HRIS – Human Resources Information Solution

RESOURCE GUIDE: AGENCY HCM VIEW - HR WRITER (FORMS: HR65.1, HR65.2, HR65.3, HR65.4, HR65.5, HR65.6, HR70, HR170, XH64.1)

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Table of Contents

Introduction

HRIS offers many standard and on-demand reports. If you have reviewed these reports and find that they do not address the specific needs of your agency, HR Writer may be the answer. HR Writer forms can be used to create new HRIS reports to meet agency specific needs.

This course will discuss the six HR Writer forms used to produce a basic HR Writer report. The forms include:

- HR Writer Title Creation (HR65.1)
- HR Writer Format Item Selection (HR65.2)
- HR Writer Format Item Order (HR65.3)
- HR Writer Print Order (HR65.4)
- HR Writer Population Selection (HR65.5)
- HR Writer Population Criteria (HR65.6)

There are additional forms in the HR Writer process, but these are used to create more complex reports. These additional forms will be discussed in the Advanced HR Writer Course.

Notes:

- *The HR Writer Forms may look similar, but they each serve very different functions. You will improve your ability to create and troubleshoot HR Writer reports if you focus on understanding how each form functions.*
- *When you run reports at your agency, your report results will only include data authorized by your HRIS job role.*
- *If you are not currently assigned to a job role, your report will be blank.*

HR Writer Flow Chart

The HR Writer Forms must be **completed in a specific order** to successfully create and run a report. You must complete the forms in this order. Some of the forms are required for every HR Writer report, and some forms are options – depending on the purpose of the report.

The flow diagram in Figure 1 presents the forms, the required order and their overall purpose for HR Writer reports. The diagram also indicates whether the form is required or optional.

Required forms appear as:

> HR Report Writer
> Title Creation
> HR65.1

Optional forms appear as:

> HR Report Writer
> Title Creation
> HR65.1

Figure 1
BASIC FLOWCHART

Form Name	Form Function
HR Report Writer Title Creation HR65.1	
Format Data Items HR65.2	What will display?
Format Order HR65.3	
Print Order HR65.4	How will it display?
Population Selection HR65.5 — Population Criteria HR65.6	Who will it display?
HR Writer Inquiry HR70 — HR Writer Report Request HR170	Display Results/ Run Report
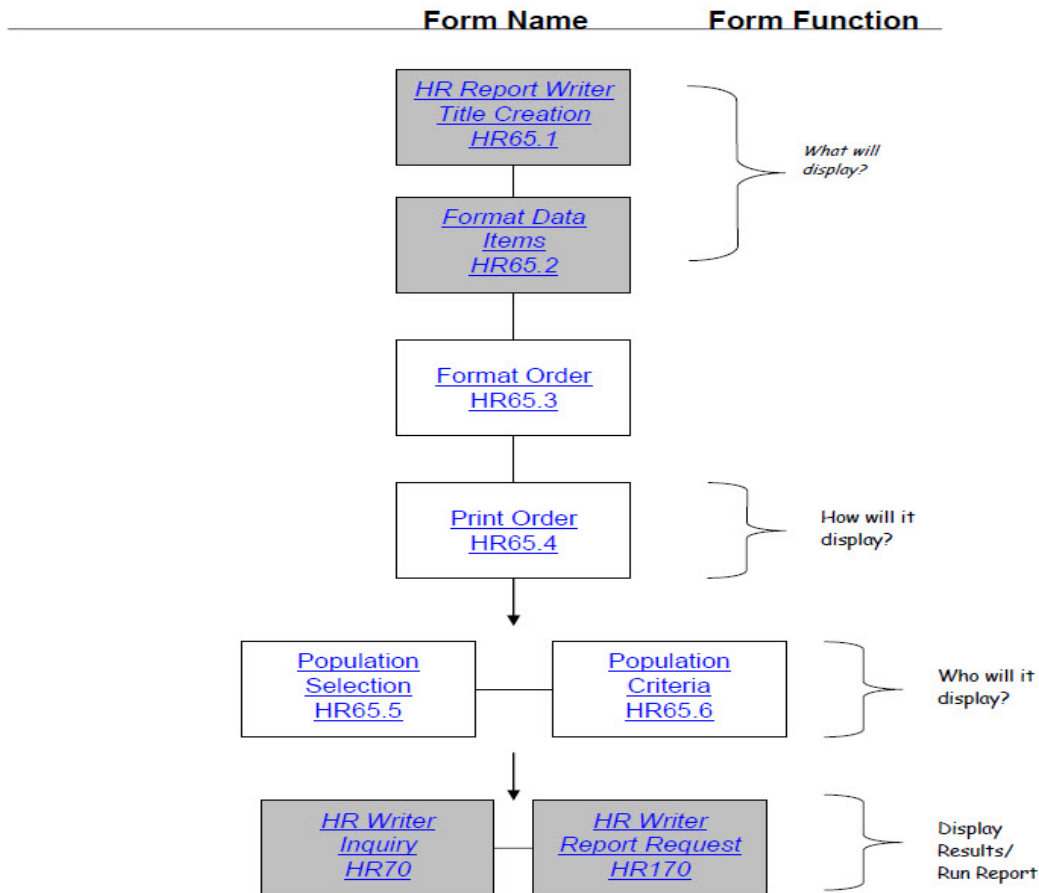
HR Writer Title Creation (HR65.1) – First Form
(Image 1)
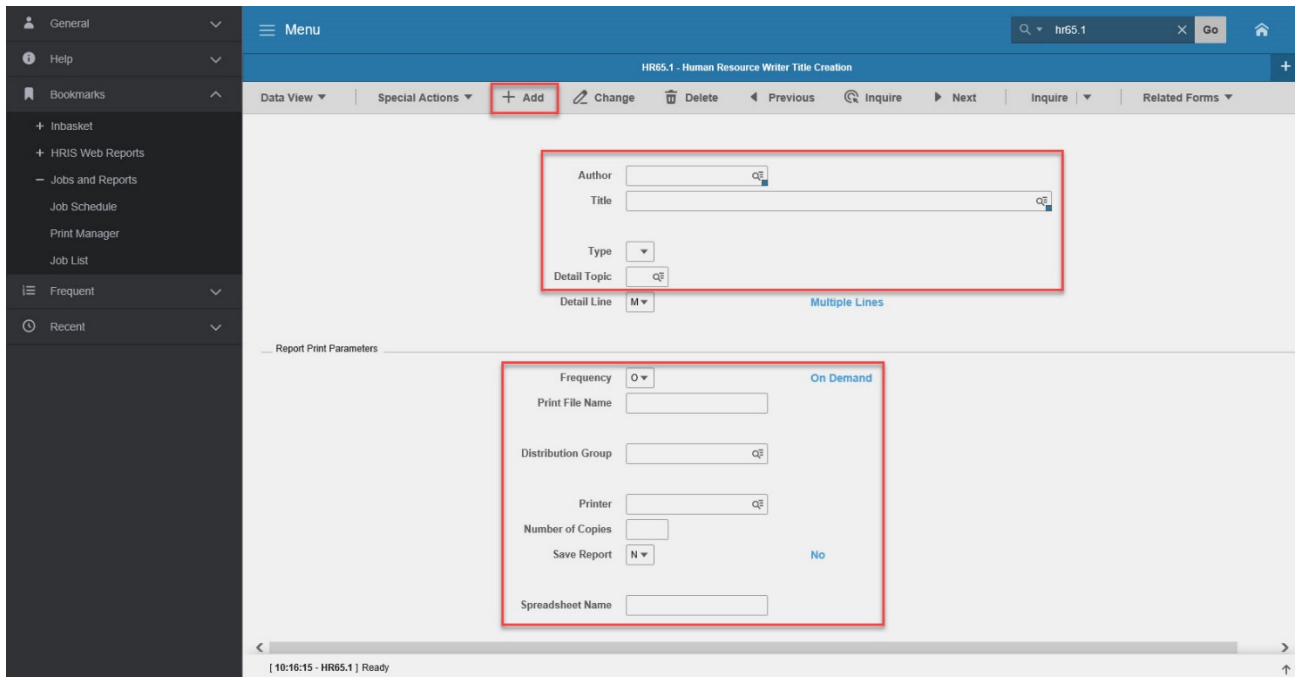
Steps 1-9 of 9
(Image 1, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Author** field	R	Select from the drop down list. Authors will be predefined in the HRIS system.		Authors are used to group report titles together. Reports within a specific author can be run concurrently. **Example** – If all HR reports are grouped under one author, that author can then submit report criteria and run all HR reports together. Authors will be setup with a 2-digit agency code, followed by 6 functional areas (HR, PR, BN, BUD, GL and MGT). You should create your report in the author for

