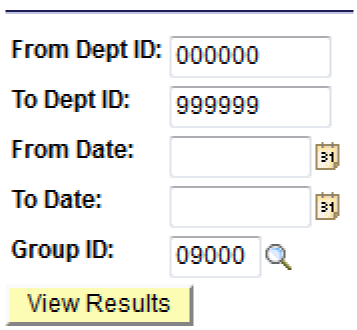
Creating Resource Reports

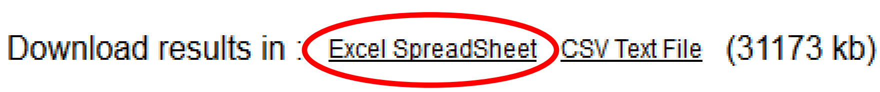
Step 1: Pull Query

1. Login to PeopleSoft HCM with your FIRST INITIAL LAST NAME login.
2. Under Reporting Tools, click **Query** and then **Query Viewer**.
3. On the Query Viewer page, click **Search**.
4. Find the query shown below and Click the **HTML** hyperlink.

5. Complete the fields as indicated. The **From Date** will be the first day of the month you are pulling for, and the **To Date** will be the last day of the month you are pulling for. Then click **View Results**.



6. Now choose to download the results in Excel.

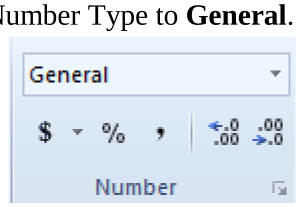


Step 2: Format and Cleanup Data (Pre Access)

1. Save this spreadsheet as **YYYY.MM** in the following location:

   PMO > PMO ADMIN > REPORTS > RESOURCE REPORTS > MONTHLY QUERIES

2. Delete the first row.
3. Insert a new column to the left of A.
4. Insert 3 new columns to the left of G - name these columns **Year**, **Day**, and **Month**. Highlight these columns and change the Number Type to **General**.



5. Enter the following formulas:
    a. Year: **=left(J2, 4)**
    b. Day: **=right(J2, 2)**
    c. Month: **=mid(J2, 5, 2)**

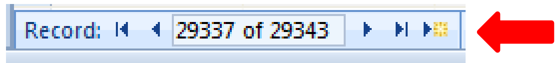
6. Now the date will be broken up into three columns. It should look like the image below.

G	H	I	J
Year	Day	Month	Date
2014	02	06	20140602

7. Click the cell displaying the year in the first row. Place your cursor over the little black box in the lower right hand corner until the cursor shows a plus sign. Double-click and it will auto fill the formula to the bottom of the data. Follow the same steps for the Day and Month Columns.
8. Move Column J to the end of the spreadsheet by highlighting the column, right-clicking and selecting **Cut**. Then move to the end of the spreadsheet (column Y), right-click and select **Insert Cut Cells**.
9. Insert a column after Location (Column T). Copy and Paste the entire Location column into the new column and name it **Location 2**.
10. Filter the Location column to show only the ISD locations (All the ISD- and Landmark).
11. Filter by TRC Leave codes. Filter by blank category codes. Change blank category field to “LEAVE”. Then take the filter off the TRC Column and the Category Column.
    - <u>TRC LEAVE CODES</u>:
        a. ANLVP
        b. CTPT
        c. CTPT1
        d. CTTSP
        e. CTX
        f. ENFLP
        g. ENFTK
        h. FLWPO
        i. FMALP
        j. FMASP
        k. FMLSP
        l. HLSPY
        m. HOLCP
        n. HOLPP
        o. JURYE
        p. LWPHS
        q. LWPSD
        r. MILVP
        s. SCKPP
        t. SCKSP

Step 3: Insert Data into Access and Run Update Queries

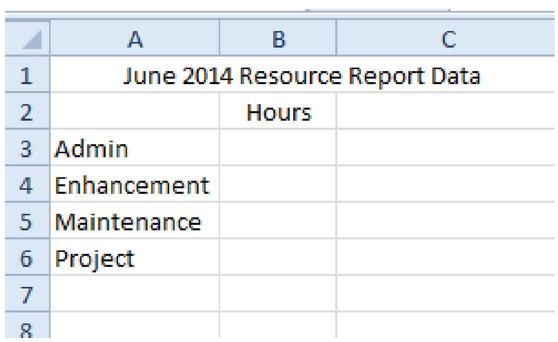
1. Have a copy of the database opened and Save As the month you are reporting.
2. Highlight the data in your spreadsheet from A2 to X2 (and then to the end of the spreadsheet). Copy this data.
3. Click the **New Record** button.



