# HRIS HR Writer

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# Using this Training Manual

When you attend HRIS Training, this manual will be used to outline the  process.  In the class you will learn specifics on how to process an individual action.

After training, additional resources can be found on the HRIS Website, including a link to Self Directed Help.  This section of the training manual will provide an outline of the naming conventions and setup/flow of the training material.

## *Text Conventions*

The manual is setup using standard text conventions and distinct visual elements to make training easier to follow.

| Format | Meaning |
|---|---|
| **Bold** | Name of a Form/Field.<br>A manual title.<br>An emphasized word/phrase.<br>A placeholder for a user-defined value. |
| *Italics* | A key name.  For example, Shift and Enter are key names. |

## *Visual Elements*

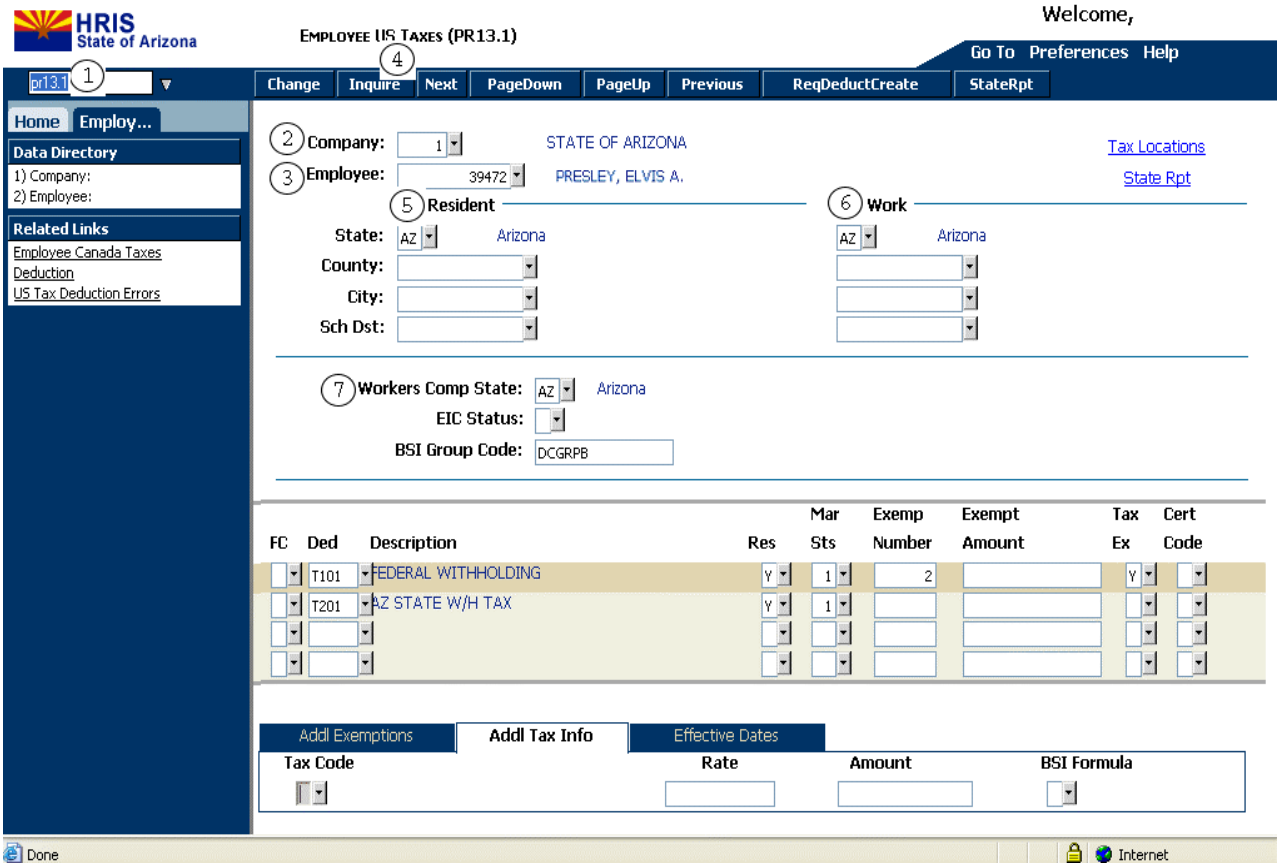
Visual elements are provided for certain types of information to draw your attention to that element/concept.

| Format | Meaning |
|---|---|
| | Tip – provides miscellaneous information about facts that might be of interest to you as you complete the process. |
| | Warning or Important Note – provides critical points or items that you must address as you complete the process. |
| | Exercise – indicates Exercise |

## *Screen Captures*

Screen Captures are provided prior to each Task Step Chart. The capture will identify the Form Name and Form Number according to the task. The numbers identified on the screen capture correspond to the numbered tasks in the chart.

**Example:**




## *Task Step Chart*

The Task Step Charts are set up to easily identify each necessary step taken with follow through explanation to make training easier to follow.

| Format | Meaning |
|---|---|
| **Number Column** | This number identifies, on the screen capture, the order the steps are to be taken (in sequence) |
| **HRIS FIELD** | This identifies the field on the form that your action is required. |
| **R/O** | This will tell you if the field you are working on is a **R**equired field or an **O**ptional field. |
| **Step/Action** | This will identify what needs to be entered in the current field. |
| **Notes/Additional Information** | This will identify Warning or Important Note – provides critical points or items that you must address as you complete the process. |

# HRIS Basics

HRIS has a number of standard features that work the same regardless of the field you are on in the system.

## *HRIS Forms*

- HRIS Forms will always open with the fields blank.
- When navigating in HRIS, you can move from field to field by pressing the Tab button on your keyboard, or clicking your mouse in each new field.
- You must then type or select from a drop down menu the items you want to fill into your fields. If you transfer from another HRIS form, some of the data from the previous form (ex. Company and Employee EIN) will fill in those same data items on the new form.

## *Comparing Fields on HRIS Forms*

There are key fields, which are required on HRIS Forms.

- All information should be entered in CAPITAL LETTERS.

  **Name:** ANDREW
- Do not use punctuation.
- **Address 1:** 456 ARROWHEAD LN
- Phone numbers are input with periods. (602.111.1111)
- Information is Added/Changed/Inquired on using the navigation bar. You can also use the buttons Next/Previous to move between Employee records.

## *HRIS System Messages*

- Always check the bottom left corner of a form for system messages such as "Add Complete-Continue."
- HRIS has built in edits to validate information. For example:
  - The Social Security Number is checked by HRIS to see that it is in the correct format and it does not already exist.

## *Terminology*

HR Writer training contains several terms that have important meanings. Many of these terms refer to tasks or actions you will perform using HR Writer.

| Term | Meaning |
|---|---|
| Click | Position the cursor over an object (such as a button, icon, tab or field) and press the left mouse button.<br><br>**Note** – This description applies to a standard pc mouse. If you have a different type of mouse, if you modify the settings of your mouse, or if you do not use a mouse, you must translate the meaning of "click" to what is appropriate for your setup. |
| Select | Identify an item to process. Selecting an item does not start a process.<br><br>For example, "select" refers to indicating which value you want from a field. Sometimes you select this value from a list of valid values, such as "Hourly" and "Salaried," and sometimes you select this value from the values listed in a Select dialog box. |
| Run | Send data for processing.<br><br>For example, run the HR170 report or run the batch job. |
| Type | In a form field, type the data and then move the cursor to the next field.<br><br>At a command line, type the letters exactly as written, then press **Enter**. |

## HR Writer Introduction

HRIS offers many standard and on-demand reports. If you have reviewed these reports and find that they do not address the specific needs of your agency, HR Writer may be the answer. HR Writer forms can be used to create new HRIS reports to meet agency specific needs.

This course will discuss the six HR Writer forms used to produce a basic HR Writer report. The forms include:

- HR Writer Title Creation (HR65.1)
- HR Writer Format Item Selection (HR65.2)
- HR Writer Format Item Order (HR65.3)
- HR Writer Print Order (HR65.4)
- HR Writer Population Selection (HR65.5)
- HR Writer Population Criteria (HR65.6)

There are additional forms in the HR Writer process, but these are used to create more complex reports. These additional forms will be discussed in the Advanced HR Writer Course.

**Notes**

- The HR Writer Forms may look similar, but they each serve very different functions. You will improve your ability to create and troubleshoot HR Writer reports if you focus on understanding how each form functions.
- When you run reports at your agency, your report results will only include data authorized by your HRIS job role.
    - If you are not currently assigned to a job role, your report will be blank.

## HR Writer Flow Chart

The HR Writer Forms must be used in a specific order to successfully create and run a report. You must complete the forms in this order. Some of the forms are required for every HR Writer report, and some forms are options – depending on the purpose of the report. The flow diagram in Figure 1 presents the forms, the required order and their overall purpose for HR Writer reports. The diagram also indicates whether the form is required or optional.

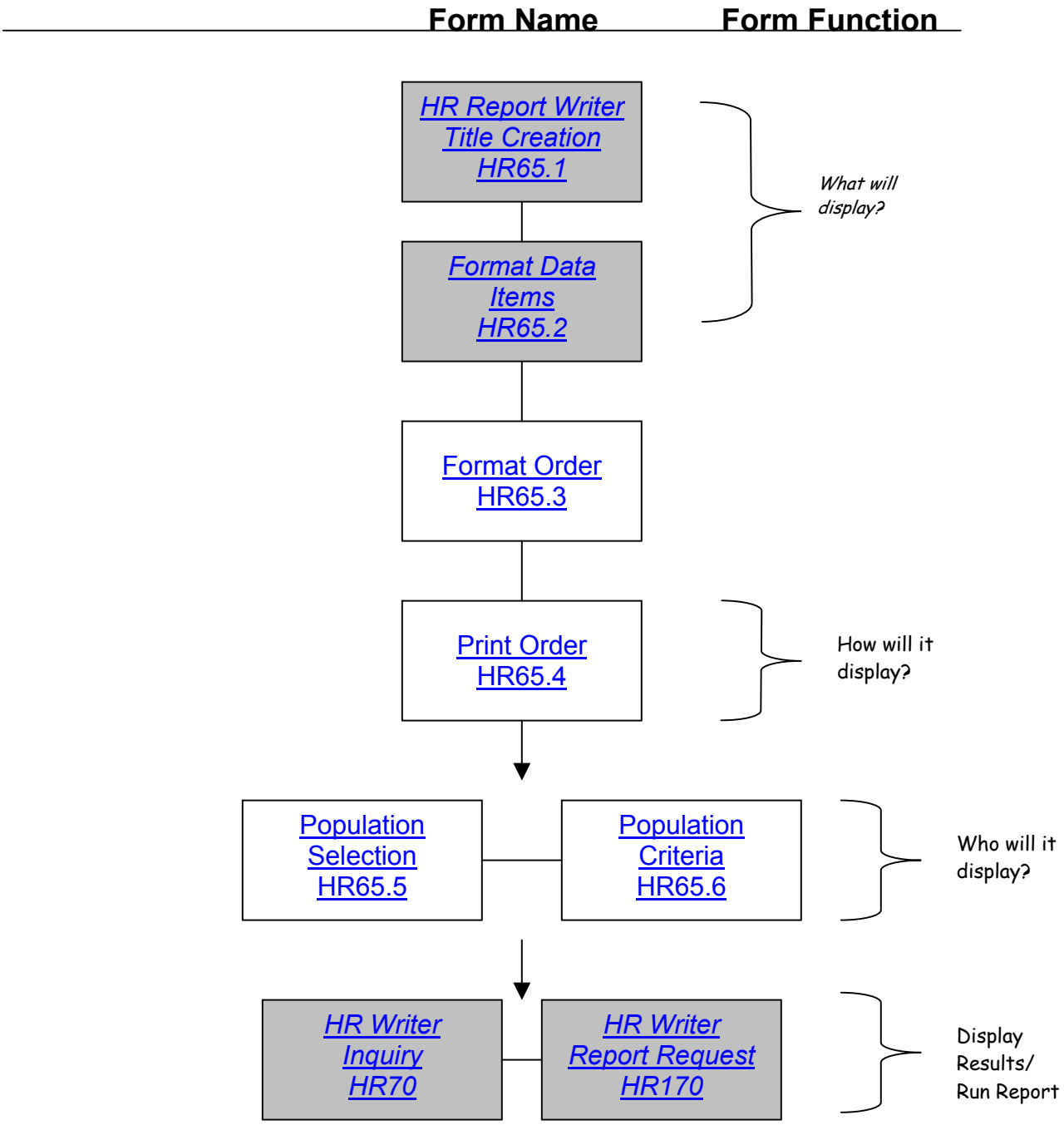
**Required forms appear as:**

*HR Report Writer*
*Title Creation*
*HR65.1*

**Optional forms appear as:**

HR Report Writer
Title Creation
HR65.1

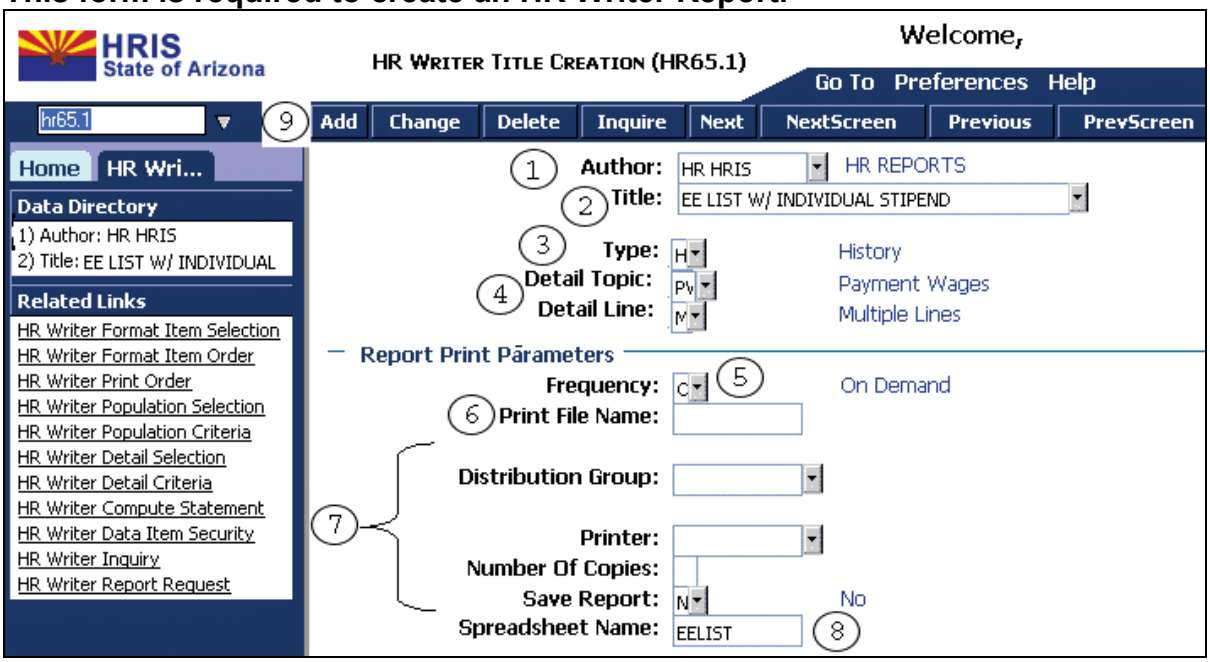
**Figure 1**
**BASIC FLOWCHART**



# HR Writer Form Details

## *HR Writer Title Creation (HR65.1)*

**This is the first form to complete.**
**This form is required to create an HR Writer Report.**




**To add a report title, complete the required fields below. Fields will be completed in numeric order.**

| | | | |
|---|---|---|---|
| **1** | **Author** field | Required | Select from the drop down list. Authors will be predefined in the HRIS system.<br><br>**Notes**<br>• Authors are used to group report titles together. All reports within a specific author can be run at the same time if desired.<br>  ○ **Example** – If all HR reports are grouped under one author. That author can then submit report criteria and run all HR reports together.<br>• Authors will be setup with a two-digit agency code, followed by 6 functional areas (HR, PR, BN, BUD, GL and MGT). You should create your report in the author for your agency and the functional area that describes the report topic. |
| **2** | **Title** field | Required | Type a report title for the report you are going to create. You must define a unique title for each new HR Writer Report. |

