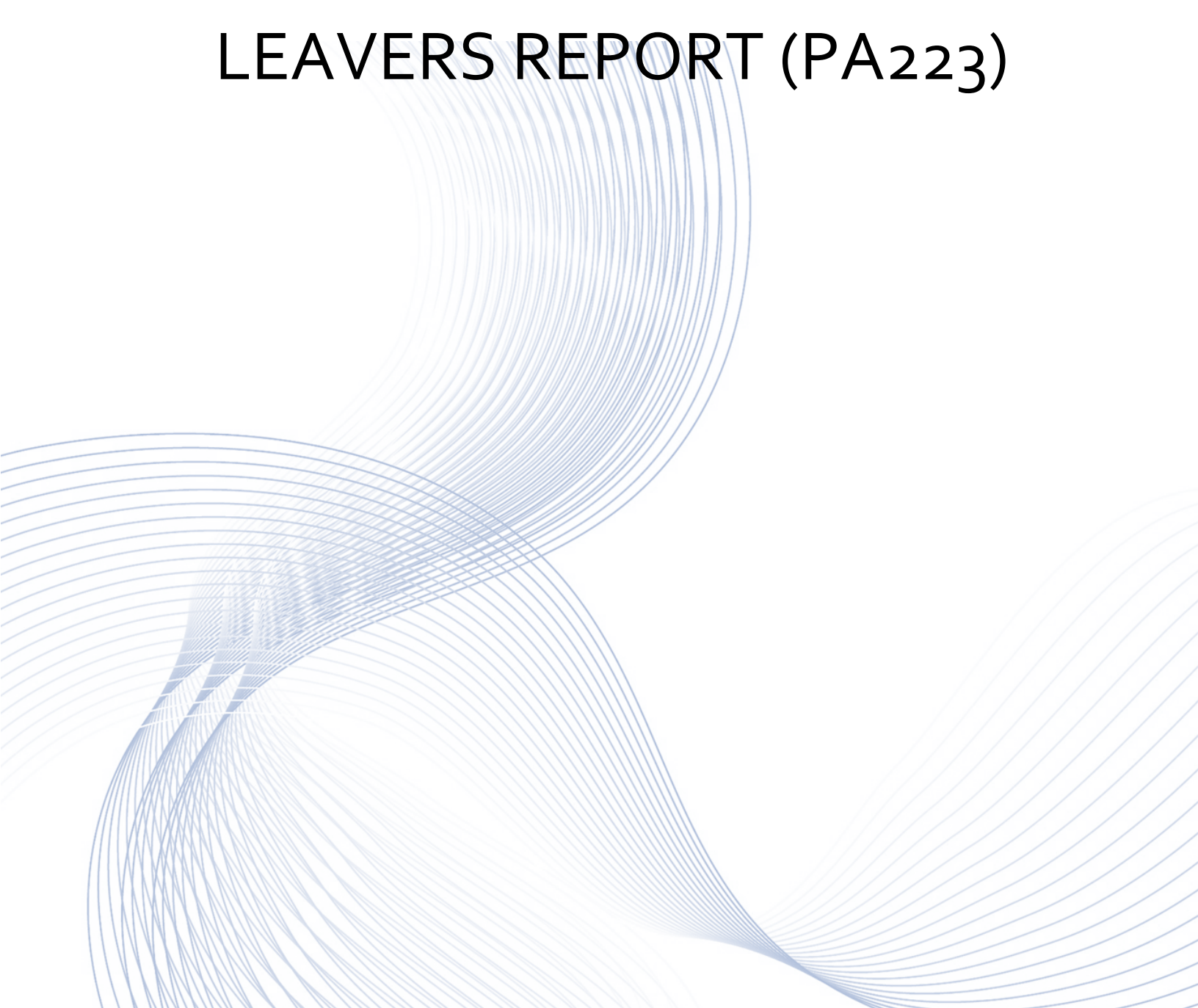


HRIS – Human Resources Information Solution

**RESOURCE GUIDE: AGENCY
HCM VIEW - STARTERS AND
LEAVERS REPORT (PA223)**



AGENCY HCM VIEW - STARTERS AND LEAVERS REPORT (PA223)

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Introduction

The Starters and leavers Report (PA223) is available to assist in easily identifying employees that are hires, rehires or separations.

