



**State of Oklahoma  
COR107 HRMS View Only Manual**

**Revised: April 7, 2008**





## CORE Oklahoma

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## Table of Contents

<b>VIEW ONLY SECURITY .....</b>	<b>6</b>
<b>PERSONAL DATA INFORMATION.....</b>	<b>7</b>
<b>Personal Data Tabs .....</b>	<b>7</b>
Name History Tab .....	8
Address History Tab.....	9
Personal History Tab.....	10
Identity/Diversity Tab .....	11
MDC Review Qualifications Tab.....	12
Search for National ID .....	13
<b>JOB DATA INFORMATION.....</b>	<b>14</b>
Work Related Tabs .....	14
Work Location Tab .....	15
Job Information Tab .....	16
Payroll Tab .....	17
Salary Tab .....	18
Compensation Tab.....	19
MDC Job Data Tab .....	20
Employment Information Link.....	21
Time and Labor Link.....	22
Job Earnings Distribution Link .....	23
Benefit Program Participation Link .....	24
<b>INQUIRY DATA INFORMATION.....</b>	<b>25</b>
<b>Position, Job and Budget Summary Tabs .....</b>	<b>25</b>
Position Data Summary – General Tab.....	26
Position Data Summary – Work Location Tab .....	27
Position Data Summary – Payroll Info Tab .....	28
Position Data – Job Information Tab (Unclassified Cite Code).....	29
Position Data – Specific Information Tab.....	30
Position Budget Status Tab .....	31
Job Summary – General Tab.....	32
Job Summary – Job Information Tab.....	33
Job Summary – Work Location Tab .....	34
Job Summary – Compensation Tab .....	35



<b>RUN HR REPORTS .....</b>	<b>36</b>
Step 1 – Select Report .....	36
Step 2 – Set Up Run Control ID .....	37
Step 3 – Select Run Control ID .....	38
Step 4 – Select Process Monitor .....	41
Step 5 – Select View Log/Trace .....	43
Step 6 – Choose Report .....	44
<b>RUN PAYROLL REPORTS .....</b>	<b>45</b>
Step 1 – Select Report .....	45
Step 2 – Select Run Control ID .....	46
Step 3 – Enter Parameters.....	47
Step 4 – Select Process Monitor .....	49
Step 5 – Select View Log/Trace .....	51
Step 6 – Choose Report .....	52
<b>RUN QUERIES.....</b>	<b>53</b>
Step 1 – List Queries .....	53
Step 2 – Select Query .....	54
Step 3 – Enter Parameters – View Results .....	55
Step 4 – Download to Excel Spreadsheet.....	56
<b>HRMS RESOURCES.....</b>	<b>57</b>
<b>OSF NOTIFICATION GROUPS.....</b>	<b>58</b>
Step 1 – Subscribe .....	58
Step 2 – Unsubscribe .....	60
Step 3 – Manually Unsubscribe.....	62



## VIEW ONLY SECURITY



- The View Only users will be able to scroll through History.
- A security form must be completed called OSF Form 304 before View Only Access will be provided. Send the completed form to the CORE Security Lead, (contact and directions provided on the last page of the OSF Form 304).
- CORE Security Form Website Link:  
<http://www.ok.gov/OSF/documents/osf304.pdf>
- Check the following boxes on the OSF Form 304 to receive the correct access:

**Human Resources**

**View Position Data**  
**View Employee Data**  
**View Job Data**  
**View Setup**  
**HR Report Requestor**

**Payroll**

**Agency Payroll View Only**  
**Payroll Report Requestor**

**Time and Labor**

**Time & Labor Supervisor - Field**  
**Benefits**  
**View Only Transaction**  
**View Only Benefits**  
**Additional Pay View Only**

**Miscellaneous**

**Run Queries**



# PERSONAL DATA INFORMATION

## PERSONAL DATA TABS

- Name History Tab
- Address History Tab
- Personal History Tab
- Identity / Diversity Tab
- MDC Qualification Tab
- Search for National ID – (Social Security Number)



## NAME HISTORY TAB

The screenshot shows the PeopleSoft interface for the 'Name History' tab. At the top, there is a navigation bar with 'Home', 'Help', and 'Sign Out' buttons. Below this is a breadcrumb trail: 'Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data'. The 'Name History' tab is selected, and a red arrow points to it. The 'Name Type' section shows 'Primary' and navigation arrows for 'First', '1 of 1', and 'Last'. The 'Name History' section shows an 'Effective Date' of '01/01/2008' and 'Format Using: USA United States'. The 'Person Name' section shows 'First: Jane', 'Last: Doe', and 'Name: Doe, Jane'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous tab', 'Next tab', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'. A breadcrumb trail at the bottom reads: 'Name History | Address History | Personal History | Identity/Diversity | MDC Review Qualifications'.

- Use the arrows on the Name Type Title Bar to page through the various names, i.e., preferred and or maiden names.
- All previously entered names can be viewed. Use the arrows on the Name History Title Bar to page through previous names.
- Notice the navigation is at the top of the screen.
- Notice the tab links are also at the bottom of the screen.
- PeopleSoft is a web based application, however, **DO NOT** use the **BACK** Button! The links will not always remain connected.



## ADDRESS HISTORY TAB

PeopleSoft.

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity MDC Review Qualifications

100307,Employee Employee EmpID: 100307

Address Type View All First 1 of 2 Last

'Address Type: Home

Address History View All First 1 of 1 Last

'Effective Date: 03/01/2004 'Status: Active

Country: USA United States

Address 1: 100307 Employee Way

Address 2:

Address 3:

City: Bethany

County: 00 Postal: 73008

State: OK Oklahoma

Phones First 1-2 of 2 Last

'Phone Type	Telephone		
Home	405/787-7456	+	-
Main	405/787-7456	+	-

Email Addresses First 1 of 1 Last

'Email Type	'Email Address		
		+	-

Save Return to Search Next in List Previous in List Previous tab Next tab Refresh Update/Display Include History Correct History

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [MDC Review Qualifications](#)

- Various address types are available. Use the arrows on the Address Type, (Blue Title Bar) to page through the various addresses or Click **View All** and use the scroll bar.
- All previously entered addresses can be viewed. Use the arrows on the Address History Title Bar to page through the previous addresses or Click **View All** and use the scroll bar.
- Note various Phone Types can be recorded.
- The Update Display mode shows only the current and future records.
- At the bottom of the screen you can click the **Include History** Link to view additional data.



## PERSONAL HISTORY TAB

PeopleSoft.

Home Worklist Help Sign

Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity MDC Review Qualifications

100307, Employee Employee EmpID: 100307

Personal Data View All First 1 of 1 Last

Effective Date: 03/01/2004  
Gender: Female  
Alternate Employee ID:  
Highest Education Level: Not Indicated  
Language Code:  
Marital Status: Unknown As of:  
 Full-Time Student  Smoker As of:  
USA  
Military Status: Not indicated  
Date Entitled to Medicare:  
 I-9 Completed  E-Verify Process Complete  
Employment Eligibility Proof  
1: 2:

Save Return to Search Previous tab Next tab Refresh Update/Display Include History Correct History

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [MDC Review Qualifications](#)

- Effective Date Field – required.
- Gender Field – required. Field used for EEO Processing.
- Military Status Field – required.
- I-9 and E-Verify Process Fields – required per HB 1804.
- Each agency should choose a consistent method of designating the Employment Eligibility Proof Fields, i.e., (I-9 Documents). For example: 1<sup>st</sup> Field always used for DL# and 2<sup>nd</sup> Field used for SS#. Following are examples of a few other acceptable documents to use, however, this list is not the complete list: US Passport, Certificate of US Citizenship, Certificate of Naturalization, Birth Certificates, and Military ID's.



