Submitting Standard Reports and Extracts – Assigned Approver
Submitting Standard Reports and Extracts

Section Objectives

At the end of this section, you should be able to:

- Submit standard reports
- Review concurrent manager for requests
- Save reports for viewing online
- View diagnostics, request logs, and reports online
- Copy output and transfer to your PC
- Cancel running requests
Submitting Standard Reports and Extracts

PRISM TRKS Standard Reports and Extracts

- Standard reports are pre-defined reports that allow you to review PRISM information

- Reports may run at any time and are submitted via the Submit Requests form

- Reports may not be executed immediately when requested. A report request is sent to a utility program called the Concurrent Manager.
  - The Concurrent Manager coordinates the processing of several requests simultaneously
  - You can do other tasks while the Concurrent Manager is processing your request

- Users have access to certain reports based on their responsibility

- The output for the PTEE810 Weekly Timecard report, PTEE811 Timecard History by Person, PTEE817 Weekly Timecard After Transfer, and PTEE601 Retro Hourly Reconciliation must be exported to Excel to print in best format
Submitting Standard Reports and Extracts

PTEE810 Weekly Timecard:

- Provides summary view of timecard entries in PRISM TRKS for a specific time collection week, Timecard Status and whether timecard was transferred into the PRISM HR/Payroll system
- Report includes RC, Department Number, Department Name, FLSA, Weekly Schedule, Supervisor Name, Employee Name, Employee Number, Hours Type (Types of work and time off such as Hours Worked, Holiday, Sick, Vacation, etc.), Hours for each day, Total for a specific week, Timecard Status, and Transfer Status
- Report output must be exported to Excel to be printed in best format
- Refer to Lab 1 – Page 8

PTEE811 Timecard History by Person:

- Provides timecard history for a specific employee
- Report includes Supervisor Name, Employee Name, Hours Type and Hours.
- Report output must be exported to Excel to be printed in best format
- Refer to Lab 2 – Page 19

PTEE817 Weekly Timecard After Transfer:

- Provides summary view of timecard entries including Comp and Overtime for a specific time collection week after information was transferred and/or entered into the PRISM HR/Payroll system including PRISM TRKS Hourly Personnel Certification Reports (PHPCRs)
- Report includes RC, Department Number, Department Name, FLSA, Weekly Schedule, Supervisor Name, Employee Name, Employee Number, Hours Type (Types of work and time off such as Hours Worked, Holiday, Sick, Vacation, etc.), Hours for each day, Total for a specific week and indicates if the timecard has not been entered or if PHPCR has been entered
- Report output must be exported to Excel to be printed in best format
- Refer to Lab 3 – Page 21
Submitting Standard Reports and Extracts

PTEE601 Retro Hourly Reconciliation:

- Information in this report is static relating to the annual salary increase period only
- Provides detailed information of accumulated hours for non-exempt staff who are due an adjustment in pay based on the annual salary increase information processed
- Report includes RC, Department Number, Department Name, Supervisor Name, Employee Name, Employee Number, Timecard Period, Element Name, Regular Hours, Compensatory Hours, Overtime Hours, Sick Accrual Payout, Vacation Accrual Payout and Payroll Name
- Report output must be exported to Excel to be printed in best format
- Refer to Lab 4 – Page 23
Submitting Standard Reports

Report Parameters

- Most print requests require you to enter parameter values so you can specify the scope of information you want to see in the output.

- Prompts in the Parameters window are specific to the request you select.

![Parameters Window](image)

Sample parameters for a Weekly Timecard report

- Some parameter fields have a List of Values available to ensure you choose a valid parameter value while other parameters are optional and require no value.

- Default values may be predefined for one or more of the parameters associated with your request.

- Default values are automatically applied to these parameters when the Parameters window is opened.
Submitting Standard Reports

Using the *Concurrent Requests* Windows

- You can use the *Concurrent Requests* windows (summary and detail) to:
  - View a list of all submitted concurrent requests
  - Check whether your request has Submit
  - Change aspects of a request’s processing options
  - Find the position of your request in the queues of available concurrent managers
  - Copy output to your PC
  - Cancel a request

- You can navigate to the *Concurrent Requests* windows using the *Navigator* window

- Different Oracle Applications use different menu paths in the *Navigator* window to access the *Concurrent Requests* windows
Lab 1: Copy Output to Another Application: Weekly Timecard Report

Copying your report allows you to transfer the report file from PRISM to your PC using Internet Explorer commands

Run the **Weekly Timecard Report** and copy output to Excel

1. Login to PRISM TRKS as SPVDXX
2. Run the Weekly Timecard Report
3. Export the output to an Excel file
Run the *Weekly Timecard Report*

1. Login as SPVDXX
2. Select the *PRISM TRKS Assigned Approver* responsibility
3. Select the *Run* link under Reports

What type of request do you want to run?

- **Single Request**
  - This allows you to submit an individual request.

- **Request Set**
  - This allows you to submit a pre-defined set of requests.