Report Criteria

- Allows you to report on Hires, Rehires, Separations or any combination, both Starters and Leavers
- Limits reports on employees to a specific process level, department, or employee group
- Employees can be selected on the basis of specified personnel action codes and/or action reasons or, based on their logged hire date / adjusted hire date or termination date
- Use up to 10 Personnel Action Codes and / or Reasons to identify hires and separations.
- Employee reports can be selected either on the basis of the Effective date of the change or the System Date the employee record was actually updated. The System Date option is useful if you make many retroactively effective changes
- Multiple report sorting options
- Create a CSV file of employee detail for ad-hoc use by customers.

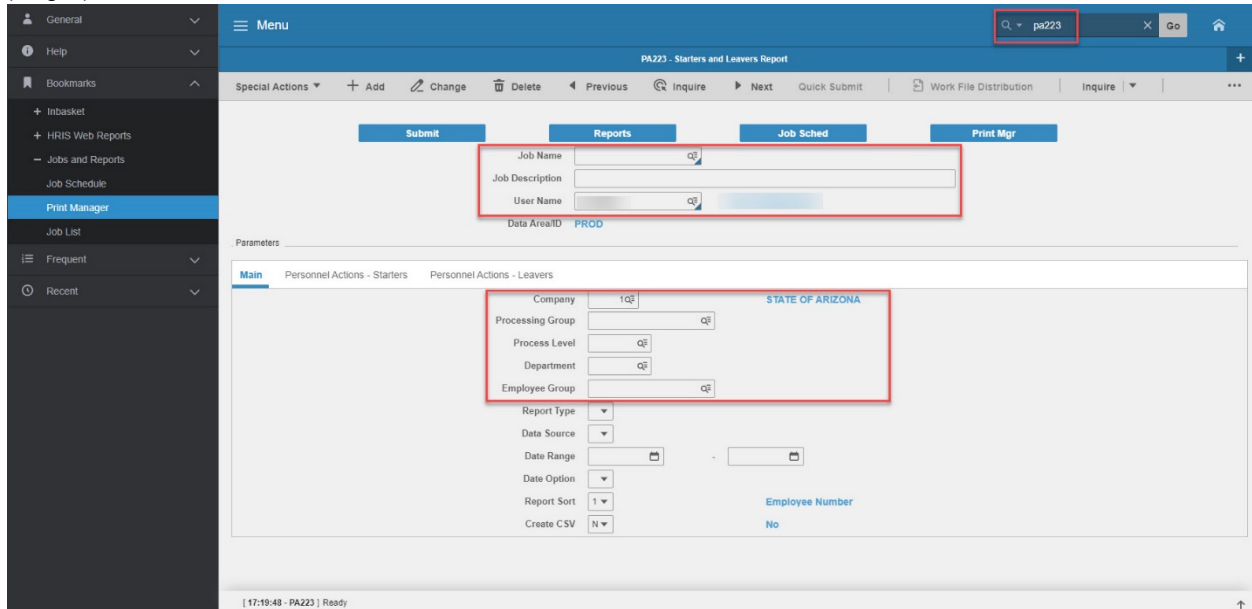
Report Content

PA223 Starters & Leavers Report includes the following information:

- Employee Name and Employee Identification Number (EIN)
- Process Level, Department, Job Code and Class
- Categorized by Type (Starter/Leaver)
- Date options defined by parameters
- Data by Personnel Actions and Personnel Reason Codes, as defined by parameters
- The ability to create a CSV file

Starters and Leavers Report (PA223) – Parameters – Main tab

(Image 1)



