

Reporting and Queries in OneUSG Connect

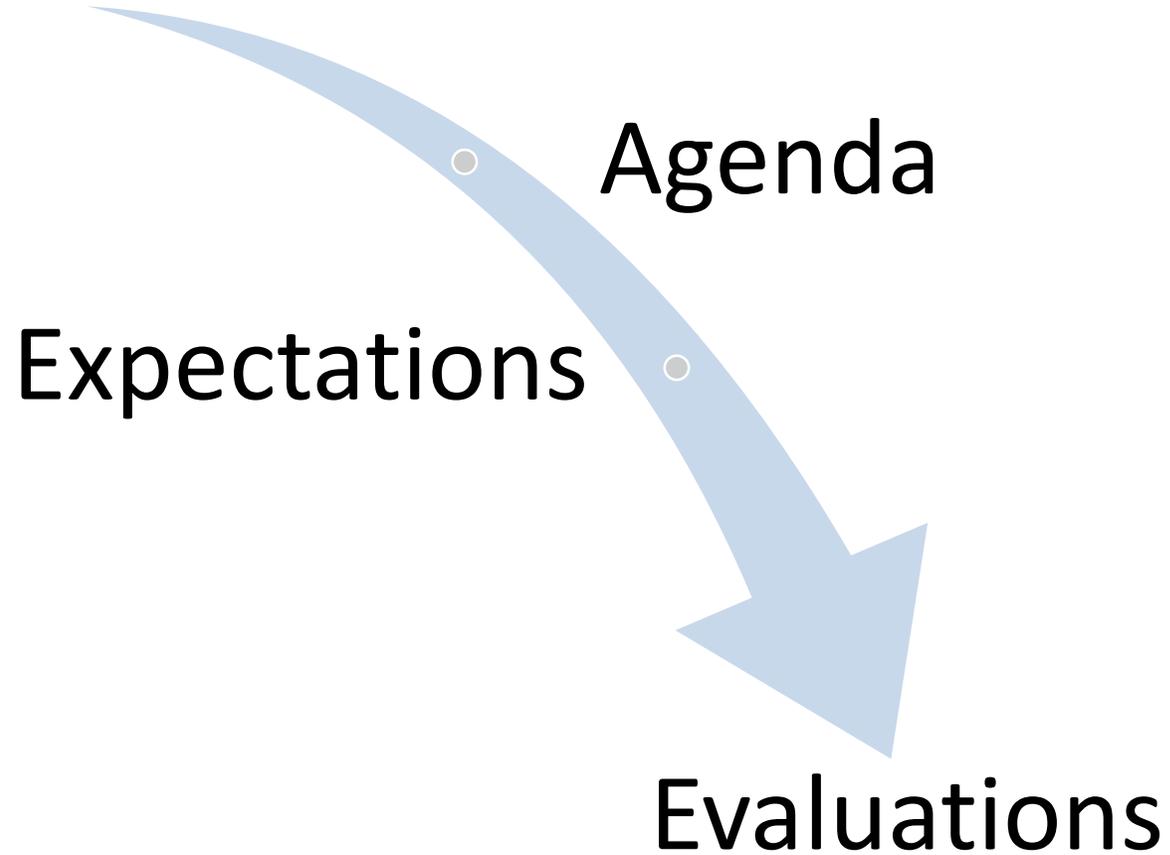


OneSource
UNIVERSITY OF GEORGIA

website: onesource.uga.edu
email: oneusgsupport@uga.edu
support desk: 706-542-0202

Today's Agenda

Welcome



Start



Objectives

1

Understand the concept of a query and some data fields found in OneUSG Connect queries and reports.

2

Use the System Manager Reporting Page in OneUSG Connect to run queries and reports.

