

Department of Personnel

HRMS Reporting

PPA Presentation

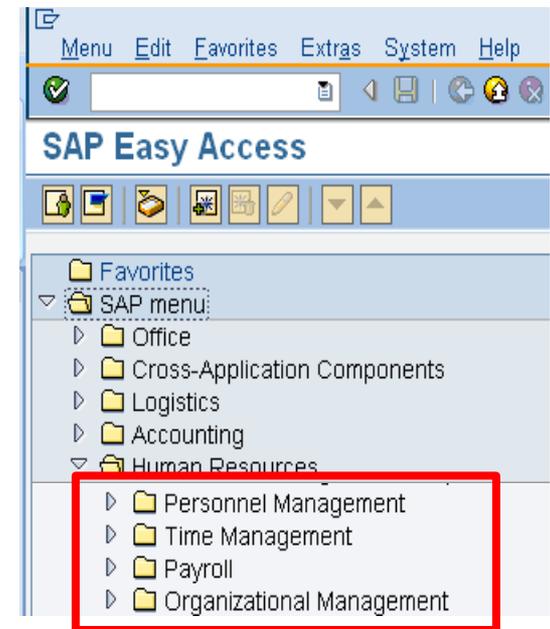
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2/26/09

Reports in HRMS

HRMS reports are available across functional areas of HRMS (Payroll/Personnel/Benefits) to allow you to:

- § Access reports and data related to your agency business tasks
- § Make business decisions
- § Take a snapshot of data for your agency (sub-agency)
- § Change how data is displayed in and apply filters to fit your unique agency requirements



Reports in HRMS

There are three basic types of reports:

Standard reports (begin with an **S**)

§ Included with the SAP software and meet Washington State's general business needs. (Standard reports are also referred to as "SAP Standard" reports in HRMS materials.)

Customized reports (begin with **ZHR**)

§ Created by the HRMS Project Team specifically for Washington State's business needs.

Business Warehouse (BW) reports

§ Provides end users the ability to develop ad-hoc queries.

§ BW reports will be discussed in the "Business Warehouse" course. (Visit the following website for more information:

<http://www.dop.wa.gov/HRMS/CustomerSupport/BusinessWarehouse/Default.htm>)

Reports in HRMS

Key Features and Benefits:

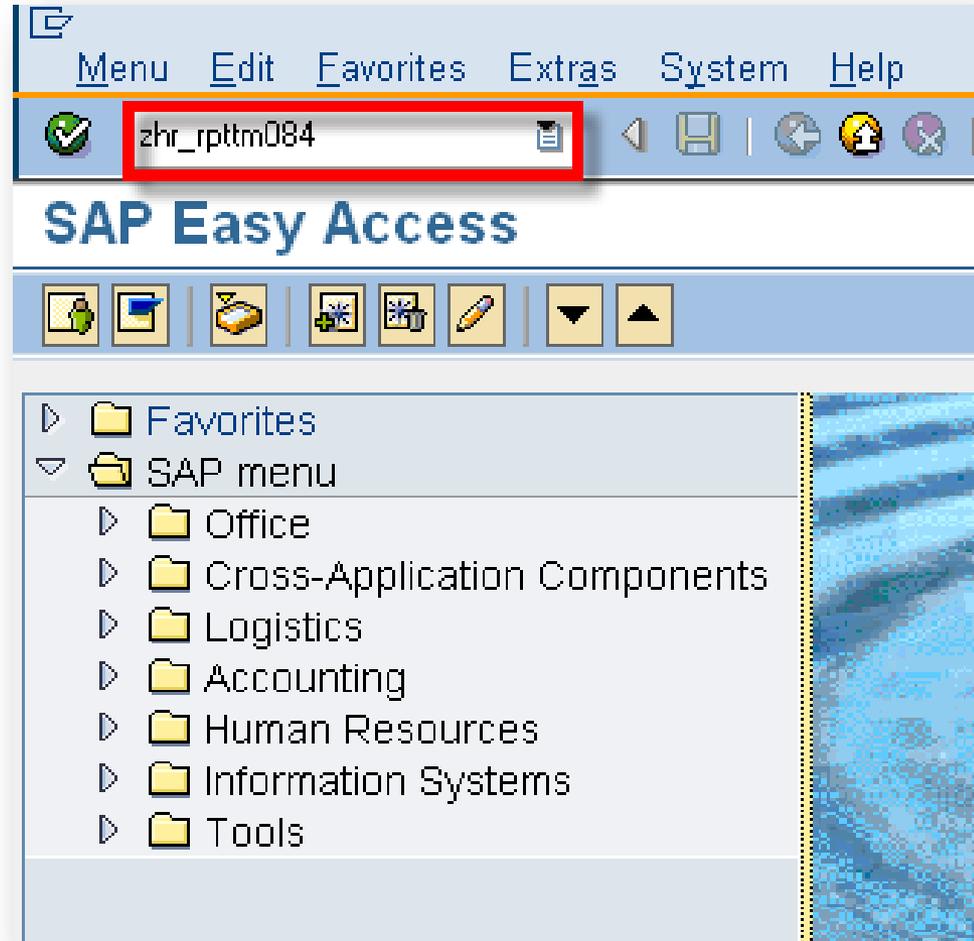
- § Ability to view reports on demand.
- § View online or choose to print.
- § Customize for type of data you want to view/generate.
- § Ability to export and manipulate data.
- § Most information in real-time.



Accessing / Viewing Reports

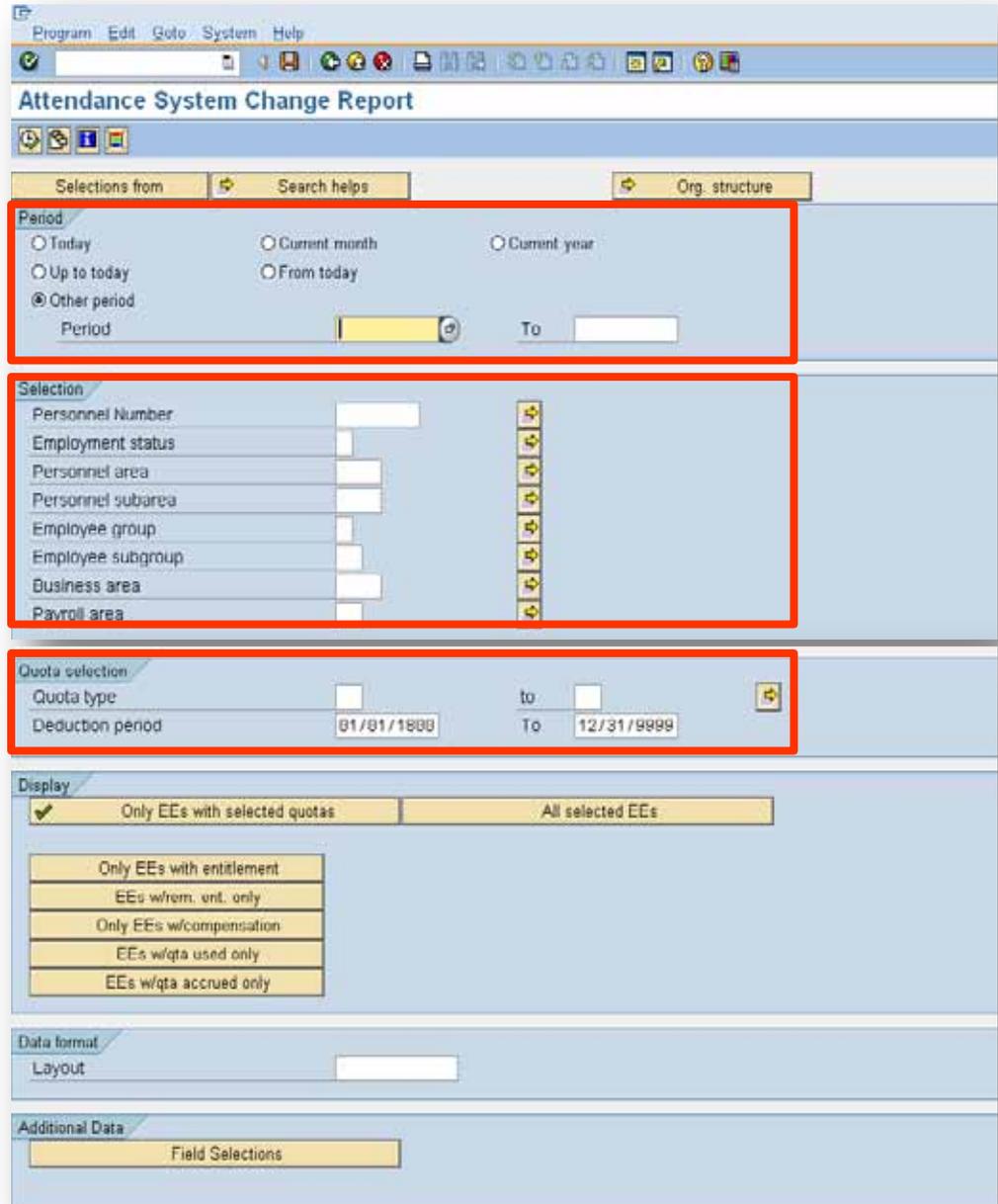
Your role determines which reports you can access and the data that displays within the report.