Steps 1-9 of 15

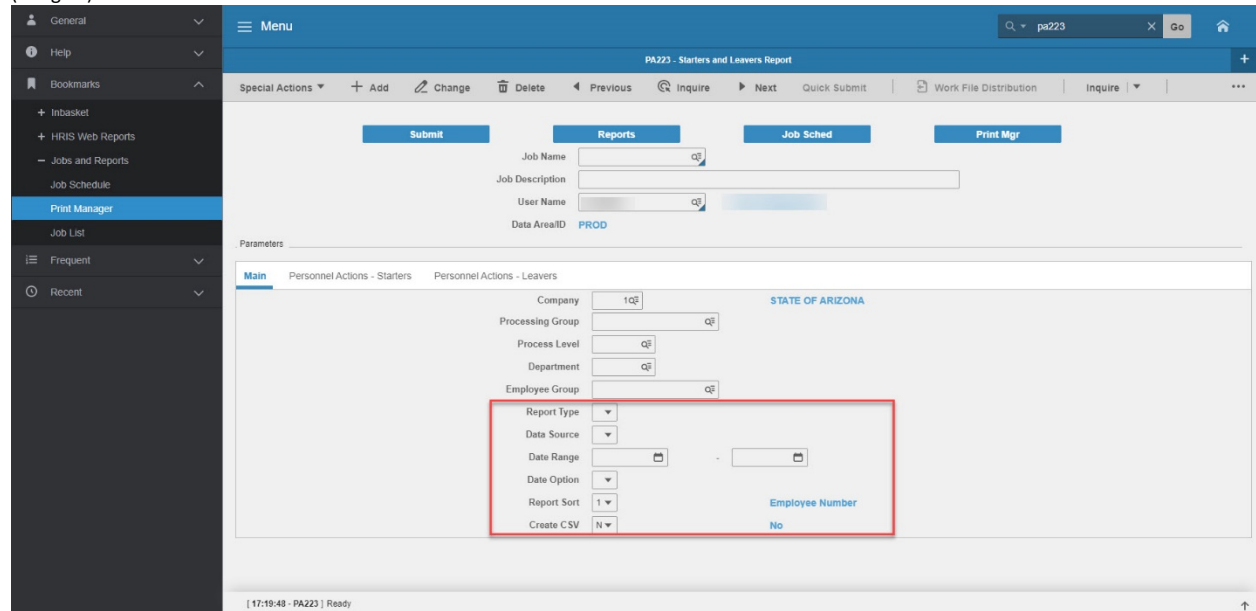
(Image 1, Table 1)

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|-----|------------------------------|------------------------------|--|---|---|
| 1 | Search Box | R | Type PA223 in the Search Box. Press ENTER on the keyboard. | The Starters and Leavers Report (PA223) opens. | |
| 2 | Job Name Field | R | For a new report, type a unique name for the job. To use an existing report, you can select a previously defined job from the Drill Around. The jobs displayed are for the active user, displayed in the User Name field. | Job Name is established for the resulting report. | You can define different sets of parameters for the same report by using alternate job names. For example, you can inquire on an existing job name, change the parameters values, type in a new job name and use the CHANGE button. Each job defined for a particular user must have a unique name. |
| 3 | Job Description Field | O | Type a description of the job. | A Job Description will display. | The job description helps you identify a batch job by providing additional information about the job name. |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|-----|-------------------------------|------------------------------|---|--|--|
| 4 | User Name Field | R | No Action. System autofills. | The active user login displays. | To display, define, or manage jobs for another user, you must be a Superuser, Lawson Administrator, Security Officer or Class Supervisor with access to the product lines and system codes for all steps in a job. |
| 5 | Company | R | Type 1 in Company Field | System will access information for Company 1. | All forms/actions must contain a 1 in the Company Field. |
| 6 | Processing Group Field | O | Leave Blank | | Processing Groups are not used for reporting in HRIS |
| 7 | Process Level Field | O | Select Process Level from the drop down list | Report will generate data from the chosen Process Level | You can only access data from the Process levels that you have security access too. |
| 8 | Department Field | O | Select Department from the drop down list | Report will generate data from the chosen Department. | You can only access data from the Departments that you have security access too. |
| 9 | Employee Group Field | O | Select Employee Group from the drop down list | Report will generate data from the chosen Employee Group | |

