

Running Reports in People First

Overview

All data warehouse / Business Objects (BOBJ) and SAP (real-time) reports are accessed from the Reports landing page in People First. These reports are separated into groups by Report category. Data warehouse / BOBJ reports are identified by an asterisk (*) at the end of the report title to indicate that the report is based on data out of the data warehouse and is as of the previous day. However, there are four data warehouse / BOBJ reports (i.e., Agency Leave Liability Report, Benefits Underpayment / Overpayment Report, Leave Balance Report, and OPS FYTD Timesheet Hours Report) for which the data is not updated daily. All SAP reports include data as of the time the report is processed (real-time data). Access to each report is based on the user's People First security role code.

For Talent Management Reports, select the Talent Management tile on the Manager landing page, and then select the Reporting option in the Talent Management navigation menu.

Some reports contain information that is confidential under state or federal laws. Improper access or release of such information may be a violation of these laws. Users are required to follow their agency's policy on the handling of confidential or exempt information when providing any of these reports to anyone who does not have access to process these reports themselves.

Frequency

As needed.

Getting Started

Follow this path to access the Reports landing page: Manager landing page > Reports.

Reports Landing Page

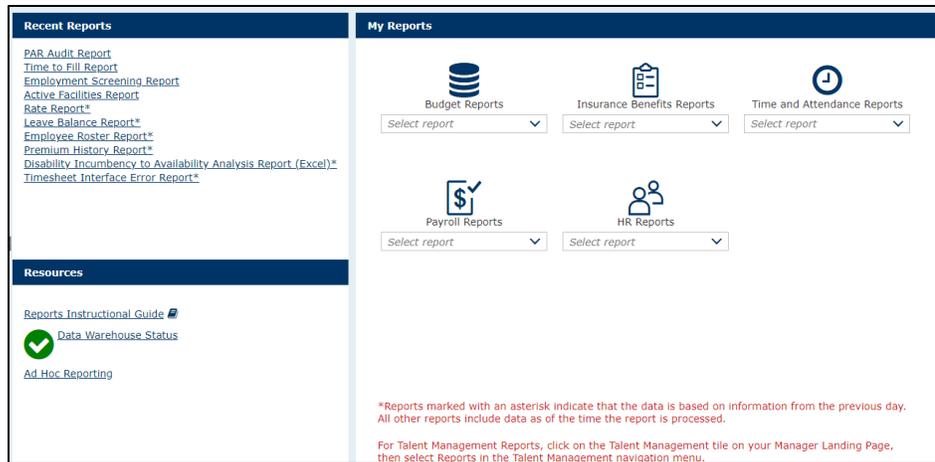
The following sections are shown on the Reports landing page. Some users may not see all report categories, as the ability to access a specific report is based on the user's People First security role code.

- **My Reports** – This section contains the data warehouse / BOBJ and SAP pre-built reports. The reports are grouped by five categories: Budget, Insurance Benefits, Time and Attendance, Payroll, and HR. The categories and reports shown will vary based on the user's security role code.
- **Recent Reports** – This section shows the last 10 canned data warehouse / BOBJ and SAP reports that the user selected within the same internet browser (Note: Clearing browser cache will clear this list). This section shows only the last report processed; it does not re-execute the filters/prompts that the user selected when running the report.
- **Resources** – This section provides a link to the "Running Reports in People First" instructional guide and provides the status of the nightly data warehouse refresh. In addition, if a user has been authorized to access the People First BOBJ reporting tool to create their own reports, an Ad Hoc Reporting link will be shown. When the user selects the Ad Hoc Reporting

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link, it will take them to the BOBJ reporting tool, where they can create their own reports.