1. From the *SAP Easy Access* screen, type the transaction code in the Command field. (e.g. ZHR_RPTTM084 – Attendance System Change Report)
2. Click  (Enter) to start transaction.



Accessing / Viewing Reports

3. Select the criteria for your report.
 - § Period (time frame)
 - § Selection (personnel number, personnel area, etc.)
 - § Quota selection (additional selection area)
4. Once selected, click  (Execute) to execute the report.



The screenshot shows the 'Attendance System Change Report' interface. The title bar includes 'Program Edit Goto System Help'. Below the title bar is a toolbar with various icons. The main content area is divided into several sections:

- Period:** This section is highlighted with a red box. It contains radio buttons for 'Today', 'Up to today', 'Other period', 'Current month', 'From today', 'Current year', and 'Current year'. The 'Other period' option is selected. Below these options are two input fields labeled 'Period' and 'To'.
- Selection:** This section is also highlighted with a red box. It lists various selection criteria: 'Personnel Number', 'Employment status', 'Personnel area', 'Personnel subarea', 'Employee group', 'Employee subgroup', 'Business area', and 'Payroll area'. Each criterion has a corresponding input field and a dropdown arrow icon.
- Quota selection:** This section is highlighted with a red box. It includes a 'Quota type' dropdown and a 'Deduction period' with 'From' and 'To' date fields. The 'From' date is set to '01/01/1900' and the 'To' date is set to '12/31/9999'.
- Display:** This section contains two radio buttons: 'Only EEs with selected quotas' (which is checked) and 'All selected EEs'. Below these are several stacked buttons for filtering the results: 'Only EEs with entitlement', 'EEs w/rem. ent. only', 'Only EEs w/compensation', 'EEs w/qta used only', and 'EEs w/qta accrued only'.
- Data format:** This section has a 'Layout' dropdown menu.
- Additional Data:** This section has a 'Field Selections' button.

Printing and Variants

Personal Printing Settings

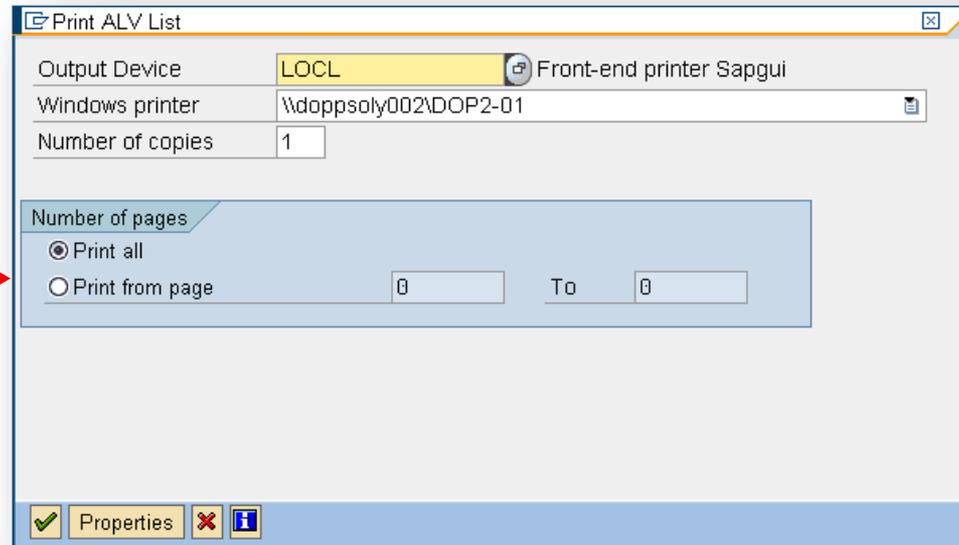
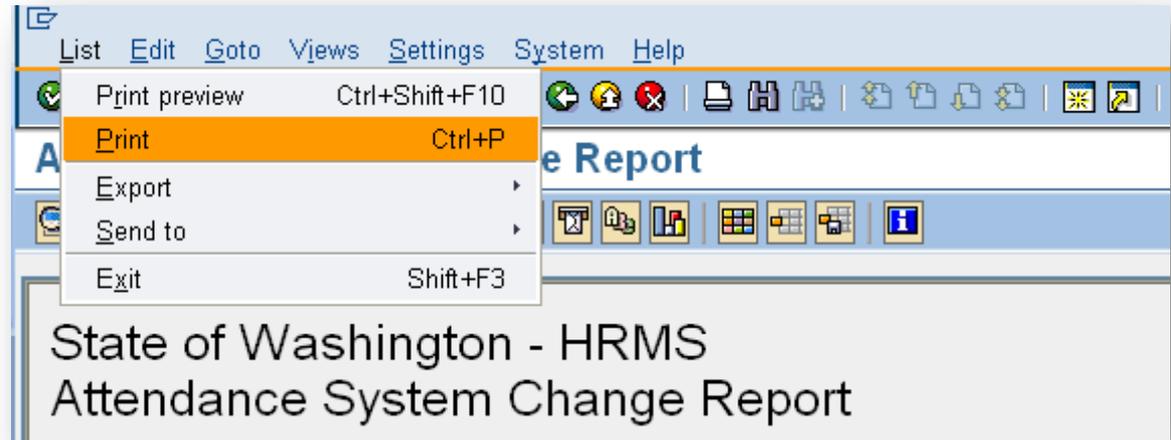
- § End users will need default print settings established on their computer profile to enable printing from their local printer.
- § If the settings are not established on your computer, your print job will go to the system spool and will not print.
- § Work with your agency's Help Desk or IT staff to establish your default print settings.



Printing Reports

Once you have executed a report and have viewed the results, you can choose to print a copy.

