Queries & Reports

PEOPLESoft
THE UNIVERSITY OF TEXAS AT EL PASO
Agenda

• Disable Pop-up blockers
• Position Funding Queries
• Employee Information Queries
• Budget Queries
• Reports
• Appendix A – Position Funding Query Example
• Appendix B – Expense Transactions Query Example
Disable Pop-up Blockers

Pop-up blockers must be disabled for PeopleSoft before running queries.

- Internet Explorer
- Firefox
- Chrome
1. Click gear 🔄 icon.
2. Select Internet Options.
3. Select Privacy Tab.
4. Unselect Turn on Pop-up Blocker box. (Check box should be blank.)
5. Click OK.
1. Click menu icon.
2. Select Options icon.
3. Select Content tab.
4. Unselect Block pop-up windows box. (Check box should be blank.)
5. Click OK.
1. Click Control icon.
2. Select Settings.
3. In Settings page, click Show advanced settings... hyperlink.
4. Scroll down to Privacy section and click Content settings... button.
5. Select Allow all sites to show pop-ups.
6. Click Done.
Available Funding Queries

Main Menu > HCM Reporting tools > Query > Query viewer

- View funding by Cost Center.
  - UTE_CA_FY_FUND_DATA_BY_CST_CTR
- View funding by Project.
  - UTE_CA_FY_FUND_DATA_BY_PROJECT
- View funding by Department.
  - UTE_CA_FY_FUNDING_DATA_DEPTS
- View funding by Position.
  - UTE_CA_FY_FUND_DATA_BY_POS
- Positions in department with no assigned funding data.
  - UTZ_CA_POSITIONS_NO_BUDGET

PeopleSoft Tips

- You need the HR Reviewer role to run these queries.
- To request access, fill out the Request Access to PeopleSoft form.
- HR Reviewers only have access to their respective departments.
Position Funding Query - by Cost Center

• **Query:** UTE_CA_FY_FUND_DATA_BY_CST_CTR

• **Description:**
  – Search **by cost center** to view funding data (appointment download) and HR assignment information for positions in your department.

• **Prerequisites:**
  – Need to know your cost center.

• **Criteria:**
  – Enter **UTEP1** for SetID.
  – Enter the **Cost Center**.

• **Key fields:**
  – Name, Effective Date, Funding End Date, Position, Job Code, Employee ID, Distribution %, Annual/Monthly Rate, Project/Cost Center, Budgeted Amount.

**PeopleSoft Tips**
• Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
Position Funding Query - by Project

• **Query:** UTE_CA_FY_FUND_DATA_BY_PROJECT

• **Description:**
  – Search by project ID to view position funding data (appointment download) and HR assignment information for positions in your department.

• **Prerequisites:**
  – Need to know your project 226 (grants) or EC or EP (Capital Projects) number.

• **Criteria:**
  – Enter **UTEP1** for SetID.
  – Enter your **Project ID**.

• **Key fields:**
  – Department ID, Position Number, Name, Distribution %, Funding End Date, Employee ID, Comp Rate, Annual/Monthly Rate, Effective Date, Job Code.

**For Example:**

**PeopleSoft Tips**
• Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
Position Funding Query - by Department

• **Query:** UTE_CA_FY_FUNDING_DATA_DEPTS

• **Description:**
  – Search by your department to view position funding data (appointment download) and HR assignment information for positions in your department.

• **Prerequisites:**
  – [Department codes](peoplesoft.utep.edu) file under the Resources tab on peoplesoft.utep.edu website.

• **Criteria:**
  – Enter department code for **Dept ID**.
  – Enter **UTEP1** for **SetID**.

• **Key fields:**
  – Name, Position, Budget, Effective Date, Job Code, Employee ID, Distribution %, Funding End Date, Annual/Monthly Rate, Project/Cost Center, HR Status.

**PeopleSoft Tips**
• Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
Position Funding Query - by Position

**Query:** UTE_CA_FY_FUND_DATA_BY_POS

**Description:**
- Search by **position** to view position funding data (appointment download) and HR assignment information for positions in your department.

