HRMS Reporting

Reference Manual  4-6-17

Office of Human Resources | humanresources.umn.edu
HRMS: hrms.umn.edu
Contact Center: 612-624-8647 or ohr@umn.edu

University of Minnesota
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Course Objectives

- Demonstrate an understanding of the human resource reports available within the Reporting Center.
- Demonstrate an ability to run human resource reports utilizing various prompts.
- Critically analyze human resource information contained in multiple reports.
- Utilize the available reference materials to understand business questions answered by each report.
Access/Security

Systems administered by OIT Data Security are requested using the Access Request Form. The current release of the Access Request Form and instructions for completing the form are available at www.umn.edu/datasec/security/RequestingaccessPDF.html

Systems by Data Type

Human Resources Systems
- DWHR Public Data
- DWHR Private Data
- DWPY (Data Warehouse Payroll)
- PeopleSoft (HRMS - Human Resources)
- PeopleSoft Appointment Inquiry
- PeopleSoft Appointment Update
- PeopleSoft Labor Distribution Correction PeopleSoft Encumbering (only)
- PeopleSoft Pay & Leave Entry
- PeopleSoft Pay Entry (only)
- PeopleSoft Leave Entry (Vacation & Sick Tracking)

IT Helpline

Phone: 1-4357 (1-HELP) or 612-301-4357
Email: help@umn.edu

The Technology Helpline will answer general Enterprise System access procedure questions and assist with:
- Internet IDs
- Internet passwords
- Duo, if you:
  - Need to be activated to use Duo.
  - Need help with registering a device.
  - Have been locked.
  - Don’t have access to your device(s) and need a bypass to authenticate.
The Reporting Center is a central report catalog for University faculty and staff to access Enterprise reports from UM Reports, UM Analytics, and PeopleSoft. Report categories include Finance, Research, Physical Asset Management, Human Resource Management, and Student Services. Navigation to the Reporting Center is through the MyU portal.

Navigate to www.myu.umn.edu and sign in using your Internet ID and password.

Additional security measures involve using Duo, a University cloud-based two-factor authentication solution providing easier access to enterprise-level applications.

Navigate to: Key Links > Reporting Center
Reporting Center (cont.)

Reports are organized in category folders. Reports can be located by browsing and expanding folders or by filtering by report title.

Clicking on a report title will open the prompts or criteria page to make selections and run the report. Reports may be set as favorites by clicking the blue star next to the report title.

Hovering over a report title will provide a report description. The Need Assistance area provides additional help, resources, and an FAQ.

The Reports Run For Me provides a consolidated access point to reports available from PeopleSoft Report Manager for Finance, HRMS, and Student.

Additional Reporting tool links are available in the area below Reports Run For Me.

Prompts for Reports

Some common prompts for reports include:

<table>
<thead>
<tr>
<th>Chartfield String</th>
<th>Campus (One or More)</th>
<th>Vice President (VP) Unit</th>
<th>College/Admin Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting Period</td>
<td>Colleges (One or More)</td>
<td>Entity</td>
<td>Position #</td>
</tr>
<tr>
<td>Mailing List</td>
<td>Email List</td>
<td>ZDeptID</td>
<td>Departments (One or More)</td>
</tr>
<tr>
<td>EmplID</td>
<td>Entry Date</td>
<td>Entry Type</td>
<td>Job Code</td>
</tr>
<tr>
<td>Empl Class</td>
<td>Begin Date</td>
<td>End Date</td>
<td>Fiscal year</td>
</tr>
<tr>
<td>Pay Groups</td>
<td>RRC/Financial Unit</td>
<td>Sponsored</td>
<td>Nonsponsored</td>
</tr>
<tr>
<td>Payroll Period</td>
<td>Journal ID</td>
<td>Effort Period</td>
<td>Term</td>
</tr>
</tbody>
</table>

Reporting Tips

Downloading into Excel, CSV, or PDF

The majority of the reports can be downloaded into an Excel, csv, or pdf file. Look for the icons above the report, click on the file type, and download the report into a new file type.

Group By

Certain reports will contain the group by option allowing an alternate data sort for the existing report. Options available in the drop-down will vary depending on the available options on the report. The <Submit> button refreshes the report request.
Information/Help

Reports typically contain an information icon. Click the icon to display definitions and descriptions on reporting elements.

Sorting

Certain reports will contain the ability to sort the data in columns A through Z or Z through A. Click the appropriate arrow to sort the displayed data differently.

Prompts for Queries

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>College ID</td>
<td>ZDeptID</td>
</tr>
<tr>
<td>Empl Class</td>
<td>Ending Date</td>
</tr>
<tr>
<td>Effective Date From</td>
<td>Effective Date To</td>
</tr>
<tr>
<td>Reports to Position #</td>
<td>From Date</td>
</tr>
<tr>
<td></td>
<td>To Date</td>
</tr>
<tr>
<td></td>
<td>Last Update on/after (MMDDYY)</td>
</tr>
<tr>
<td></td>
<td>EmplID</td>
</tr>
<tr>
<td></td>
<td>Oper ID</td>
</tr>
<tr>
<td></td>
<td>Begin Date</td>
</tr>
<tr>
<td></td>
<td>End Date</td>
</tr>
<tr>
<td>Position #</td>
<td></td>
</tr>
</tbody>
</table>

Query Tips

A few items to note for reporting criteria:

- Blank Values may also be entered for criteria by entering the word “(BLANK)” in the text box next to the prompt.

- In addition to the 12 regular accounting periods, the University has adjustment periods following period 12. Once adjustment periods are available in the financial system, the report can be run through the selected adjustment period.

- Due to the potentially large amount of data that could be returned, many reports must be run with at least one additional ChartField to the Fund to further define the data and run the report.

- In addition to the 12 accounting periods, the University has 4 adjustment periods following period 12. These periods are 913, 914, 915, and 998. Once the adjustment periods are available in the financial system, the report can be run through the selected adjustment period.
Human Resources Management

The Human Resource Management section of the Reporting Center contains links to the following reports and/or queries:

- Collegiate Personnel Plans
- EOAA
- HR Queries
- Human Resources
- Pay/Time Queries
- Payroll & Time
- Work Study

Expand each section to view the most commonly used reports and queries.
Each college or campus as appropriate, led by the dean or vice chancellor for academic affairs, must adopt a personnel plan that articulates which of the appointment options would be used by the college/campus, in addition to its regular faculty, in carrying out its teaching functions and to ensure the academic quality of its programs. The plan is to indicate the appropriate balance of responsibilities carried out by faculty and those carried out by academic staff (e.g., types of courses, advisement, clinical supervision) for which members of each group will be responsible.

