

KB – Record Errors Report

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Purpose and Overview

The Record Errors Report displays all records in the budget that have generated any sort of (employee-level) error based on the edits that have been set up in the CAT. This report contains all Job Level Errors, Compensation Change Errors, Funding edit errors (SFS, budget errors) and Funding Section Errors (math-type errors). The run control will allow for the user to include all errors, or separate them out by type (funding edit, funding section, job level or compensation).

Job Errors: Certain error statuses will be stored at the job level (parent CAT record). Users will need to be able to save the CAT page, even with some of these errors existing (i.e., planned FTE errors).

Funding Edit Errors: Users of the CAT will need to be able to save the CAT page with invalid funding strings (those that don't pass SFS edits if ok to load is checked, and those that don't pass budget edits if ok to load is unchecked).

Funding Section Errors: Users of the CAT will need to be able to save the CAT page even if certain funding errors exist (math errors related to different funding splits). This will allow them to do things such as work with other CAT users to finalize the funding data for shared employees.

Compensation Section Errors: Additionally, users of the CAT will need to be able to upload empl records to the CAT via the IPS to CAT process using the append option. In this process, compensation increases for an empl record in the spreadsheet will add to existing compensation increases in the CAT. Thus, a user (or two different users) could load the same action reason increase with different percentages for the same empl record. A report is needed to capture this duplication, and edit so there is only one row for each action reason in the CAT.

Users of the CAT will need to be able to quickly identify any empl record with an error on a single consolidated report. Throughout the budgeting cycle, this report will be run error by error to clean up multiple action reasons, invalid funding strings, and a variety of math errors in the funding section. Towards the end of the budgeting cycle, users will run this entire report to clean up the final record errors.

This report will serve as an update notification of all these errors. Users will need to then review the records on this report, and correct the error in the CAT before the CAT is locked. Once corrected the error row for that employee will fall off the report.

Process Inputs

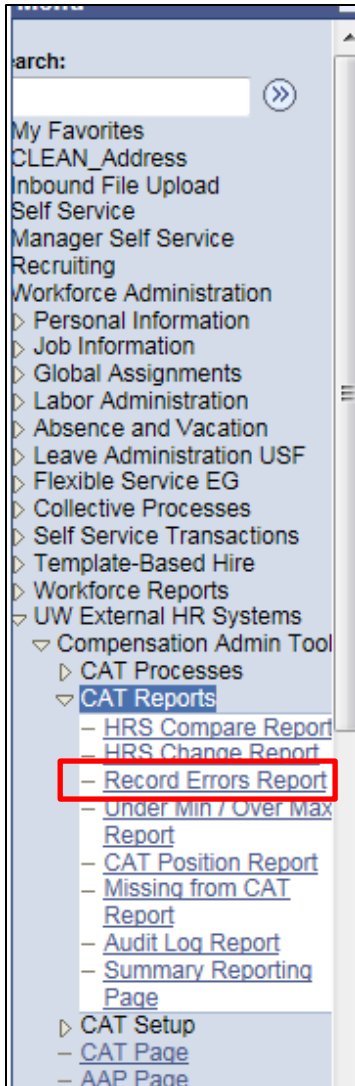
- Fiscal Year
- Effective Dates
- Business Unit
- Division (Optional)
- Department (Optional)
- Employee Class

Process Outputs

- Excel document with a population that meets the run control criteria and has an error in the CAT.

Procedure Steps

1. Navigate to **Workforce Administration > UW External HR Systems > Compensation Admin Tool > CAT Reports > Record Errors Report.**



2. Click Search under the Find an Existing Value tab to select a previously created Run Control ID, or create a new Run Control ID by selecting **Add a New Value**. To create a new Run Control ID, assign a unique identifier as the Run Control ID (eg. initials_date_etc.) into the Run Control ID box and select **Add**.
3. *Note: Run Control ID sets the report parameters. Users can create one ID, and use it to process multiple reports/processes, or create a new ID for each report/process.*