Query Information

- A query is a way to retrieve information from a data source
- A simple example is an Excel spreadsheet with a filter applied to a column
- In addition to viewing the list of queries through the System Manager Reporting tile in OneUSG Connect, a list of queries and descriptions is also maintained on the Office of Institution Research website at:
 - reports.uga.edu

Query Information on OIR website

Available Reports

Finance **Human Capital Management**

Human Capital Management

The reports and queries listed are delivered through various platforms: OneUSG Connect Queries and Reports, and the Data Warehouse. Access in OneUSG Connect is granted to users with System Manager roles through the System Manager Reporting Tile on the Manager Self Service page. If you do not already have access to the platform indicated, use this link to [request access](#).

For access to historical Payroll and HR data, please use [Simpler](#) to access data for periods prior to December 2018. You can also submit a [data request](#) to OIR.

As we begin using the new system, we ask that users submit any questions they have about the data on reports and queries. While the OneSource project followed protocols for data conversion and validation and testing of new processes, we encourage you to join us in a “trust but verify” approach – please email any questions you have about the data to oneusgsupport@uga.edu.

Last updated: 10/10/2019

Absence Management



Commitment Accounting



Faculty Events



Payroll



Security



Time and Labor



Workforce Administration



Other



Click here to view HCM list

Query Information on OneSource

- The OneSource website also has a list of OneUSG Connect queries with definitions in the [OneSource Training Library](#)
- A link to this list is in the ***Reporting and Queries in OneUSG Connect*** section

Query Information on OneSource



The screenshot shows the OneSource training library interface. On the left is a navigation tree with various topics. The main content area displays details for the course 'Reporting and Queries in OneUSG Connect'. The details include prerequisites, roles and audience, description, and format. Below this are sections for 'Course Materials', 'Course Recording', and 'Course Resources'. The 'Course Resources' section contains a link 'OneUSG Connect Queries Quick Reference Guide' which is circled in red. A red arrow points from a handwritten note to this link.

search

Share

Reporting and Queries in OneUSG Connect

Prerequisite: None

Roles and Audience: Faculty and staff with access to the System Manager Reporting Page.

Description: Course reviews the queries available to System Managers via the System Manager Reporting page in OneUSG Connect.

Format: Interactive Webinar, Recorded, and Self Service in the OneSource Training Library

Course Materials

[Reporting and Queries in OneUSG Connect Presentation](#)

Course Recording

[Reporting and Queries in OneUSG Connect Video](#)

Course Resources

[OneUSG Connect Queries Quick Reference Guide](#)

[Time Reporting Codes List](#)

[Pay Group Quick Reference Guide](#)

Click here to view query list

PeopleSoft Data Concepts

- Each individual has a unique identifying number that is not their UGA ID or National ID
- Each position has a unique identifying number
- Once these numbers are used, they are not reused again
 - Other elements associated with the Individual or Position may change

PeopleSoft Data Concepts - continued

- Effective Dates allow a timeline of changes to be recorded
- This representation can be historical, current, or future
- Effective Sequences are used to differentiate actions that take place on the same Effective Date
- Generally, queries will return *current* Effective Date with *highest* Effective Sequence for job records

PeopleSoft Data Concepts - continued

- Often, more than one data element is evaluated to answer a question or categorize data
- As an example, combining the unique identifiers of EmplID and Position Number can be referred to the Employee Job Record

PeopleSoft Data Concepts - continued

Workforce Job Summary

L Sea

EMP

Empl ID 10

[Go To Job Data](#)

Job Information

Personalize | Find |  

First  1-4 of 4  Last

General

Job Information

Work Location

Salary Plan

Compensation



Organizational Relationship	Empl Record	Effective Date	Seq	Action	Action Reason	Key Person	
EMP	1	10/18/2019	1	Data Chg	Update Dta	<input type="checkbox"/>	
EMP	1	10/18/2019	0	Rehire	Rehwi30	<input type="checkbox"/>	
EMP	1	07/30/2019	0	Terminatn	EndStuEmp	<input type="checkbox"/>	
EMP	1	03/25/2019	0	Hire	Emp Inst	<input type="checkbox"/>	

