

# KB - Under Min/Over Max Report

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## Purpose and Overview

This report displays employee records where an individual's (or a vacant's) updated budget salary (updated salary including adjustments entered into the CAT) is above or below the rate for that title in HRS. Title min/maxes will be pulled from HRS as of the beginning of the next fiscal year. Employee records that have an over max/under min error will continue to appear on this report unless their updated Comrates are changed in the CAT to be within the salary range (even if they are approved to be over max/under min).

For Madison employees, the ESR (Extraordinary Salary Range) min/maxes will appear on this report as separate columns from the HRS min/maxes. If a Madison employee record has an ESR, the logic of this report will compare their updated CAT salary to the ESR range, and ignore the HRS range.

## Process Inputs

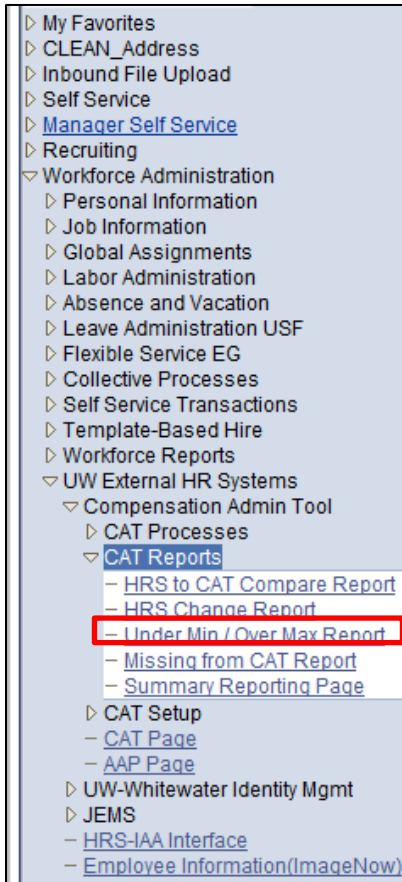
- Fiscal Year
- Business Unit
- Division (optional)
- Department (optional)
- Empl Class
- Include Vacants Checkbox

## Process Outputs

- Excel document with all employee records (or vacant positions) that meet the run control criteria and have an under min/over max error.

## Procedure Steps

1. Navigate to **Workforce Administration > UW External HR Systems > Compensation Admin Tool > CAT Reports > Under Min/Over Max 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.*

**Under Min / Over Max Report**

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

Run Control ID:

**Add**

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

4. Enter parameters to define criteria for the Under Min/Over Max 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. Check or Uncheck the **"Include Vacants" Checkbox**.
    - i. Leaving the checkbox checked will pull Vacant positions from the AAP whose Full Time Rate is under the min or over the max for the Job Code entered in the AAP.
    - ii. Unchecking the checkbox will ensure that only CAT positions that are under the min or over the max will appear on the report.
  - f. 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.
  - 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.

**Under Min / Over Max Report**

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

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**Under Min / Over Max Report Run Parameters**

\*Fiscal Year: 2017

\*Business Unit: UWPKS

Division:

Department:

Include Vacants:

**Employee Class**

Employee Class - All Values:

**Select Values**

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: 11/30/2015

Recurrence:       Run Time: 9:47:35AM     

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Under Min / Over Max Report	UW_CAT_MXRPT	Application Engine	Web	TXT	<a href="#">Distribution</a>

6. User will be directed back to Under Min/Over Max Report Page. Select "Process Monitor" to view Process list.

**Under Min / Over Max Report**

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

Process Instance: 2082275

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**Under Min / Over Max Report Run Parameters**

\*Fiscal Year

\*Business Unit

Division

Department

Include Vacants:

**Employee Class**

Employee Class - All Values:

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](#)

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**Actions**

User ID   Type  Last   Days

Server  Name   Instance  to

Run Status  Distribution Status   Save On Refresh

Process List									
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2082275		Application Engine	UW_CAT_MXRPT	00699002	11/30/2015 9:47:35AM CST	Success	Posted	<a href="#">Details</a>

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

## Process Detail

### Process

**Instance** 2082275      **Type** Application Engine  
**Name** UW\_CAT\_MXRPT      **Description** Under Min / Over Max 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** 11/30/2015 9:49:44AM CST  
**Run Anytime After** 11/30/2015 9:47:35AM CST  
**Began Process At** 11/30/2015 9:50:07AM CST  
**Ended Process At** 11/30/2015 9:51:05AM 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: 1168947      Process Instance: 2082275      [Message Log](#)