Record Errors Report

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

4. Enter parameters to define criteria for the Record Errors Report.
 - a. Select the upcoming **Fiscal Year** used for CAT budgeting planning purposes. This field will default to the latest fiscal year setup in the CAT.
 - b. Select a **Business Unit**.
 - c. If desired, select a **Division**.
 - d. If desired, select a **Department**.
 - i. If available, the **Department** field will become editable when the user selects a Division from the search tool or enters one manually and presses the tab button out of the field.
 - e. Click **Select Values** in the employee class box if you wish to exclude certain employee classes from the report. The default is for all employee classes to be included. Employee classes that are not included in the CAT will not pull onto CAT reports.
 - f. Select the types of errors you wish you view in the output by checking the associated boxes
 - i. If compensation errors are included in the run control, an effective date range must be chosen by pressing the **Effective Dates** buttons next to the From Date and To Date.
 - g. Click **Save** in the bottom left to save the parameters for the report.
 - h. Click **Run** in the top right to run the report.

Record Errors Report Run

Run Control ID: ABC01 [Report Manager](#) [Process Monitor](#) **Run**

Record Errors Report Run Parameters

*Fiscal Year: 2017
 *Business Unit: UWOSH
 Division:
 Department:
 Include Funding Edit Errors:
 Include Job Level Errors:
 Include Funding Section Errors:
 Include Compensation Errors: From Date: 07/01/2016 To Date: 06/30/2017

Employee Class
 Employee Class - All Values:
 Select Values

Save Return to Search Notify Add Update/Display

5. User will be automatically directed to the Process Scheduler Request page. From this page, select **OK**.

Process Scheduler Request

User ID: 00699002 Run Control ID: ABC01

Server Name: ▼ Run Date: 11/24/2015
 Recurrence: ▼ Run Time: 3:48:54PM Reset to Current Date/Time
 Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Record Errors Report	UW_CAT_RDERR	Application Engine	Web ▼	TXT ▼	Distribution

OK Cancel

6. Note the Process Instance number under the Process Monitor link. This designates the specific instance of the report run.

Record Errors Report Run

Run Control ID: ABC01 [Report Manager](#) [Process Monitor](#) [Run](#)

Process Instance: 2082045

Record Errors Report Run Parameters

*Fiscal Year: 2017

*Business Unit: UWOSH

Division:

Department:

Employee Class

Employee Class - All Values:

Select Values

Include Funding Edit Errors:

Include Job Level Errors:

Include Funding Section Errors:

Include Compensation Errors:

From Date: 07/01/2016 To Date: 06/30/2017

Save Return to Search Notify Add Update/Display

7. Click **Process Monitor** at the top right of the window.
8. Search for your process instance number under Process List, which will indicate the status of the report generation. When the report is complete, Run Status will be "Success" and Distribution Status will be "Posted".
 - a. If Run Status is "Queued," it indicates that the report generation is waiting to start.
 - b. If Run Status is "Processing," it indicates that the report generation is processing.
 - c. Click **Refresh** at the top right of the window to refresh the status of the document.
9. Once the Run Status hits "Success" and the Distribution Status hits "Posted," download the output.
 - a. Click **Details**.

Process List [Server List](#)

Actions

User ID: 00699002 Type: Last 1 Days [Refresh](#)

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List [Personalize](#) | [Find](#) | [View All](#) | [First](#) | 1-7 of 7 | [Last](#)

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2082045		Application Engine	UW_CAT_RDERR	00699002	11/24/2015 3:48:54PM CST	Success	Posted	Details

- b. Click **View Log/Trace** at the bottom right of the window.

Process Detail

Process

Instance 2082045	Type Application Engine
Name UW_CAT_RDERR	Description Record Errors Report
Run Status Success	Distribution Status Posted

Run

Run Control ID ABC01
Location Server
Server PSUNX
Recurrence

Update Process

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

Date/Time

Request Created On 11/24/2015 3:49:14PM CST
Run Anytime After 11/24/2015 3:48:54PM CST
Began Process At 11/24/2015 3:49:39PM CST
Ended Process At 11/24/2015 3:49:52PM CST

Actions

[Parameters](#) Transfer
[Message Log](#) [View Locks](#)
[Batch Timings](#)
[View Log/Trace](#)

OK

Cancel

- c. Under File List, click the file with the .xls extension to download the output. Note: you may have two .xls outputs if you have any additional splits.