PeopleSoft Data Concepts - continued

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1

10/18/2019

1

Data Chg

Update Dta

EMP

1

10/18/2019

0

Rehire

Rehwi30

EMP

1

07/30/2019

0

Terminatn

EndStuEmp

EMP

1

03/25/2019

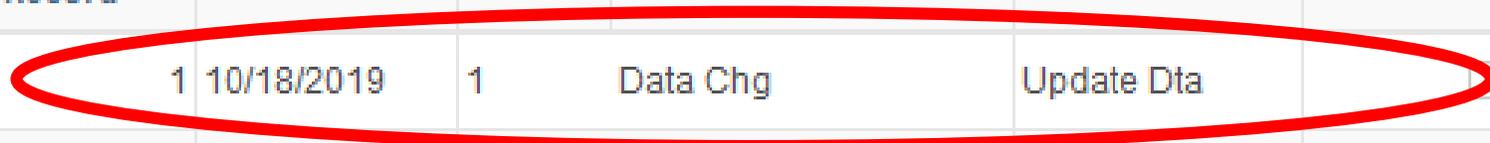
0

Hire

Emp Inst

Current Record

Historical Records



PeopleSoft Data Concepts - continued

Workforce Job Summary

L Sea

EMP

Empl ID 10

[Go To Job Data](#)

Job Information

Personalize | Find | First 1-4 of 4 Last

General | Job Information | Work Location | Salary Plan | Compensation

Organizational Relationship	Empl Record	Effective Date	Seq	Action	Action Reason	Key Person
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EMP	1	07/30/2019	0	Terminatn	EndStuEmp	<input type="checkbox"/>
EMP	1	03/25/2019	0	Hire	Emp Inst	<input type="checkbox"/>

Same Date

Highest Sequence

Course Format

- For today's guided, hands-on learning, please:
 - Open and log into OneUSG Connect
- Who has access? System Managers (Initiators and Approvers)
- If you do not have access to the system or to the System Manager Reporting page, you will be able to view screenshots and more in the webinar.

Queries and Reports in Today's Class

Module	Title	Query Name
Time and Labor	TL & ABS Enrolled Employee	180_TL_ABS_ENROLLED
Absence Management	Employee Absence Activity	180_ABS_ACTIVITY
Commitment Accounting	Funding for Position and Emp	180_CA_POSITION_FUNDING
Workforce Administration	Student Positions Info	180_HR_STUDENT_POSITION_QRY
Manage Faculty Events	On Track Faculty	180_MFE_ON_TRACK_FACULTY
Security	Departmental Approvers	180_SEC_DEPT_APPROVERS
Payroll	Validate Monthly Pay	180_PY_MO_PAYROLL_VAL_V3
Commitment Acctng	Invalid Funding Report	

Common Fields Returned

Some common fields in the query results:

- **ID, EmplID, or Employee ID:** Eight-digit unique person identifier
- **Record Number or Employee Record:** Job record number associated with a particular position
- **Organization or Org Relation:** An individual's relationship to UGA
- **Effective Date:** The date the data element is effective
- **HR Status:** Only two options: (A)ctive or (I)nactive
- **Payroll Status:** Typical values: (A)ctive, (L)eave, (P)aid Leave, (R)etired, (S)uspended, (T)erminated, Short (W)ork Break
- **Paygroup, Pay Group, or Group:** Biweekly (18C, 18H, 18J, 18T, 18V, 18W) or Monthly (18A, 18F, 18G, 18L, 18P, 18X, 18Y)

