UNIVERSITY OF ALBERTA

PeopleSoft HCM

Reporting and Queries for Managers Supervisors and Team Leads

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# Table of Contents

Reporting and Queries for Managers Supervisors and Team Leads

- Creating a New Run Control ID................................................................. 3
- Reporting - Employee Absences for Period ............................................ 10
- Reporting - Leave Balances .................................................................... 23
- Reporting - Compensatory Time .............................................................. 34
- Reporting - Semi-Monthly Timesheets....................................................... 41
- Queries - APO/Librarian Vacation History .................................................. 45
- Queries - Banked Time Summary Report ................................................... 49
- Queries - Leave Balance Negative ............................................................. 53
- Queries - Multiple Job Employees ............................................................. 57
- Queries - My Pending Time Approvals ....................................................... 59
- Queries - Pending Time Exception Errors .................................................. 62
HCM Reporting and Queries for Supervisors

Overview

This section will provide an understanding of the various reports and queries available in PeopleSoft HCM used specifically by Managers, Supervisors, and Team Leads.

Objectives

Upon completion of this section you will have a general understanding of the following reports and queries.

Queries

- APO/Librarian Vacation History
- Banked Time Summary Report
- Leave Balance Negative
- Mass Approval Process Summary
- Multiple Job Employees
- My Pending Time Approvals
- Pending Time Exception Errors

Related Reference Material


Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.
Creating a New Run Control ID

Every Operational Report you run will require a Run Control ID. A Run Control ID refers to a custom naming convention for each report. Run Control IDs are used to identify the specific options used to run a type of report.

You will need to assign a name to each type of report you run. When naming a run control ID, keep in mind that you will need to be able to recognize one run control name from another.

By creating your own individual Run Controls you can save time when running infrequently used reports. The only change you may be required to make is in the date range.

Naming Conventions

There are several ways to name your Run Control.

Some naming recommendations are:

- AdHoc, Daily, Weekly, Monthly, Qtr, or YR to identify run frequency
- Staff_Detail
- Leave_Balance
- Employee_Performance_History
- Salary_Report
- Biweekly_Time_sheets

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Run Control IDs can not contain any spaces. Use the underscore "_" between words instead.

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To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.
Procedure

Navigation Path: Main Menu > HR Operational Reports* > Absences, Time and Labor* > Leave Balance*

1. Navigate to any HR Operational Report.

   To demonstrate how to create a new Run Control ID the Leave Balance report will be used.

2. Once you have opened the report page, Click the Add a New Value tab.

3. In the Run Control ID field enter "LEAVE_BALANCE".

4. Click the Add button.

5. Identifying the report options is up to the individual running the report.
6. The following is an example of how to select and save different data selections for the Leave Balance report.

Click the **Department(s)** option.
7. Click the **Department Range(s)** option.

8. Click the **Look up Plan Type (Alt+5)** graphic.

9. Find and select the appropriate **Plan Type**.
   For example purposes, Click the **50 - General Illness** list item.

10. Click the **Add a new row at row 1 (Alt+7)** button.

11. Click the **Look up Plan Type (Alt+5)** graphic.

12. Find and select the appropriate **Plan Type**.
   For example purposes, Click the **51 - Vacation** list item.

13. Click the **Add a new row at row 2 (Alt+7)** button.

14. Click the **Look up Plan Type (Alt+5)** graphic.

15. Find and select the appropriate **Plan Type**.
   For example purposes, Click the **52 - Casual Illness** list item.

16. Click in the **Dept ID From** field.
17. Click the **Run** button.

18. The Report Format and Distribution will default to Web delivery in a PDF format.

   When you choose web, the report will show up under My Reports on your Manager Dashboard.

19. You can choose to change formats.

   The **CSV** option will return an Excel format which you can sort and save.
20. Click the CSV list item.

21. Having a report sent to your email inbox is another alternative.

When you choose this option however, the report will not show up under My Reports on your Manager Dashboard.

22. Click the OK button.
23. Click the **Process Monitor** link.

24. The **Process Monitor** shows the status of the report generation. By clicking the **Refresh** button, it will update the run status.