The overall collegiate personnel plan must be developed through a process that includes substantial representation of tenured and tenure-track faculty, term faculty and academic professional and administrative staff and term faculty, as applicable, and must be approved by the normal college/campus governance processes and by the dean or vice chancellor for academic affairs. Appointments made to any position with responsibilities primarily for instruction (term [non-tenure track] faculty, teaching specialists, senior teaching specialists, lecturers, and senior lecturers) must also be made only in accordance with the plan.

**Available Reports within the Reporting Center**

- Teaching Appointment Plan (Historical)
- Teaching Appointment Summary (Historical)
- Teaching Supplemental Plan Summary (Historical)

Common prompts needed for these reports and/or queries include:

- Term and Year
- Campus
- College

When new plans are created, the updated reports will be available within the Reporting Center.
The University of Minnesota’s Office of Equal Opportunity and Affirmative Action (EOAA) was founded in 1972 to ensure that all University community members uphold federal and state civil rights laws and regulations, as well as University equal opportunity policies. The EOAA Office envisions a University community that is equitable—one that values the diversity of its workforce and student body and is free from discrimination and harassment. We act as a neutral party to advise individuals and departments about perceived, existing and potential discrimination, harassment, sexual violence, retaliation, and potential violations of the policy against nepotism through consultation and investigation.

EOAA reinforces the University commitment surrounding diversity in the workforce. Recruitment strategies can be measured by setting goals for specific faculty and academic non-faculty positions.

Throughout the search process, search committee members, hiring authorities, unit administrators, unit EOAA Liaison and Human Resource staff should be watching the composition of the pool of applicants as a way of assessing the effectiveness of the search.

Historic as well as position specific reports are available.

Available Reports within the Reporting Center

- Civil Service Workforce Analysis by Department (Historical)
- Civil Service Workforce and Goals by Campus/IPEDS Job Group Code (Historical)
- Civil Service Workforce and Goals by IPEDS/Job Group Code (Historical)
- EEO Goal-Setting
- Faculty Workforce and Goals by Department (Historical)
- Summary of Academic Non-Faculty Goals (Historical)

Common prompts needed for these reports and/or queries include:

- Campus
- Term and Year
- Position #
- Vice President Unit
- College/Admin Unit
- Entity
HR Queries

Queries specifically bookmarked in the Reporting Center pertaining to position data, job data, affiliate data, and additional pay.

Available Reports within the Reporting Center

- Additional Pay Audit
- Additional Pay for Active Employees
- Additional Pay on Inactive Job Records
- Affiliate Audit
- Emp - Missing Date of Birth
- Emp - Missing Degree Info
- Emp - Missing Gender
- Emp - Missing Home Address
- Emp - Missing SSN
- Emp - Over/Max/Under Min Salary
- Employees / Positions who report to Vacant Positions
- Employees who report to this Position / Emplid
- Expected End Date Audit
- Expected Return Date Audit
- Grad Assist - No Expected End Date
- Job Records Last Updated
- Position Data Last Updated By
- Position and Job Mismatches
- Salary Admin Plan
- Tenure Missing for Reg Faculty

Common prompts needed for these reports and/or queries include:

- Employee ID
- ZDeptID
- Department ID
- Operator ID
- Effective Dates To
- Effective Dates From
- Position #
Human Resources Management (cont.)

Human Resources

Queries and reports specifically bookmarked in the Reporting Center pertaining to job data, position data, and employee data.

Custom Campus Mailing and Email List

- Custom Campus Mailing and Email List
- Degree and Honors
- Employee Job History
- Employee Review Tracking
- Entry Activity
- Job Code Average Salary
- New Hires and Transfers In
- Notice of Appointment
- Personnel Basic Information
- Position Management Position List
- Position Management Vacant Position List
- Terminations and Transfers Out
- Training History

Common prompts needed for these reports and/or queries include:

- Employee ID
- College/Admin Unit
- ZDeptID
- Department ID
- Job Code
- College
- Employee Name
- Empl Class
- Fiscal Year
Human Resources Management (cont.)

Pay Time/Queries

Queries and reports specifically bookmarked in the Reporting Center pertaining to enrollment history, absence events, timesheets, and schedules.

Available Reports within the Reporting Center

- Absence - Emp with Incorrect Enrollment
- Absence Events for a Dept ID
- Absence Leave Entry (Pre-Upgrade)
- Comments - By Dept and DtRng
- Comments - By EE and DtRng
- Enrollment Roster by Dept
- Manual Override Rates by DeptID
- Manual Override Rates by EE
- Schedule assignment by Emp
- Schedules - Predefined
- Time - Compare Schedule to Std Hours by DeptID
- Time - Missing Punches by Dept
- Time - Needs Approval by ZDeptID or College
- Time - Payable by Date
- Time - Rate over 100.00
- Time Approval Status by Dept
- Time Exceptions - By Dept ID
- Time Reported by College
- Time Reported by ZDeptID
- Time Reporter Schedules by DeptID
- Time Reporter Schedules by EmplID
- Timesheet - ComboCode override

Common prompts needed for these reports and/or queries include:

- Employee ID
- Department ID
- ZDeptID
- Begin Date
- End Date
- Last Updated on (date)
- From Date
- Through Date
- Hours per week
- Reports To (Position #)
Human Resources Management (cont.)

Payroll & Time

Queries and reports specifically bookmarked in the Reporting Center pertaining to vacation, sick and comp balances, actual payroll data for singular employees or multiple employees.

Available Reports within the Reporting Center

- Bi-Weekly Overtime with Year-to-Date Totals
- Employee MultiYear Payroll Detail
- Employees With Change of Status in Pay Period
- Pay Change Report
- Payroll Actuals and Encumbrance Summary
- Payroll Pre-Confirmation
- Payroll Prior Pay Earnings
- Payroll Transactions
- Salary Distribution
- Salary and Fringe Detail by Pay Period
- Vacation, Sick and Comp Balances
- YTD Employee Distributions

Common prompts needed for these reports and/or queries include:

- Employee ID
- Department ID
- Fiscal Year
- RRC/Financial Unit
- College/Admin Unit
- ZDeptID
- Payroll Period
- Accounting Period
- College
- Journal ID
- Effort Period
- Sponsored
- Non-Sponsored
- ChartField String
Work Study

Queries and reports specifically bookmarked in the Reporting Center pertaining to work study such as awards, unmet awards and reimbursement and reconciliation of work study awards.

Available Reports within the Reporting Center

• Eligibility for Lower Tuition Fringe Rate Assistantship
• Employed Students with Maxed Work Study Awards and Unmet Need
• Employed Students with Unused Work Study Awards
• Work Study Reconciliation
• Work Study Reimbursement

Common prompts needed for these reports and/or queries include:

• Institution
• Student ID
• Student Name
• College
• Reporting Period (Fall/Spring)
• RRC/Financial Unit
The Reports Run for Me section of the reporting center includes reports run through PeopleSoft. These reports have been run for you, the specific user, and distributed. If there are no report outputs, you do not have any reports available to you.

