

**INTRODUCTION
TO
HR CUSTOM REPORTS**

**Training Guide
& Reference**



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ABOUT THIS DOCUMENT

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Purpose: This document is intended to serve as a guide for learning how to use the locally devised system for producing reports from the HR module of Colleague, as a quick refresher and checklist for users, as a reference for programmers or developers making modifications or enhancements, and as a resource for those desiring information about the HR Custom Reports

Target Audience: Human resources personnel, deans, directors and their administrative support staff, and others with access to the college's administrative computer network, the Colleague (R17) application, and the HR Custom Reports menus.

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Introduction

Colleague's query/reporting feature is very powerful in that almost any data can be pulled from the system and displayed on screen or on a report. Power users take advantage of this feature on a daily basis but two very big disadvantages hamper its usefulness to the typical user:

- Access to the colon prompt is required and at HCC the typical user does not have such access.
- Even if the user has colon prompt access, detailed knowledge of the query language and the structure and content of the data are required.



The QueryBuilder is a user-friendly tool that may be used to construct queries. However, to customize it or to pull data from more than one file, the user must possess some advanced technical skills.

HR Custom Reports (HRCR) is a structure for allowing the typical user to obtain the most commonly requested HR data without having to request it from HR or resorting to writing their own queries. This is accomplished through a series of menus which call prewritten reports. In many cases the user is able to tailor the content of the reports by specifying that data meet certain criteria in order to be included. This tailoring is sometimes done for individual reports and sometimes by creating saved lists.

The HR Custom Reports feature itself uses Colleague's built-in query feature. While powerful in operation, the appearance may seem stark and much less user-friendly than Wintegrate screens. Never-the-less, with patience, careful entry of keystrokes, and some familiarity with the data, users will find the feature quite handy.

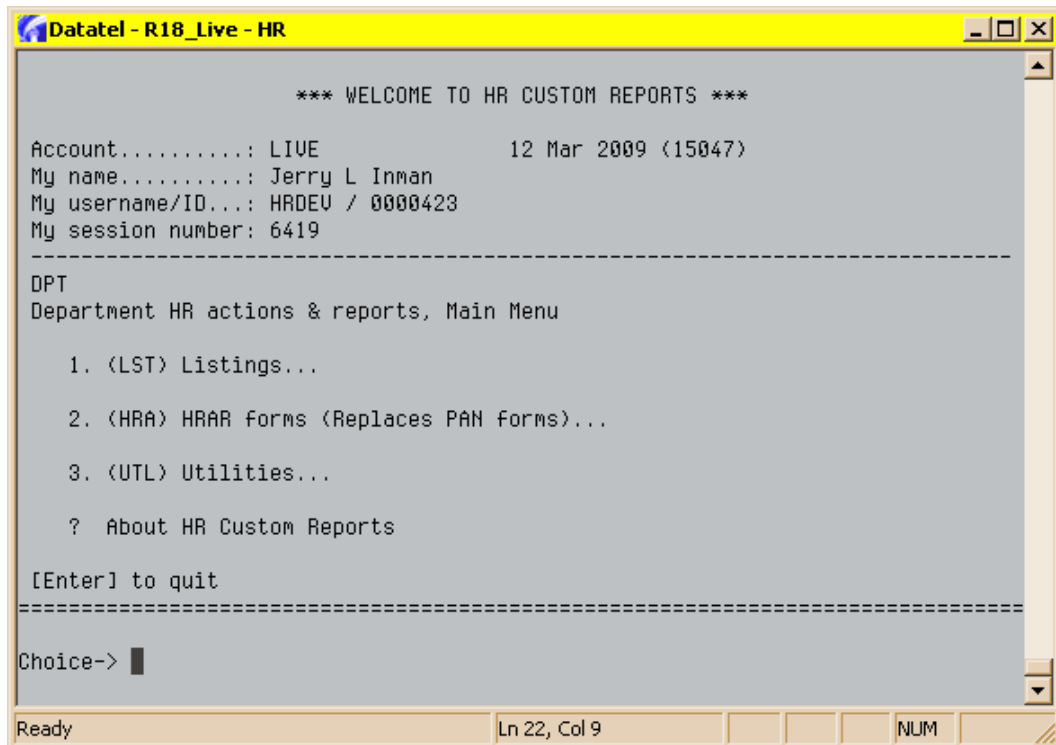
To use the HR Custom Reports feature, the user must have access to Colleague's HR module . This is generally accomplished by requesting two HR security classes, typically HR.CAMPUSINQ and XHR1 or XHR2, from the HR system agent. When access has been obtained the user accesses the HR menus by typing in HR- at their regular Wintegrate menu. The XHR1 or XHR2 option, as appropriate, should appear on the menu.



*XHR1 is designed for users **in** the HR office while XHR2 is designed for users **outside** the HR office.*

Components Collectively Referred to as the System	
Colleague	College-wide software published by Datatel to assist HCC in managing Student, Financial and Human Resource information.
HR Custom Reports (HRCR)	A system of locally produced menus and reports utilizing the Colleague database but not the Wintegrate interface.

Menus



```
*** WELCOME TO HR CUSTOM REPORTS ***
Account.....: LIVE           12 Mar 2009 (15047)
My name.....: Jerry L Inman
My username/ID...: HRDEV / 0000423
My session number: 6419
-----
DPT
Department HR actions & reports, Main Menu

  1. (LST) Listings...
  2. (HRA) HRAR forms (Replaces PAN forms)...
  3. (UTL) Utilities...
  ? About HR Custom Reports

[Enter] to quit
-----
Choice-> █
```

Ready Ln 22, Col 9 NUM

The opening menu is a little different from those that follow in that some system information is displayed.

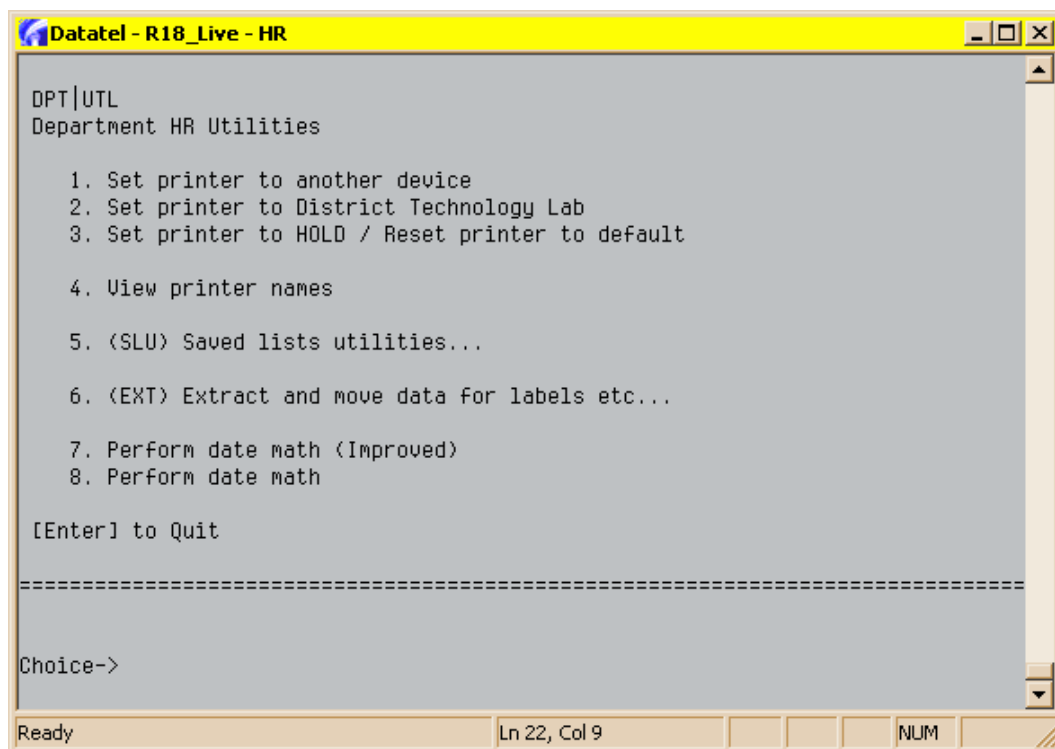
- The top line on the opening menu shows the account in use. Normally, reporting is done from the Live account.
- The second line shows your username. This is how you are known by Colleague and HR Custom Reports.
- The third line shows your session number. This is a number automatically assigned each time you log on the system and the number you can use to kill your session if for some reason it hangs.
- The fourth line shows today's date in the normal way and the way Colleague stores that date internally. Some older HR Custom Report features require dates be entered in internal format.

The remainder of the screen shows the options available to the user. The menu ID and menu name appear on the next two lines. Options with an asterisk (*) are under construction and not yet operational.

When you see “Choice ->” with the cursor flashing after it, it means you are being prompted to enter your menu choice. While in HR Custom Report screens the mouse has limited use. Prompts cannot be answered with the mouse. Instead, you must press the desired key to make a selection.

