARCH

UW System Home -- Authentication Redirector

### Select your organization

This service requires you to authenticate with your local organization, please select it from the list below.

- University of Wisconsin - Colleges
- University of Wisconsin - Eau Claire
- University of Wisconsin - Extension
- University of Wisconsin - Green Bay
- University of Wisconsin - La Crosse
- University of Wisconsin - Madison
- University of Wisconsin - Milwaukee
- University of Wisconsin - Oshkosh
- University of Wisconsin - Parkside
- University of Wisconsin - Platteville
- University of Wisconsin - River Falls
- University of Wisconsin - Stevens Point
- University of Wisconsin - Stout
- University of Wisconsin - System Administration
- University of Wisconsin - Whitewater

Select

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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



UNIVERSITY OF  
WISCONSIN SYSTEM  
**UW**



Please enter your Email ID  
(Need Help?)

Email ID

Password

Login

UNIVERSITY OF  
WISCONSIN SYSTEM  
**UW**

WISCONSIN FEDERATION  
IDENTITY PROVIDER

# Requesting Access

## EPM Data Warehouse

<< Return to: [Administration](#) | [Technical Infrastructure](#)

[EPM Data Warehouse Login](#)

[News](#)

[Nightly Batch](#)

[How to Access EPM](#)

[Requesting EPM Access](#)

[Data Dictionary/Views](#)

[FAQs/Documentation](#)

### 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.

Instructions



### 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

Menu List



# Requesting Access

Select the Tab, Requesting EPM Access

The screenshot shows a web application interface with three navigation tabs at the top: "Requesting EPM Access", "Data Dictionary/Views", and "FAQs/Documentation". The "Requesting EPM Access" tab is highlighted with a red oval. Below the tabs, there is a main content area. On the left side of this area, there is a menu with several items, including "Warehouse, you should order to determine which of need to access. You should Resources" section, and Data Dictionary." and "or "Individual" External EPM". A green arrow points from the text "View the available security roles; click on the 2<sup>nd</sup> bullet:" to the second bullet point in the list. On the right side of the main content area, there is a section titled "Requesting EPM Online Access / Requesting "Individual" External EPM Database Access:" which contains a list of four bullet points. The second bullet point, "A list of EPM Security Roles is available on the HRS Security page.", is highlighted with a green box.

**Requesting EPM Access** Data Dictionary/Views FAQs/Documentation

Warehouse, you should order to determine which of need to access. You should Resources" section, and Data Dictionary.

or "Individual" External EPM

you would like to access in ty Roles that provides access s are described in the Security web page.

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

- Instructions for Requesting Access to the Production EPM System
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- Instructions for Requesting ODBC Security Access to the EPQAS "EPM Test Environment"
- Security Awareness Training Instructions
- HRS User Compliance Agreement

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

View the available security roles; click on the 2<sup>nd</sup> bullet:

# 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

UNIVERSITY OF WISCONSIN SYSTEM My UW System  
**UW** UW System Administration

Home My UW System Employees Managers

## Security

<< Return to: [Administration](#) | [Technical Infrastructure](#)

### Secure Data Handling Reports and Resources

- [Secure Data Handling Reports and Resources](#) (updated 10/19)

### IAM (Identity Access Management) Training Resources

**[IAM \(OIM\) Production](#)**

HRS OIM (Oracle Identity Manager) Sandbox Course | Self enroll in [Desire2Learn](#)

**[IAM Training: Making Access Requests](#)**

#### Security Role Catalogs

- [HRS-HCM](#) (Human Capital Management) | Updated 11/2
- [HRS-EPM](#) (Enterprise Performance Management) | Updated 8/9

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

The Security Role Catalogs will list the roles and role descriptions



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

**HRS-EPM SECURITY ROLE CATALOG**

This catalog is a complete listing of all security roles available to all UW employees for access to the HRS-EPM data warehouse environment at the time of the publication date listed on the bottom of the page.