- Data Warehouse Status – Visual indicator as to whether the nightly data warehouse refresh has been completed. When the “Data Warehouse Status” link is selected, a list of individual data warehouse (DW) view names and date/time last updated will be shown. This allows users to easily identify the view(s) that have not updated when the DW status indicator is a red “X” (nightly DW refresh has not completed).
 - A green check mark indicates that the nightly data refresh has completed, and data warehouse / BOBJ reports can be processed.
 - A red “X” indicates the nightly data refresh has not been completed and data warehouse / BOBJ reports should not be processed.



SAP Report Processing

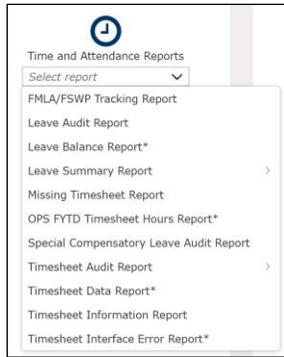
Follow these steps to process an SAP report (reports without the asterisk):

- **Step 1:** Click the dropdown arrow from the Report category.



- **Step 2:** In the dropdown list, select the report to process.

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- **Step 3:** Complete the Report Input grid and click Run Report. Required filters are marked with a red asterisk and must be completed to process the report.

Notes:

- When the report is displayed on the screen, there will be several options available:

Org Code	Appointment ID	Period Begin Date	Period End Date	Employee Name	OT Eligibility	Pay P
72950100000000000000...		02/21/2020	03/05/2020		N	08
72010200000000000000...		02/21/2020	02/27/2020		Y	C
72010200000000000000...		02/28/2020	03/05/2020		Y	C
72010200000000000000...		02/21/2020	02/27/2020		Y	C
72010200000000000000...		02/28/2020	03/05/2020		Y	C
72010200000000000000...		02/21/2020	02/27/2020		Y	C
72010200000000000000...		02/28/2020	03/05/2020		Y	C
72760701000000000000...		02/21/2020	02/27/2020		Y	A
72760701000000000000...		02/28/2020	03/05/2020		Y	A
72780105000000000000...		02/21/2020	02/27/2020		Y	A
72780105000000000000...		02/21/2020	02/27/2020		Y	A
72780105000000000000...		02/28/2020	03/05/2020		Y	A

- Previous Reports – Click on the right arrow to display the date and time the selected report was processed (shows current and previously processed reports). To view the contents of a report, select the applicable row and click View. After selection of the right arrow, the arrow turns into a down arrow . Select the down arrow to collapse the Previous Reports section.

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Previous Reports			
Date	Time	Processed	
07/24/2018	11:31:27 AM		View
07/24/2018	10:47:34 AM		View
07/24/2018	09:36:25 AM		View

- Report Input – Click the right arrow to display the report input grid that shows the criteria entered for the report. After selection of the right arrow, the arrow turns into a down arrow . Select the down arrow to collapse the Report Input section.

> Previous Reports

Report Input Run Report

*Timesheet Date

Appointment ID

*Agency

Payroll Area

Employee Group

- Sort or Filter the Data Within a Column – Click on the column heading and choose Sort Ascending, Sort Descending, or Filter. To select a filter, enter a value in the filter box and press the Enter key. To deselect a filter, delete the value entered in the existing filter and press the Enter key. (Note: The sorting and filter options selected are applied only to the Report Results grid and when downloading to Excel. The sorting and filtering options selected are not applied to the PDF version of the report.)

Period Begin Date

Sort Ascending

Sort Descending

Filter

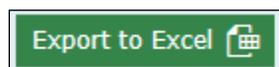
- Resize Columns to Fit – Click the icon to expand the selected column to view the data.



- **Step 4:** Choose the report output type (PDF or Excel) and click OK.

Notes:

- Export to Excel – This option will download the report contents into Excel. A pop-up box or download option will appear based on the internet browser you are using. Follow the prompts in your browser to complete the download (Note: Download options are driven by the internet browser being used and are not controlled by People First).



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- Export to PDF – This option will download the report contents into a PDF.