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					your agency and the functional area that describes the report topic.
2	**Title** field	R	Type a report title for the report you are going to create. You must define a unique title for each new HR Writer Report.	If you click the drop down arrow you will see all existing titles that have been created under the specified author.	**Tips** The title can be up to 30 characters. The name can include spaces. The more descriptive the title, the better all users will understand what the report contains. **Example** - A title of "Lisa's Report" doesn't give the user any information about the report. A more descriptive title of "Payroll Dept List of New Hires" describes the intended report content. **When naming a report, you should title the report so that another user will understand what is in the report.** Each Agency should consider establishing some naming conventions if they want to make their reports reusable.
3	**Type** field	R	Select report Type from the drop down list. You must associate each HR Writer report with a single report type.		The type field determines the data that is available when you build your HR Writer report. You must select a report type when you create an HR Writer Report. The available report types are: ○ (E) – Employee – this options yields

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					results that include all current employee information including deductions, benefits, etc. ○ (H) – History – this option yields results from historical data such as payroll payments and benefits compensation history. The History option is used in more advanced HR Writer reports and is not covered in this training session. ○ (A) – Applicant – this option yields results from all current applicant information. Due to the states limited usage of applicant tracking, this option is not used.
4	**Detail Topic** and **Detail Line**	O			No action.
5	**Frequency** field	R	Select a Frequency from the drop down list.		Frequency is used to define when the reports will be run. **This field defaults to O (On Demand).** **Notes** Other Frequency options are: W = Weekly, M = Monthly, Q = Quarterly, and A = Annually Frequency options other

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					than "O" are used to define a frequency for routine processing of reports. Routine processing is typically defined by more advanced HR Writer users. **Example** – Several reports under the same author are defined with a frequency of Monthly. That author could select parameters that would generate all Monthly reports by submitting only one HR Writer Job.
6	**Print File Name**	O	Type a unique name. This name appears in the print manager when you run HR170.		If you do not provide a Print File Name, HR Writer will create one. HR Writer will use the first word or the first 10 characters of the Title as the Print File Name.
7	**Distribution Group, Printer, Number of Copies and Save Report**	O	Leave these fields blank.		Fields are not used by the State of Arizona.
8	**Spreadsheet Name**	R, if creating a CSV file	Type a spreadsheet name. This field is required if you want to create a CSV file that contains the results of the report.		**Notes** • Will not allow any spaces • See Appendix D – Creating a CSV File for additional information on creating a CSV file.
9	**Add** button	R	Click **Add** to save.	Will be automatically taken to next form.	

HR Writer Format Item Selection (HR65.2) – Second Form

The HR Writer Format Item Selection Form (HR65.2) contains different topics that will allow you to access information on the Employee Master Record (HR11.1)

Use this form to select the fields to display on your HR Writer Report. **At least one field must be selected to see any results.**

Notes:

- *Fields listed in the "Items to Select" section appear in alphabetical order. Use PageDown or PageUp to access additional data items.*
- *Select fields by typing an "X" ( ) in the Select field or click the drop down box.*
  - *To delete a field from your results (field displays in Selected Items), remove the "X" from the Select field.*

(Image 2)

Steps 1-4 of 4
(Image 2, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Topic** field	R	Select a Topic from the drop down list to display the various data items available.		Click the Inquire button to view all the items within that topic. Items will appear in the 'Items to select' section of this form. The type (see Page 6 for description of type) assigned on the HR Writer Title Creation Form (HR65.1) determines which topics are available. The data items for the topic appear in the 'Items to Select' section of the form. Advanced Users If you selected Summarized Line in the Detail Line field of HR65.1, only numeric non-date fields associated with the detail topic selected are available. This is because HRIS cannot summarize (total) an alpha or numeric date field. If you select Multiple Lines in the Detail Line field in HR65.1, you can select from all fields associated with the selected detail topic.
2	**Items to Select**	R			The Items to Select section displays all available data items for the Topic selected. Any of the fields that

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					appear can be selected to appear in your report. As data items are marked in the 'Items to Select' section, once the Add/Change button is clicked, those data items will move to the 'Selected Items' section of this form. **Advanced Users** If the Detail Topic field was not used on the HR65.1 (see page6 for additional information), the available data items or fields will be associated with the Employee Master Record (HR11.1). If a detail topic was selected on HR65.1, the fields associated with the detail topic will be defined on the HR Writer Detail Selection (HR65.7).
3	**Selected Items**	R		Displays the fields that have been selected to display on the report. (Field must show an "X" ( ) in the select box next to the title to be displayed).	**Notes** When the form is first opened (See graphic above), HRIS displays a number of fields with the label GE (General Information Topic). These data items or fields are prepopulated on new reports because they are the fields most commonly used in HR Writer Reports. To select a GE item, type 'X' in the select boxand click **Change**.