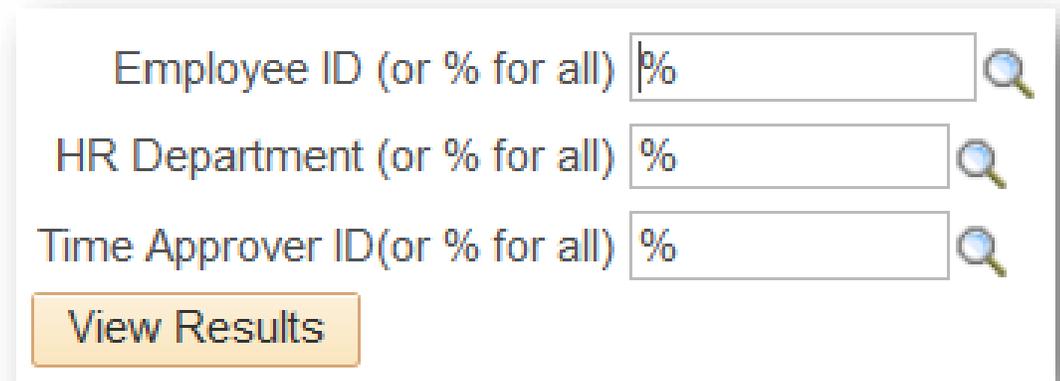
Query Prompts

- Query Prompts are values that determine what data will be returned by the query
- Query Prompts may be optional depending on the way the query is written
 - Optional prompts do not need to be filled in to generate query results

Query Prompts, continued

Search Tips:

- Use specific information in one or more fields to narrow down results
- Use the lookup magnifying glass to search for values
- Many fields will accept a % symbol to return all results for that field
 - Ex: HR Department % vs H10003%
- Be aware that some queries may return large amounts of data that your screen may freeze or time out
 - May need to limit results
- Row level security generally applies



Employee ID (or % for all) 

HR Department (or % for all) 

Time Approver ID(or % for all) 

[View Results](#)



Navigating to the System Manager Reporting Page

Running Queries and Reports

Reporting and Queries in OneUSG Connect



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TL & ABS Enrolled Employee 180_TL_ABS_ENROLLED

Employee ID (or % for all)

HR Department (or % for all)

Time Approver ID(or % for all)

Employee ID	Employee Record	Employee Name	Org Relation	TL Effective Date	Pay Group	Job Code	Department ID	Position	Job Indicator	Pay Status	Job Effective Date	Termination Date	TL Status	TL Reporter Type	Workgroup	TCD Group	Badge Type	Badge Table Eff Date	Badge Status	Badge Number	Web Clock	Lunch Deduction
Elapsed	Punch	Taskgroup	TskProfID	TskProf Descr	Reports To Position Number	Reports to Employee ID	Reports to Name	TL Approver Employee ID	TL Approver Name	Reg/Temp	Employee Type	FTE	Standard Hrs/Week	Schedule ID	Schedule Descr	Full/Part	FLSA Status	ABS Eligibility Group	ABS Pay Group	Absence System	Holiday Schedule	Special Leave

Several useful fields in the query results, including:

- Pay Group, Job Code, HR Department
- TL Reporter Type, Web Clock, Elapsed, Punch
- Reports To Position Number/Empl ID/Name
- TL Approver Empl ID/Name

TL & ABS Enrolled Employee 180_TL_ABS_ENROLLED

Useful columns to review or compare:

- To determine the time entry method
 - Pay From Schedule = 18E_PFS in Elapsed column
 - Web Clock = Web Clock column populated
 - Kaba Clock user = TCD Group column populated
- Lunch Deduction column will only show a result if the individual is specifically setup with this option
- For Kaba Clock users need to have a Badge Number populated
- Additional, detailed information for this query can be found in [Understanding 180 ABS Enroll Query](#) in the OneSource Training UPK

TL & ABS Enrolled Employee 180_TL_ABS_ENROLLED

Additional, detailed information for this query can be found in [Understanding 180 ABS Enroll Query](#) in the OneSource Training UPK

The screenshot displays the OneSource Training Library interface. At the top left is the University of Georgia logo and name. At the top right is the text "OneSource Training Library". Below the header is a navigation pane on the left with a search bar and a tree view of training modules. The main content area on the right shows a lesson titled "Running the TL & ABS Enrolled Employees Query". Below the title is a paragraph of text: "This lesson will walk you through the steps to run a query (180_TL_ABS_Enrolled Query) for distributed users to view current time and labor settings for their employees. More information on the columns in this query can be found here: [Understanding 180_ABS_Enrolled Query](#)". The link is circled in red. Above the main content area is a toolbar with buttons for "See It!", "Try It!", "Do It!", and "Print It!".