- The results may take a while to return depending on the report and the selected filters. While PDF reports are formatted for printing, Excel reports are unformatted so that you can work with the data as needed. Most reports are formatted as landscape, legal size.
- If the report takes **more** than three minutes, you will receive a message that you can access the report in the Previous Reports section. The report will be available in the Previous Reports section with the status of the report shown in the Processed column. If a red circle is displayed, the report is still processing. If a green circle is displayed, select View to access the report details.
- If there is no data available for the report criteria, you will receive a message stating “No records found.” If you enter invalid selection criteria, you will see an error message that the value is either invalid or that you do not have authorization to access the data.

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Data Warehouse / BOBJ Report Processing

Follow these steps to process a Data Warehouse / BOBJ report:

- **Step 1:** Click the dropdown arrow from the Report category.



- **Step 2:** In the dropdown list, select the report to process.

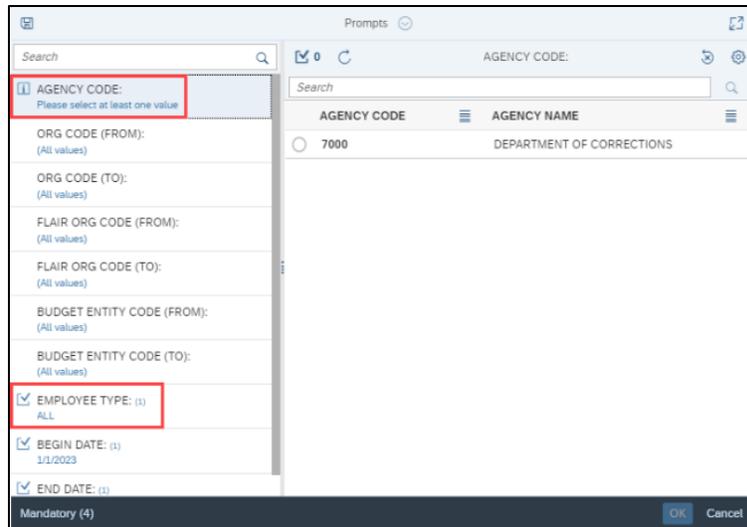
Notes:

- Data Warehouse / BOBJ reports will be identified by an asterisk (*) at the end of the report title.
 - Most reports return both a PDF and Excel format when processed. The PDF format is presented in one tab and the Excel format is presented in a separate tab within the same report.
 - Some reports return only one format type when processing because there may be different/multiple filters or sort sequences applied to the data.
 - For reports with only one format type, the format type is included in the report title (e.g., LAS/PBS Budget Report (Excel)*, LAS/PBS Budget Report (PDF)*). These reports only produce the format shown in the report title.
 - If the only difference in the data between the PDF and Excel report is the sort sequence, then only a single tab will be presented in the Excel report. For example, the New Hires Report (PDF)* produces three separate tabs, but the New Hires Report (Excel)* produces a single tab since the only difference between the PDF and Excel is the sort sequence.
 - Once you select the report, a template of the report is presented along with the Prompts screen.
 - Required prompts have an asterisk (*) next to the prompt name and must be completed.
 - Prompts with an  icon require a filter to be entered. Prompts with a check mark  indicate a filter can be entered (or modified if a value has been defaulted).
- **Step 3:** Complete the required prompts and select OK.