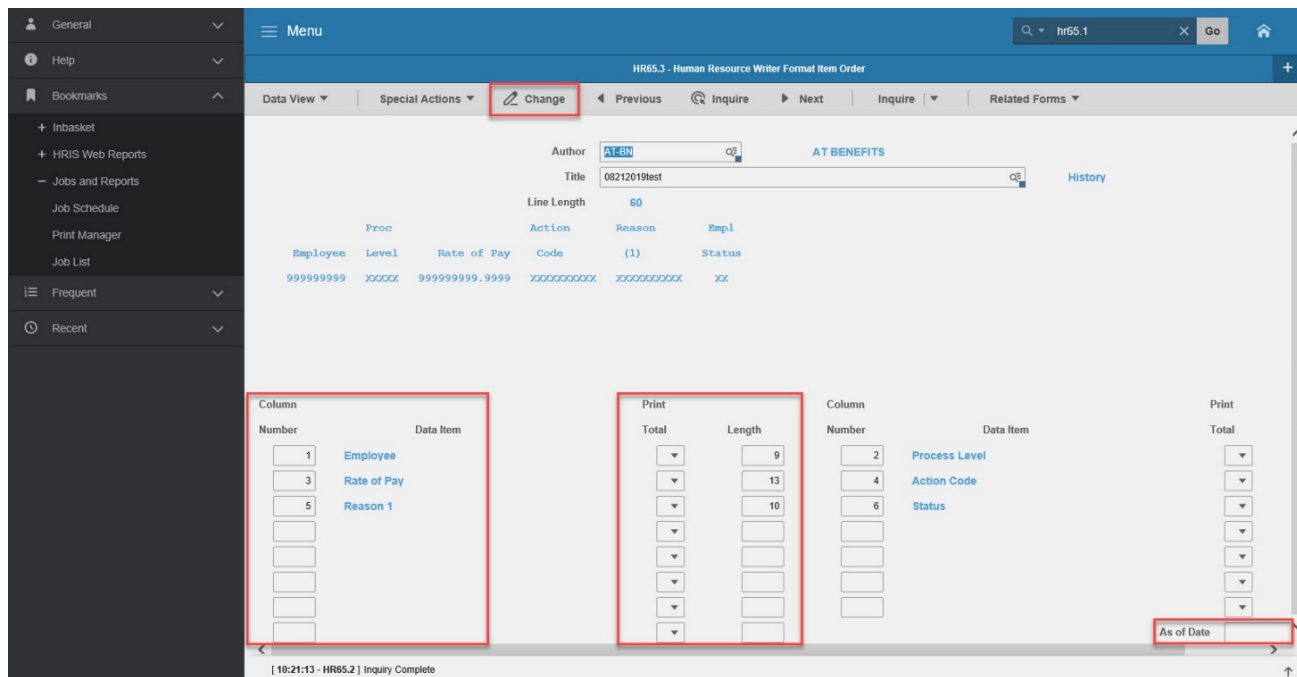| No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
4	**Add/Change** button	R	Click **Add/Change** to save your changes.		**Notes** • You should also click Change before performing a PageDown or PageUp, otherwise unsaved items marked with an "X" in the 'Items to Select' section will be lost. • If changes are lost, you can always go back and recreate your selections. • As you click Change on this form, the selected fields display in the top of the form.

HR Writer Format Item Order (HR65.3) – Third Form (optional)

This form is optional. The HR Writer Format Item Order Form (HR65.3) is used to organize the appearance of layout for your report results across the page.

Notes:
- *The data items selected on the HR Writer Format Item Selection Form (HR65.2) display on the lower half of the screen with column numbers automatically assigned.*
  - *The column numbers default to the order you selected the items in on the HR65.2.*
  - *Use this form to reorder the columns or change the length of the column on your report results.*
- *As you make changes and save those changes, the display on the HR65.3 will be automatically updated with the new column order/field lengths. The display will not change until you click Change.*

(Image 3)

Steps 1-5 of 5

(Image 3, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Col Nbr** field	R	Type a sequential number in the Column Nbr field that represents the		Example – Entering a 1 in the Col Nbr field next to Company indicates that this field will

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			order you want the data items to appear in the report results.		appear as the first column (from the left) on the report results. A 2 in the Employee field will place that information in the second column from the left, and so on. You can rearrange any of the fields displayed by changing their column number. **Notes** • Data items **cannot** have the same Column Nbr. If they do, you will receive an error message when you click **Change**. • If you click the Col Nbr field drop down arrow, the box contains the option "01:15". To continue HRIS needs you to type a number between 1 and 15 in the Col Nbr field.
2	**Print Total** field	O			You can total any numeric, non-date item on the report. If you want HRIS to total the data item, you must select an option in the Print Total field. **Notes** Options are: • (Y) – Yes. Total the column • (C) – Count. Count the

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					data items and include the count in the report. This is only valid if the data item is Employee or Applicant. • (R) – Repeat. Suppresses the data detail.
3	**Length** field	R	Type on the desired size of the data item results using the Length field.		**Notes** • HRIS defaults a minimum column length in each data item. If a 0 is entered or the field is left blank, HRIS will default to the minimum size for the data item. Any attempt to reduce the data item length too less than the minimum result in the minimum length defaulting. • HR Writer Report Request (HR170) produces a report that allows up to 190 characters per line; however, standard printers only support 132 characters per line. You will not see the changes in field lengths until you click the **Change** button. Once clicked, the display of the headings and the line length of the affected fields change.
4	**As of Date** field	N/A	Do not use this field.		

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
5	**Change** button	R	Click **Change** to save changes.		

HR Writer Format Item Order (HR65.4) – Fourth Form (optional)

This form is optional. The HR Writer Format Print Order Form (HR65.4) is used to sort the final report results (changing how the report will display down the page). The Print Order form functions the same way a sort feature works.

(Image 4)

Steps 1-6 of 6

(Image 4, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Topic** field	R	Select a topic from the drop down list to display the various data items available for sorting and totaling.		• Topics are limited to master topics and the detail topic specified on HR65.1 (see page 6 for additional information). Master topics include information from the Employee Master Record (HR11.1) and the Applicant Form

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					(PA31.1). • The options selected on HR65.4 may differ from the items selected on the HR Writer Format Item Select (HR65.2). • **Example** – On the HR65.2, you may select to display the Employee Number and Name. On the HR65.4 you might select your sort to be done by Process Level. The Process Level field does not have to be selected to display on HR65.2 to be used to sort your report results on HR65.4
2	**Items to Select** field	R	Select the data items to use in the result reports.		• To add an item, enter "X" (⬛▼) in the selected box or click the drop down arrow, then "Select" from the drop down box and click **Change**. **The maximum number of data items <u>that can be included</u> in the sorting for a report is 9.**
3	**Order** field	R	Change the sort order by changing the column numbers next to each data item. You can reorder the fields in any way by typing		**Example** – If you want to sort the results by Employees' Last Name, then Employee Number and Process Level, 1. Place an "X" next to these three fields in

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			sequential numbers in the Order field.		the 'Items to Select' area, 2. Click Change, 3. Type 01 next to Last Name, 02 next to Employee Number and 03 next to Process Level, then 4. Click Change. **Notes** • Data items **cannot** have the same Column Nbr. If they do, you will receive an error message when you click **Change**. • If you click the Col Nbr field drop down arrow, the box contains the option "01:9". To continue, HRIS needs you to enter a number between 1 and 9 in the field. • The system defaults to an Employee Number sort if nothing is entered on this form.
4	**Total** field	O			If data items were selected on HR Writer Format Item Order (HR65.3) to total, use this field to select the total option. The total option you select determines: The kind of total information printed, and Whether or not the report prints detail and totals, or only totals**.**

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					If no option is selected, totals do not print on the report. **Notes** Selection options are: o (Y) – Print column Totals – print detail with the columns. o (S) – Totals Only Suppress Detail and o (Z) – Averages Only Suppress Detail - used for suppressing data detail. These will be covered in more detail in Appendix A – HR Writer Tips (Page 30). o – Print Column Averages – print the report in detail with column averages. o (R) – Record Count Only – print only a record count of Employees and Applicants included in the sort level. You can select a different total option for each data item being totaled. The report then prints the item name and field value associated with the print order whenever the value changes.
5	**Page Break Level** field	O	Select the column number in the Order field where you want the report to begin a new pg.		To define a page break; select the column number in the Order field where you want the report to begin a new page.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
6	**Change** button	R	Click **Change** to save changes.		**Notes** • You should always click **Change** before performing a PageDown or PageUp, otherwise unsaved items marked with an 'X' in 'Items to Select' will be lost. • If changes are lost, you can always go back and recreate your selections. • As you click **Change,** the selected fields in 'Items to Select' move to the top of the form.

HR Writer Population (HR65.5) – Fifth Form (optional)

The HR Writer Population Selection Form (HR65.5) is different from the previous forms because it requires using two forms in conjunction to define the population you want to see in your report results. Both forms are optional in creating an HR Writer Report, but they provide the ability to define your results with better clarity.

