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. You do have to hit the search button.

The queries available to you are listed on the next page.
<table>
<thead>
<tr>
<th>Query</th>
<th>View All</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HSU DEPT ACCT CODES</strong></td>
<td>Account Codes by Department</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HSU EE ACCTCD BY DEPT</strong></td>
<td>EE Account Codes by Department</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM BUD LABORCOST</strong></td>
<td>Available Departments</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY DED BY ID</strong></td>
<td>Pay Deduct Distrib by Emplid</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY DED PERIOD</strong></td>
<td>Pay Deduct Distrib All</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY DED PERIOD BY DEPT</strong></td>
<td>Pay Deduct Distrib All by Dept</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY DEPTS AVAIL</strong></td>
<td>Available Departments</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY ERN BY ID</strong></td>
<td>Pay Earnings Distrib by Emplid</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY ERN PERIOD</strong></td>
<td>Pay Earnings Distrib All</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY ERN PERIOD BY DEPT</strong></td>
<td>Pay Earnings Distrib by Dept</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY SUMMARY</strong></td>
<td>Pay Cycles To-Date - Summary</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY TAX BY ID</strong></td>
<td>Pay Tax Distrib by Emplid</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY TAX PERIOD</strong></td>
<td>Pay Tax Distrib All</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM GL PAY TAX PERIOD BY DEPT</strong></td>
<td>Pay Tax Distrib by Dept</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM LABRCST APERIOD ACCT</strong></td>
<td>Labor Exp by dept, acct, aperiod</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM LABRCST APERIOD DEPT</strong></td>
<td>Labor Exp by dept, acct</td>
<td>period</td>
<td></td>
</tr>
<tr>
<td><strong>HUM LABRCST APERIOD FUND</strong></td>
<td>Labor Exp fund, dept, acct, aprd</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM LABRCST YTD ACCT</strong></td>
<td>Labor Exp year-date dept, acct</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM LABRCST YTD DEPT</strong></td>
<td>Labor Exp year-date dept</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM LABRCST YTD EMPL</strong></td>
<td>Labor Exp year-date employee</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HUM LABRCST YTD FUND</strong></td>
<td>Labor Exp year-date fund</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

[screenshot 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:

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>FUND</th>
<th>DEPARTMENT</th>
<th>PROGRAM</th>
<th>CLASS</th>
<th>PROJECT</th>
</tr>
</thead>
<tbody>
<tr>
<td>601103</td>
<td>AE204</td>
<td>D20042</td>
<td>00000</td>
<td>00000</td>
<td>000000</td>
</tr>
</tbody>
</table>

- 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:

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>FUND</th>
<th>DEPARTMENT</th>
<th>PROGRAM</th>
<th>CLASS</th>
<th>PROJECT</th>
</tr>
</thead>
<tbody>
<tr>
<td>6011M0</td>
<td>TL01</td>
<td>D20091</td>
<td>00000</td>
<td>C1002</td>
<td>00000</td>
</tr>
</tbody>
</table>

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.