25. When the **Run Status** shows **Success** and the **Distribution Status** shows **Posted**, the report is ready for review.

26. To navigate back to the Main Menu, in the top right of the page, Click the **Home** button.
27. From the Main Menu navigate to the Report Manager to retrieve your report.

Navigation Path: **Main Menu > Reporting Tools > Report Manager**

Click the **Main Menu** button.

28. Click the **Reporting Tools** menu.

29. Click the **Report Manager** menu.

30. Click on the report link.

For example purposes, Click the **ZHRE087** link.

31. Depending on the type of report requested, it will open in a new window.

32. Congratulations! You have completed the training on Creating a New Run Control ID.

**End of Procedure.**
Reporting - Employee Absences for Period

The Employee Absences for Period report can be used for monitoring leaves / absences entered into PeopleSoft HCM for support staff employees. This report can also be used for vacation reconciliation and leave / absence statistical purposes.

In this topic you will learn how to run the Employee Absences for the Period report.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Log on to PeopleSoft HCM

1. For those that do not have a Manager Dashboard, you can also navigate to the HR Operational Reports page directly within PeopleSoft HCM.

   Navigation Path to initiate a report: Main Menu > HR Operational Reports > Absences, Time and Labour* > Employee Absences for Period*

   Navigation Path to retrieve reports: Main Menu > Reporting Tools > Report Manager
2. From the Manager Dashboard Click the **HR Operational Reports** link.

3. Click the **Employee Absences for Period** link.

4. If this is the first time you have run this report, you will need to create a Run Control ID.

   (Refer to the Creating a New Run Control ID topic for further details on how to create your own Run Control ID)
5. If you have created a Run Control ID for this report previously, Click the **Search** button.

   **Search**

6. A list of existing Run Control IDs will appear.

   Find and select your Run Control ID for this specific report.

   For example purposes, Click the **EMPLOYEE_ABSENCES** link.
7. **This report can be run for:**
   - an individual employee,
   - a department, or
   - a range of departments that you have access to

8. **Time Entered**
   Will retrieve all leaves/absences entered up to the date the report is being run, from the time sheet (Reported Time)

   **Time Paid**
   Only retrieves leaves/absences that have been processed through the Time Administration process and are available in Payable Time.
9. **Individual Absences**
   Will display the type of absence, the date of absence and the number of hours

   **Count of Absences**
   Will retrieve the number of times the employee was absent

   **Sum of Absences**
   Will retrieve the total number of hours the employee was absent
10. **Absence Date Range**

Enter the date parameters for this particular run of the report.

(Use the calendar button to select the dates)
11. **Time Reporting Codes (TRC)**
Will return all leave/absence codes if left blank.

You can run the report by Time Reporting Code(s) by identifying the specific TRC(s) in the detail area of this area.

- Use the Look Up icon to select specific leave/absence codes.
- Use the Add button to add more rows to retrieve multiple leave/absence codes.
12. **Department Ranges**  
   Will only display information related to the range of Department ID's specified.  
   If left blank the report will display information based on all Department ID's you have security access to.

13. Once you have selected your search criteria for the report click the **SAVE** button.  
   This will save your search criteria for this Run Control ID.

14. Click the **Run** button.

15. The Report Format and Distribution will default to Web delivery in a PDF format.  
   When you choose web, the report will show up under My Reports on your Manager Dashboard.

16. If this is the format that you would like to receive then, Click the **OK** button.
17. You do have the option to choose a different delivery method.

Click the **Down** arrow.

18. Having a report sent to your email inbox is an alternative.

When you choose this option however, the report will not show up under My Reports on your Manager Dashboard.

Click the **Email** list item.

19. Click the **Format** list.

SQR Report  

- **Email**  
- **PDF**
20. To change the report format, Click the **Down** arrow.

21. Several options are available for selection. Select the format which you prefer. For example purposes, Click the **PDF** list item.

22. Click the button.
23. Click the **Process Monitor** link.

24. Clicking the Refresh button will update the run status.

   Click the **Refresh** button.
25. When the **Run Status** shows **Success** and the **Distribution Status** shows **Posted**, the report is ready for review.