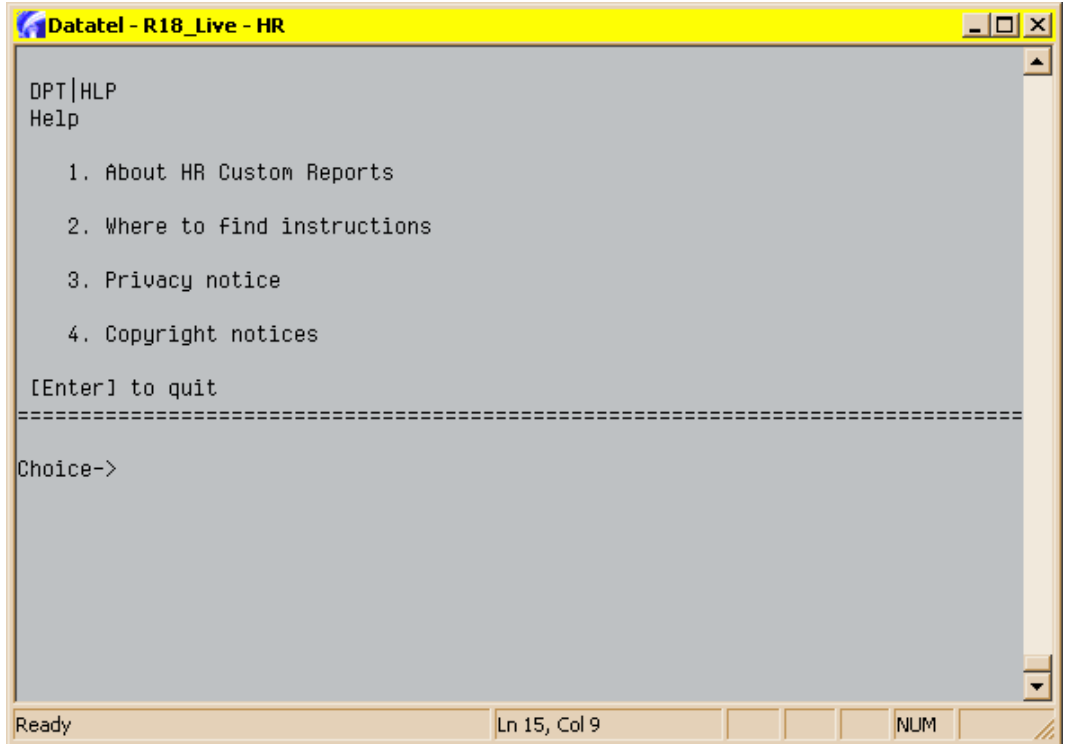
A menu option with trailing dots such as List... means that option will take you to another menu. Otherwise, choices generally take you to a particular report or process.

A typical menu



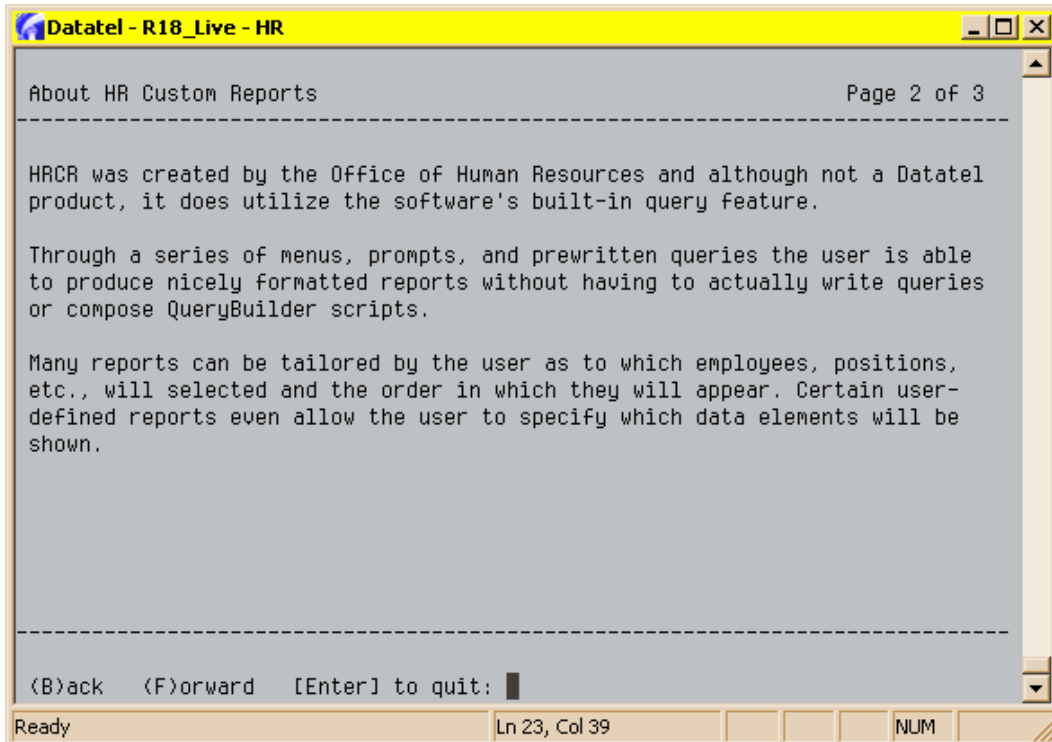
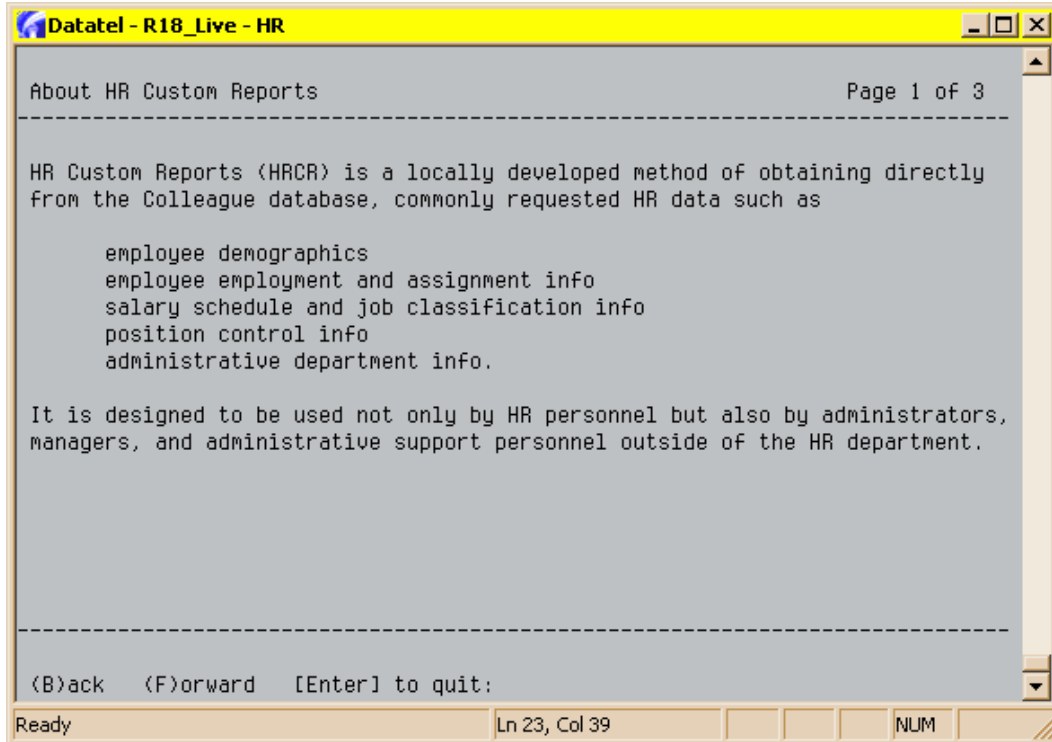
Help Screens

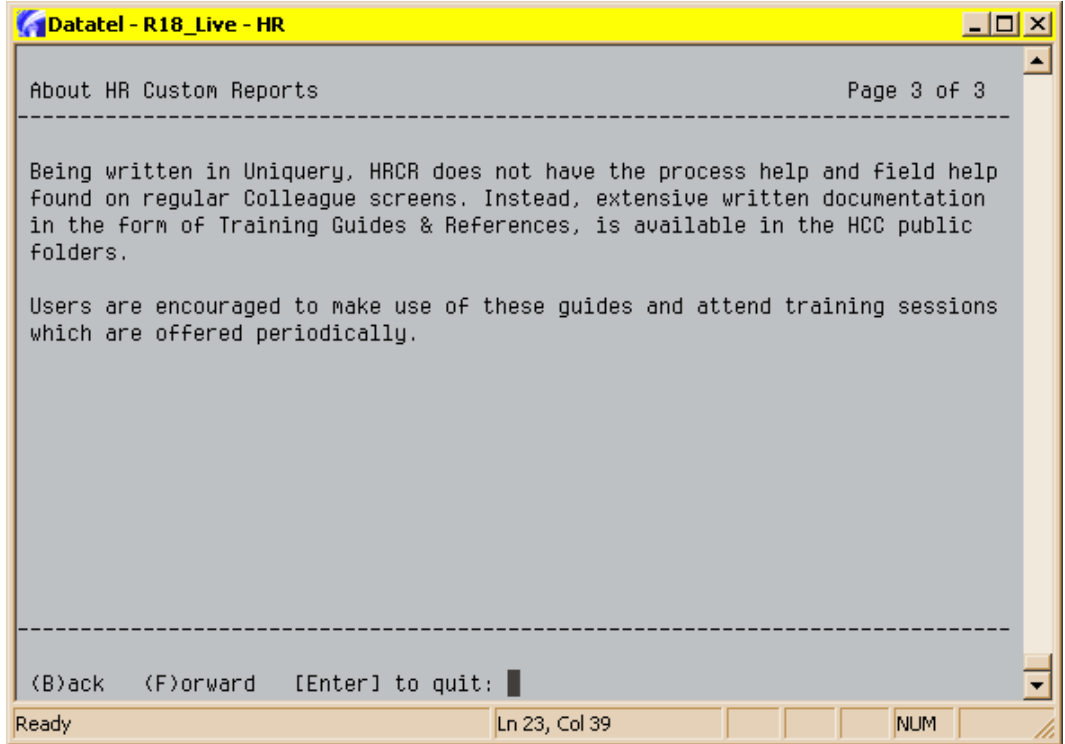
From the main menu the “?” option takes you to the main help menu.