**ABSENCE MANAGEMENT**

Role Name	Role Description
EPM AM Query All Non Sensitive	This role contains query access to data views including absence accumulators, calc results and  This role contains access to the following views: UW_AM_ABSEVT_VW Absence View UW_AM_ABSOVR_VW Absence View UW_AM_ACCUM_VW Absence Accumulator View UW_AM_ERNDED_VW Absence Earnings/Deductions Results View UW_AM_RLT_CG_VW Absence Data View UW_AM_PD_HRS_VW (Non-Sensitive) Results Data View UW_AM_BAL_VW (Non-Sensitive) Balance View UW_GPCAL_RUN_VW Calculation Results View  In addition, access to all the Non-Sensitive (UW_P_%) is included.
IR EPM AM Query Library	This role is to be requested by related Absence Management roles.  Note: Individual ODBC database role.

**HRS-HCM SECURITY ROLE CATALOG**

This catalog is a complete listing of all security roles available to all UW employees for access to the HRS-HCM transactional environment at the time of the publication date listed on the bottom of the page.

**ABSENCE MANAGEMENT**

Role Name	Role Description
AM Campus Coordinator	UPDATE employee schedule assignments Approve, deny, correct absence entry Update absence balances Review results  Update all Employee level pages (Takes, Entitlements, Balances) - Review Employee Balance, - Add/Correction access for Absence Events. - Add Entitlement Overrides - View Absence Calculation Messages - View Payee Status - Create/Adjust Absence Triggers. - Define Absence Calendar Group. - View Absence Calc Processing Results.
AM Configuration View	View only access to all Absence Element Configuration including: - Takes - Entitlements - Balances - Formulas - Durations - Supporting Elements
AM Department Coordinator	Approve, Deny, Correct absence entry View employee level AM data  - Review Employee Balance, - Add/Correction access for Absence Events. - View Entitlement Overrides and Balance Adjustments - Create/Adjust Absence Triggers.  - Define Absence Calendar Group.  - View Absence Calc Processing Results.
AM Employee	Employee Self Service and earning statement Request Absences, View Balances, View Absence history
AM Event Entry	Student/Admin assist Update/Correction to Absence Event Entry View Absence Balances
AM Reports	Process and Review Reports

Run Date 8/3/2011

Run Date 11/1/2011 Page 1 of 13

# Requesting Access

## Recommended Roles:

HRS-HCM		HRS-EPM/IR
FI Campus User Funding Reports	BI Budget Coordinator	EPM FI Query All Non Sensitive
FI Campus User Funding VW Only	HR Job Data View Only	EPM HR Query All Non Sensitive
FI Campus: Act Distrib Funding	HR Position View Only	EPM PY Qry Empl Lvl NonSensitiv
FI Campus: Direct Retro VW	HR View Only	EPM PY Qry RETRO NonSensitive
FI Campus: Retro Plan Fnd VW	HR Tenure View Only	IR EPM All NS Query Library

**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](#)

**News** **Nightly Batch** **How to Access EPM** **Requesting EPM Access** **Data Dictionary/Views** **FAQs/Documentation**

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- [Security Requirements for Local Store of Data](#)
- [Request For System Access To HRS-EPM Data](#) | The completed form needs to be

# Requesting Access

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

Requesting EPM Roles through IAM

EPM Security Overview

PeopleSoft EPM (Enterprise Performance Management) is the new data warehouse for the PeopleSoft HRS system, with some queries and reports pre-written. EPM also allows you to write queries with the "PS Query" tool, and