26. To navigate back to the Manager Dashboard, in the top right of the page, Click the **Home** link.

27. For those that do not have a Manager Dashboard, use the alternate Navigation Path to retrieve reports:

   **Main Menu > Reporting Tools > Report Manager**

28. Scroll down to the **My Reports** pagelet and

   Click the **ZHRE074** link.
29. Click the **zhre074_9860204.PDF** link.

30. The report return in a **PDF format** is shown as an example.

31. Congratulations! You have completed training on how to run a Report for Employee Absences for a Period.

**End of Procedure.**
Report - Leave Balances

The **Leave Balances** report provides a listing of accrual balances as of the last monthly pay confirm date for the following leave plans:

- Sick (General Illness)
- Vacation
- Personal (Casual Illness, Personal Leave)
- Special Leaves

The report will list the following information:

<table>
<thead>
<tr>
<th>Service Date</th>
<th>The date Support Staff leave plans are based</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Type and Description</td>
<td>Name of the leave plan</td>
</tr>
<tr>
<td>Hours Carried Over</td>
<td>The number of hours carried forward from a previous entitlement year. Used for Vacation only (carry over date is April 1)</td>
</tr>
<tr>
<td>Hours Earned Year-to-Date</td>
<td>Total hours that have accrued this year</td>
</tr>
<tr>
<td>Hours Taken Year-to-Date</td>
<td>Total hours that have been taken this year</td>
</tr>
<tr>
<td>Hours Adjusted Year-to-Date</td>
<td>Total hours that have been adjusted this year (initiated by Human Resource Services)</td>
</tr>
<tr>
<td>Unprocessed Hours Taken</td>
<td>Hours taken, but not yet fully processed through the system; these hours will be reflected in the balance already.</td>
</tr>
<tr>
<td>Unprocessed Hours Adjusted</td>
<td>Hours adjusted, but not yet fully processed through the system; these hours will be reflected in the balance already.</td>
</tr>
<tr>
<td>Leave Hours Balance</td>
<td>The employee’s current hour’s balance for the leave plan. Includes hours carried over + hours earned – hours taken and + or – any adjustments</td>
</tr>
</tbody>
</table>
In this topic you will learn how to run the Leave Balances report.

---

**To Begin the Online Tutorial:**

- Click the button located in the top left of the screen and follow the instructions provided.

---

**Procedure**

Navigation Path: Log on to PeopleSoft HCM

1. For those that do not have a Manager Dashboard, you can also navigate to the HR Operational Reports page directly within PeopleSoft HCM.

   Navigation Path to initiate a report: **Main Menu > HR Operational Reports > Leave Balances***

   Navigation Path to retrieve reports: **Main Menu > Reporting Tools > Report Manager***

2. The quickest path to all **HR Operational Reports** is through your Manager Dashboard under the Quick Links area.

   Click the **HR Operational Reports*** link.
3. Click the **Leave Balance** link.
   
4. If this is the first time you have run this report, you will need to create a Run Control ID.

   (Refer to the Creating a New Run Control ID topic for further details on how to create your own Run Control ID)

5. A list of existing Run Control IDs will appear.

   Find and select your Run Control ID.

   For example purposes, Click the **LEAVE_BALANCE** button.
6. This report can be run for:
   • an individual employee,
   • a department, or
   • a range of departments you have access to

7. The Calendar Month field will automatically default to the current month.
8. **Leave Plan:**

Will return all leave plans if this area is left blank.

Use the Look Up icon to select specific leave plan types. The report will only provide information related to the selected leave plan type(s).
9. **Employee Class**

   The employee class section allows you to select the type of employees to run the report for.

   For example select (S) Support or (A) Auxiliary.
10. **Bargaining Unit**

The bargaining unit section allows you to further refine the selection of employees. For example (NASO) for NASA-Operating or (NAST) for NASA-Trust.
11. **Department Ranges**  
Will only display information related to the range of Department ID's specified.  

If left blank the report will display information related to all Department ID's.
12. Once all options are selected, Click the Run button.

13. Click the OK button.
14. Click the **Process Monitor** link.

![Process Monitor](image-url)
15. Clicking the Refresh button will update the run status.