The reports are run based on a specific set of parameters. You will not be asked for prompts.
The Payroll Verification report is accessible via [myu.umn.edu > Reporting Center > Reports Run for Me > PA VERIFY RPT](myu.umn.edu > Reporting Center > Reports Run for Me > PA VERIFY RPT). Use the filter feature to search for a specific date or ZDeptID. Click on the PDF file extension by date and ZDeptID within this report folder. The report is centrally run on Friday prior to payday. It is a required report used to reconcile payroll biweekly.

### Payroll Verification Report

**Company:** UMN UNIVERSITY OF MINNESOTA  
**Pay End Dt:** 12/13/2015  
**Check Dt:** 12/23/2015  
**Run Date:** 1/12/2016  
**Run Time:** 22:46:02

<table>
<thead>
<tr>
<th>Run Date</th>
<th>Earnings Code</th>
<th>DeptID</th>
<th>Prog</th>
<th>Project</th>
<th>Acct</th>
<th>Fin EmplID</th>
<th>ChartField1</th>
<th>ChartField2</th>
<th>CS</th>
<th>WS</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/12/2016</td>
<td>OME Overload</td>
<td>1000 11008 20000 700201</td>
<td>1,066.84</td>
<td>0.00</td>
<td>1,066.84</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1/12/2016</td>
<td>REG Regular Pay</td>
<td>1000 1112 24027</td>
<td>1,326.60</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1/12/2016</td>
<td>AUG Augmentation</td>
<td>1000 11005 20024</td>
<td>1,290.77</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1/12/2016</td>
<td>REG Regular Pay</td>
<td>1000 11006 20000</td>
<td>1,326.60</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total:** 11,520.48

---

**Name:** Anders.A.Gary  
**Earnings Code:** OME Overload  
**Comp Rt Hours:** 2.853  
**Earnings:** 2.853  
**DeptID:** Z1111

**Name:** Blott.Steven.Deven  
**Earnings Code:** AUG Augmentation  
**Comp Rt Hours:** 4.119  
**Earnings:** 4.119  
**DeptID:** 11012  
**DeptID:** 11008

**Name:** Cevlin.Ember  
**Earnings Code:** REG Regular Pay  
**Comp Rt Hours:** 13.75  
**Earnings:** 13.75  
**DeptID:** 4305234

**Name:** DeWhite.Lily.Mary  
**Earnings Code:** REG Regular Pay  
**Comp Rt Hours:** 13.75  
**Earnings:** 13.75  
**DeptID:** 4305324

---

**VERIFICATION**  
**APPROVAL**
The foreign national supporting document expiring warning report is a distributed report run for all employees at the University of Minnesota. It identifies foreign nationals with I9 issues that need to be resolved if they will continue to be paid. When reviewing the distributed reports, look for the most recent file with an extension .pdf.

### PY FN Exp Warn Rpt

<table>
<thead>
<tr>
<th>Name</th>
<th>Empid</th>
<th>Visa Type</th>
<th>Expiration Date</th>
<th>Days Left</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yang Yang</td>
<td>85599393</td>
<td>F1T</td>
<td>07-14-2013</td>
<td>5</td>
</tr>
</tbody>
</table>

Any employee on this report has upcoming or recent STATUS EXPIRATIONS, which if not extended or renewed, WILL PREVENT THE EMPLOYEE FROM WORKING beyond the expiration date.

To remain on the payroll after the expiration date, the employee MUST do the following:

**Expired F-1 visa status**
- Must extend Form I-20 by expiration date, and complete new I-9 form.

**Expired J-1 visa status**
- Must extend DS-2019 by expiration date, and complete new I-9 form.

**Expired H-1, TN, & O-1 visa status**
- Must bring H-1 approval notice (Form I-797) to complete new I-9 form. If the extension application has been sent to DHS prior to current expiration, Payroll Services must be notified to continue the employee on the payroll for an additional 120 days beyond the expiration.

**Expired Employment Authorization**
- Must present extended DHS employment document or card (I-988B, I-766) by the expiration date, and complete new I-9 form.

This is the ONLY notice Payroll Services will send. Payroll Services will NOT send an expiration notice to any listed employee(s). This is notice to the department to contact the employee(s).

If the new I-9 is not on file in Payroll Services by the expiration date, the employee will be deleted from the payroll effective that date. The department is expected to terminate the employee if valid documents are not on file.

Please remind your employees of their responsibility to keep their employment documents current at all times, and to inform Payroll Services of any extensions, renewals, or changes in status.

For any questions regarding updating the I-9 form or to make an appointment, contact Payroll Services at (612) 624-8647.
The Reporting Tools section of the Reporting Center contains links to the following additional reporting tools: Data Warehouse Web Query Tool, Enterprise Document Management System (EDMS), OVPR Research Reporting, and UM Analytics. The content areas covered in HRMS include:

- Data Warehouse Web Query Tool
- HRMS Query Viewer.
The Data Warehouse is a collection of data which can be used to support the University's operational and decision making processes. These data are organized by subject area, e.g., Financial, Payroll, and updated periodically from the U's operational information systems.

The Data Warehouse is broken down into specific subjects areas. Some of the areas covered include financial, payroll, HR, space, equipment inventory, and student information for the entire University. Student data is sub-divided further into Admissions, Enrollment, Graduate School, and Course data.

If access is granted, it enables employees to build their own queries. Available tools such as data dictionaries and FAQ's will be helpful when building queries.

- **Data Dictionaries**
- **Refresh Schedules**
- **Data Warehouse Table Load Information**
- **Data Warehouse Litserv Information**
- **Help for Oracle 9**
- **Subject Area Contacts**
- **Frequently Asked Questions**
- **Links**
- **PS Version 8.9 Changes**
- **Recommended Oracle Texts**
Choosing a Query Method
Click <Queries & Reports> then click the <Query> link.

1. Choose a query method.
   - Build a Query: Select to start “Point and Click” query building.
   - Free-From Query: Select to edit SQL directly.
   - Choose a Saved Query: Select to view a list of saved queries. Saved queries are loaded into the “EDIT” button.
   - Delete Saved Query: Select to see a list of saved queries and choose which ones(s) to delete.
   - Re-Group Saved Queries: Select to reorganize/categorize saved queries into groups.
   - List Saved Queries: Select to see all saved queries on one continuous list.

Click <Continue>.

2. Select a database.
   Based on the security, you will see a variety of databases options. For HRMS work, check the Human Resources (DWRH) public database.
3. Identify the tables for your query.
This page contains a list of tables in the subject area (database) selected. For help with selecting tables, click <Help> at the top of the page. Click <Name of the database> to access the data dictionary. See Appendix C for a list of tables.