Starters and Leavers Report (PA223) – Parameters – Main Tab

(Image 1)



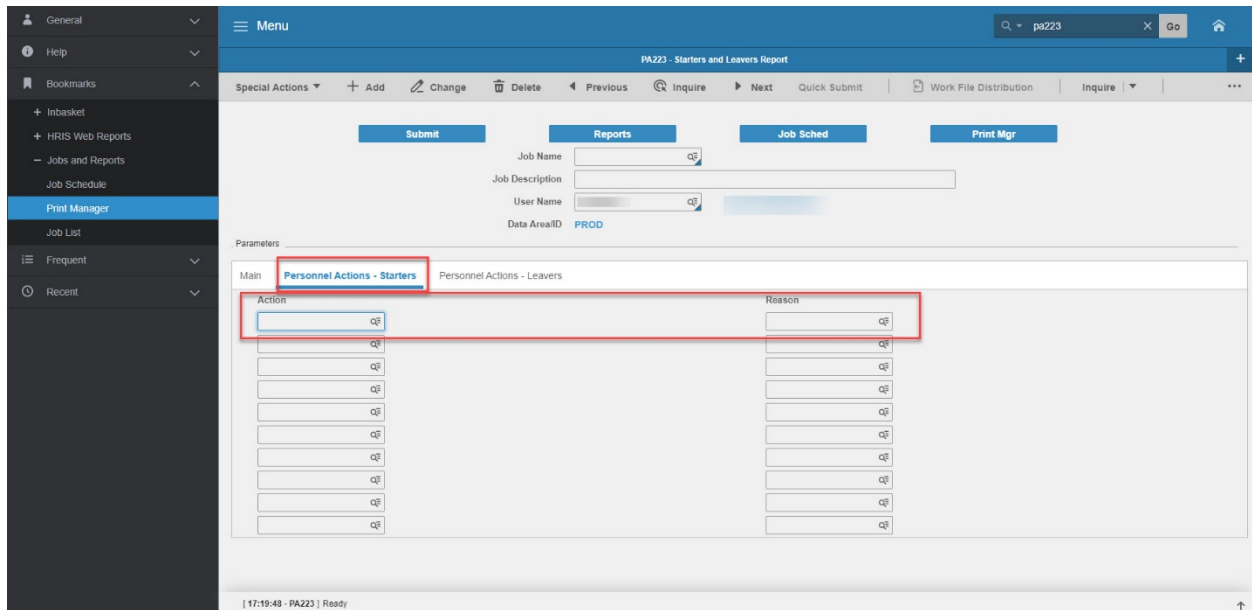
Steps 10-15 of 15

(Image 1, Table 2)

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|-----|--------------------|------------------------------|---|--|--|
| 10 | Report Type | R | Click to choose a specific type of report from the drop down list | | Valid values are: Starters Leavers Starters and Leavers |
| 11 | Data Source | R | Click to choose the data source. You can choose from either Personnel Actions or specified dates. | | Valid values are: • Personnel Actions • Hire; Adj. Hire; Term Date |
| 12 | Date Range | O | Enter a date range for your data, if applicable | Data will be pulled from the date given | |
| 13 | Date Option | R | Choose Effective Date of System Date of Change from the drop down list. | Report data will be displayed by either Effective date or date posted to system. | Valid values are: Effective Date- effective date of the actions System Date of the change – date the data was keyed/processed in the system. |
| 14 | Report Sort | R | Choose sorting options for the report from the drop down list. | Report will be sorted in the appropriate manner. | |
| 15 | Create CSV | R | Y/N | | Allows CSV export. |