4. Paste the data in the new record.
5. Next, run all the Update Queries. At this point, you can do actuals. Follow Actual instructions.

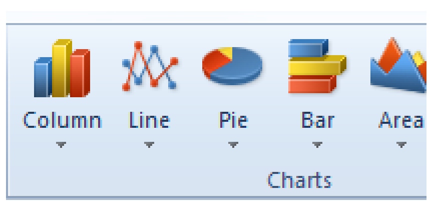
Step 4: Creating the Resource Reports

1. Open an Excel spreadsheet.
    a. Name the first tab the name of the month you are reporting for (Ex: June Report).
    b. Name the second tab "Data".
2. Set a table up in the "Data" tab to look like this:

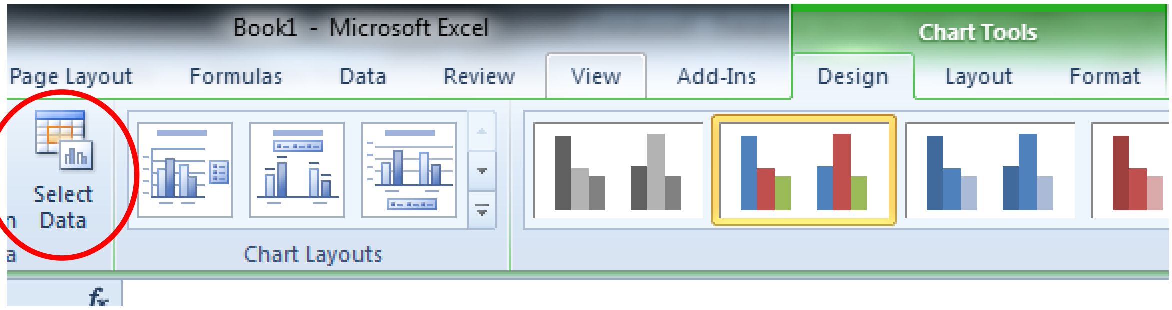


	A	B	C
1	June 2014 Resource Report Data		
2		Hours	
3	Admin		
4	Enhancement		
5	Maintenance		
6	Project		
7			
8			

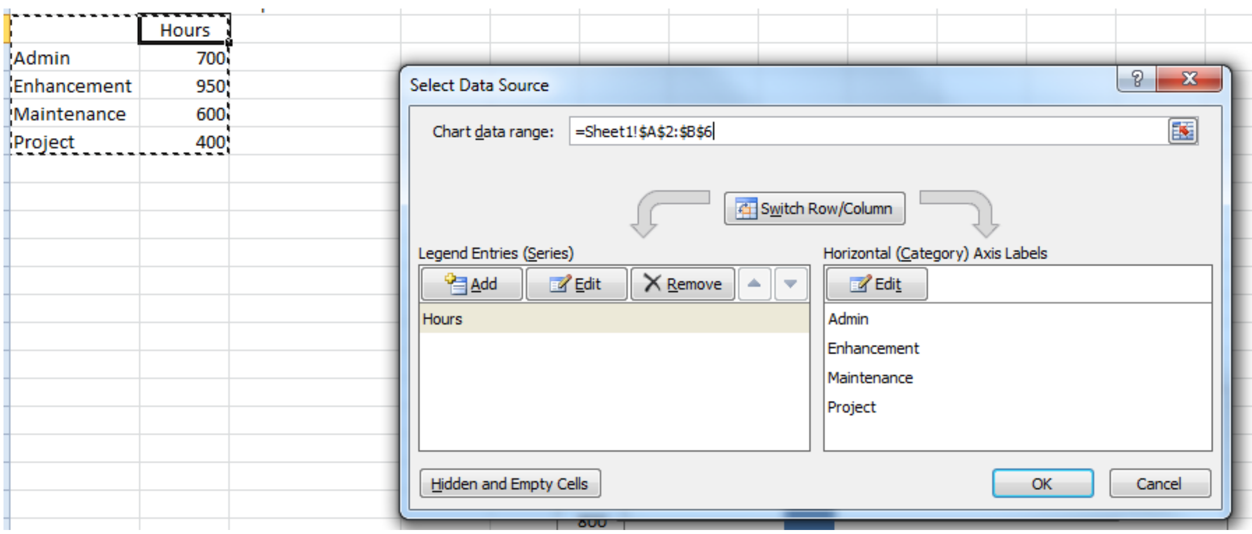
3. Determine which queries you need to run by referring to the **Query Uses** Word document. Run the appropriate Admin Time Detail Query and enter the results for Admin in the spreadsheet. Then do Enhancement Time, Maintenance Time, and Project Time the same way.
4. Create a Column Chart in the June Report tab using this data:
    a. Click the **Insert** tab. Choose **Column** first.