### IDENTITY/DIVERSITY TAB

PeopleSoft

Home Worklist Help Sign

Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity Review Qualifications

100307,Employee Employee EmpID: 100307

Date of Birth: 03/07/1957 Birth Country: [ ] [ ]  
Age: Years 51 Months 0  
Date of Death: [ ] [ ] Birth Location: [ ] [ ]  
 Waive Data Protection Original Hire Date: 03/01/2004 [ ] [ ] USA

Referral Source View All First 1 of 1 Last  
Effective Date: 03/12/2008 [ ] [ ]  
Referral Source: Unknown Referral Source Subcategory: [ ] [ ]  
Employee Referral ID: [ ] [ ]  
Specific Referral Source: [ ] [ ]  
 Applicant is a family member  
 Previously Employed by Company

National ID View All First 1 of 1 Last

Country	National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	011-10-0307	<input checked="" type="checkbox"/>

USA

Ethnic Group View All First 1 of 1 Last  
Regulatory Region: USA United States Ethnic Group: WHITE White  Primary

Save Return to Search Next in List Previous in List Previous tab Next tab Refresh Update/Display Include History Correct History

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [MDC Review Qualifications](#)

- Date of Birth Field – required for payroll to process.
- Social Security Number – must be entered from the SSN Card.



## MDC REVIEW QUALIFICATIONS TAB

The screenshot shows the PeopleSoft interface for the 'MDC Review Qualifications' tab. The breadcrumb trail is: Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data. The employee information is: 100307, Employee, Employee, EmpID: 100307. The 'Review Qualifications' table is highlighted with a red circle and contains the following data:

	Job Code	Company	Date	Review Status	
1	E17A Administrative Assistant	185	05/15/2007	Approved	+ -
2	E17B Administrative Assistant	340	07/09/2007	Approved	+ -

Below the table are buttons for Save, Return to Search, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History. Navigation links at the bottom include Name History, Address History, Personal History, Identity/Diversity, and MDC Review Qualifications.

- This is an Office of Personnel Management, (OPM) Tab. All Qualification Reviews are available through this tab. The agency can review this tab to see if promotions, or job changes have been Accepted.
- The Office of Personnel Management enters the determined Job Code for all agencies with exception of DHS, ODOT, and JD McCarty Center.



## SEARCH FOR NATIONAL ID

The screenshot shows the PeopleSoft interface for searching by National ID. At the top left is the PeopleSoft logo. A navigation bar contains links for Home, Worklist, Help, and Sign Out. Below this is a breadcrumb trail: Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Search by National ID. A 'New Window' link is on the right. The main search area has a header 'Search by National ID' and a search box. Below the search box are two input fields: 'National ID:' with an empty text box, and 'Search in:' with a dropdown menu set to 'Employees'. A yellow 'Search...' button is to the right. Below the search area is a table header with columns: National ID, EmpID, Name, Country, and National ID Type. The table body is currently empty. Navigation controls for the table include 'View All', 'First', '1 of 1', and 'Last'.

- Type in the Social Security Number in the National ID Field, only if the employee is currently employee within your agency.
- Click the Search button.



# JOB DATA INFORMATION

## WORK RELATED TABS

- [Work Location Tab](#)
- [Job Information Tab](#)
- [Payroll Information Tab](#)
- [Salary Plan Tab](#)
- [Compensation Tab](#)
- [MDC Job Data Tab](#)
- [Employment Information Link](#)
- [Time Reporter Data Link](#)
- [Job Earnings Distribution Link](#)
- [Benefit Program Participation Link](#)



### WORK LOCATION TAB

The screenshot shows the PeopleSoft interface for the 'Work Location' tab of an employee. The employee ID is 100307. The 'Empl Rcd#' field is set to 0 and is circled in red with a red arrow pointing to it. Below this, the 'Effective Date' is 11/01/2007 and the 'Effective Sequence' is 0. The 'Position Number' is 34000852, and the 'Location' is 216. At the bottom of the form, the 'Include History' button is circled in red with a red arrow pointing to it. Other buttons like 'Update/Display' and 'Correct History' are also visible.

- Select **Include History** button to see all Job transactions. Legacy history is available on the system, however, if a new hire is currently in PeopleSoft, history will be available only to the new agency.
- Location Field – where the employee is physically located within the agency.
- NOTE the Effective Sequence Number. If it is greater than 0, more than one row of data was entered on the stated effective date. Use the arrows on the Work Location Bar to page through the records.



### JOB INFORMATION TAB

PeopleSoft.

Home Worklist Help Sign

Home > Administer Workforce > Administer Workforce (GEL) > Use > Job Data [New Window](#)

Work Location Job Information Payroll Salary Plan Compensation MDC Job Data

100307\_Employee Employee EmplID: 100307 Empl Rcd#: 0

**Job Information** First 1 of 15 Last

Effective Date: 11/01/2007 Effective Sequence: 0 Job Indicator: Primary Job  
 Action / Reason: Data Change Change Department Current

'Job Code: E17B Administrative Assistant Entry Date: 07/09/2007 Planned Exit:   
 End Job Automatically

Supervisor Level:

'Regular/Temporary: Regular 'Full Part: Full-Time

Empl Class: Perm Class 'Officer Code: None

'Regular Shift: N/A Shift Rate:  /

Standard Hours: 40.00 FTE: 0.00

Work Period: W Weekly

Contract Number:  Contract Type:

USA

'FLSA Status: Nonexempt  
'EEO Class: None  
Work Day Hours: 8.00

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [MDC Job Data](#)

- Job Information Tab concerns the employee’s actual job type; Under Fill, Supervisor, Temporary, Probation or Trial Period.
- Empl Class Field – valid values include Permanent, Probation, Trial Period or Unclassified.
- FLSA Field – valid values are either Nonexempt or No FLSA.
- EEO Class Field – (Equal Employment Opportunity, EEO), field valid values are None = No special class, Exclude = from EEO Reporting.



# PAYROLL TAB

PeopleSoft

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data [New Window](#)

Work Location Job Information Payroll Salary Plan Compensation MDC Job Data

100307,Employee Employee EmpID: 100307 Empl Rcd#: 0

**Payroll Info** First 1 of 15 Last

Effective Date: 11/01/2007 Effective Sequence: 0 Job Indicator: Primary Job  
 Action / Reason: Data Change Change Department Current

Payroll System: Payroll for North America

**Payroll for North America**

Pay Group: ME1 340 Monthly Exempt Salary Holiday Schedule: PDHOL Holidays  
 Employee Type: S Salaried  
 Tax Location Code: OK STATE OK State FICA Status: Subject  
 GL Pay Type:  
 Account Code:

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab Refresh Update/Display Include History Correct History

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [MDC Job Data](#)

- Pay Group Field – valid value includes Monthly, Bi-Weekly, Military Salary, and various supplemental payrolls.
- Employee Type Field – valid value includes Salary or Hourly.
- Tax Location Code – valid value is OK STATE.
- Holiday Schedule Field – valid values are Paid Holiday or None.
- FICA Status Field: – valid value includes Subject or Exempt.



# SALARY TAB

PeopleSoft

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data [New Window](#)

Work Location Job Information Payroll Salary Plan Compensation MDC Job Data

100307,Employee Employee EmplID: 100307 Empl Rcd#: 0

**Salary Plan** First 1 of 16 Last

Effective Date: 11/01/2007 Effective Sequence: 0 Job Indicator: Primary Job  
 Action / Reason: Data Change Change Date: Current

**Salary Administration** CLAS Grade: Grade Entry Date 07/09/2007  
 Plan: Step: Step Entry Date

Review Rating: Review Date:  
 Rating Scale: Rating Model: Matrix:

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab Refresh Update/Display Include History Correct History

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [MDC Job Data](#)

- If the employee is in a Classified Position, the Grade Field, (= Pay Band) is determined by the Job Code.
- If the employee is in an Unclassified Position, the Grade Level Field will be empty.



### COMPENSATION TAB

PeopleSoft

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data [New Window](#)

Work Location Job Information Payroll Salary Plan Compensation MDC Job Data

100307, Employee Employee EmplID: 100307 **Empl Rcd#: 0**

Compensation First 1 of 15 Last

Effective Date: 11/01/2007 Effective Sequence: 0 Job Indicator: Primary Job  
Action / Reason: Data Change Change Department

Compensation Rate: 2,643.500000 Frequency: M Monthly

Comparative Information

Change Amount:	0.000000	USD	Monthly	Compa-Ratio:	0.95
Change Percent:	0.000				

Pay Rates

Daily	122.007692	USD	Monthly	2,643.500000	USD
Weekly	610.038462	USD	Annual	31,722.000000	USD

Default Pay Components

Pay Components First 1 of 1 Last

Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Percent
1 NAANNL	0	Details	31,722.000000	USD	A	

Calculate Compensation

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab Refresh Update/Display Include History Correct History

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [MDC Job Data](#)

- Compensation Rate is entered as an Annual rate for salary employees, or an hourly rate for hourly employee.
- Click the arrow by Pay Rates to see other Pay rate which includes Daily, Weekly, Monthly and Annual.
- Use the arrows on the Compensation Title Bar to page through the Salary records.