**Prerequisites:**
- Position number can be found in the Current job page in PeopleSoft.

**Criteria:**
- Enter **UTEP1** for SetID.
- Enter eight digit **Position** number.

**Key fields:**
- Effective Date, Funding End Date, Position, Job Code, Employee ID, Distribution %, Annual/Monthly Rate, Project/Cost Center, Budgeted Amount.

**PeopleSoft Tips**
Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
Position Funding Query

• **Query:** UTZ_CA_POSITIONS_NO_BUDGET

• **Description:**
  – Positions in your department with no assigned funding data. These positions do not have their **Department Budget Table (DBT)** setup in PeopleSoft.

• **Criteria:**
  – Enter **UTEP1** for Set ID.

• **Key fields:**
  – Department ID, Position, Position Title, job Code, Employee Classification, FTE, Reports To, Status.

PeopleSoft Tips
• Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
Employee Information Queries

Main Menu > HCM Reporting Tools > Query > Query Viewer

- View employee leave balances, deductions, and accruals.
  - UTZ_HA_TIMEKEEPER

- View employee biographical and HR assignment information.
  - UTZ_HW_ACT_FAC_STAFF_PM5069B

- View employee positions with VISAs in your department.
  - UTZ_HW_ACTIVE_EMP_VISA_PM5064

PeopleSoft Tips

- You need the HR Reviewer role to run these queries.
- To request access, fill out the Request Access to PeopleSoft form.
- HR Reviewers only have access to their respective departments.
Leave Balances, Accruals & Deduction Query

• **Query:** UTZ_HA_TIMEKEEPER

• **Description:**
  – Search by pay period to view leave balances, accruals, and deductions for employees in your department.

• **Criteria:**
  – Select the **Calendar Group** (pay period) using .
  – Scroll down to **ELP** and pick the calendar group and view the information by **semi-monthly** calendar group.

• **Key Fields:**
  – Employee Name, ID, Calendar Group, Department ID.
  – **ENT** = Earned, **BAL** = Balance, **TAKE** = Taken.

**PeopleSoft Tips**
• You will be able to see the balances for all the UT schools. Select the options beginning with **ELP** Calendar group.
Biographical & HR Query

• **Query:** UTZ_HW_ACT_FAC_STAFF_PM5069B

• **Description:**
  – Biographical and HR assignment information for employees in your department.

• **Criteria:**
  – Enter **UTEP1** for SetID.

• **Key fields:**
  – Name, Address, Email, Phone, Job Title, Job End Date, Payroll Status, Employee Classification, Tenure Status, Department, Dept. ID, Last Start Date.

**PeopleSoft Tips**

• Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
Visa Expiration Query

- **Query:** UTZ_HW_ACTIVE_EMP_VISA_PM5064
- **Description:**
  - HR assignment information and VISA expiration information for employees in your department with VISAs.
- **Criteria:**
  - Enter **Start Date.** (Appointment Start Date)
  - Enter **VISA Type** or enter %.
  - Enter **UTEP1** for Set ID.
- **Key fields:**
  - Job Title, HR Status, Empl ID/Classification, Department, Appointment Time %, Visa Type, Visa Expiration Date, Appointment Start/End Date, Contract Begin/End Date.

**PeopleSoft Tips**
- Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
- Use the % sign to pull up all visa types.
Available Finance Queries

Main Menu > FMS Reporting Tools > Query > Query Viewer

- **View Budget Balances by Cost Center.**
  - UTE_BUDGET_BALANCES_CAO

- **View Budget Transactions by Cost Center.**
  - UTE_BUDGET_TRANSACTIONS_CAO

- **View Budget Balances for Grants.**
  - UTE_BUDGET_BALANCES_GRANTS

- **View Budget Transactions for Grants.**
  - UTE_BUDGET_TRANSACTIONS_GRANTS

- **View detailed Payroll Transactions.**
  - UTE_BUDGET_TRANSACTIONS_PAYROL

- **View detailed Grants Information.**
  - UTE_GM_AWARD_PROJECT_PROFILE

**PeopleSoft Tips**
- You need the **Budget Reviewer** role to run these queries.
- To request access, fill out the **Request Access to PeopleSoft** form.
Cost Center Budget Balances Query

