KU HUMAN RESOURCES
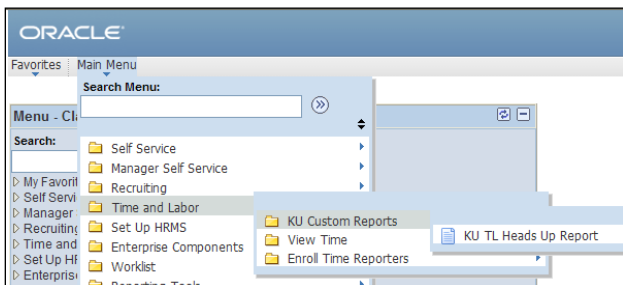The University of Kansas

HR/Pay

Heads Up Report
Procedural Reference

(adapted from KUMC)

HEADS UP REPORT

The Heads Up Report is a tool to help managers track their employee's time for a pay period. It displays time awaiting approval (including exceptions) and approved time. Reports for Absence Requests are also included.

Navigation and Run Control

1. Click Main Menu > Time and Labor > KU Custom Reports > KU TL Heads Up Report.

2. PeopleSoft prompts you for a Run Control ID.

   If you have previously created a Run Control, click the **Search** button.

3. If you have not previously created a Run Control, click **Add a New Value**.

   You can use any name as long as it does not contain spaces or special characters. You can use the report name, if that makes it easier to remember. For example, for this report it would be HeadsUp (no spaces).

4. Click **Add**.

   The next time you run the report you will use the Run Control name created in this step.

HEADS UP REPORT

Selection Criteria

1. PeopleSoft displays the Criteria Page for the Report.

2. Click 🔍 (Look Up) button for company.

3. Select KUL.

4. Enter Department Number in both From and To fields. (7 Digit "HR" Department)

Selection Criteria *(continued)* Run Report

KU TL Heads Up Report

Run Control ID: HeadsUp   Report Manager   Process Monitor   **Run**   ❸

Run Parameters

*Company   KMC 🔍   Univ. of Kansas Medical Ctr

*From Department 99999 🔍   My Own Department

*To Department   99999 🔍

☑ TL OK to Pay   ☑ Absence Request Approved   }   ❶
☑ TL Not OK to Pay   ☑ Absence Request Not Approved

Process Scheduler Request

User ID: M0000079115   Run Control ID: HeadsUp

Server Name: [▼]   Run Date: 09/12/2012 📅
Recurrence: [▼]   Run Time: 8:43:13AM   [Reset to Current Date/Time]
Time Zone: [🔍]

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	KU TL Heads Up Report	JTL001	SQR Report	Web ▼	PDF ▼	Distribution

[OK] [Cancel]

🖉 **Step 4** Process Name for the Heads Up Report is JTL001.

1. There are four check boxes which determine the data for the report.

Check Box	Data Included
TL OK to Pay	Approved Time
TL Not OK to Pay	Time needing to be approved including time with exceptions
Absence Request Approved	Approved Absences
Absence Request Not Approved	Absences needing approval

2. Check/Uncheck boxes to get desired data.

3. Click [Run] .

4. No changes are needed on this screen. 🖉

5. Click [OK] .

HEADS UP REPORT

View Report

1. Click **Process Monitor** link.

   This will display the Process List which shows the progress of generating the report. The Process List also contains the link for printing the report.

2. Note **Run Status**. ❶

Run Status	Description
Queued	Report is in line to be processed
Initiated	Report has started
Processing	Report is in process
Posting	Report is being finalized
Success	Report is ready to print

   Click [Refresh] ❷ until Run Status displays Success and Distribution Status = Posted.
   (May need to wait a few minutes and refresh again.)

3. Click **Details** link. ❸

View Report *(continued)*

Process Detail

Process

Instance 6412 Type SQR Report
Name JTL001 Description KU TL Heads Up Report
Run Status Success Distribution Status Posted

Run

Run Control ID HeadsUp
Location Server
Server PSUNX
Recurrence

Update Process

○ Hold Request
○ Queue Request
○ Cancel Request
◉ Delete Request
○ Restart Request

Date/Time

Request Created On 09/12/2012 8:43:44AM CDT
Run Anytime After 09/12/2012 8:43:13AM CDT
Began Process At 09/12/2012 8:44:05AM CDT
Ended Process At 09/12/2012 8:44:48AM CDT

Actions

Parameters   Transfer
Message Log
Batch Timings
View Log/Trace

OK   Cancel

4. Click **View Log/Trace** link.

View Log/Trace

Report

Report ID: 5014   Process Instance: 6412   Message Log
Name: JTL001   Process Type: SQR Report
Run Status: Success

KU TL Heads Up Report

Distribution Details

Distribution Node: HTTPSonly   Expiration Date: 10/17/2012

File List

Name	File Size (bytes)	Datetime Created
SQR_JTL001_6412.log	1,848	09/12/2012 8:44:48.328417AM CDT
jtl001_6412.out	1,109	09/12/2012 8:44:48.328417AM CDT
jtl001_abs_apprvd.csv	171	09/12/2012 8:44:48.328417AM CDT
jtl001_abs_not_approved.csv	174	09/12/2012 8:44:48.328417AM CDT
jtl001_tl_not_ok.csv	210	09/12/2012 8:44:48.328417AM CDT
jtl001_tl_ok.csv	1,518	09/12/2012 8:44:48.328417AM CDT

Distribute To

Distribution ID Type	*Distribution ID
User	M0000079115

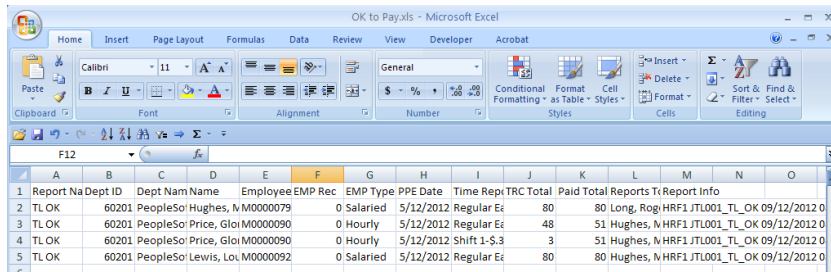Note that each requested report is in a separate CSV file.

5. Click the file to open.

PeopleSoft will launch Excel and open the file.

You may see a File Download dialog box. If so, click Open button to open the file.

View Report *(continued)*

The data will display in a spreadsheet.