Name: UW\_CAT\_MXRPT      Process Type: Application Engine

Run Status: Success

Under Min / Over Max Report

**Distribution Details**

Distribution Node: HRDEV\_RPTNOD      Expiration Date: 11/29/2016

**File List**

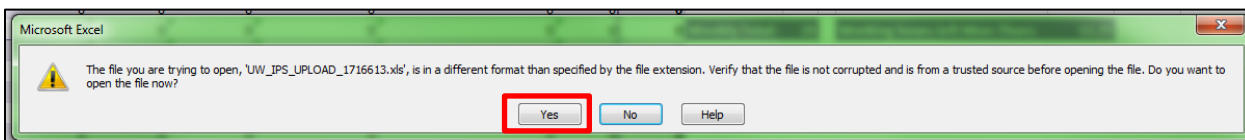
Name	File Size (bytes)	Datetime Created
<a href="#">AE UW CAT MXRPT 2082275.AET</a>	3,504	11/30/2015 9:51:05.844001AM CST
<a href="#">AE UW CAT MXRPT 2082275.log</a>	535	11/30/2015 9:51:05.844001AM CST
<a href="#">AE UW CAT MXRPT 2082275.trc</a>	205	11/30/2015 9:51:05.844001AM CST
<a href="#">Min Max Report 2082275.xls</a>	8,380	11/30/2015 9:51:05.844001AM CST

**Distribute To**

Distribution ID Type	*Distribution ID
User	00699002

[Return](#)

- d. When opening the file in Excel, 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**.



- e. Note that different internet browsers may have different opening processes.
10. Review the output file.
- Open the downloaded Excel file.
    - A description of the different header and column fields found in the output is below.
    - The output file will look like the screenshot below.

Under Min / Over Max Report							
<b>Report Parameters:</b>							
Run Control ID:	ABC01	Process Instance:	2082275				
Run Date:	11/30/2015	Run By:	00699002				
Fiscal Year:	2017	Business Unit:	UWPKS				
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	Department:					
Include Vacants:	Y						
Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
HOME/FUNDING DEPT	NAME	EMPLID	EMPL RCD	AAP TYPE	ADJ TYPE	NBR	POSITION EMPL CLASS

- Review all employee records (and Vacant positions) on this report, and lower their CAT adjustments so that their salary falls within the HRS Min/Max (or ESR min/max) range.
- If an employee record has been approved for over max, the Approved for Over Max column will be populated with a Y. In these cases, their updated CAT Salary may be above the HRS Max.

## Tables

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 selected in the run control
Employee Class	The employee classes included on the report's run control.
Division	The Division (if any) selected in the run control.
Include Vacants	Include Vacants as selected on 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.
Business Unit	The Business Unit selected in the run control.
Department	The Department (if any) selected in the run control.
Report Columns	
Column	Description
HOME DEPT/ FUNDING DEPT FOR VACANTS	The Home Department of the employee record from the CAT. The Funding Department of the Vacant Position from HRS.
NAME	The Name of the employee record from HRS. This field will appear blank for Vacant positions.
EMPLOYEE ID	The Employee ID of the employee record from HRS. The field will appear blank for Vacant positions.
EMPLOYEE RECORD	The Employee Record Number from the CAT. The field will appear blank for Vacant positions.
POSITION TYPE (AAP)	The Position Type from the AAP for vacant positions. This field will appear



LABEL)	blank for CAT jobs.
ADJUSTMENT TYPE (AAP LABEL)	The Adjustment Type field from AAP for Vacant Positions. This field will appear blank for CAT jobs.
POSITION NUMBER	The Position Number of the employee record from CAT, or the vacant position from the AAP.
EMPL CLASS	The Employee Class of the employee record from CAT. The field will appear blank for Vacant positions.
PAY BASIS	The Pay Basis of the employee record from CAT. The field will appear blank for Vacant positions.
PLANNED FTE	The Home Department of the employee record from CAT, or the vacant position from the AAP.
JOB CODE	The Job Code of the employee record from CAT, or the vacant position from the AAP.
TITLE	The Title of the employee record from CAT, or vacant position from the AAP.
SALARY PLAN	The Salary Plan of the employee record from HRS, or vacant position from the AAP.
SALARY GRADE	The Salary Grade of the employee record from HRS, or vacant position from the AAP.
FULL TIME RATE	The Full Time Rate of the employee record from HRS, or vacant position from the AAP.
HOURLY MINIMUM	The minimum of the salary grade associated with the job code/employee record from HRS, or associated with the job code/vacant position from the AAP.
HOURLY MAXIMUM	The maximum of the salary grade associated with the job code/employee record from HRS, or associated with the job code/vacant position from the AAP.
ANNUAL MINIMUM	The minimum of the salary grade associated with the job code/employee record from HRS, or associated with the job code/vacant position from the AAP.
ANNUAL MAXIMUM	The maximum of the salary grade associated with the job code/employee record from HRS, or associated with the job code/vacant position from the AAP.
OVER MAX FLAG	Yes/No based on the checkbox from HRS
ESR MINIMUM	Extraordinary salary range minimum (if available) for a job code/ position number in the UWMSN Business Unit. This field will appear blank for vacant positions.
ESR MAXIMUM	Extraordinary salary range maximum (if available) for a job code/ position number in the UWMSN Business Unit. This field will appear blank for vacant positions.
ERROR MESSGE	Type of error associated