### MDC JOB DATA TAB

PeopleSoft.

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data [New Window](#)

Work Location Job Information Payroll Salary Plan Compensation MDC Job Data

100915,Employee Employee EmplID: 100915 Empl Rcd#: 0

**State of Oklahoma Job Data** First 1 of 5 Last

Effective Date: 03/04/2007 Effective Sequence: 0 Job Indicator: Primary Job  
 Action / Reason: Data Change Change of Funding Source Current

Common Fields		Special Use Fields	
Division:	<input type="text" value="00"/>	Special Use 1:	<input type="text" value="45200439"/>
Worker's Comp Code:	<input type="text" value="8810"/>	Special Use 2:	<input type="text"/>
		Special Use 3:	<input type="text"/>
		Special Use Date:	<input type="text"/>

**Cost Center Information** View All First 1 of 1 Last

Cost Center 1	Cost Center 2	Cost Center 3	Cost Center 4	Cost Center Percent
1 00	91000			100.00

Remarks:

[Job Data](#) [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab Refresh Update/Display Include History Correct History

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [MDC Job Data](#)

- Division Field – is agency defined.
- Worker’s Comp Code Field – used for Worker’s Comp Reporting.
- Special Use Fields – Each Agency has a different reason for each field.
- Cost Center Fields are used by Agencies that require breakdown for the Budget.
- Remarks entered in the Remarks Field, will be printed on the Office of Personnel Management – OPM-14 Form.



### EMPLOYMENT INFORMATION LINK

PeopleSoft.

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data [New Window](#)

Employment Information

100140,Employee Employee EmpID: 100140 Emp Rcd#: 0

'Home/Host: Host [Time Reporter Data](#)

Business Title: Certified Public Accountant I

Work Phone:

Hire Date: 08/01/1989 Probation Date:

Termination Date: 10/14/2005 Last Date Worked: 10/14/2005

Rehire Date: 05/01/2005 Expected Return Date: 09/25/2012

	Years	Months	Days
Company Seniority Date: 06/16/2004	1	3	28
Service Date: 06/16/1992	13	3	28

Date Last Increase: 07/01/2005

Last Verification Date: Longevity Date: 06/16/1992

USA

[Job Data](#) Employment Data [Earnings Distribution](#) [Benefits Program Participation](#)

Save Return to Search Refresh Update/Display Include History Correct History

- If Applicable, Probation Date and Longevity Date should be entered for new hires.
- **Terminology**
  - Hire Date = State EOD (entered on duty)
  - Termination Date = First Day NOT Worked
  - Company Seniority Date = Agency EOD
  - Service Date = Leave Accrual Start Date
  - Probation Date = Last Day of Probation or Trial Period
  - Expected Return Date = Reinstatement Eligibility Date
  - Longevity Date = Longevity Date



## TIME AND LABOR LINK

PeopleSoft.

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data [New Window](#)

Time and Labor Data

100307,Employee ID: 100307 Empl Rcd Nbr: 0  
Employee

**Time Reporter Data** View All First 1 of 4 Last

Effective Date: 07/09/2007 Time Reporter Status: Active Send Time to Payroll + -

Time Reporter Type Time Reporting Template  
 Elapsed REGULAR Regular  
 Punch

Commitment Accounting Flags  
 For Taskgroup  
 For Department

Time Period ID: [ ]  
Workgroup: 34000-01 Department of Health  
Taskgroup: PSNONTASK Non Task Taskgroup  
Task Profile ID: [ ]  
TCD Group: [ ]  
Restriction Profile ID: [ ]  
Rule Element 1: [ ]  
Rule Element 2: [ ]  
Rule Element 3: [ ]  
Rule Element 4: [ ]  
Rule Element 5: [ ]  
Time Zone: CST Central Time

OK Cancel

- View different Effective Dates using the arrows.
- Work Group Field consists of Agency Number plus 2 Zeros and '01' for Regular Salary Employee or '02' for Temporary Employee.
- Task Group is always "PSNONTASK".
- Click **OK** or the **Cancel** button at the bottom the Screen and the application returns you to the Employment Data Page.



### JOB EARNINGS DISTRIBUTION LINK

PeopleSoft

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data [New Window](#)

Job Earnings Distribution

100307,Employee Employee **EmpID:** 100307 **Empl Rcd#:** 0

**Earnings Distribution Type** First 1 of 15 Last

**Effective Date:** 11/01/2007 **Effective Sequence:** 0 **Job Indicator:** Primary Job  
**Action / Reason:** Data Change Change Department Current

**Standard Hours:** 40.00 **Work Period:** W Weekly  
**Compensation Rate:** 2,643.500000 **Comp Freq:** M Monthly

'Earnings Distribution Type: By Percent

**Job Earnings Distribution** First 1-3 of 3 Last

Position	Unit	Department	Job Code	Shift	'Earn Code	
	34000			N/A	REG	Regular
<b>GL Pay Type</b>	<b>'Account Code</b>	<b>Compensation Rate</b>	<b>Std Hrs</b>	<b>Distrb %</b>		
	000077982			20.000		
	34000			N/A	REG	Regular
<b>GL Pay Type</b>	<b>'Account Code</b>	<b>Compensation Rate</b>	<b>Std Hrs</b>	<b>Distrb %</b>		
	000077994			55.000		
	34000	0240040		N/A	REG	Regular
<b>GL Pay Type</b>	<b>'Account Code</b>	<b>Compensation Rate</b>	<b>Std Hrs</b>	<b>Distrb %</b>		
	000077980			25.000		

[Job Data](#) [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Save Return to Search Refresh Update/Display Include History Correct History

- Account Code Field = HR Account Code which consist of Class Field, Budget Reference and Department.
- Distribution Percent Field(s) – MUST total up to 100%, whether one funding row or multiple rows.



### BENEFIT PROGRAM PARTICIPATION LINK

The screenshot shows the PeopleSoft interface for 'Benefit Program Participation'. At the top, the breadcrumb trail is 'Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data'. The main area displays details for employee 100307. Key fields include 'Benefit Record Number' (0), 'EmplID: 100307', and 'Empl Rcd#: 0'. Below this is the 'Benefit Status' section with 'Effective Date: 11/01/2007' and 'Action / Reason: Data Change'. The 'Benefit Program Participation' table shows one record with 'Effective Date: 07/09/2007' and 'Benefit Program: REG Regular Classified Employees'. Red arrows and circles highlight the 'Benefit Record Number', 'Empl Rcd#', and the table header area.

- Employee Benefits Council, (EBC), data will be loaded on the employee records nightly for all employees entitled to the Regular Benefits Program.
- The Employee Record Numbers MUST match with Benefits Record Number = (0).
- Note the Benefit Program Participation is Effective Dated. Changes to the Benefit Plan will require a change in the Effective Date.



## **INQUIRY DATA INFORMATION**

### **POSITION, JOB AND BUDGET SUMMARY TABS**

- Position Data Summary – General Tab
- Position Data Summary – Work Location Tab
- Position Data Summary – Payroll Information Tab
- Position Data – Job Information Tab (Unclassified Cite Code)
- Position Data – Specific Information Tab
- Position Budget Status Tab
- Job Summary – General Tab
- Job Summary – Job Information Tab
- Job Summary – Work Location Tab
- Job Summary – Compensation Tab
- Report Screen Shot



## POSITION DATA SUMMARY – GENERAL TAB

PEOPLE Soft

Home Help Sign Out

Home > Develop Workforce > Manage Positions > Inquire > Position Data Summary [New Window](#)

Position Data Summary

Position Number: 54800012 Admin Programs Officer

**Position Data** First 1-2 of 2 Last

Effective Date	Action Reason	Status	Status Date	Max Head Count	Budgeted
08/25/2004	Level Chan	Approved	05/04/2004	1	Y
01/01/1951		Approved	05/04/2004	1	Y

[Return to Search](#)

- Action Reason Codes for the change in positions include: Allocation, Direct Reclassification, Position Inactivated, Level Change, New Position, Position Creation for Payroll Maintenance, Position Status Change, Position Data Update, and Transfer.