View Log/Trace

Report

Report ID: 1168723 Process Instance: 2082045 [Message Log](#)

Name: UW_CAT_RDERR Process Type: Application Engine

Run Status: Success

Record Errors Report

Distribution Details

Distribution Node: HRDEV_RPTNOD Expiration Date: 11/23/2016

File List

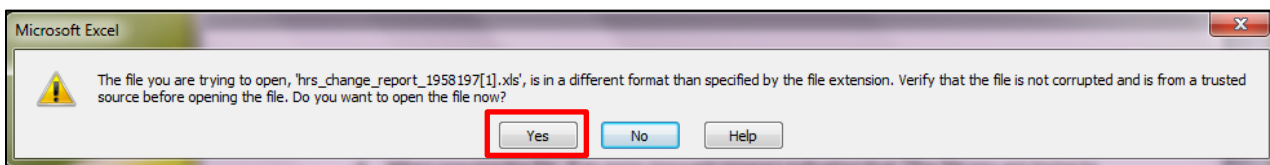
Name	File Size (bytes)	Datetime Created
AE UW CAT RDERR 2082045.AET	4,214	11/24/2015 3:49:52.715402PM CST
AE UW CAT RDERR 2082045.log	535	11/24/2015 3:49:52.715402PM CST
AE UW CAT RDERR 2082045.trc	205	11/24/2015 3:49:52.715402PM CST
CAT Record Errors Rpt 2082045.xls	8,772	11/24/2015 3:49:52.715402PM CST

Distribute To

Distribution ID Type	*Distribution ID
User	00699002

[Return](#)

- d. When opening the file, if an error message appears indicating that “The file you are trying to open...is in a different format than specified by the file extension,” click **Yes**.



10. Review the report.
- a. The excel output file will look like the **screenshot below**:

Record Errors Report											
Report Params:											
Run Control ID:	Test_01					Process Instance:	1958095				
Run Date:	11/2/2015					Run By:	HREE609				
Fiscal Year:	2018					Include Job Level Errors:	Y				
Business Unit:	UWADM					Include Funding Edit Errors:	Y				
Division:						Include Funding Section Errors:	Y				
Department:						Include Compensation Errors:	Y				
Employee Class:	AS,CJ,CL,CP,ET1,ET2,ET3,ET4,FA,LI,OT1,OT2,OT3,OT4,OT5,OT6,SA1,SA2,SA3,SA4,SA5,SA6,SA7,SH					Compensation Date Window:	06/01/2017	06/30/2018			
Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9	Column 10	Column 11	
JOB LEVEL ERRORS	COMPENSATION ERRORS	FUNDING EDIT ERRORS	FUNDING ERRORS	ERROR MESSAGE	NAME	EMPLID	EMPL RCD	HOME DEPT	EMPL CLA		
X				Planned FTE = 0		00013134	1	W101000	OT1		
X				Planned FTE = 0		00013134	1	W101000	OT1		
X				Planned FTE = 0		00034112	0	Y701000	CP		
X				Planned FTE = 0		00034112	0	Y701000	CP		
X				Planned FTE = 0		00034112	0	Y701000	CP		
X				Planned FTE = 0		00034112	0	Y701000	CP		
X				Planned FTE = 0		00051084	0	W286000	CP		
X				Planned FTE = 0		00080221	0	W451000	CL		
X				Planned FTE = 0		00080221	0	W451000	CL		
X				Planned FTE = 0		00155853	0	W282500	CP		
X				Planned FTE = 0		00254067	0	W265000	CP		
X				Planned FTE = 0		00406046	0	W101000	CL		
X				Planned FTE = 0		00406046	0	W101000	CL		
X				Planned FTE = 0		00706217	0	W010500	SH		
X				Planned FTE = 0		00706217	0	W010500	SH		
X				Planned FTE = 0		00709497	0	W010500	SH		
X				Planned FTE = 0		00709497	0	W010500	SH		
X				Planned FTE = 0		00738199	1	W010200	SH		
X				Planned FTE = 0		00738199	1	W010200	SH		
X				Planned FTE = 0		00748242	0	W010200	SH		
X				Planned FTE = 0		00748242	0	W010200	SH		
X				Planned FTE = 0		00754092	1	W010200	SH		
X				Planned FTE = 0		00754092	1	W010200	SH		

