Submitting Standard Reports and Extracts – Department Administrator
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 be run at any time and are submitted via the Submit Requests form in PRISM

- 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 and access to view the output of the reports is based upon the department which the user is assigned

- The PTER211 Missing Timecard report may be viewed online or printed

- The output for the PTEE810 Weekly Timecard report, PTEE811 Timecard History by Person, PTEE812 Time Off Balances, PTEE815 Time Off History, PTEE817 Weekly Timecard After Transfer, PTEE819 NEAD Account Number Extract and PTEE601 Retro Hourly Reconciliation must be exported to Excel to print in best format
Submitting Standard Reports and Extracts

PTER211 Missing Timecard:
- Provides timecards of employees that have not been approved by the supervisor
- Report includes FLSA (Exemption status such as Exempt or Non-Exempt), Employee Name, Employee Number, Employee Phone Number, Timecard Status (Status of timecard such as Not Entered, Working, Submitted, Approved and Rejected), Supervisor Name, Phone Number, Payroll Name (Type of Pitt payroll such as Biweekly or Monthly), Timecard Start Date and Timecard End Date
- Report may be viewed online or printed
- Refer to Lab 1 – Page 8

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 2 – Page 14

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 3 – Page 25

PTEE812 Time Off Balances:
- Provides Vacation, Sick, Personal and Compensatory Time (for non-exempt employees only) balances for employees as of the date displayed on the report
- Report includes RC, Department Name, Employee Name, Employee Number, Vacation Balance, Vacation Accrual Rate, Vacation Max, Vacation Service Date, Sick Balance, Sick Accrual Rate, Next Accrual Rate, Personal Time Balance and Comp Time Balance
- Report output must be exported to Excel to be printed in best format
- Refer to Lab 4 – Page 27
Submitting Standard Reports and Extracts

PTEE815 Time Off History:
- Provides option to run either a detailed version or summary of time off history for a specific period of time (Period Start Date can be any date on or after 03-JAN-2010 and Period End Date can be any date on or after 09-JAN-2010)
- Summary includes RC Code, Department Number, Department Name, Employee Name, Employee Number, Month/Year, Accrual Type, Accrual Plan, Beginning Balance, Hours Taken, Hours Earned, Adjustment Hours, Ending Balance, Accrual Payout and Term Payout
- Refer to Lab 5 – Page 29
- Detail includes RC Code, Department Number, Department Name, Employee Name, Employee Number, Timecard Week, Accrual Type, Hours Taken per Day and Total
- Refer to Lab 6 – Page 31
- Report output for both the summary and detail must be exported to Excel to be printed in best format

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 7 – Page 33

PTEE819 NEAD Account Number Extract:
- Provides list of Non-Exempt/Exempt Account Distribution for employees
- Report includes Employee Number, Employee Name, Department Number, Department Name, Supervisor Name, Assigned Approver Name (if applicable), Payroll, FLSA Status, Element Category, Account Number, Start Date of Account Number, End Date of Account Number, and % of Account Number
- Report output must be exported to Excel to be printed in best format
- Refer to Lab 8 – Page 35
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 9 – Page 37
Submitting Standard Reports and Extracts

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

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

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 been submitted
  - 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: Submit Standard Reports - Missing Timecard Report

Submit and Print a *Missing Timecard Report*

1. Login to PRISM
2. Submit the Missing Timecard Report
Lab 1 Solutions: Submit Standard Reports - Missing Timecard Report

- Login to PRISM
- Select the *PRISM TRKS Department Administrator* responsibility
- Select the *Run* link under Reports

![Oracle E-Business Suite](image)

- Determine the type of request you want to Submit
  - *Single Request*
  - Click on *OK* button
Lab 1 Solutions: Submit Standard Reports - Missing Timecard Report

- Click in the Name field

- Select the Name of the report you want to Submit from the List of Values
  - PTER211 Missing Timecard Report Department Admin

Note: The list of available reports depends on your responsibility

- Click on OK button

- Enter the above request parameters (Required):

  Note: Field will default to “No.” If you would like to include the current week, click in the field and select “Yes” instead.