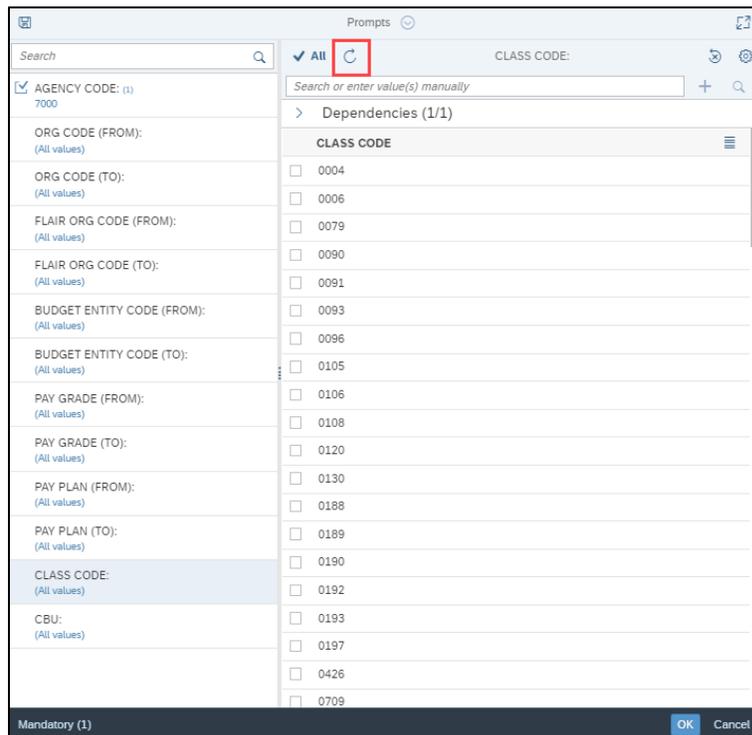
Notes:

- Prompts with an  icon require a filter to be entered.
- Prompts with a check mark  indicate a filter has been pre-populated.

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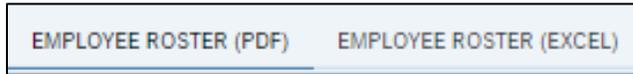
- To select a value from a prompt list, you must select the Refresh Values icon  to display the data filters available for selection. The Refresh Values icon provides the available data filters for the prompt selected. For example, when processing the Average Salary Report and a specific agency is selected in the Agency Code prompt, when Refresh Values is selected on the Class Code prompt, only the class codes used by the agency selected will be presented.



- Click the  button to process the report. The button will not be enabled until all required prompts are completed. A completed report will appear on the screen. To change the data filters and return to the Prompts screen, click the Query  icon located in the top command bar.

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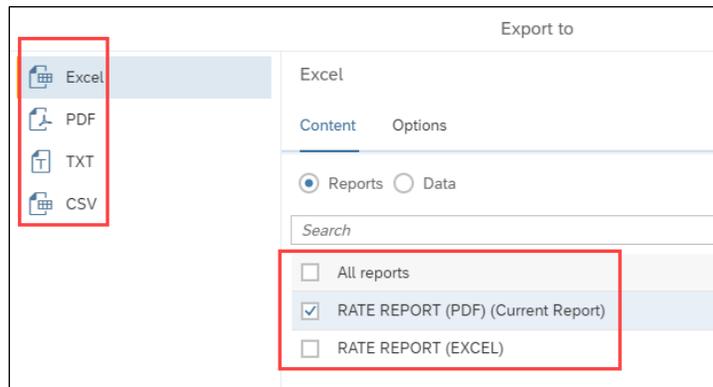
- Reports that execute both the PDF and Excel formats will have two tabs in the top left corner (one for PDF and one for Excel).



- Reports that execute only one output format (either PDF or Excel) and have multiple filters or sort sequences will have multiple tabs in the top left corner. Each tab will indicate the filter type or sort sequence.

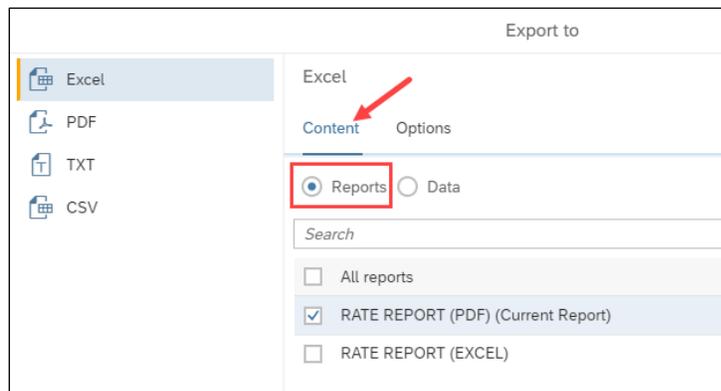


- **Step 4:** Export the report by selecting the Export  icon located in the top command bar. The Export menu will appear.