- b. The report is displays four different types of errors, demarcated for each string by an X under the specific record type.
- c. Emplrcls may appear in multiple sections of the report
- d. Emplrcls will likely appear as multiple rows within each section because:
 - i. Emplrcls with more than one error will appear as multiple rows on the report
 - ii. Compensation increases and funding splits are added as horizontal rows under each employee such as follows:

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
JOB LEVEL ERRORS	COMPENSATION ERRORS	FUNDING EDIT ERRORS	FUNDING ERRORS	ERROR MESSAGE	NAME	EMPLID	EMPL RCD
X				Planned FTE = 0	JESSICA	00034112	0
X				Planned FTE = 0	JESSICA	00034112	0
X					JESSICA	00034112	0
X					JESSICA	00034112	0

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
JOB LEVEL ERRORS	COMPENSATION ERRORS	FUNDING EDIT ERRORS	FUNDING ERRORS	ERROR MESSAGE	NAME	EMPLID	EMPL RCD
	X			Action reason occurs more than once	JESSICA	00034112	0
	X			Action reason occurs more than once	JESSICA	00034112	0
	X				JESSICA	00034112	0
	X				JESSICA	00034112	0

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
JOB LEVEL ERRORS	COMPENSATION ERRORS	FUNDING EDIT ERRORS	FUNDING ERRORS	ERROR MESSAGE	NAME	EMPLID	EMPL RCD
			X		JESSICA	00034112	0
			X		JESSICA	00034112	0
			X	Total Funding Distribution Percent must equal to 100%	JESSICA	00034112	0
			X	Total Funding Distribution Percent must equal to 100%	JESSICA	00034112	0

- e. A description of the different header fields is displayed in **Table 1** below.
- f. A description of error messages, grouped by error type is displayed in **Table 2** below.
- g. A description of column headers past the error columns is displayed in **Table 3** below.

Tables

Table 1: Output Header Fields	
Report Parameters	
Field Name	Description
Run Control ID	The run control identification entered when report was created.
Run Date	The date the report was created.
Fiscal Year	The Fiscal Year for which the report is pulling data.
Business Unit	The Business Unit selected in the run control.
Division	The Division (if any) selected in the run control.
Department	The Department (if any) selected in the run control.
Employee Class	The Employee Class as selected in the run control
Process Instance	The number assigned by PeopleSoft for each process.
Run By	The user ID of the user who ran the report.
Include Job Level Errors	Y/N dependent on whether Job Level Errors were selected in the run control.
Include Funding Edit Errors	Y/N dependent on whether Funding Edit Errors were selected in the run control
Funding Section Errors	Y/N dependent on whether Funding Edit Errors were selected in the run control.
Include Compensation Errors	Y/N dependent on whether Compensation errors were selected in the run control.
Compensation Date Window	The effective dates for the compensation errors section.

Table 2: Error Messages	
Job Level Errors	
Error	Error Message in Column 5
Planned FTE is 0 for an employee	Planned FTE = 0
Planned FTE is greater than one across multiple empl records	Planned Fte > 1 on multiple empl records
Compensation Errors	
Error	Error Message in Column 5

Multiple CAT increases, same action reason	Action reason occurs more than once
Identical Action Reason exists in the CAT and in HRS (as of the effective date window you assign on the run control)	Identical action reason exists in the CAT and in HRS
\$0 comp change amount entered	\$0 amount entered in comprate change field

Funding Edit Errors

Error	Error Message in Column 5
The funding string combination for Fund Code and Scenario is not valid	Combo error for fields FUND_CODE/ SCENARIO in group SCENARIO.
The funding string combination for Department, Fund Code, and Program Code is not valid	Combo error for fields DEPTID/ FUND_CODE/ PROGRAM_CODE in group ORGEDIT.
The funding string combination for Fund Code and Program Code is not valid	Combo error for fields FUND_CODE/ PROJECT_ID in group FNDPRJ.
The funding string combination for Project ID and Fund Code is not valid	Combo error for fields PROJECT_ID/ FUND_CODE in group PRJ_FUND.