1. From the menu bar, select List
2. Select Print
3. The Print ALV List window appears, confirm the correct printer is selected.
4. Enter number of copies
5. Click  (Enter)



Report Variant

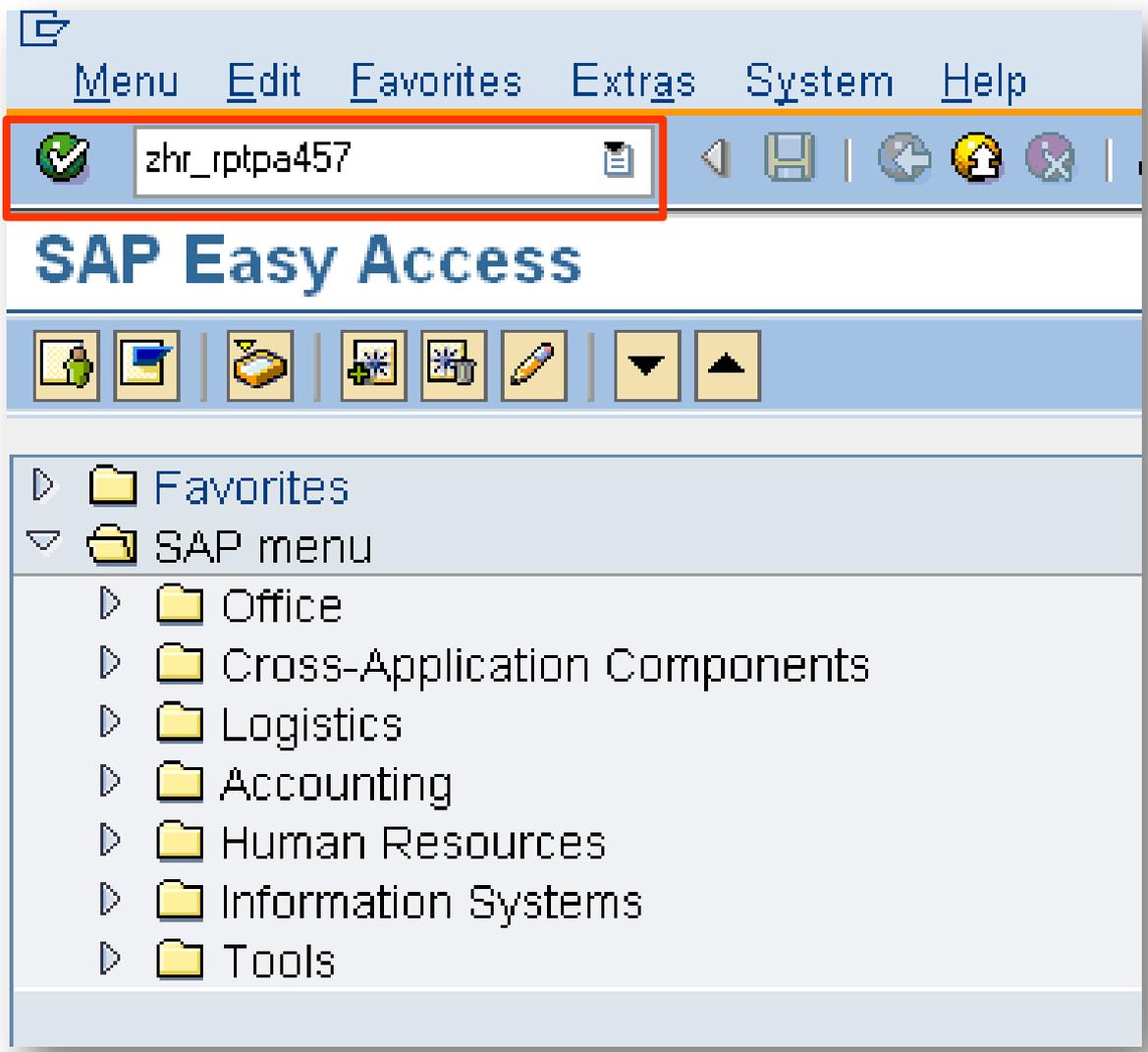
- § A Variant is a report where one or more selected criteria is saved as a parameter.
 - Use variants to access frequently used/common reports.
 - Eliminates redundant data entry.
- § Once you have accessed a report you are able to save a variant.
- § A list of statewide variants is located on the Customer Support page by selecting HRMS Resources.
 - § Statewide Variant List: DOP created this list to assist agencies in identifying statewide variants. The spreadsheet has several worksheets. The first worksheet lists ALL statewide variants.

Note: Be sure to review state-wide variants (swv) before creating new ones.

Create/Save a Variant

Creating a Variant

- To create a Variant, a report transaction code is required.
- § Enter a transaction code in the Command field.
- § Click  (Enter) to start the transaction.



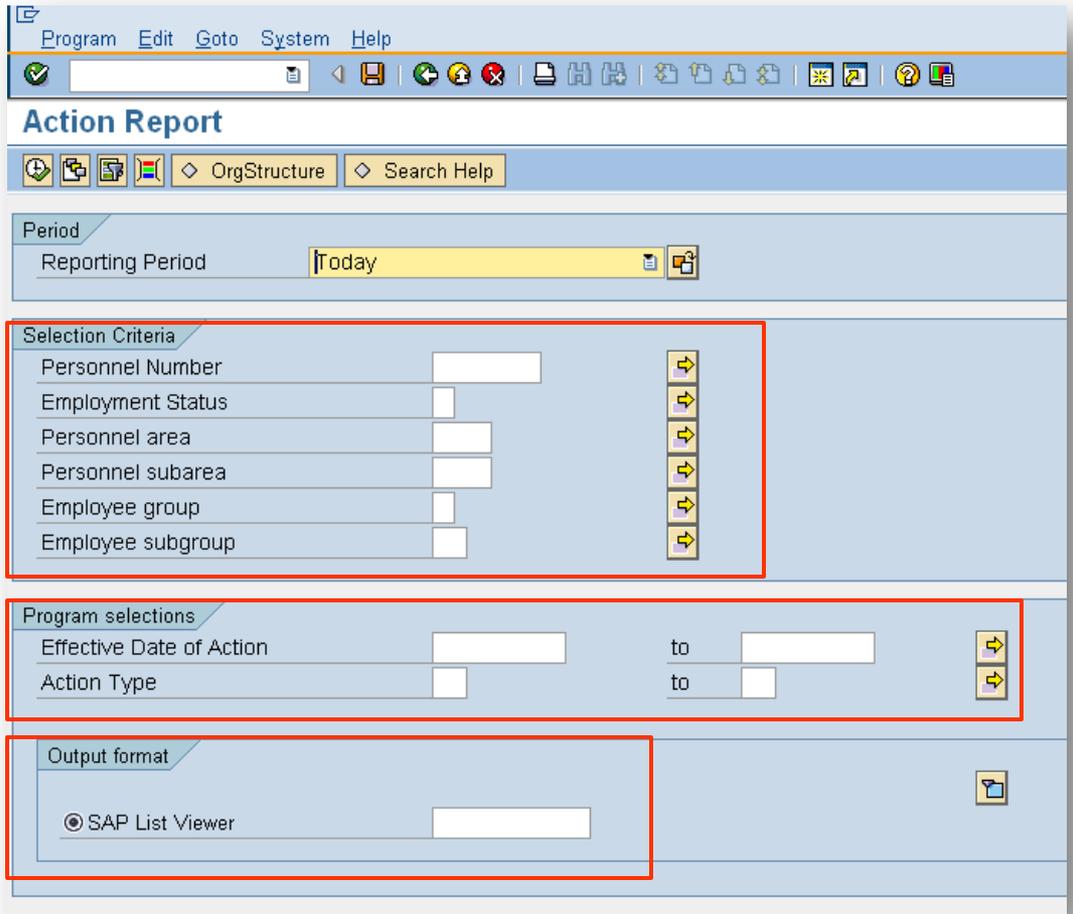
Creating a Variant

You must select fields (criteria) in order to save the variant.
§ For this example we will select fields in these areas:

§ *Selection Criteria*

§ *Program selections*

There is no minimum or maximum number of criteria you can use to create a variant. The more criteria used the more specific the report; less criteria, the more general the report.