- Determine the type of request you want to run
  - Single Request
  - Click on OK button
Lab 1 Solutions: Copy Output to Another Application – Weekly Timecard Report

- Click in the Name field
- Select the Name of the report you want to run from the List of Values:
  - PTEE810 Weekly Timecard Assigned Approver
    - Note: The list of available reports depends on your responsibility
- Click OK button

- Select the Timecard Period Start Date (Required):
  - 17-JAN-2010

  - Note: Please choose a Timecard Period Start Date (must be a Sunday) any date on or after 03-JAN-2010.
- Click OK to return to the Submit Request window
Lab 1 Solutions: Copy Output to Another Application - Weekly Timecard Report

- Click the Submit button
- This automatically opens the Requests window

- Determine if your report is completed
- The most recently run report will appear at the top of the list
- Check the Phase field to see if the status is Completed
- If the report is still running, click on the Refresh Data button to refresh the screen until the Phase field says Completed
- Click on the View Output button to view the report online once it completes running
Lab 1 Solutions: Copy Output to Another Application - Weekly Timecard Report

- To view more of the report on the screen, change the font size
- Click on Tools on the Menu Bar
  - Select Copy Files
Lab 1 Solutions: Copy Output to Another Application - Weekly Timecard Report

- Internet Explorer will build a separate window showing the first page of your output

Note: If the file does not open automatically, it may be necessary to click on Internet Explorer displayed at the bottom of your screen (as shown below)
Lab 1 Solutions: Copy Output to Another Application - Weekly Timecard Report

- Select the File, Save As command from the Menu bar

- File name will default
- Enter appropriate path and add “txt” as an extension (if it does not default)
- Select Save as type (if it does not default):
  - Text File (*.txt)
- Click on the Save button
- Close the Internet Explorer output window
Lab 1 Solutions: Copy Output to Another Application - Weekly Timecard Report

- Open your PC application, such as Excel and find the File name
  Note: Make sure that you are searching for All Files, not just Excel
- Click on Open button

- The Text Import Wizard form will display
- Click on Delimited radio (round) button
- Click on Next button
Lab 1 Solutions: Copy Output to Another Application - Weekly Timecard Report

- Check the box to the left of Tab in the Delimiters area
- Click on Next button

- Click on Finish button
Lab 1 Solutions: Copy Output to Another Application - Weekly Timecard Report

- Save as Excel Workbook

- Click Save button
### Lab 1 Solutions: Copy Output to Another Application - Weekly Timecard Report

#### Weekly Timecard Report

**Period:** 17 JAN 2010 - 23 JAN 2010  
**Run Date:** 29-Jan-10

<table>
<thead>
<tr>
<th>RC</th>
<th>Department Number</th>
<th>Department Name</th>
<th>FLSA</th>
<th>Weekly Schedule</th>
<th>Supervisor Name</th>
<th>Employee Name</th>
<th>Employee Number</th>
<th>Hours Type</th>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
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<th>Row Total</th>
<th>Timecard Total</th>
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<tbody>
<tr>
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<td>PRISM TRKS Training</td>
<td>E</td>
<td>37.5</td>
<td>Student336</td>
<td>Student336</td>
<td>12310</td>
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<td>7.50</td>
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<td>37.50</td>
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<tr>
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<td>49012</td>
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<td>Employee F</td>
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<td>0.00</td>
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<td>Supervisor B</td>
<td>Employee G</td>
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<td>37.5</td>
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<td>E-Hours Worked</td>
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<table>
<thead>
<tr>
<th>Hours Type Name</th>
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</thead>
<tbody>
<tr>
<td>E-Hours Worked</td>
<td>52.20</td>
</tr>
<tr>
<td>E-Vacation</td>
<td>22.50</td>
</tr>
<tr>
<td>N-Comp Time Taken</td>
<td>5.00</td>
</tr>
<tr>
<td>N-Dock Time</td>
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</tr>
<tr>
<td>N-Hours Worked</td>
<td>66.25</td>
</tr>
</tbody>
</table>

**Example of Weekly Timecard Report in Excel**
Lab 2: Copy Output to Another Application - Timecard History by Person Report

Submit the *Timecard History by Person Report* and copy output to Excel

1. Select the *PRISM TRKS Assigned Approver* responsibility
2. Select the *Run* link under Reports
3. Click the radio button across from *Single Request* and click the *OK* button
4. Select the PTEE811 Timecard History by Person Assigned Approver in the *Submit Request* form

![Submit Request Form](image)

5. Select the following in the *Parameters* form:

![Parameters Form](image)

- Select the *Active Employee* (search for the name by using the format of Last, First, MI, Suffix) (Required):
  - StudentXX, Employee A

- Select the *Timecard Period Start Date* (Required):
  - 04-JUL-2010
  
  Note: The dates provided change based on the date the report is run. It is possible to select Timecard Period dates approximately nine weeks prior to the last timecard transfer. For example, if the last transfer date was 02-AUG-2010, then the Timecard Period Start Dates available will include all Sundays from 30-MAY-2010 to 25-JUL-2010.

