Retrieve Employee Data for the Merit Process

Important Information

- Use this procedure to retrieve employee data from the UM Data Warehouse. You can use this data as both a tool for Merit analysis and as the basis for preparing a Merit file using the Merit spreadsheet template.

- This procedure only demonstrates retrieving the pre-defined report for regular employees; however, you can follow it to retrieve the report for temporary employees as well.

- This procedure is divided into two sections:
  1. **Retrieve and Run a Merit Pre-Defined Report** – explains how to retrieve a Merit pre-defined report from the Corporate Documents area of the repository and run it using BusinessObjects
  2. **Import Merit Data into Excel** – explains how to import the data retrieved using BusinessObjects into an Excel spreadsheet

- For an explanation of the selection criteria the system uses prior to running the Merit pre-defined queries, refer to the **Selection Criteria for Merit Pre-Defined Reports** Reference Document.

Retrieve and Run a Merit Pre-Defined Report

Navigation

Log in to Citrix and BusinessObjects, then run a status query to confirm that you are successfully logged in. If you are unsure how to do this, see Module 1 of the **Data Warehouse: Understanding Human Resource Data** (HR004) training guide for information.

BusinessObjects New Report Wizard - Welcome

1. After you log in to Citrix and Business Objects, the New Report Wizard may appear. If it does, click **Cancel**.
BusinessObjects Main Window

2. From the File menu, select Retrieve From, then Corporate Documents.

Retrieve Dialog Box

Notes:
- To resize columns in this dialog box, place your cursor on the column header border and drag left or right to shrink or expand the column.
- To view the entire Name column, place your cursor between the Name and Categories columns. When directional arrows display, double-click. The columns expand to show the entire name.

Retrieve Dialog Box (cont’d.)

3. Select the desired document name in the Name column, then click the Retrieve button.

Note: Merit pre-defined reports include:
- HR01 HumRes Merit Increase Regular.rep
- HR01 HumRes Merit Increase Temp.rep

4. Verify that the Open on Retrieval checkbox is turned on so that the report will open automatically.
Import Results Dialog Box

5. Click **OK** in the Import results dialog box.

BusinessObjects -- HR01 HumRes Merit Increase Regular

6. The report structure is initially displayed without data. To enter selection criteria and generate the report, click the **Refresh Data** button or select **Refresh Data** from the **Data** menu.
Job Effective Date Options Dialog Box

7. Click in the **Job Effective Sequence Options** field, then click **Values...**

8. Select **Max Sequence**.

9. Click **OK**.

10. Click in the **Person Alt Ident Hist Effective Date Options** field, then click **Values...**

11. Select **Current Row**.

12. Click **OK**.
13. At this point, you may choose to run the report based on one or more appointment department group(s) or appointment department ID(s).

A. If you want to run the report for a specified Dept Grp, enter the Dept Grp code in the Enter Appt Dept Grp field and enter an asterisk (*) in the Enter Appt DeptID field.

Notes:
- To view a list of department groups, click to display a List of Values dialog box. Select one or more values (to select more than one value, press the Ctrl key while clicking each desired value), then click OK.
- If you enter a list of Dept Grps manually, separate each with a semicolon.

B. If you want to run the report for a specified DeptID, enter the DeptID in the Enter Appt DeptID field and enter an asterisk (*) in the Enter Appt Dept Grp field.

Notes:
- To view a list of department IDs, click to display a List of Values dialog box. Select one or more values (to select more than one value, press the Ctrl key while clicking each desired value), then click OK.
- If you enter a list of Appt DeptIDs manually, separate each with a semicolon.
Job Effective Date Options Dialog Box
(Continued)

14. Type the date on which Merit will be effective (e.g., 09/01/2004) in the Enter as of date field.

Notes:
- The beginning of the bi-weekly pay period does not always correspond with the first day of the month (e.g., in 2004 the pay period in which 9/1 falls begins on 8/29). In such cases, the unit must decide whether to begin the Merit increase at the beginning of the pay period or the beginning of the month (in which case a smaller, pro-rated dollar amount would be applied to the first pay period in which the Merit increase was in effect).
- The as of date determines which effective-dated row of data the query retrieves.

15. Click OK to run the report.

Queried Data Report Screen – Data for Excel

16. Click the Data for Excel tab to view the data.

Note: The Data for Excel view must be selected when you export the data to Excel. If you do not, the export file will not correspond to the Merit spreadsheet template into which you need to copy the data.

17. Click the Report for Information and Printing tab to view the data in a report layout with headings.

Note: Use this view of the data to print the report.
18. When you are ready to save the report, before exporting the data to Excel, click the Data for Excel tab to return that view of the data.

19. From the File menu, select Save As.
20. Browse to the c:\Temp directory.

21. Type the file name in the File name field. Remember to choose a name you will recognize easily.

22. Select Text file (*.txt) from the drop-down list in the Save as type field.

23. Click Save.
24. From the **File** menu, select **Exit**.

25. Click **No**.

   **Note:** If you click **Yes**, a copy of your data is saved on the hard drive. This is not recommended because you have already saved the data in the Temp folder on your C:\ drive.

26. Select **Logoff** from the **Start** menu.
Log Off Windows Dialog Box

27. Click Yes.

Import Merit Data into Excel

Navigation

Start Microsoft Excel.

Microsoft Excel

28. From the File menu, select Open

Open Dialog Box

29. Browse to the c:\Temp directory.

Notes:

- Macintosh users should open the temp folder at the top level of their hard drive.
- You may not see the saved import file in the opened folder.

30. Select Text Files in the Files of type drop-down list. The saved import file displays.
Open Dialog Box

31. Double-click the appropriate file.

Text Import Wizard Screen, Step 1

32. Verify that the Delimited radio button is turned on in the Original data type box.

33. Click the Next button.
34. Verify that the Tab checkbox is turned on in the Delimiters group box.

35. Verify that " is listed in the Text qualifier field.

36. Click the Next button.

37. While pressing the Shift key, click the EmplID and Empl Rcd# columns to highlight them.

38. Turn on the Text radio button in the Column data format box to select text format for all highlighted columns. Doing so prevents leading zeros in the data from being excluded.

39. Click the Finish button. The data you retrieved using BusinessObjects displays as an Excel worksheet.
Queried Data Table

Note: The data in columns A-Q (EmpID--Short Code) matches the data required for the Merit spreadsheet template. The data in columns R-AG (Admin Dept Descr-Years in Title) is informational only and should not be included in the columns transferred to the template.

40. From the File menu, select Save As.

41. Type a file name that you will recognize easily in the File name field.

42. Select Microsoft Excel Workbook (*.xls) from the drop-down list in the Save as type field.

43. Click Save.

Note: You can use this file to model your merit increases. For detailed information on copying this data into the Merit spreadsheet template and modifying it for the Merit process, see the Prepare a Merit File with a Merit Spreadsheet Template step-by-step procedure.