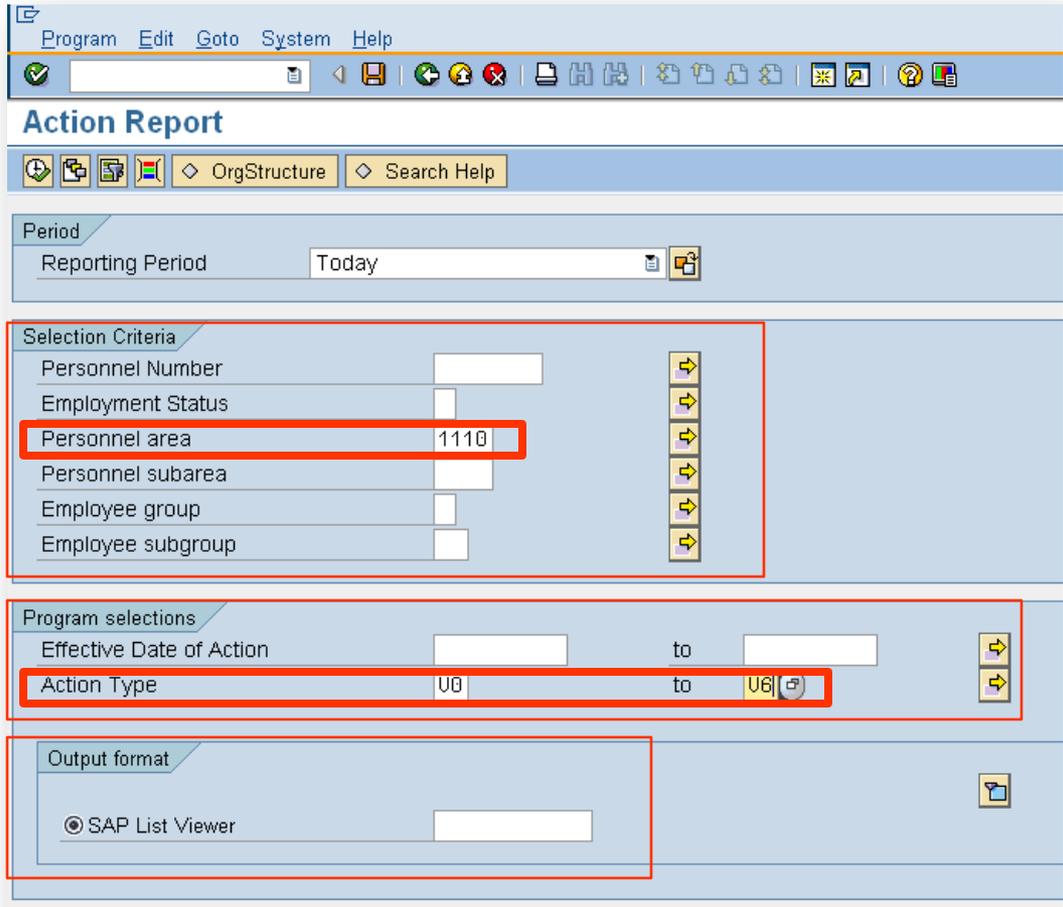
Refer to Variants_Create and Retrieve in the OLQR

Creating a Variant

In this example, a variant will be created for the *Action Report* (ZHR_RPTPA457). Used to identify all new hires in the agency.

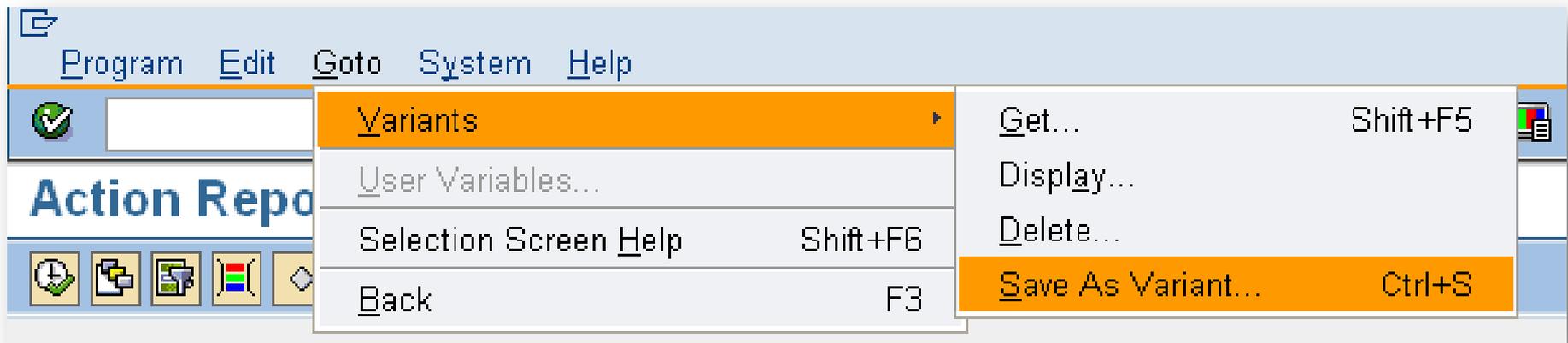
Add entries in the *Selection Criteria* area and *Program selections* area.

- § Personnel area
1110 – Dept. of Personnel
- § Action Type
U0 New Hire to U6 Re-hire



Saving a Variant

1. To save the report with your selected criteria, on the Menu Bar click Goto à Variants à Save as Variant



Note: You can also use [Ctrl + S] or click  (Save) to save a variant.

Saving a Variant

- 2. Complete the *Variant Name* and *Meaning* fields
- 3. Click  (Enter) to validate the data
- 4. Click  (Save) to save the data

Selection Scrn	Field name	Type	Protect field	Hide field	Hide field 'BIS'	Save field without
1,000	Data Selection Period	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1,000	Data Selection Period: Start	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

You will return to the report page

 Variant 1110 DOP NEWEE saved

The variant was saved.
Note the message in the status bar.

Tip:
Clicking the Protect Variant box will help ensure that no one will save over your variant. This is optional.

Retrieve a Variant

Retrieve a Variant

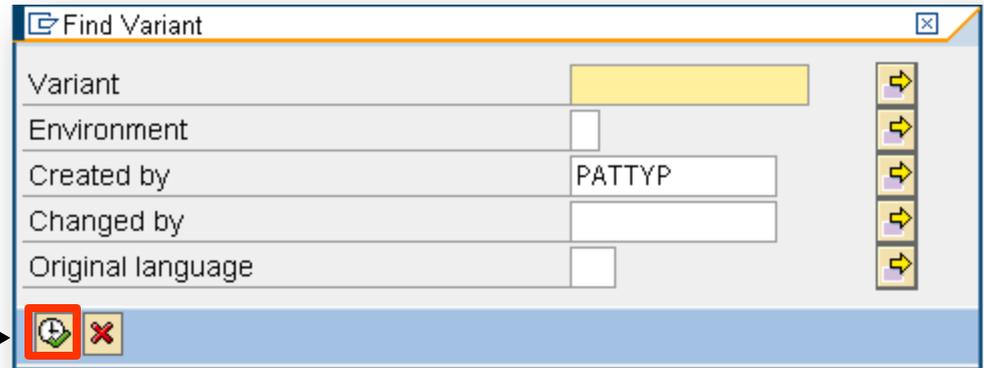
1. To retrieve a variant from the report screen click Goto à Variants à Get



Note: You can also click Shift + F5 or click  (Get Variant) button to retrieve a variant.

