

# Colorado State University

## Human Resource Management System User Guide

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Unit 0: Introduction

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Unit 1: HRMS Basics

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Unit 2: Date Tracking

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Unit 3: Hiring a New Employee

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Unit 4: Electronic Approvals

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Unit 5: Maintaining Existing Employees

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Unit 6: Summer Session Appointments

---

Unit 7: Labor Scheduling

---

Unit 8: Time Entry and Timeclocks

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Unit 9: Performance Evaluation Module

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Unit 10: Leave Module

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**Unit 11: User Reports**

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Unit 12: Associates

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Appendix

# Unit 11: User Reports

This unit provides instruction on:

|                                      |              |
|--------------------------------------|--------------|
| <b>Queries</b> .....                 | <b>10.1</b>  |
| <b>Guided Queries</b> .....          | <b>10.1</b>  |
| <b>Folder Queries</b> .....          | <b>10.4</b>  |
| <b>Folder Tools</b> .....            | <b>10.7</b>  |
| <b>Saving a Folder Query</b> .....   | <b>10.9</b>  |
| <b>Folder Management</b> .....       | <b>10.10</b> |
| <b>Viewing History Reports</b> ..... | <b>10.11</b> |

## Queries

Lists, found under the View menu, can be used to pull specific employee-related data from Oracle. Some of the reports are pre-formatted and require you to input a few fields for customizing the list it produces. Two of the lists are more flexible and allow you query on additional fields. All data can be exported to Excel for sorting, editing, and printing.

### Guided Queries

These lists are preformatted and provide information in the following fields:

#### People by Assignment

|                   |                    |
|-------------------|--------------------|
| Full name         | Status             |
| Employee number   | Location           |
| Assignment number | Person type        |
| Organization      | Primary assignment |
| Job               | Grade              |

#### Assignments

|                 |                   |
|-----------------|-------------------|
| Full name       | Assignment number |
| Employee number | Salary            |
| Organization    |                   |

**Employees by Position**

Position number                      Employee number  
 Holder name

The instructions below explain how to run the People by Assignment report, but are similar enough to guide you through running any of the above reports.

- 1. From the Navigator screen, select View -> Lists. Select the report you would like to run. (People by Assignment is shown here.)**

| Full Name | Employee Number | Applicant Number | Contingent Worker Nu | Assignment |
|-----------|-----------------|------------------|----------------------|------------|
|           |                 |                  |                      |            |
|           |                 |                  |                      |            |
|           |                 |                  |                      |            |
|           |                 |                  |                      |            |

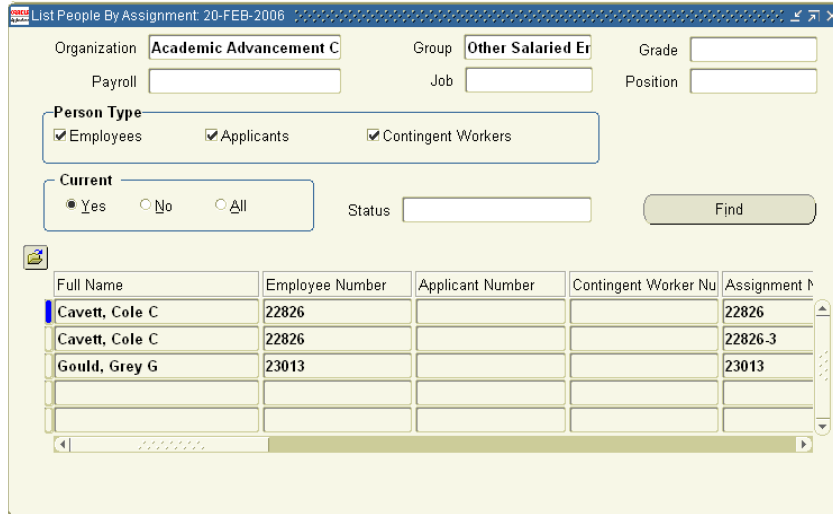
- 2. In the Organization field, type in part of your department’s name. Press Tab.**

**If you have access to Oracle at the College or Vice President level, you may either specify one department to query, or leave this field blank to query employees in your department plus all subordinate departments.**

- 3. Next are the Group, Grade, Payroll, Job, and Position fields. Using the LOVs, you may specify criteria in all, some, or none of these fields.**
- 4. To select employees having one particular assignment status, choose it from the LOV in the Status field.**

| Full Name | Employee Number | Applicant Number | Contingent Worker Nu | Assignment |
|-----------|-----------------|------------------|----------------------|------------|
|           |                 |                  |                      |            |
|           |                 |                  |                      |            |
|           |                 |                  |                      |            |