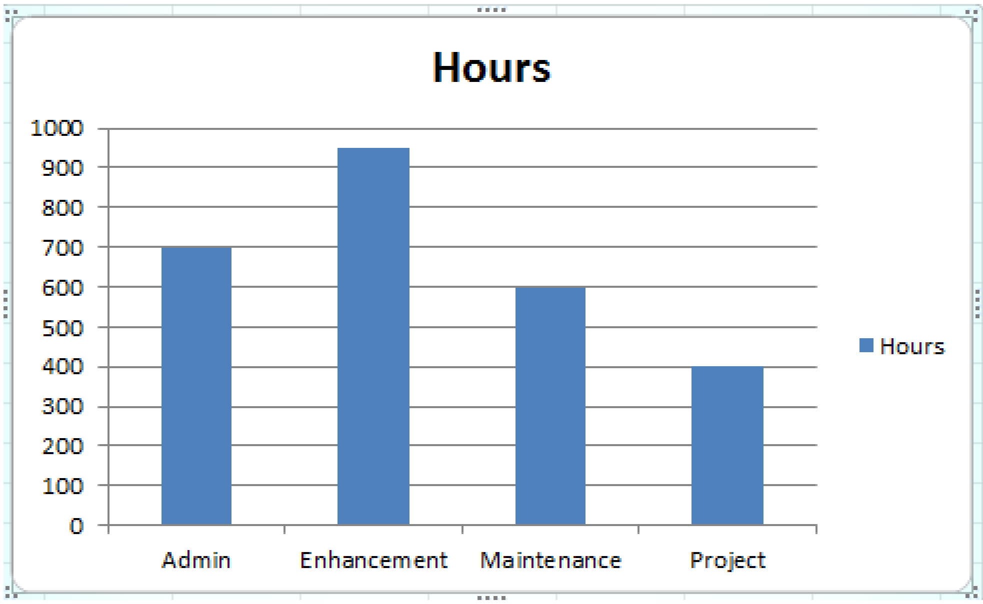
b. With the chart selected, click the **Select Data** button on the ribbon in the Design tab (Under Chart Tools).



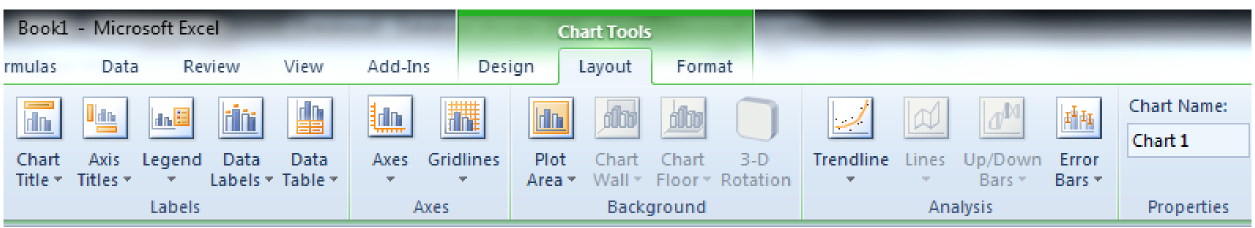
c. The Select Data Source box will appear. Click your **Data** tab and highlight the area as indicated in the picture:



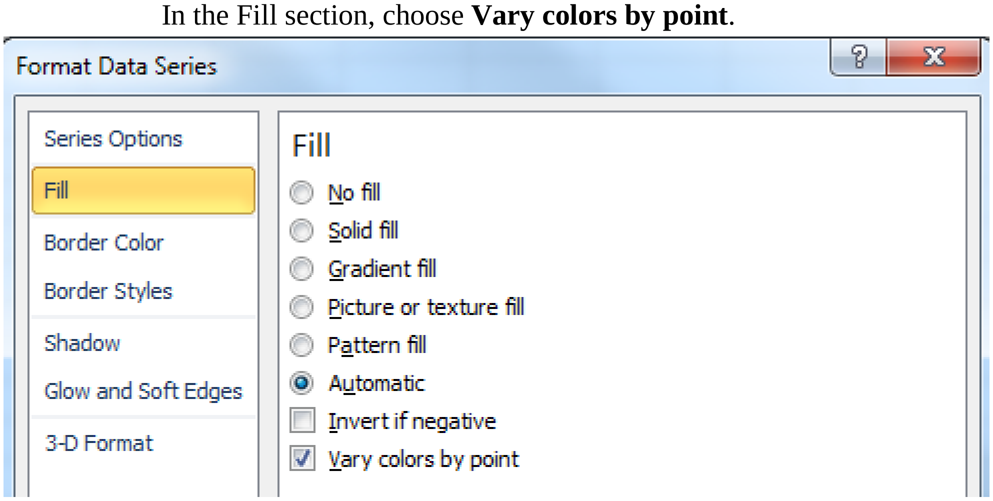
d. Once you click **OK**, you should have a chart that looks something like this:



e. Format the chart:

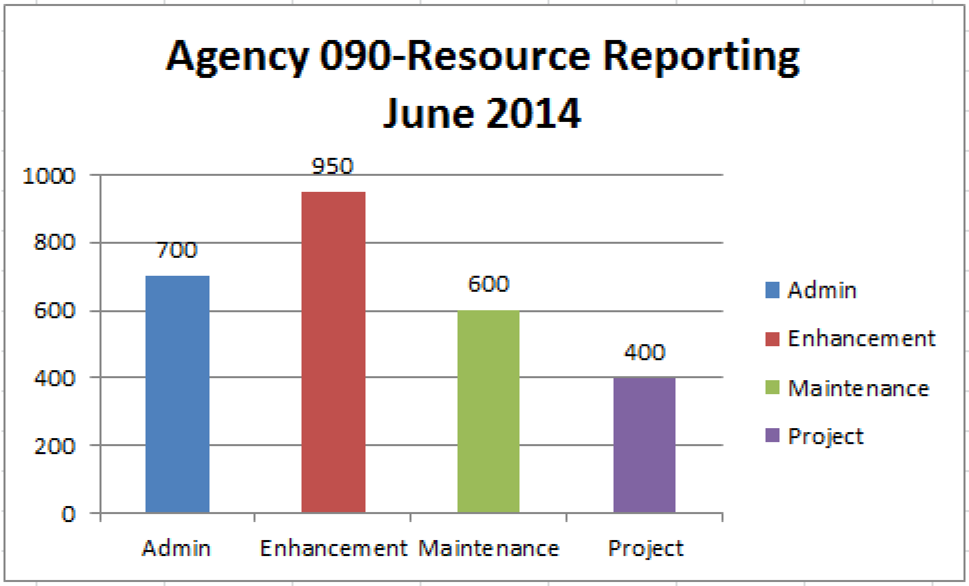


i. On the Layout tab, add a Rotated Axis title to the Primary Vertical Axis.
ii. Add Data Labels Outside End.
iii. Click one of the columns once, then right-click and choose **Format Data Series**. In the Fill section, choose **Vary colors by point**.