- To select a table, scroll through the list in the box to the desired table and click on the table name.
- To choose more tables, hold down <Control> while clicking the next table name.
- Click <Continue> to move to the next page or click <Clear Choices> to clear the selections and start over.

4. Select the data elements for your query.
This page contains a list of all the fields (columns) available on the table(s) selected. For help in selecting columns click <Help> at the top of the page.

- To access a field definition, click on the name of the field name. This will access the data dictionary.
- The fields selected will appear as column titles across the top of the query results.
Data Warehouse Web Query Viewer (cont.)

- To select fields for a query, click on the box next to each field name. If more than one table has been selected, fields can be selected from each table.
- The order in which the fields were selected will be the order for the query.

Click <Continue> to move to the next page, or click <Clear Choices> to clear the selections and start over. Clicking <Original Selection> will return to the first fields selected.

5. Order columns.
This page allows for ordering the columns in the results from left to right across the top of the screen. This is not required. If the columns are not ordered, they will appear in the query results in the order selected from left to right. For help with ordering, click <Help> at the top of the page. This page also allows for sum and count functions on columns.

Ordering Columns

- To order your columns, enter an order number in the box in front of each column name. For example, 1 will be the first column to the left of the screen, 2 will follow to the right, etc.
- You can also rename the columns that have been selected on this page.
- To rename a column, type the new column name in the box to the right of the original column name.
Data Warehouse Web Query Viewer (cont.)

Sum and Count Functions

- To perform a sum or count function on a column, type the letter "s" or "c" in front of the column name. If you have typed an order number in the box, type the "s" or "c" after it. The query tool will automatically generate a group by clause.

- Click <Continue> to move to the next page, or click <Clear Choices> to clear selections and start over.

6. Set conditions.
   This page allows for conditions to be set that will limit the information returned in the query results. For help with entering conditions, click <Help> at the top of the page.

Select Distinct

- This page list the option of “SELECT DISTINCT”. This option tells the system to omit any duplicate rows in the results returned. Each row of the table(s) being queried contains different information from the other rows. However, because the query does not usually select all of the available information (fields) in the table(s), the results returned may contain duplicate rows.

Conditions

- Conditions will restrict the rows of data to be returned. A condition is set by inputting the desired value(s) (condition terms) for a selected field. Every row whose value for the selected
Data Warehouse Web Query Viewer (cont.)

field matches the condition terms will be returned. It is possible to set conditions on any field in the tables selected.

- To set a condition on a column, click on the drop-down arrow on the first box on the left, and select the column on which to place the condition. Select only one column in this list.

- The next box to the right contains a list of operators. Select the operator to be used in the where clause of the query.

- In the blank box to the right, enter the value for the condition. The condition terms must exactly match how the value appears in the field. Otherwise, no results will be returned. Values are case-sensitive.

- When conditions are specified, there are two additional options to consider: “Begin Group” and “And/Or”.

Begin Group…(End)

- Selecting “Begin Group” and “End” creates parenthetical statements from the conditions selected. Conditions inside parenthesis will be read before conditions outside parenthesis. If the “Begin” box is selected, the “End” box must also be selected, or the query will fail.

And/Or

- This choice is used to combine more than one condition. If conditions are connected by “AND”, only rows which satisfy all conditions are returned. If they are connected with “OR”, then a row is returned if it satisfies at least one condition.

The following information provides a summary of the kinds of values (condition terms) each condition can have. Enter only one value in the blank box as a condition term.

<table>
<thead>
<tr>
<th>Value</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal-To</td>
<td>Enter only one value in the blank box as a condition term.</td>
</tr>
<tr>
<td>Not-Equal-To</td>
<td></td>
</tr>
<tr>
<td>Greater-Than</td>
<td></td>
</tr>
<tr>
<td>Less-Than</td>
<td></td>
</tr>
<tr>
<td>Not-Greater-Than</td>
<td></td>
</tr>
<tr>
<td>Not-Less-Than</td>
<td></td>
</tr>
<tr>
<td>In</td>
<td>Enter two or more values, separated by commas (no spaces), for example, “1000,2000,3000”.</td>
</tr>
</tbody>
</table>
7. Sorting data.

This screen determines how the rows of data will be sorted. The rows of data are ordered (sorted) by the values of a selected column (field) in the query. More than one level of order (ordering by a different column) can be established in the event that certain rows contain the same values in the selected column. For help with sorting data, click <Help> at the top of the page.

- Each drop-down box includes the columns from the tables selected. Click the drop-down arrow to see the columns. Select the column on which to sort the rows of data. In the boxes on the right, select ascending or descending order for the columns selected. There can be as many as five columns on this page. Sorting is not required.
Click <Continue>, or click <Clear Choices> to clear the selections and start over.

8. Editing the query.
   This page allows for review of the query in the edit box. The query can be edited before submitting it. To edit, type the revisions into the query. For help with editing the query, click <Help> at the top of the page.

   ♦ Replace: To replace a work or number, enter the word or number to be replaced in the first box. Enter the word or number that will replace it in the second box. Click <Replace>.

   ♦ Choose Row Limit: Use the row limit when running a new query for the first time. Choose “10 Rows Paging” to see that the query returns results as expected, and then rerun the query with a larger row limit. Set the row limit for the query by clicking on the drop-down menu.

   ♦ Print to File: The form of output type for download. For example, Microsoft Excel may be selected as the location of the download.

   ♦ Do Not Display to Screen: Select this box to not display query results on the screen.

   ♦ Zip Output Files: Select this box to zip the file. If selected, the necessary software is needed to ‘unzip’ the file once the download is completed. This allows for compression of the file so that it will take less space to download the results.
Click <Submit Query>, or click <Clear Query> to clear the selections. This will clear selections made to “Print to File” and “Choose Row Limit” boxes. It will also clear any revisions made to the query in the edit box. The query will revert back to whatever was originally loaded on the web page.

9. Query results.
This page will display the results of the query. In the results, the column names can be clicked on to see the data dictionary definition of the column. For help with saving the queries and query results, click <Help> at the top of the page.

- To save the query into a group, enter a group name or click on the drop-down box under “Group Query By”. The drop-down list will display group names previously created. Enter a new query description under “Enter Query Description” or choose a description from the drop-down list. Click <Save Query> to save the query. The next page will show the list of saved queries including the one just saved.

- This allows for saving the query under the logged in ID and password, so that it can be run again at a later date. The query will stay in the system until it is deleted. To rerun the saved query, select “Choose a Saved Query” from the Data Warehouse Login page. There is an option to change some or all of the conditions before rerunning.
HRMS Query Viewer

PeopleSoft Query Viewer can be used to extract information at any time by using the University’s pre-defined queries. These queries are set up to provide information that users need on a frequent basis.

⚠️ Caution: Not all queries found in Query Viewer are valid. Only valid queries bookmarked on the Reporting Center or specifically referenced in job aids have been validated.