First, use the HR65.5 to select the data items you want to specify criteria on. Then the HR Writer Population Criteria Form (HR65.6) will be used to define the criteria (rules) for the population. Employees satisfying the criteria will be included in the report results.

(Image 5)

Steps 1-4 of 4
(Image 5, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Topic** field	R	Select a topic from the drop down list. • Click the **Inquire** button to view all the items within that topic. Items will appear in the 'Items to select' section of this form.		Notes • The type (see Page 6 for description of type) assigned on the HR Writer Title Creation Form (HR65.1) determines available topics.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					Example – Create a report that shows EEO information for the dates between 01/01/2004 and 03/31/2004. • On the HR65.5, you would select 'Hire Date' from 'Items to Select'. •On the HR Writer Population Criteria (HR65.6) (Page 19) you would add a Beginning Value of 01/01/2004 and an ending value of 03/31/2004.
2	**Items to Select** field	R	Select the data items to use in the result reports.		• To add an item, enter "X" () in the selected box or click the drop down arrow, then "Select" from the drop down box and click **Change**. • Any of the fields that appear can be selected to use as criteria in your report. • As data items are marked in the 'Items to Select' section, and the Add/Change button is clicked, those data items will move to the 'Selected Items' section of this form.
3	**Selected Items** field	R			Includes the fields that have been selected to use when defining the population criteria. (Field must show an "X" ( ) in the select box to be selected). **Note** • To delete an item, remove the 'X' from the select box and click

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					Change. **The maximum number of data items that can be included in the population criteria definition for a report is 9.**
4	**Change** button	R	Click **Change** to save changes.		**Notes** • You should always click Change before performing a PageDown or PageUp, otherwise unsaved items marked with an 'X' in 'Items to Select' will be lost. • If changes are lost, you can always go back and recreate your selections. • As you click **Change**, the selected fields in 'Items to Select' move to the 'Selected Items' section of the form.

HR Writer Population Criteria (HR65.6) – Sixth Form (optional)

This form is optional and will only be used if data items were selected on the HR65.5 (See Page 17 for information). Use this form to assign criteria (valid values) to the data items selected.

Example – Create a report, which displays EEO information from Jan 1 – March 31 of 2004.

- On the HR65.5 – select the Hire Date.
- On this form, set criteria that Date must include 01/01/2004 to 03/31/2004.

(Image 6)

Steps 1-7 of 7

(Image 6, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**FC** field	R	Select whether you want to A – Add, C – Change or D – Delete a population criteria.		
2	**Data Item** field	R	Type the application-assigned number of the data item appearing in the top portion of this form, you want to define criteria		

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			for.		
3	**Inc Exc** field	R	Select whether the individuals meeting the selection criteria are (I) – included or (E) – excluded.		
4	**Beginning Value** field	R	Define the beginning value (if applicable) that you want the data item criteria to include/exclude.		
5	**Ending Value** field	O	Define the ending value (if applicable) that you want the data item criteria to include/exclude.		
6	**Item Group** field	O			This field functions as an "And/Or" feature to allow you to defined multiple different criteria groups the Employee must meet. To group the criteria, you will place an alpha or numeric character in the Item Group field, this character associates that criteria with others in the item group. •An "and" condition requires that an Employee meet the selection criteria of each and every consecutive data item with the same character. **Example** - if you want to include all Employees with A0 status hired between 01/01/1984 and 02/01/1984, you would select Status and Hire Date on the HR65.5. Then on the HR65.6, you would

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					define • Status (Data Item 1), Inc/Exc = I, Beginning Value = A0 and Item Group = A Hire Date (Data Item 2), Inc/Exc = I, Beginning Value = 01/01/1984, Ending Value = 02/01/1984 and Item Group = A • An "or" condition requires that an Employee meet at least one criteria in the different data item groups to be included. You can use an "or" condition to include or exclude data items with different item group characters. **Example** - if you want to include all Employees with A0 status hired between 01/01/1984 and 02/01/1984 that work in Dept A or Dept B, you would select Status, Hire Date and Department on the HR65.5. Then on the HR65.6, you would define -Criteria 1: •Status (Data Item 1), Inc/Exc = I, Beginning Value = A0 and Item Group = A •Hire Date (Data Item 2), Inc/Exc = I, Beginning Value = 01/01/1984, Ending Value = 02/01/1984 and Item Group = A •Department (Data Item 3), Inc/Exc = I, Beginning Value = Dept A and Item

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					Group = A -Criteria 2 •Status (Data Item 1), Inc/Exc = I, Beginning Value = A0 and Item Group = B •Hire Date (Data Item 2), Inc/Exc = I, Beginning Value = 01/01/1984, Ending Value = 02/01/1984 and Item Group = B •Department (Data Item 3), Inc/Exc = I, Beginning Value = Dept B and Item Group = B •All data items with "blank" in the Item Group are considered one item group following the "And" Condition.
7	**Change** Button	R	Click Change to save changes.		**Notes** • You should always click Change before performing a PageDown or PageUp, otherwise unsaved items will be lost. • If changes are lost, you can always go back and recreate your criteria. • As you click **Change**, the option defined in the 'FC' column disappears.

Note:
The Population Criteria is the last step in creating a basic ad hoc report. Use HR Writer Report (HR170) to run the report, or preview the results using HR Writer Inquiry Form (HR70.1.)

HR Writer Report Results (HR70.1 and HR170.1)

The HR Writer Inquiry Form (HR70.1) provides the ability to preview the results of the report online, while the HR Writer Report Request Form (HR170) shows the complete results, and provides the option to print the report.

(Image 7)

The HR Writer Inquiry Form allows you to run a preview of the report results used before creating the report and sending it to a printer. Use this form to check that the report sorts correctly and lists the appropriate Employees.

Be aware that this view has no formatting and is not how the final report will display.

Notes:

- *Company is a required field and must be included in order for the report to work. Company will always be Company '1' unless you are from ADOA Central Benefits.*
- *If the results show more employees than expected, check that the HR Writer Population Selection (HR65.5) (Page 17) and HR Writer Population Criteria (HR65.6) forms are defined correctly.*
    - o *Watch the include/exclude statement values.*
    - o *Watch for Employee status codes, i.e., leaving status criteria blank will return ALL Employees, including terminated staff.*
- *The HR Writer Inquiry (HR70.1) form can be used to define additional parameters. You can select criteria on this form to narrow down the results displayed in your report. Additional options include: Process Level, etc.*