> EPM

Requesting EPM Roles through IAM

**INSTRUCTIONS FOR REQUESTING EPM ACCESS VIA IAM:**

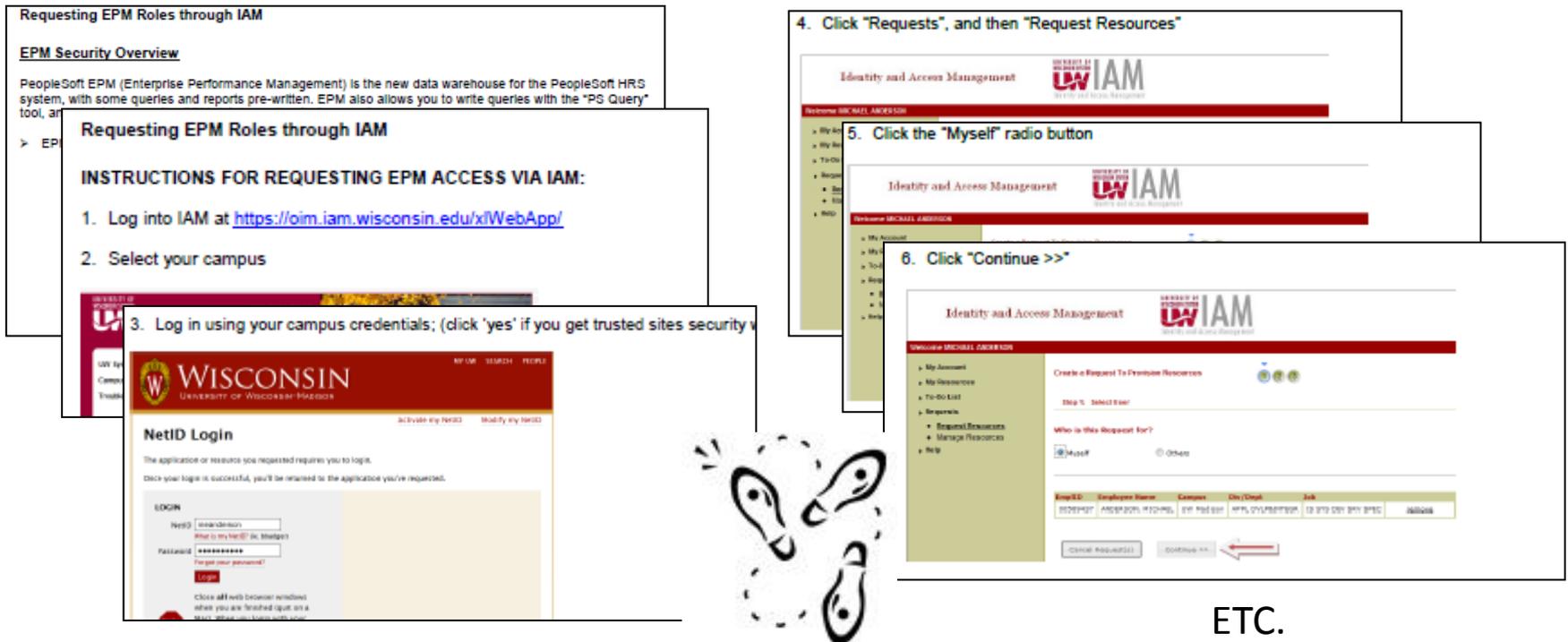
1. Log into IAM at <https://oim.iam.wiscconsin.edu/xiWebApp/>
2. Select your campus
3. Log in using your campus credentials; (click 'yes' if you get trusted sites security v

4. Click "Requests", and then "Request Resources"

5. Click the "Myself" radio button

6. Click "Continue >>"

ETC.



**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.

Identity and Access Management

Welcome NANCY LUDWIG HOME | LOGOUT | ABOUT

- My Account
- My Resources
- To-Do List
- Requests
  - Request Resources
  - Manage Resources
- Help

Welcome To The Oracle Identity Manager Administration Console

Quick Status

Requests raised by you in the last 30 days 0

Requests raised for you in the last 30 days 0

Manage Your Account

My Proxy

Identity and Access Management

Welcome NANCY LUDWIG HOME | LOGOUT | ABOUT

Create a Request To Manage Resource Access 1 2 3 4

Step 2: Select Resources

Resource Name PSFT UM Server Manage

And select details when this box appears

User Name	Resource Name	Roles	Revoke	Changed	New Role(s)	Removed Role(s)	Supervisor's Name
LUDWIG, NANCY	PSFT UM Server	UW UNV ...	<input type="checkbox"/>				<a href="#">Change</a> <a href="#">Comment</a> <a href="#">Remove</a> <a href="#">Details</a>