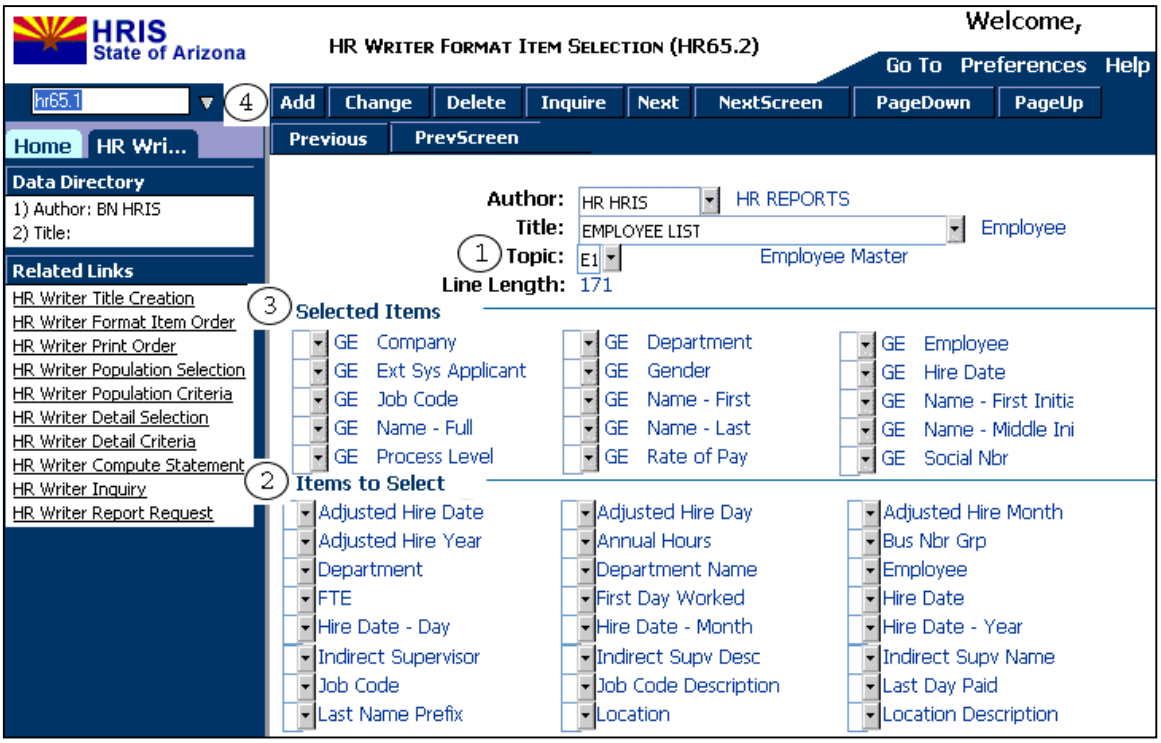
| | | | |
|---|---|---|---|
| | | | If you click the drop down arrow you will see all existing titles that have been created under the specified author.<br><br>**Tips**<br>• The title can be up to 30 characters. The name can include spaces.<br>• The more descriptive the title, the better all users will understand what the report contains.<br>  ○ **Example** - A title of "Lisa's Report" doesn't give the user any information about the report. A more descriptive title of "Payroll Dept List of New Hires" describes the intended report content.<br>  ○ **When naming a report, you should title the report so that another user will understand what is in the report.**<br>• Each Agency should consider establishing some naming conventions if they want to make their reports reusable. |
| **3** | **Type** field | Required | Select report Type from the drop down list. You must associate each HR Writer report with a single report type.<br><br>**Notes**<br>• The type field determines the data that is available when you build your HR Writer report. You must select a report type when you create an HR Writer Report. The available report types are:<br>  ○ (E) – Employee – this options yields results that include all current employee information including deductions, benefits, etc.<br>  ○ (H) – History – this option yields results from historical data such as payroll payments and benefits compensation history. The History option is used in more advanced HR Writer reports and is not covered in this training session.<br>  ○ (A) – Applicant – this option yields results from all current applicant information. Due to the states limited usage of applicant tracking, this option is not used. |
| **4** | **Detail Topic and Detail Line** | Optional | Fields will be discussed in more detail in HR Writer Advanced training. |
| **5** | **Frequency** | Required | Frequency is used to define when the reports will be |

| | | | |
|---|---|---|---|
| | field | | run. Select a Frequency from the drop down list.<br><br>**This field defaults to O (On Demand).**<br><br>**Notes**<br>• Other Frequency options are: W = Weekly, M = Monthly, Q = Quarterly, and A = Annually.<br><br>Frequency options other than "O" are used to define a frequency for routine processing of reports. Routine processing is typically defined by more advanced HR Writer users.<br><br>**Example** – Several reports under the same author are defined with a frequency of Monthly. That author could select parameters that would generate all Monthly reports by submitting only one HR Writer Job. |
| **6** | **Print File Name** | Optional | Type a unique name. This name appears in the print manager when you run HR170.<br><br>If you do not provide a Print File Name, HR Writer will create one for you. HR Writer will use the first word or the first 10 characters of the Title as the Print File Name. |
| **7** | **Distribution Group, Printer, Number of Copies and Save Report** | Optional | Fields are not used by the State of Arizona. Leave these fields blank. |
| **8** | **Spreadsheet Name** | Required if creating a CSV file. | Type a spreadsheet name. This field is required if you want to create a CSV file that contains the results of the report.<br><br>**Notes**<br>• See Appendix D – Creating a CSV File for additional information on creating a CSV file. |
| **9** | **Add** button | Required | Click **Add** to save and be automatically taken to the next form. |

**Complete Exercise 1 – Step 1 – In this exercise you will enter information into the HR65.1 to create your own Basic HR Writer Report.**

## *HR Writer Format Item Selection (HR65.2)*

**This will be the second form to complete.**
**This form is required to create an HR Writer Report.**




The HR Writer Format Item Selection form (HR65.2) contains different Topics that allow you to access information on the Employee Master Record (HR11.1).

Use this form to select the fields to display on your HR Writer Report. **At least one field must be selected to see any results.**

**Notes**

- Fields listed in the “Items to Select” section appear in alphabetical order. Use PageDown or PageUp to access additional data items.
- Select fields by typing an "X" ( ) in the Select field or click the drop down box.
  - To delete a field from your results (field displays in Selected Items), remove the “X” from the Select field.

| | | | |
|---|---|---|---|
| **1** | **Topic** field | Required | Select a Topic from the drop down list to display the various data items available.<br><br>• Click the Inquire button to view all the items within that topic. Items will appear in the ‘Items to select’ section of this form.<br><br>The type (see Page 8 for description of type) assigned on the HR Writer Title Creation Form |

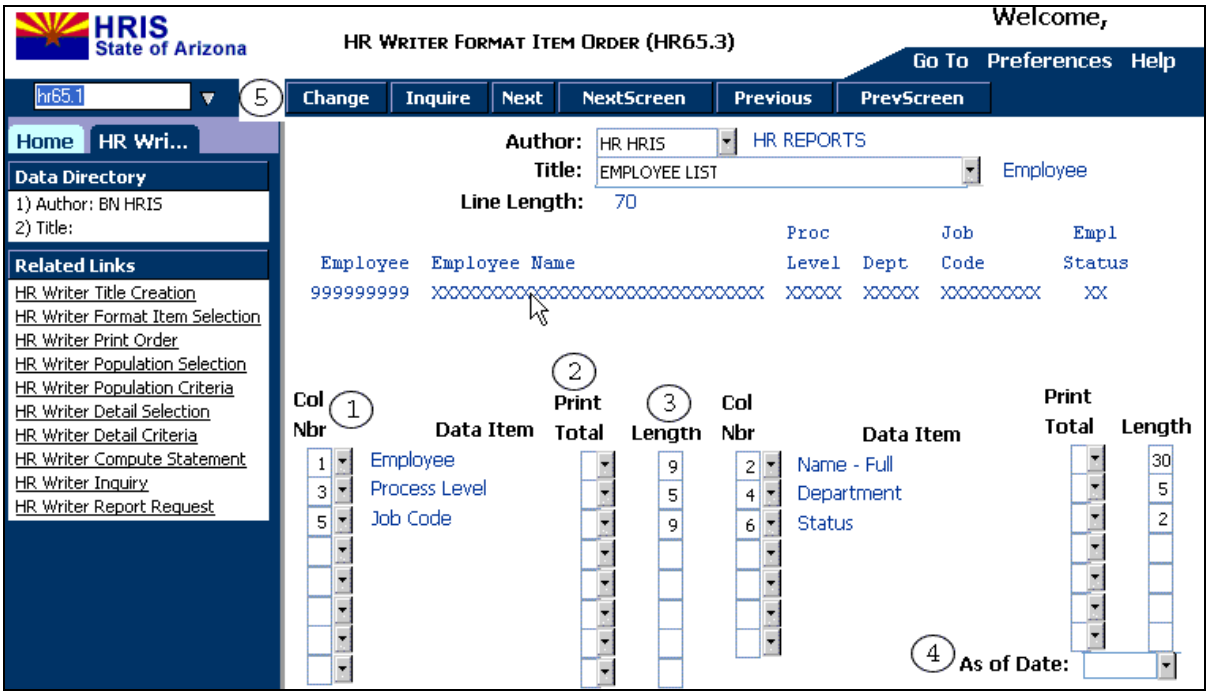
| | | | |
|---|---|---|---|
| | | | (HR65.1) determines which topics are available. The data items for the topic appear in the 'Items to Select' section of the form.<br><br>**Advanced Users**<br>• If you selected Summarized Line in the Detail Line field of HR65.1, only numeric non-date fields associated with the detail topic selected are available. This is because HRIS cannot summarize (total) an alpha or numeric date field.<br>• If you select Multiple Lines in the Detail Line field in HR65.1, you can select from all fields associated with the selected detail topic. |
| **2** | **Items to Select** | Required – must select fields to display | The Items to Select section displays all available data items for the Topic selected. Any of the fields that appear can be selected to appear in your report.<br><br>As data items are marked in the 'Items to Select' section, once the Add/Change button is clicked, those data items will move to the 'Selected Items' section of this form.<br><br>**Advanced Users**<br>• If the Detail Topic field was not used on the HR65.1 (see page8 for additional information), the available data items or fields will be associated with the Employee Master Record (HR11.1).<br>• If a detail topic was selected on HR65.1, the fields associated with the detail topic will be defined on the HR Writer Detail Selection (HR65.7). |
| **3** | **Selected Items** | Required – fields must be selected to be included in the report. | Displays the fields that have been selected to display on the report. (Field must show an "X" ( ) in the select box next to the title to be displayed).<br><br>**Notes**<br>• When the form is first opened (See graphic above), HRIS displays a number of fields with the label GE (General Information Topic). These data items or fields are prepopulated on new reports because they are the fields most commonly used in HR Writer Reports. To select a GE item, type 'X' in the select box and click **Change**.<br>  ○ Once Change is clicked those GE items not selected will disappear from the 'Selected |

| | | | |
|---|---|---|---|
| | | | Items' section of this form.<br><br>**The maximum number of data items that can be included in a report is 15.** |
| **4** | **Add/Change** Buttons | Required | Click **Add/Change** to save your changes.<br><br>**Notes**<br>• You should also click **Change** before performing a PageDown or PageUp, otherwise unsaved items marked with an "X" in the 'Items to Select' section will be lost.<br>• If changes are lost, you can always go back and recreate your selections.<br>• As you click **Change** on this form, the selected fields display in the top of the form. |

**Complete Exercise 1 – Step 2 – In this exercise you will select the items you want to display in your HR Writer Report.**

## *HR Writer Format Item Order (HR65.3)*

**This will be the third form in the HR Writer Process.**




**This form is optional.**
The HR Writer Format Item Order Form (HR65.3) is used to organize the appearance or layout for your report results across the page.