Steps 1-7 of 7

(Image 7, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Setup Criteria** field	R	Select the setup criteria that should be used when the query is run.		**Notes** • Selection options are: ○ Y – Yes, report should use both the HR65.5 and HR65.7 selection criteria. ○ N – No, report should use not use the criteria defined on HR65.5 of HR65.7 ○ P – use only the population selection defined on HR65.5 ○ D – use only the detail population selection defined on HR65.7 **Default is Y, and this option will be used in most cases. More advanced users may select P or D.**
2	**Display Order** field	R	Select the order you want the results to display.		**Notes** • Options are ○ (P) – Print Order (as defined on HR65.4), ○ (N) – Numeric and ○ (A) – Alpha. **Default is P**.
3	**Detail Date** field	O	Type in a beginning and ending date range to make a search for historical information more efficient.		This feature makes your inquiry more efficient by limiting the scope of the inquiry to a specific time period rather than all historical records. A date range **should be used** if the report type was setup as History on the HR65.1.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					Advanced Topics– You should always indicate a detail date range in this form or in the HR65.8 (HR Writer Detail Criteria) for Employee history topics. Any date range entered on this form overrides criteria defined on the HR65.8. (See Advanced HR Writer Training.)
4	**As of Date** field	O	Type a date to perform your query "as of" that date.		**Notes** • When an "as of" date is provided, HRIS recreates the Employee record as it was on the specified date. • If an Employee is hired after the date, he/she will not appear on the inquiry. • In order for this feature to work, the affected fields must be logged or entered through
5	**Suppress Individual** field	O	Select whether or not HR Writer should suppress printing information for individuals for which no qualified detail information is found		**Advanced Topics** – The value entered in this field overrides the value selected in the Suppress Individual field on the HR Writer Detail Criteria Form (HR65.8). (See Advanced HR Writer Training.)
6	**Company – Emp or App** fields	Company field – R; all others - O			You can select additional criteria on this form to narrow down the results displayed in your report. Additional options include: Process Level, Department, Employee Group, etc.
7	**OK** button	R	Click **Ok** to be taken to the HR Writer Inquiry		
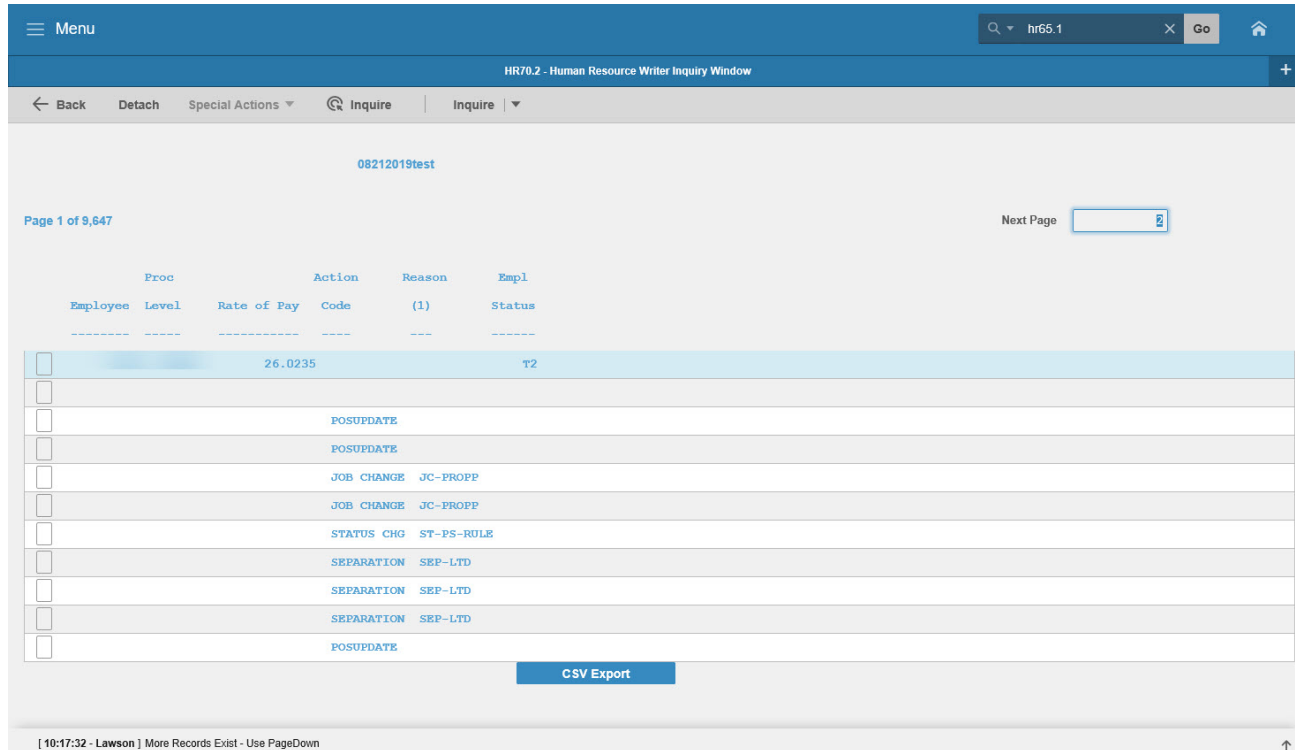
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			Window (HR70.2), which displays results.		

HR Writer Inquiry Form Results – Image
(Image 8)

Below you will see the results of a report that was created to show Employee Anniversaries along with home address:

HR Writer Report Request (HR170.1)

Form can be used to create a report on the screen, send the report to an attached printer, or export the results into a CSV file.

Notes:

- *If the results show more employees than expected, check that the Population Selection (HR65.5) and Population Criteria (HR65.6) forms.*
    - *Watch the include/exclude statement values.*
    - *Watch for Employee status codes, i.e., leaving status criteria blank will return ALL Employees, including terminated staff*
- *You can select additional criteria on this form to narrow down the results displayed in your report. Additional options include: Process Level, Department, Employee Group, etc.*
- *As with all HRIS Standard Reports, you must provide a unique Job Name and Description to run this report.*

(Image 9)

Steps 1-8 of 8
(Image 9, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Job Name/Job Description** fields		Define a unique name and description for the HR Writer report you will be running.		
2	**Author** field		Select the Author of the Report you would like to generate.		
3	**Frequency** field		Select the frequency for the report(s) you want to run.		If you want to run all the reports for that author assigned to a specific frequency on the HR65.1, you must select that frequency here. HRIS will then generate only the reports assigned

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					with the specified frequency. **Notes** Frequency options are: W = Weekly, M = Monthly, Q = Quarterly, A = Annually, O = On Demand.
4	**Title** field		Select the Title you defined for your report.		If you leave the Title field blank, HRIS generates all reports defined for the selected author. To select your report you can either type in the name of the report or select it from the drop down list. If you type in the name it must match the title entered on HR65.1 exactly or you will receive an error.
5	**Company – Line Spacing**				You can select additional criteria on this form to narrow down the results displayed in your report. Additional options include: Process Level, Department, Employee Group, etc.
6	**Suppress Individual**				Select whether or not HR Writer should suppress printing information for individuals for which no qualified detail information is found. **Advanced Topics** – The value entered in this field overrides the value selected in the Suppress Individual field on the HR Writer Detail Criteria Form (HR65.8). (See

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					Appendix C – HR Writer Title Update Form (XH64.1))
7	**Spreadsheet** field		Select YES if you want to create a CSV field when you submit the report.		**Note** – if you entered a value in the Spreadsheet field on HR65.1, the CSV field will be available in the Print Manager with that file name. If no value was entered, the spreadsheet will be under the name SPREAD2. **See** Appendix D – Creating a CSV File
8	**Add/Change** Button		If you are creating a new report, and this is the first time you have defined parameters, click **Add**. If you are changing a previous report, and you have already added the report, then click **Change**.		