- Click OK to return to the Submit Request window
Lab 1 Solutions: Submit Standard Reports - Missing 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: Submit Standard Reports - Missing Timecard Report

#### Program Output:

<table>
<thead>
<tr>
<th>FLSA</th>
<th>Employee Name</th>
<th>Exp. No.</th>
<th>Exp. Phone</th>
<th>TC Status</th>
<th>Supervisor Name</th>
<th>Payroll</th>
<th>TC Start Date</th>
<th>TC End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>Student014, Employee C</td>
<td>131071</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>N</td>
<td>Student014, Employee F</td>
<td>135085</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>E</td>
<td>Student016, Employee C</td>
<td>131073</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>N</td>
<td>Student016, Employee F</td>
<td>135097</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>E</td>
<td>Student017, Employee C</td>
<td>131074</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>N</td>
<td>Student017, Employee F</td>
<td>135088</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>E</td>
<td>Student020, Employee C</td>
<td>131077</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>N</td>
<td>Student020, Employee F</td>
<td>135091</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>E</td>
<td>Student021, Employee C</td>
<td>131079</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>N</td>
<td>Student021, Employee F</td>
<td>135092</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>E</td>
<td>Student023, Employee C</td>
<td>131080</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>N</td>
<td>Student023, Employee F</td>
<td>135094</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
<tr>
<td>E</td>
<td>Student024, Employee C</td>
<td>131081</td>
<td></td>
<td>NOT ENTERED</td>
<td>Knight, Abbey O &amp; T</td>
<td>Monthly</td>
<td>03-JAN-2010</td>
<td>09-JAN-2010</td>
</tr>
</tbody>
</table>

- **To view more of the report on the screen, change the font size.**
- **The vertical and horizontal scroll bars will move you through a page of your report.**
- **Use the button: Go To, First, Previous, Next, and Last to move through pages within the output.**
- **If you click Last and then look in the upper left-hand corner of the window, you will see the total number of pages in the report.**
Submit Standard Reports

- Click on Tools on the Menu Bar
- Select Copy File

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)

- Click on Printer icon on the Tool Bar to print report
Lab 2: 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

Submit the Weekly Timecard Report and copy output to Excel

1. Login to PRISM
2. Submit the Weekly Timecard Report
3. Export the output to an Excel file
Submit the *Weekly Timecard Report*

- Login to PRISM
- Select the *PRISM TRKS Department Administrator* responsibility
- Select the *Run* link under Reports

![Submit a New Request](image)

**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 Submit
  - *Single Request*
  - *Click on OK button*
Lab 2 Solutions: Copy Output to Another Application – Weekly Timecard Report

- Click in the Name field
- Select the Name of the report you want to Submit from the List of Values:
  - PTEE810 Weekly Timecard Dept Admin
- Click OK button

- Select the Supervisor (search for the name by using the format of Last, First, MI, Suffix) (Required):
  - StudentXX, Supervisor B
- Select the Report Hierarchy (Required):
  - D (Direct Reports Only)
  Note: Selecting F will provide the Full Reporting Hierarchy
- 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
Lab 2 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 2 Solutions: Copy Output to Another Application - Weekly Timecard Report

- To view more of the report on the screen, change the font size.
- The vertical and horizontal scroll bars will move you through a page of your report.
- Use the button: Go To, First, Previous, Next, and Last to move through pages within the output.
- Click on Tools on the Menu Bar
  - Select Copy Files.
### Lab 2 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 2 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 2 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 2 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 2 Solutions: Copy Output to Another Application - Weekly Timecard Report

- Save as Excel Workbook

- Click Save button
### Lab 2 Solutions: Copy Output to Another Application - Weekly Timecard Report

#### Example of Weekly Timecard Report in Excel
Lab 3: 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 Department Administrator* responsibility

2. Select the *Run* link under Reports

3. Select the PTEE811 Timecard History by Person Department Admin in the *Submit Request* form

4. Select the following in the *Parameters* form:
   - 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

5. 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 2 (Pages 17-23)
**Lab 3 Solutions: Copy Output to Another Application - Timecard History by Person Report**

<table>
<thead>
<tr>
<th>Timecard Period</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>
<th>Total Timecard Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-JUL-2010 - 24-JUL-2010</td>
<td>E- Hours Worked</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>37.5</td>
</tr>
<tr>
<td></td>
<td>Status: APPROVED</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-JUL-2010 - 17-JUL-2010</td>
<td>E- Hours Worked</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>37.5</td>
</tr>
<tr>
<td></td>
<td>Status: APPROVED</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>04-JUL-2010 - 10-JUL-2010</td>
<td>E- Holiday</td>
<td>7.5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7.5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hours Type</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>E- Holiday</td>
<td>7.5</td>
</tr>
<tr>
<td>E- Hours Worked</td>
<td>105</td>
</tr>
</tbody>
</table>