### POSITION DATA SUMMARY – WORK LOCATION TAB

PEOPLE Soft

Home Help Sign Out

Home > Develop Workforce > Manage Positions > Inquire > Position Data Summary [New Window](#)

Position Data Summary

Position Number: 47700002 Secretary

Position Data First 2 Last

Effective Date	Reports To	Unit	Location	Jobcode	Dept
12/11/1992		47700	477		Enforcemen
01/01/1951		47700	477		Enforcemen

[Return to Search](#)

- The Location Field – identifies the different locations within the agency a position has resided.
- The Department Field – identifies the different departments a position has been located.



### POSITION DATA SUMMARY – PAYROLL INFO TAB

PEOPLE Soft

Home Help Sign Out

Home > Develop Workforce > Manage Positions > Inquire > Position Data Summary [New Window](#)

Position Data Summary

Position Number: 47700002 Secretary

Position Data					
Effective Date	Reg/Temp	Full/Part	Default Hr	Work Period	Shift
12/11/1992	Regular	Full-Time	40.00	Weekly	N/A
01/01/1951	Regular	Full-Time	40.00	Weekly	N/A

Return to Search

- The Payroll Info Tab provides a summary of whether a position is Regular or Temporary, Full or Part Time as well as providing the Work Period designation.
- Note that each entry is Effective Dated.



### POSITION DATA – JOB INFORMATION TAB (UNCLASSIFIED CITE CODE)

PeopleSoft

Home Worklist Help Sign Out

Home > Develop Workforce > Manage Positions > Use > Position Data [New Window](#)

Description Work Location Job Information **Specific Information** Budget and Incumbents

**Position Number:** 34000081 Program Grant Consultant  
**Headcount Status:** Filled **Current Head Count:** 1 out of 1

View All First 1 of 1 Last

**Effective Date:** 02/12/1993 **Status:** Active  
**Classified Indc:** Unclassifd **Job Family:**  
**Job Code:** 6854 Program Grant Consultant **Manager Level:** All Other Positions  
**Reg/Temp:** Regular  
**Full/Part Time:** Full-Time  
**Regular Shift:** Not Applicable  
**Union Code:**

Defaults

<b>Salary Plan:</b> UNCL	<b>Grade:</b>	<b>Step:</b>
<b>Standard Hours:</b> 40.00	<b>Work Period:</b> W Weekly	
	Mon Tue Wed Thu Fri Sat Sun	

**SetID:** 34000 **Unclassified Cite Code:** F004 FEDERAL OR OTHER GRANT FUNDS

Save Return to Search Next in List Previous in List Previous tab Next tab Add Update/Display Include History Correct History

[Description](#) | [Work Location](#) | [Job Information](#) | [Specific Information](#) | [Budget and Incumbents](#)

- The Unclassified Cite Code Field auto-populates the record of any employee assigned to an unclassified position.



### POSITION DATA – SPECIFIC INFORMATION TAB

PeopleSoft

Home Worklist Help Sign Out

Home > Develop Workforce > Manage Positions > Use > Position Data [New Window](#)

Description Work Location Job Information **Specific Information** Budget and Incumbents

Position Number: 34000852 Administrative Assistant  
 Headcount Status: Filled Current Head Count: 1 out of 1

View All First 1 of 2 Last

Effective Date: 02/12/1993 Status: Active

Max Head Count: 1  Update Incumbents  
 Mail Drop ID:  Budgeted Position  
 Work Phone:  Confidential Position  
 Health Certificate:  Job Sharing Permitted  
 Signature Authority:

Education and Government

Position Pool ID:  
 Pre-Encumbrance Indicator: Immediate Calc Group (Flex Service):  
 Encumber Salary Option: Salary Step Academic Rank:  
 FTE: 1.00  Adds to FTE Actual Count

Save Return to Search Previous tab Next tab Add Update/Display Include History Correct History

[Description](#) | [Work Location](#) | [Job Information](#) | [Specific Information](#) | [Budget and Incumbents](#)

- The Drop Down Box on Education and Government Title Bar indicates whether the position counts toward the agency’s FTE limits.



### POSITION BUDGET STATUS TAB

PeopleSoft

Home Worklist Help Sign Out

Home > Develop Workforce > Manage Positions > Inquire > Position Budget Status [New Window](#)

Position Budget Status

**Position Number:** 34000852 Administrative Assistant  
**Position Status:** Active Approved **Status Date:** 09/12/2006  **Budgeted**  
**Business Unit:** 34000 Department of Health  
**Job Code:** E17B Administrative Assistant  
**Department:** 5555001 Health Resources Dev Serv

**Current Budget**

<b>Max Head Count:</b>	1			
<b>Actual Head Count:</b>	1	<b>Total Budget FTE:</b>		<b>Total Budget Amount:</b> 31,722.000000
<b>Current Budget Head Count:</b>	0	<b>Current Budget FTE:</b>		<b>Current Budget Amount:</b>
<b>Head Count Variance:</b>	1	<b>FTE Variance:</b>		<b>Amount Variance:</b> 31,722.00

**Current Incumbents** First 1 of 1 Last

EmplID	Name	Employee Status	Position Entry Date				
100307	100307,Employee	Active	07/09/2007				
Annual Rate	Full/Part Time	Reg/Temp	Standard Hours	FTE	Sal Plan	Grade	Step
31,722.000	Components Full-Time	Regular	40.00		CLAS	I	

[Return to Search](#)

- The Position Budget Status Tab shows the current incumbent information.
- The links provided on the Total Budget Amount and Amount Variance fields can provide additional detailed information.



### JOB SUMMARY – GENERAL TAB

PeopleSoft.

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary [New Window](#)

Job Summary

100307,Employee Employee **EmplID: 100307 Empl Rcd#: 0**

**Job Information** View All First 1 1-7 of 15 Last

General Job Information Work Location Compensation

Eff Date	Sequence	Action	Action Reason
11/01/2007	0	Data Change	Change Department
07/09/2007	2	Rehire	Transfer/Promotion InterAgency
07/09/2007	1	Data Change	OPM Interagency Activity
07/09/2007	0	Termination	Transferred Out
07/01/2007	0	Pay Rate Change	Equity Adjustment
06/01/2007	0	Data Change	Change in Location
11/01/2006	0	Data Change	Change Division

[Return to Search](#)

- The Job Summary – General Tab reflects in a one page format the following elements of a position: Effective date for each HR action(s), Sequence, Kind of action taken, and Reason.



### JOB SUMMARY – JOB INFORMATION TAB

PeopleSoft

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary [New Window](#)

Job Summary

100307,Employee Employee **EmpID:** 100307 **Emp Rcd#:** 0

**Job Information** [View All](#) First 1-7 of 15 Last

Eff Date	Sequence	Job Code	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
11/01/2007	0	E17B	Salaried	Active	Full-Time	Regular	40.00	Weekly
07/09/2007	2	E17B	Salaried	Active	Full-Time	Regular	40.00	Weekly
07/09/2007	1	E17B	Salaried	Terminated	Full-Time	Regular	40.00	Weekly
07/09/2007	0	E24C	Salaried	Terminated	Full-Time	Regular	40.00	Weekly
07/01/2007	0	E24C	Salaried	Active	Full-Time	Regular	40.00	Weekly
06/01/2007	0	E24C	Salaried	Active	Full-Time	Regular	40.00	Weekly
11/01/2006	0	E24C	Salaried	Active	Full-Time	Regular	40.00	Weekly

[Return to Search](#)

- The Job Summary – Job Information Tab reflects in a one page format the following elements of a position: Effective date, Sequence, Job code, Employee Type, Employee status, Full or Part time, Regular or Temporary, Standard hours and Work period



### JOB SUMMARY – WORK LOCATION TAB

PeopleSoft.