- **Query:** UTE_BUDGET_BALANCES_CAO

- **Description:**
  - Budget balances for cost centers (staff salaries, wages, faculty/TA salaries, payroll related costs, operating expenses, expense transfers, balance forwards, etc.).

- **Prerequisites:**
  - Department codes file under the Resources tab on peoplesoft.utep.edu website.

- **Criteria:**
  - Enter Fiscal Year (YYYY).
  - Enter Period (MM).
  - Enter Department ID for From Dept and To Dept.

- **Key fields:**
  - Cost Center, Department, Account, Expense Budget, Expenses, Available Expense Budget, Revenues.

**PeopleSoft Tips**
- Accounting Period follows the fiscal year. January is not 01 but is equal to **05**.
Expense Transactions Query

• **Query:** UTE_BUDGET_TRANSACTIONS_CAO

• **Description:**
  – **Expense transactions** (vouchers, deposits, travel expenses, etc.) and amounts for cost centers and projects by month.

• **Prerequisites:**
  – [Department codes](peoplesoft.utep.edu) file under the Resources tab on peoplesoft.utep.edu website.

• **Criteria:**
  – Enter **Fiscal Year** (YYYY).
  – Enter **Acctg Period** (MM).
  – Enter **Department ID** for From Dept and To Dept.

• **Key fields:**
  – Cost Center, Project, Department, Account, Expenses, Amount, Journal ID, Voucher, Invoice Date, Vendor Name, Expense Report ID, Travel Auth ID.

**PeopleSoft Tip**
• Accounting Period follows the fiscal year. January is not 01 but is equal to 05.
Project Budget Balances Query

- **Query:** UTE_BUDGET_BALANCES_GRANTS

- **Description:**
  - Budget balances for projects (staff salaries, faculty salaries, student salaries, fringe benefits, other direct costs, travel, tuition & fees, construction, office services, mileage expenses, F&A, etc.).

- **Prerequisites:**
  - Department codes file under the Resources tab on peoplesoft.utep.edu website.

- **Criteria:**
  - Enter Project id (use % for all).
  - Enter Department ID.

- **Key fields:**
  - Department, Project, Account, Expense Budget, Expenses, Available Expense Budget.

For Example:

<table>
<thead>
<tr>
<th>Project id (use '% for all):</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept (use '% for all):</td>
<td>720200</td>
</tr>
</tbody>
</table>

**PeopleSoft Tips**

- Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
Project Expense Transactions

• **Query:** UTE_BUDGET_TRANSACTIIONS_GRANTS

• **Description:**
  – Expense transactions (vouchers, deposits, travel expenses, etc.) and amounts for projects and departments for year to date.

• **Prerequisites:**
  – Department codes file under the Resources tab on peoplesoft.utep.edu website.
  – Need to know your 226 (Grants) or EC or EP (Capital Projects) for Project ID number.

• **Criteria:**
  – Enter **Project ID**.
  – Enter **Department ID.** EX: 720200
  – Enter **Acctg Dates** for From and To.

• **Key fields:**
  – EN Encumb/ Ex- Expense, Amount, Journal ID, Voucher, Invoice Date, Vendor, Location, Vendor Name, PO NO, PO Date, Buyer.

**PeopleSoft Tips**
- Use the % sign to pull up all project expenses.
- Do not leave any fields blank.
Payroll Transactions Query

- **Query:** UTE_BUDGET_TRANSACTIONS_PAYROL

- **Description:**
  - Payroll transactions and amounts, reference data (employee name, EMPL IDs, journal numbers), and payment types (classified, A&P, student, overtime, etc.).

