General Overview

HR cares about people: who it is, what they do, where they do it, and how much they are paid.

Finance cares about the numbers, how much, which department (fund, etc.), and what month.

The HR system produces an interface that feeds into the Finance system for each month's payroll. However, only high level totals are available in Finance, so while you can view salary expenses through the Finance system, you cannot see who is linked to those salary expenses.

This training is for HR end-users with read-only/restricted access to the PeopleSoft HR system who have attended detailed training in PeopleSoft Finance. It will provide you with access to the HR/Payroll Reporting instance so that you can determine who was included in a salary expense. Those of you who use HR Recruit Workforce in the production instance will have an additional login to access the HR reporting instance.

System access to the PeopleSoft HR application is defined by your role as a user and by the department(s) of employees that you are authorized to view (Row Level security). Your current role may not include all the departments that you are responsible for, we took our best shot. Please contact Payroll to report additional departments that need to be added to your user profile.

We have encountered some problems with row level security and are currently working on reports to help resolve that problem, however like you've heard before, this is a work in progress and you will be updated to changes and improvements.

(March 2005)

Where to Login to HR RPT

URL:
https://cmsweb.humboldt.edu/servlets/iclientservlet/HHUMRPT/?cmd=login

The link listed above can be added to your list of favorites on your internet browser.

Or you can go to the HSU-CMS home page http://www.humboldt.edu/~cms/.
Under Quick Links, in the lower left hand corner, click on Payroll Reporting.

Once you have logged in to People Soft using the assigned password it is a good idea to change it to something you can remember. It must be at least 6 characters long and should contain at least 1 number and 1 symbol. This is done under People Tools, Maintain Security.

Note: the HR login screen looks exactly like the Finance login screen. The only difference is the URL.

Both Finance and HR are Web-based applications, but they are on different specific versions. HR runs on HRSA 8.0 while Finance runs Finance 8.4. This means that both products are similar but they may look, feel and act a bit differently. But if you learned to navigate, change your password, and run queries in Finance you'll be able to do the things in HR too.


HR REPORT USER Data Access

- **Develop Work Force**
    - **Position Management**
        - *Use*
            - Position Data

- **Administer Workforce**
    - **Administer Workforce**
        - *Use*
            - Personal Data
            - Job Data

- **People Tools**
    - **Maintain Security**
        - *Use*
            - My Profile
    - **Process Monitor**
        - *Inquire*
            - Process Requests (currently not used)
    - **Query Manager**
        - *Use*
            - Query Manager

People Tools
Query Manager

Navigate to People Tools, Query Manager, Use, Query Manager.

You will see the following screen. Note there is one bogus thing on this screen; Create New Query does not work! You can access queries by name, begins with or contains, or simply by typing HUM or HSU in the empty box. <u>You do have to hit the search button.</u>
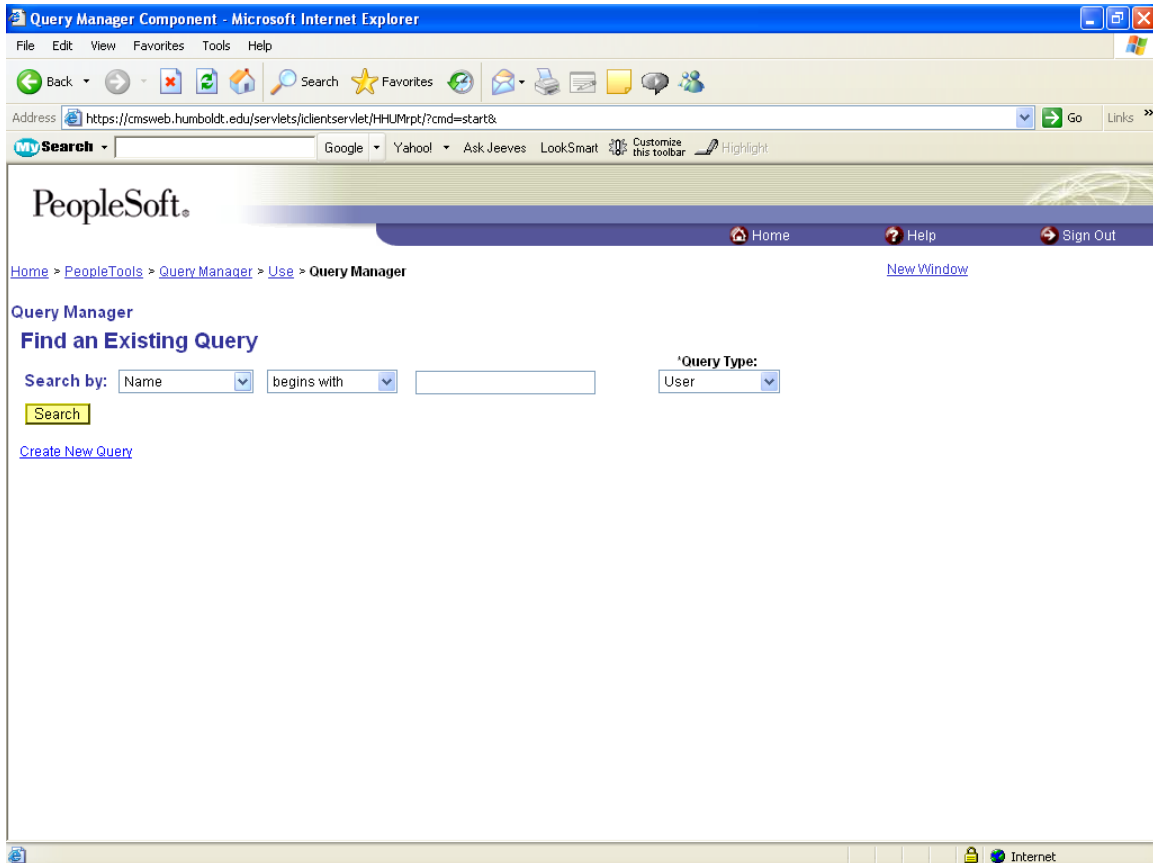
The queries available to you are listed on the next page.