Query Naming Conventions

When searching for a query that is not listed under Human Resources Management in the Reporting Center, use the naming conventions below.

- Each query starts with “UM_” followed by a code for the area as shown here.
- Enter part of the query name, if known, to shorten the list of queries that return.

<table>
<thead>
<tr>
<th>Code</th>
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<td>RS_</td>
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<tr>
<td>TL_</td>
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</table>

Run a Query Process

- Navigate to MyU > Key Links > Reporting Center.
- Locate the query under the Human Resources Management heading and click the query name.
- To search for a query, click <HRMS Query Viewer> under the Reporting Tools heading. The search page displays.
- In the Begins with field, enter “UM_” followed by the appropriate code shown in the table above. For example: “UM_TL_” for Time and Labor queries.
- Click <Search>. A list of queries appears.
- Scroll through the list to find the query. Click the Excel link in the row.
- The query may request more input. Enter the appropriate data and click <View Results>.
- If the query requires no further input, the results appear in PeopleSoft with the option to export the information. Click <Excel SpreadSheet>.
- Once the query results are in Excel, search, filter, save, or print the file as needed.
Appendix A: Policies

Information Technology

policy.umn.edu/it

Human Resources

policy.umn.edu/hr

Review the University of Minnesota Policy website to read detailed policies related to:

- Benefits
- Compensation
- Contracts and Governing Documents
- Departure
- Hiring
- Leaves
- Performance
- Miscellaneous

Acceptable Use of Information Technology Resources

Computers and other information technology resources are essential tools in accomplishing the University’s mission. Information technology resources are valuable community assets to be used and managed responsibly to ensure their integrity, confidentiality, and availability for appropriate research, education, outreach and administrative objectives of the University of Minnesota. University community members are granted access to these resources in support of accomplishing the University’s mission.

All users of University information technology resources, whether or not affiliated with the University, must follow University policies; federal, state and local laws; and contractual obligations. These include but are not limited to information security, data privacy, commercial use, and those that prohibit harassment, theft, copyright and licensing infringement, and unlawful intrusion and unethical conduct.

Units that grant guest access to information technology resources must make their guests aware of their acceptable use responsibilities.
Appendix A: Policies (cont.)

Acceptable Use

Acceptable use includes, but is not limited to respecting the rights of other users, avoiding actions that jeopardize the integrity and security of information technology resources, and complying with all pertinent licensing and legal requirements.

Users must comply with applicable laws and regulations, contractual agreements, Board of Regents and Administrative policies, and licensing agreements.

Users must use only information technology resources they are authorized to use and only in the manner and to the extent authorized. Ability to access information technology resources does not, by itself, imply authorization to do so.

Users are responsible for protecting their University-assigned accounts and authentication (e.g., password) from unauthorized use.

Users must abide by the security controls on all information technology resources used for University business, including but not limited to mobile and computing devices, whether University or personally owned.

Users of information technology resources are responsible for the content of their personal communications and may be subject to liability resulting from that use. The University accepts no responsibility or liability for any personal or unauthorized use of its resources by users.

Unacceptable Use

Users are not permitted to share authentication details or provide access to their University accounts to anyone else.

Users must not circumvent, attempt to circumvent, or assist another in circumventing the security controls in place to protect information technology resources and data.

Users must not knowingly download or install software onto University information technology resources which may interfere or disrupt service, or does not have a clear business or academic use.
Appendix A: Policies (cont.)

Users are prohibited from willingly engaging in activities that interfere with or disrupt network users, equipment or service; intentionally distribute viruses or other malicious code; or install software, applications, or hardware that permits unauthorized access to information technology resources.

Users must not engage in inappropriate use, including but not limited to:

- Activities that violate state or federal laws, regulations or University policies.
- Harassment.
- Widespread dissemination of unsolicited and unauthorized electronic communications.

Users must avoid excessive use of system information technology, including but not limited to network capacity. Excessive use means use that is disproportionate to that of other users, or is unrelated to academic or employment-related needs, or that interferes with other authorized uses. Units may require users to limit or refrain from certain activities in accordance with this provision.

The University provides authorized individuals access to information they need to carry out work responsibilities.

Data custodians must limit access to University information classified as private data to those individuals whose work responsibilities require it. Employees and departments must follow the appropriate approval processes to request access to non-public information.

Individuals authorized by their job responsibilities to share University data with internal audiences must follow the procedures related to sharing University data, including instructions on aggregating data where appropriate.

The Records and Information Management Office is a resource for questions concerning disclosure of information.
Appendix B: Journal ID Prefixes for HRMS

Journal numbers are assigned by the financial system using a prefix to indicate the originating source of the journal. The prefixes listed below all originate from the HR system.

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Appendix C: Data Warehouse Human Resource Tables

**DWPA_POSTING**

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**DWPA_POSTING_CONV_BU**

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Appendix C: Data Warehouse Human Resource Tables (cont.)

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<td>FISCAL_YEAR</td>
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<td>FUNDING_END_DT</td>
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<td>HP.FUNDING_END_DT</td>
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<td>HP.LastName</td>
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<tr>
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<tr>
<td>POSITION_POOL_ID</td>
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<td>SETID</td>
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<tr>
<td>DEPTID</td>
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<tr>
<td>EMPLID</td>
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</tr>
<tr>
<td>JOBCODE</td>
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<tr>
<td>PERCENT_EFFORT</td>
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<tr>
<td>POSITION_NBR</td>
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<td>SETID</td>
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</table>

**HR_PS_EG_RANK_TBL**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EFFDT</td>
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</tr>
<tr>
<td>EFF_STATUS</td>
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</tr>
<tr>
<td>EG_ACADEMIC_RANK</td>
<td></td>
</tr>
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<td>EG_AUTO_TNR_FLAG</td>
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</tr>
<tr>
<td>EG_GROUP</td>
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<tr>
<td>EG_PARTIAL_FLAG</td>
<td></td>
</tr>
<tr>
<td>EG_RANK_RANK</td>
<td></td>
</tr>
<tr>
<td>EG_REG_PROB_PRO</td>
<td></td>
</tr>
<tr>
<td>EG_TRACK_FLAG</td>
<td></td>
</tr>
<tr>
<td>HP_STATS_RANK_CD</td>
<td></td>
</tr>
<tr>
<td>DESCR</td>
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<tr>
<td>DESCRIPTOR</td>
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</tr>
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<tr>
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<td>EG_REG_PROB_PRO</td>
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<tr>
<td>HP_STATS_RANK_CD</td>
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Appendix C: Data Warehouse Human Resource Tables (cont.)

