ADOA

HRIS – Human Resources Information Solution

RESOURCE GUIDE: AGENCY HCM VIEW - HR WRITER ADVANCED TRAINING (FORMS: HR65.1, HR65.7, HR65.8, HR70, HR170)

AGENCY HCM VIEW - HR WRITER ADVANCED TRAINING

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Advanced HR Writer Introduction

HR Writer forms are used to create HRIS reports where none existed before. In the HRIS HR Writer Basics course you were introduced to the six forms required to create basic HR Writer reports. Those 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)
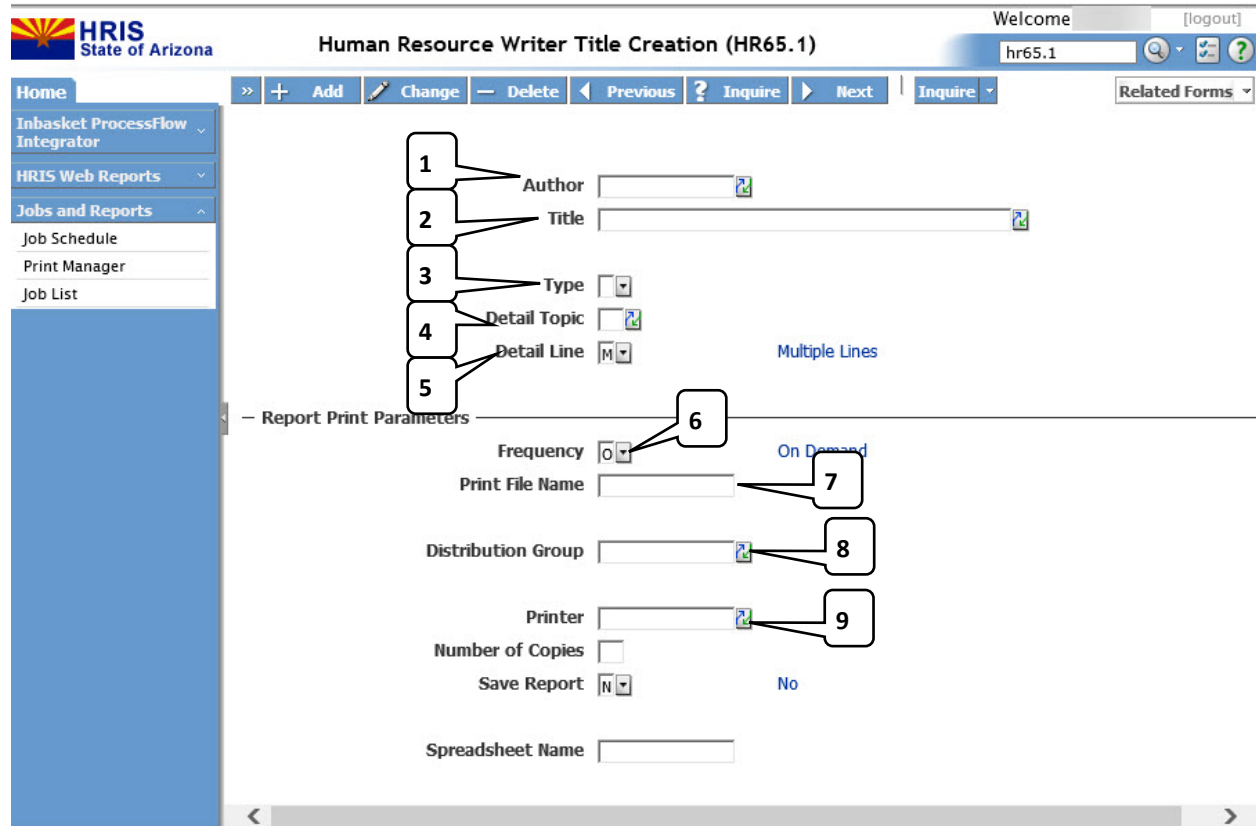- HR Writer Population Criteria (HR65.6)

HR Writer provides the ability to create more complicated reports by adding additional data items stored outside the Employee Master Record or by creating and using mathematical calculations to use in your reports.