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary [New Window](#)

Job Summary

100307,Employee Employee **EmplID:** 100307 **Empl Rcd#:** 0

**Job Information** [View All](#) First 1-7 of 15 Last

Eff Date	Sequence	Position	Company	DeptID	Sal Plan	Grade	Pay Group	Frequency
11/01/2007	0		340	Consumer H	CLAS	I	ME1	Monthly
07/09/2007	2		340	Health Res	CLAS	I	ME1	Monthly
07/09/2007	1		340	Health Res	CLAS	I	ME1	Monthly
07/09/2007	0	Secretary	400	Community	CLAS	H	MN1	Monthly
07/01/2007	0	Secretary	400	Community	CLAS	H	MN1	Monthly
06/01/2007	0	Secretary	400	Community	CLAS	H	MN1	Monthly
11/01/2006	0	Secretary	400	Community	CLAS	H	MN1	Monthly

[Return to Search](#)

- The Job Summary – Work Location Tab reflects in a one page format the following elements of a position: Effective date, Sequence, Position Name, Company, which equals (Agency), Department, Salary Plan, Grade, Pay Group and Pay Frequency.



### JOB SUMMARY – COMPENSATION TAB

PeopleSoft.

Home Worklist Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary [New Window](#)

Job Summary

100307,Employee Employee EmpID: 100307 Empl Rcd#: 0

**Job Information** View All First 1-7 of 15 Last

General Job Information Work Location Compensation

Eff Date	Sequence	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
11/01/2007	0	\$31,722.000	\$2,643.500	\$122.008	\$15.250962	USD	0.000	<a href="#">Components</a>
07/09/2007	2	\$31,722.000	\$2,643.500	\$122.008	\$15.250962	USD	21.021	<a href="#">Components</a>
07/09/2007	1	\$26,211.960	\$2,184.330	\$100.815	\$12.601904	USD	0.000	<a href="#">Components</a>
07/09/2007	0	\$26,211.960	\$2,184.330	\$100.815	\$12.601904	USD	0.000	<a href="#">Components</a>
07/01/2007	0	\$26,211.960	\$2,184.330	\$100.815	\$12.601904	USD	8.261	<a href="#">Components</a>
06/01/2007	0	\$24,211.908	\$2,017.659	\$93.123	\$11.640340	USD	0.000	<a href="#">Components</a>
11/01/2006	0	\$24,211.908	\$2,017.659	\$93.123	\$11.640340	USD	0.000	<a href="#">Components</a>

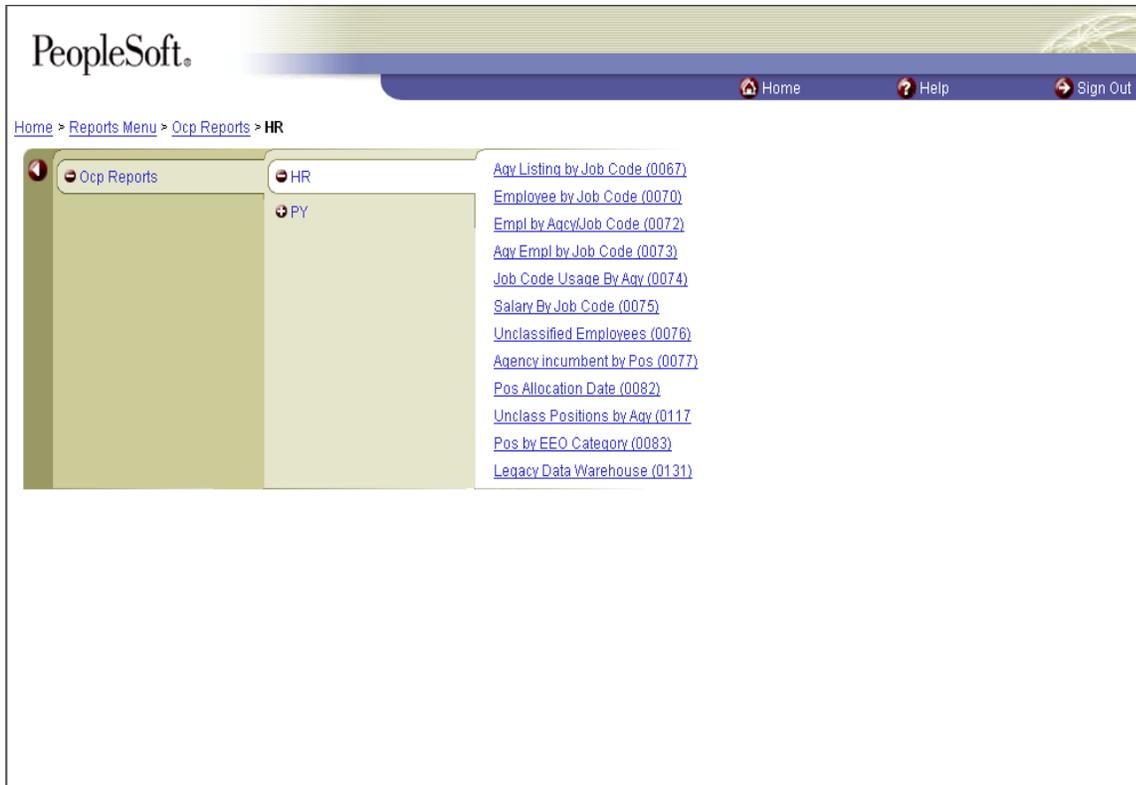
[Return to Search](#)

- The Job Summary – Compensation Tab reflects in a one page format the following elements of a position: Effective Date, Sequence, Annual compensation rate, Monthly compensation rate, Daily rate, Hourly rate, Currency Type, and the Change percentage.
- The [Components](#) Link provides additional detail.



# RUN HR REPORTS

## STEP 1 – SELECT REPORT



Navigation Path: Home > Reports Menu > Ocp Reports > HR

Over 30 HR Reports and or Queries are available including: Indented Position Report, Position Status, Exception/Override Report, Vacant Positions by Agency, Active/Inactive Positions, Employee Listings, Years of Service, Employee Birthdates, and Employee Job Code.

Click on the report link.



## STEP 2 – SET UP RUN CONTROL ID

The screenshot shows the PeopleSoft interface for "Employee by Job Code (0070)". The page title is "Employee by Job Code (0070)". Below the title, there is a section titled "Find an Existing Value". This section contains a text input field labeled "Run Control ID:". Below the input field, there is a checkbox labeled "Case Sensitive". To the right of the checkbox, there are two buttons: "Search" and "Advanced Search". Below the "Search" button, there is a link labeled "Add a New Value". The top of the page features the PeopleSoft logo and navigation links for Home, Help, and Sign Out. The breadcrumb trail is: Home > Reports Menu > Occ Reports > HR > Employee by Job Code (0070). A "New Window" link is also present.

Click the Search button.



## STEP 3 – SELECT RUN CONTROL ID

PeopleSoft.

Home Help Sign Out

Home > Reports Menu > Occ Reports > HR > Employee by Job Code (0070) [New Window](#)

Employee by Job Code (0070)

### Find an Existing Value

Run Control ID:

Case Sensitive

[Search](#) [Advanced Search](#)

[Add a New Value](#)

### Search Results

View All First 1-2 of 2 Last

Run Control ID	Language Code
<a href="#">ETERPT</a>	English
<a href="#">REPORTS</a>	English

Select a 'Run Control ID'.

A Run Control is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create (and save) a run control with those settings.



PeopleSoft.

Home Help Sign Out

Home > Reports Menu > Ocp Reports > HR > Employee by Job Code (0070) [New Window](#)

Run Ocphr0070

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

Report Parameters

'Beginning Jobcode: 0901

'Ending Jobcode: 0903

'Beginning Company: 090

'Ending Company: 090

Save Return to Search Next in List Previous in List Add Update/Display

Enter the appropriate parameters and click the **Run** button.



PeopleSoft.