After you have created your job, to view the results follow these steps on the HR170 form:

1. Click **Submit Job**
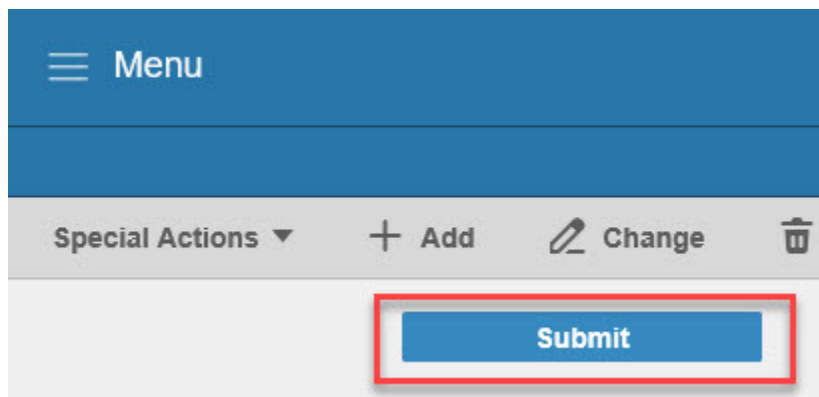
2. Click **Submit** again – receive message "Job has been submitted".

Submit Job

Job Name
TEST123

User Name

Time Zone
GMT-7

Job Queue

Start Date

Start Time

Submit | Close

3. Click the **Job Scheduler** button

HR170 - Human Resource Writer Report Request

+ Add | ✎ Change | 🗑 Delete | ◀ Previous | 🔍 Inquire | ▶ Next | Quick Submit | ⤶ Work File Distribution

Submit | Reports | **Job Sched** | Print Mgr

Job Name | TEST123
Job Description | test

4. Verify that your report has moved to the **Completed Jobs tab** and the status is Normal Completion.

5. Click the **Related Forms** drop down menu and select Job List.

6. Right click on your **report name** and select the version of the report you would like to view.

	Job Name	Description	Reports	Parameters	Status
☐	00001	00001	0	HR170	
☐	000645	000645	0	PA102	
☐	01	01	0	XP391	
☑	01218	01218	0	HR170	
	02	02	0	XP391	
	02272019	0	HR170		
	03	03	0	XP391	
	04	04	0	XP391	
	04232015	0	HR170		

Delete

Submit

Quick Submit

View Parameters

Appendix A – HR Writer Tips

- Check the standard (canned) reports first. There may be one that can be used and save time. Don't forget that a standard report may exist in another module (HR, Payroll, Benefits, Personnel Administration, Time Accrual, Time and Attendance.)

- Start by completing only the two required forms (HR Writer Title Creation (HR65.1) (Page 5) and HR Writer Format Item Selection (HR65.2) (Page 8)) and build from there.

- Build the report in pieces, testing and saving along the way. (It is easier to diagnose a problem if you can determine the point at which things go wrong and make corrections to the report.)

- When asked to create a report find out what data the requestor wants to see (Format Items), how they want to see it (Format Order), what page breaks they want (Print Order) and who they want to include (Selection). This will help complete the HRIS forms accurately. See Appendix B – Thing to Consider when Building an HR Writer Report (Page 32) for things to consider when developing an HR Writer Report.

- It is not necessary to complete all fields on all forms.

- To sort the report a certain way it is not required to list that field in the HR Writer Format Item Order (HR65.3). However, listing it allows the field to display as a visual confirmation or double check that the sort is working correctly. (List it on the far right of the results page.)

Example – a birthday list was requested, they requestor asked that the list be sorted by department name. Display Employee name and birthday in the first few fields then department as the last.

- Equate the term **POPULATION** to the words **WHICH EMPLOYEES** HR Writer Population Selection (HR65.5) defines the population variables and HR Writer Population Criteria (HR65.6) defines the matching criteria for those variables.

- Item Counting and Totaling Functions

  o When using counting or totaling functions in HR Writer, how these are setup on the HR Writer Format Item Order (HR65.3) and the HR Writer Format Item Order (HR65.4) determines how HR Writer will perform the count or total.

  o To count the number of employees or applicants included in a report, the Employee or Applicant field must be included as a data item.

    o Select C in the Print Total field on HR65.3 for the data item.

    o In the total field on HR65.4, select Y for each sort level for which you want to see counts. Select R for each sort level to get just a count of records with no detail.

  o To total a **numeric value** column in the report, select Y in the Print Total field on HR65.3 for the appropriate numeric item. In the Total field on HR65.4 for sort level(s), you have the following options:

    o Y – for column totals,

    o A – for averages,

    o R – for a count of the number of records associated with a data item with details suppressed,

    o S – for column totals with details suppressed, and

- o Z – for averages with detail suppressed.

o To summarize historical records (If Type on HR65.1 is selected as History), select R in the Print Totals field on HR65.3 for all data items beside the one to be summarized. Select Y in the total field on HR65.4.

o The following is a table illustrating the possible combinations between the HR Writer Format Item Order (HR65.3) and the HR Writer Print Order Form (HR65.4) with the subsequent results:

HR65.3 – Print Total Field	HR65.4 – Total field	Result
N	N	No Totals
Y	Y	Totals by Sort Level
Y	A	Averages of numeric values by sort level
Y	R	Count the number of records associated with an item based on sort level, detail suppressed.
Y	S	Totals only by sort level, details suppressed.
Y	Z	Averages only by sort level, details suppressed.
C	Y	Total of Count (Employee's and Applicants only).
R	S	Total per detail line with the item marked "R" repeated.

Appendix B – Things to Consider when Building an HR Writer Report

When requested to create a report ask questions to find out:
- What data the requestor wants to see (This is your Format Item Selection)
- How they want to see it (This is your Format Item Order)
- What page breaks they want (This is your Print Order)
- Who they want to include (This is your Population Selection and Population Criteria)

HR65.2	HR Writer Format Item Selection	WHAT fields should be displayed in the results? Choose fields from a pick list, in no particular order. Use HR65.3 to arrange them in the requested order. Caution – should PageDown or PageUp be needed to get to more field selections, click Change before leaving that page or the selected items will be lost.
HR65.3	HR Writer Format Item Order	How will the fields display across the page? The fields selected in HR65.2 can be reordered here.
HR65.4	HR Writer Print Order	HOW should the results be listed down the page? This is the same as a sort order. Fields selected here do not have to be listed in prior forms (HR65.2 or HR65.3.)
HR65.5	HR Writer Population Selection	WHO should be seen in the results? Select the field names here then use HR65.6 to add the values. Fields selected here do not have to be listed in prior forms (HR65.2 - HR65.4.)
HR65.6	HR Writer Population Criteria	WHO should be seen in the results? Define the criteria here for the data items selected on HR65.5. Criteria can only be defined on this form for data items selected on HR65.5. If no fields are listed, go back to the prior form (HR65.5) and select them. Click Change to save.

Appendix C – HR Writer Title Update Form (XH64.1)

In the event that a report needs to be renamed or copied, use HR Writer Title Update (XH64.1.)

Select an Author from the drop down box and Inquire. **It is critical to click Inquire in order to see the list of reports.**

Steps to Copy a Report from one Author to another Author
(Image 10)

Steps 1-7 of 7
(Image 10, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Author** field	R	Select **Your** Current Author		
2	**FC** field	R	Select the **Add** function when copying reports across authors.		FC = 'A'
3	**Title 1** field	R	Type the new title for your report		The title should be what you want to call the report.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					Example: We are creating the "DOR NEW HIRES"
4	**Author 2** field	R	Select Author to copy from		**Example**: report is being copied from author "Zelle"
5	**Title 2** field	R	Select report title to copy from Author 2 field		**Example** – Report being copied is called 'NEW HIRES'.
6	**Position To** field	O			Field is used when changing Report names. See description under Steps to rename a report within your current author.