When the Run Status shows Success and the Distribution Status shows Posted, the report is ready for review.

Click the Refresh button.

16. To navigate back to the Main Menu, in the top right of the page, Click the Home link.

17. Click the ZHRE087 link.

18. Click the zhre087 9846151.PDF link.

19. The report will return in PDF format as per the Run Control ID.

20. Congratulations! You have completed training on how to run the Leave Balances Report.

End of Procedure.
Report - Compensatory Time

Compensatory Time (banked time) refers to time off that is granted to an employee as compensation for working overtime. Such compensatory time is calculated in the same manner as overtime pay.

In this topic you will learn how to run the Compensatory Report.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Log on to PeopleSoft HCM

1. For those that do not have a Manager Dashboard, you can also navigate to the HR Operational Reports page directly within PeopleSoft HCM.

   Navigation Path to initiate a report: Main Menu > HR Operational Reports > Leave Balances*

   Navigation Path to retrieve reports: Main Menu > Reporting Tools > Report Manager

2. The quickest path to all HR Operational Reports is through your Manager Dashboard under the Quick Links area.

   Click the HR Operational Reports* link.

3. Click the Absences, Time and labor* link.
4. Click the **Compensatory Time** link.

5. If this is the first time you have run this report, you will need to create a Run Control ID.

   (Refer to the Creating a New Run Control ID topic for further details on how to create your own Run Control ID)

6. If you have created a Run Control ID for this report previously, Click the **Search** button.

7. A list of existing Run Control IDs will appear.

   Find and select your Run Control ID.

   For example purposes, Click the **COMPSA_TIME** link.
8. This report can be run for:
   • an individual employee,
   • a department, or
   • a range of departments.

9. The Calendar Month field will automatically default to the current month.
10. **Department Ranges**
Will only display information related to the range of Department ID's specified.
If left blank the report will display information related to all Department ID's.

11. **Once all options are selected, Click the Run button.**

![Department Ranges Diagram]
12. Click the **OK** button.

13. Click the **Process Monitor** link.
14. Clicking the Refresh button will update the run status. When the **Run Status** shows **Success** and the **Distribution Status** shows **Posted**, the report is ready for review.

Click the **Refresh** button.

15. To navigate back to the Main Menu, in the top right of the page, Click the **Home** link.

16. Click the Report Number.
17. Click the zhre091_9846153.csv link.

18. Click on the report link.
   For example purposes, Click the Report ZHRE091 link.

19. Congratulations! You have completed the training on how to run the Compensatory Time Report.

   End of Procedure.
Report - Semi-Monthly Timesheets

In this topic you will learn how to run the Semi-Monthly Timesheets report. This report will only produce a blank paper timesheet for the selected employees. It is not expected that this report will be used extensively by most departments.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure


1. Click the Main Menu button.

2. Click the Manager Self Service menu.

3. Click the Manager Dashboard menu.

4. Click the Absences, Time and Labor link.

5. Click the Semi-Monthly Timesheets link.
6. Click the **Search** button.

7. Click the **SEMI_TIMESHEETS** link.

8. Click the **Run** button.
9. Click the **OK** button.

![OK button]

10. Click the **Process Monitor** link.

![Process Monitor link]

11. Click the **Refresh** button.

![Refresh button]

12. Click the **Home** link.
13. Click the **Main Menu** button.

14. Click the **Reporting Tools** menu.

15. Click the **Report Manager** menu.

16. Click the **ZTLR007** link.

17. Congratulations! You have completed training on how to run a Semi-Monthly Timesheet report.

   **End of Procedure.**
Queries - APO/Librarian Vacation History

This report is for reporting purposes only. There is no 'bank of hours' or an 'accumulating accrual' that is reduced when an entry is keyed nor is the entry set to go through any approval process. The vacation hours are keyed directly to the time sheet and this report can be run as a tracking tool.

In this topic you will learn how to run the APO/Librarian Vacation History report.

---

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

---

Procedure

Navigation Path: Log on to PeopleSoft HCM

1. For those that do not have a Manager Dashboard, you can also navigate to the PS Queries page directly within PeopleSoft HCM.