Retrieve a Variant

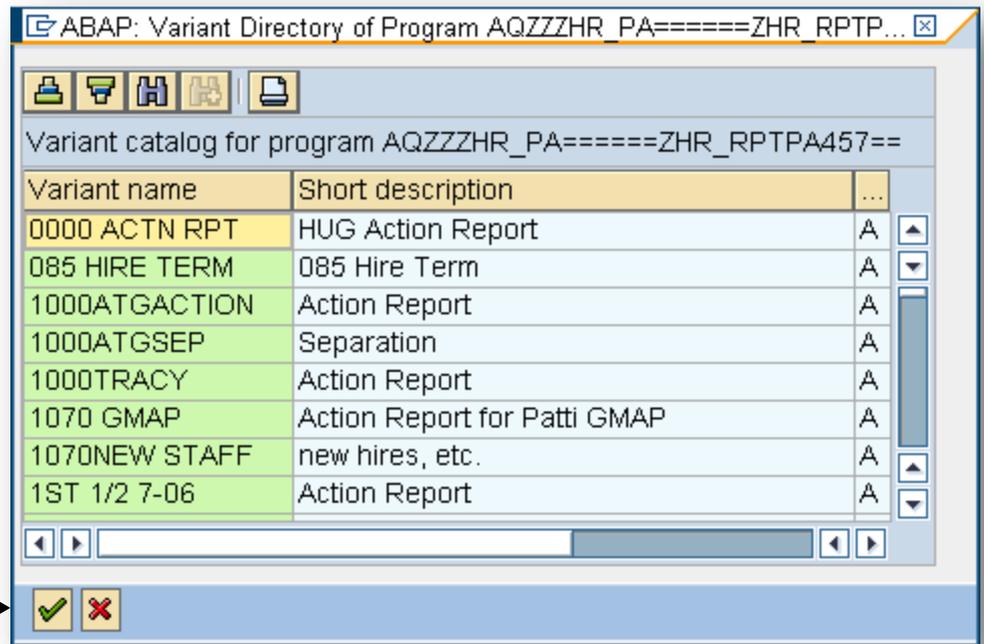
2. Click  (Execute) to search for the variants *you* created.
- Or
2. Remove your user name from the Created by field to see all variants created.
3. A pop-up box providing a list of variants appears. Double-click on the variant report that you want to retrieve. Or click once on the variant name, then click  (Choose) to bring your selection into the report screen.



The 'Find Variant' dialog box contains the following fields:

Variant	<input type="text"/>	
Environment	<input type="text"/>	
Created by	PATTYP	
Changed by	<input type="text"/>	
Original language	<input type="text"/>	

At the bottom left, there is a red box around the  and a close button .



Variant catalog for program AQZZZHR_PA====ZHR_RPTPA457==

Variant name	Short description		
0000 ACTN RPT	HUG Action Report	A	
085 HIRE TERM	085 Hire Term	A	
1000ATGACTION	Action Report	A	
1000ATGSEP	Separation	A	
1000TRACY	Action Report	A	
1070 GMAP	Action Report for Patti GMAP	A	
1070NEW STAFF	new hires, etc.	A	
1ST 1/2 7-06	Action Report	A	

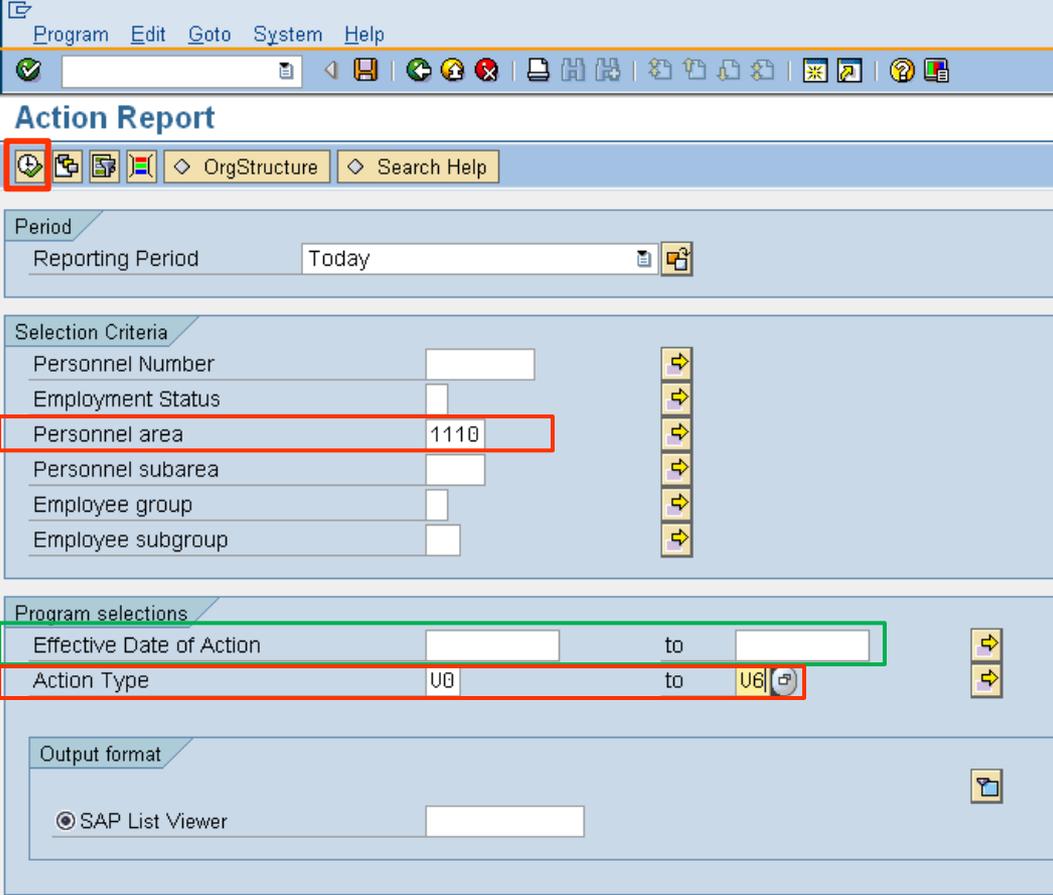
At the bottom left, there is a green box around the  and a close button .

Retrieve a Variant

- The variant (with the saved selection criteria) will display within the report fields, click  (Execute) to generate the report.

Prior to clicking  (Execute) you can add additional selection criteria if needed (such as an **Effective Date of Action** [date range]).