- To add additional data items, you must select a Detail Topic and Detail Line on the HR65.1 – HR Writer Title Creation Form and use two additional forms. The two additional forms include:

  - HR Writer Detail Selection (HR65.7)
  - HR Writer Detail Criteria (HR65.8)
  - The additional data items allow you to access Employee information stored in tables outside the Employee Master Record.

- To add a mathematical equation (compute statement) to report results, you must create the equation, and then add it as part of your report results. These compute statements provide the ability to perform calculations on Employee information and add those results to reports and inquiries. The additional form used to create compute statements is:

  - HR Writer Compute Statement (HR67.1)

HR Writer Title Creation (HR65.1)

This form is required to create an HR Writer Report. For advanced HR Writer Reports, you must select a Type, Detail Topic and Detail Line on the on the HR65.1.

(Image 1)

Steps 1-9 of 13

(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.		**Notes** Authors are used to group report titles together. All reports within a specific author can be run at the same time if desired. **Example** – If all HR reports are grouped under one author. That author can then submit report criteria and run all HR reports together.

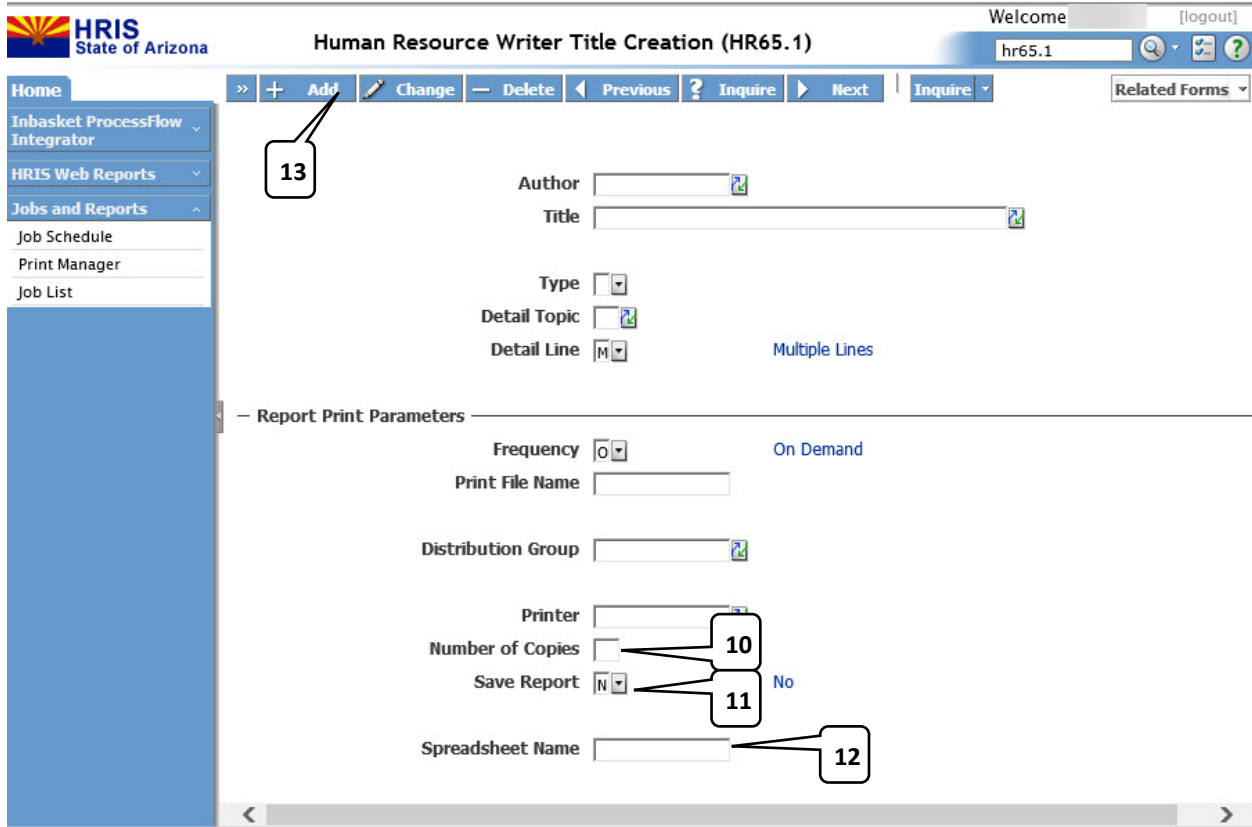| No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					Authors will be setup with a two-digit agency code, followed by 6 functional areas (HR, PR, BN, BUD, GL and MGT). You should create your report in the author for your agency and the functional 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. 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. **Notes** Depending on the Type of