Employee Absence Activity

180_ABS_ACTIVITY

Employee ID (or % for all) 

Begin Date  ← Begin Date is required

End Date (Optional) 

Approved (Y/N)

HR Department (or % for all) 

Employee ID	Empl Record	Employee Name	Department ID	Pay Group	Leave Type	Begin Date	End Date	Begin Day Hours	End Day Hours	All Days
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Approved	Calendar Group	Last Updated	Process Date	Duration	Days	Workflow Status	Approver ID	Appr Name	Appr Datetime
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Useful fields returned in this query include:

- Leave Type
- Begin/End Date
- Duration
- Approver ID, Approver Name

Funding for Position and Emp 180_CA_POSITION_FUNDING

Set ID 
Fiscal Year
HR Department (or % for all) 
Position (or % for all) 
Employee ID (or % for all) 

Employee ID	Employee Record	Name	Job Code	Group	Pay Status	Organizational Relationship	Position	Position Description	Department ID	Fiscal Year	Funding Effective Date	Funding Sequence	Earning Code	Combo Code	Distribution %	Funding End Date	Fringe Group	Redirect Combo Code
-------------	-----------------	------	----------	-------	------------	-----------------------------	----------	----------------------	---------------	-------------	------------------------	------------------	--------------	------------	----------------	------------------	--------------	---------------------

Useful fields returned in this query include the following:

- Funding Effective Date
- Funding Effective Sequence
- Distribution %

Funding for Position and Emp

180_CA_POSITION_FUNDING

This section from the position funding query shows examples of multiple dates and sequences

- The 7/1/19, sequence 1 supersedes the sequence 0 row
- The same scenario applies with the 10/1/19 effective dated row

Fiscal Year	Funding Effective Date	Funding Sequence	Earning Code	Combo Code	Distribution %
2020	07/01/2019	0		18172957501002	97.959
2020	07/01/2019	0		18172957501004	2.041
2020	07/01/2019	1		18172957501002	96.764
2020	07/01/2019	1		18172957501004	3.236
2020	10/01/2019	0		18172957501002	91.837
2020	10/01/2019	0		18172957501003	6.250
2020	10/01/2019	0		18172957501004	1.913
2020	10/01/2019	1		18172957501002	90.590
2020	10/01/2019	1		18172957501003	6.174
2020	10/01/2019	1		18172957501004	3.236

Student Positions Info

180_HR_STUDENT_POSITION_QRY

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#)

First 1-1 of 1 Last

	Set ID	Description	1	2	3
1	18000	UGA	Student Employee Look-up	Show Students w/ Multiple Positions	Show Combined Reported/Standard Hours

This query is only useful by clicking on the hyperlinks which runs additional queries in their own window

On Track Faculty

180_MFE_ON_TRACK_FACULTY

HR Department (or % for all) 

Employee ID (or % for all) 

Academic Rank (or % for all) 

All prompts are optional



Employee ID	Name	HR Department ID	Service Calculation Group	Academic Rank	Rank Description	Tenure Track Start Date	Time Accrued	Time To Accrue	Extended By	Last Proc Date	Pre-Tenure Review From
-------------	------	------------------	---------------------------	---------------	------------------	-------------------------	--------------	----------------	-------------	----------------	------------------------