### Notes

- The data items selected on the HR Writer Format Item Selection Form (HR65.2) display on the lower half of the screen with column numbers automatically assigned.
  - The column numbers default to the order you selected the items in on the HR65.2.
  - Use this form to reorder the columns or change the length of the column on your report results.
- As you make changes and save those changes, the display on the HR65.3 will be automatically updated with the new column order/field lengths. The display will not change until you click **Change**.

| | | | |
|---|---|---|---|
| **1** | **Col Nbr** field | Required | Type a sequential number in the Column Nbr field that represents the order you want the data items to appear in the report results.<br><br>**Example** – Entering a 1 in the Col Nbr field next to Company indicates that this field will appear as the first column (from the left) on the report results. A 2 in the Employee field will place that information in the second column from the left, and so on. |

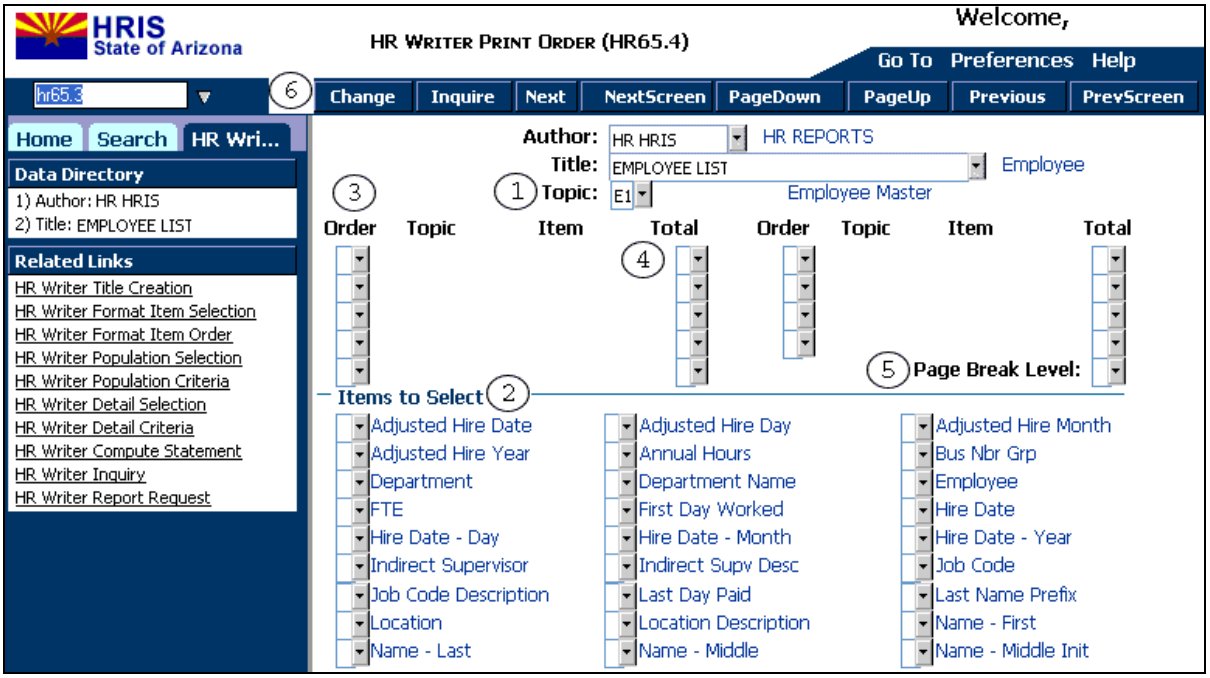
| | | | |
|---|---|---|---|
| | | | You can rearrange any of the fields displayed by changing their column number.<br><br>**Notes**<br>• Data items **cannot** have the same Column Nbr. If they do, you will receive an error message when you click **Change**.<br>• If you click the Col Nbr field drop down arrow, the box contains the option "01:15". To continue HRIS needs you to type a number between 1 and 15 in the Col Nbr field. |
| **2** | **Print Total** field | Optional | You can total any numeric, non-date item on the report. If you want HRIS to total the data item, you must select an option in the Print Total field.<br><br>**Notes**<br>• Options are:<br>  ○ (Y) – Yes. Total the column<br>  ○ (C) – Count. Count the data items and include the count in the report. This is only valid if the data item is Employee or Applicant.<br>  ○ (R) – Repeat. Suppresses the data detail. |
| **3** | **Length** field | Required | Type in the desired size of the data item results using the Length field.<br><br>**Notes**<br>• HRIS defaults a minimum column length in each data item. If a 0 is entered or the field is left blank, HRIS will default to the minimum size for the data item. Any attempt to reduce the data item length too less than the minimum result in the minimum length defaulting.<br>• HR Writer Report Request (HR170) produces a report that allows up to 190 characters per line; however, standard printers only support 132 characters per line.<br><br>You will not see the changes in field lengths until you click the **Change** button. Once clicked, the display of the headings and the line length of the affected fields change. |
| **4** | **As of Date** field | Optional | Type a date in this field to recreate the Employee record (salary, department, and so on) as it was on that date.<br><br>If the hire date of an employee is after the “as of” date, the employee would not appear in the report |

| | | | |
|---|---|---|---|
| | | | results because he was not an Employee on the “as of” date.<br><br>**Notes**<br>• For this feature to work, the affected fields must be logged or entered through an Individual Action (XP52.1). |
| **5** | **Change** Button | Required | Click **Change** to save changes. |

**Complete Exercise 1 – Step 3 – In this exercise you will define how your data items will display in your report.**

## *HR Writer Format Item Order (HR65.4)*

**This will be the fourth form in the HR Writer Process.**
**This form is optional.**




The HR Writer Format Print Order Form (HR65.4) is used to sort the final report results (changing how the report will display down the page). The Print Order form functions the same way a sort feature works.

| | | | |
|---|---|---|---|
| **1** | **Topic** field | Required | Select a topic from the drop down list to display the various data items available for sorting and totaling.<br><br>**Notes**<br>• Topics are limited to master topics and the detail topic specified on HR65.1 (see page 8 for additional information). Master topics include information from the Employee Master Record (HR11.1) and the Applicant Form (PA31.1).<br>• The options selected on HR65.4 may differ from the items selected on the HR Writer Format Item Select (HR65.2).<br>  ○ **Example** – On the HR65.2, you may select to display the Employee Number and Name. On the HR65.4 you might select your sort to be done by Process Level. The Process Level field does not have to be selected to display on |

| | | | |
|---|---|---|---|
| | | | HR65.2 to be used to sort your report results on HR65.4 |
| **2** | **Items to Select** | Required – must select fields to display | Select the data items to use in the report results.<br><br>• To add an item, enter "X" ( ) in the select box or click the drop down arrow, then "Select" from the drop down box and click **Change**.<br><br>**The maximum number of data items that can be included in the sorting for a report is 9.** |
| **3** | **Order** field | Required | Change the sort order by changing the column numbers next to each data item. You can reorder the fields in any way by typing sequential numbers in the Order field.<br><br>**Example** – If you want to sort the results by Employees' Last Name, then Employee Number and Process Level,<br>1. Place an "X" next to these three fields in the 'Items to Select' area,<br>2. Click Change,<br>3. Type 01 next to Last Name, 02 next to Employee Number and 03 next to Process Level, then<br>4. Click Change.<br><br>**Notes**<br>• Data items **cannot** have the same Column Nbr. If they do, you will receive an error message when you click **Change**.<br>• If you click the Col Nbr field drop down arrow, the box contains the option "01:9". To continue, HRIS needs you to enter a number between 1 and 9 in the field.<br>• The system defaults to an Employee Number sort if nothing is entered on this form. |
| **4** | **Total** field | Optional | If data items where selected on HR Writer Format Item Order (HR65.3) to total, use this field to select the total option.<br><br>The total option you select determines<br>• The kind of total information printed, and<br>• Whether or not the report prints detail and totals, or only totals.<br><br>**If no option is selected, totals do not print on the report.** |

| | | | |
|---|---|---|---|
| | | | **Notes**<br>• Selection options are:<br>  ○ (Y) – Print column Totals – print detail with the columns.<br>  ○ (S) – Totals Only Suppress Detail and (Z) – Averages Only Suppress Detail - used for suppressing data detail. These will be covered in more detail in Appendix A – HR Writer Tips (Page 31).<br>  ○ (A) – Print Column Averages – print the report in detail with column averages.<br>  ○ (R) – Record Count Only – print only a record count of Employees and Applicants included in the sort level.<br>• You can select a different total option for each data item being totaled. The report then prints the item name and field value associated with the print order whenever the value changes. |
| **5** | **Page Break Level** field | Optional | To define a page break; select the column number in the Order field where you want the report to begin a new page. |
| **6** | **Change** Button | Required | Click **Change** to save changes.<br><br>**Notes**<br>• You should always click **Change** before performing a PageDown or PageUp, otherwise unsaved items marked with an 'X' in 'Items to Select' will be lost.<br>• If changes are lost, you can always go back and recreate your selections.<br>• As you click **Change,** the selected fields in 'Items to Select' move to the top of the form. |

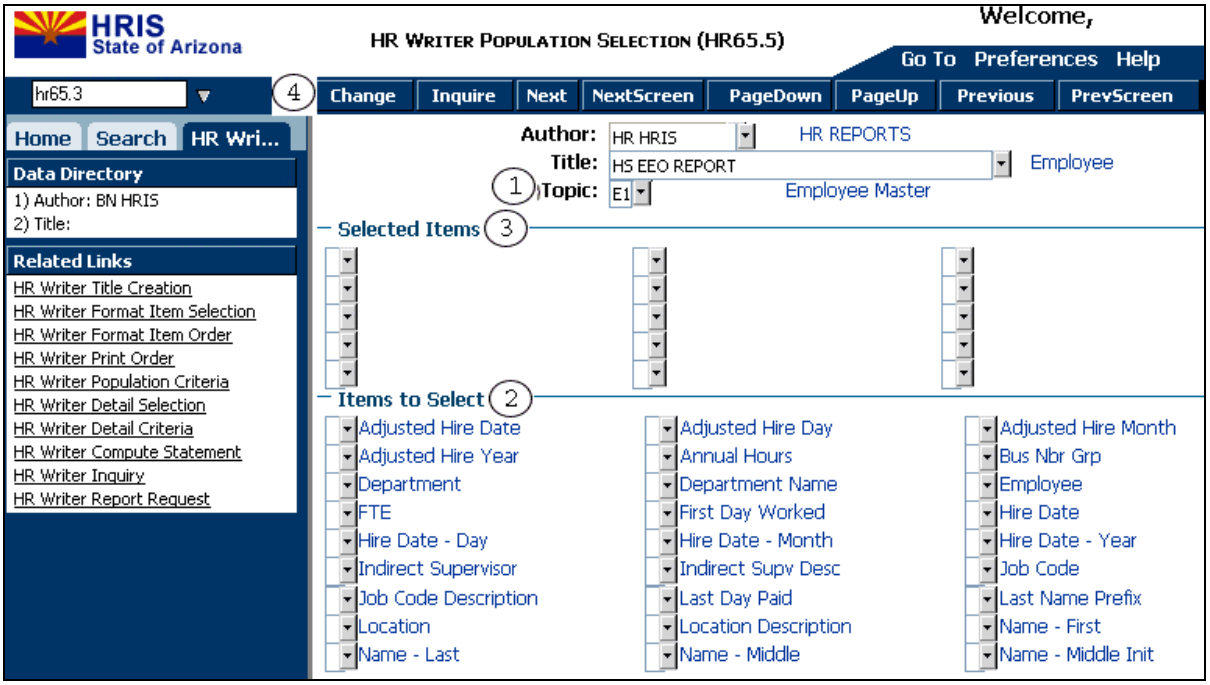
**Complete Exercise 1 – Step 4 – In this exercise you will define the sort for your report results.**

## *HR Writer Population Selection (HR65.5)*

**This will be the fifth form in the HR Writer Process.**
**This form is optional.**

The HR Writer Population Selection Form (HR65.5) is different from the previous forms because it requires using two forms in conjunction to define the population you want to see in your report results. Both forms are optional in creating an HR Writer Report, but they provide the ability to define your results with better clarity.

First, use the HR65.5 to select the data items you want to specify criteria on. Then the HR Writer Population Criteria Form (HR65.6) will be used to define the criteria (rules) for the population. Employees satisfying the criteria will be included in the report results.




| | | | |
|---|---|---|---|
| **1** | **Topic** field | Required | Select a topic from the drop down list.<br>• Click the **Inquire** button to view all the items within that topic. Items will appear in the 'Items to select' section of this form.<br><br>**Notes**<br>• The type (see Page 8 for description of type) assigned on the HR Writer Title Creation Form (HR65.1) determines available topics.<br><br>**Example** – Create a report that shows EEO information for the dates between 01/01/2004 and 03/31/2004.<br>• On the HR65.5, you would select 'Hire Date' from 'Items to Select'. |

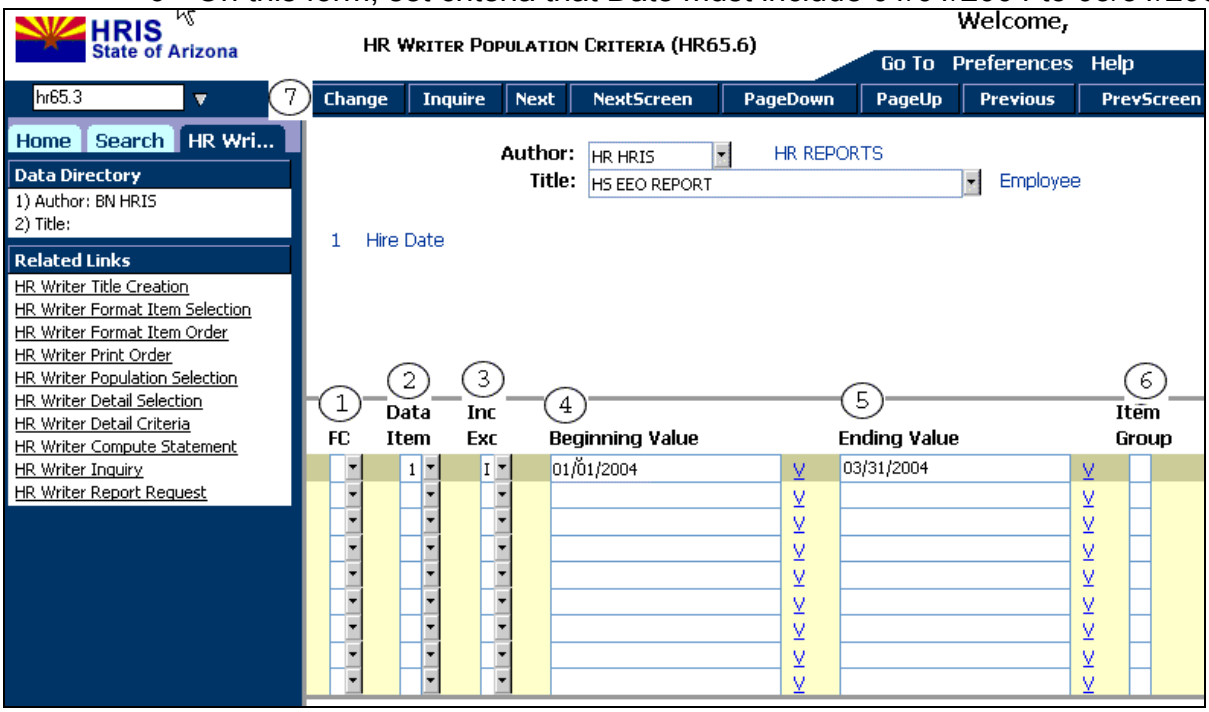
| | | | |
|---|---|---|---|
| | | | • On the HR Writer Population Criteria (HR65.6) (Page 21) you would add a Beginning Value of 01/01/2004 and an ending value of 03/31/2004. |
| **2** | **Items to Select** | Required – must select fields to display | Select the data items to use in the population criteria definition.<br><br>**Notes**<br>• To add an item, enter "X" ( ) in the select box or click the drop down arrow, then "Select" from the drop down menu and click **Change**.<br>• Any of the fields that appear can be selected to use as criteria in your report.<br>• As data items are marked in the 'Items to Select' section, and the Add/Change button is clicked, those data items will move to the 'Selected Items' section of this form. |
| **3** | **Selected Items** | Required – fields must be selected to define criteria. | Includes the fields that have been selected to use when defining the population criteria. (Field must show an "X" ( ) in the select box to be selected).<br><br>**Note**<br>• To delete an item, remove the 'X' from the select box and click **Change**.<br><br>**The maximum number of data items that can be included in the population criteria definition for a report is 9.** |
| **4** | **Change** Button | Required | Click **Change** to save changes.<br><br>Notes<br>• You should always click **Change** before performing a PageDown or PageUp, otherwise unsaved items marked with an 'X' in 'Items to Select' will be lost.<br>• If changes are lost, you can always go back and recreate your selections.<br>• As you click **Change,** the selected fields in 'Items to Select' move to the 'Selected Items' section of the form. |

**Complete Exercise 1 – Step 5 – In this exercise you will select the data items you will use to define population criteria.**

## *HR Writer Population Criteria (HR65.6)*

**This will be the sixth form in the HR Writer Process.**
**This form is optional and will only be used if data items were selected on the HR65.5 (See Page 19 for information). Use this form to assign criteria (valid values) to the data items selected.**

- **Example –** Create a report, which displays EEO information from Jan 1 – March 31 of 2004.
  - On the HR65.5 – select the Hire Date.
  - On this form, set criteria that Date must include 01/01/2004 to 03/31/2004.