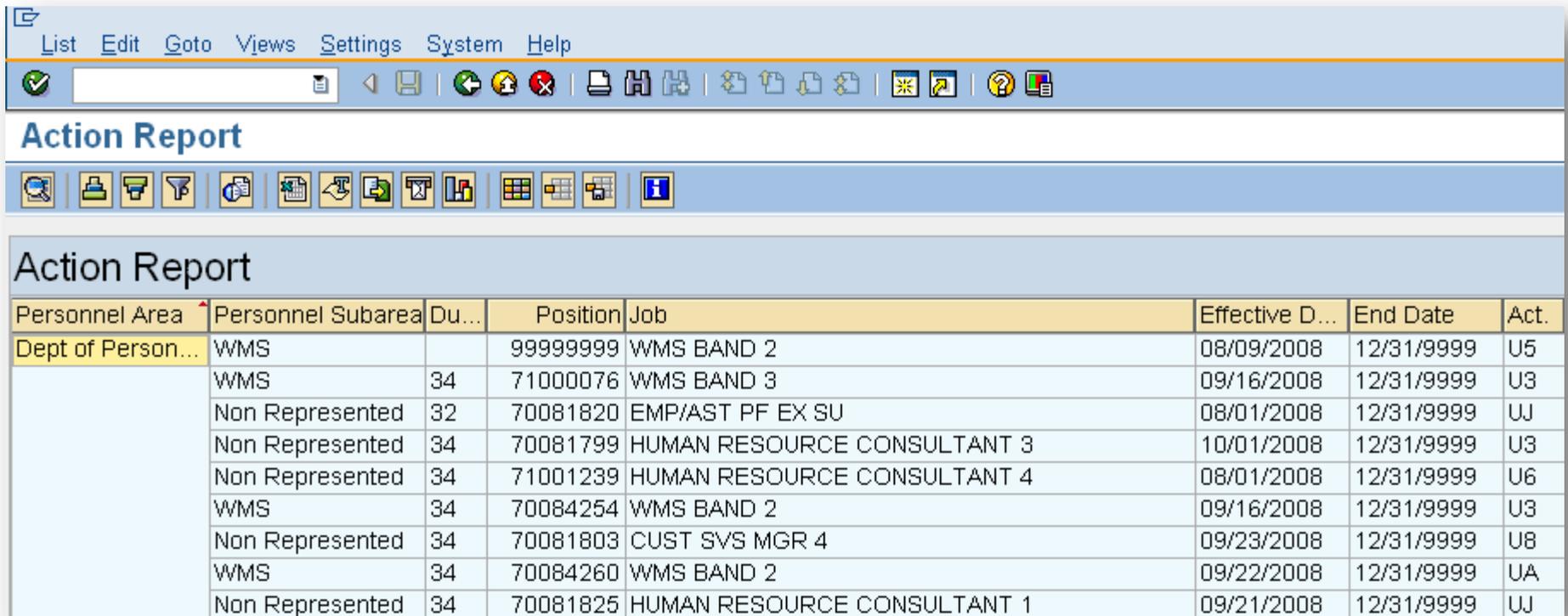
- Adding selection criteria will not change the saved variant settings. This is for a one-time selection.
- To keep the additional criteria selections, resave the variant.



The screenshot shows the SAP Action Report interface. The menu bar includes Program, Edit, Goto, System, and Help. The toolbar contains various icons for navigation and execution. The main area is titled "Action Report" and includes a toolbar with "OrgStructure" and "Search Help" buttons. The "Period" section shows "Reporting Period" set to "Today". The "Selection Criteria" section lists several fields: Personnel Number, Employment Status, Personnel area (highlighted with a red box and containing "1110"), Personnel subarea, Employee group, and Employee subgroup. The "Program selections" section includes "Effective Date of Action" (highlighted with a green box) and "Action Type" (highlighted with a red box and containing "U0"). The "Output format" section shows "SAP List Viewer" selected.

Retrieve a Variant

- § The requested report is generated based on the selection criteria outlined in the variant.
- § At this time you would verify the report information and utilize the report as desired.



The screenshot displays a software interface with a menu bar (List, Edit, Goto, Views, Settings, System, Help) and a toolbar. Below the toolbar, the title 'Action Report' is visible. The main content area contains a table with the following data:

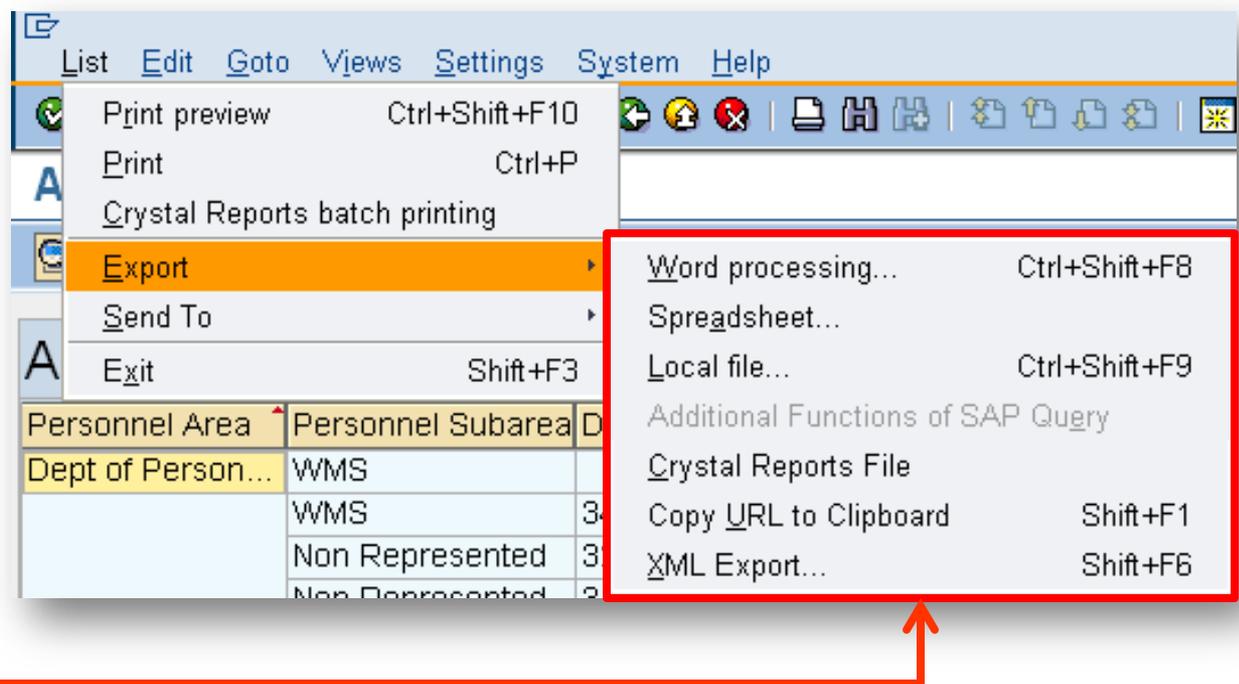
Personnel Area	Personnel Subarea	Du...	Position	Job	Effective D...	End Date	Act.
Dept of Person...	WMS		99999999	WMS BAND 2	08/09/2008	12/31/9999	U5
	WMS	34	71000076	WMS BAND 3	09/16/2008	12/31/9999	U3
	Non Represented	32	70081820	EMP/AST PF EX SU	08/01/2008	12/31/9999	UJ
	Non Represented	34	70081799	HUMAN RESOURCE CONSULTANT 3	10/01/2008	12/31/9999	U3
	Non Represented	34	71001239	HUMAN RESOURCE CONSULTANT 4	08/01/2008	12/31/9999	U6
	WMS	34	70084254	WMS BAND 2	09/16/2008	12/31/9999	U3
	Non Represented	34	70081803	CUST SVS MGR 4	09/23/2008	12/31/9999	U8
	WMS	34	70084260	WMS BAND 2	09/22/2008	12/31/9999	UA
	Non Represented	34	70081825	HUMAN RESOURCE CONSULTANT 1	09/21/2008	12/31/9999	UJ

Export a Report

Exporting Report Data

Once you have run a report, use the menu bar to export data.