# 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



Entitlement Change Details

Entitlement Details	
Supervisor Name	
Level of Data Access	
Current Roles:	IR EPM BN Snstve Query Library IR EPM HR Snstve Query Library  BI Budget Coordinator BN Benefits View EPM FI Query All Non Sensitive EPM HR Query All Non Sensitive EPM PY Qry Empl Lvl NonSensitiv EPM PY Qry RETRO NonSensitive FI Campus User Funding Reports FI Campus User Funding VW Only FI Campus: Act Distrib Funding FI Campus: Direct Retro VW FI Campus: Retro Plan Fnd VW HR Job Data View Only  HR Position View Only HR Student Help View Only HR View Only
New Roles:	
Removed Roles:	

Close

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.faster.wisconsin.edu/workspace>

Contact Kathy Luker at 608-265-3761

[kwluker@wisc.edu](mailto: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

# Inside the Store



**ORACLE**

Personalize [Content](#) | [Layout](#)

**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
- Set Up SACR
- Enterprise Components
- UW Absence Management Reports
- UW Benefits Reports
- UW Financial Reports
- UW HR Reports
- UW Payroll Reports
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
- Packaging
- UW
- Careers

**ORACLE** EPM Production

Personalize [Content](#) | [Layout](#)

**Menu**

Search:

- EPM Reports
- Planning and Budgeting
- Scorecards
- Key Performance Indicators
- Project Portfolio Management
- Customer Behavior Modeling
- Workforce Analytics
- Financial Services Industries
- Global Consolidations
- Activity Based Management
- Upgrade Setup
- EPM Foundation
- Enterprise Components
- Tree Manager
- Reporting Tools
- PeopleTools
- Development Utilities
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)
- [My Dictionary](#)
- [HRS](#)

EPM

Welcome NANCY S LUDWIG | Log Off ORACLE

Search

/Shared Workspace Pages/HomePage

Recently Opened

- Blank EPM Query.bqy
- Employee Job History.bqy
- HRS Hires and Job Change Transactions.bqy
- EPM 11.1.1.3 Documentation
- InfoAccess Production.bqy
- Open...

Quick Links

Favorites

- Employee Job History.bqy
- My Personal Page
- Applications

Workspace Pages

HomePage

IR

HRS – main menu

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



# 3270 Transaction to HRS Mapping



**3270 QUERY to HRS MAPPING**  
**For BUDGET RELATED DATA**  
**November 2011**

We start with a familiar 3270 transaction, and then lead you to the HRS data.

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# 3270 Transaction to HRS Mapping

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

## APPI 3270 Screen

```
DOE, JANE L                AS OF 07 12 11                APPI PAGE 1
APPT ID 01 234567          PERS ID 002 98765          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

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
```

# 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







# 3270 Transaction to HRS Mapping

Take you shopping through the data returned, ....