About HR Custom Reports

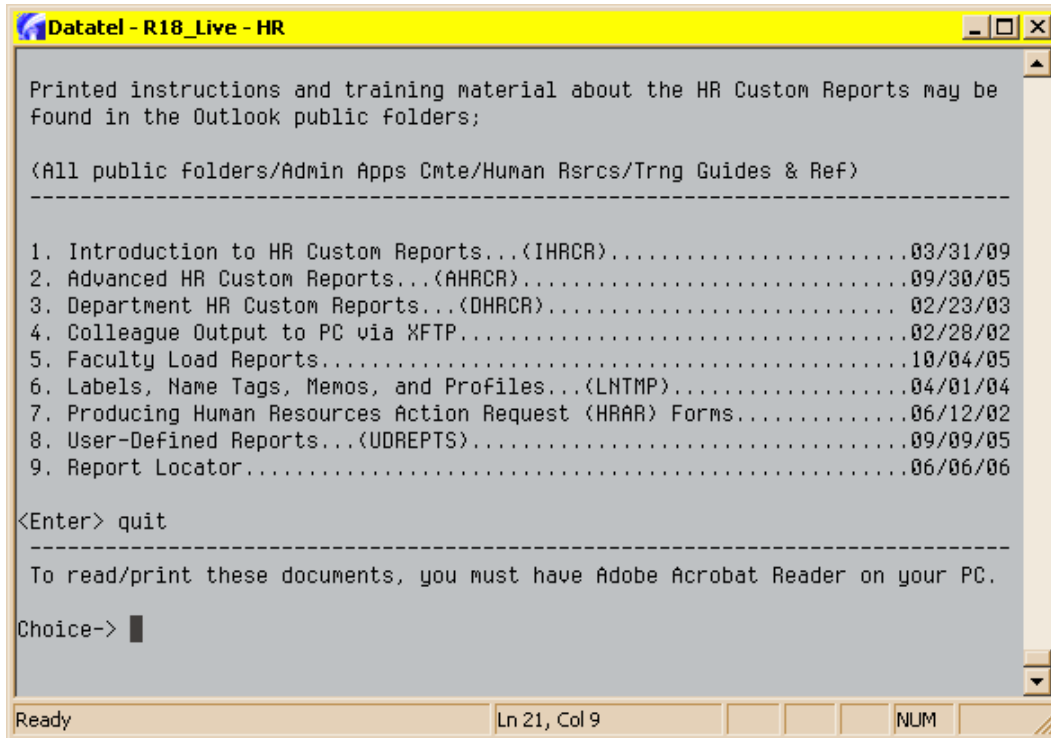
Here is general information about HR Custom Reports.





Where to Find Instructions

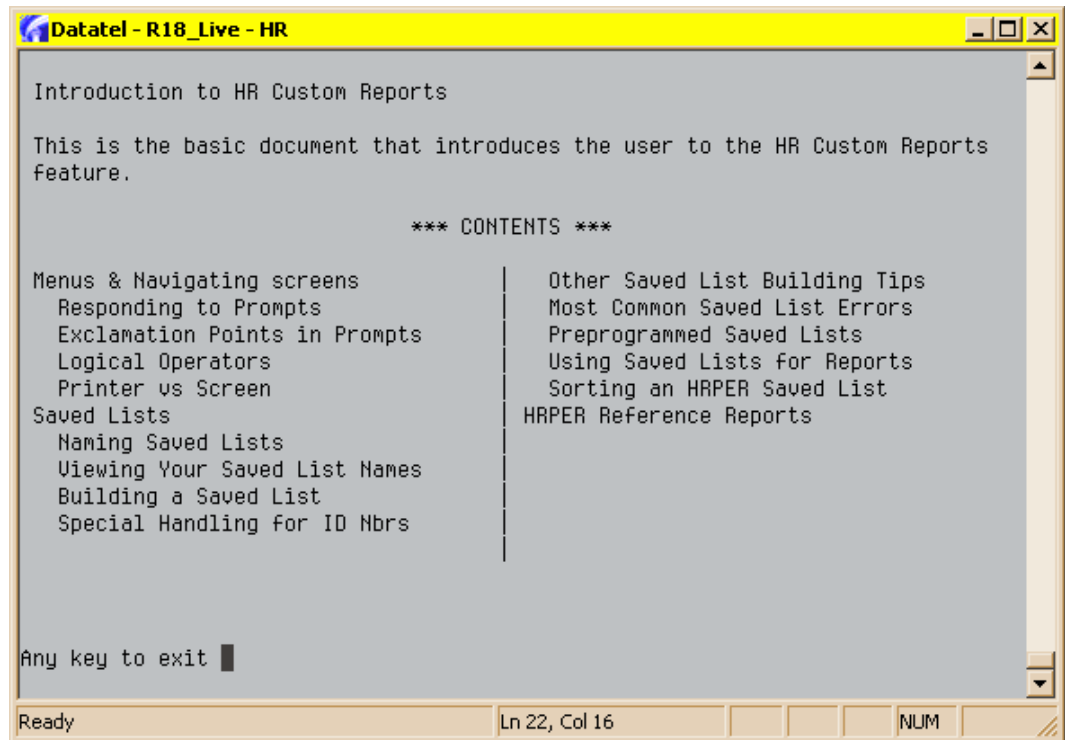
Here you will see a listing of documents pertaining to HR Custom Reports, the date of the last revision, and where they may be found. The document you are reading now is the first on the list.



Consult this screen periodically to see if a document of interest to you has been recently revised. (Note: The dates shown above were current as of the publication of this guide.)

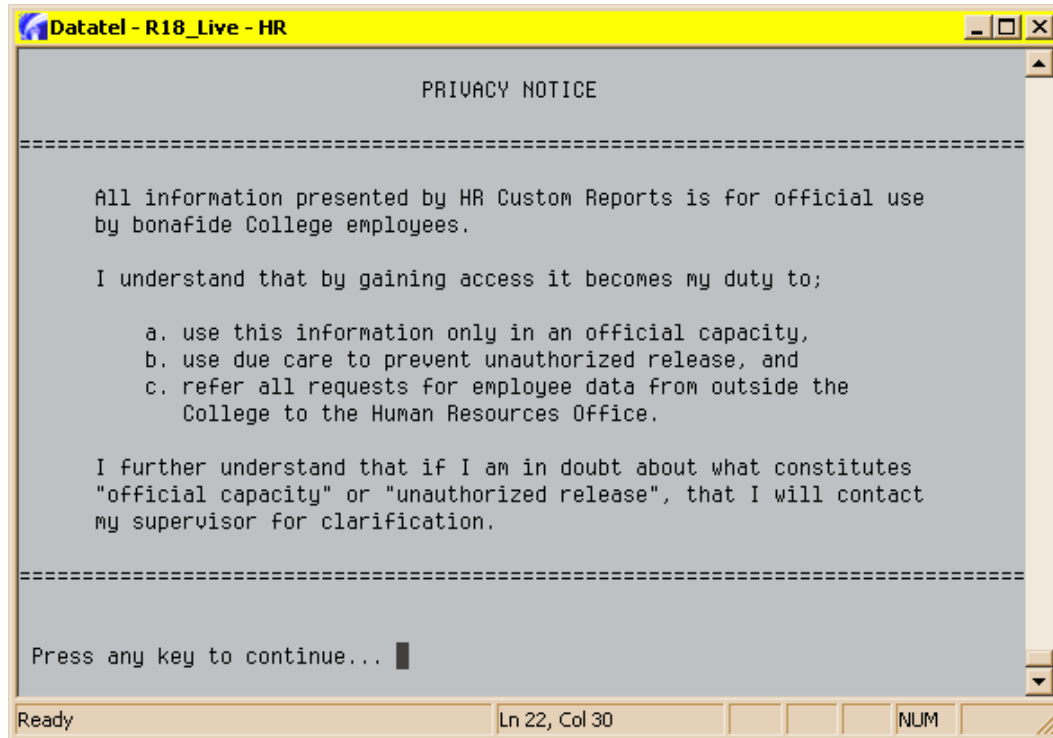
As indicated above all the documents listed may be found in the Outlook public folders.

By selecting the number beside an option, additional information about that document is displayed



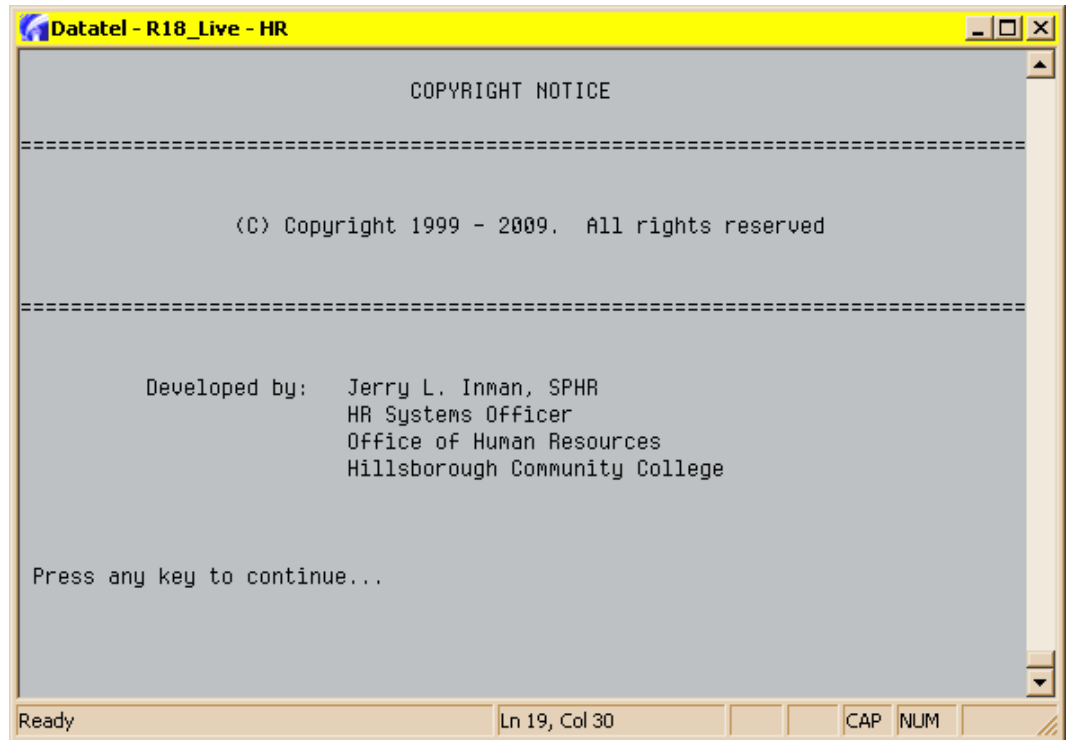
Privacy Notice

This is the same notice that appears when you first enter HR Custom Reports, but since you are already in you are asked only to press any key to continue.



Copyright Notices

This shows information about copyrights and the developer of HR Custom Reports.