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					report selected in the Type field, different detail topics will be available for selection. You must select a report type when you create an HR Writer Report. The available report types are: (E) – Employee – this options yields 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. **Example** - Additional information available from the Detail Topics include: For Type Employee - Time Accrual Plans, Dependents, etc. For Type History – Attendance History, Payment Deductions, Salary History. See **Appendix A – Available Detail Topics**

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					(Page 22) for a full list of Detail Topics
4	**Detail Topic** field	R	Select a detail topic to include in your report results.		Depending on the Type of report selected, different detail topics will be available. The detail topic selected determines:
					The data items available for selection,
					The valid compute statements (if any exist), and
					The detail selection criteria to use.
					Example – HR requests a list of all terminated Employees that have Individual Stipends on their record. This request would require a detail topic (see screen shot above).
					Selections on the HR65.1 would be:
					Type = History, Detail Topic = Payment Wages, and Detail Line = Multiple Lines.
					History is selected as type because stipends are not added to the record until payroll process. Payment Wages is selected as the detail topic because the payment history is stored in this table and multiple lines is selected because we want a listing of Employee names.
5	**Detail Line** field	R			If your report includes a detail topic, identify whether multiple detail lines should appear in

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					your results for each Employee or Applicant, or a summary line of numeric information only. **Choices are S or M**. **If left blank HRIS defaults to M.** **Notes** **S – Summarized Line** – if selected only numeric non-date fields associated with the detail topic will be available for selection on the HR65.2 (next form). This option is best if you need a total for a specific set of records, for example, a total of all payments for a single quarter. **M – Multiple Lines** – if selected, all numeric, alpha and date fields will be available for selection on the HR65.2. You can still total (summarize) the numeric, non-date fields by defining total options on the HR65.3 and HR65.4
6	**Frequency**				See HR Writer for information on these fields.
7	**Print to File Name**				See HR Writer Basics for information on these fields.
8	**Distribution Group**				See HR Writer Basics for information on these fields.
9	**Printer**				See HR Writer Basics for information on these fields.

HR Writer Title Creation (HR65.1)

(Image 1)

Step 10-13 of 13

(Image 1, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	**Number of Copies**				
11	**Save Report**				
12	**Spreadsheet** Name				
13	**Add** button	R	Click **Add** to save and be automatically taken to the next form.		

HR Writer Process Review

After the HR Writer Title Creation Form (HR65.1) has been added (including the detail topic and detail line), you will continue to follow the HR Writer Process as shown in the Advanced Flowchart (Page 7).

The forms will be completed in the following order:

HR Writer Format Item Selection (HR65.2)* – Required HR Writer Format Item Order (HR65.3)* – Optional

HR Writer Print Order (HR65.4)* – Optional

HR Writer Population Selection (HR65.5)* – Optional HR Writer Population Criteria (HR65.6)* – Optional

* Refer to the HR Writer Basics Manual for specific instructions on these forms

After you have completed the forms above, you will continue with the process by completing the additional 'advanced' forms.

HR Writer Detail Selection (HR65.7)

HR Writer Detail Criteria (HR65.8)

These two forms allow you to create population selection criteria based on your detail topic table.

HR Writer Detail Selection (HR65.7)

The detail population selection process is identical to the population selection process followed on the HR65.5 and HR65.6. The only differences are the form numbers and the data items you will be using.