Home Help Sign Out

Home > Reports Menu > Ocp Reports > HR > Employee by Job Code (0070) [New Window](#)

**Process Scheduler Request**

User ID: PAYTEST30 Run Control ID: REPORTS

Server Name: PSNT Run Date: 03/26/2008  
Recurrence: Recurrence Run Time: 9:53:49AM  
Time Zone: Reset to Current Date/Time

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	OCHR0070	OCHR0070	Crystal	Web	PDF

OK Cancel

If the Process Type is Crystal, go to Server Name and select PSNT.

Go to Format and select PDF and click **OK**.



## STEP 4 – SELECT PROCESS MONITOR

The screenshot shows the PeopleSoft interface for running a report. At the top left is the PeopleSoft logo. A navigation bar contains 'Home', 'Help', and 'Sign Out' links. Below this is a breadcrumb trail: 'Home > Reports Menu > Ocp Reports > HR > Employee by Job Code (0070)'. A 'New Window' link is on the right. The main area shows 'Run Ocp0070' and 'Run Control ID: REPORTS'. There are three links: 'Report Manager', 'Process Monitor', and 'Run'. The 'Process Monitor' link is highlighted. To the right, it says 'Process Instance:649415'. A 'Report Parameters' box contains four input fields: 'Beginning Jobcode: 0901', 'Ending Jobcode: 0903', 'Beginning Company: 090', and 'Ending Company: 090'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Add', and 'Update/Display'.

Click the [Process Monitor](#) link.



PeopleSoft.

Home Help Sign Out

Home > PeopleTools > Process Monitor > Inquire > Process Requests [New Window](#)

Process List **Server List**

View Process Request For

UserID: PAYTEST30 Process Type: Last: 1 Days Refresh

Server Name: Instance: to

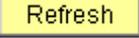
View Job Items  Save On Refresh

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
649415	Crystal	OCHR0070	PAYTEST30	03/26/2008 9:53:49AM CST	Success	<a href="#">Details</a>

[Go back to Employee by Job Code \(0070\)](#)

Save

[Process List](#) | [Server List](#)

The Process Monitor shows the progress of the process. Click the  button repeatedly until Run Status indicates Success.

Click the [Details](#) link to view the report.



## STEP 5 – SELECT VIEW LOG/TRACE

PeopleSoft.

Home Help Sign Out

Home > PeopleTools > Process Monitor > Inquire > Process Requests [New Window](#)

### Process Detail

Process	
<b>Instance:</b> 649415	<b>Type:</b> Crystal
<b>Name:</b> OCHR0070	<b>Description:</b> OCHR0070

Run	Update Process
<b>Run Control ID:</b> REPORTS	<input type="radio"/> Hold Request
<b>Location:</b> Server	<input type="radio"/> Queue Request
<b>Server:</b> PSNT	<input type="radio"/> Cancel Request
<b>Recurrence:</b>	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
<b>Request Created On:</b> 03/26/2008 9:56:02AM CST	<a href="#">Parameters</a> Transfer
<b>Run Anytime After:</b> 03/26/2008 9:53:49AM CST	<a href="#">Message Log</a>
<b>Began Process At:</b> 03/26/2008 9:56:08AM CST	Batch Timings
<b>Ended Process At:</b> 03/26/2008 9:56:56AM CST	<a href="#">View Log/Trace</a>

OK Cancel

Click the [View Log/Trace](#) link.



## STEP 6 – CHOOSE REPORT

✕

**Report/Log Viewer** ✕

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**Instance:** 649415      **Type:** Crystal  
**Name:** OCHR0070      **Run Cntl ID:** REPORTS  
**Status:** Success      **Submitted By:** PAYTEST30  
**Server:** PSNT      **Recurrence:**

---

[OCHR0070](#)

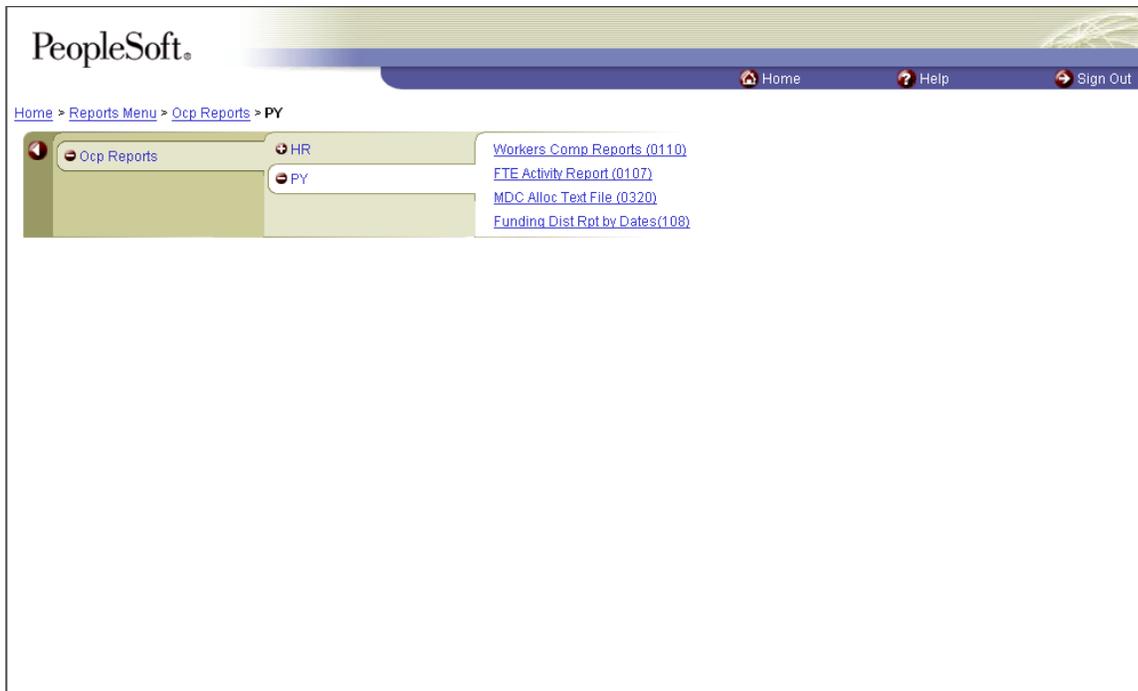
Name	File Size	File Creation Date
<a href="#">Message Log</a>	0 bytes	Wed Mar 26 10:00:59 2008
<a href="#">OCHR0070_649415.PDF</a>	13843 bytes	Wed Mar 26 10:01:27 2008

Choose the link with the [PDF](#) or [TXT](#) extension.



# RUN PAYROLL REPORTS

## STEP 1 – SELECT REPORT



Navigation Path: Home > Reports Menu > Ocp Reports > PY

Five (5) Payroll Reports will be available: Budget Check, Funding Distribution, Worker's Comp Report, FTE Activity Report and MDC Allocation Text File.

Click the report link.



## STEP 2 – SELECT RUN CONTROL ID

A screenshot of the PeopleSoft web interface. The page title is 'MDC Alloc Text File (0320)'. Below the title is a search section titled 'Find an Existing Value'. It contains a text input field for 'Run Control ID:', a 'Case Sensitive' checkbox, and 'Search' and 'Advanced Search' buttons. Below this is an 'Add a New Value' link. The 'Search Results' section shows two results: 'FTRPT English' and 'REPORTS English'. The 'REPORTS English' result is highlighted with a grey background.

PeopleSoft.

Home Help Sign Out

Home > Reports Menu > Ocp Reports > PY > MDC Alloc Text File (0320) [New Window](#)

MDC Alloc Text File (0320)

**Find an Existing Value**

Run Control ID:

Case Sensitive

[Search](#) [Advanced Search](#)

[Add a New Value](#)

**Search Results**

View All First 1-2 of 2 Last

Run Control ID	Language Code
<a href="#">FTRPT</a>	English
<a href="#">REPORTS</a>	English

Select a 'Run Control ID'.