Reports

Most reports allow the user to tailor the report's content by specifying that data meet certain criteria in order to be included. For example, a user may want position data only on those positions assigned to his/her own department rather than have all positions in the College show up. This is accomplished by prompting the user to input the desired department code at the time the reports is called. The system would then produce the report with only those positions whose POS.DEPT data matched what the user stipulated.



For any given report, the criteria which may be specified by the user was determined at the time the report was programmed and cannot be changed.

Responding to prompts

If the prompt includes the word “**like**”, it is generally best to always enter three dots (called an ellipse) somewhere within your input (for example: FT...), or by themselves (for example: ...). Entering text without the dots may cause the query to fail. Pressing the <Enter> key without entering any text, may or may not cause the query to fail. Sometimes, it will cause records which have a blank, or null value, in the field, to be selected.

Multi-valued prompts If, after making an entry at a prompt, the cursor bounces back to the beginning of the input area, it means you may make another input for the same prompt. The text of your previous input still shows but you do **not** need to erase it – simply type over it. This is called a multi-valued prompt. The system will accept a series of inputs and treat them as if the logical “OR” appears between them. For example, if “FT” <Enter> and “PT” are entered, the system will select records that contain the values “FT” or “PT”. Don’t forget to add the “...” after each entry if the prompt contains the word “like”.

After your last input for a multi-valued prompt, press the <Enter> key. That will tell the system there are no more inputs for that prompt. All of the entries you have made to that prompt will be displayed as one string of text.

At prompts instructing you to “To expand, enter DBL.SPC:” you may cause printed output be double spaced by typing in the phrase DBL.SPC

and pressing <Enter>. Pressing <Enter> by itself causes single-spaced output.

The system generally is case sensitive. If a prompt presents an example of acceptable input with upper case characters, then you should enter only upper case.

Most processes and reports allow the user to cancel out at any prompt and start over by entering an exclamation point (!). Screens that have this feature are recognizable by the exclamation point at the extreme right of the screen

```
===== !
As a starting point, use this HRP list (Optional, [Enter] for none).
:
Name for new HRP saved list ([Enter] to cancel).
:: hrp.temp

ID number (all 7 digits) like:=...
HR status like.....:
```

A screenshot of a terminal window showing a menu of options. At the top, a dashed line is followed by an exclamation point. Below this are several prompts for user input. A callout box with an arrow pointing to the exclamation point contains the text: "Means '!' entered at prompt will restart process".

At prompts instructing you “To print, enter LPTR:” you may send the output to your network printer by typing in the letters LPTR and pressing <Enter>. You may send the output to the screen only by simply pressing <Enter>. For tips about this see **Printer vs Screen**.

```
Enter header message: EXAMPLE
To print enter LPTR.:                               My printer is gk_216_c
```

Along side the “To print, enter LPTR:” prompt the screen for some reports show the name of the user’s default printer. Please note that if the default printer is changed inside Colleague or inside HR Custom Reports, this screen notice does not get updated.

Logical operators often seen in prompts

	<u>Generally means</u>	<u>For dates, it means</u>
GT	Greater than	Later than (after)
GE	Greater than or equal to	On or after
LT	Less than	Earlier than (before)
LE	Less than or equal to	On or before
EQ, =	Equals	Equals

IMPORTANT

When prompted for values there are no help screens to allow you pick from a list. You must know, beforehand, what values you want to input. Therefore, it is highly recommended that you print out and keep handy, the most commonly used HR codes.

Printer vs Screen

If a report is sent to the screen, chances are it will scroll up and away faster than anyone could possibly read it. Not to worry – it's still there.

UI

The User Interface (UI) has a vertical scroll bar built in.



If you are producing a report for the first time and are unsure of the results of your select criteria, it is a good practice to first send it to the screen. A five-hundred page report sent to the screen wastes no paper.

But...

If you accidentally send a monster sized report to a printer and want to cancel the job, all is not lost. Most modern printers allow job cancelling via the front panel controls. Try that first.

If that does not work, call IT (7705), identify yourself to the helpdesk attendant, and ask that your print queue be zapped. This will also cancel any other jobs that you have sent to a network printer.

Meanwhile, the printer has probably stored scores of pages in its internal memory and will continue to pump out pages. As a last resort, switch off power to the printer, wait long enough for IT to cancel your job, (usually just a couple of minutes) then switch the power back on. You will probably have to clear a paper jam.



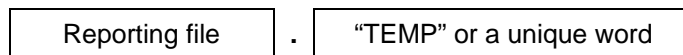
Saved Lists

A saved list is merely a list of record ID's. When a report (or any process, for that matter) is run with an active saved list, only those records whose ID's are in the saved list will be included. The HR Custom Reports feature uses saved lists for two reasons:

- It enables you to set up the selection criteria once and produce multiple reports from it
- It allows you to set up the selection criteria once and produce the same report over and over with the same content.

Naming saved lists. Since you may have several saved lists all at one time it is important that you create names for them that not only distinguish them from one another, but are meaningful to you as well.

Pick a naming convention and stick with it. We recommend this structure that reveals **source**, and **uniqueness**.



Part of the name should indicate the primary reporting filename or abbreviation, such as HRP (for HRPER). Because the record IDs are different in each file, a saved list for one file, such as POSITION, will not work for another file such as HRPER. Although not technically necessary, coding the reporting file into your saved list name may eliminate some confusion, especially if you deal with a lot of saved lists.

Some commonly used HR files	
HRPER	<i>HRP</i>
POSITION	<i>POS</i>
STIPEND	<i>STP</i>
PERSTAT	<i>PST</i>
PERPOS	<i>PP</i>
PERPOSWG	<i>PPWG</i>
POSPAY	<i>PPY</i>

Another part of the name should be something unique to that saved list if you wish to use it for more than one occasion. The current date is generally specific enough for this purpose. You could also add the time of day.

Examples: PPWG.020202, PPWG.2FEB02.1045

If there is no need to keep the saved list around after it is used, this part of the saved list name can be some generic term such as "TEMP". Then,

you can use the same name over and over. Each time that particular name is used, the existing saved list will be overwritten with new content. This is encouraged by the Information Technology (IT) folks since it keeps one-time-used saved lists from cluttering up valuable disk space.

Examples: HRP.TEMP, PPWG.X, POS.MISC

All Colleague saved lists are stored in the same place. The only thing that distinguishes your saved lists from those created by other users is the name. If someone else were to create a saved list and use a name you had already given to one of your saved lists, yours would be obliterated. Therefore, your saved list names should be unique to you. To aid in creating user-specific saved list names, HR Custom Reports (HRCR) automatically supplies a *third* part – your username – to the name you provide.

**Saved lists are
PRIVATE
in HR Custom
Reports!**

Any time you are in HR Custom Reports and supply a name for a new saved list, your username and a period will be prefixed to it. Since the username is always unique to the user, any saved list bearing the username as part of its name, will be different from other users' saved list names.

Citing the examples above, and assuming your name to be R. Smith, the actual names stored in the system would be:

RSMITH.PPWG.O2O2O2, RSMITH.PPWG.2FEB02,
RSMITH.HRP.TEMP, RSMITH.PPWG.X, and
RSMITH.POS.MISC

The system treats upper and lower case letters as different characters. Some users may consider RSMITH.HRP.TEMP to be the same as rsmith.hrp.temp but the system does not. To simplify matters for the users, any lower case letter entered at a saved list name prompt will be converted to upper case by HR Custom Reports. You can mix case all you want. For example:

hrp.temp will be taken as RSMITH.HRP.TEMP

\$\$

Saved lists are routinely deleted by the System Administrator when they become six months old. This prevents the system from becoming clogged with old saved list that are no longer wanted.

There may be times, however, when you need to keep a saved list longer than six months. You can do this by including in the name the characters "\$\$". This double dollar sign will spare it from the automatic deletion process.

Typical saved list names might be:

HRP.\$\$2005
POS.ADDED.\$\$
CLS.\$\$

Of course your username (RSMITH for example) will be prefixed to whatever name you give it.

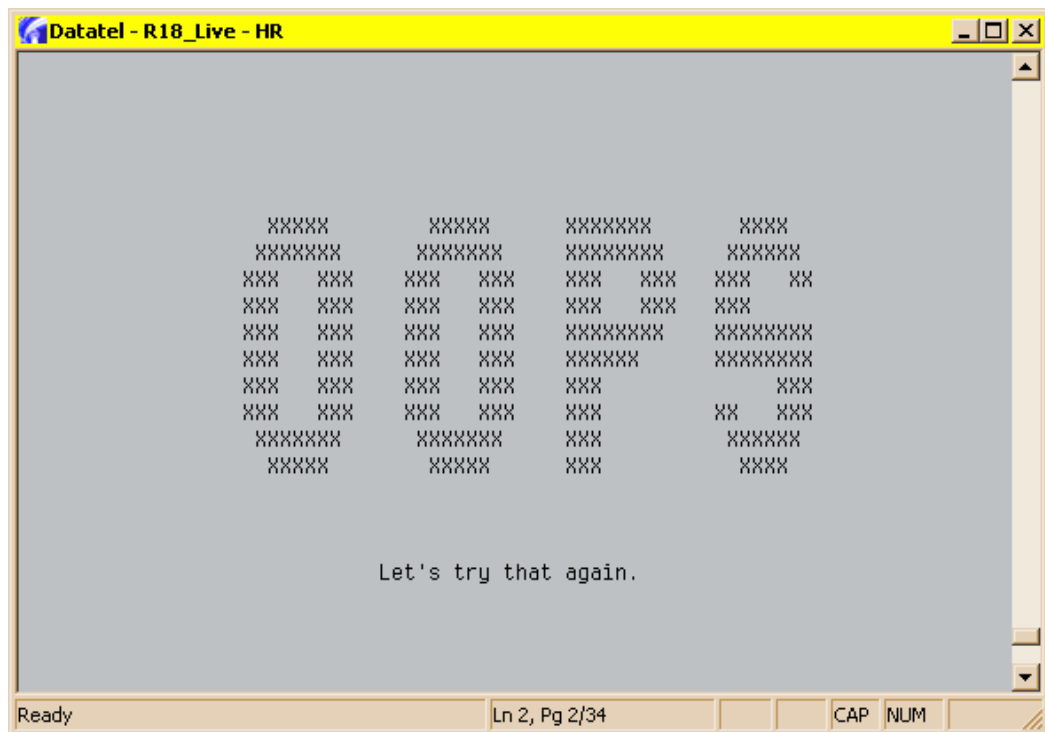


Because \$\$ saved lists are not automatically deleted after six months, the burden of managing those lists and deleting them when no longer needed rests entirely with you.