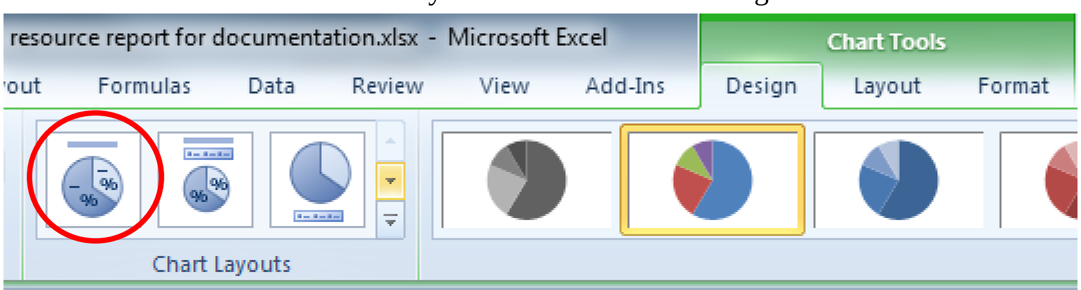


iv. Change the title by clicking the text box to Agency ###-Resource Reporting June 2014.

v. Your graph should now look like this:

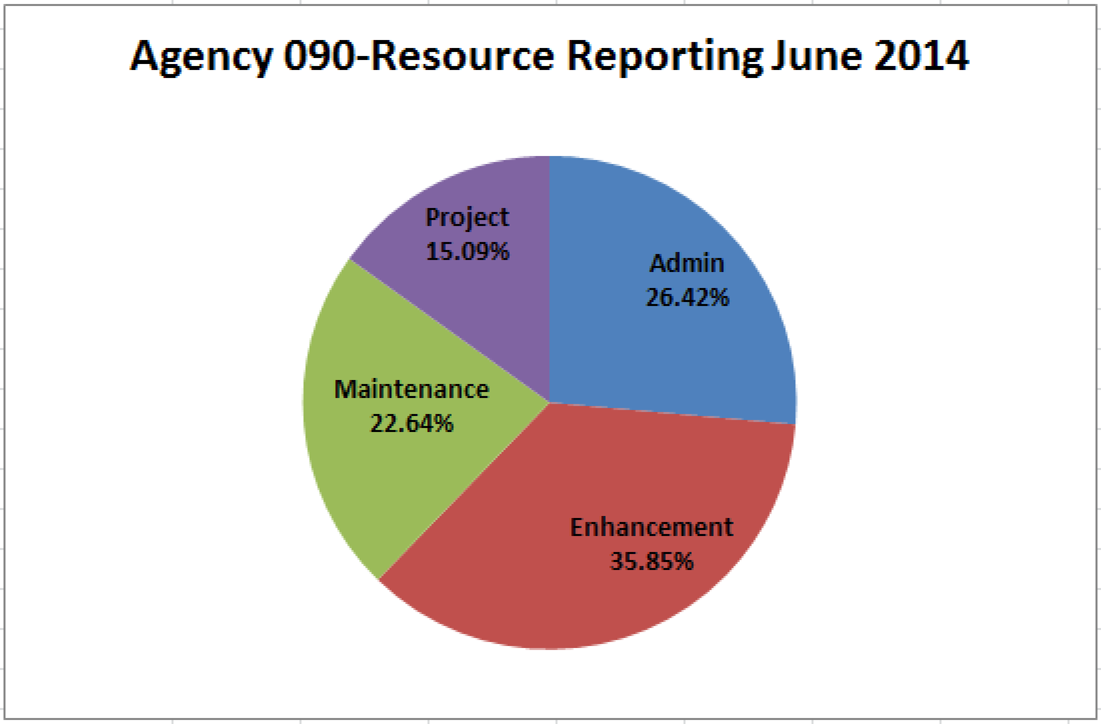


5. Create a Pie chart for the June Report tab using this data:
   a. From the Insert Menu, create a Pie Chart. Follow the same instructions for selecting data as you did previously.
   b. Format your chart:
      i. Change the Chart Layout to the first option with the percentages and no legend found in the Chart Layout Section under the Design Tab.