HR_PS_EMPL_CLASS_TBL

<table>
<thead>
<tr>
<th>DATA_TYPE_CD</th>
<th>DESCR</th>
<th>DESCRSHORT</th>
<th>EFFDT</th>
<th>EFF_STATUS</th>
<th>EMPL_CLASS</th>
<th>SETID</th>
</tr>
</thead>
</table>

HR_PS_HCDL_MYDLGTOR

<table>
<thead>
<tr>
<th>DELEGATOR_ID</th>
<th>DELEGATOR_OPRID</th>
<th>DELEGATOR_RCD</th>
<th>DEPTID</th>
<th>DEPTNAME</th>
<th>END_DAY_IND</th>
<th>FROM_DATE</th>
<th>GROUP_SEQ_NUM</th>
<th>JOB CODE</th>
<th>JOBTITLE</th>
<th>NOTIFY_DELEGATOR</th>
<th>FNLRGRPNAME</th>
<th>TRANS_ALLOWED</th>
</tr>
</thead>
</table>

HR_PS_HCDL_MYPROXY

<table>
<thead>
<tr>
<th>APPCLASS_PATH</th>
<th>DELEGATOR_ID</th>
<th>DELEGATOR_OPRID</th>
<th>DELEGATOR_RCD</th>
<th>DLGT_REQ_STATUS</th>
<th>DLGT_STATUS</th>
<th>END_DAY_IND</th>
<th>GROUP_SEQ_NUM</th>
<th>MESSAGE NBR</th>
<th>MESSAGE_SET_NBR</th>
<th>NOTIFY_DELEGATOR</th>
<th>PACKAGEROOT</th>
<th>PROXY_ID</th>
<th>TO_DATE</th>
<th>TRANSACTION_NAME</th>
<th>TRANS_ALLOWED</th>
</tr>
</thead>
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## Appendix C: Data Warehouse Human Resource Tables (cont.)

### HR_PS_JOBCODE_TBL

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>ACTIVITY TYPE FRA</td>
<td>Ann CTACT HRS AUS</td>
</tr>
<tr>
<td>BARG UNIT</td>
<td>BA CD</td>
</tr>
<tr>
<td>CAN PAYED JOB CLS</td>
<td>CASUAL TYPE AUS</td>
</tr>
<tr>
<td>COMP FREQ CLS</td>
<td>CURRENCY CD</td>
</tr>
<tr>
<td>DIRECTLY TIPPED</td>
<td>EEO1CODE</td>
</tr>
<tr>
<td>EEO CODE</td>
<td>EEO JOB GROUP</td>
</tr>
<tr>
<td>EG ACADEMIC RANK</td>
<td>EG GROUP</td>
</tr>
<tr>
<td>EMP CATEGORY FRA</td>
<td>ENCMBER INDC</td>
</tr>
<tr>
<td>FA PAY PROGRAM</td>
<td>FLSA STATUS</td>
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<tr>
<td>FP BUSINESS CD</td>
<td>FP JOECD ACC</td>
</tr>
<tr>
<td>FP MATRIX CD</td>
<td>FP MATRIX TYP</td>
</tr>
<tr>
<td>FUNCTION AUS</td>
<td>FUNCTION CD</td>
</tr>
<tr>
<td>GVT CLS STANDARD</td>
<td>GVT DT CLASSIFIED</td>
</tr>
<tr>
<td>GVT FUNC CLASS</td>
<td>GVT FUND SOURCE</td>
</tr>
<tr>
<td>GVT NFG FUNCNT CD</td>
<td>GVT NFG PI IND QVR</td>
</tr>
<tr>
<td>GVT OFF TITLEPREFIX</td>
<td>GVT OPM CERT NBR</td>
</tr>
<tr>
<td>GVT PAREN TITLE</td>
<td>GVT PATCEN CD</td>
</tr>
<tr>
<td>GVT PERF PLAN</td>
<td>GVT PI UPD IND</td>
</tr>
<tr>
<td>GVT POSN SENS CD</td>
<td>GVT POSN TITLE CD</td>
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<td>HP STATS DUTIES</td>
<td>HP STATS RPT FLAG</td>
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<tr>
<td>IPEDSCOD</td>
<td>IN/EL CODE</td>
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<tr>
<td>JOB CTG FRA CD</td>
<td>JOB ACNTAS PCT</td>
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<tr>
<td>JOB FCI</td>
<td>JOB ACNTAS POINTS</td>
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<tr>
<td>JOB KNOWHOW POINTS</td>
<td>JOB FUNCTION</td>
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<tr>
<td>JOB SUB BSC</td>
<td>JOB KNOWHOW PCT</td>
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<tr>
<td>LASTUPDDPERD</td>
<td>LABOR AGREEMENT</td>
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<tr>
<td>MED SURV REG</td>
<td>MANAGER LEVEL</td>
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<td>PKG TEMPLATE ID</td>
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<tr>
<td>PKG TEMPL_NAME</td>
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<td>RETRO PERCENT</td>
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<td>SAL RANGE FREQ</td>
<td>MIL RANK</td>
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<td>SEASONAL</td>
<td>MIL RANK</td>
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<tr>
<td>STD HRS FREQUENCY</td>
<td>MIL RANK</td>
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<tr>
<td>TEACH WEEKS AUS</td>
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<td>UNION CD</td>
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<td>WORKDAY HOURS</td>
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<td>WORKING COMP CD</td>
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</table>
Appendix C: Data Warehouse Human Resource Tables (cont.)

HR_PS_JOB_FAMILY_TBL
HR_PS_NAMES_VW
HR_PS_SAL_GRADE_TBL
HR_PS_TI_RPTD_TIME
HR_PS_UM_EE_CLASS_TBL
HR_PS_UM_EMPLOYEES_PUB_VW
HR_PS_UM_EMP_COMP_VW
HR_PS_UM_HRACTGLN_VW
HR_PS_UM_JC_CAT_FLAT
HR_PS_UM_JOBCODE_COMP
HR_PS_UM_JOB_CNV
HR_PS_UM_POI_DETAIL
HR_PS_UM_RS_JOBS_RPTG
HR_PS_VALID_COMBO_TBL
PS_DHWR_POSITION_DATA_CONV_BU
PS_DHWR_SESSN_EXPENSE_CONV_BU
PS_DWEO_PERSON_PRIM_JOB_HS_VW
PS_DWEO_PERSON_PRIM_JOB_VW
PS_DWEO_PERSON_SEC_JOB_HS_VW
PS_DWEO_PERSON_SEC_JOB_VW
PS_DWHR_ACCOMPLISHMENTS
PS_DWHR_ACCOPLISHMENTS_PRE
PS_DWHR_ADDL_PAY
PS_DWHR_ADDL_PAY_PRE
PS_DWHR_ADDL_PAY_VW
PS_DWHR_AHC_MEDICAL
Appendix C: Data Warehouse Human Resource Tables (cont.)