Oops and !

Backspacing to fix errors when naming a saved list generally is not a good idea. The name that the system ends up storing usually is not what you think it is. Consequently, you may have trouble finding it later. Never trust a saved list created with a typo correction in the name.

When you see that you have made a mistake entering a name for a new saved list (but before you have hit <Enter>) you can cancel out of the process by entering “oops” as part of the saved list name. When HRCR detects these characters in a name it knows you have goofed. Otherwise, your best bet then is to enter an exclamation point (!) at a following prompt which will start the process over.



If all else fails and the system creates a saved list with an bogus name, no big deal – just do it again with a good name.

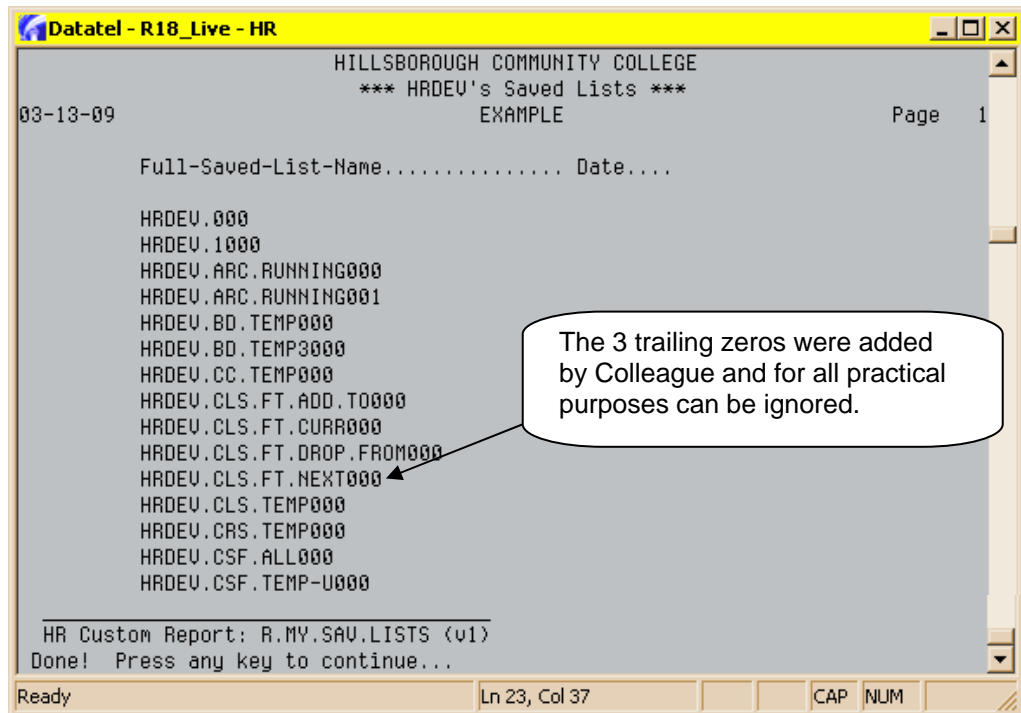
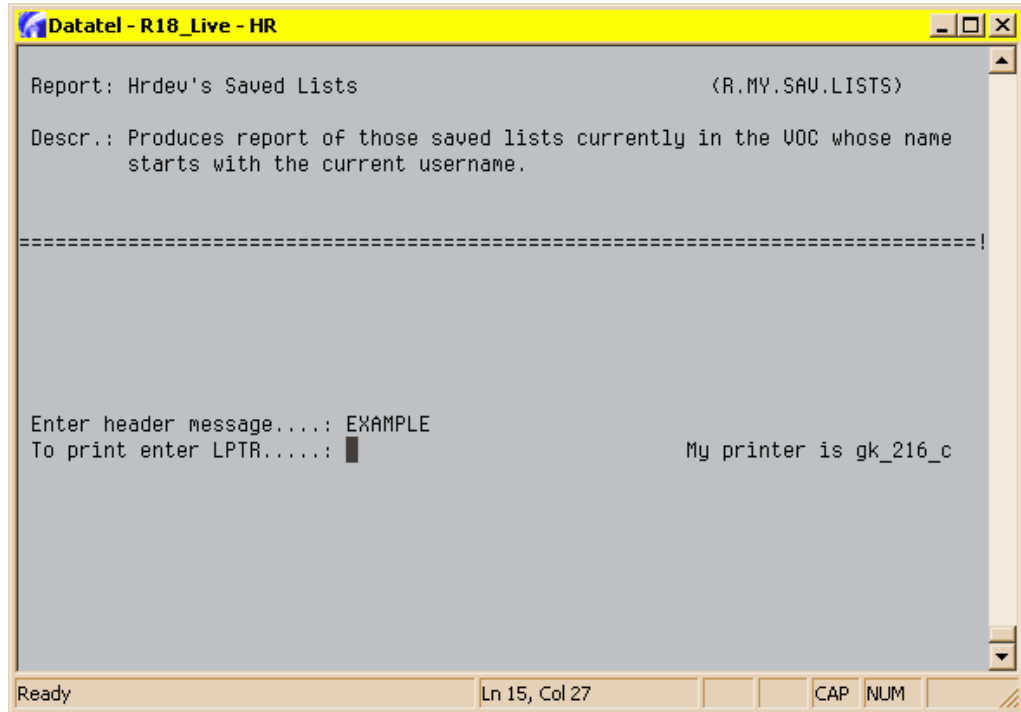
Special characters in saved list names		
OK	OK but <i>not</i> recommended.	 Not acceptable
. _ -	! @ \$ % ^ & * :	# \ / < > () = { } [] ? ; ~ " ' `

Other naming rules. Saved list names can contain both alphabetic and numeric characters, but the first character must be alpha. Since HR Custom Reports automatically prefixes saved list names entered by the user with the username (which always starts with an alpha character) you need not worry about that.

You do not need to add your name, initials or any other personal distinguishing phrases to your saved list names when you create them or when you use them!

Viewing your saved list names

If you have forgotten what you named a saved list you can view the names of all the saved lists you currently have in the system.



Building a saved list

General information about employees may be obtained from the HRPER file so we will use a HRPER saved list process as an example of building a saved list. Other saved lists are created in essentially the same manner.

Saved list builders always identify the primary reporting file, i.e., the file which contains the data. You can abbreviate the file name if you wish, such as HRP for HRPER, POS for POSITION, PP for PERPOS, or PPWG for PERPOSWG.

The user is always prompted for a name by which the system can identify the list. Entering a null value (pressing the <Enter> key) instead of a name will cancel the operation. If a typing error occurs it is advisable **not** to backspace to make corrections. Instead, leave the error just as it is and then enter “oops” as part of the name. That will start the operation over and the user can re-enter the saved list name correctly.

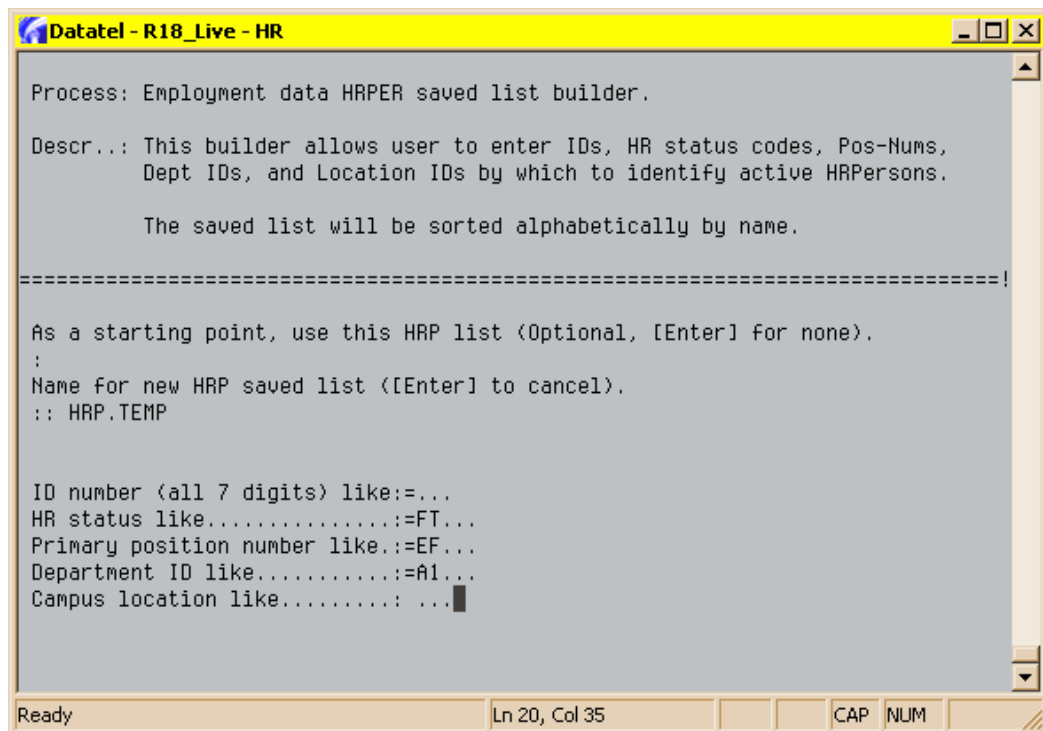
One-at-a-time, Colleague will prompt the user to enter data for criteria. The user enters one or more values at each prompt. An exclamation point (!) entered at any prompt will start the operation over.

Criteria in this HRPER saved list builder

At one time, the standard HRPER save list builder in HR Custom Reports had twelve criteria for which the user was prompted. That process has now been broken down into three separate builders.