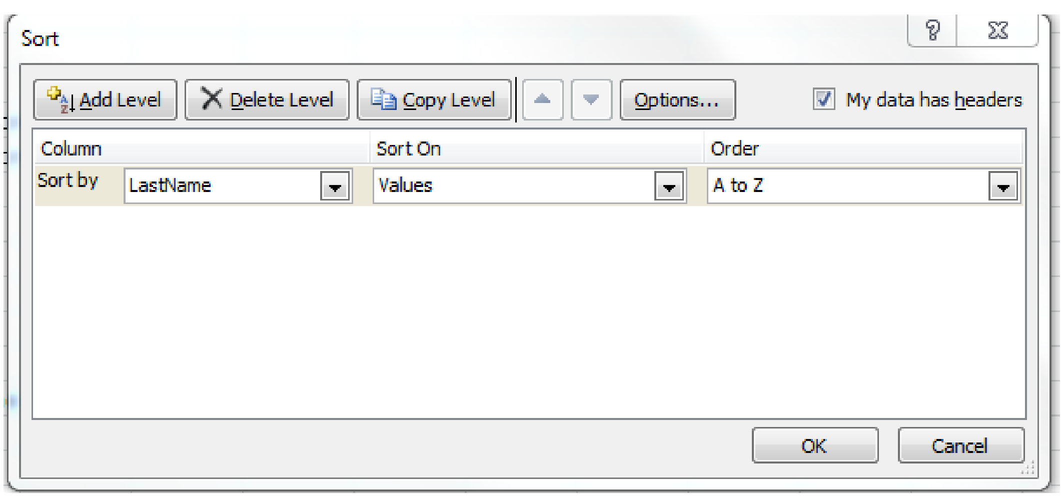


      ii. Click the text labels, and adjust the size and boldness to make them easy to read.
      iii. Select the text labels, right-click, and select **Format Data Labels**. In the Number section, change the Number Category to Percentage.
      iv. Change the Title of the Chart to Agency ###-Resource Reporting June 2014.

v. Your pie chart should now look like this:

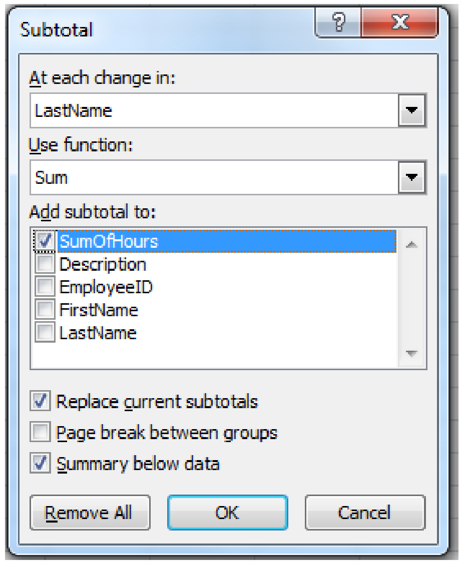


6. Now you will follow a similar process to create a Column Chart and Pie Chart for the Admin Time breakdown:
    a. First, run the appropriate Admin Time-Detail query in the database. Refer to the **Query Uses** Word document for assistance on choosing the correct query.
    b. Copy the first 5 columns (Sum of Hours, Description, Employee ID, Last Name, First Name). Paste this data twice on the Data tab of your spreadsheet with a few lines between each block of data.
    c. **1st block of detail Admin data -** Highlight this data (not including the title Admin Time-Detail) and sort by last name in alphabetical order.



i. With the data still highlighted, click the **Subtotal** button on the data tab.

ii. Fill the subtotal box out like this:



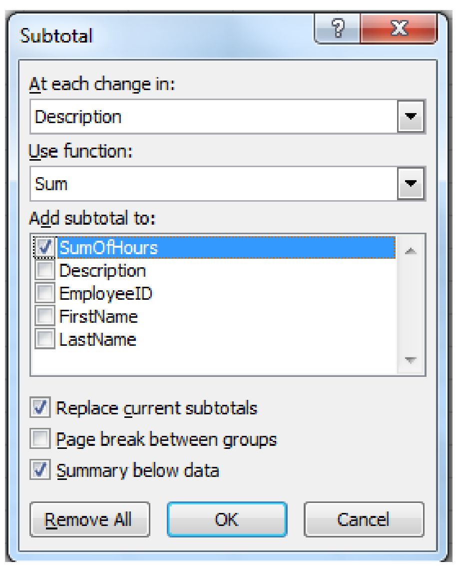
iii. Click **OK**. Then click the tab number 2.

iv. You will now see the subtotals of each employee's Admin time. If you click tab number 3, you can see the detail time information.

d. **2nd block of detail Admin data -** Highlight this data (not including the title Admin Time-Detail) and sort by description in alphabetical order.

i. With the data still highlighted, click the **Subtotal** button on the Data tab.

ii. Fill the subtotal box out like this:



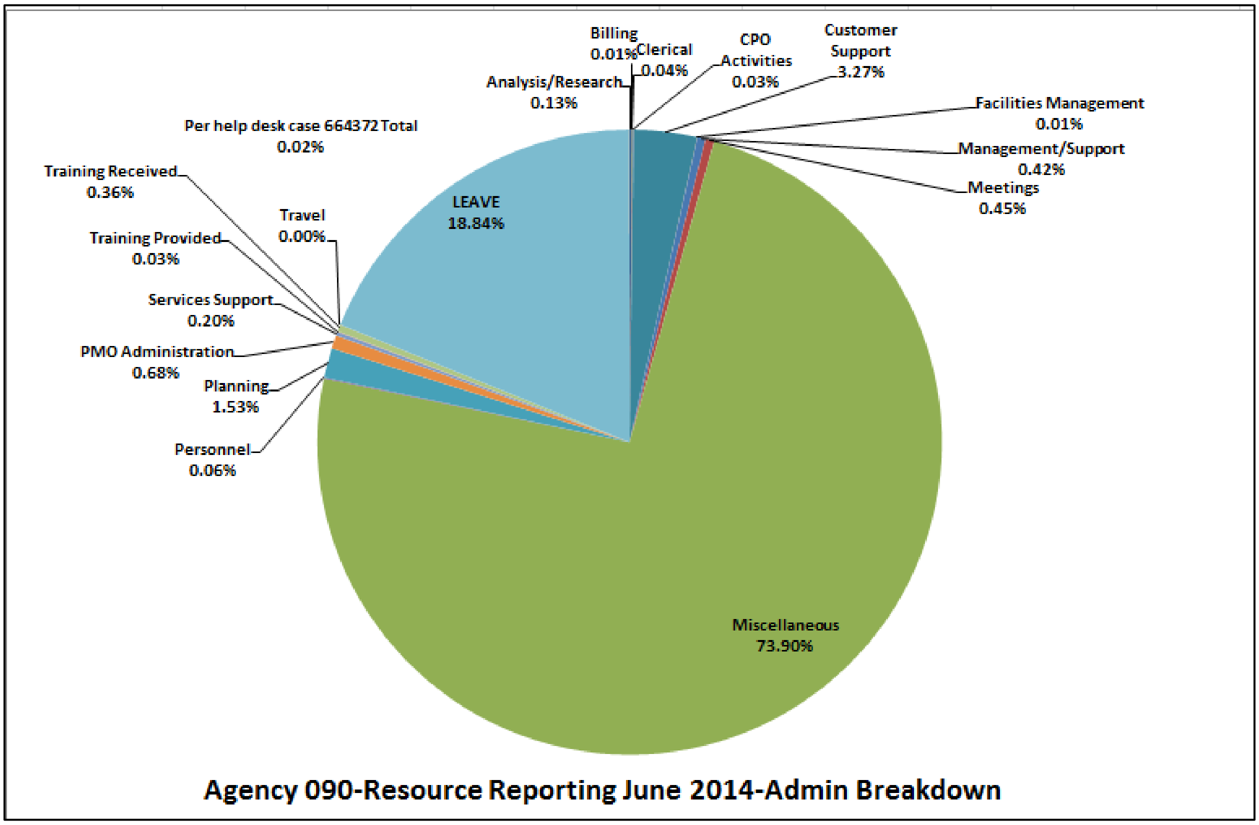
iii. Click **OK.** Then click the tab number 2.