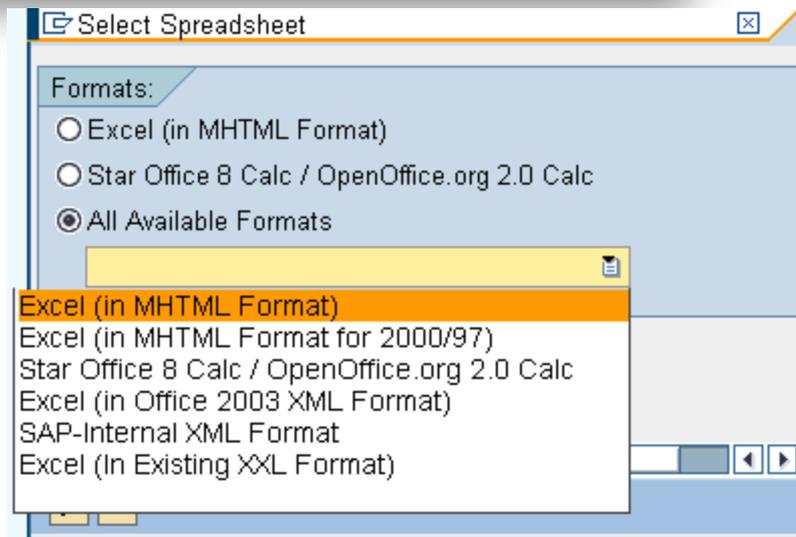
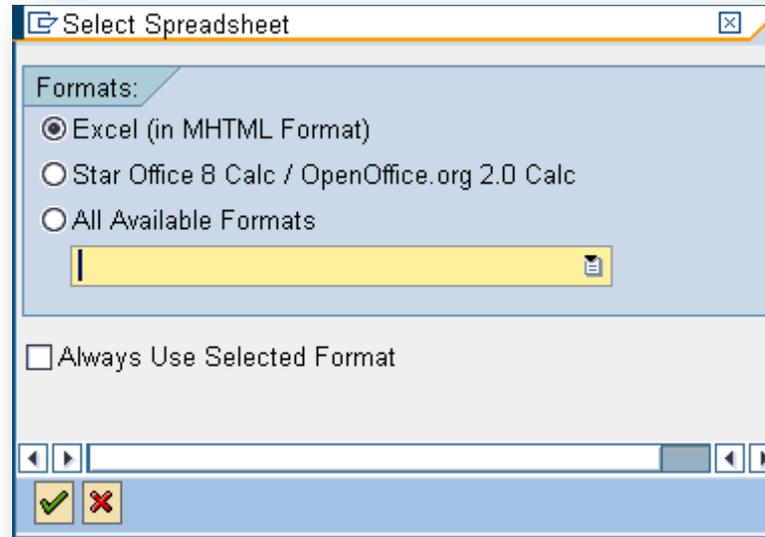
1. Select List then Export to select the type of file you want to create.



Exporting Report Data (con't)

2. If you accept the default format - Excel (in MHTML Format) then, click (Continue)  move to the next step in exporting the report results.
3. If another format is needed click on All Available Formats to choose your desired format.

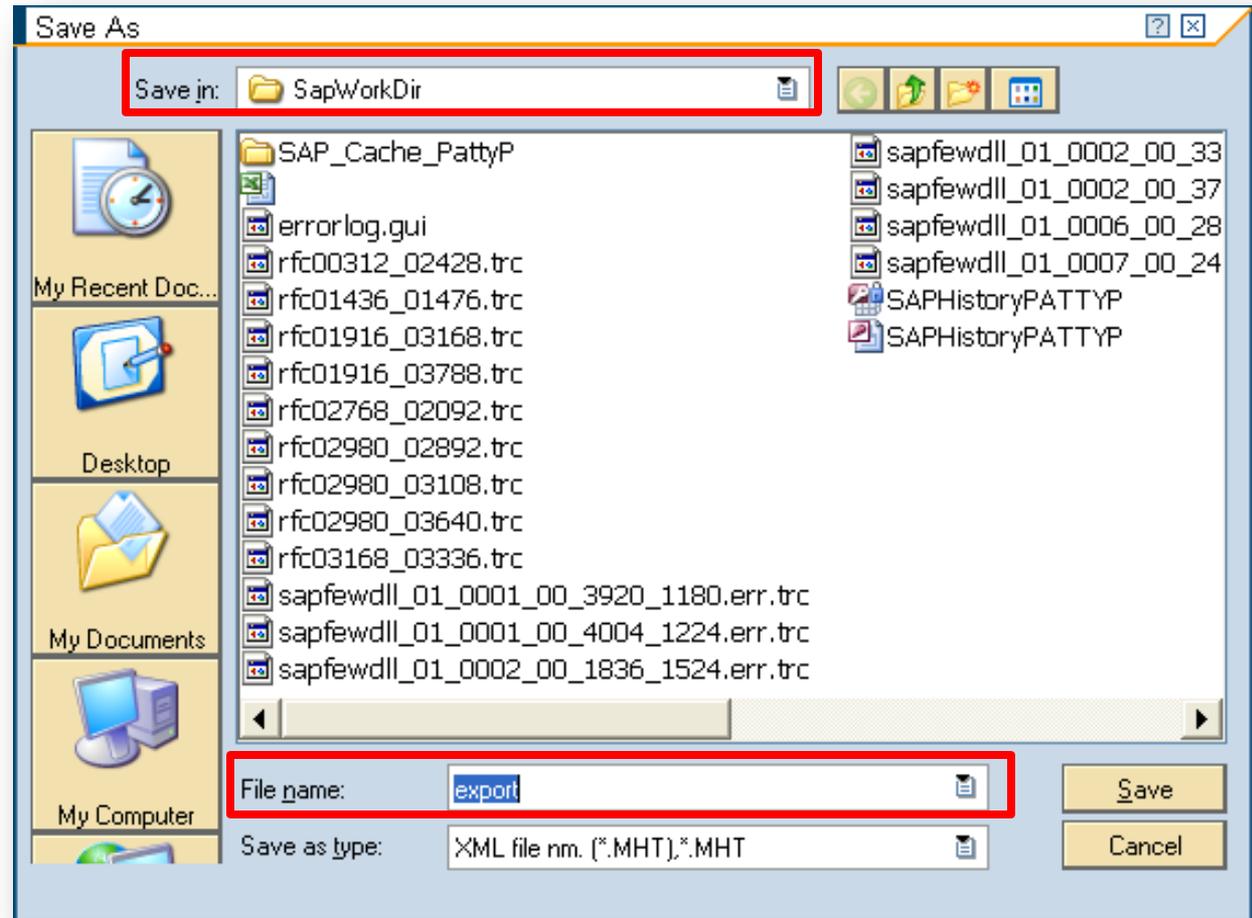
MHTML is short for MIME HTML which is a web page archive format.