- **Prerequisites:**
  - Department codes file under the Resources tab on peoplesoft.utep.edu website.

- **Criteria:**
  - Enter Department ID.
  - Enter Cost Center (use % to view all).
  - Enter Project (use % to view all).
  - Enter Budget Year (YYYY).
  - Enter Budget Period (MM) From and To.

- **Key Fields:**
  - Cost Center, Account, Project, Budget Period, Reference (Names), Account Name.

**PeopleSoft Tips**
- Use the % sign to pull up all payroll transactions.
- Do not leave any field blank.
Grants Information Query

- **Query:** UTE_GM_AWARD_PROJECT_PROFILE
- **Description:**
  - Grants information such as award/proposal numbers, begin/end dates, PI names, sponsor IDs/names, Contracts & Grants administrator etc.
- **Prerequisites:**
  - Department codes file under the Resources tab on peoplesoft.utep.edu website.
- **Criteria:**
  - Enter Department ID for Dept ID or %.
  - Enter Project ID. EX: 226100853A
- **Key fields:**
  - Award Begin/End Date, Project Dept., Project Start/End Date, PI Name, Sponsor Name, Post Award Admin (C&G).

**PeopleSoft Tips**
- Use the % sign to pull up all project expenses.
- **Do not** leave any fields blank. Use % as the criteria.
Available Reports

- **Personnel Actions History – View HR changes.**
  - Main Menu > Workforce Administration > Job Information > Reports > Personnel Actions History

- **Time Card – View hours worked and leave for employees.**
  - Main Menu > UTZ Customizations > Time and Labor > Reports > UTZ Time Report

- **Emergency Contacts – View emergency contact information.**
  - Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contacts Report

- **Employee Birthdays – View birthday information.**
  - Main Menu > Workforce Administration > Personal Information > Biographical > Birthday Reports

**PeopleSoft Tips**
- Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
- The reports **expire** within 4 days. The **Expiration Date** is displayed on the report page.
PeopleSoft Tips
• A Run Control ID needs to be created only once.
• The Run Control ID cannot contain embedded characters or spaces.
• Search for the created Run Control ID under the Find an Existing Value tab.
**STEP 1: Create Report (continued)**

4. Select an action under **Actions**. (EX: Hire)
5. Click **Run**.
6. Select **PDF** for **Format**.
7. Click **OK**.

**PeopleSoft Tips**
- If you do not select an **Action**, the displayed results include all actions.
Reports – Personnel Actions History

- **STEP 2: Review and Open Report**
  8. Click Report Manager link.
  9. Select the Created On date. (Today)
  10. Click Refresh button until Report appears under the Reports section.
  11. Click latest report hyperlink.
  12. Select file ending with .PDF.

**PeopleSoft Tips**
- The Process Instance number is your unique report reference number.
- Report can also be found under the My Reports section of the home page.
Reports – Time Card

- **Navigation:** Main Menu > UTZ Customizations > Time and Labor > Reports > UTZ Time Report
- **Description:**
  - View hours worked and leave (vacation, sick, etc.) for employees in your department.

**STEP 1: Create Report**
1. Click on Add a New Value tab.
2. Create a Run Control ID with any name.
3. Click Add.

**PeopleSoft Tips**
- A Run Control ID needs to be created **only once**.
- The Run Control ID cannot contain embedded characters or spaces.
- Search for the created Run Control ID under the Find an Existing Value tab.
Reports – Time Card

STEP 1: Create Report (continued)
4. Enter Start and End Date for pay period.
5. Select a Pay Group.
6. Search by Employee ID or Group ID.
7. Click Run.
8. Select PDF under Format.
9. Click OK.

PeopleSoft Tips
All PayGroups option includes both Semi and Monthly pay periods.
- The Start date is the pay period begin date.
STEP 2: Review and Open Report

10. Click the Report Manager link.
11. Select the Created On date. (today)
12. Click the Refresh button until the Report appears under Reports section.
13. Click the latest report hyperlink.
14. Click file ending with .PDF.