## Job Data: HRS Work Location Tab

<b>Work Location</b>		<a href="#">Job Information</a>	<a href="#">Job Labor</a>	<a href="#">Payroll</a>	<a href="#">Payroll*</a>	<a href="#">Salary Plan</a>	<a href="#">Compensation</a>	<a href="#">UW Custom</a>	
<b>JANE DOE</b>	EMP	<b>ID:</b> 00298765	<b>Empl Rcd #:</b> 0						
<b>HR Status:</b> Active	<b>Payroll Status:</b> Leave of Absence	<a href="#">Go To Row</a>							
<b>Effective Date:</b> 05/26/2011	<b>Sequence:</b> 0	<b>Job Indicator:</b> Primary Job							
<b>Action:</b> Short Work Break	<b>Reason:</b> End of Academic Year	Current							
<b>Last Start Date:</b> 02/10/2011	<b>Termination Date:</b>								
<b>Expected Job End Date:</b>	<b>Expected Return Date:</b>								
<b>Last Date Worked:</b> 05/25/2011	<input type="checkbox"/> <b>Override Last Date Worked</b>	<b>Position Entry Date:</b> 02/10/2011							
<b>Position Number:</b> 01234567	ASSISTANT PROFESSOR								
<a href="#">Override Position Data</a>	<input type="checkbox"/> <b>Position Management Record</b>								
<b>Regulatory Region:</b> USA	United States								
<b>Company:</b> UWS	University of Wisconsin System								
<b>Business Unit:</b>									
<b>Department:</b> Q321456	MNT/PSYCHOLOGY	<b>Department Entry Date:</b> 02/10/2011							
<b>Location:</b>	MAIN-ADMINISTRATION BLDG								
<b>Establishment ID:</b>		<b>Date Created:</b> 05/28/2011							
Job Data	<a href="#">Employment Data</a>	<a href="#">Earnings Distribution</a>	<a href="#">Benefits Program Participation</a>						

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.

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

- 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

### Workforce Job Summary

JANE DOE EMP ID: 0028665

Org Relation	Empl Rcd#	Effective Date	Seq	Position	Company	Department	Location	Reports To
EMP	1	06/17/2011	D	C40NN	UWS			
EMP	2	06/10/2011	D	C40NN	UWS			
EMP	0	05/26/2011	D	C40NN	UWS	Q321456		
EMP	0	02/10/2011	D	C40NN	UWS	Q321456		

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

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

APPR						PAGE 01	
NAME DOE, JANE L			ID 00287010				
SENIORITY			CBC COMPLETED DATE 02/26/09				
APPT ID	APPT%	TYPE	BASIS	RATE	MAJOR DEPT	CONTINUITY	STATUS BEGIN END
01234567	0	FA	C	45850	Q321456	01	08/26/09
		C40NN	ASSISTANT PROFESSOR			ON-GOING	

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

# 3270 Transaction to HRS Mapping

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.

The screenshot shows the Oracle Query Viewer interface. On the left is a navigation menu with categories like EPM Reports, Planning and Budgeting, etc. The main area is titled 'Query Viewer' and contains a search bar with the text '\*Search By: Query Name begins with UW\_HR\_JOBCODE\_RATEHIST'. Below the search bar are 'Search' and 'Advanced Search' buttons. The search results section shows a table with one entry: 'UW\_HR\_JOBCODE\_RATEHIST Job Code & Rate History' owned by 'Public'. The table has columns for 'Query Name', 'Description', 'Owner', 'Folder', 'Run to HTML', 'Run to Excel', 'Schedule', and 'Add to Favorites'. Arrows point from the 'Run to HTML' and 'Run to Excel' links to text explaining the format selection process.

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

\*Search By: Query Name begins with UW\_HR\_JOBCODE\_RATEHIST

Search Advanced Search

**Search Results**  
\*Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
UW_HR_JOBCODE_RATEHIST	Job Code & Rate History	Public		HTML	Excel	Schedule	Favorite

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, .....

The following search criteria screen is returned.

In the search criteria for this query, enter the EmpID 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.

UW\_HR\_JOBCODE\_RATEHIST - Job Code & Rate History

EmpID (required / no %): 00298765  
Position Nbr (required / no %): 01234567

Name	EmpID	EmpID #	Adjusted Continuous Service Dt	HR Status	Payroll Status	Position Number	Action	Action Reason
------	-------	---------	--------------------------------	-----------	----------------	-----------------	--------	---------------

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.