Example of Timecard History by Person Report in Excel
Lab 4: Copy Output to Another Application – Time Off Balances Report

Submit the **Time Off Balances Report** and copy output to Excel

1. Select the *PRISM TRKS Department Administrator* responsibility

2. Select the *Run* link under Reports

3. Select the PTEE812 Time Off Balances Department Admin in the *Submit Request* form

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

   - Enter the *As of Date* (Required):
     - 09-AUG-2010

     Note: Please choose a date any date on or after 03-JAN-2010.

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

     Note: If an Active Employee is not selected, all employees within the department (to which you are assigned) will be provided.

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

5. 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 2 (Pages 17-23)
Lab 4 Solutions: Copy Output to Another Application - Time Off Balances Report

<table>
<thead>
<tr>
<th>RC Code</th>
<th>Department</th>
<th>Employee Name</th>
<th>Emp #</th>
<th>Supervisor</th>
<th>Vacation Balance</th>
<th>Vacation Rate</th>
<th>Vacation Max</th>
<th>Vacation Service Date</th>
<th>Sick Balance</th>
<th>Sick Rate</th>
<th>Next Accrual Date</th>
<th>Personal Time Balance</th>
<th>Comp Time Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>87</td>
<td>PRISM TRKS Training</td>
<td>Student130, Employee A</td>
<td>12310</td>
<td>Supervisor B</td>
<td>25.000</td>
<td>0.250</td>
<td>75.00</td>
<td>24-Apr-06</td>
<td>30.000</td>
<td>7.50</td>
<td>31-Aug-2010</td>
<td>15.00</td>
<td></td>
</tr>
</tbody>
</table>

Example of Time Off Balances Report in Excel
Lab 5: Copy Output to Another Application – Time Off History

Submit the *Time Off History* (Summary) and copy output to Excel

1. Select the *PRISM TRKS Department Admin* 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 PTEE815 Time Off History Department Admin in the *Submit Request* form

![Submit Request form](image)

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

   - Select *Summary or Detail* (Required):
     - Summary
   - Select the *Period Start Date* (Required):
     - 04-SEP-2011
     Note: Please enter a Period Start Date (must be a Sunday) any date on or after 03-JAN-2010.
   - Select the *Period End Date* (Required):
     - 01-OCT-2011
     Note: Please enter a Period End Date (must be a Saturday) any date on or after 09-JAN-2010.
   - Select the *Employee* (Optional):
     Note: If an employee is not selected, all employees that have taken time off during this time will be provided.
   - 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 2 (Pages 17-23)
Lab 5 Solutions: Copy Output to Another Application – Time Off History

Report Period: September 04, 2011 - October 01, 2011
Run Date: 05-Jan-2012

Any time accrued or time taken for the current month may not appear until all weeks for that month have been processed. Monthly people accrue on the last day of the month (not necessarily the last work day of the month) while biweekly people accrue on the last day of the pay period.

<table>
<thead>
<tr>
<th>RC Code</th>
<th>Dept Name</th>
<th>Dept Name</th>
<th>Employee Name</th>
<th>Employee Number</th>
<th>Month/Year</th>
<th>Accrual Type</th>
<th>Accrual Plan</th>
<th>Balance</th>
<th>Hours Taken</th>
<th>Hours Earned</th>
<th>Adjustment</th>
<th>Ending Balance</th>
<th>Accrual Payout</th>
<th>Term Payout</th>
</tr>
</thead>
<tbody>
<tr>
<td>07</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Employee A</td>
<td>12310</td>
<td>Sep-11</td>
<td>Vacation</td>
<td>Staff Vacation Accrual Hours</td>
<td>104.75</td>
<td>-22.5</td>
<td>12.5</td>
<td>0</td>
<td>94.75</td>
<td></td>
<td></td>
</tr>
<tr>
<td>07</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Employee A</td>
<td>12310</td>
<td>Sep-11</td>
<td>Sick</td>
<td>Staff Sick Accrual Hours</td>
<td>168.75</td>
<td>0</td>
<td>7.5</td>
<td>0</td>
<td>166.25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>07</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Employee A</td>
<td>12310</td>
<td>Sep-11</td>
<td>Personal Time</td>
<td>Staff Personal Accrual Hours</td>
<td>15</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>07</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Employee A</td>
<td>12310</td>
<td>Oct-11</td>
<td>Vacation</td>
<td>Staff Vacation Accrual Hours</td>
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Example of Time Off History (Summary) in Excel
Lab 6: Copy Output to Another Application – Time Off History