PS_DWHR_BUSINESS_TITLES
PS_DWHR_COMP_PROP
PS_DWHR_COMP_PROP_CONV_BU
PS_DWHR_COURSE
PS_DWHR_CRSE_SESS_DATES
PS_DWHR_CRSE_SESS_INSTR
PS_DWHR_CRSE_SESSION
PS_DWHR_CRS_SESSION_CONV_BU
PS_DWHR_CRS_SESS_DATES_CONV_BU
PS_DWHR_DEMO_ADDR_PRE
PS_DWHR_DEMO_ADDR_VW
PS_DWHR_DEMO_AEL_TC_VW
PS_DWHR_DEMO_CAMPUS_MAIL_TC_VW
PS_DWHR_EMP_REVIEW_CONV_BU
PS_DWHR_JOB
PS_DWHR_JOB_CONV_BU
PS_DWHR_JOB_HIST
PS_DWHR_JOB_HIST_CONV_BU
PS_DWHR_JOB_POI_UNS_VW
PS_DWHR_JOB_PRE
PS_DWHR_JOB_REQUISITION
PS_DWHR_JOB_REQUIS_TYPE
PS_DWHR_J_EMP_JOB_00
PS_DWHR_J_EMP_JOB_99
PS_DWHR_PERSON_COMPETENCY
PS_DWHR_PERSON_COMPETENCY_PRE
Appendix C: Data Warehouse Human Resource Tables (cont.)

PS_DWHR_POI_UNS
PS_DWHR_POSITION_DATA
PS_DWHR_POSITION_DATA_PRE
PS_DWHR_SESSN_EQUIP_CONV_BU
PS_DWHR_SES_INSTR_COST_CONV_BU
PS_DWHR_TRAINEE
PS_DWHR_TRAINEE_CONV_BU
PS_DWHR_TRAINEE_HIST
PS_DWHR_TRAINEE_VW
PS_DWHR_UM_AFFILIATES
PS_DWHR_UM_DEPT_TREE_00
PS_DWHR_UM_ENTITY_ZDEPTID_MAP
PS_DWHR_UM_TENURE
PS_DW_DEPTID_FISCAL_TREE
PS_DW_UNIVERSITY_EMAIL
## Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account ChartField</strong></td>
<td>Account classifies which asset, liability, equity (fund balance), expense, revenue or statistical account will be affected. Both budget-only and actual values have been established.</td>
</tr>
<tr>
<td><strong>Accounting Period</strong></td>
<td>A number that designates the month of activity.</td>
</tr>
<tr>
<td><strong>Advance Account</strong></td>
<td>A financial account established for use after the start date of the project, but before the award process has been completed, in order to facilitate administrative establishment of the project.</td>
</tr>
<tr>
<td><strong>Action</strong></td>
<td>Description identifying the action taken on the employment record.</td>
</tr>
<tr>
<td><strong>Activity ChartField</strong></td>
<td>One numeric character, required when Project is used. The activity ChartField currently has no meaning for the University of Minnesota. Only the value of “1” is used.</td>
</tr>
<tr>
<td><strong>Actuals Accounts</strong></td>
<td>Account values that are used on journal entries. Actuals provide information on a more detailed level than budget-only accounts</td>
</tr>
<tr>
<td><strong>Allocable</strong></td>
<td>A cost that can be assigned to a project that meets a specific project objective based on relative benefits received. A cost may be allocable to a specific project but paid for by the University, depending on what the sponsor determines is allowable for a particular type of project.</td>
</tr>
<tr>
<td><strong>Allowable</strong></td>
<td>A cost that can be charged to a project per sponsor guidelines. A cost may be allowable per sponsor guidelines, but if it does not meet any specific project objectives, it is not allocable.</td>
</tr>
<tr>
<td><strong>Annual Base Benefit Rate</strong></td>
<td>Prior to 9.2 HRMS Upgrade, appointments had an annual base benefit rate identifying the full compensation of the employee annually based on the appointment term. This term is no longer used.</td>
</tr>
<tr>
<td><strong>Annual Rate</strong></td>
<td>This is the Institutional Base Salary (IBS) for an employee’s job record. It is reduced if the employee is working less than 40 hours. However, only their BASE is reduced. This amount will combine all components of pay and be reflective of the employee’s IBS. Amount is reflective of what will be paid on the employee’s contract. This will include Base Salary (BASE), Increments (INCR), Augments (FAA, AAA), and Regent (REGENT) pay.</td>
</tr>
<tr>
<td><strong>Appt Term</strong></td>
<td>The appointment term represents the length of an appointment, in months and the dates. Exact dates change annually. Standard appointment terms range from 9 to 12 months. <strong>Note:</strong> Appt Term is replaced by Paygroup with the change from 8.9 to 9.2 Peoplesoft.</td>
</tr>
</tbody>
</table>
Terminology (cont.)

Appt Type  A code representing specific conditions of employment associated with the employment record. Codes 1-6 are used with staff appointments only, and codes A-Z are used with academic appointments only. 

Note: Appt Type is replaced by Employee Class with the change from 8.9 to 9.2 Peoplesoft.

Budget-Only Accts  Account values that represent rollups of the actual account values, used for budget development and final budgeting only.

Budget Period  Internal funding period of an award, usually 12 months. The project period is divided into budget periods for budgetary and funding purposes.

Carry Forward  Unexpended funds carried from one budget period to another.

Chart of Accounts (COA)  A series of systematically classified financial values, compatible with an institution’s structure, and supporting central and distributed financial reporting.

ChartField 1 (CF1)  Ten characters, alphanumeric. CF1 is an optional, centrally defined field with a centrally defined rule set. This field may be used in conjunction with CF2 if a department needs more identifiers for reporting needs.

ChartField 2 (CF2)  Ten characters, numeric. CF2 is an optional field, defined at the department, college, or RRC level. This field may be used in conjunction with CF1 if a department needs more identifiers for reporting needs.

ChartField String  A combination of ChartFields, usually including at a minimum Fund DeptID, Account, and Program or Project.

Clause  A command using one of the following verbs to retrieve data from a database: SELECT, FROM, WHERE, GROUP BY, HAVING, ORDER BY.

Collaborator  An individual involved with the principal investigator in the scientific development or execution of the project. This individual would typically devote a specific percent of effort to the project and would be identified as key personnel. The collaborator may be employed by, or affiliated with, either the grantee organization or an organization participating in the project under a consortium or contractual agreement.
**College Code**
UM college code representative of the department, ZDeptID, or academic unit from which the employee left. College code consists of 4 alpha characters (e.g., TMED).

**Column**
Used in reference to a relational database table. A table can be envisioned as a two-dimensional structure with a column identified as a vertical set of data (contrast with row).

**Comp Rate**
The hourly rate of pay associated with the compensation of the employee.

**Company**
The Company to which the position is assigned, either Company UMN or Company UNS.

**Competing Proposal**
Proposal for funding that is not guaranteed, and the application is pooled with other proposals for review.