## STEP 3 – ENTER PARAMETERS

A screenshot of the PeopleSoft web interface. The top navigation bar includes "Home", "Help", and "Sign Out" links. The breadcrumb trail reads "Home > Reports Menu > Ocp Reports > PY > MDC Alloc Text File (0320)". Below this, there is a search box containing "Run Ocphr0320". The "Run Control ID:" is set to "REPORTS". There are three buttons: "Report Manager", "Process Monitor", and a highlighted "Run" button. The form includes several input fields: "Company:" with the value "090", "From Date:" with the value "03/01/2008", "To Date:" with the value "03/31/2008", "Division:" (labeled "OPTIONAL FIELD"), and "Employee ID:" (labeled "OPTIONAL FIELD"). At the bottom, there are several action buttons: "Save", "Return to Search", "Next in List", "Previous in List", "Add", and "Update/Display".

Enter the appropriate parameters and click the  button.



PeopleSoft.

Home Help Sign Out

Home > Reports Menu > Ocp Reports > PY > MDC Alloc Text File (0320) [New Window](#)

**Process Scheduler Request**

User ID: PAYTEST30 Run Control ID: REPORTS

Server Name: PSUNX Run Date: 03/26/2008  
Recurrence: Run Time: 10:37:21AM  
Time Zone: [Reset to Current Date/Time](#)

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	MDC Allocations Txt Fil (0320)	OCP320HR	PSJob	(None)	(None)
<input type="checkbox"/>	MDC Allocations Txt Fil (0320)	OCPHR320	SQR Process	Web	PDF

OK Cancel

If the Process Type is an SQR Process, go to Server Name Field and select PSUNX with the drop down menu.

In the Format Field select PDF with the drop down menu and click **OK**.



## STEP 4 – SELECT PROCESS MONITOR

PeopleSoft.

Home Help Sign Out

Home > Reports Menu > Ocp Reports > PY > MDC Alloc Text File (0320) [New Window](#)

Run Ocp0320

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

Process Instance: 649416,649417

\*Company: 090

\*From Date: 03/01/2008

\*To Date: 03/31/2008

Division: OPTIONAL FIELD

Employee ID: OPTIONAL FIELD

Save Return to Search Next in List Previous in List Add Update/Display

Click on the [Process Monitor](#) link.



PeopleSoft.

Home Help Sign Out

Home > PeopleTools > Process Monitor > Inquire > Process Requests [New Window](#)

Process List **Server List**

View Process Request For

UserID: PAYTEST30 Process Type: Process Name: Instance: to Run Status: Last: 1 Days Refresh

Server Name: Process Run Status: Save On Refresh

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
649416	PSJob	OCP320HR	PAYTEST30	03/26/2008 10:37:21AM CST	Success	<a href="#">Details</a>
649417 1	SQR Process	OCPHR320	PAYTEST30	03/26/2008 10:37:21AM CST	Success	<a href="#">Details</a>
649415	Crystal	OCHR0070	PAYTEST30	03/26/2008 9:53:49AM CST	Success	<a href="#">Details</a>

[Go back to MDC Alloc Text File \(0320\)](#)

Save

[Process List](#) | [Server List](#)

The Process Monitor shows the progress of the process. Click on the  button repeatedly until Run Status indicates Success.

Click on the [Details](#) link to view the report.



## STEP 5 – SELECT VIEW LOG/TRACE

[Home](#) > [PeopleTools](#) > [Process Monitor](#) > [Inquire](#) > **Process Requests** [New Window](#)

### Process Detail

Process	
<b>Instance:</b> 649417	<b>Type:</b> SQR Process
<b>Name:</b> OCPHR320	<b>Description:</b> MDC Allocations Txt Fil (0320)

Run	Update Process
<b>Run Control ID:</b> REPORTS	<input type="radio"/> Hold Request
<b>Location:</b> Server	<input type="radio"/> Queue Request
<b>Server:</b> PSNT	<input type="radio"/> Cancel Request
<b>Recurrence:</b>	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
<b>Request Created On:</b> 03/26/2008 10:38:38AM CST	<a href="#">Parameters</a> Transfer
<b>Run Anytime After:</b> 03/26/2008 10:37:21AM CST	<a href="#">Message Log</a>
<b>Began Process At:</b> 03/26/2008 10:38:45AM CST	Batch Timings
<b>Ended Process At:</b> 03/26/2008 10:39:00AM CST	<a href="#">View Log/Trace</a>

Click on the [View Log/Trace](#) link.



## STEP 6 – CHOOSE REPORT

✕ **Report/Log Viewer** ✕

---

**Instance:** 649417      **Type:** SQR Process  
**Name:** OCPHR320      **Run Cntl ID:** REPORTS  
**Status:** Success      **Submitted By:** PAYTEST30  
**Server:** PSNT      **Recurrence:**

---

[MDC Allocations Txt Fil \(0320\)](#)

Name	File Size	File Creation Date
<a href="#">Trace File</a>	308 bytes	Wed Mar 26 10:43:34 2008
<a href="#">OCP_320_HR649417.TXT</a>	277495 bytes	Wed Mar 26 10:43:36 2008
<a href="#">Message Log</a>	1435 bytes	Wed Mar 26 10:43:32 2008

Choose the link with the **PDF** or **TXT** extension.



# RUN QUERIES

## STEP 1 – LIST QUERIES

A screenshot of the PeopleSoft Query Manager interface. The top navigation bar includes "Home", "Worklist", "Help", and "Sign Out". The breadcrumb trail is "Home > PeopleTools > Query Manager > Use > Query Manager". The main content area is titled "Query Manager" and "Find an Existing Query". It features a search form with "Search by:" followed by a dropdown menu set to "Name", another dropdown menu set to "begins with", and a text input field containing "GO". A yellow "Search" button is positioned below the input field. A link for "Create New Query" is located below the search form.

Navigation Path: **Home > PeopleTools > Query Manager > Use > Query Manager**

Enter GO in the text box and click **Search**.



## STEP 2 – SELECT QUERY

PeopleSoft.

Home Help Sign Out

Home > PeopleTools > Query Manager > Use > Query Manager [New Window](#)

Query Manager

Find an Existing Query

Search by:

Search Results

Query		View 100	First	1-30 of 128	Last
GO_AGCY_EMPLOYEE_STATUS	Agcy Employee List-Status %%%	Public	<a href="#">Run</a>		
GO_AGCY_EMPL_LIST_DIV_	Agcy Employee List - Div - %%%	Public	<a href="#">Run</a>		
GO_AGCY_EMPL_LIST_DIV_D	Agcy Employee List - Div - %%%	Public	<a href="#">Run</a>		
GO_AGENCY_EMPLOYEE_LIST	All employees by Location	Public	<a href="#">Run</a>		
GO_AGENCY_EMPLOYEE_LIST_DATE	All employees by Location	Public	<a href="#">Run</a>		
GO_AGENCY_EMPLOYEE_LIST_LOC	All employees by Location%%%	Public	<a href="#">Run</a>		
GO_AGENCY_EMPLOYEE_LIST_STATUS	Agency Employee List - Status	Public	<a href="#">Run</a>		
GO_AGENCY_EMPLOYEE_STATUS_LOC	Agency Employee List-Status %%%	Public	<a href="#">Run</a>		
GO_AGENCY_EMP_LIST_STATUS_LEAVE	Agency Employee List - Leave	Public	<a href="#">Run</a>		
GO_BB_LEAVE_WITH_SERV_DATE_LOC	Leave with Service Date -LOC%%%	Public	<a href="#">Run</a>		
GO_BENEFIT_ALLOWANCE_BY_DATES	Benefit Allow. Paid Bt Dates	Public	<a href="#">Run</a>		
GO_BLANK_JOB_EARN_ACCT_CD_LOC	Blank Earns Dist by Agency%%%	Public	<a href="#">Run</a>		
GO_BLANK_JOB_EARN_ACCT_CODES	Blank Earns Dist by Agency	Public	<a href="#">Run</a>		
GO_BLANK_SERVICE_DATE	Blank Service Dt by Agency	Public	<a href="#">Run</a>		
GO_BLANK_SERVICE_DATE_LOC	Blank Service Dt by Agency%%%	Public	<a href="#">Run</a>		
GO_CHECKS_PAID	Checks paid for this payperiod	Public	<a href="#">Run</a>		
GO_CHECK_NETPAY_FOR_ZERO	Check for a Netpay of zero	Public	<a href="#">Run</a>		
GO_COMPENSATION	All Comp Rates by Agency	Public	<a href="#">Run</a>		
GO_COMPENSATION_LOC	All Comp Rates by Agency%%%	Public	<a href="#">Run</a>		
GO_COMPENSATION_SHIFT_DIFF	Shift Differential by Agency	Public	<a href="#">Run</a>		
GO_COMPENSATION_SHIFT_DIFF_LOC	Shift Differential by Agency%%%	Public	<a href="#">Run</a>		
GO_COMP_BY_DIVISION_LOC	Compensation by Division%%%	Public	<a href="#">Run</a>		
GO_COMP_BY_DIVISION_N_JOBCODE	Comp by Division and JobCode	Public	<a href="#">Run</a>		
GO_COMP_BY_DIV_JOBCODE_W_POSIT	Compensation by Div and JobCd	Public	<a href="#">Run</a>		
GO_COMP_BY_DIV_N_JOBCODE_LOC	Comp by Division / JobCode%%%	Public	<a href="#">Run</a>		
GO_COMP_DIV_JCODE_W_POSIT_LOC	Comp by Div and JobCd %%%	Public	<a href="#">Run</a>		
GO_COMP_RATE_DIFF_ETC	Shift Diff, Train Pay, On call	Public	<a href="#">Run</a>		
GO_COMP_RATE_DIFF_ETC_X	Shift Diff, Train Pay, On call	Public	<a href="#">Run</a>		
GO_CONV_DIV_LOC_MAIL_DROP	Div-Loc-Mail Drop- Active-SSN	Public	<a href="#">Run</a>		
GO_CONV_DIV_LOC_MAIL_DROP_ALL	Div-Loc-Mail Drop - All - SSN	Public	<a href="#">Run</a>		