### Notes

- Items selected on the HR Writer Population Selection (HR65.5) appear on the top half of the form and automatically have a value assigned to them by HR Writer. This is the value to input in the Data Item fields.

| | | | |
|---|---|---|---|
| **1** | **FC** field | Required | Select whether you want to A – Add, C – Change or D – Delete a population criteria. |
| **2** | **Data Item** field | Required | Type the application-assigned number of the data item appearing in the top portion of this form, you want to define criteria for. |
| **3** | **Inc Exc** field | Required | Select whether the individuals meeting the selection criteria are (I) – included or (E) – excluded.<br><br>**Example** – To specify a date criteria that you would like to include in your report, you would enter the following (from example above):<br>• FC = A |

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| | | | • Data Item = 1<br>• Inc/Exc = I (to include)<br>• Beginning Value = 01/01/2004, Ending Value = 03/31/2004 |
| **4** | **Beginning Value** field | Required | Define the beginning value (if applicable) that you want the data item criteria to include/exclude.<br><br>**Example** – To include all Employees in a specific status, you may type a beginning value of A0.<br><br>**Tip** – You can use a wild card (*) to select the records for the data item on alpha fields (not date or numeric). When using the wild card, leave the ending value field blank. Wild card is setup as follows 'AN*', this would return all the values that begin with AN. |
| **5** | **Ending Value** field | Optional | Define the ending value (if applicable) that you want the data item criteria to include/exclude.<br><br>**Example** – To include all Employees in a range of status codes, you may type a beginning value of A0 and an ending value of A9. |
| **6** | **Item Group** field | Optional | This field functions as an "And/Or" feature to allow you to defined multiple different criteria groups the Employee must meet.<br><br>To group the criteria, you will place an alpha or numeric character in the Item Group field, this character associates that criteria with others in the item group.<br><br>• An "and" condition requires that an Employee meet the selection criteria of each and every consecutive data item with the same character.<br>  ○ **Example** - if you want to include all Employees with A0 status hired between 01/01/1984 and 02/01/1984, you would select Status and Hire Date on the HR65.5. Then on the HR65.6, you would define<br>  ▪ Status (Data Item 1), Inc/Exc = I, Beginning Value = A0 and Item Group = A<br>  ▪ Hire Date (Data Item 2), Inc/Exc = I, Beginning Value = 01/01/1984, Ending Value = 02/01/1984 and Item Group = A<br>• An "or" condition requires that an Employee meet at least one criteria in the different data |

| | | | |
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| | | | item groups to be included. You can use an "or" condition to include or exclude data items with different item group characters.<br>○ **Example** - if you want to include all Employees with A0 status hired between 01/01/1984 and 02/01/1984 that work in Dept A or Dept B, you would select Status, Hire Date and Department on the HR65.5. Then on the HR65.6, you would define<br>▪ Criteria 1:<br>• Status (Data Item 1), Inc/Exc = I, Beginning Value = A0 and Item Group = A<br>• Hire Date (Data Item 2), Inc/Exc = I, Beginning Value = 01/01/1984, Ending Value = 02/01/1984 and Item Group = A<br>• Department (Data Item 3), Inc/Exc = I, Beginning Value = Dept A and Item Group = A<br>▪ Criteria 2<br>• Status (Data Item 1), Inc/Exc = I, Beginning Value = A0 and Item Group = B<br>• Hire Date (Data Item 2), Inc/Exc = I, Beginning Value = 01/01/1984, Ending Value = 02/01/1984 and Item Group = B<br>• Department (Data Item 3), Inc/Exc = I, Beginning Value = Dept B and Item Group = B<br>• All data items with "blank" in the Item Group are considered one item group following the "And' Condition. |
| **7** | **Change** Button | Required | Click **Change** to save changes.<br><br>Notes<br>• You should always click **Change** before performing a PageDown or PageUp, otherwise unsaved items will be lost.<br>• If changes are lost, you can always go back and recreate your criteria.<br>• As you click **Change,** the option defined in the 'FC' column disappears. |

**Complete Exercise 1 – Step 6 – In this exercise you will define your population criteria.**

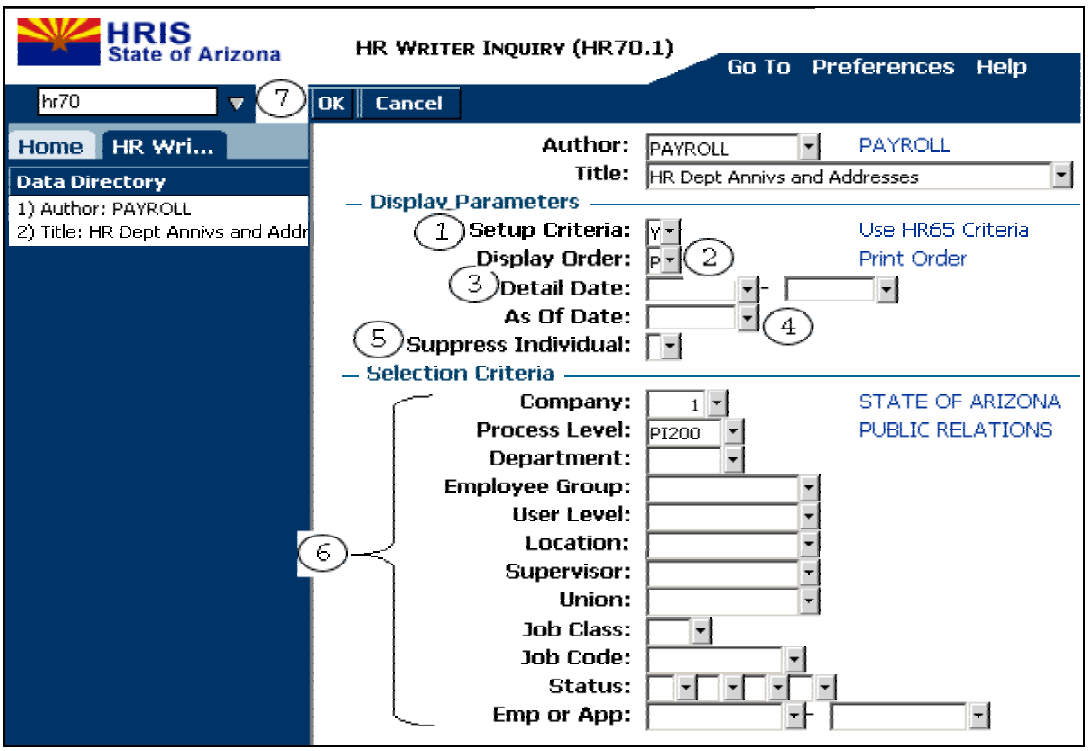
**Note**

- **The Population Criteria is the last step in creating a basic ad hoc report. Use HR Writer Report (HR170) to run the report, or preview the results using HR Writer Inquiry Form (HR70.1.)**

## *HR Writer Report Results (HR70.1 and HR170.1)*

**The HR Writer Inquiry Form (HR70.1) provides the ability to preview the results of the report online, while the HR Writer Report Request Form (HR170) shows the complete results, and provides the option to print the report.**

### HR Writer Inquiry Form (HR70.1)




The HR Writer Inquiry Form allows you to run a preview of the report results used before creating the report and sending it to a printer. Use this form to check that the report sorts correctly and lists the appropriate Employees.

Be aware that this view has no formatting and is not how the final report will display.

**Notes**

- Company is a required field and must be included in order for the report to work. Company will always be Company '1' unless you are from ADOA Central Benefits.
- If the results show more employees than expected, check that the HR Writer Population Selection (HR65.5) (Page 19) and HR Writer Population Criteria (HR65.6) (Page 21) forms are defined correctly.
    - Watch the include/exclude statement values.
    - Watch for Employee status codes, i.e., leaving status criteria blank will return ALL Employees, including terminated staff.
- The HR Writer Inquiry (HR70.1) form can be used to define additional parameters. You can select criteria on this form to narrow down the results displayed in your report. Additional options include: Process Level, etc.

| | | | |
|---|---|---|---|
| **1** | **Setup Criteria** field | Required | Select the setup criteria that should be used when the query is run.<br><br>Notes<br>• Selection options are:<br>  ○ Y – Yes, report should use both the HR65.5 and HR65.7 selection criteria.<br>  ○ N – No, report should use not use the criteria defined on HR65.5 of HR65.7<br>  ○ P – use only the population selection defined on HR65.5<br>  ○ D – use only the detail population selection defined on HR65.7<br><br>**Default is Y, and this option will be used in most cases. More advanced users may select P or D.** |
| **2** | **Display Order** field | Required | Select the order you want the results to display.<br><br>Notes<br>• Options are<br>  ○ (P) – Print Order (as defined on HR65.4),<br>  ○ (N) – Numeric and<br>  ○ (A) – Alpha.<br><br>**Default is P.** |
| **3** | **Detail Date** field | Optional | Type in a beginning and ending date range to make a search for historical information more efficient.<br><br>This feature makes your inquiry more efficient by limiting the scope of the inquiry to a specific time period rather than all historical records.<br><br>A date range **should be used** if the report type was setup as History on the HR65.1.<br><br>**Advanced Topics**– You should always indicate a detail date range in this form or in the HR65.8 (HR Writer Detail Criteria) for Employee history topics. Any date range entered on this form overrides criteria defined on the HR65.8. (See Advanced HR Writer Training.) |
| **4** | **As of Date** field | Optional | Type a date to perform your query "as of" that date.<br>Notes<br>• When an "as of" date is provided, HRIS recreates the Employee record as it was on the specified date.<br>• If an Employee is hired after the date, he/she will not appear on the inquiry. |

| | | | |
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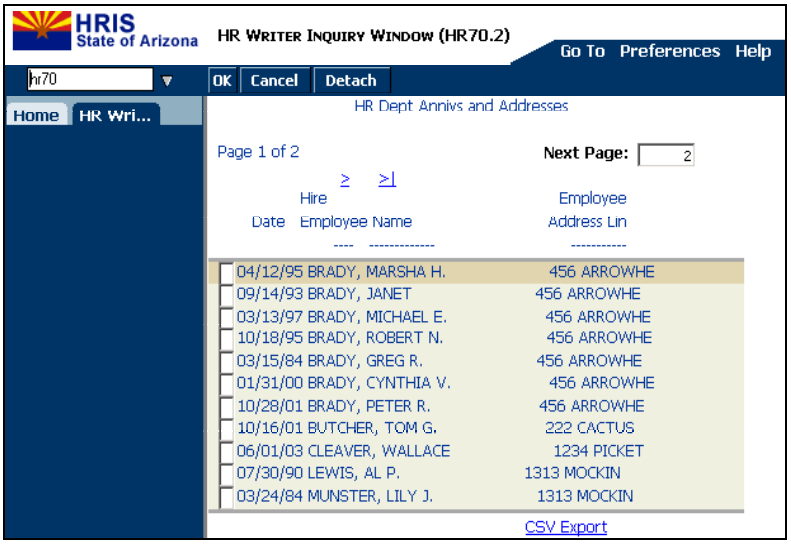
| | | | • In order for this feature to work, the affected fields must be logged or entered through personnel actions (XP52.1). |
| **5** | **Suppress Individual** field | Optional | Select whether or not HR Writer should suppress printing information for individuals for which no qualified detail information is found.<br><br>**Advanced Topics** – The value entered in this field overrides the value selected in the Suppress Individual field on the HR Writer Detail Criteria Form (HR65.8). (See Advanced HR Writer Training.) |
| **6** | **Company – Emp or App** fields | Company field – Required<br><br>All other fields – Optional | You can select additional criteria on this form to narrow down the results displayed in your report. Additional options include: Process Level, Department, Employee Group, etc. |
| **7** | **OK** button | Required | Click Ok to be taken to the HR Writer Inquiry Window (HR70.2), which displays results. |

**HR Writer Inquiry Form Results**
Below you will see the results of a report that was created to show Employee Anniversaries along with home address:



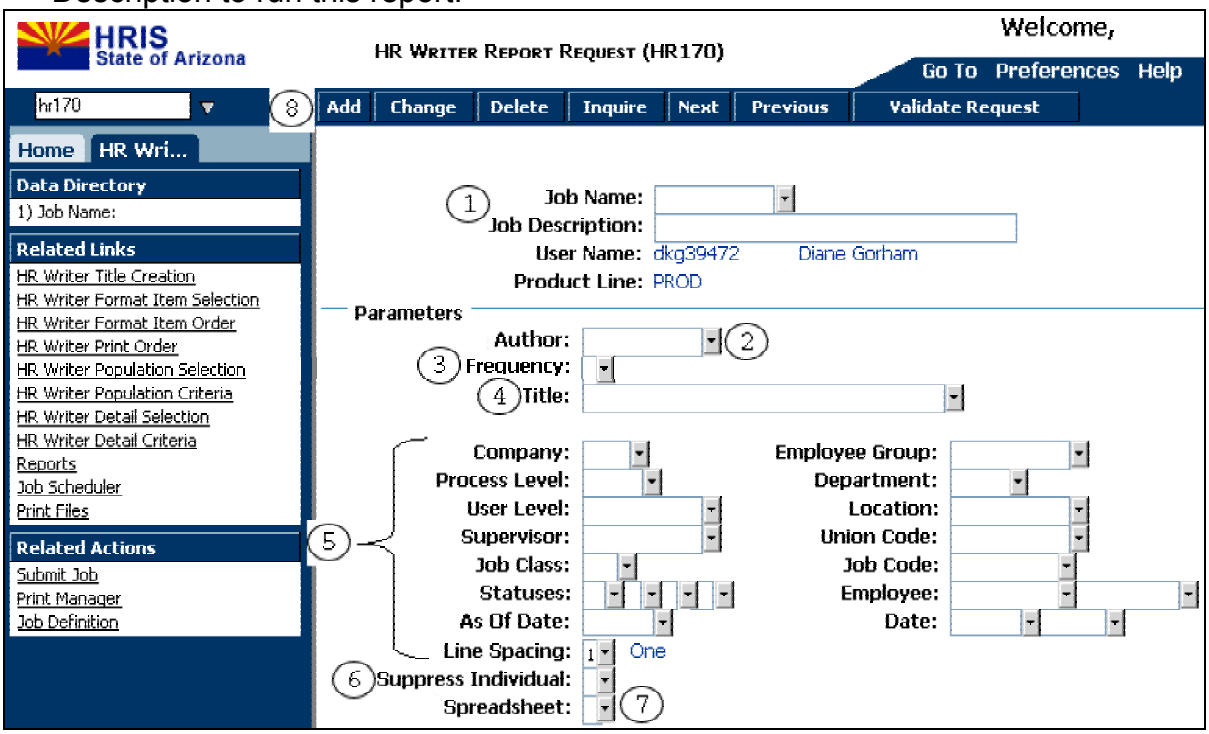

**Complete Exercise 1 – Step 7 – In this exercise you will run an HR Writer Inquiry and display the results of the report you built.**

**HR Writer Report Request (HR170.1)**

**Form can be used to create a report on the screen, send the report to an attached printer, or export the results into a CSV file.**

**Notes**

- If the results show more employees than expected, check that the Population Selection (HR65.5) and Population Criteria (HR65.6) forms.
    - Watch the include/exclude statement values.
    - Watch for Employee status codes, i.e., leaving status criteria blank will return ALL Employees, including terminated staff
- You can select additional criteria on this form to narrow down the results displayed in your report. Additional options include: Process Level, Department, Employee Group, etc.
- As with all HRIS Standard Reports, you must provide a unique Job Name and Description to run this report.




| | | |
|---|---|---|
| **1** | **Job Name/Job Description** fields | Define a unique name and description for the HR Writer report you will be running. |
| **2** | **Author** field | Select the Author of the Report you would like to generate. |
| **3** | **Frequency** field | Select the frequency for the report(s) you want to run.<br><br>If you want to run all the reports for that author assigned to a specific frequency on the HR65.1, you must select that frequency here. HRIS will then generate only the reports assigned with the specified frequency.<br><br>If this field is left blank, HRIS creates all the reports for the author regardless of frequency.<br><br>Notes<br>• Frequency options are W = Weekly, M = Monthly, Q = Quarterly, A = Annually and O = On Demand. |
| **4** | **Title** field | Select the Title you defined for your report. |

| | | |
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| | | If you leave the Title field blank, HRIS generates all reports defined for the selected author.<br><br>To select your report you can either type in the name of the report or select it from the drop down list. If you type in the name it must match the title entered on HR65.1 exactly or you will receive an error. |
| **5** | **Company – Line Spacing** | You can select additional criteria on this form to narrow down the results displayed in your report. Additional options include: Process Level, Department, Employee Group, etc. |
| **6** | **Suppress Individual** | Select whether or not HR Writer should suppress printing information for individuals for which no qualified detail information is found.<br><br>**Advanced Topics** – The value entered in this field overrides the value selected in the Suppress Individual field on the HR Writer Detail Criteria Form (HR65.8). (See Appendix C – HR Writer Title Update Form (XH64.1)) |
| **7** | **Spreadsheet** field | Select YES if you want to create a CSV field when you submit the report.<br><br>**Note** – if you entered a value in the Spreadsheet field on HR65.1, the CSV field will be available in the Print Manager with that file name. If no value was entered, the spreadsheet will be under the name SPREAD2.<br><br>**See** Appendix D – Creating a CSV File |
| **8** | **Add/Change** Button | If you are creating a new report, and this is the first time you have defined parameters, click Add.<br><br>If you are changing a previous report, and you have already added the report, then click Change. |

**For instructions on how to submit and results, see Appendix E – Submit and Access Results of a Report Job (Page 43)**

**Complete Exercise 2, 3, and 4 – In these exercises you will build and run your own HR Writer Reports.**

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# Appendix A – HR Writer Tips

- Check the standard (canned) reports first. There may be one that can be used and save time. Don't forget that a standard report may exist in another module (HR, Payroll, Benefits, Personnel Administration, Time Accrual, Time and Attendance.)
- Start by completing only the two required forms (HR Writer Title Creation (HR65.1) (Page 7) and HR Writer Format Item Selection (HR65.2) (Page 10)) and build from there.
- Build the report in pieces, testing and saving along the way. (It is easier to diagnose a problem if you can determine the point at which things go wrong and make corrections to the report.)
- When asked to create a report find out what data the requestor wants to see (Format Items), how they want to see it (Format Order), what page breaks they want (Print Order) and who they want to include (Selection). This will help complete the HRIS forms accurately. See Appendix B – Thing to Consider when Building an HR Writer Report (Page 33) for things to consider when developing an HR Writer Report.
- It is not necessary to complete all fields on all forms.
- To sort the report a certain way it is not required to list that field in the HR Writer Format Item Order (HR65.3). However, listing it allows the field to display as a visual confirmation or double check that the sort is working correctly. (List it on the far right of the results page.)
    - **Example** – a birthday list was requested, they requestor asked that the list be sorted by department name. Display Employee name and birthday in the first few fields then department as the last.
- Equate the term **POPULATION** to the words **WHICH EMPLOYEES** HR Writer Population Selection (HR65.5) defines the population variables and HR Writer Population Criteria (HR65.6) defines the matching criteria for those variables.
- Item Counting and Totaling Functions
    - When using counting or totaling functions in HR Writer, how these are setup on the HR Writer Format Item Order (HR65.3) and the HR Writer Format Item Order (HR65.4) determines how HR Writer will perform the count or total.
    - To count the number of employees or applicants included in a report, the Employee or Applicant field must be included as a data item.
        - Select C in the Print Total field on HR65.3 for the data item.
        - In the total field on HR65.4, select Y for each sort level for which you want to see counts. Select R for each sort level to get just a count of records with no detail.
    - To total a **numeric value** column in the report, select Y in the Print Total field on HR65.3 for the appropriate numeric item. In the Total field on HR65.4 for sort level(s), you have the following options:
        - Y – for column totals,

- A – for averages,
- R – for a count of the number of records associated with a data item with details suppressed,
- S – for column totals with details suppressed, and
- Z – for averages with detail suppressed.

- To summarize historical records (If Type on HR65.1 is selected as History), select R in the Print Totals field on HR65.3 for all data items beside the one to be summarized. Select Y in the total field on HR65.4.
- The following is a table illustrating the possible combinations between the HR Writer Format Item Order (HR65.3) and the HR Writer Print Order Form (HR65.4) with the subsequent results:

| HR65.3 – Print Total Field | HR65.4 – Total field | Result |
|---|---|---|
| N | N | No Totals |
| Y | Y | Totals by Sort Level |
| Y | A | Averages of numeric values by sort level |
| Y | R | Count the number of records associated with an item based on sort level, detail suppressed. |
| Y | S | Totals only by sort level, details suppressed. |
| Y | Z | Averages only by sort level, details suppressed. |
| C | Y | Total of Count (Employee's and Applicants only). |
| R | S | Total per detail line with the item marked "R" repeated. |

## Appendix B – Thing to Consider when Building an HR Writer Report

When requested to create a report ask questions to find out:

- What data the requestor wants to see (This is your Format Item Selection)
- How they want to see it (This is your Format Item Order)
- What page breaks they want (This is your Print Order)
- Who they want to include (This is your Population Selection and Population Criteria)

| | | |
|---|---|---|
| HR65.2 | HR Writer Format Item Selection | WHAT fields should be displayed in the results?<br>Choose fields from a pick list, in no particular order. Use HR65.3 to arrange them in the requested order.<br>Caution – should PageDown or PageUp be needed to get to more field selections, click Change before leaving that page or the selected items will be lost. |
| HR65.3 | HR Writer Format Item Order | How will the fields display across the page?<br>The fields selected in HR65.2 can be reordered here. |
| HR65.4 | HR Writer Print Order | HOW should the results be listed down the page?<br>This is the same as a sort order.<br>Fields selected here do not have to be listed in prior forms (HR65.2 or HR65.3.) |
| HR65.5 | HR Writer Population Selection | WHO should be seen in the results?<br>Select the field names here then use HR65.6 to add the values.<br>Fields selected here do not have to be listed in prior forms (HR65.2 - HR65.4.) |
| HR65.6 | HR Writer Population Criteria | WHO should be seen in the results?<br>Define the criteria here for the data items selected on HR65.5. Criteria can only be defined on this form for data items selected on HR65.5.<br>If no fields are listed, go back to the prior form (HR65.5) and select them. Click Change to save. |

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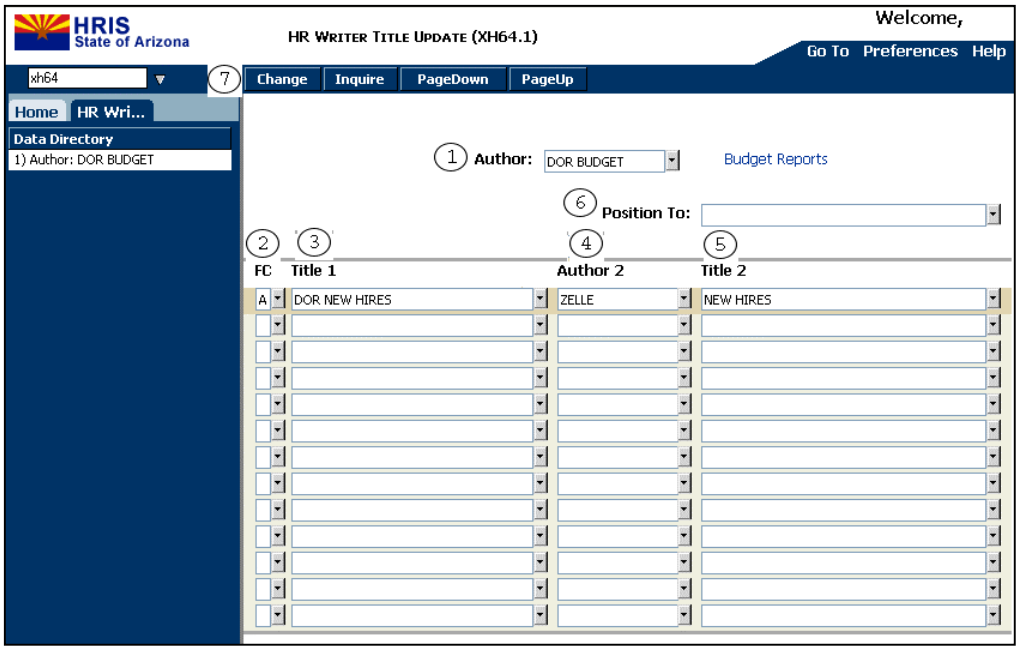
# Appendix C – HR Writer Title Update Form (XH64.1)

In the event that a report needs to be renamed or copied, use HR Writer Title Update (XH64.1.)

Select an Author from the drop down box and Inquire. **It is critical to click Inquire in order to see the list of reports.**

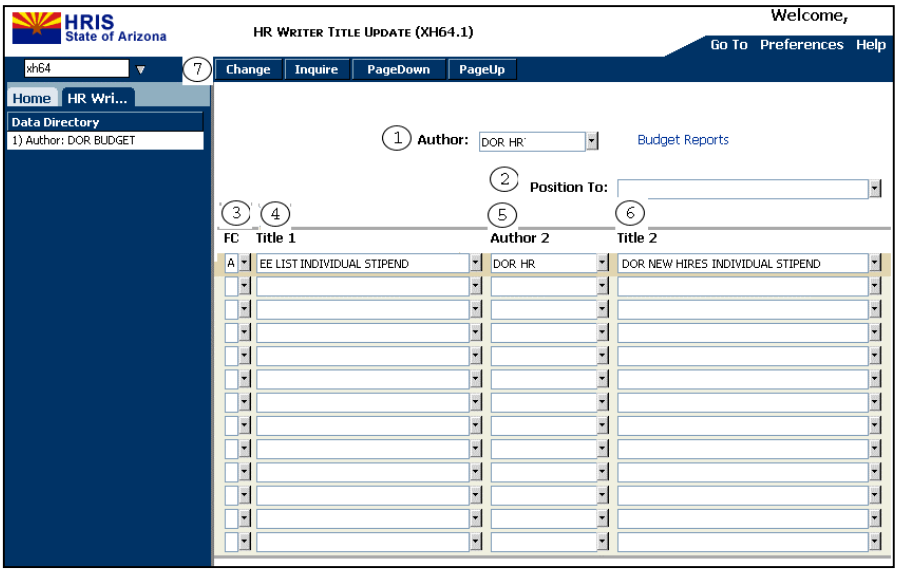
## *Steps to copy a report from another author to your author*




| | | | |
|---|---|---|---|
| **1** | **Author Field** | Required | Select **Your** Current Author |
| **2** | **FC field** | Required | Select the Add function code when copying reports across authors.<br><br>FC = 'A' |
| **3** | **Title 1 field** | Required | Type the new title for your report.<br><br>The title should be what you want to call the report.<br><br>**Example** – We are creating the report 'DOR NEW HIRES' |
| **4** | **Author 2 field** | Required | Select Author to copy from.<br><br>**Example** – Report is being copied from Author 'Zelle' |
| **5** | **Title 2 field** | Required | Select report title to copy from Author 2 field<br><br>**Example –** Report being copied is |

| | | | |
|---|---|---|---|
| | | | called 'NEW HIRES'. |
| **6** | **Position To field** | Optional | Field is used when changing Report names. See description under Steps to rename a report within your current author.<br><br>Do not use the Position to field when copying across authors. |
| **7** | **Change button** | Required | Click Change to process your action. |