5. Click Find.

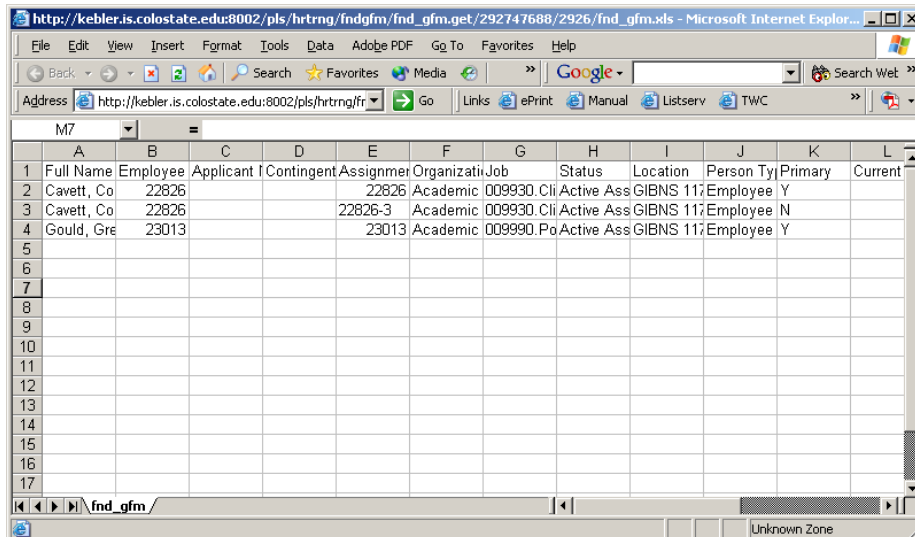


6. To move or resize columns in this folder, please refer to the section titled “Changing Folder Layout”.

To save this query so it can easily be run in the future, please refer to the section titled “Saving a Folder Query” later in this unit.

7. When the list of employees displays, you may export this data to Excel by clicking File -> Export.

8. You may save this data as a spreadsheet by clicking File -> Save in the window below.

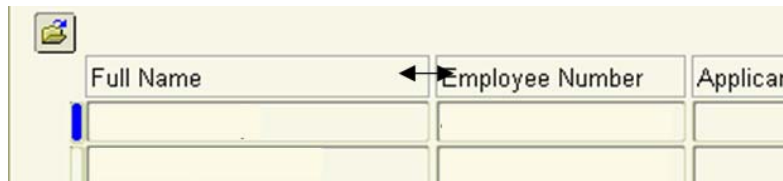


## Folder Tools

### Altering Folder Layout





**Rearranging Columns** - Click on the column heading and drag it to the new desired position.

**Resizing Columns** - Place your mouse cursor over the space between two column headings so that your cursor changes to a double-ended arrow. Click and drag the column boundary to resize it.



**Resorting Columns** - If the column you wish to sort is not one of the first three, rearrange the columns. Double-click one of the first three column headings to sort the data in ascending order. Double-click again to sort in descending order.

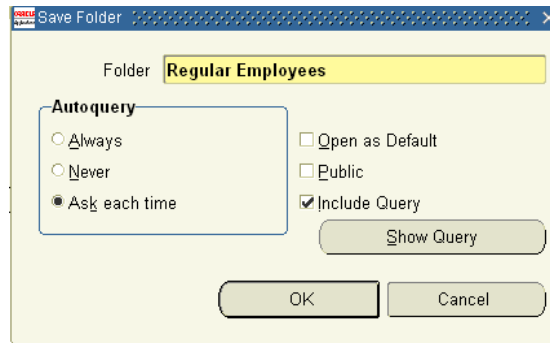
### Managing Folder Queries

|   |                                  |
|---|----------------------------------|
|  | Opens an existing folder query   |
|  | Saves the current folder query   |
|  | Creates a new folder query       |
|  | Deletes an existing folder query |

## Saving a Folder Query

You may save a query you've created so that it may be run again easily in the future. This section describes how to save the query as opposed to the data retrieved by the query. To save a query (as described in the section "Creating Custom Queries"), it must have retrieved at least one record.

1. To save the query criteria, click Folder -> Save As...
2. Enter a name for the query in the Folder field.



3. Select Always, Never, or Ask Each Time from the Autoquery box.

**Always** - the query runs automatically each time you open the folder

**Never** - the query will be saved with the folder but will not automatically run when you open the folder

**Ask Each Time** - when you open the folder, you will be prompted to decide if you want the query to run immediately

4. Check Open as Default if you want this query to open every time you open the folder. (A default query will not run unless you press Ctrl-F11 or unless you selected Always in the previous step.)
5. Check Public to allow other people with access to your organization to run this query.
6. Click OK.

## Viewing the Query Criteria

These steps allow you to see what criteria the query is based upon.