- Select the *Timecard Period End Date* (Required):
  - 24-JUL-2010

- Click OK to return to the *Submit Request* window and click the *Submit* button

6. Once the *Phase* of the report has changed to Completed, export the Output to an Excel file

Note: Detailed steps with screen shots are provided in Lab 1 (Pages 11-17)
**Lab 2 Solutions: Copy Output to Another Application - Timecard History by Person Report**

<table>
<thead>
<tr>
<th>Timecard History Report</th>
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<tbody>
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<td>Report Period Start:</td>
<td>04-JUL-2010 - 10-JUL-2010</td>
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<tr>
<td>Report Period End:</td>
<td>18-JUL-2010 - 24-JUL-2010</td>
</tr>
<tr>
<td>Run Date:</td>
<td>16-Aug-10</td>
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<tr>
<td>Employee Name:</td>
<td>Student336, Employee A</td>
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<table>
<thead>
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<th>Timecard Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-JUL-2010 - 24-JUL-2010</td>
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</tr>
<tr>
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<td>7.5</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>04-JUL-2010 - 10-JUL-2010</td>
<td>E· Holiday</td>
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<td></td>
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<td>E· Hours Worked</td>
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<td>22.5</td>
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<table>
<thead>
<tr>
<th>Hours Type Totals for Period</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Hours Type Name</td>
<td>Total Hours</td>
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<tr>
<td>E· Holiday</td>
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<tr>
<td>E· Hours Worked</td>
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</tr>
</tbody>
</table>

Example of Timecard History by Person Report in Excel
Lab 3: Copy Output to Another Application – Weekly Timecard After Transfer

Submit the Weekly Timecard After Transfer and copy output to Excel

1. Select the PRISM TRKS Assigned Approver responsibility
2. Select the Run link under Reports
3. Click the radio button across from Single Request and click the OK button
4. Select the PTEE81 Weekly Timecard After Transfer in the Submit Request form

5. Select the following in the Parameters form:

- Select the Timecard Period Start Date (Required):
  - 17-JAN-2010
  
  Note: Please enter a Timecard Period Start Date (must be a Sunday) any date on or after 03-JAN-2010.

- Click OK to return to the Submit Request window and click the Submit button

6. Once the Phase of the report has changed to Completed, export the Output to an Excel file

Note: Detailed steps with screen shots are provided in Lab 1 (Pages 11-17)
### Lab 3 Solutions: Copy Output to Another Application – Weekly Timecard After Transfer

#### Example of Weekly Timecard After Transfer in Excel

<table>
<thead>
<tr>
<th>RC</th>
<th>Department Number</th>
<th>Department Name</th>
<th>FLSA Schedule</th>
<th>Weekly Supervisor</th>
<th>Employee Name</th>
<th>Employee Number</th>
<th>Assignee Approver</th>
<th>Assigned Approver</th>
<th>Timecard After Transfer</th>
</tr>
</thead>
<tbody>
<tr>
<td>87</td>
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<td>E- Hours Worked</td>
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<td>PRISM TRKS</td>
<td>E</td>
<td>37.5</td>
<td>Supervisor B</td>
<td>Student336,</td>
<td>12300</td>
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<td>Timecard Summary</td>
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<td>37.5</td>
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<td>Student336,</td>
<td>12300</td>
<td></td>
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<td>Timecard Summary</td>
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#### Hours Type Name | Total Hours
---|---
E- Hours Worked | 50.00
E- Vacation | 22.50
N- Comp Time Taken | 5.00
N- Dock Time | 1.75
N- Hours Worked | 30.75
N- Overtime Time and a Half | 75.00

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PRISM TRKS Student Guide  
12/02/2010  
Page 22  
Submitting Standard Reports and Extracts  
Assigned Approver
Lab 4: Copy Output to Another Application – Retro Hourly Reconciliation

Submit the *Retro Hourly Reconciliation* and copy output to Excel

1. Select the *PRISM TRKS Assigned Approver* responsibility
2. Select the *Run* link under Reports
3. Click the radio button across from *Single Request* and click the *OK* button
4. Select the PTEE601 Retro Hourly Reconciliation Assigned Approver in the *Submit Request* form

![Submit Request Form]

5. Since there are no Parameters, click the Submit button.
6. Once the Phase of the report has changed to Completed, export the Output to an Excel file

Note: Detailed steps with screen shots are provided in Lab 1 (Pages 11-17)
### Lab 4 Solutions: Copy Output to Another Application – Retro Hourly Reconciliation

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<th>Supervisor Name</th>
<th>Employee Name</th>
<th>Employee Number</th>
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<th>Comp Hrs</th>
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</tr>
</tbody>
</table>

Example of Retro Hourly Reconciliation in Excel
Lab 5: Cancel a Request

Cancel a submitted request while job phase is Pending or Running

1. Login to PRISM TRKS as SPVDXX
2. Run the Weekly Timecard Report
3. Cancel submitted request
Lab 5 Solutions: Cancel a Request

- Select the **PRISM TRKS Assigned Approver** responsibility

- Select the **View** link under Reports

- Accept the default request choice:
  - **All My Requests**

- Click on **Find** to open the **Requests** window
Lab 5 Solutions: Cancel a Request

- Select the job to be terminated by positioning your cursor on the appropriate line
- Click on Cancel Request
- Save the transaction