# 3270 Transaction to HRS Mapping

And how the data compares



View All First 1-4 of 4 Last

Name	Emp ID	Emp Bal	Adjusted Continous Service Lf	UR Status	Org Status	Position Number	Action	Action Reason	Action Description	Action Date	Pay Basis	Comp Rate	Job Code	Job Description
2 DOE JANE	00298765	0				01234567	RTCHG	078	HIGH DEMAND FA	08/26/2010	C	45850.000000		
4 DOE JANE	00298765	0				01234567	TITLE			08/26/2009	C	43000.000000	C40NN	ASSISTANT PROFESSOR

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

<b>DOE, JANE I</b>	AS OF 07 13 2011	APRH PAGE 1 OF 1			
<b>APPT ID</b> 01234567	<b>PERS ID</b> 00298765	<b>SENIORITY</b> :			
<b>EFF DATE</b>	<b>BASIS</b>	<b>RATE</b>	<b>TITLE</b>	<b>AND CHANGE REASON</b>	<b>RATE CHANGE REASON</b>
_ 08 26 2010	C	45850	C40NN	(ASSISTANT PROFESSOR)	078 (HIGH DEMAND FA)
_ 01 10 2010	C	44000	C40NN	(ASSISTANT PROFESSOR)	078 (HIGH DEMAND FA)
_ 08 26 2009	C	43000	C40NN	(ASSISTANT PROFESSOR)	

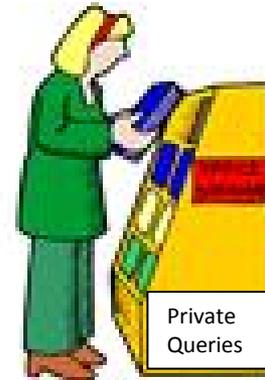
- The new APPT ID is equal to the last 6 digits of HRS employee ID + 2 digit employer record number; for this example, the new Budget appointment ID would be 29876500
- Action will list whether the record is for a title change or a rate change
- Changes show an Action Reason (change) code and Action 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*

# Query Tips and Rule

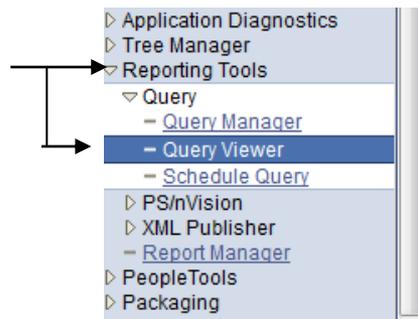
A query may be:



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



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



		up in BILLGZ		
NL_CALC_DATE_EMPLREC		Private	BUDGET_PROMPTS	<a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a> <a href="#">Favorite</a>
NL_PHIQ		Private		<a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a> <a href="#">Favorite</a>
AD701__ADMISSIONS_ACTIONS_TBL	AD701--Admissions Actions Tbl	Public		<a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a> <a href="#">Favorite</a>
AD702__TEST_TABLES	AD702--Test Tables	Public		<a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a> <a href="#">Favorite</a>
AD703__RECRUIT_CATEGORY_TBL	AD703--Recruit Category Tbl	Public		<a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a> <a href="#">Favorite</a>
AD704__REFERRAL_SOURCE_TBL	AD704--Referral Source Tbl	Public		<a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a> <a href="#">Favorite</a>

# 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.



The screenshot shows a software interface with a left-hand navigation pane and a main content area. The navigation pane is titled 'Reporting Tools' and contains a tree view with 'Query' expanded to show 'Query Manager', 'Query Viewer', and 'Schedule Query'. The main content area displays a list of queries with columns for checkboxes, query names, descriptions, and permissions. A stick figure character is pointing at the 'AD703\_\_RECRUIT\_CATEGORY\_TBL' query, which is marked as 'Public'.

