



# HR/Pay

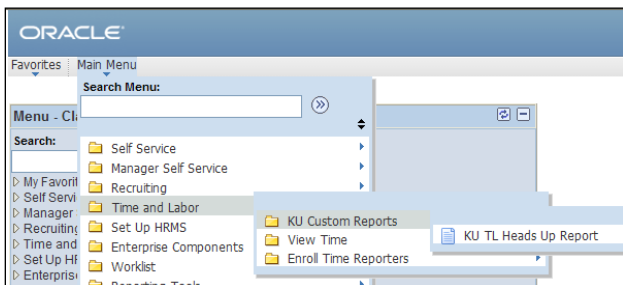
# Heads Up Report Procedural Reference

(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



**KU TL Heads Up Report**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value   Add a New Value

Search Criteria

Search by: Run Control ID begins with

Case Sensitive

Search   Advanced Search

**KU TL Heads Up Report**

Find an Existing Value   Add a New Value

Run Control ID:

Add

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  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 .

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

# HEADS UP REPORT

## Selection Criteria

KU TL Heads Up Report

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

Run Parameters

\*Company

\*From Department

\*To Department

TL OK to Pay  Absence Request Approved  
 TL Not OK to Pay  Absence Request Not Approved

Look Up Company

Search by: Company  begins with

[Advanced Lookup](#)

Search Results

View 100 First 1-3 of 3 Last

Company	Description
<a href="#">KMC</a>	Univ. of Kansas Medical Ctr
<a href="#">KUL</a>	University of Kansas
<a href="#">SOK</a>	State of Kansas

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)

KU TL Heads Up Report

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

Run Parameters

\*Company  Univ. of Kansas Medical Ctr

\*From Department  My Own Department

\*To Department

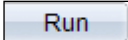
TL OK to Pay  Absence Request Approved  
 TL Not OK to Pay  Absence Request Not Approved

# HEADS UP REPORT


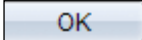
## Selection Criteria (continued) Run Report


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  .

### Process Scheduler Request

4. No changes are needed on this screen. 
5. Click  .

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

# HEADS UP REPORT

## View Report

KU TL Heads Up Report

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

**Run Parameters**

\*Company  Univ. of Kansas Medical Ctr

\*From Department  PeopleSoft Admin Support

\*To Department

TL OK to Pay  Absence Request Approved

TL Not OK to Pay  Absence Request Not Approved

Process List

**Actions**

User ID  Type  Last   Days

Server  Name  Instance  to

Run Status  Distribution Status   Save On Refresh

**Process List** Personalize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	6412		SQR Report	JTL001	M0000079115	09/12/2012 8:43:13AM CDT	Success	Posted	<a href="#">Details</a>

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  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

# HEADS UP REPORT

## 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**      **Update Process**

Run Control ID HeadsUp       Hold Request  
Location Server       Queue Request  
Server PSUNX       Cancel Request  
Recurrence       Delete Request  
                                  Restart Request

**Date/Time**      **Actions**

Request Created On 09/12/2012 8:43:44AM CDT      [Parameters](#)      Transfer  
Run Anytime After 09/12/2012 8:43:13AM CDT      [Message Log](#)  
Began Process At 09/12/2012 8:44:05AM CDT      Batch Timings  
Ended Process At 09/12/2012 8:44:48AM CDT      [View Log/Trace](#) ←

OK      Cancel

- 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
<a href="#">SQR_JTL001_6412.log</a>	1,848	09/12/2012 8:44:48.328417AM CDT
<a href="#">jtl001_6412.out</a>	1,109	09/12/2012 8:44:48.328417AM CDT
<a href="#">jtl001_abs_apprvd.csv</a>	171	09/12/2012 8:44:48.328417AM CDT
<a href="#">jtl001_abs_not_approved.csv</a>	174	09/12/2012 8:44:48.328417AM CDT
<a href="#">jtl001_tl_not_ok.csv</a>	210	09/12/2012 8:44:48.328417AM CDT
<a href="#">jtl001_tl_ok.csv</a>	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.

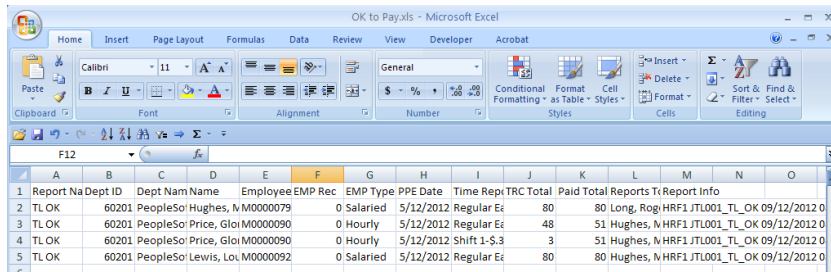
- Click the file to open.

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.

# HEADS UP REPORT

## View Report (continued)



The screenshot shows a Microsoft Excel spreadsheet with the following data:

Report Na	Dept ID	Dept Nam	Name	Employee	EMP Rec	EMP Type	PPE Date	Time Rep	TRC Total	Paid Total	Reports Tr	Report Info
1	TL OK	60201	PeopleSol	Hughes, N	M0000079	0 Salaried	5/12/2012	Regular E	80	80	Long, Rog	HRF1.JTL001_TL_OK 09/12/2012 0
2	TL OK	60201	PeopleSol	Price, Gloi	M0000090	0 Hourly	5/12/2012	Regular E	48	51	Hughes, N	HRF1.JTL001_TL_OK 09/12/2012 0
3	TL OK	60201	PeopleSol	Price, Gloi	M0000090	0 Hourly	5/12/2012	Shift 1-\$3	3	51	Hughes, N	HRF1.JTL001_TL_OK 09/12/2012 0
4	TL OK	60201	PeopleSol	Lewis, Loi	M0000092	0 Salaried	5/12/2012	Regular E	80	80	Hughes, N	HRF1.JTL001_TL_OK 09/12/2012 0

The data will display in a spreadsheet.