Do not use the Position to field when copying across authors. |
| 7 | **Change** button | R | Click **Change** to process you action. | | |

Steps to Copy a Report Within the Same Author

(Image 10, same image e as above)

Steps 1-7 of 7

(Image 10, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Author** Field	R	Select Your Current Author		
2	**Position To** field	O	Select the report title from the drop down list, and click the Inquire button. The selected report will show as the first report in the list.		Feature acts as a 'Page Down' function. You can use this feature to advance to a specific report.
3	**FC** field	R	Select the **Add** function code when copying reports within the same author.		FC = 'A'
4	**Title 1** field	R	Type the new title for your report.		The title should be what you want to call the

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					report. **Example** – We want to create a new report called 'EE LIST INDIVIDUAL STIPEND'. This report will be a copy of the old report 'DOR NEW HIRES INDIVIDUAL STIPEND'
5	**Author 2** field	R	Select Your Current author.		When copying you must select an Author. **Example –** We would select author DOR HR.
6	**Title 2** field	R	Select report title to copy from Author 2 field.		**Example** – We selected report 'DOR NEW HIRES INDIVIDUAL STIPEND' to copy from Author 'DOR HR
7	**Change** button	R	Click **Change** to process you action.		

Steps to Rename a Report Within Your Current Author

(Image 10, same image as above)

Steps 1-7 of 7

(Image 10, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Author** Field	R	Select **Your** Current Author		
2	**Position To** field	O	Select the report title from the drop down list, and click the **Inquire** button. The selected report will show as the first report in the list.		Feature acts as a 'Page Down' function.\n\nYou can use this feature to advance to a specific report.
3	**FC** field	R	Select the **Change** function code when renaming reports within an author.		FC = 'C'
4	**Title 1** field	R	Select the report title you want to rename.		**Example** – Rename report title "NEW HIRES EE LIST"

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					to "DOR NEW HIRES EE LIST"
5	**Author 2** field	R	Do not use.		Field will be blank.
6	**Title 2** field	R	Type the new title for your report.		**Example** – New report title is "DOR NEW HIRES EE LIST"
7	**Change** button	R	Click **Change** to process you action.		
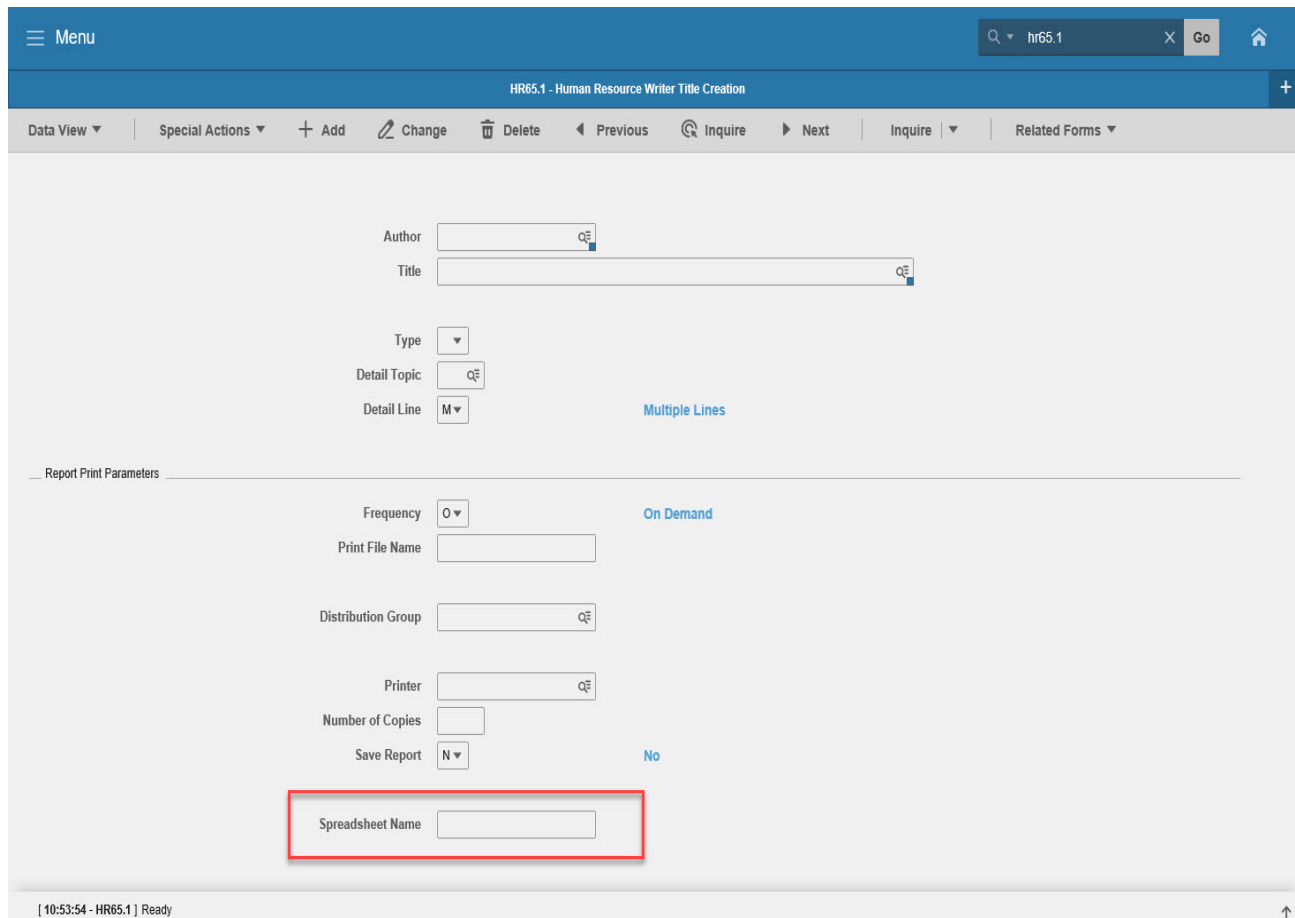
Appendix D – Creating a CSV File