Query		View All	First ◁ 1-21 of 21 ▷ Last
HSU_DEPT_ACCT_CODES	Account Codes by Department	Public	Delete Rename Run
HSU_EE_ACCTCD_BY_DEPT	EE Account Codes by Department	Public	Delete Rename Run
HUM_BUD_LABORCOST	Available Departments	Public	Delete Rename Run
HUM_GL_PAY_DED_BY_ID	Pay Deduct Distrib by Emplid	Public	Delete Rename Run
HUM_GL_PAY_DED_PERIOD	Pay Deduct Distrib All	Public	Delete Rename Run
HUM_GL_PAY_DED_PERIOD_BY_DEPT	Pay Deduct Distrib All by Dept	Public	Delete Rename Run
HUM_GL_PAY_DEPTS_AVAIL	Available Departments	Public	Delete Rename Run
HUM_GL_PAY_ERN_BY_ID	Pay Earnings Distrib by Emplid	Public	Delete Rename Run
HUM_GL_PAY_ERN_PERIOD	Pay Earnings Distrib All	Public	Delete Rename Run
HUM_GL_PAY_ERN_PERIOD_BY_DEPT	Pay Earnings Distrib by Dept	Public	Delete Rename Run
HUM_GL_PAY_SUMMARY	Pay Cycles To-Date - Summary	Public	Delete Rename Run
HUM_GL_PAY_TAX_BY_ID	Pay Tax Distrib by Emplid	Public	Delete Rename Run
HUM_GL_PAY_TAX_PERIOD	Pay Tax Distrib All	Public	Delete Rename Run
HUM_GL_PAY_TAX_PERIOD_BY_DEPT	Pay Tax Distrib by Dept	Public	Delete Rename Run
HUM_LABRCST_APERIOD_ACCT	Labor Exp by dept,acct,aperiod	Public	Delete Rename Run
HUM_LABRCST_APERIOD_DEPT	Labor Exp by dept, acct period	Public	Delete Rename Run
HUM_LABRCST_APERIOD_FUND	Labor Exp fund,dept,acct,aprd	Public	Delete Rename Run
HUM_LABRCST_YTD_ACCT	Labor Exp year-date dept, acct	Public	Delete Rename Run
HUM_LABRCST_YTD_DEPT	Labor Exp year-date dept	Public	Delete Rename Run
HUM_LABRCST_YTD_EMPL	Labor Exp year-date employee	Public	Delete Rename Run
HUM_LABRCST_YTD_FUND	Labor Exp year-date fund	Public	Delete Rename Run

Running Queries

To run a query, click the word **Run.** If you select the query name link instead, it will take you into the Query workspace (unlike Viewer in Finance that simply runs the query). It is not harmful to do this, it is just an extra step. To run the query from inside the workspace you have to go to the bottom of the page and hit run.

Many of these queries were originally written for Fiscal to do accounting work. So, there may be some fields you don't care about. Some were an attempt to duplicate the FRS payroll screen data. Those you will find useful for looking up information on a specific individual.