   Navigation Path to initiate a query: Main Menu > Reporting Tools > Query > Query Viewer > ZTL_MGR_APO_LIB_VACATION

   Reports generated through PS Query viewer will have the ability to export to an excel spreadsheet format.
2. Navigate to the Time and Labor WorkCenter under Quick Links on your Manager Dashboard.

   Click the **Time and Labor WorkCenter** link.

3. Click the **Reports/Processes** link.
4. Click the **APO/Librarian Vacation History** link.

5. **Department Ranges**
   Will only display information related to the range of Department ID's specified.

   If left blank and the suggested entry 'for all' is entered, the report will display information based on all Department ID's you have security access to.

   Enter the 'for all' option for all other search criteria fields with the exception of the date field.

6. Choose any date you choose to review.

   Click the **Choose a date (Alt+5) from the calendar** button.

7. Click the **View Results** button.
8. The Report will display on screen. It includes the following information:

- Employee ID
- Employee Record
- Last Name of employee
- Faculty
- Department ID
- Department Name
- Date the Vacation was reported
- Time Recording Code
- Time Recording Code Description
- Quantity of Vacation Hours Taken

9. Congratulations! You have completed training on how to run a Query for APO/Librarian Vacation History.

End of Procedure.
Queries - Banked Time Summary Report

Banked Time or Compensatory Time refers to time off that is granted to an employee as compensation for working overtime. Such compensatory time is calculated in the same manner as overtime pay.

In this topic you will learn how to run the Banked Time Summary report.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Log on to PeopleSoft HCM

1. For those that do not have a Manager Dashboard, you can also navigate to the PS Queries page directly within PeopleSoft HCM.

    Navigation Path to initiate a query: Main Menu > Reporting Tools > Query > Query Viewer > ZTL_MGR_BANKED_TIME_SUMMARY

    Reports generated through PS Query viewer will have the ability to export to an excel spreadsheet format.
2. Navigate to the Time and Labor WorkCenter under Quick Links on your Manager Dashboard.

Click the **Time and Labor WorkCenter** link.

3. Click the **Reports/Processes** link.

4. Click the **Banked Time Summary Report** link.
5. **Department Ranges**
Will only display information related to the range of Department ID's specified.

If left blank and the suggested entry 'for all' is entered, the report will display information based on all Department ID's you have security access to.

Enter the 'for all' option for all other search criteria fields with the exception of the date field.

6. For example purposes,

Enter all search fields with the default criteria for all.

7. Click the **View Results** button.
8. The Report will display on screen. It includes the following information:

- Employee ID
- Employee Record
- Last Name of employee
- Faculty
- Department ID
- Department Name
- Job Title
- Time Recording Code
- Time Recording Code Description
- Whether the hours were Earned or Taken
- The Date of the occurrence
- Quantity of Hours Earned or Taken
- Balance of the Banked Hours and the Month

9. In this example, the employee has a Banked Time balance of -4.75 Hours.

10. Congratulations! You have completed training on how to run a Query for the Banked Time Summary Report.

   **End of Procedure.**
Queries - Leave Balance Negative

A leave balance can, at some point, go into the negative. In this topic you will learn how to run the Leave Balance Negative report.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Log on to PeopleSoft HCM

1. For those that do not have a Manager Dashboard, you can also navigate to the PS Queries page directly within PeopleSoft HCM.

   Navigation Path to initiate a query: Main Menu > Reporting Tools > Query > Query Viewer > ZTL_MGR_LEAVE_BAL_NEGATIVE

   Reports generated through PS Query viewer have the ability to export to an excel spreadsheet format.
2. Navigate to the Time and Labor WorkCenter under Quick Links on your Manager Dashboard.

Click the **Time and Labor WorkCenter** link.

3. Click the **Reports/ Processes** link.

4. Click the **Leave Balance Summary report** link.
5. **Department Ranges**  
Will only display information related to the range of Department ID's specified.

If left blank and the suggested entry 'for all' is entered, the report will display information based on all Department ID's you have security access to.

Enter the 'for all' option for all other search criteria fields with the exception of the date field.

6. For example purposes,

Enter all search fields with the default criteria for all.