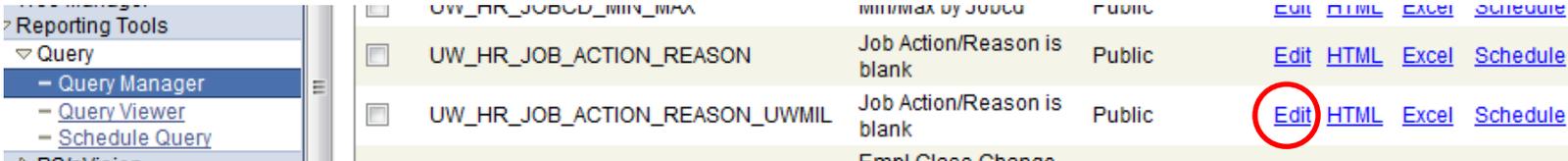
Query Name	Description	Permissions	Actions
NL_CALC_DATE_EMPLREC		Private BUDGET_PROMPTS	<a href="#">Edit HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>
NL_PHIQ		Private	<a href="#">Edit HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>
AD701__ADMISSIONS_ACTIONS_TBL	AD701---Admissions Actions Tbl	Public	<a href="#">Edit HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>
AD702__TEST_TABLES	AD702---Test Tables	Public	<a href="#">Edit HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>
AD703__RECRUIT_CATEGORY_TBL	AD703---Recruit Category Tbl	Public	<a href="#">Edit HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>
AD704__REFERRAL_SOURCE_TBL	AD704---Referral Source Tbl	Public	<a href="#">Edit HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>

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

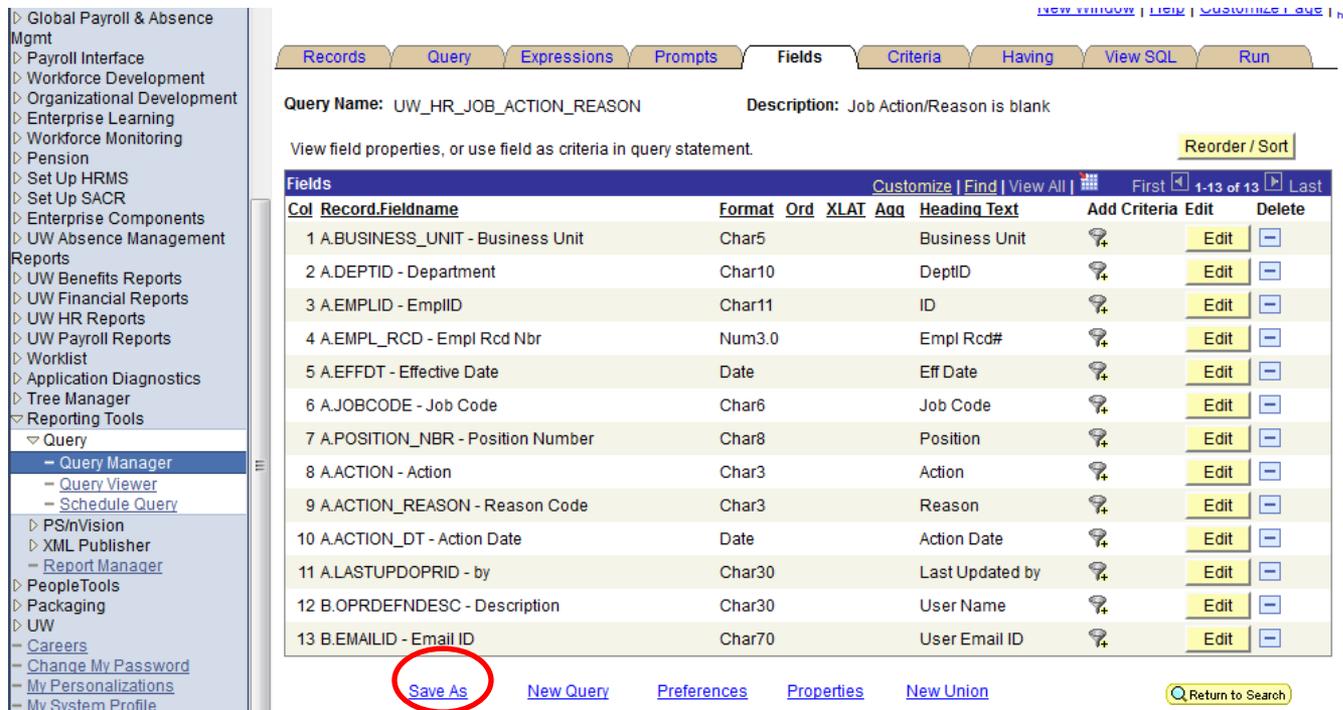
Open the query you want in Query Manager