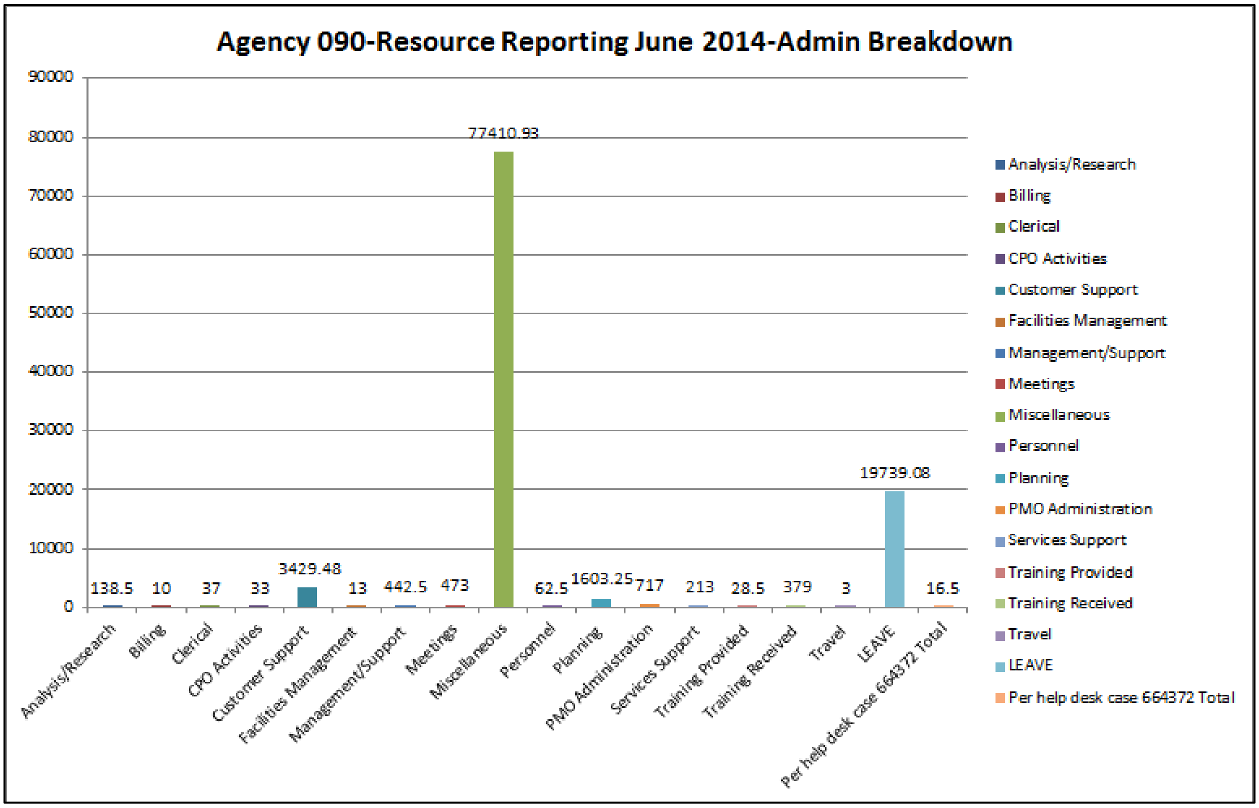
iv. You will now see the subtotals for each type of Admin time. If you click tab number 3, you can see the detail time information.

e. Now make a Column Chart and a Pie Chart as you did for the other data. The names of the graphs will be Agency ###-Resource Reporting June 2014-Admin Breakdown.

    i. **Note:** 1) Remove the word "Total" and "Adm" from the description to clean up the graph. 2) Move the Description column to the left of the sum of hours to make the graph work properly.

f. They should look similar to the following charts:





Templates have been created to streamline the report creation process. The graphs are formatted so all that needs to be done when using the templates is running the queries, sorting, and subtotaling data.