Pre-Tenure Review To	Tenure Eligible From	Tenure Eligible To	Terminal Year From	Terminal Year To	Tenure Stop	Promotion Eligible	Promotion Eligible From	Promotion Eligible To	Tenure Status Date	Rank Change Date
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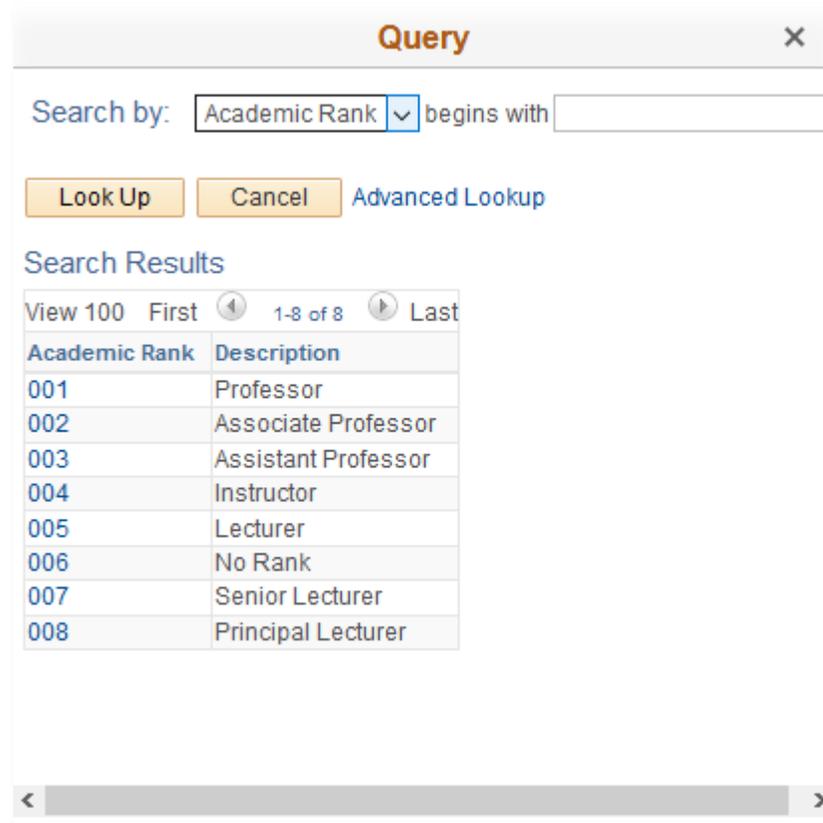
This query provides a slightly different example of utilizing the Look Up function by clicking on the magnifying glass icon next to the prompt.

On Track Faculty

180_MFE_ON_TRACK_FACULTY

Searching for Academic Rank by using the Look Up generates another window with just those options.

You can type in the value or just click on the link within the list.



The screenshot shows a 'Query' window with a search interface. The search criteria are set to 'Academic Rank' and 'begins with'. Below the search bar are buttons for 'Look Up', 'Cancel', and 'Advanced Lookup'. The search results are displayed in a table with two columns: 'Academic Rank' and 'Description'. The results list eight options, from 001 (Professor) to 008 (Principal Lecturer). Navigation controls for the results list include 'View 100', 'First', '1-8 of 8', and 'Last'.

Academic Rank	Description
001	Professor
002	Associate Professor
003	Assistant Professor
004	Instructor
005	Lecturer
006	No Rank
007	Senior Lecturer
008	Principal Lecturer

Departmental Approvers

180_SEC_DEPT_APPROVERS

BOR Group ID	Description	Department Approval Level	Effective Date	User	Last	First Name
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This query doesn't provide any prompts. As soon as you click on the name, the query runs and displays the results in the current window.

The results returned are based on the user's security.

Validate Monthly Pay

180_PY_MO_PAYROLL_VAL_V3

Pay Run ID 

Set ID 

Dept (Leave Blank for All) 

EmplID (Leave Blank for All) 