Starters and Leavers Report (PA223) – Parameters – Starters Tab

(Image 2)



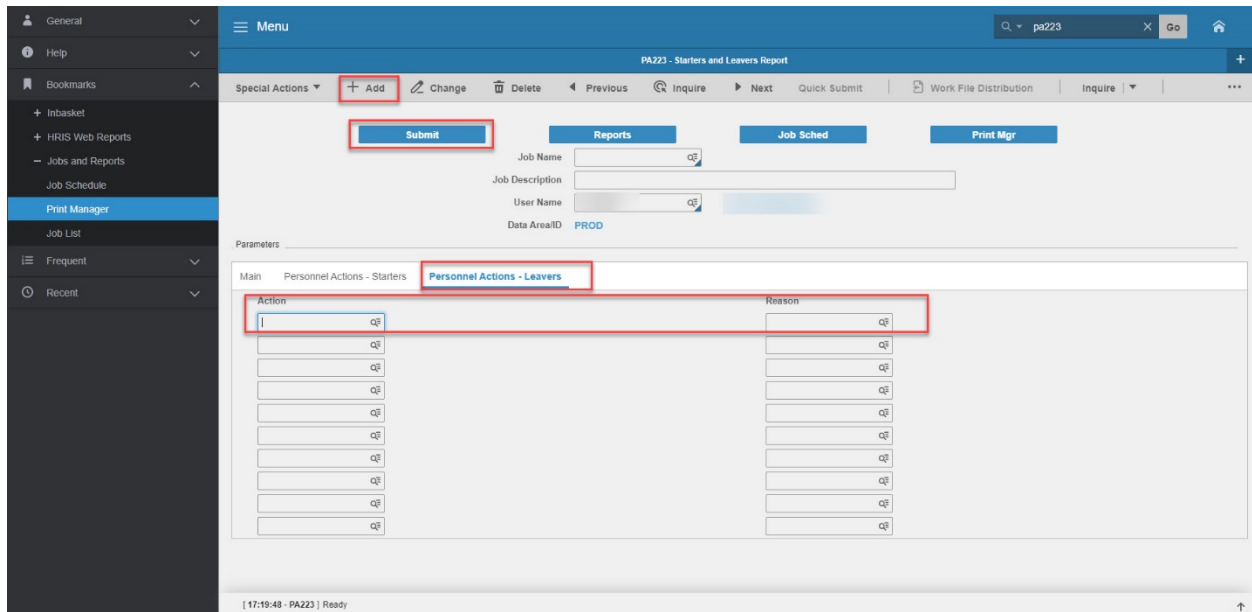
Steps 1-2 of 2

(Image 2, Table 1)

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|-----|--|------------------------------|--|------------------|--|
| 1 | Personnel Actions - Starters Tab | R | Select the action code or codes to use to select report information. | | If a value is entered in this field, actions with this action code are selected. |
| 2 | Action field Reason field | R O | APP-HIRE 1 REHIRE Do not use HIRE-REHIR2 or HIRE-REHIR3. | | If a value is entered in this field, actions with this action code are selected. If a reason code is entered on the same row, then actions are selected ONLY if they also used the corresponding reason code (either as a Reason 1 or Reason 2) |

Starters and Leavers Report (PA223) – Parameters – Leavers Tab

(Image 3)



Steps 1-10 of 10

(Image 3)