By picking the builder that has only the criteria important to the user's selection saved lists can be build relatively quickly. Should desired criteria appear on different builders, the user can build one, then use that saved list as a starter list for a second one.

Employment data HRPER saved list builder



ID number:

The person's ID number (which is the same in the PERSON and the HRPER file) is completely unique. By entering such a number here reports can be limited to a specific person. By repeatedly entering ID numbers, reports can be limited to a very specific group of persons. The person ID must have 7 digits. Numbers such as 442 must have 0's (zeros) prefixed to make the total length equal seven (0000442). If persons for the report are not to be identified individually then the

ellipse (...) should be entered to select all. If one or more ID numbers are entered here, the prompts for the remaining criteria are skipped.

HR status:

The HR status (stored in the PERSTAT record) is what tells us if a person is full-time (regular or temporary), part-time (regular or temporary), or on a leave of absence. If the person is not in one of those statuses he/she is not a current employee. If only the ellipse (...) is used here, all employees, past and present will be included unless excluded by some other criteria. If you enter nothing here <Enter>, then only NON-current employees will appear - so be careful.

Primary position number:

Every current employee has a primary position number. Since persons assigned a position take on the attributes of that position, setting up criteria based on the position allows us apply that criteria to any person in that position.

The position number itself, carries a good bit of information. The first digit describes the category – administrator, faculty, etc. The second digit reveals whether it is full-time or part-time. The third digit indicates whether the position is covered by the Florida Retirement System or not. For most categories, the fourth digit is the grade. Recently created temporary positions carry a T in the fifth digit. The remaining digits are strictly sequentially assigned numbers. For adjunct faculty, the fourth digit indicates whether they teach credit or non-credit courses.

The position number duplicates the HR status in the full-time/ part-time arena, and is a quick way to distinguish between them. However, it is not a reliable means for distinguishing temporary from regular. If this criteria is not important to the report, use the ellipse (...) to select all.

Department ID:

Employees are assigned to an administrative department by way of their primary position number. Since the department numbering scheme is hierarchical, use of the ellipse (...) is handy at pulling out all of the subordinate departments under a parent department. For example: Entering A013...will cause departments A0130, A0131, A0132, A0134, and A0135 to be selected. If this criteria is not important to the report, use the ellipse (...) to select all

Campus location:

Every position is assigned to a location which correlates to an HCC campus. By entering A1... all the positions (and by extension, the employees) located at Dale Mabry could be selected. If this criteria is not important to the report, use the ellipse (...) to select all.



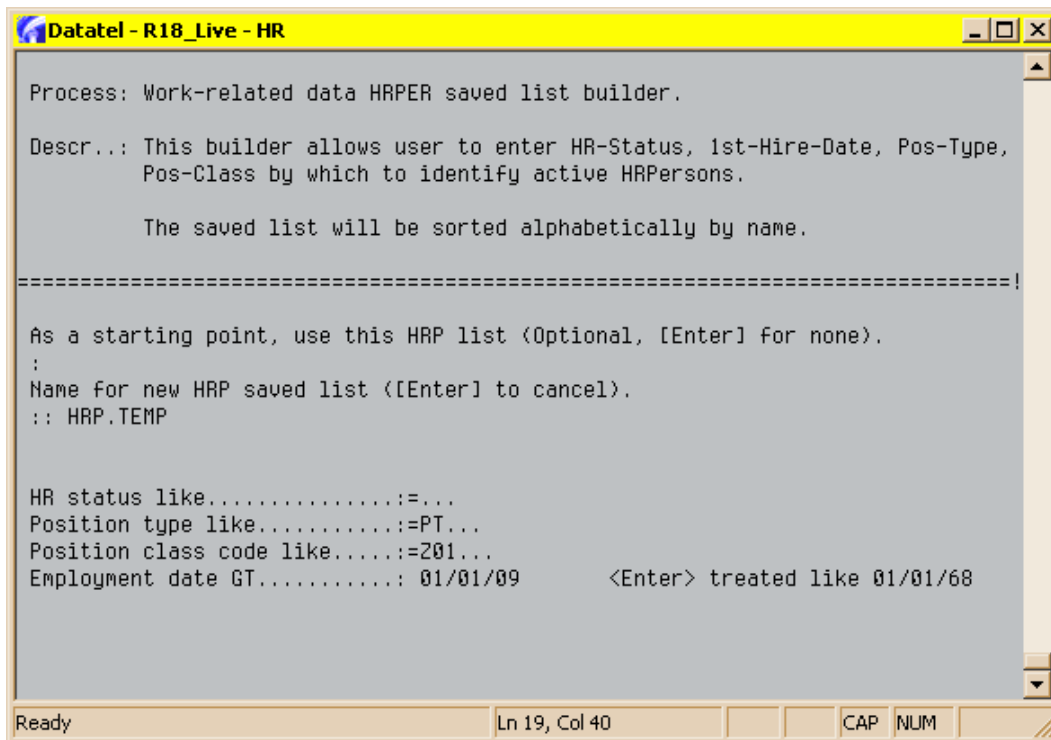
Please note that this data element is not the same as the locator campus data element. That data is provided by the employee an/or the supervisor and is not tied to the position. However, generally the two should agree.

Special handling for ID number selection

If the user enters one or more IDs at the prompt, HRCR will not prompt for the remaining criteria. This is because the ID is the most restrictive criteria that can be set for the PERSON or the HRPER file. When one or more IDs have been entered, no data entered for any of the remaining prompts could possibly limit the selection any further, Therefore, those steps are skipped.

```
Datatel - R18_Live - HR
Process: Employment data HRPER saved list builder.
Descr...: This builder allows user to enter IDs, HR status codes, Pos-Nums,
          Dept IDs, and Location IDs by which to identify active HRPersons.
          The saved list will be sorted alphabetically by name.
=====!
As a starting point, use this HRP list (Optional, [Enter] for none).
:
Name for new HRP saved list ([Enter] to cancel).
:: HRP.TEMP
ID number (all 7 digits) like:=0000423
Since ID is the most restrictive criteria, no other criteria
is appropriate.
1 IDs saved to HRDEV.HRP.TEMP
Press any key to continue...
Ready                               Ln 22, Col 30                       CAP NUM
```

Work-related data HRPER saved list builder



HR status:

The HR status (stored in the PERSTAT record) is what tells us if a person is full-time (regular or temporary), part-time (regular or temporary), or on a leave of absence. If the person is not in one of those statuses he/she is not a current employee. If only the ellipse (...) is used here, all employees, past and present will be included unless excluded by some other criteria. If you enter nothing here <Enter>, then only NON-current employees will appear - so be careful.

Position type:

The position type can be used to distinguish those in temporary (FTT, PTT) positions, from those in regular (FTR, PTR), positions, and with-benefits (FTT) from without-benefits (FTTX). It can also be used to pick out student assistants (PTSA) and college work study student employees (PTCW). If this criteria is not important to the report, use the ellipse (...) to select all.

Position class:

Every position is assigned a classification. At HCC, all full-time position classifications are coded with the class code, a 5-digit number. (The classification numbering system for part-time positions does not conform to the full-time system and is not used in Colleague.) This criteria is useful if you want to pull out say, all senior staff assistants. Entering the class code N1007... will accomplish this. If this criteria is not important to the report, use the ellipse (...) to select all.

Employment date:

The employment date criteria is useful in identifying those who have been hired since a particular date. Employees will be included if their Effective Employment Date is **after** the date input here. The date must take the form MM/DD/YY, for example: 10/18/99. Do not use quotation marks or the ellipse(...).

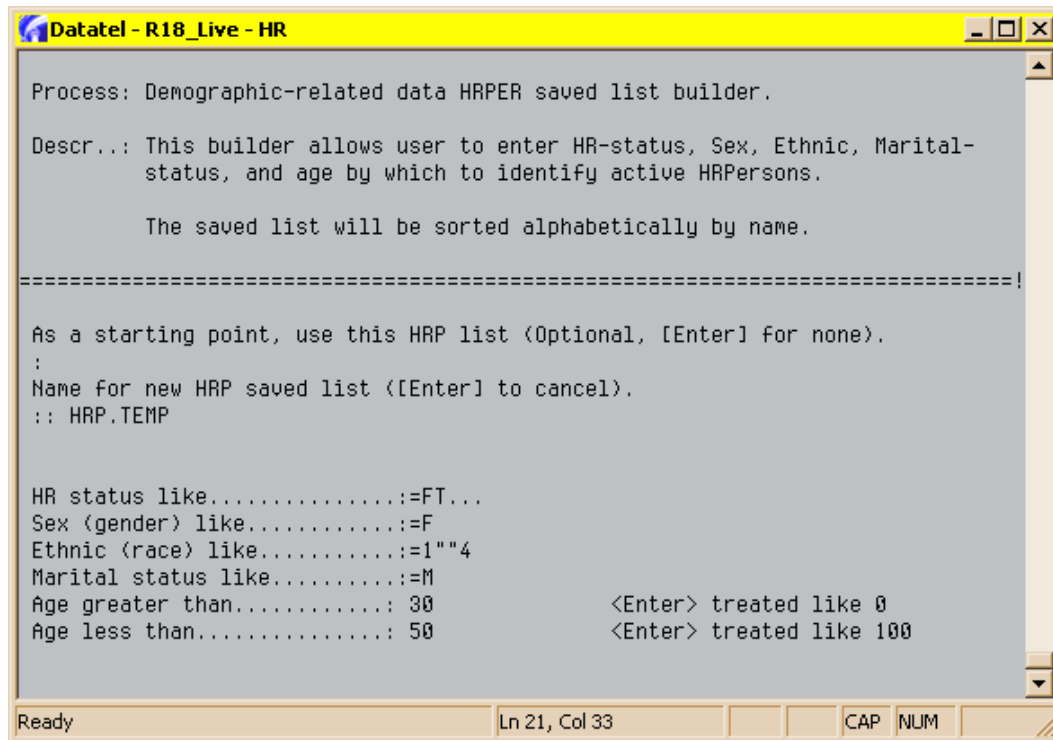
A date must be entered here for the process to be successful. If this criteria is not important to the report, enter a very old date such as 01/01/68, to select all.