ID	Empl Record	Position	Job Title	Name	Dept ID	Department	Pay Group	Pay Run ID	Earns Begin	Earns End	Regular Earnings
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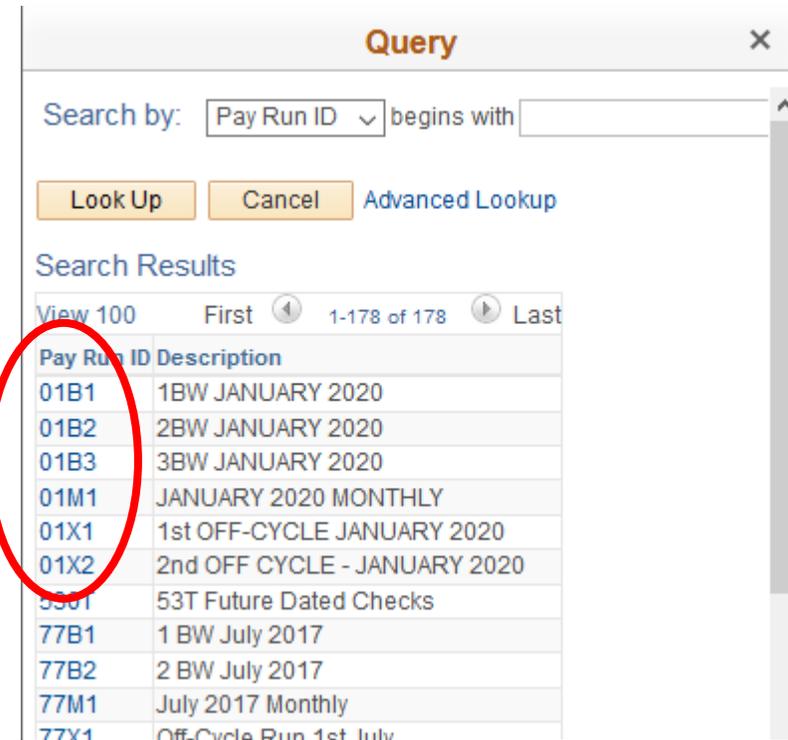
Other Earnings Code	Descr	Other Earns	Tot Gross	Job Comp Rate	Diff from Job Comp Rate	Unpaid Absences Query	No Check Query
---------------------	-------	-------------	-----------	---------------	-------------------------	-----------------------	----------------

- Pay Run ID is a required entry to run this query.
- Pay Run ID is organized by year.

Validate Monthly Pay

180_PY_MO_PAYROLL_VAL_V3

- All 2020 pay runs will begin with '0' (zero)
- USG doesn't create all the Pay Run IDs for a year at once
- Pay sheets for the month need to be created before this query can be run



Query

Search by: Pay Run ID begins with

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-178 of 178 Last

Pay Run ID	Description
01B1	1BW JANUARY 2020
01B2	2BW JANUARY 2020
01B3	3BW JANUARY 2020
01M1	JANUARY 2020 MONTHLY
01X1	1st OFF-CYCLE JANUARY 2020
01X2	2nd OFF CYCLE - JANUARY 2020
5301	53T Future Dated Checks
77B1	1 BW July 2017
77B2	2 BW July 2017
77M1	July 2017 Monthly
77X1	Off-Cycle Run 1st July

Validate Monthly Pay

180_PY_MO_PAYROLL_VAL_V3

Pay Group	Pay Run ID	Earns Begin	Earns End	Regular Earnings	Other Earnings Code	Descr	Other Earns	Tot Gross	Job Comp Rate	Diff from Job Comp Rate	Unpaid Absences Query	No Check Query
18G	9DM1	12/01/2019	12/16/2019	586.40				586.40	1172.80	-586.40	Check for Unpaid Absences for this Ee	Check for any Active Ee w/o Pa
18A	9DM1	12/01/2019	12/31/2019	2966.67				2966.67	2966.67	0.00	Check for Unpaid Absences for this Ee	Check for any Active Ee w/o Pa
18F	9DM1	12/01/2019	12/31/2019	5889.50				5889.50	5889.50	0.00	Check for Unpaid Absences for this Ee	Check for any Active Ee w/o Pa
18G	9DM1	12/01/2019	12/31/2019	1954.67				1954.67	1954.67	0.00	Check for Unpaid Absences for this Ee	Check for any Active Ee w/o Pa

- This query attempts to help find any unusual variances.

Tutorials

Click the red Play button to access the tutorial(s).



Running the Invalid Funding Report



Exporting Results

Reporting and Queries in OneUSG Connect

website: onesource.uga.edu
email: oneusgsupport@uga.edu
support desk: 706-542-0202

Options for Exporting Results

- Excel Spreadsheet download
(Prompts may vary by browser)



Resources



A list of useful resources can be found on the Quick Reference Materials for Practitioners page in the OneSource Training Library.



For assistance, please contact OneUSG Support at oneusgsupport@uga.edu or at 706-542-0202 (option 1).

Questions?

Need Help?

Call or email the
OneUSG Support Desk
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