These queries are currently your chief source of HR Labor Cost Distribution Data.

HUM_GL_PAY_DEPTS_AVAIL shows which departments you can see in HR.

HUM_GL_PAY_SUMMARY shows which pay periods are currently available in HR. It also provides the pay period ending date, which is a required parameter in many of the queries. It is generally, but not always, the last calendar day of the pay month.

The other HUM_GL_PAY_xxx queries present identity, job/position, and accounting information by individual or by department. These queries are split into three groups by account type: earnings accounts (ERN), deduction accounts (DED), and tax accounts (TAX). You must run all three to get complete payroll information for any entity.

The HUM_LABRCST queries provide all account types within one result, and additional ways to ask for data. They show fewer fields than the HUM_GL_PAY queries.

Important Note on Departments!
You will see two different "department" fields appearing in HR payroll queries. The first, "DeptID", refers to the HR department: the department to which the employee belongs. This is what your HR security is based on. The second, "Department", is the Finance department: the department to which the payroll expense is being charged. This is what shows up in Finance reports. The two are not necessarily identical.

Thus, if there is an employee in your department being paid by another department, you will see it in your HR queries but not in your Finance reports. Conversely, if there is an employee for whom your department is paying but who lives in another department, you will see them in your Finance reports but not in your HR queries. If your Finance reporting doesn't reconcile with your HR detail and you can't tell why, you may need to contact Payroll or Accounting for help.

Administer Workforce
          Personal Data

Personal data is just that, personal data. This series of screens contains confidential information about employees in your department, including social security number. This is a sensitive topic and we are under strict requirements to guard access to an individual's social security number. That is only one of many reasons for not sharing your password or leaving a screen open with information in view of anyone who walks into your area. PeopleSoft HR will log you out automatically if 20 minutes if you have not accessed the system.

[*screen shot removed for privacy reasons*]

Some of the data included in these panels are:

Name
Address
Phone
Original Hire Date
Gender
Highest Level of Education
Birth Date

Administer Workforce
        Job Data

This series of screens includes information related to a person's job.

[*screen shot removed for privacy reasons*]

Two data elements of interest to you are PeopleSoft position number and the HR account code.

PeopleSoft position number is located on the first page (Work Location tab). HR account code is located on the Payroll page or tab.

The PeopleSoft position number ties to the class number in the State Controller's position number string.

The HR account code is an abbreviation of the chartfield string. The HR account code consists of only the department number-fund type-account, and there may be a short description or number following. Example: D20042-GF-6011M0

There are two queries beginning with HSU that can be run by department to determine what account codes are available for you to use and to see what account code a person is currently assigned. They are:

HSU_EE_ACCTCD_BY_DEPT   EE Account Codes by Department

HSU_DEPT_ACCT_CODES   Account Codes by Department

Having problems with chartfield strings, account codes, PeopleSoft position numbers, state controller positions numbers and how they all relate? This may help.

Data Concepts and LCD in HR/Finance

Old System:

The State Controller's Position Number determined where salary expense posted. Payroll information was returned by the State Controller by Agency Unit Class and Serial Numbers. A loose translation is:

Agency = Fund
Unit = Department, Program or Project
Class and Serial = Account

Example: 225 - 108 - 2355 - 916

225 = General Fund
108 = Biological Science
2355-916 = Account # 3360 / Graduate Assistants

CMS System:

The State Controller's Position Number determines only to what agency and unit an expense is to be posted.

Example: 225 - 242 - 2354 - 001

225 = General Fund
242 = Biological Sciences

When the State Controller's payroll information is loaded into CMS, the system matches social security number and SCO position number, once a positive match is made it looks on the employee job record to find an HR Account Code. The HR Account Code is an abbreviation of the chartfield string.

Using the example above:

The Account Code would be D20042-GF-601103 – this points to the chartfield string of:

ACCOUNT	FUND	DEPARTMENT	PROGRAM	CLASS	PROJECT
601103	AE204	D20042	00000	00000	000000

Account = 601103 - Graduate Assistant
Fund = AE204 - General Fund
Department = D20042 - Biological Sciences
Program = None
Class = None
Project = None

This is a really basic example.