1. Select Folder -> View Query.
2. The Folder Query window displays. (An empty window indicates that there are no special search criteria and that the current folder definition retrieves all records for the folder entity.)

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## *Folder Management*

### Reverting to the Original Default Folder Definition for a Folder

You can revert to the original default folder definition by performing these steps:

1. When you are in a custom default folder definition, choose **Folder -> Save As**.
2. In the **Save As** window that appears, uncheck **Open as Default**.
3. Click **OK**.
4. Close and reopen this folder to display the original default folder definition.

### Opening Another Folder Definition

1. To load a predefined folder definition, click **Folder -> Open**, click the **Open Folder** button located in the upper left corner of the folder block, or click the **Open Folder** tool.
2. Select a folder definition from the list that appears and click **OK**.

### Saving Changes to a Folder Definition

1. To save layout or query changes made to the current folder definition, click **Folder -> Save**.

Or to save layout or query changes under a new name, click **Folder -> Save As**. If there are any pending changes to the information in the folder you will be prompted to save the changes or cancel the save.

2. If you choose **Save As**, complete the information requested in the **Save Folder** window that appears, and click **OK**.

### Deleting an Existing Folder Definition

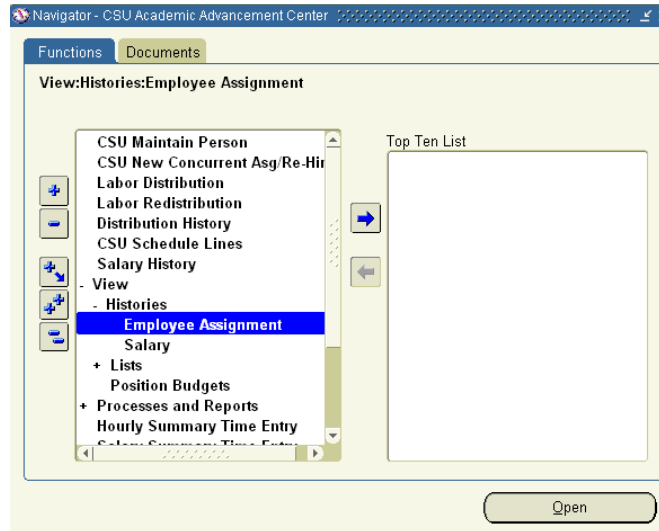
You can delete only the folders that you have created. If there are any pending changes to the information in the folder, you will be prompted to save the changes or cancel the delete.

1. Select **Folder -> Delete** (or click on the **Delete Folder** tool).
2. Select a **Folder** definition from the list that appears and click **OK** to delete the definition.

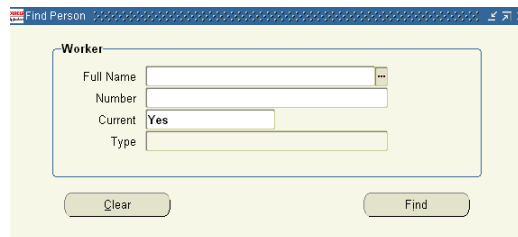
## Viewing History

The Employee Assignment History report is demonstrated here, but the Salary and Salary History reports work similarly.

1. From the Navigator menu, choose View -> Histories -> Employee Assignment.



2. Search for the employee by entering either the Full Name or Number field. Then click Find.

A screenshot of a "Find Person" dialog box. The dialog has a title bar "Find Person" and a close button. Inside, there is a section titled "Worker" containing four input fields: "Full Name" (with a dropdown arrow), "Number", "Current" (with the value "Yes" entered), and "Type". At the bottom of the dialog are two buttons: "Clear" and "Find".



3. The following information is provided for you. The Assignment History block summarizes all the changes to each assignment a person has. The Seq column indicates which assignment the line applies to.

Assignment History: 16-AUG-2005

| All Periods |    | Contingent Worker |        | Total |        | Including Breaks |        |
|-------------|----|-------------------|--------|-------|--------|------------------|--------|
| Employee    |    | Years             | Months | Years | Months | Years            | Months |
| 3           | 10 |                   |        | 3     | 10     | 3                | 10     |

**Work History**

- Date: Start  End   
 - This Period: Years  Months   
 - Worker Type:  Employee  Contingent Worker  
 Business Group:

**Assignment History**

- Effective Dates

| Seq | From        | To          | Organization         | Job                 | Position |
|-----|-------------|-------------|----------------------|---------------------|----------|
| 2   | 01-AUG-2004 |             | College of Veterinar | 999991.Stu Coordina |          |
| 1   | 01-JAN-2003 |             | Biomedical Science   | 999674.Stu Tech V   |          |
| 1   | 10-OCT-2001 | 31-DEC-2002 | Biomedical Science   | 999674.Stu Tech V   |          |