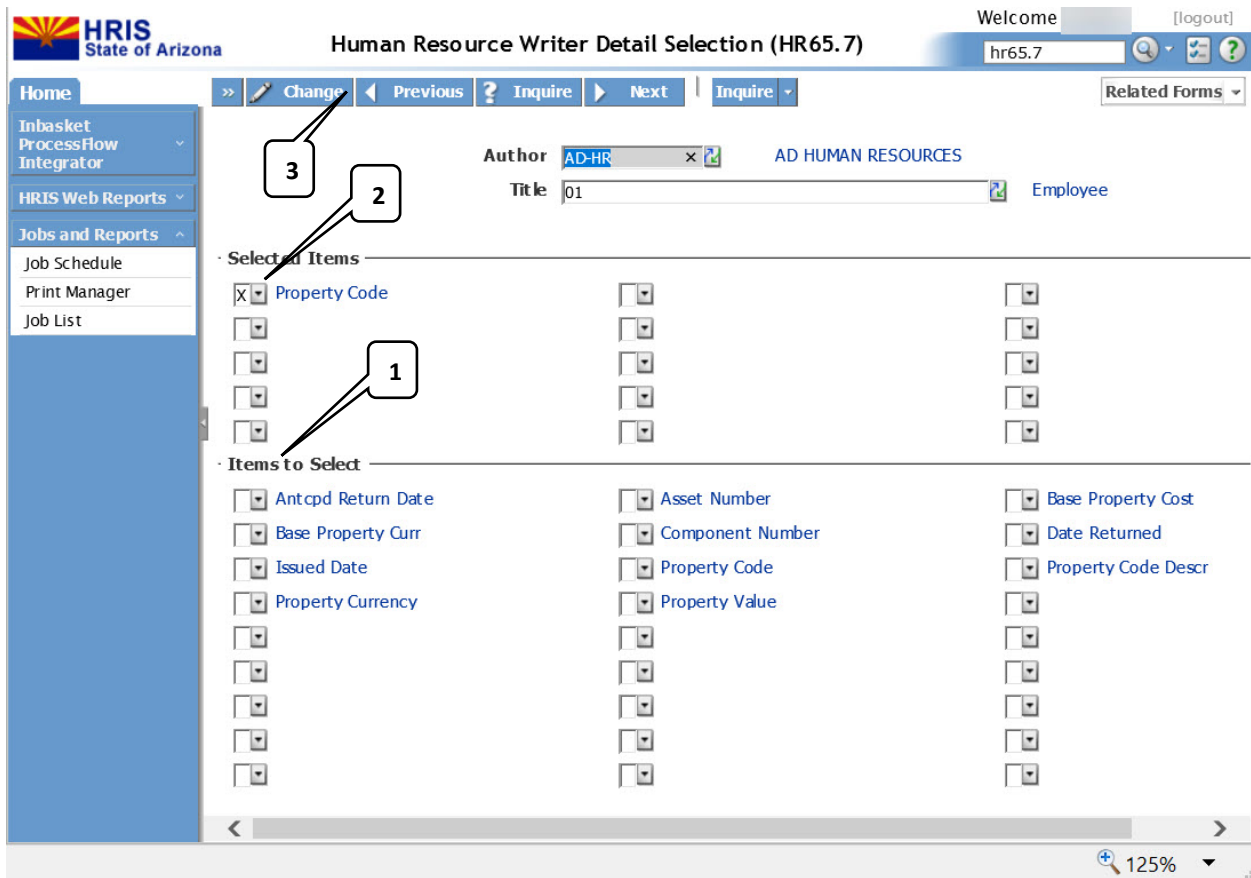The process to complete these two forms is a follows:

1. Use the HR Writer Detail Selection (HR65.7) to select the data items you want to specify criteria on.
2. Use the HR Writer Detail Criteria Form (HR65.8) to define the criteria (rules) for the population.

Employees satisfying the criteria will be included in the report results.