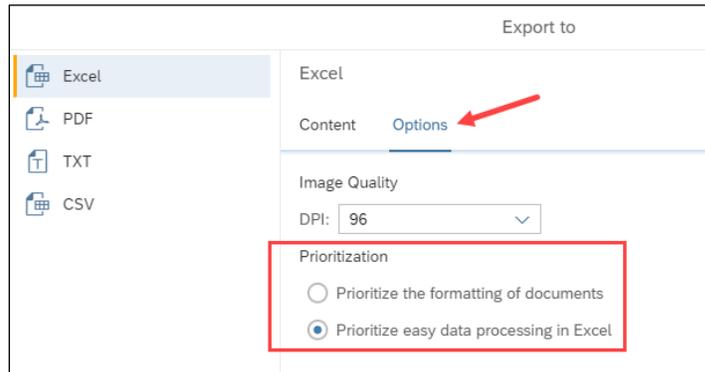
Notes:

- Content Tab – The Reports radio button is the default and should always be selected when exporting data in either report output format (PDF or Excel). All formatting will be lost if the Data radio button is selected.

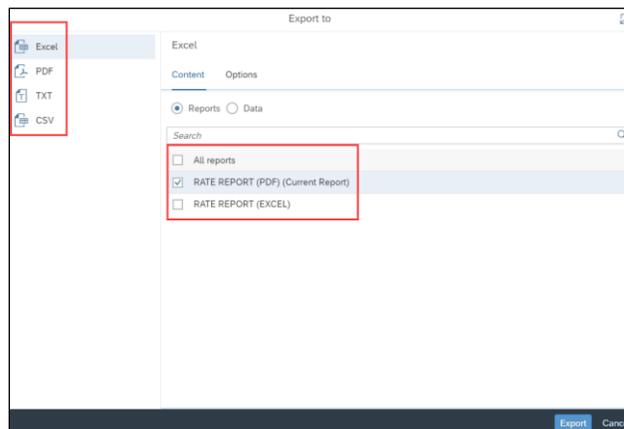


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- Options Tab – Do not change the radio button defaults for “Prioritize the formatting of document” and “Prioritize easy data processing in Excel”, as there is no benefit to changing these options.

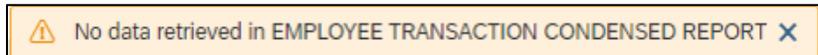


- Step 5:** Select the file type, Excel, PDF, TXT or CSV, and then select the corresponding Report type. Click Export.

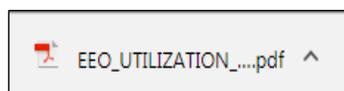


Notes:

- The results may take a while to return depending on the report and the selected filters. While the PDF reports are formatted for printing, the Excel reports are unformatted so that you can work with the data as needed. If there is no data available for the selected report criteria, the screen will return with a message indicating “No data to retrieve in [Report Name].” Click OK and then the Refresh icon to return to the Prompts screen. Re-enter the valid prompt requirements and execute the report.



- Depending on the internet browser you are using, a pop-up box may appear on the screen in different locations to Open/Save the report.
 - Chrome Browser – Bottom left corner of screen.

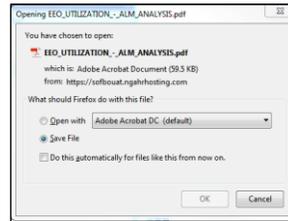


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- Edge Browser – Top right corner of screen.



- Firefox Browser – Middle of screen.



- Most PDF reports are formatted as landscape, letter size.