This particular SL builder allows the "Enter" key stroke to be interpreted as 01/01/68.

```
Position class code like.....:=Z01...
Employment date GT.....:          <Enter> treated like 01/01/68
```

If this is not shown on the screen, a date must be entered.

Demographic-related data HRPER saved list builder



```
Datatel - R18_Live - HR
Process: Demographic-related data HRPER saved list builder.
Descr.: This builder allows user to enter HR-status, Sex, Ethnic, Marital-
status, and age by which to identify active HRPersons.
The saved list will be sorted alphabetically by name.
=====!
As a starting point, use this HRP list (Optional, [Enter] for none).
:
Name for new HRP saved list ([Enter] to cancel).
:: HRP.TEMP
HR status like.....:FT...
Sex (gender) like.....:F
Ethnic (race) like.....:1""4
Marital status like.....:M
Age greater than.....: 30          <Enter> treated like 0
Age less than.....: 50           <Enter> treated like 100
Ready                               Ln 21, Col 33          CAP NUM
```

HR status:

The HR status (stored in the PERSTAT record) is what tells us if a person is full-time (regular or temporary), part-time (regular or temporary), or on a leave of absence. If the person is not in one of those statuses he/she is not a current employee. If only the ellipse (...) is used here, all employees, past and present will be included unless excluded by some other criteria. If you enter nothing here <Enter>, then only NON-current employees will appear - so be careful.

Sex/gender:

Only two codes go here, M or F. If this criteria is not important to the report, use the ellipse (...) to select all.

Ethnic:

This is the data element that reflects the employee's ethnic/racial designation. If this criteria is not important to the report, use the ellipse (...) to select all.

Marital Status:

Typical values are **M** for married, **S** for single, **D** for divorced, and **P** for separated. If this criteria is not important to the report, use the ellipse (...) to select all.

Age greater than:

A number entered here selects those whose current age is greater than that number. Pressing <Enter> here, instead of a number has the same effect as if 0 (zero) has been entered. Do not use the ellipse.

Age less than:

A number entered here selects those whose current age is less than that number. Pressing <Enter> here, instead of a number has the same effect as if 100 has been entered. Do not use the ellipse

In the example above, those aged 31 through 49 will be selected.

When the last criteria has been entered, the system searches the reporting file and finds all the records whose data match all the criteria the user has defined. In this case, the system reported that 36 HRPER records were found.

```
65 records selected to list 0.  
65 IDs saved to HRDEV.HRP.TEMP  
Press any key to continue... █
```

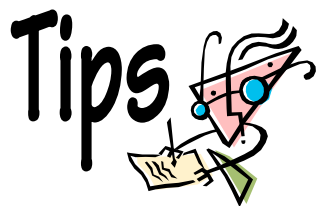
Internally, lists may be assigned to an area numbered 0 thru 9. This is of no consequence to the user and may be ignored.

Saved lists built here will always be sorted alphabetically by name.

Other tips for building saved lists.

Know the codes you wish to use before you start building a saved list. Print out the codes from the tables you use most often and keep them handy.

If you make a mistake while entering codes, generally the safest bet is to enter a ! which lets you start over. Backspacing to correct input errors may appear on screen to be ok when in fact it is not.



You need not enter codes for every criteria – just the ones that help you define the group of records you want in the report. For those other criteria with the word “like” in the prompt, just enter the ellipse (...).

Be careful when inputting a null value (Pressing <Enter> instead of inputting a code).

Sometimes it selects the record if that field is blank. Sometimes it causes the process to fail.

You should **not** trust a saved list built on criteria in which you made corrections during entry.

If you enter a person’s ID you need not enter any other criteria. That is the most restrictive of all criteria.

Most common errors in building any saved list.

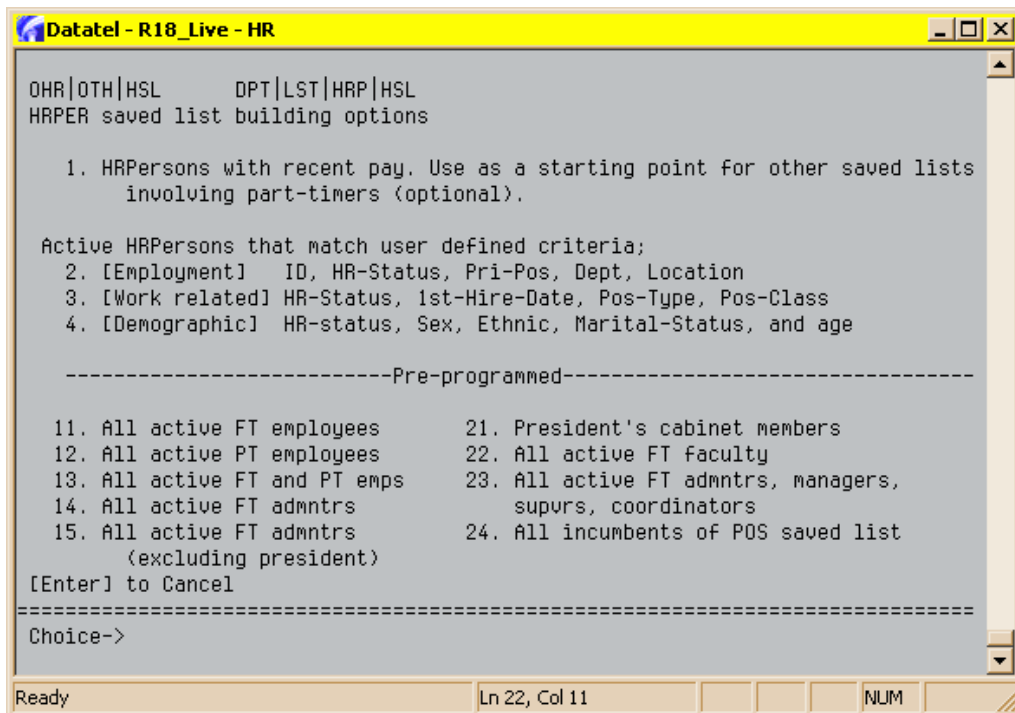
- Giving it a name slightly different that what you intended - then not being able to recall what it was. Remember, Colleague is very CASE sensitive. VSMITH is very different from vsmith.
- Not using the ellipse (...) when the prompt has the work “LIKE” in it.
- Backspacing or otherwise making corrections that appear to be ok but aren’t.
- Setting up two or more conflicting criteria which no record can possibly match.

- Using codes for a criteria that apply to another criteria.
- Using an incorrect or inappropriate “starter” saved list.

“No records found” does not necessarily mean you made a mistake. It only means you have set up criteria which no record matches. And that in itself may prove a point.

Preprogrammed HRPER saved list options.

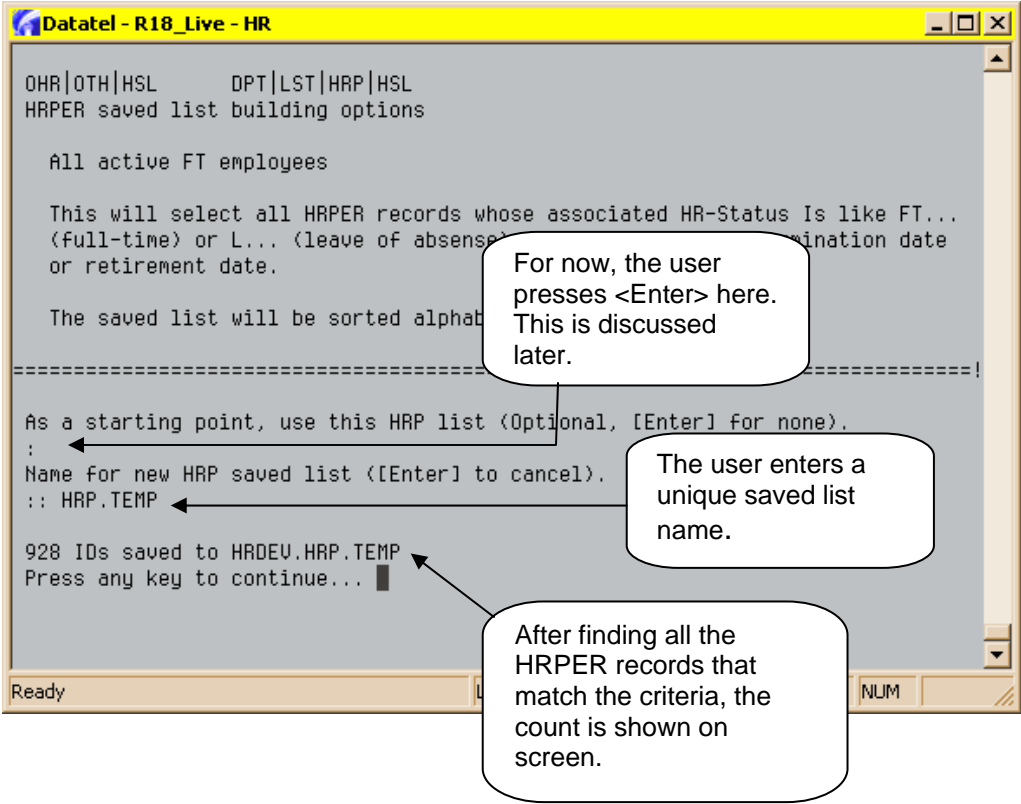
In addition to the HRPER saved list builders described above, several pre-programmed (short cut) HRPER saved list builders are available. Because the criteria for each is always the same, these criteria are already coded into routines. A routine to build a saved list for a particular group can be called with a single keystroke.



Options 11 thru 24 above allow the user to identify a specific group of current employees.

In our example, option 11 was chosen.

As the screen reveals, this routine builds an HRPER saved list comprised of full-time employees.



Saved lists built here will always be sorted alphabetically by name.

Using existing saved list for reports.