Notes:

- *Remember: Using these two forms is only a valid option if a detail topic has been selected on the HR65.1.*
- *The data items available on the HR65.7 will be based on the Detail topic selected on HR65.1.*

(Image 2)

Steps 1-3 of 3

(Image 2, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Items to Select**	R	Select the data items to use in defining your population criteria.		The data items displayed in the 'Items to Select' section will be those included in the detail topic selected on HR65.1 (in the example above we selected the Payment Wages table). If no detail topic is selected, this form will be blank. **Notes** To add an item, enter "X" () in the select box or click the drop down arrow, then "Select" from the drop down menu 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.
2	**Selected Items**	R			Includes the fields that have been selected to use when defining the selection 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 Change. The maximum number of data items that can be included in the selection criteria definition for a report is 9.
3	**Add/ Change**	R	Click **Add/ Change**		**Notes**

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	Button		to save changes		• 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 Detail Criteria (HR65.8)

This will be the next form in the two-step process.

This form is optional and will only be required if data items were selected on the HR65.7. Use this form to assign criteria (valid values) to the data items selected on HR65.7.

Notes:

Items selected on the HR Writer Detail Selection (HR65.7) (Page 12) appear on the top half of the form and automatically have a value assigned to them by HR Writer. This is the value to input in the Data Item fields.

(Image 3)

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

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Date** field	O	Type the beginning date of a date range.		To select material that is date sensitive, you must type the beginning date of a date range. For all employee history

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No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					topics, you must provide a detail date range, or add a date range as a runtime parameter on HR170 or HR70.1.
2	**Suppress Individual** field	R			Define whether the report results should suppress individuals that do not meet the report criteria. Options are: •'Y' = Yes. Selection 'Yes' in this field suppresses the printing of individuals with no qualified detail information. O If you select yes you must include at least one detail topic data item selected on the HR Writer Format Item Selection (HR65.2) as a parameter on this form. HR Writer needs this information to determine whether or not to suppress printing the individual. • 'N' = No. Selecting No prints all individuals, even those with no qualified information. • 'X' = Print only. Selecting X prints only information for individuals whom no detail is found. o Example – you might run the report with X to find employees who did not have Bus Card deductions taken in the prior pay period. If the field is not defined on this form, you can also select the Suppress Individual option on the HR70.1 or HR170.
3	**FC** field	R			Select whether you want to: A – Add, C – Change or

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					D – Delete a population criteria.
4	**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 for.
5	**Inc Exc** field	R			Select whether the individuals meeting the selection criteria are (I) – included or (E) – excluded. Example – To specify that you only want Employees that have pay codes in a certain range, you would enter the following (from example above): • FC = A • Data Item = 1 • Inc/Exc = I (to include) • Beginning Value = 701, Ending Value = 705
6	**Beginning Value** field	R	Define the beginning value (if applicable) that you want the data item criteria to include/exclude		Tip – You can use a wild card (*) to select the records for the data item on alpha fields (not date or numeric). When using the wild card, leave the ending value field blank. Wild card is setup as follows 'AN*', this would return all the values that begin with AN. Example – To include all Employees that had a specific pay code in their payment history, type 701 in the Beginning value.
7	**Ending Value** field	O	Define the ending value (if applicable) that you want the data item criteria to		**Example** – To stop the list at a certain pay code, type the pay code 705 in Ending value.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			include.		
8	**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. The Item Group works the same as the field on the HR65.6. See HR Writer Basics Manual – HR Writer Population Criteria (HR65.6) (Page 18) for additional information on this field.
9	**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.

HR Writer Process Review

The HR Writer Detail Criteria (HR65.8) Form (Page 14) is the last step in creating an ad hoc report.

Once this step is complete you will continue with the HR Writer Process as shown in the Advanced Flowchart (Page 7).