Submit the *Time Off History* (Detail) and copy output to Excel

1. Select the *PRISM TRKS Supervisor* 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 PTEE815 Time Off History Department Admin in the *Submit Request* form

![Submit Request Form](image)

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

- Select *Summary or Detail* (Required):
  - Detail
- Select the *Period Start Date* (Required):
  - 04-SEP-2011
  - Note: Please enter a Period Start Date (must be a Sunday) any date on or after 03-JAN-2010.
- Select the *Period End Date* (Required):
  - 01-OCT-2011
  - Note: Please enter a Period End Date (must be a Saturday) any date on or after 09-JAN-2010.
- Select the *Employee* (Optional):
  - Note: If an employee is not selected, all employees that have taken time off during this time will be provided.
- 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 2 (Pages 17-23)
Lab 6 Solutions: Copy Output to Another Application – Time Off History

Report Period: September 04, 2011 - October 01, 2011
Run Date: 06-Jan-2012

Any time accrued or time taken for the current month may not appear until all weeks for that month have been processed.
Monthly people accrue on the last day of the month (not necessarily the last work day of the month) while biweekly people accrue on the last day of the pay period.

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<th>Employee Number</th>
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<th>Mon</th>
<th>Tue</th>
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Example of Time Off History (Detail) in Excel
Lab 7: 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 Dept Administrator* 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 PTEE817 Weekly Timecard After Transfer in the *Submit Request* form

   ![Submit Request Form]

5. Select the following in the *Parameters* form:
   
   *Note: All fields in the Parameters form are required.*

   ![Parameters Form]

   - Select the *Supervisor*:
     - Student336, Supervisor B
   - Select the *Report Hierarchy* (Required):
     - D (Direct Reports Only)
     *Note: Selecting F will provide the Full Reporting Hierarchy*
   - 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 2 (Pages 17-23)*
### Lab 7 Solutions: Copy Output to Another Application – Weekly Timecard After Transfer

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

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<th>Department Name</th>
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<th>Employee Name</th>
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<th>F. Hours Worked</th>
<th>N. Hours Worked</th>
<th>N. Comp Time</th>
<th>N. Comp Time Accrued</th>
<th>N. Comp Time Taken</th>
<th>N. Dock Time</th>
<th>N. Hours Worked</th>
<th>N. Vacation</th>
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**Hours Type Name**
- E. Hours Worked
- F. Hours Worked
- N. Hours Worked
- N. Comp Time
- N. Comp Time Accrued
- N. Comp Time Taken
- N. Dock Time
- N. Hours Worked
- N. Overtime Time and a Half
- N. Time and a Half
- Total of Hours Worked

---

**Total of Hours Worked**: 66.50

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PRISM TRKS Student Guide
02/01/2012
Page 34

Submitting Standard Reports and Extracts
Department Administrator
Lab 8: Copy Output to Another Application – NEAD Account Number Extract

Submit the **NEAD Account Number Extract** and copy output to Excel

1. Select the **PRISM TRKS Dept Administrator** responsibility

2. Select the **Run** link under Reports

3. Select the PTEE819 NEAD Account Number Extract in the **Submit Request** form

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

   Note: All fields in the **Parameters** form are optional. If none are completed, the extract will provide all employees in the department that are eligible for PRISM TRKS.

   - Select the **Supervisor**:
     - Student336, Supervisor B

     Note: The remaining fields of **Employee, NEAD Acct Effective Date From** and **NEAD Acct Effective Date To** are left blank in this example. These fields can be completed as needed.