Exporting Report Data (con't)

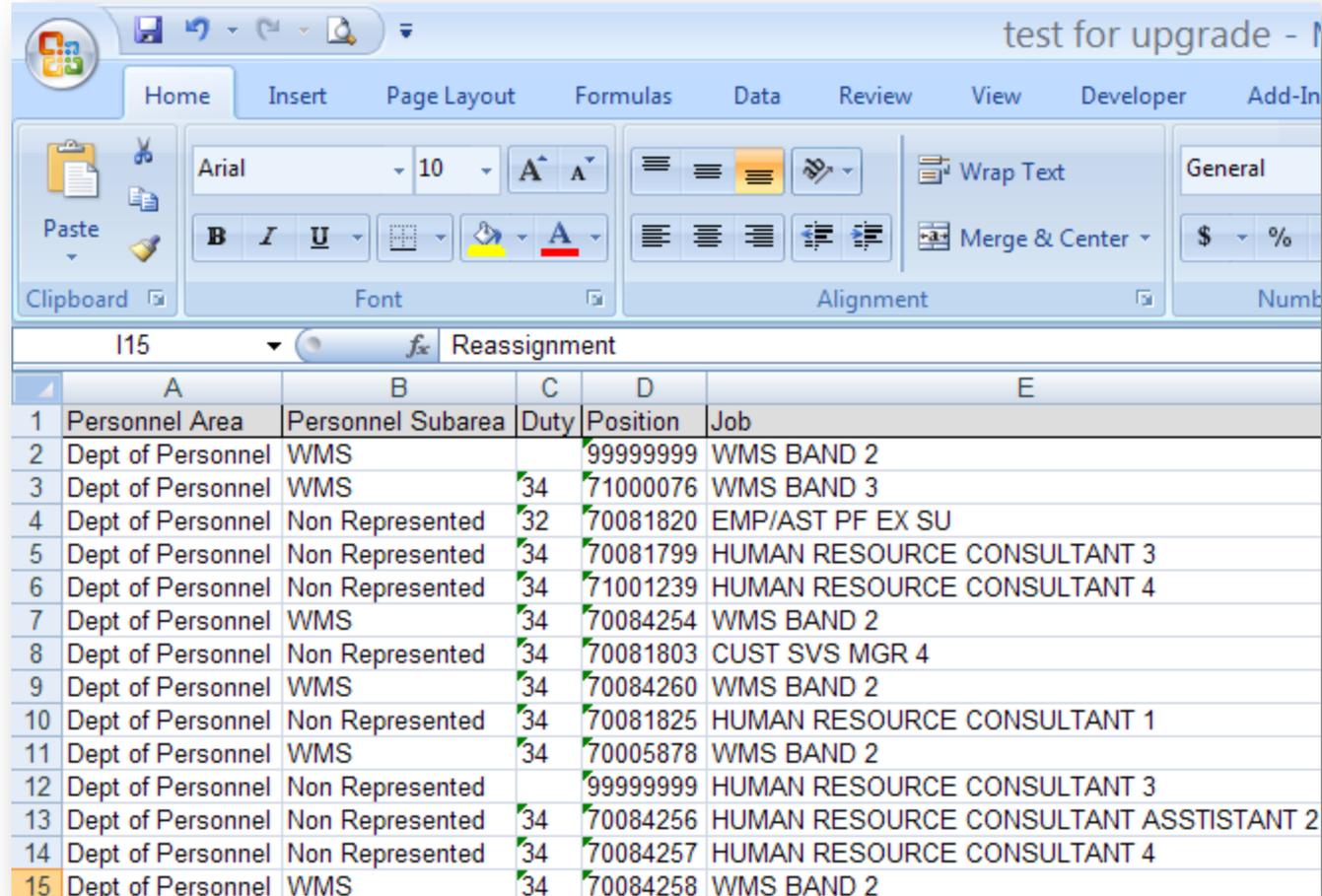
If the Excel (in MHTML Format) was selected.

1. Identify the location to save the file and the file name.
2. Click  (Save) icon to save the file.



Exporting Report Data

The format that you previously selected (ex: Excel) will open displaying the report results.

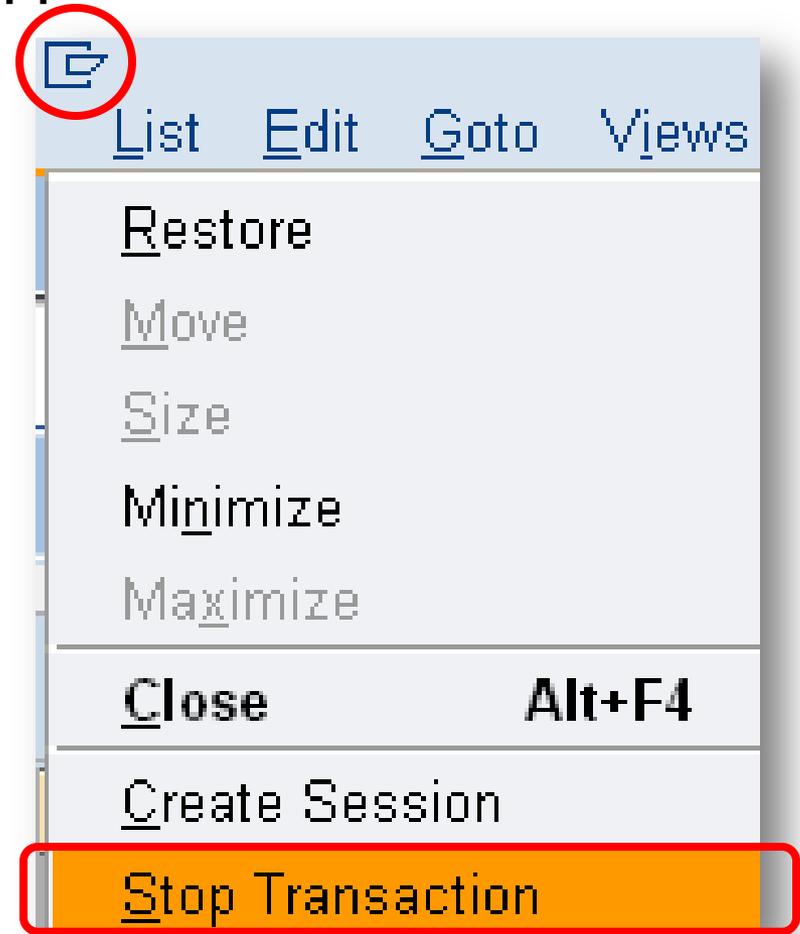


The screenshot shows the Microsoft Excel interface with the following data:

	A	B	C	D	E
1	Personnel Area	Personnel Subarea	Duty	Position	Job
2	Dept of Personnel	WMS		99999999	WMS BAND 2
3	Dept of Personnel	WMS	34	71000076	WMS BAND 3
4	Dept of Personnel	Non Represented	32	70081820	EMP/AST PF EX SU
5	Dept of Personnel	Non Represented	34	70081799	HUMAN RESOURCE CONSULTANT 3
6	Dept of Personnel	Non Represented	34	71001239	HUMAN RESOURCE CONSULTANT 4
7	Dept of Personnel	WMS	34	70084254	WMS BAND 2
8	Dept of Personnel	Non Represented	34	70081803	CUST SVS MGR 4
9	Dept of Personnel	WMS	34	70084260	WMS BAND 2
10	Dept of Personnel	Non Represented	34	70081825	HUMAN RESOURCE CONSULTANT 1
11	Dept of Personnel	WMS	34	70005878	WMS BAND 2
12	Dept of Personnel	Non Represented		99999999	HUMAN RESOURCE CONSULTANT 3
13	Dept of Personnel	Non Represented	34	70084256	HUMAN RESOURCE CONSULTANT ASSISTANT 2
14	Dept of Personnel	Non Represented	34	70084257	HUMAN RESOURCE CONSULTANT 4
15	Dept of Personnel	WMS	34	70084258	WMS BAND 2

Stopping a Transaction

1. To end a report before it has completed, you can stop the transaction
2. From the Menu bar click the square in the uppermost left corner
3. Click Stop transaction



Note: Once selected, you will be taken directly to the SAP Easy Access screen.