Your last step will be to display your results. You will display your results using one of the following:

HR Writer Report (HR170)*

HR Writer Inquiry Form (HR70.1.)*

* Refer to the HR Writer Basics Manual for specific instructions on these forms

HR Writer Compute Statements (HR67.1)

HR Writer provides the ability to add mathematical equations (compute statements) to report results. These compute statements provide the ability to perform calculations on Employee information and add those results to reports and inquiries. A compute statement can have up to three factors and two operators.
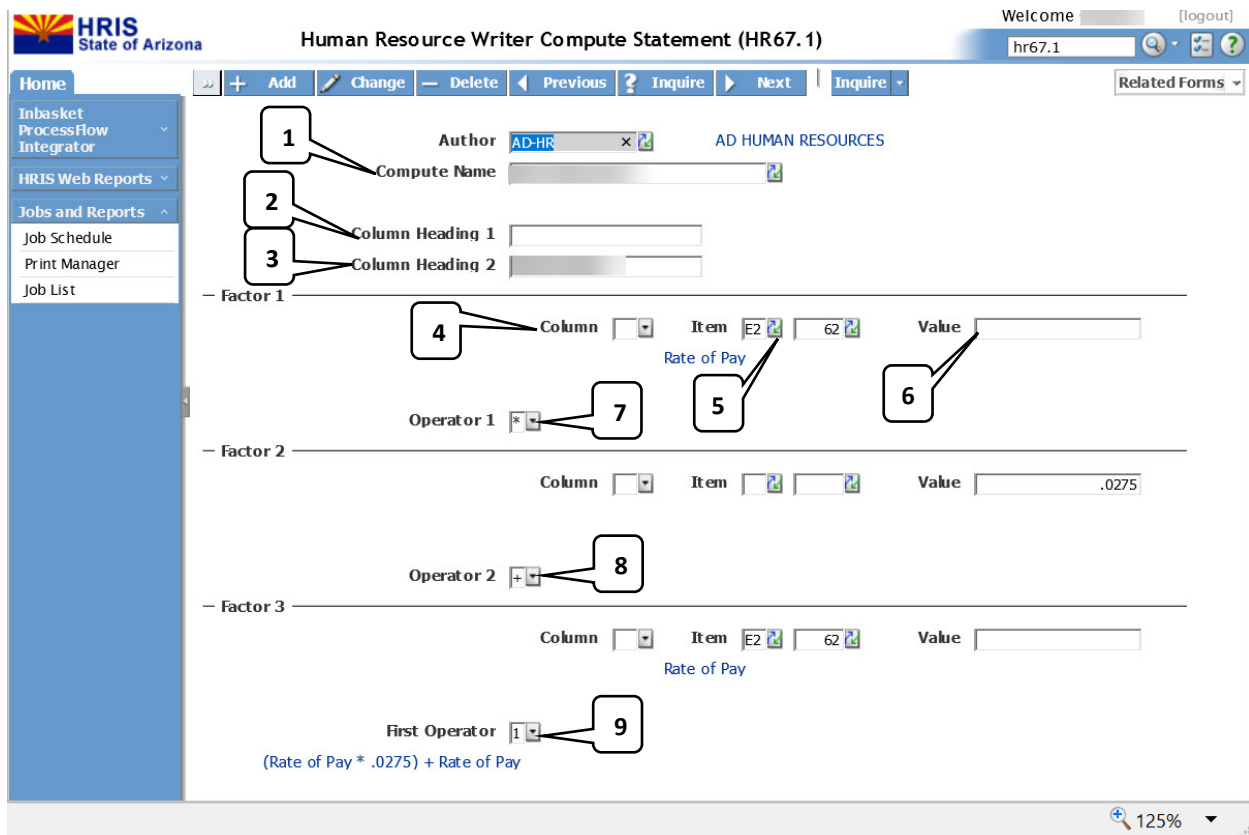
- Factor – a factor is a column in the report, a particular item from a system- defined list, or a fixed numeric value.

- Operators are (+) – add, (-) – subtract, (*) – multiple, and (/) divide.

Compute statements are associated with HR Writer Authors, so once defined; they can be used in multiple reports for the same author.

Compute statements must be created on HR67.1 before they can be added to a report.