Select a query and click on the [Run](#) link.



## STEP 3 – ENTER PARAMETERS – VIEW RESULTS

GO\_AGENCY\_EMPLOYEE\_LIST - All employees by Location

Agency:

Agency	Location	ID	R#	Name	SSN	Empl Status	Eff Date	Hire Date	Rehire Dt	Service Dt	Pay Grp	R/T	F/P	Type	Hrs/Wk	DeptID	Job Cd	Pos#	Name Eff Date
--------	----------	----	----	------	-----	-------------	----------	-----------	-----------	------------	---------	-----	-----	------	--------	--------	--------	------	---------------

Enter the appropriate parameters and click .



## STEP 4 – DOWNLOAD TO EXCEL SPREADSHEET

GO\_AGENCY\_EMPLOYEE\_LIST - All employees by Location

Agency:

[View Results](#)

Download results in : [Excel97 SpreadSheet](#) [CSV Text File](#) (89 kb)  
[Excel2K SpreadSheet](#)

[View All](#)

Agency	Location	ID	R#	Name	SSN	Empl Status	Eff Date	Hire Date	Rehire Dt	Service Dt	Pay Grp	R/T	F/P	Type
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The query results can be downloaded into an Excel spreadsheet.

Click either the [Excel97 SpreadSheet](#) or the [Excel2K SpreadSheet](#) links depending on which version of Excel is on your PC.



## HRMS RESOURCES

- CORE Website Link  
<http://www.ok.gov/OSF/CORE/HRMS/index.html>
- CORE Website – What you will find
  - Full Suite of HRMS Manuals
  - HRMS Module News
  - HRMS Query Toolkit – (Provides all the Reports and Queries available including a brief description and Navigation Path)
  - Training Schedule - (provided on the CORE Calendar)
- CD HR Navigation Tool (upon request)
- OSF Help Desk
  - E-Mail: [helpdesk@osf.ok.gov](mailto:helpdesk@osf.ok.gov)
  - Phone Numbers: 405 521.2444 or Toll Free 866 521.2444



# OSF NOTIFICATION GROUPS

To ensure the HRMS View Only Users receive all the current information about the HRMS System, the Office of State Finance will enroll you in a Notification Group called PeopleSoft HRMS (CORE).

## STEP 1 – SUBSCRIBE

To sign up for notifications from the OSF Website go to <http://ok.gov/OSF/>

**Select Notifications Sign Up**

1) Select the group(s) desired.

2) Enter your first

3) Enter last name.

4) Enter your e-mail address.

5) Re-enter your email address

6) Left Click Submit



A confirmation screen will automatically populate your email address used to sign up.

An email has been sent to you, so we can confirm your email address.  
Once you receive the email, enter the code from the email below.  
Email Address: drew.hall@osf.ok.gov  
Confirmation Code:

Once you receive the confirmation code in your email address, enter the code or copy/paste code from e-mail into the Confirmation Code Field. Left Click Confirm.

An email has been sent to you, so we can confirm your email address.  
Once you receive the email, enter the code from the email below.  
Email Address: drew.hall@osf.ok.gov  
Confirmation Code: c853bb22e3

You will receive a message that reads,  
“Your e-mail address has been subscribed! Thank you”.



## STEP 2 – UNSUBSCRIBE

Each time you receive an e-mail from OSF, the e-mail will afford you the opportunity to unsubscribe from that particular group. **Left Click** the link provided with each message sent.

This is the generalized body of a test email that has gone out. Normally there would be large volumes of non-descript jargon here that 1/2 of the recipients would read, the other would simply ditch in the round file. Additionally you could attach a file - which will boost readership, just far enough to see what you've attached.

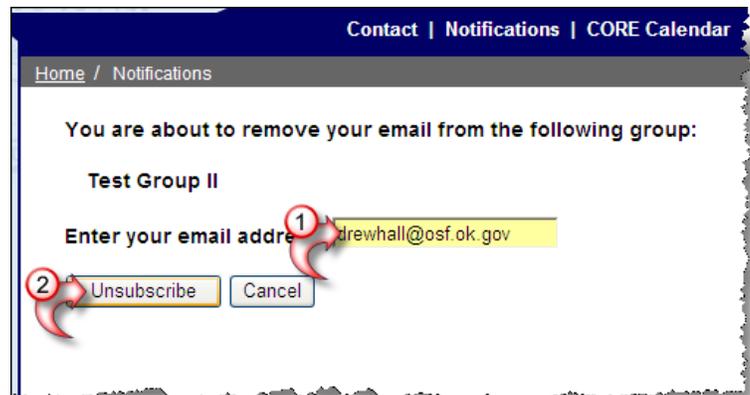
Dr. Seuss in a non-rhyming mood.

This message was sent from the GoGov Notification system.

To unsubscribe, visit <http://www.ok.gov/triton/modules/oknotify/unsubscribe.php?id=65,36>

The link will take you to the unsubscribe area for that account.

- 1) **Enter** your email address
- 2) **Left Click** Unsubscribe.



If the entered email address is in that group's database, the system will automatically unsubscribe the e-mail from the group account and provide the confirmation message as seen on the right.







## STEP 3 – MANUALLY UNSUBSCRIBE

In the event you would like to unsubscribe, but you do not have an email from that group, **Left Click** the Contact link at the top of the OSF web pages.

- 1) **Enter** your name
- 2) **Enter** e-mail address
- 3) **Select** “Unsubscribe from Notification Groups from Notification Groups
- 4) In the Message box, identify the group(s) you would like to unsubscribe.
- 5) **Left Click** Send Message

The screenshot shows the 'Contact Us' form on the OSF website. The form is titled 'Office of State Finance' and includes contact information such as 'Local: (405)521-2444', 'Toll Free: (866)521-2444', and 'Fax: (405)521-2871'. It also lists 'Office Hours' as '7:00AM to 5:30AM - Weekdays' and '24 Hour Emergency Support'. The 'Contact Us' section contains the following fields: 'Your Name:' (1), 'Your Email:' (2) with a note '(Email is required to receive a response.)', 'Regarding:' (3) with a dropdown menu showing options like 'Select an option', 'Create Help Desk Case', 'Job Opportunities', 'Questions Regarding OSF Website', and 'Unsubscribe from Notification Groups' (highlighted), and a 'Message:' text area (4). A 'Send Message' button (5) is located at the bottom right of the form.

**NOTE:** Alternately, you may e-mail the OSF Help Desk. [HelpDesk@Osf.Ok.Gov](mailto:HelpDesk@Osf.Ok.Gov)