Funding Errors

Error	Error Message in Column 5
No funding has entered, salary will not add to summary totals	No Funding Information Entered in the CAT
Funding distribution is greater or less than 100%	Total Funding Distribution Percent must equal to 100%
On an individual funding split, Distribution Percentage, Budgeted FTE, or Budgeted Amount = 0	Funding split distribution percent is 0

Funding Edit

Error	Error Message in Column 5
The funding string combination for Fund Code and Scenario is not valid	Combo error for fields FUND_CODE/ SCENARIO in group SCENARIO.
The funding string combination for Department, Fund Code, and Program Code is not valid	Combo error for fields DEPTID/ FUND_CODE/ PROGRAM_CODE in group ORGEDIT.
The funding string combination for Fund Code and Program Code is not valid	Combo error for fields FUND_CODE/ PROJECT_ID in group FNDPRJ.
The funding string combination for Project ID and Fund Code is not valid	Combo error for fields PROJECT_ID/ FUND_CODE in group PRJ_FUND.

Table 3: Report Columns

Column	Description
NAME	First and Last name pulled from HRS

EMPLOYEE ID	EmplID pulled from the CAT
EMPLOYEE RECORD NUMBER	Empl Record pulled from the CAT
HOME DEPT	Home Department from the CAT
EMPLOYEE CLASS	Employee Class pulled from the CAT
PAY BASIS	Pay Basis pulled from the CAT
POSITION NUMBER	Position number pulled from the CAT
JOB CODE	JobCode pulled from the CAT
TITLE	Job Title pulled from the CAT
PLANNED TITLE	Planned Title pulled from the CAT
PLANNED FTE (FROM CAT)	Planned FTE pulled from the CAT
HRS ACTION REASON	<p>For Compensation Errors, pull the action reason from HRS, that falls within the defined effective dated window, for which an identical action reason has been entered in the CAT.</p> <p>If multiple identical action reasons exist between the CAT and HRS, pull only the max effective dated/seq one from HRS.</p> <p>Note: If the error is not an HRS/CAT duplicate action reason error the field will appear blank</p>
HRS CHANGE AMOUNT	<p>For Compensation Errors, pull comprate change amount associated with the duplicate action reason from HRS (max effective dated/seq that falls within the defined effective dated window).</p> <p>If the error is not an HRS/CAT duplicate action reason error, this field will appear blank.</p>
CAT ACTION REASON	<p>For Compensation Errors, pull the action reason from the CAT for which a duplicate action reason exists either in HRS, or in the CAT (has been loaded via a spreadsheet upload process)</p> <p>For non-Compensation Errors, pull the first action reason from the CAT.</p>
CAT CHANGE AMOUNT	<p>For Compensation Errors, pull the comprate change amount from the CAT associated with Increase 1 Action Reason (for which a duplicate action reason exists either in HRS, or in the CAT (has been loaded via a spreadsheet upload process)).</p> <p>For non-Compensation Errors, pull the comprate change amount associated with the first action reason from the CAT.</p>
TOTAL COMP RATE	Updated Compensation Rate pulled from the CAT
GL BUSINESS UNIT	Pull the GLBU from the account code in the CAT – funding string 1
FUND	Pull the Fund Code of this empl record from the account code in the CAT - funding string 1
DEPARTMENT ID	Pull the DeptID of this empl record from the account code in the CAT - funding string 1
PROGRAM	Pull the Program of this empl record from the account code in the CAT - funding string 1

PROJECT ID	Pull the ProjectID of this empl record from the account code in the CAT - funding string 1
DISTRIBUTION PERCENT	Pull distribution percentage of first funding split of empl record with error from the CAT- funding string 1
BUDGETED FTE	Pull budgeted FTE of first funding split of empl record with error from the CAT- funding string 1
FUNDING OK TO LOAD	OK to load to CAT