HR Writer provides the ability to generate CSV (Comma-separated value) files with the results of you developed HR Writer reports. These CSV files can then be opened in applications like MS Excel, etc for manipulation.
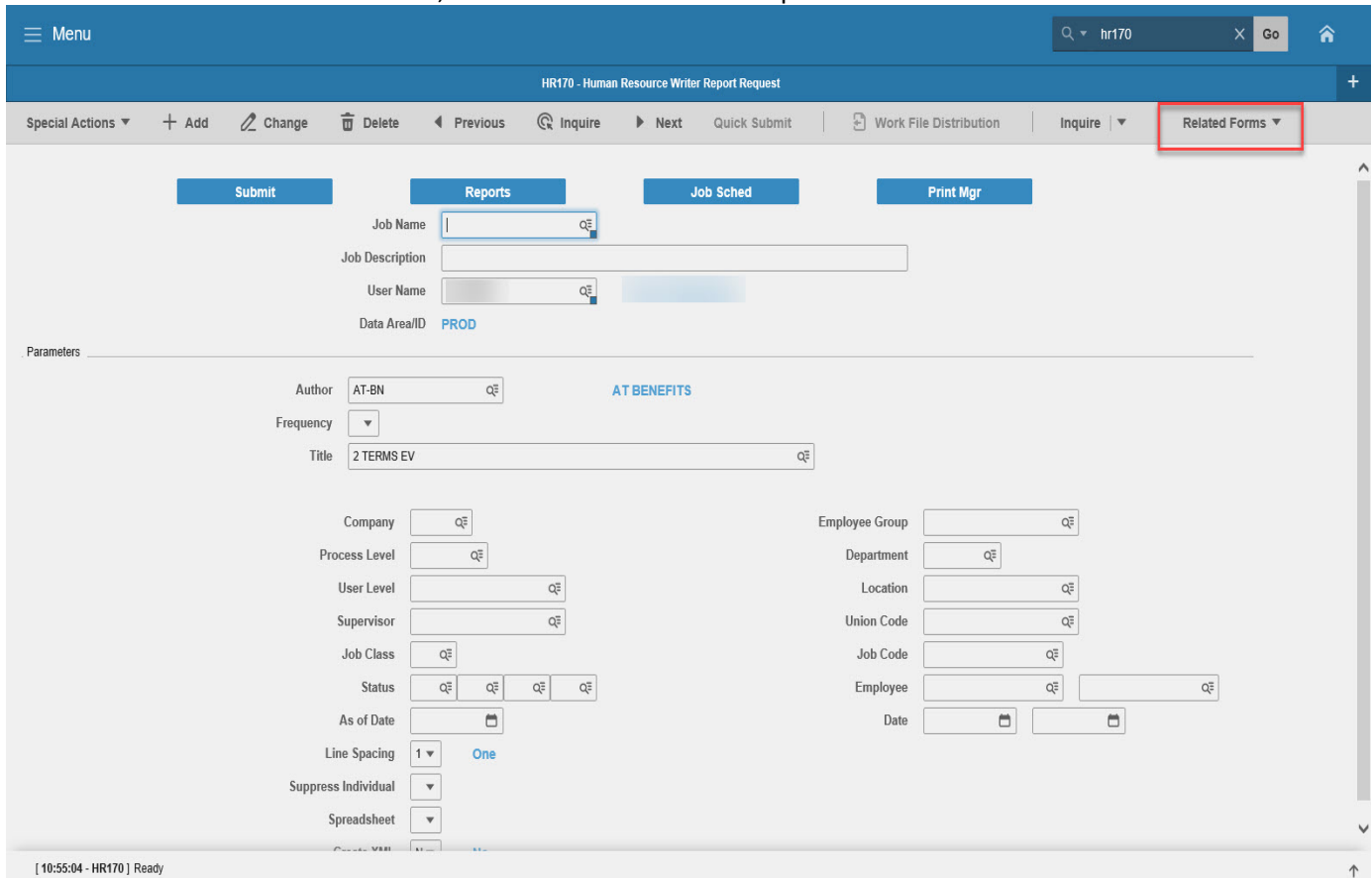
To create a CSV file from an HR Writer report, you must complete the following critical steps:

1. When defining the report on HR Writer Title Creation (HR65.1), you must include a name for you file in the Spreadsheet Name field. **This name can be a maximum of 10 characters.**

2. When setting up the HR Writer Report job on the HR Writer Request (HR170.1) you must turn on the Spreadsheet flag, **by placing a 'Y' in the Spreadsheet field**.

3. If you forget these steps the first time you run the report, you can always go back to the HR65.1 and HR170, change the information, then click the **Change** button. If both of these steps have been completed and you have submitted your HR170 job to process, then to download your CSV file, complete the following steps:

   a. From the **HR170**, Click the **Related Forms** drop down menu and select **Job List**.

b. Locate the file name you created on the HR170 (the name should appear in the **Job Name** column if the job has been processed.

c. **Click on your file**, click on **Related forms**, then click on **Print Manager** (the row should be highlighted).

d. Click on your **CSV File** (it will be under File Name and will be all uppercase)

e. Right-click on **CSV File**, click on **View**

f. Click on **Create CSV File**

g. Click **Open** – this should open the CSV file in Excel, and you can now save the CSV file as an MS Excel file.

Example of a CSV File – Report Image

	A	B	C	D	E	F	G	H	I	J	K	L
1	BNF-COMPANY	PRS-NAME	BNF-PLAN-TYPE-XLT	BNF-PLAN-CODE	PLN-DESC	PLN-START-DATE	PLN-STOP-DATE	BNF-EMPLOYEE	EMP-NAME	TERMINATED	BNF-P-NAME	BNF-PRIM-CNTG
2	1	STATE OF ARIZONA	Employee Life/AD&D	BASC	BASIC LIFE - HARTFORD	10/1/2001						Primary
3	1	STATE OF ARIZONA	Employee Life/AD&D	BASC	BASIC LIFE - HARTFORD	10/1/2001						Primary
4	1	STATE OF ARIZONA	Employee Life/AD&D	BASC	BASIC LIFE - HARTFORD	10/1/2001						Primary
5	1	STATE OF ARIZONA	Employee Life/AD&D	BASC	BASIC LIFE - HARTFORD	10/1/2001						Primary
6	1	STATE OF ARIZONA	Employee Life/AD&D	BASC	BASIC LIFE - HARTFORD	10/1/2001						Primary
7	1	STATE OF ARIZONA	Employee Life/AD&D	HELS	THE HARTFORD SUPPLEMENTAL LIFE	10/1/2009						Primary
8	1	STATE OF ARIZONA	Employee Life/AD&D	HELS	THE HARTFORD SUPPLEMENTAL LIFE	10/1/2009						Primary
9	1	STATE OF ARIZONA	Employee Life/AD&D	HELS	THE HARTFORD SUPPLEMENTAL LIFE	10/1/2009						Primary
10	1	STATE OF ARIZONA	Employee Life/AD&D	HELS	THE HARTFORD SUPPLEMENTAL LIFE	10/1/2009						Primary
11	1	STATE OF ARIZONA	Employee Life/AD&D	HELS	THE HARTFORD SUPPLEMENTAL LIFE	10/1/2009						Primary
12	1	STATE OF ARIZONA	Employee Life/AD&D	HELS	THE HARTFORD SUPPLEMENTAL LIFE	10/1/2009						Primary
13	1	STATE OF ARIZONA	Employee Life/AD&D	HELS	THE HARTFORD SUPPLEMENTAL LIFE	10/1/2009						Primary
14	1	STATE OF ARIZONA	Employee Life/AD&D	HELS	THE HARTFORD SUPPLEMENTAL LIFE	10/1/2009						Primary
15	1	STATE OF ARIZONA	Employee Life/AD&D	SLPT	SUPPLEMENTAL LIFE - STANDARD	10/1/2001	9/30/2009					Primary
16	1	STATE OF ARIZONA	Employee Life/AD&D	SLPT	SUPPLEMENTAL LIFE - STANDARD	10/1/2001	9/30/2009					Primary
17	1	STATE OF ARIZONA	Employee Life/AD&D	SLPT	SUPPLEMENTAL LIFE - STANDARD	10/1/2001	9/30/2009					Primary
18	1	STATE OF ARIZONA	Employee Life/AD&D	SLPT	SUPPLEMENTAL LIFE - STANDARD	10/1/2001	9/30/2009					Primary
19	1	STATE OF ARIZONA	Employee Life/AD&D	SLPT	SUPPLEMENTAL LIFE - STANDARD	10/1/2001	9/30/2009					Primary
20	1	STATE OF ARIZONA	Employee Life/AD&D	SLPT	SUPPLEMENTAL LIFE - STANDARD	10/1/2001	9/30/2009					Primary
21	1	STATE OF ARIZONA	Employee Life/AD&D	SLPT	SUPPLEMENTAL LIFE - STANDARD	10/1/2001	9/30/2009					Primary
22	1	STATE OF ARIZONA	Employee Life/AD&D	SLPT	SUPPLEMENTAL LIFE - STANDARD	10/1/2001	9/30/2009					Primary