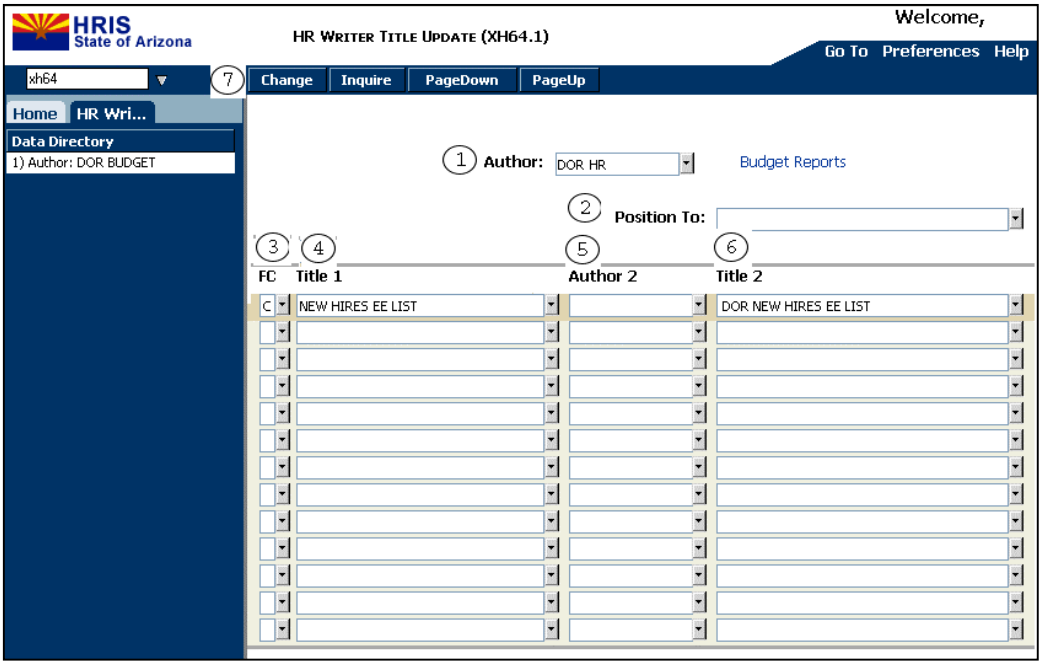
## *Steps to copy a report within the same author*




| | | | |
|---|---|---|---|
| **1** | **Author Field** | Required | Select Your Current Author |
| **2** | **Position To field** | Optional | Feature acts as a 'Page Down' function.<br><br>You can use this feature to advance to a specific report.<br><br>Select the report title from the drop down list, and click the Inquire button. The selected report will show as the first report in the list. |
| **3** | **FC field** | Required | Select the Add function code when copying reports within the same author.<br><br>FC = 'A' |
| **4** | **Title 1 field** | Required | Type the new title for your report.<br><br>The title should be what you want to call the report.<br><br>**Example** – We want to create a new report called 'EE LIST INDIVIDUAL STIPEND'. This report will be a copy of the old report 'DOR NEW HIRES INDIVIDUAL STIPEND' |
| **5** | **Author 2** | Required | Select Your Current author. |

| | | | |
|---|---|---|---|
| | **field** | | When copying you must select an Author.<br><br>**Example –** We would select author DOR HR. |
| **6** | **Title 2 field** | Required | Select report title to copy from Author 2 field.<br><br>Example – We selected report 'DOR NEW HIRES INDIVIDUAL STIPEND' to copy from Author 'DOR HR |
| **7** | **Change button** | Required | Click Change to process your action. |

## *Steps to rename a report within your current author*




| | | | |
|---|---|---|---|
| **1** | **Author Field** | Required | Select **Your** Current Author |
| **2** | **Position To field** | Optional | Feature acts as a 'Page Down' function.<br><br>You can use this feature to advance to a specific report.<br><br>Select the report title from the drop down list, and click the Inquire button. The selected report will show as the first report in the list. |
| **3** | **FC field** | Required | Select the Change function code when renaming reports within an author.<br><br>FC = 'C' |
| **4** | **Title 1 field** | Required | Select the report title you want to |

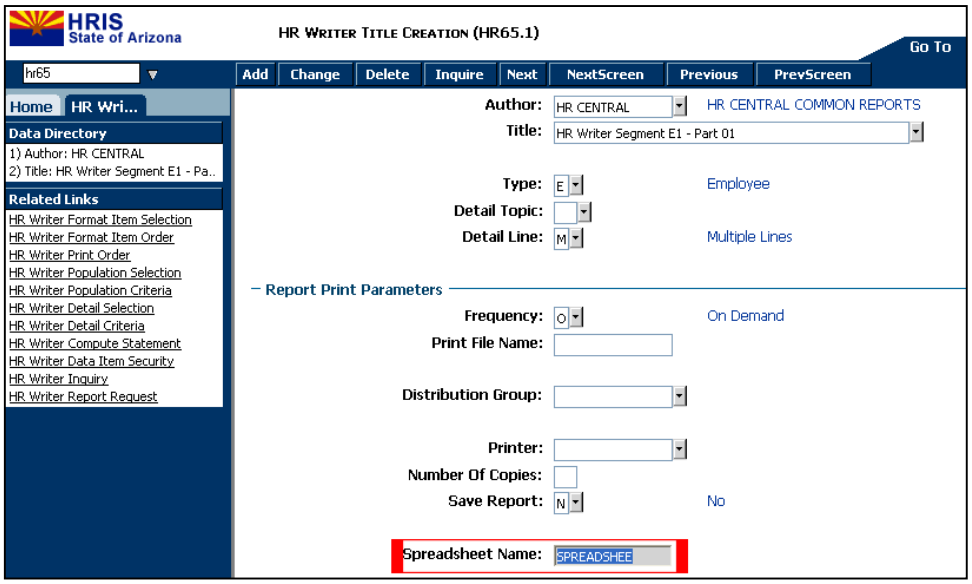
| | | | |
|---|---|---|---|
| | | | rename.<br><br>**Example –** Rename report title 'NEW HIRES EE LIST' to 'DOR NEW HIRES EE LIST' |
| **5** | **Author 2 field** | Do Not Use | Field will be left blank. |
| **6** | **Title 2 field** | Required | Type the new title for your report.<br><br>**Example –** New report title is 'DOR NEW HIRES EE LIST' |
| **7** | **Change button** | Required | Click Change to process your action. |

# Appendix D – Creating a CSV File

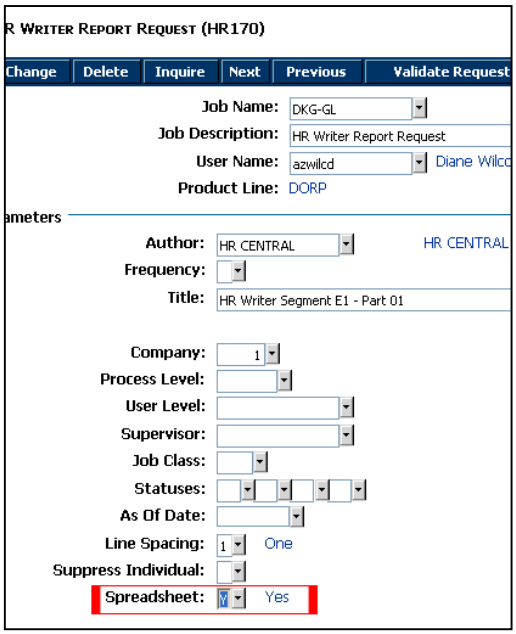
HR Writer provides the ability to generate CSV (Comma-separated value) files with the results of you developed HR Writer reports. These CSV files can then be opened in applications like MS Excel, etc for manipulation.

To create a CSV file from an HR Writer report, you must complete the following critical steps:

1. When defining the report on HR Writer Title Creation (HR65.1) (Page 7), you must include a name for you file in the Spreadsheet Name field. **This name can be a maximum of 10 characters.**



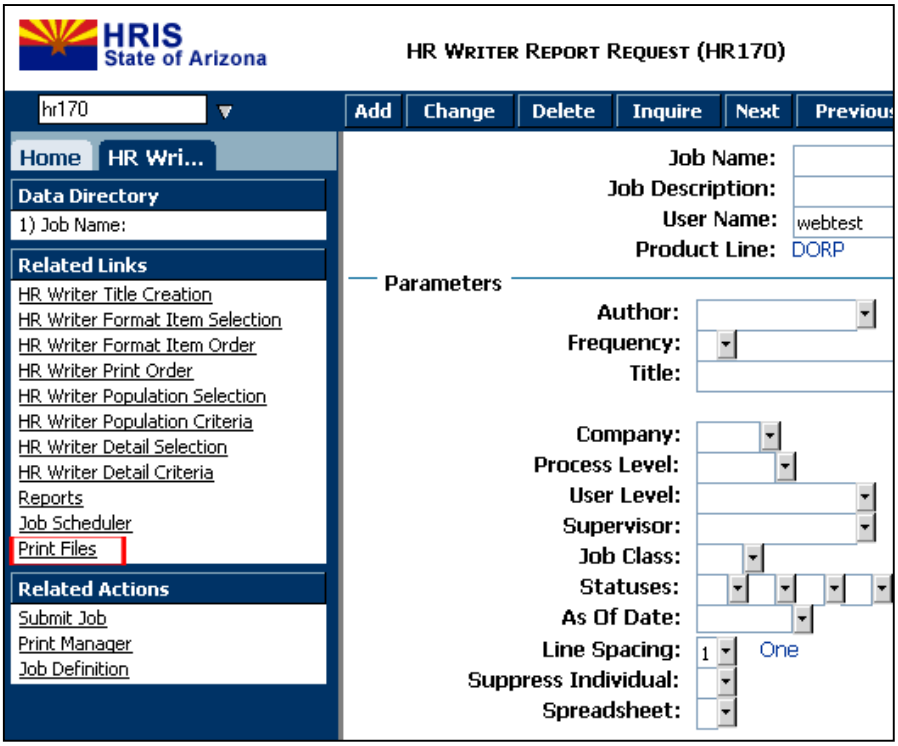

2. When setting up the HR Writer Report job on the HR Writer Report Request (HR170.1) (Page 27), you must turn on the Spreadsheet flag, by placing a 'Y' in the Spreadsheet field.



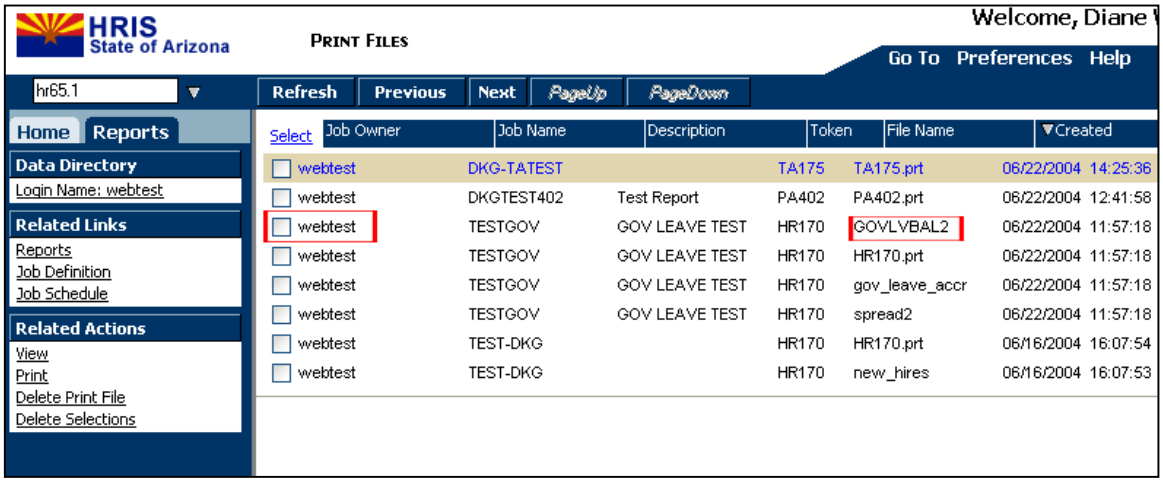
3. If you forget these steps the first time you run the report, you can always go back to the HR65.1 and HR170, change the information, then click the Change Button.

If both of these steps have been completed, and you have submitted your HR170 job to process, then to download your CSV file to your machine, complete the following steps:

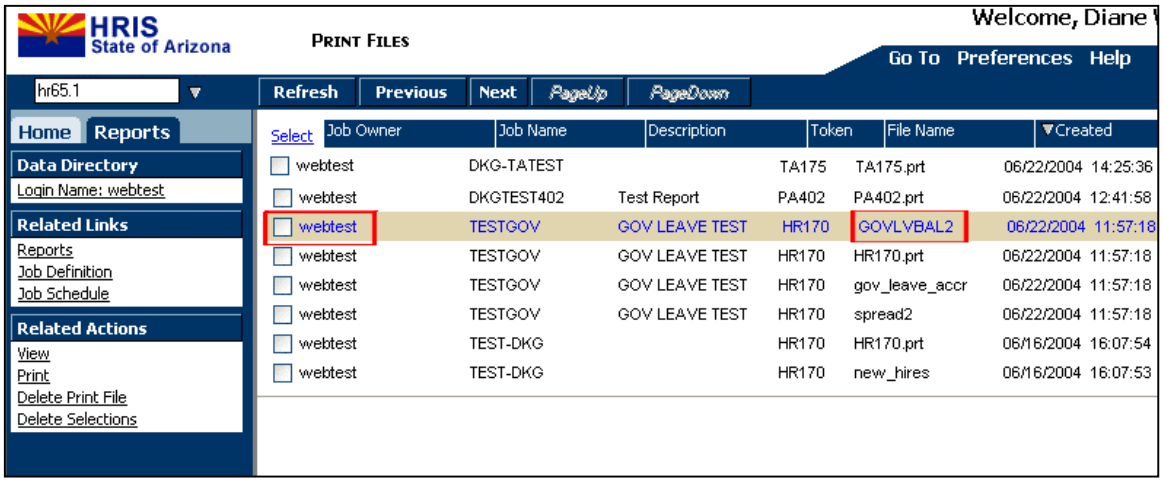
1. From the HR170, Click on the Print Files link under Related Links



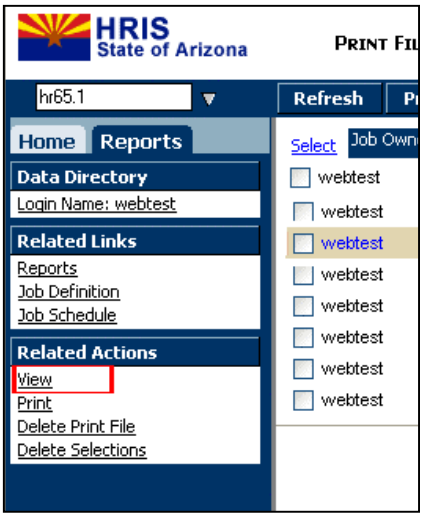

2. Locate the CSV file name you created on the HR65.1 (the name should appear in the File Name column if the job has been processed).