PeopleSoft Tips
- The Process Instance number is your unique report reference number.
- Report can also be found under the My Reports section of the home page.
Reports – Emergency Contacts

• **Navigation:** Main Menu > Workforce Administrations > Personal Information > Personal Relationships > Emergency Contacts Reports

• **Description:**
  • View emergency contact information (name, telephone, and relationship) for employees in your department.

**STEP 1: Create Report**
1. Click on Add a New Value tab.
2. Create a Run Control ID with any name.
3. Click Add.
4. Click Run.

**PeopleSoft Tips**
• A Run Control ID needs to be created **only once**.
• The Run Control ID cannot contain embedded characters or spaces.
• Search for the created Run control ID under the Find an Existing Value tab.
Reports – Emergency Contacts

**STEP 1: Create Report (continued)**

5. Select **PDF** for Format.
6. Click OK.

**STEP 2: Review and Open Report**

7. Click **Report Manager** link.
8. Select the **Created On** date. (today)
9. Click **Refresh** button until Report appears in Reports section.
10. Click the latest **report** hyperlink.
11. Click on the **.PDF** file.
Reports – Employee Birthdays

- **Navigation:** Main Menu > Workforce Administration > Personal Information > Biographical > Birthday Reports

- **Description:**
  - View hours worked and leave (vacation, sick, etc.) for employees in your department.

- **STEP 1: Create Report**
  1. Click on Add a New Value tab.
  2. Create a Run Control ID with any name.
  3. Click Add.
  4. Click Run.

**PeopleSoft Tips**
- A Run Control ID needs to be created **only once**.
- The Run Control ID cannot contain embedded characters or spaces.
- Search for the created Run control ID under the Find an Existing Value tab.
Reports – Employee Birthdays

- **STEP 1: Create Report (continued)**
  5. Select **PDF** for Format.
  6. Click **OK**.

- **STEP 2: Review and Open Report**
  7. Click **Report Manager** link.
  8. Select the **Created On** date.
  9. Click **Refresh** button until Report appears in Reports section.
  10. Click the latest **report** hyperlink.
  11. Click on the **.PDF** file.
2. Under Documents, click the Queries and Reports tab.
3. The updated list is available under the Information Sheets section.

PeopleSoft Tip
• Visit this page often to view the latest list of Queries and Reports.
Appendix A – Position Funding Query by Department

Main Menu > HCM Reporting Tools > Query > Query Viewer
Appendix A – Position Funding Query by Department

1. Enter the query name in **begins with** field. Ex: **UTZ_CA_FY_FUNDING_DATA_DEPTS**.
2. Click **Search** button.
3. Click the **Excel** link to export.

**PeopleSoft Tip**

Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
Appendix A – Position Funding Query by Department

1. Enter Dept ID. EX: 720200
2. Enter UTEP1 for SetID.
3. Click View Results.
4. Click Enable Editing to customize.

PeopleSoft Tip
• Follow browser instructions to open the related document.
Appendix B – Expense Transactions Query

Main Menu > FMS Reporting Tools > Query > Query Viewer
Appendix B – Expense Transactions Query

1. Enter in **begins with** field, **UTE_BUDGET_TRANSACTION_CAO**.
2. Click **Search** button.
3. Click the **Excel** link to export.

**PeopleSoft Tips**
- Remember to select **allow pop-ups from this site** option in your browser to be able to download the file.
Appendix B – Expense Transactions Query

1. Enter **Fiscal Year** (YYYY).
2. Enter **Acctg Period** (MM).
3. Enter six digit Dept ID for **From Dept** and **To Dept**.
4. Click **View Results**.
5. Open file.
6. Click **Enable Editing** to customize.

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**PeopleSoft Tip**
- Accounting Period follows the fiscal year. January is not 01 but is equal to 05.
- Follow browser instructions to open the related document.
Thank You!