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

5. 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 2 (Pages 17-23)
### Lab 8 Solutions: Copy Output to Another Application - NEAD Account Number Extract

<table>
<thead>
<tr>
<th>Employee Number</th>
<th>Employee Name</th>
<th>Department Number</th>
<th>Department Name</th>
<th>Supervisor Name</th>
<th>Assigned Approver Name</th>
<th>Payroll</th>
<th>FLSA Status</th>
<th>Element Category</th>
<th>Account Number</th>
<th>Start Date of Account Number</th>
<th>End Date of Account Number</th>
<th>% of Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>12310</td>
<td>Student336, Employee A</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly E SP</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.5446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>12310</td>
<td>Student336, Employee A</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly E VP</td>
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<tr>
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<td>Student336, Employee F</td>
<td>49012</td>
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<td>Pitt Monthly E SP</td>
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<td></td>
<td></td>
<td>02.49012.5446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
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<td>Student336, Employee F</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly E VP</td>
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<td></td>
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<td>02.49012.5446.000000.000000 N</td>
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<td></td>
</tr>
<tr>
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<td>Student336, Supervisor B</td>
<td>Pitt Monthly N CT</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.8446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>12316</td>
<td>Student336, Employee G</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly N OT</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.5446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>12316</td>
<td>Student336, Employee G</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly N SP</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.5446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
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<td>Student336, Employee G</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly N VP</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.5446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>12320</td>
<td>Student336, Employee K</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly N CT</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.5446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>12320</td>
<td>Student336, Employee K</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly N OT</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.5446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>12320</td>
<td>Student336, Employee K</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly N SP</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.5446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>12330</td>
<td>Student336, Employee U</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly E SP</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.8446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>12330</td>
<td>Student336, Employee U</td>
<td>49012</td>
<td>PRISM TRKS Training</td>
<td>Student336, Supervisor B</td>
<td>Pitt Monthly E VP</td>
<td></td>
<td></td>
<td></td>
<td>02.49012.5446.000000.000000 N</td>
<td>1-Jan-10</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>

---

Example of NEAD Account Number Extract in Excel
Lab 9: Copy Output to Another Application – Retro Hourly Reconciliation

Submit the Retro Hourly Reconciliation and copy output to Excel

1. Select the PRISM TRKS Department Administrator 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 Dept Admin in the Submit Request form
5. Select the following in the Parameters form:
   - Enter the Supervisor (Optional):
     - Student336, Supervisor B
   - Click OK to return to the Submit Request window
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 2 (Pages 17-23)
Lab 9 Solutions: Copy Output to Another Application – Retro Hourly Reconciliation

<table>
<thead>
<tr>
<th>RCT</th>
<th>Department Name</th>
<th>Department Supervisor</th>
<th>Employee Name</th>
<th>Employee Number</th>
<th>Timecard Period</th>
<th>Element Name</th>
<th>Regular Hrs</th>
<th>Comp Hrs</th>
<th>OT Hrs</th>
<th>Sick Accrual Hrs</th>
<th>Payroll Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>123</td>
<td>Student336, Employee G</td>
<td>Student336, Employee G</td>
<td>12316</td>
<td>07/04/2010 - 07/10/2010</td>
<td>Comp Time Paid</td>
<td>2.5</td>
<td>Pitt</td>
<td>Monthly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>123</td>
<td>Student336, Employee G</td>
<td>Student336, Employee G</td>
<td>12316</td>
<td>08/14/2010 - 08/20/2010</td>
<td>Comp Time Paid</td>
<td>2.5</td>
<td>Pitt</td>
<td>Monthly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>123</td>
<td>Student336, Employee G</td>
<td>Student336, Employee G</td>
<td>12316</td>
<td>08/21/2010 - 08/28/2010</td>
<td>Comp Time Paid</td>
<td>2.5</td>
<td>Pitt</td>
<td>Monthly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>123</td>
<td>Student336, Employee G</td>
<td>Student336, Employee G</td>
<td>12316</td>
<td>08/29/2010 - 09/04/2010</td>
<td>Comp Time Paid</td>
<td>2.5</td>
<td>Pitt</td>
<td>Monthly</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Example of Retro Hourly Reconciliation in Excel
Lab 10: Cancel a Request

Cancel a submitted request while job phase is Pending or Running

1. Login to PRISM
2. Submit the Timecard History Report
3. Cancel submitted request
Lab 10 Solutions: Cancel a Request

- Login to PRISM
- Select the PRISM TRKS Department Administrator responsibility
- Select the View link under Reports

- Accept the default request choice:
  - All My Requests
- Click on Find to open the Requests window
Lab 10 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