7. Click the **View Results** button.
8. The Report will display on screen. It includes the following information:

- Employee ID
- Employee Record
- Last Name of employee
- Faculty
- Department ID
- Department Name
- Job Title
- Leave Short Name Title
- The date of the leave
- Leave Balance


End of Procedure.

Queries - Multiple Job Employees

Often times an employee will work for several departments at any one time. PeopleSoft HCM security will limit who the Department HR Contact and Supervisor are able to see a time sheet for or have access to. This report will give you the name of the Supervisor in a multiple job relationship for all employees who are your Direct Reports.

In this topic you will learn how to run the Multiple Job Employees report.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.
Procedure

Navigation Path: **Log on to PeopleSoft HCM**

1. For those that do not have a Manager Dashboard, you can also navigate to the PS Queries page directly within PeopleSoft HCM.

   Navigation Path to initiate a query: **Main Menu > Reporting Tools > Query > Query Viewer > ZTL_MGR_MULTIPL_E_JOB_EMPS**

   Reports generated through PS Query viewer will have the ability to export to an excel spreadsheet format.

2. Navigate to the Time and Labor WorkCenter under Quick Links on your Manager Dashboard.

   Click the **Time and Labor WorkCenter** link.
3. Click the **Reports/Processes** link.

4. Double-click the **Multiple Job Employees** link.

5. The search criteria is embedded in the report, therefore selection criteria isn’t required.

   The report return may take a few minutes.

6. The Report will display on screen. It includes the following information:

   - Employee ID
   - Employee Record
   - Last Name of employee
   - Department ID
   - Department Name
   - Other Supervisor Empl ID
   - Other Supervisor Position Number
   - Other Supervisor Name

7. Congratulations! You have completed training on how to run a Query for the Multiple Job Employees Report.

   **End of Procedure.**
Queries - My Pending Time Approvals

In this topic you will learn how to run the My Pending Time Approvals report.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Log on to PeopleSoft HCM

1. Navigate to the Time and Labor WorkCenter under Quick Links on your Manager Dashboard.

   Click the Time and Labor WorkCenter link.
2. Click the **Reports/Processes** link.

3. Click the **My Pending Time Approvals** link.

4. Enter the date of the current Pay Period end date.

    For example purposes, select April 30, 2017
5. Click the **View Results** button.

![View Results Button]

6. The Report will display on screen. It includes the following information:

   - Employee ID
   - Employee Record
   - Last Name of employee
   - Department ID
   - Department Name
   - Time Reporting Code (TRC)
   - TRC Description
   - Quantity of Hours reported
   - Reported Date
   - Payable Status
   - If hourly rate was overridden, the new rate will display here
   - If a Combo Code was overridden, the new Combo Code will display here

7. Congratulations! You have completed training on how to run a Query for My Pending Time Approvals Report.

**End of Procedure.**
Queries - My Pending Time Exception Errors

In this topic you will learn how to run the My Pending Time Exception Errors report.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Log on to PeopleSoft HCM

1. For those that do not have a Manager Dashboard, you can also navigate to the PS Queries page directly within PeopleSoft HCM.

   Navigation Path to initiate a query: Main Menu > Reporting Tools > Query > Query Viewer > ZTL_MGR_PENDING_EXCEPTION_ERR

   Reports generated through PS Query viewer will have the ability to export to an excel spreadsheet format.
2. Navigate to the Time and Labor WorkCenter under Quick Links on your Manager Dashboard.

Click the **Time and Labor WorkCenter** link.

3. Click the **Reports/Processes** link.

4. Click the **Pending Time Exception Errors** link.
5. Enter the Pay Period start date.

6. Enter the Pay Period end date.

7. For example purposes,

Enter all search fields with the default criteria for all, except the From and To dates.

8. Click the View Results button.

9. The Report will display on screen. It includes the following information:

   • Employee ID
   • Employee Record
   • Last Name of employee
   • Faculty
   • Department ID
   • Department Name
   • Exception ID
   • Date Under Report
   • Exception Status - High or Low
   • Exception Description

10. Congratulations! You have completed training on how to run a Query for the Pending Time Exception Errors Report.

    End of Procedure.