3. Click on your CSV file in the Print Manager (the row should be highlighted).

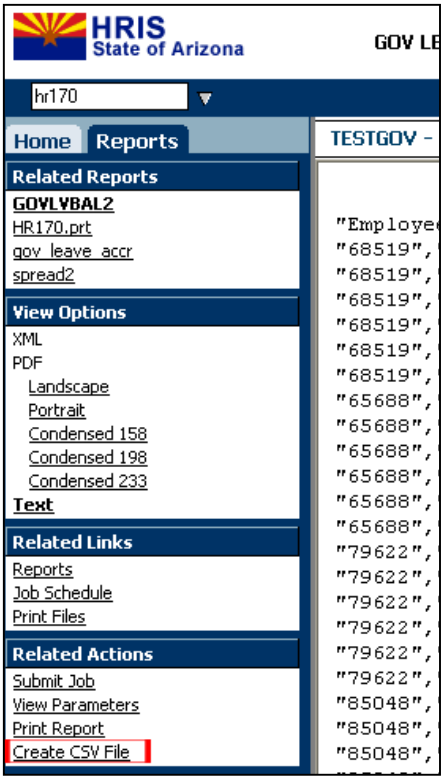



4. Click View under Related Actions – this should open the results of your report.

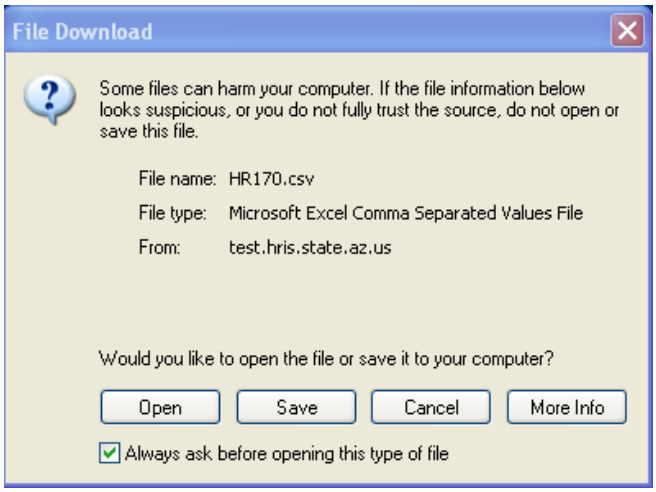



| | |
|---|---|
| **Warning**: If you receive an error message when the report opens that states “Internal Server Error, The server encountered an internal error or misconfiguration and was unable to complete your request….” | Check your View Option. CSV files will not work in PDF format. To resolve this, change the format to Text. |

5. Click Create CSV File under Related Actions – this should open the File Download feature on your machine.




6. Click Open – this should open the CSV file in Excel, and you can now save the CSV file as an MS Excel file.




- You can also Click Save, then choose a location on your machine to store the file as a CSV file. Once stored you can open it in other applications such as MS Word, etc.

# Appendix E – Submit and Access Results of a Report Job

After a report job has been setup and 'added' to the system using the Add button, you must submit the report to HRIS to process. Only after the report has been submitted and processed, will results be available for you to view.

Once the job has been submitted, you will want to check the status of the job using the Job Scheduler. The job schedule is available to show you whether your job is Waiting, Active or Completed.

After the job has reached a Completed status, you can then access the report results in one of two places:

- Reports Queue
- Print Files Queue

Once the report results are open, you have the option of printing the results, saving the results to your hard drive, or exporting the results into a Comma Separated Value (CSV) file.

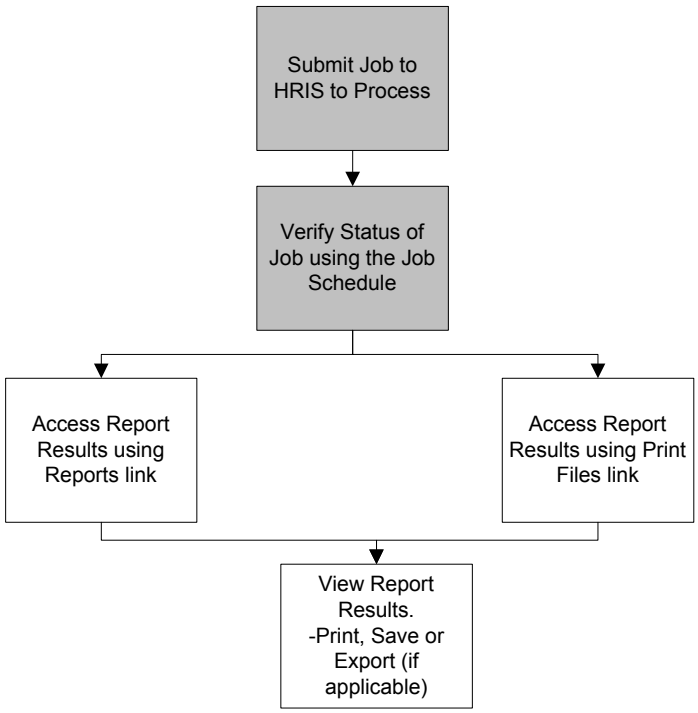
## *Report Submission and Access Flow Chart*

**Required forms appear as:**

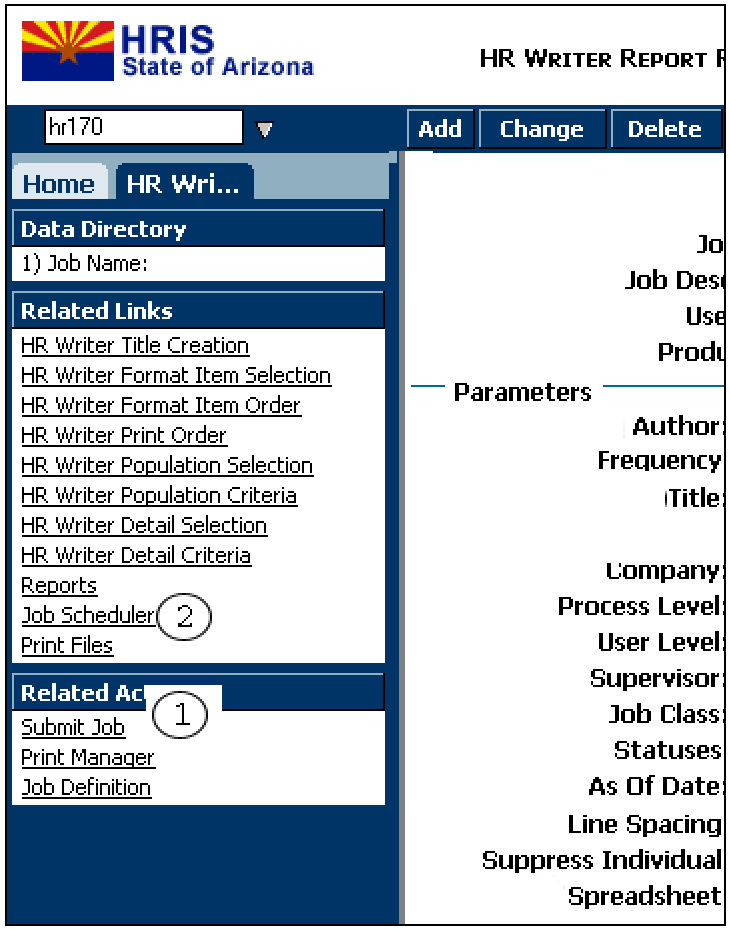
Process Applicant on XP31.1

**Optional forms appear as:**

Process HR20.1 – Additional Contacts



## *Submit Report Job*



| | HRIS Field | R/O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| 1 | **Submit Job** link | R | Click **Submit** under Related Actions to submit job to process.<br><br>Job **Submit** window opens.<br><br>Click Submit button again. | Receive message "Job has been submitted". | You must have clicked 'Add' or 'Change' to save the report parameters in HRIS BEFORE clicking Submit. |
| 2 | **Job Scheduler** link | R | Click Job Scheduler (under Related Links) to check the status of a job. | This will take you to the Job Scheduler. Use the job schedule to determine the current status of your job. | Job must be in Normal Completion and appear in the Completed tab to be available to view under the Print Files or Reports link.<br><br>You cannot view report results through the job scheduler, you can only view the status of the report job.<br><br>See Verify Job Status using the Job Schedule Link (Page 46) |

## *Verify Job Status using the Job Schedule Link*

The Job Scheduler should be used to check the status of a submitted job. The job can only be viewed in the Reports Link or Print Files Link when it appears in the Completed tab (under Filter Options).

HRIS State of Arizona

JOB SCHEDULE

Welcome,

Go To Preferences Help

hr170 (1)

Refresh | Previous | Next | PageUp | PageDown

Home | Reports

**Data Directory**

Login Name: train18

**Filter Options**

Active
**Completed**
Waiting
(2)

**Related Links**

Reports
Job Definition
Print Files
(4)

**Related Actions**

View Log
Submit
Delete
Delete Selections
(5)

| Select | Name | Description | Start Date | Stop Date | Status |
|---|---|---|---|---|---|
| | SALARY (3) | SALARY REPORT | 10/13/2004 15:39:04 | 10/13/2004 15:39:39 | Normal Completion |
| | ELIST2 | ACTIVE EMPLOYEE LIST 110695 | 10/13/2004 11:51:51 | 10/13/2004 11:52:12 | Normal Completion |
| | SALARY | EMPLOYEE SALARY REPORT | 10/12/2004 15:34:06 | 10/12/2004 15:34:38 | Normal Completion |
| | DEDUCT | MANUALLY SETUP DEDUCTIONS | 10/12/2004 15:26:14 | 10/12/2004 15:27:18 | Normal Completion |
| | NOTERM | EMPLOYEE TERM INFO | 10/12/2004 14:48:14 | 10/12/2004 14:48:50 | Normal Completion |
| | EEBAL1 | DKG-EEBAL1 | 10/12/2004 14:38:15 | 10/12/2004 14:38:48 | Normal Completion |
| | EEBAL | EMPLOYEE PLAN BALANCE | 10/12/2004 14:35:29 | 10/12/2004 14:36:06 | Normal Completion |
| | EEOVT | EMPLOYEES PAID OVERTIME | 10/12/2004 14:31:37 | 10/12/2004 14:32:59 | Normal Completion |
| | ELIST2 | ACTIVE EMPLOYEE LIST 110695 | 10/12/2004 14:22:07 | 10/12/2004 14:22:28 | Normal Completion |
| | EELIST | HR Writer Report Request | 10/12/2004 14:14:05 | 10/12/2004 14:14:38 | Normal Completion |
| | BIRTH | BIRTHDAY LIST | 10/12/2004 14:09:08 | 10/12/2004 14:09:41 | Normal Completion |
| | TERM | TERM EMP 01/01/04-06/30/04 | 10/12/2004 13:52:50 | 10/12/2004 13:53:22 | Normal Completion |
| | PRESCE | LIST OF PRESCOTT EMPLOYEES | 10/12/2004 13:39:59 | 10/12/2004 13:40:31 | Normal Completion |

| | HRIS Field | R O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| 1 | **Refresh** button | R | Click **Refresh** to update the report results in the queue. | The screen will refresh | Queue does not refresh automatically. If job is not in 'Normal Completion' status, click refresh to update the queue. This can be done multiple times, until job reaches the 'Normal Completion' status. |
| 2 | **Filter Options** section | R | Click on **Active**, **Completed** or **Waiting** to see the status of your Job. | The appropriate screen will appear.<br><br>The current filter option will appear in **bold**. (In the example above, **Completed** is the current filter option)<br><br>To be available for display, report job must be in Normal Completion status and appear in the Completed view. | The filter options available are:<br>• Active –your job is processing in HRIS.<br>  ○ In this filter option, continue to click Refresh until you receive the message 'No active jobs'.<br>• Completed – your job has finished processing and is ready for review<br>• Waiting – you job is waiting to be processed or may need recovery. If your job states 'needs recovery' contact HRIS for assistance.<br><br>To see the results you must access the Reports link or the Print Files link. (See Step 4) |
| 3 | **Report Job Name** link | R | Click the row for the job you are checking. | This row will be highlighted.<br><br>The row displays the Name of | If your job is completed, you can now view your results. (See Step 4) |

| | HRIS Field | R<br>O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| | | | | the Job, Description, Start and Stop Date, and Status. | If you do not want to view your job results, you can also complete any of the actions under Related Actions (See Step 5). |
| 4 | **Related Links:**<br>**Reports**<br>**Job Definition**<br>**Print Files** links | R | Click on one of the following to access report results:<br>• **Reports** link – this queue will display all the reports you have processed, including those not in Normal Completion status.<br>• **Job Definition** – This link is not used.<br>• **Print Files** – this queue can be used to display all of your reports that have been processed. | Depending on the link selected, either the Reports queue or the Print Files queue will open.<br><br>For instructions on the Reports queue – See the Access Report Results using the Reports Link (Page 53)<br><br>For instructions on the Print Files queue – see the Access Report Results using the Print Files Link (Page 50) | It is not required to access both Print Files and Reports to view results. You only need to access one of the two.<br><br>If you do not want to display results, see the next step for additional options. |

| | HRIS Field | R<br>O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| 5 | **Related Actions:**<br>**View Log**<br>**Submit**<br>**Delete**<br>**Delete Selection**<br>links | O | To perform any of these related actions, you must have a check mark in the select box of the row you are updating.<br>• View Log – Click View Log to display job log information<br>• Click Submit to resubmit the job to process.<br>• Click Delete to delete the specific highlighted job.<br>• Click Delete Selections to delete multiple jobs. All jobs must have a check mark in the select box to be included in the delete. | Depending on the action performed, you will either see additional information, or be asked to confirm an action (Submit, Delete, etc). | You should never resubmit a job to process while that job is processing (it is in active or waiting status). Please allow the first job to process before resubmitting. |

## *Access Report Results using the Print Files Link*

The Print Files Link is one of two options that can be used to access your completed results. The reports results will be sorted by creation date in descending order.