- **Example** - The Agency Director requests a report to see the new annual salary for each Employee after a 600 General Salary Adjustment. A compute statement can be developed to take the hourly Rate of Pay from HR11, add in the $600-salary adjustment, and multiply it by the annual hours (2080). This new salary can then be displayed in an HR Writer report. (See below)
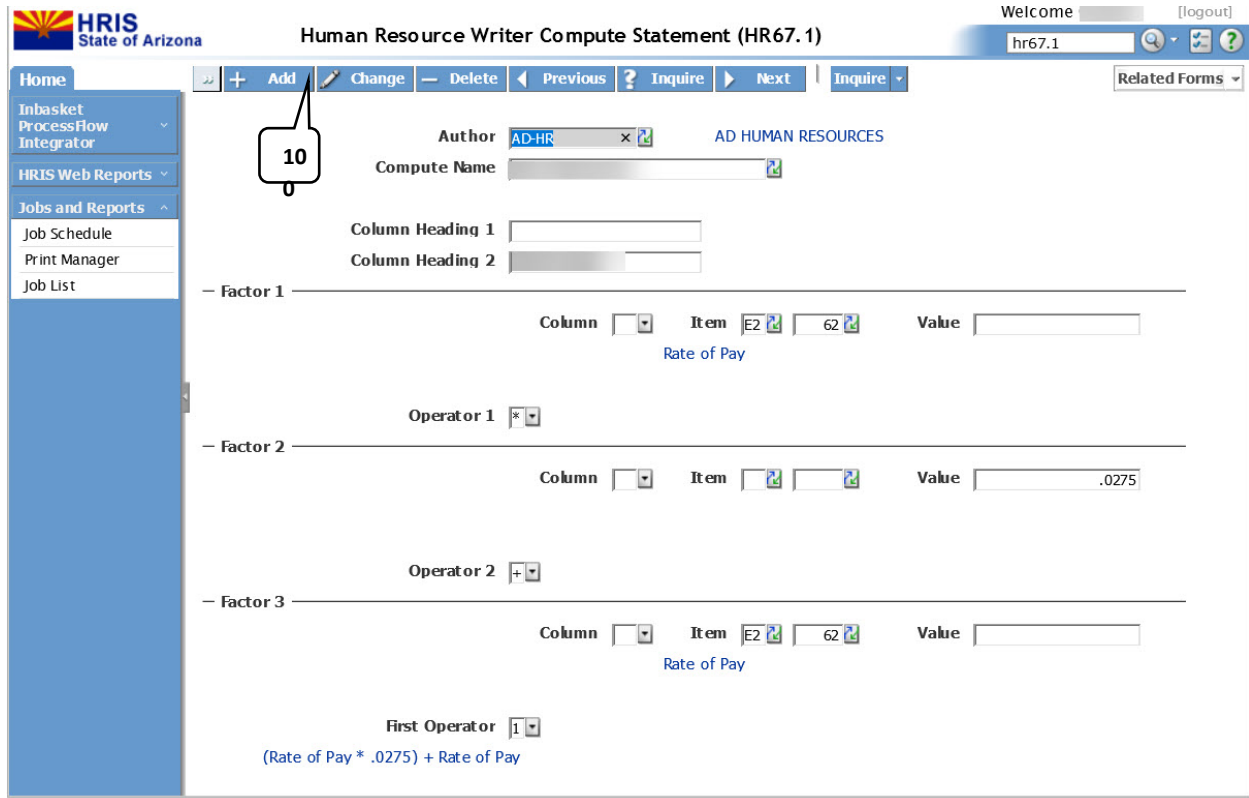
(Image 4)

Steps 1-9 of 10

(Image 1, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Compute Name** field	R			Defines the name of the new compute calculation. What you define in this field will be what is selected on the HR65.2 if the compute statement is added to your report.
2	**Column Heading 1** field	O			Defines the column heading that will appear in the report results for the compute statement.
3	**Column Heading 2** field	R			Define a second column heading to appear on the report.
4	**Column** field	O			Each Factor of the compute statement can be a report column number, a data item number, or a constant value. If a report column number is input, this indicates to HR Writer that the value appearing in that column of the report (defined on HR65.2) should be used in the computation.
5	**Item** field	O			Provides a list of different options that can be incorporated into the compute statement. When you select the item, the topic and application- assigned number of the data item appear in the fields. If selected, the item will be used in the computation
6	**Value** field	O			If a numeric value is typed into this field, HR Writer treats the value as a constant in the compute statement.
7	**Operator 1**	O			Defines the operator you