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|-----|--|------------------------------|---|---|--|
| 1 | Personnel Actions – Leavers Tab | R | | | If a value is entered in this field, actions with this action code are selected. |
| 2 | Action field Reason field | R O | SEPARATION Do not use INTRAGYTFR | | If a value is entered in this field, actions with this action code are selected. If a reason code is entered on the same row, then actions are selected ONLY if they also used the corresponding reason code (either as a Reason 1 or Reason 2) |
| 3 | Add button | R | Click Add to save your report | See 'Job Added' in the lower left corner. | To see results you must submit the report to HRIS to process. |
| 4 | Submit Job button | R | Click Submit to process job. Job Submit pop-up | Receive message "Job has been submitted". | You must have clicked 'Add' or 'Change' to save the report parameters in |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|-----|---|------------------------------|--|--|---|
| | | | will displays Click Submit button again. | | HRIS BEFORE clicking Submit. |
| 5 | Job Scheduler link Active Jobs Waiting Jobs Completed Jobs | R | Click Job Scheduler to check the status of a job. Click on Active , Completed or Waiting to see the status of your Job. | This will take you to the Job Scheduler. Use the job schedule to determine the current status of your job. Queue refreshes automatically. To be available for display, report job must be in Normal Completion status. | Job must be in Normal Completion and appear in the Completed tab to be available to view under the Print Manager. You cannot view report results through the job scheduler, you can only view the status of the report job. The filter options available are: <ul style="list-style-type: none"> • Active –your job is processing in HRIS. • Completed – your job has finished processing and is ready for review • Waiting – you job is waiting to be processed or may need recovery. If your job states ‘needs recovery’ contact HRIS for assistance. To see the results you must access the Print Manager bookmark. |
| 6 | Print Manager | R | Click on Print Manager to access report results: Reports – this queue will display all the reports you have processed. | Print Manager will display your reports. | |
| 7 | Report Name | R | Locate the row for the job you would like to view. | All completed report jobs will be displayed in this queue. | This field not used by HRIS |
| 8 | Report Actions: | | You can display report results one of | Depending on the | You should never resubmit a job to process |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|-----|---|------------------------------|---|---|---|
| | <p>View Print Delete</p> | | <p>two ways: Click anywhere on the display line for the report, click your right mouse button and select 'View' from the drop down menu. Or Click the select box at the beginning of the report line and click 'View' under related actions. Click Delete to delete the specific highlighted job. To delete multiple jobs. All jobs must have a check mark in the select box to be included in the delete.</p> | <p>action performed, you will either see additional information, or be asked to confirm an action Delete. System will ask for confirmation to delete, Click OK. File is deleted</p> | <p>while that job is processing (it is in active or waiting status). Please allow the first job to process before resubmitting.</p> |
| 9 | <p>View Options is to display your results in PDF format</p> | R | <p>Click on drop down and select the option for your report results.</p> | <p>Report results will open.</p> | <p>View Options, report results will display in a different format: Text will display in Excel Spreadsheet. PDF Landscape or Portrait will display in Adobe Acrobat. - PDF view will be used to print results or save the report to your hard drive. - PDF Condensed 158, 198, 233 will minimize your report When displaying the report file, regardless of the view option, HRIS will display the selection criteria as the first page of the report. You must page down to see report</p> |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|-----|---|------------------------------|---|---|---|
| | | | | | results. Once in PDF view, you can click the print button or the save button to perform these additional actions on your report results. |
| 10 | Create CSV File to display your results in a spreadsheet | O | Click to export results into a spreadsheet. | Results will display in a Excel Spreadsheet | Once in Excel you can save your report and manipulate your criteria. |

Results of the Starters and Leavers (PA223), Report Image

(Image 4)

Starters and Leavers Report

```

PA223 Date: 01/25/20          JOB SUBMISSION PARAMETERS
Time: 22:09

User Name: ██████████
Job Name: PA223
Step Nbr: 1

Main
      Company:          1
Processing Group:
Process Level: ██████████
Department: ██████████
Employee Group:
Report Type: 1
Data Source: 1
Date Range: 010120 - 012520
Date Option: 1
Report Sort: 1
Create CSV: Y
Personnel Actions - Starters
Action          Reason
JOB CHANGE     JC-PROMO
JOB CHANGE 1 OF 2  JOB CHANGE PROMOTION

Personnel Actions - Leavers
Action          Reason

Your CSV output was written to: /prod/lawson/apps/prod/work/PA223CSV/PA223CSV
    
```