HRIS State of Arizona

PRINT FILES

Welcome,

Go To Preferences Help

hr170 (1)

Refresh | Previous | Next | PageUp | PageDown

Home | Reports

**Data Directory** (3)

Login Name: train18

**Related Links**

Reports
Job Definition
Job Schedule

**Related Actions**

View (3)
Print
Delete Print File
Delete Selections (4)

| Select | Job Owner (2) | Job Name | Description | Token | File Name | Created |
|---|---|---|---|---|---|---|
| ☐ | train18 | SALARY | SALARY REPORT | HR170 | HR170.prt | 10/13/2004 15:39:38 |
| ☐ | train | SALARY | SALARY REPORT | HR170 | DRSALARY | 10/13/2004 15:39:37 |
| ☐ | train | SALARY | SALARY REPORT | HR170 | drg-salary | 10/13/2004 15:39:37 |
| ☐ | train | SALARY | SALARY REPORT | HR170 | spread2 | 10/13/2004 15:39:37 |
| ☐ | train18 | ELIST2 | ACTIVE EMPLOYEE LIST 110695 | HR170 | DRELIST2 | 10/13/2004 11:52:10 |
| ☐ | train18 | ELIST2 | ACTIVE EMPLOYEE LIST 110695 | HR170 | HR170.prt | 10/13/2004 11:52:10 |
| ☐ | train18 | ELIST2 | ACTIVE EMPLOYEE LIST 110695 | HR170 | drg-active_emp | 10/13/2004 11:52:10 |
| ☐ | train18 | ELIST2 | ACTIVE EMPLOYEE LIST 110695 | HR170 | spread2 | 10/13/2004 11:52:10 |
| ☐ | train18 | SALARY | EMPLOYEE SALARY REPORT | HR170 | DGSALARY | 10/12/2004 15:34:37 |
| ☐ | train18 | SALARY | EMPLOYEE SALARY REPORT | HR170 | HR170.prt | 10/12/2004 15:34:37 |
| ☐ | train18 | SALARY | EMPLOYEE SALARY REPORT | HR170 | spread2 | 10/12/2004 15:34:37 |
| ☐ | train18 | SALARY | EMPLOYEE SALARY REPORT | HR170 | dkg-salary | 10/12/2004 15:34:36 |

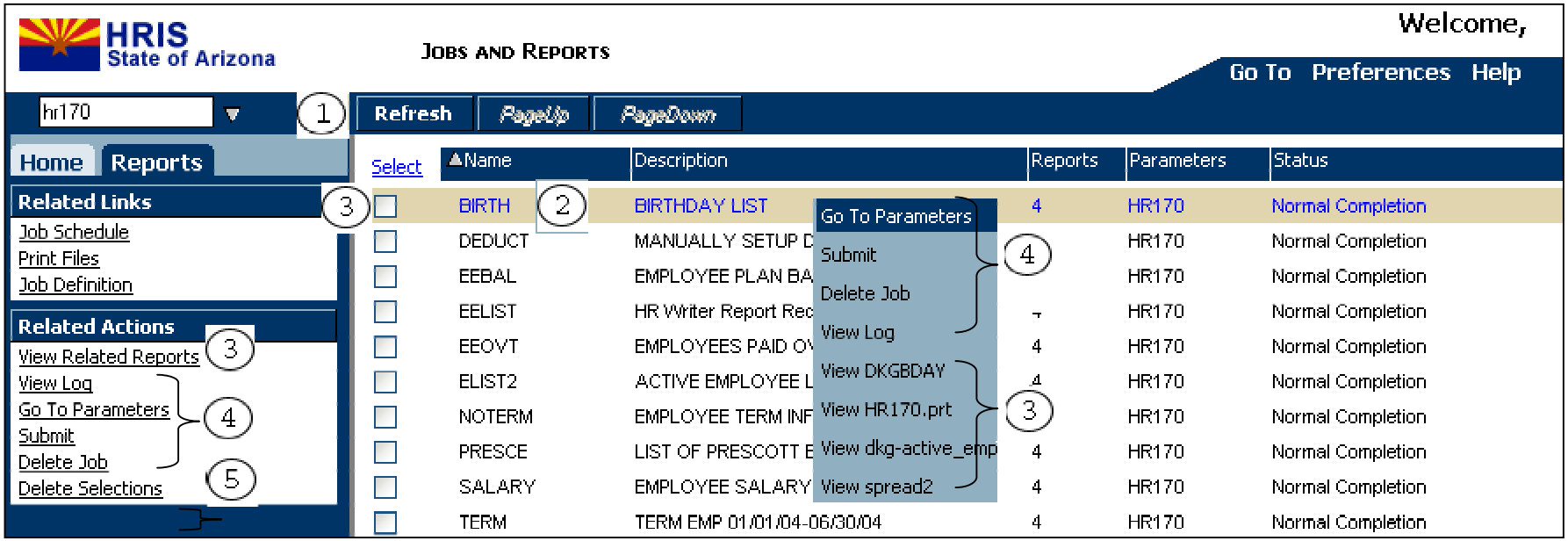
View (3)
Print
Delete Print File

| | HRIS Field | R/O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| 1 | **Refresh** button | R | Click refresh to update the report results in the queue | The screen will refresh | The report results will appear in the Print Files queue, only if they have reached 'Normal Completion' status in the Job Schedule. If report results do not appear, you may have to either:<br>• Check the status in the Job Schedule queue<br>• Click refresh until they do. |
| 2 | **Report Name** link | R | Locate the row for the job you would like to view. | All completed report jobs will be displayed in this queue. | Each HRIS Report creates a number of different files; you must always verify in the File Name column that you are clicking on the report you created.<br><br>For HR Writer Reports, Lawson creates additional files like HR170.prt and spread2 will not display your data. The HR170 will display your report job parameters, and the spread2 file displays your spreadsheet name. |
| 3 | **Related Actions: View Option** link | R | You can display report results one of two ways:<br>• Click anywhere on the display line for the report, click your right mouse button and select 'View' from the drop down menu.<br><br>Or<br><br>• Click the select box at the beginning of the | If the select box is used, A ☑ will appear in each selected row.<br><br>The report results will display. For instructions on viewing the report results, see Reviewing Report Results (Page 57) | The Print option under Related Actions and displayed in the drop down menu both open a print feature that requires a Lawson defined printer. Since the State of Arizona does not use Lawson defined printers, instructions will be provided in the Reviewing Report Results section of this manual on how to print.<br><br>See the Reviewing Report Results (Page 57) section for instructions on printing, saving and exporting your |

| | HRIS Field | R/O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| | | | report line and click 'View' under related actions. | | report results.<br><br>• If you do not want to view your results, instead you want to delete the files, complete Step 4. |
| 4 | **Related Actions: Delete Print File** Option under Related Actions | O | If you have placed a check mark in the **Select Box** for the row you would like to delete, then Click **Delete Print File** under Related Actions | System will ask for confirmation to delete, Click **OK**. File is deleted. | |
| | **Related Actions: Delete Selections** Option under Related Actions | O | If you have placed multiple check marks in the **Select Boxes** for the row you would like to delete, then Click **Delete Selections** under Related Actions. | System will ask for confirmation to delete, Click **OK**. File is deleted. | |

## *Access Report Results using the Reports Link*

The Reports Link is the second of two options that can be used to review your completed results. The reports results will be sorted alphanumeric by job name.



| | HRIS Field | R/O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| 1 | **Refresh** button | R | Click refresh to update the report results in the queue | The screen will refresh | Queue does not refresh automatically. If job is not in 'Normal Completion' status, click refresh to update the queue. This can be done multiple times, until job reaches the correct status. |
| 2 | **Report Name** link | R | Locate the row for the job you would like to view. | All report jobs will be displayed in this queue. | Report must be in Normal Completion status to view results. |
| 3 | **Related Actions: View** options | R | You can display report results one of two ways:<br>• Click anywhere on the display line for the report, click your right mouse button and from the Selection menu click 'View' from the drop down menu for the file you wish to display.<br><br>Or<br><br>• Click the select box at the beginning of the report line and click 'View Related Reports' under related actions. | If the select box is used, A ☑ will appear in each selected row.<br><br>The report results will display. For instructions on viewing the report results, see Reviewing Report Results (Page 57) | Each HRIS Report creates a number of different files; you must always verify in the File Name column that you are clicking on the report you created.<br><br>**Example for Selection Menu**<br>• The report file in the graphic above is View dkg-active_emp<br>• The spreadsheet file in the graphic above is View DKGBDAY<br>• For HR Writer Reports, Lawson creates additional files like HR170.prt and spread2 will not display your data. The HR170 will display your report job parameters, and the spread2 file displays your spreadsheet name. |

| | HRIS Field | R/O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| 4 | **Related Actions: View Log** Option | O | If using the drop down menu, Click **View Log** to display Job Log information.<br><br>If using the select box, you must place a check in the box for the selected row before clicking on **View Log** under Related Actions. | Job Log will open. | |
| | **Related Actions: Go to Parameters** Option | O | If using the drop down menu, Click the **Go to Parameters** link if you would like to review your report job setup parameters.<br><br>If using the select box, you must place a check in the box for the selected row before clicking on **Go to Parameters** under Related Actions. | Report setup page will open and display report job setup. | |
| | **Related Actions: Submit** Option | O | If using the drop down menu, Click **Submit** to resubmit the job to process.<br><br>If using the select box, you must place a check in the box for the selected row before clicking on **Submit** under Related Actions. | | You should never resubmit a job to process while that job is processing (it is in active or waiting status). Please allow the first job to process before resubmitting. |

| | HRIS Field | R/O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| | **Related Actions: Delete Job** Option under Related Actions | O | If using the drop down menu, Click Delete Job to delete the specified row.<br><br>If using the select box, you must place a check in the Box for the selected row before clicking **Delete Job** under Related Actions | System will ask for confirmation to delete, Click **OK**. File is deleted. | |
| 5 | **Related Actions: Delete Selections** Option under Related Actions | O | If you have placed multiple check marks in the **Select Boxes** for the row you would like to delete, then Click **Delete Selections** under Related Actions. | System will ask for confirmation to delete, Click **OK**. File is deleted. | |

## *Reviewing Report Results*

From either the Print Files link, or the Reports link you can view the results of your job. You can change how your results are displayed, or print the results.

HRIS State of Arizona

HR WRITER REPORT REQUEST

Welcome, Train18

Go To Preferences Help

hr170

Home Reports

DKG-BIRTH - /dorp/lawson/apps/print/train18/dkg-birth/1/dkg-active_emp

**Related Reports**

DKGBDAY
HR170.prt
**dkg-active_emp**
spread2

(1)

**View Options**

XML
PDF
**Landscape**
Portrait
Condensed 158
Condensed 198
Condensed 233
Text

(2)

**Related Links**

Reports
Job Schedule
Print Files

(6)

**Related Actions**

Submit Job
View Parameters
Print Report
Create CSV File

(5)

(4)

90%

Bookmarks Thumbnails Comments Signatures

HR Writer Report Request (3)

```
HR170 Date 10/12/04                Human Resource Writer Report Generation                    Page    1
      Time 14:09
                                   Author: TRAINING     Title: DKG-ACTIVE EMP BIRTHDAY LIST

                                  Report Selection Criteria

Item Group    Inc/Exc   Item Name          Beginning Value          Ending Value              Select Type
----------    -------   ---------          ---------------          ------------              -----------
                  E     Status             T1                       T3                        Population
                  E     Status             R1                       R3                        Population
                  E     Status             U1                       U2                        Population

    Data For Entered Company    1

                                  Report Sort Order

Item Name              Total Indicator
---------              ---------------
Birthdate - Month      No Total Break
Birthdate - Day        No Total Break
Process Level          No Total Break
Name - Last            No Total Break
```

1 of 4 11 x 8.5 in

| | HRIS Field | R/O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| 1 | **Related Reports** links | R | Click on the file you want to display. | | Each HRIS Report creates a number of different files; you must always verify under Related Reports the file you are viewing. The active file will be highlighted.<br><br>**Example**<br>• The report file in the graphic above is View dkg-active_emp, it is currently the active file.<br>• The spreadsheet file in the graphic above is DKGBDAY<br>• For HR Writer Reports, Lawson creates additional files like HR170.prt and spread2 will not display your data. The HR170 will display your report job parameters, and the spread2 file displays your spreadsheet name. |
| 2 | **View Options** links | R | Select the display option for your report results. | Report results will open. | Depending on the file selected under Related Reports and the option selected under View Options, report results will display in a different format:<br>• To view a **spreadsheet** file, you must have the View Options set to **Text**.<br>  ○ Spreadsheet files cannot be displayed in PDF or XML, you will receive an error message.<br>• To view the **report** file, you can |

| | HRIS Field | R/O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| | | | | | select either **PDF** or **Text**.<br>o PDF view will be used to print results or save the report to your hard drive.<br>o Text view will be used to access the Lawson Drill Around Feature.<br>o XML – view results and access HRIS drill around. Not all computers support XML viewing.<br><br>When displaying the report file, regardless of the view option, HRIS will display the selection criteria as the first page of the report. You must page down to see report results. |
| 3 | **Report Results** | R | Report results will be displayed in the format selected under View Options. | | You must scroll up/down (Page UP and Page Down can also be used) to see all the results of the report. |
| 4 | **PDF Option – Menu items** | O | This is only available, if you have selected a PDF option under View Options.<br><br>Click on any button in the menu to perform an action. | The action will be performed based on the button selection. | Once in PDF view, you can click the print button or the save button to perform these additional actions on your report results. |
| 5 | **Related Actions** link | O | **Submit Job** - Click **Submit Job** to resubmit the job to process (if applicable)<br><br>**View Parameters** - Click on this link to be returned to the | | **View Parameters** – Returns you to the Job Parameters setup page for the report.<br><br>**Create CSV File** – before using this button, you must make sure you are in |

| | HRIS Field | R/O | Step/Action | Expected Results | Additional Information |
|---|---|---|---|---|---|
| | | | job setup page (if applicable)<br><br>**Print Report** – To print the report you must click the Print Button on the PDF Menu Items. The Print Report link cannot be used.<br><br>**Create CSV File** – Click to export results into a spreadsheet. | | the spreadsheet file under Related Reports and the results are displayed as Text under View Options. |
| 6 | **Reports** link | O | Click Reports (under Related Links) to access your Reports Queue. This queue will contain all the reports you have processed. | This will take you back to the Reports link. It will show all jobs being run, not just those that are completed. | See Access Report Results using the Reports Link (Page 53) |
| | **Job Schedule** link | O | Click Job Scheduler (under Related Links) to check the status of a job. | This will take you back to the Job Scheduler. Can be used to check the status of a job. | See Verify Job Status using the Job Schedule Link (Page 46) |
| | **Print Files** link | O | Click Print Files (under Related Links) to display results. | This will take you back to the Print Files that are completed | See Access Report Results using the Print Files Link (Page 50) |