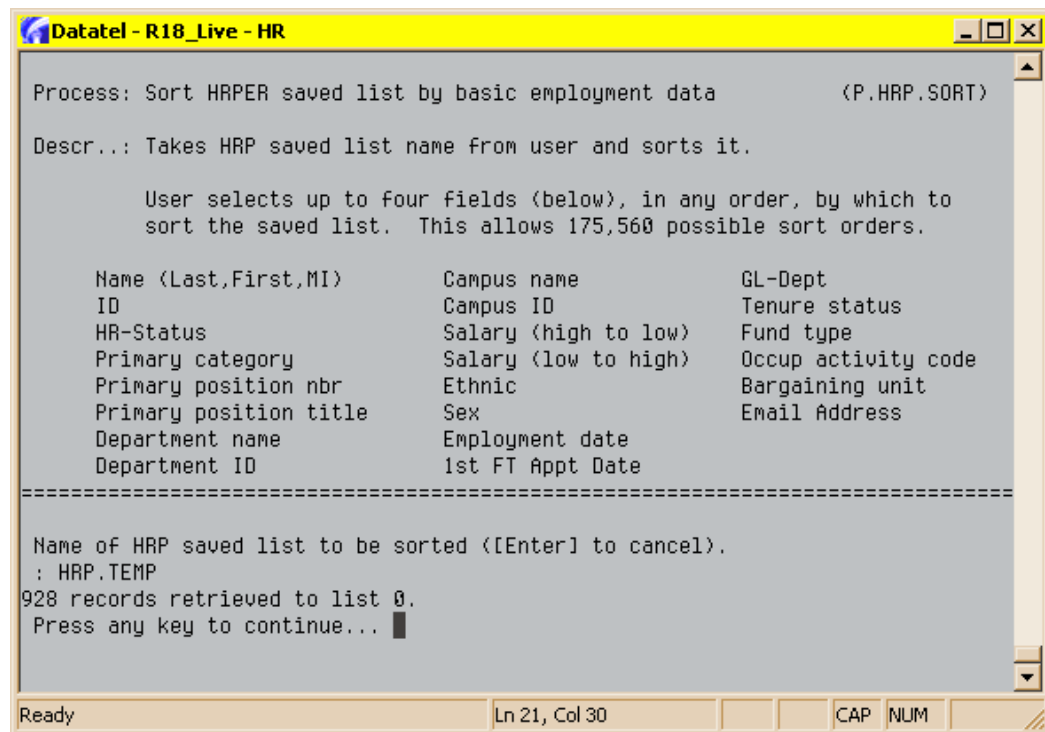
Once you have created a saved list you can use it for various things such as reports, by entering its name at a prompt. As with naming a new saved list, HR Custom Reports will uppercase and prefix your username and a period to whatever text you enter. Thus, entering hrp.temp will cause the system to look for a saved list named RSMITH.HRP.TEMP (assuming RSMITH is your username).

There is no **oops** provision for errors made in entering the name of an existing saved list. Should that happen, the system will usually not find a matching saved list and will simply display some sort of error message. If by some chance, the system finds a suitable saved list with a name that matches the one entered in error you will probably be able to cancel the process or report at a later step but before it actually commences.

To use a saved list that does not have your username prefix, i.e., a foreign list, see “Using Foreign Saved Lists as your own” below.

Sorting an HRPER saved list.

Some processes allow the user to save the results to a saved list in a particular order or in no order at all. When a standard report, such as HRPER Reference, is run using that saved list, its contents will appear in the order the IDs occur in the saved list. If that order is not alphabetical the report may not be easy to use. There are several HRPER saved list sorters; this particular one shows fields typically related to employment.



```
Datatel - R18_Live - HR
Process: Sort HRPER saved list by basic employment data      (P.HRP.SORT)
Descr...: Takes HRP saved list name from user and sorts it.

User selects up to four fields (below), in any order, by which to
sort the saved list. This allows 175,560 possible sort orders.

Name (Last,First,MI)      Campus name      GL-Dept
ID                        Campus ID       Tenure status
HR-Status                 Salary (high to low) Fund type
Primary category         Salary (low to high) Occup activity code
Primary position nbr     Ethnic          Bargaining unit
Primary position title   Sex            Email Address
Department name          Employment date
Department ID            1st FT Appt Date

-----
Name of HRP saved list to be sorted ([Enter] to cancel).
: HRP.TEMP
928 records retrieved to list 0.
Press any key to continue... █

Ready                               Ln 21, Col 30                               CAP NUM
```

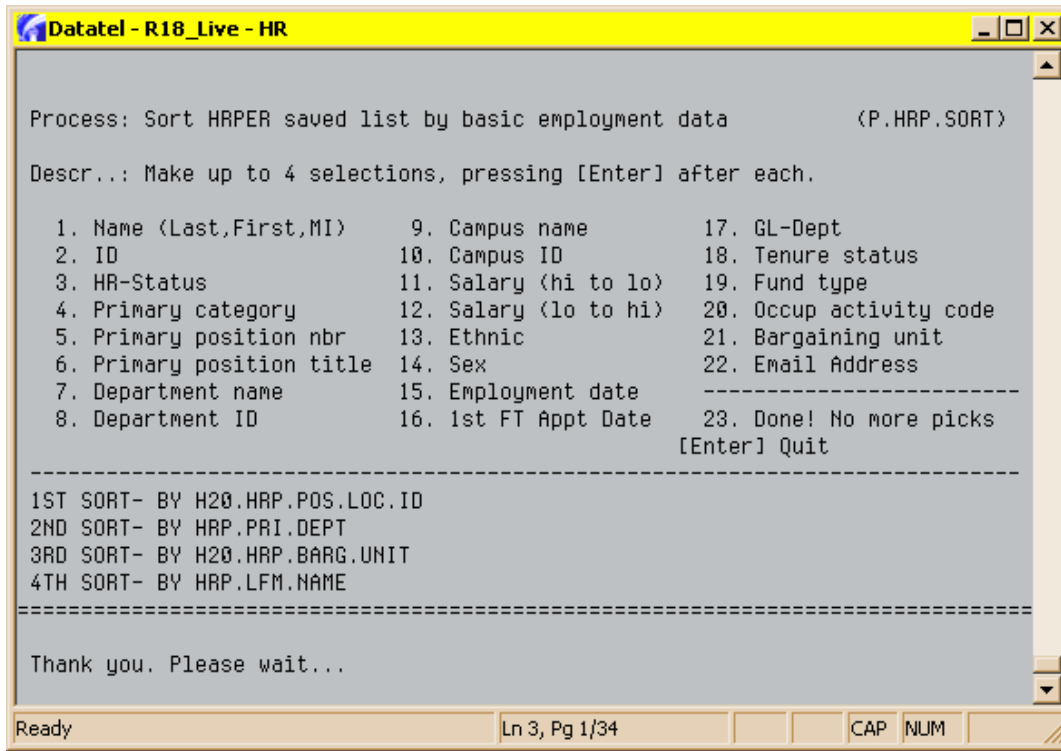
This utility allows the user to re-sort an HRPER saved list into many different ways.

The user an HRPER saved list name. If Colleague can find this list, the number of IDs contained it will be displayed.



*Note: if the original sort order is to be preserved, perform the resort operation on a copy, **not** the original saved list.*

The user then selects (one at a time) up to four fields by which the saved list will be sorted.



In this example the user has selected 10 for campus ID, then 8 for department ID, then 21 for bargaining unit, then 1 for name. That will be the order in which the saved list will be sorted.

If four selections are made the utility will begin automatically. If the user desires to sort on less than four fields after the last field is selected, option 23 (Done!) is selected and the utility begins.

```
Thank you. Please wait...
928 records retrieved to list 0.
HRDEV.HRP.TEMP has been resorted. Press any key to continue... █
```

HRPER Reference Reports

The HRPER Reference Reports are general purpose reports that show typical employment data on a person. They may be run with an existing HRPER saved list or with three criteria entered by the user.

```
Report: HR-Person Reference Report (R.HRPER.REF)
Descr.: Basic employment data; Name, ID, sex, ethnic, status,
        pos-num, title, start-date, pay-rate, position-type,
        dept-ID, location-ID, bargaining-unit, degree-level.
        (Dept & location based on pri-pos.)

Scope.: > Select on Pos-Num, Dept-ID, Location-ID (report will
        be sorted alphabetically by name). -OR-
        > Use an existing HRPER saved list (report will be
        sorted by saved list order).

=====
Name of HRPER saved list (<Enter> for none):
```

At the "Saved List Name" prompt, if the user presses <Enter> instead of entering a saved list name, the following screen allows the user to enter three common criteria.

```
Report: HR-Person Reference Report (R.HRPER.REF)
Descr.: Basic employment data

User will be prompted, one-at-a-time, for three pieces
of information on which the selection of records will be
determined - Pri-Pos-Num, Dept, and Location.

Enter "!" at any prompt to cancel and start over.
=====

Primary pos-num like...:=AF...
Department-ID like.....:=...
Location-ID like.....:=...

Enter header message...: ADMINISTRATORS

To expand enter DBL.SPC: DBL.SPC
To print enter LPTR....: LPTR
```

Created this way, the report will always be sorted alphabetically by name. To obtain a double spaced report, the user may enter the text "DBL.SPC". A click, or <Enter> key will cause the report to be printed single spaced.

At the "Saved List Name" prompt, if the user enters the name of an existing HRPER saved list, the saved list is retrieved and the number of IDs contained in it is displayed.

```
Report: HR-Person Reference Report (R.HRPER.REF)

Descr.: Basic employment data; Name, ID, sex, ethnic, status,
        pos-num, title, start-date, pay-rate, position-type,
        dept-ID, location-ID, bargaining-unit, degree-level.
        (Dept & location based on pri-pos.)

Scope.: > Select on Pos-Num, Dept-ID, Location-ID (report will
        be sorted alphabetically by name). -OR-
        > Use an existing HRPER saved list (report will be
        sorted by saved list order).

=====
Name of HRPER saved list (<Enter> for none): HRP.TEMP
749 records retrieved to list 0.

Enter header message...: FROM HRP.TEMP SAVED LIST

To expand enter DBL.SPC: DBL.SPC
To print enter LPTR...: LPTR
```

Created this way, the report will be sorted in the order of the saved list itself. To obtain a double spaced report, the user may enter the text "DBL.SPC". Otherwise, a click, or <Enter> key will cause the report to be printed single spaced.