The screenshot shows a menu on the left with 'Reporting Tools' expanded to 'Query Manager'. The main area displays a list of query rules with columns for name, description, and public status. The 'Edit' link for the third rule is circled in red.

Query Name	Description	Public	Actions
UW_HR_JOB_CD_MIN_MAX	Min/Max by JobCd	Public	<a href="#">Edit</a> <a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>
UW_HR_JOB_ACTION_REASON	Job Action/Reason is blank	Public	<a href="#">Edit</a> <a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>
UW_HR_JOB_ACTION_REASON_UWMIL	Job Action/Reason is blank	Public	<a href="#">Edit</a> <a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>
UW_HR_JOB_ACTION_REASON_UWML	Empl Class Change	Public	<a href="#">Edit</a> <a href="#">HTML</a> <a href="#">Excel</a> <a href="#">Schedule</a>

and immediately select [Save As](#)



The screenshot shows the 'Query Manager' interface. The 'Fields' tab is selected, displaying a list of fields with columns for 'Col', 'Record', 'Fieldname', 'Format', 'Ord', 'XLAT', 'Agg', 'Heading Text', 'Add Criteria', 'Edit', and 'Delete'. The 'Save As' button at the bottom is circled in red.

Query Name: UW\_HR\_JOB\_ACTION\_REASON Description: Job Action/Reason is blank

View field properties, or use field as criteria in query statement.

Col	Record	Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A	BUSINESS_UNIT - Business Unit	Char5				Business Unit		<a href="#">Edit</a>	<a href="#">-</a>
2	A	DEPTID - Department	Char10				DeptID		<a href="#">Edit</a>	<a href="#">-</a>
3	A	EMPLID - EmplID	Char11				ID		<a href="#">Edit</a>	<a href="#">-</a>
4	A	EMPL_RCD - Empl Rcd Nbr	Num3.0				Empl Rcd#		<a href="#">Edit</a>	<a href="#">-</a>
5	A	EFFDT - Effective Date	Date				Eff Date		<a href="#">Edit</a>	<a href="#">-</a>
6	A	JOB_CODE - Job Code	Char6				Job Code		<a href="#">Edit</a>	<a href="#">-</a>
7	A	POSITION_NBR - Position Number	Char8				Position		<a href="#">Edit</a>	<a href="#">-</a>
8	A	ACTION - Action	Char3				Action		<a href="#">Edit</a>	<a href="#">-</a>
9	A	ACTION_REASON - Reason Code	Char3				Reason		<a href="#">Edit</a>	<a href="#">-</a>
10	A	ACTION_DT - Action Date	Date				Action Date		<a href="#">Edit</a>	<a href="#">-</a>
11	A	ALASTUPDOPRID - by	Char30				Last Updated by		<a href="#">Edit</a>	<a href="#">-</a>
12	B	OPRDEFNDESC - Description	Char30				User Name		<a href="#">Edit</a>	<a href="#">-</a>
13	B	EMAILID - Email ID	Char70				User Email ID		<a href="#">Edit</a>	<a href="#">-</a>

[Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

# Query Rule

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



Enter a name to save this query as:

\*Query:

Description:

Folder:

\*Query Type:

\*Owner:

Query Definition:

OK

Cancel

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>
  - Provides an overview of EPM
  - Instructions on how to request EPM access
  - Data Dictionary tab lists and describes the available data views and code descriptions
  - 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>
  - Interactive Reporting (IR) Query Library tab provides instructions for access, use and help
  - 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