A more complex example would be:

SCO position number 225-249-2357-001

This is a summer session lecturer. The State Controller issues pay to Agency-225 (General Fund) and Unit - 249 (Math) however the employee's job record contains an HR Account Code of D20091-TF-6011M0-Summer. This points to a chart field string of:

ACCOUNT	FUND	DEPARTMENT	PROGRAM	CLASS	PROJECT
6011M0	TL001	D20091	00000	C1002	000000

Account   = Lecturer
Fund   = Extended Ed Trust Fund
Department = Extended Ed – Regular Academic Instruction
Program   = None
Class   =Ext Ed – Summer Session
Project   = None

So in this example the expense is posted to Extended Education and is separated from that department's other salary expenses by the Class number.

Position Management
Position Data

This allows you to view positions that are assigned to your department. It tells you who is in a position or if a position is open position. If you have multiple departments, the easiest way to look up this information is by department number. If you only have one department enter the Business Unit of HSUHR, this will return only the positions that you have access to view.

Example:

When you click on a position, again, you get a series of screens.
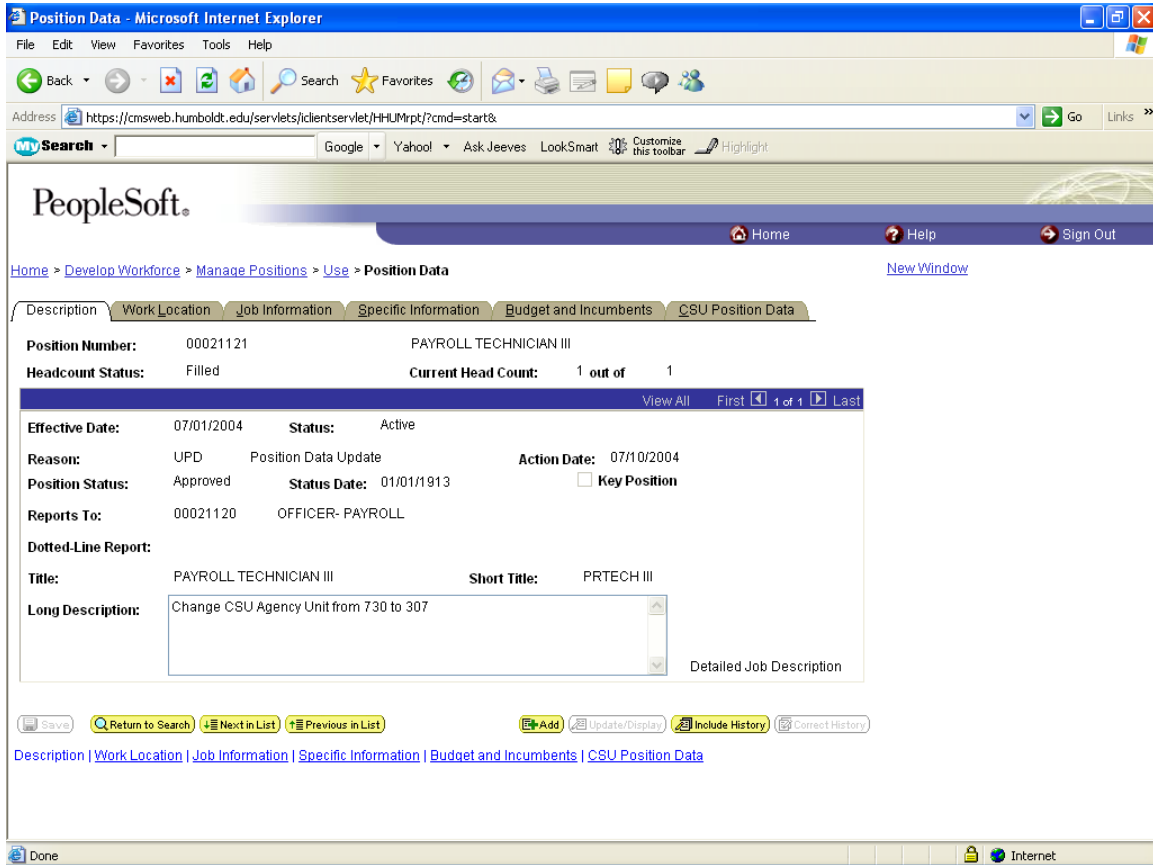
Two important screens are the first one – it gives you the PeopleSoft position number at the top. And Budget and Incumbents, it tells you who if anyone is in that position.

Positions have either a one to one relationship with an employee, like the old state controller's serialized position numbers or a multiple head count like temporary lecturers or student assistants.

The PeopleSoft position table was created from a download of information from the State Controller's system. Positions have been added as needed.   It was not created from or currently is intended to replace Budget's position inventory. That is another one of those works in progress.