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	Field				want the calculation to use on Factor 1 and Factor 2.
8	**Operator 2** field	O			Defines the operator you want the calculation to use on Factor 2 and Factor 3.
9	**First Operator** field	O			Defines which operator to complete first if the compute statement includes two operators. Example – if your compute statement is Rate of Pay times Annual Hours plus 600.00, your first operator is a * and your second is a +. The rate of pay is 10.00 and annual hours are 2080. • If the first operator is defined as 1 (operator 1), then the formula is defined as (Rate of Pay * Annual Hours) + 600.00. (10 * 2080) + 600 = 21400. • If the first operator is defined as 2 (operator 2), then the formula is defined as Rate of Pay * (Annual Hours + 600.00). 10 * (2080 + 600) = 26800. As you can see, this is a critical field because it can significantly change the results of your compute statement.

HR Writer Compute Statements (HR67.1)

(Image 4)

Step 10 of 10

(Image 4, Table 2)

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

HR Writer Format Item Selection (HR65.2)

(Image 4

After you have created a compute statement, you can add the statement to any HR Writer Report within the selected Author.

To add a compute statement to your report, go to the HR Writer Format Item Selection Form (HR65.2); select Topic – Compute Statements, and Inquire.

The compute statements available for the specified author will be displayed in the 'Items to Select' section of the form. Follow the steps outlined for HR65.2 to add the statement to your report results.

If selected, a compute statement will be the last column displayed on your report. To change the column order, follow the steps outlined in HR Writer Basics for the HR Writer Format Item Order Form (HR65.3).

(Image 5)

| Close | Search | Find Next | Reset | Printable View |

TOPIC

Topic	Topic Desc
CM	Compute Statements
E1	Employee Master
E2	Pay Distribution
E3	Tax Information
E4	Work Information
E5	Personal Information
E6	Work Eligibility Information
E7	Benefits Information
E8	Address
EG	Grant Management
EM	Employee Miscellaneous
GE	General Employee
JC	Job Code
UF	User Fields

View 200 ▾ Records   Previous 200   Next 200   Records 1 - 14

Review – 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.

See the HR Writer Basics Manual for instructions on using the HR70.1 and HR170 forms.

Appendix A – Available Detail Topics

Depending on the report type you define, you can also select a second dimension detail topic. This detail topic determines what information (data) will be available in your report. The following table provides a list of the different report types and detail topics available.

Employee Report Type Detail Topics	History Report Type Detail Topics	Applicant Report Type Detail Topics
AC – Additional Contacts AD – Direct Deposit AR – Alternate Pay Rates AU – Automobile BN – Benefits CE – Certification CN – Contracts CP – Company Property DB – Dependent Benefits DM – Deduction Master DP – Dependents EC – Emergency Contact ED – Education EP – Employee Positions IV – Interviews JH – Prior Work History LP – Absence Plan Employee Master MD – Medical MI – Military OS – Health, Safety Incident RC – Requisition Costs RH – Requisition History RL – Relocation RO – Requisition Offers RQ – Job Requisitions RV – Reviews SK – Competencies TA – Time Accrual TG – Tax Groups TV – Travel Work State Reporting Info	AH – Attendance History AP – Direct Deposit Payments CH – Compensation History CO – DC/DB Accounts DC – Defined Contributions DH – Monthly Deduction History FR – Flex Credits Remaining FX – Flex Credits GL – Payroll GL Distributions HI – Employee History LP – Absence Plan Employee Master LV – Employee Leave of Absence PD – Payment Deductions PM – Payment Master PW – Payment Wages QD – Quarterly Deductions QW – Quarterly Wages RS – Spending Account Transactions SG – Stock Option Grants SH – Salary History SX – Stock Option Exercises TD – Time Accrual Detail TS – Time Accrual Summary VE – Vesting History WK – Weeks Worked	CE – Certifications ED – Education IV – Interviews JC – Job Code JH – Job History MI – Military RC – Requisition Costs RF – References RH – Requisition History RL – Relocation RO – Requisition Offers RQ – Job Requisitions SK - Competencies