**Conditions**
Qualifications for the data you would like to see. In SQL, conditions are encoded in the WHERE statement and have the effect of restricting the rows returned from the queried table(s).

**Conflict of Interest**
Occurs when an employee compromises professional judgment in carrying out University teaching, research, outreach, or public service activities because of an external relationship that directly or indirectly affects the financial or business interests of the employee, an immediate family member, or an associated entity.

**Continuation Application**
An application for continued support on current projects already funded by the sponsor.

**Contract**
An agreement where the sponsor has more involvement and uses the project to achieve a specific outcome or deliverable.

**Cooperative Agreement**
An agreement where the sponsor has substantial involvement in the project. The sponsor and the grantee work together to achieve a specific objective.

**Cost Overrun**
Direct costs incurred and charged to a sponsored project in excess of the awarded amount.

**Cost Reimbursable**
An agreement in which the sponsor funds the project to the extent described in the award notice. The University is reimbursed by the sponsor only for actual costs incurred; any unspent funds revert to the sponsor.
Terminology (cont.)

Cost Share CF  Two alpha characters, conditional. This ChartField is used whenever a Program and Project share costs. When applicable, the characters “CS” are entered in this field, which acts as a trigger to invoke the cost-sharing process. When CS is used, both a Program value and a Project value are required. This field cannot be used to share costs between two nonsponsored Program accounts.

Cost Sharing  Type of arrangement in which more than one party supports a project. University generally refers to cost sharing when looking at labor items. (See “Matching Funds.” See also “Cost Share ChartField.”)

Curr Head Cnt  The field indicating the number of incumbents associated with the position number. This number may be one if the intent is a single incumbent or more if there are or will be multiple incumbents in the same position.

Data Dictionary  Information about each database in a data warehouse, including table and column names, and definitions.

Data Warehouse  A collection of databases, in a client/server environment, formatted for easy reporting. Access is read only. The information is copied from operational systems regularly, and is reformatted to allow information from different systems to be combined. It is designed for easy access and customized reporting of information crucial to the University’s business needs.

Department  The Department (5-digit DeptID) to which the position is assigned. Displayed is the DeptID code. Displayed in the header is the DeptID and description. Answers the question “What management unit is responsible for the financial transactions?”. DeptID identifies the organization at the University where budgets, staff, or academic programs are managed. Required on all transactions. DeptID code consists of 5 numerical characters (e.g., 11922).

DeptID  Five numeric digits, required. DeptID is a required ChartField that answers the question, “What is the level of responsibility at which I need to be able to isolate a group of financial resources, employees, or academic programs to support effective management of financial, human, and academic resources?”

Direct Costs  Costs directly incurred by the project.
<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dt of Last Updt</strong></td>
<td>This is the Date of the Last Update (LAST_UPDATE_DTTM).</td>
</tr>
<tr>
<td><strong>Effective Date</strong></td>
<td>The calendar date associated with a human resource activity. The date used should accurately reflect when a transaction should truly be effective—not necessarily when a transaction was entered into HRMS.</td>
</tr>
<tr>
<td><strong>Effective Sequence</strong></td>
<td>The numbering of additional transactions that occur on a transaction on the same effective date.</td>
</tr>
<tr>
<td><strong>Effort</strong></td>
<td>Work or the proportion of time spent on any activity and expressed as a percentage of total time.</td>
</tr>
<tr>
<td><strong>EmplID</strong></td>
<td>The employee identification number is a unique key PS personal identification number assigned to all students/staff/faculty/applicants. (The student ID will be used as the employee ID if the employee is or was also a student at the University of Minnesota.)</td>
</tr>
<tr>
<td><strong>Empl Rcdno</strong></td>
<td>Unique identifier for each job record number for the incumbent in the position.</td>
</tr>
<tr>
<td><strong>Employee Class</strong></td>
<td>Displays the employee class and description. Indicates the employee classification (e.g., ACP - Academic Professional, FAR - Faculty-Regular, CVL – Civil Service). Employee Classifications categorize employees (Faculty, P&amp;A, Civil Service, Union Represented, Students, etc.) for HR, Benefits, Fringe and Payroll Accounting purposes. Note: Employee Classes have changed from 1 character to 3 character values with the change from 8.9 to 9.2 Peoplesoft. For example: 2 - Civil Svc/ Barg Unit has changed to CVL - Civil Service.</td>
</tr>
<tr>
<td><strong>Encumbrance</strong></td>
<td>Represents outstanding purchase orders and other commitments for materials or services not yet received. This information is pulled from the Commitment Control ledger for business unit UMN01. It can be correlated to the data found in the PeopleSoft table PS_Ledger_KK.</td>
</tr>
<tr>
<td><strong>Facilities and Administrative (F&amp;A) Costs</strong></td>
<td>In its 1996 revision of OMB Circular A-21, the federal government replaced the term “indirect costs” with “facilities and administrative costs.” According to OMB Circular A-21, F&amp;A costs are “costs that are incurred for common or joint objectives and, therefore, cannot be identified readily and specifically with a particular sponsored project, an instructional activity, or any other institutional activity.”</td>
</tr>
</tbody>
</table>
**Terminology (cont.)**

**Fin EmplID**
Seven numeric digits, optional. Fin EmplID is an optional field to be used when the financial activity must be identified with a specific employee. Fin EmplID provides an additional level of detail below DeptID or Program, or cross-DeptID or cross-Program information pertaining to a single employee. Fin EmplID uses the employee ID number assigned by Human Resources.

**Fiscal Year (FY)**
Any 12-month period for which institution monitors its annual accountability. At the University, this period is July 1 – June 30. Report displays salary information back to FY 2009.

**Fixed Fee**
In a fixed fee award, the PI agrees to accomplish project objectives within a specific time frame for a set dollar amount per patient, per hour, or other unit. The total award amount is based on an estimated number of units and is subject to downward adjustment based on the actual number of units completed. Sponsor approval is required to exceed the estimated number of units. The fee per unit remains constant, even if the actual cost per unit is above or below that amount. Any overexpenditures are the responsibility of the department, and earned unspent revenue does not revert to the sponsor. If the deliverables are not completed within the award period, the contract must be extended.

**Fixed Price**
In a fixed price award, the PI agrees to accomplish project objectives within a specific time frame for a set dollar amount. If the deliverables are not completed within the award period, the contract must be extended. The award amount also remains constant, even if actual costs for the project are above or below it. Any overexpenditures are the responsibility of the department, and unspent funds do not revert to the sponsor.

**FTE**
Indicates the Full Time Equivalent for each budgeted incumbent (e.g., 30 hours/wk = .750 FTE).

**Function**
Four-digit, required attribute of Program or Project. Function indicates the purpose of a project or program. Function codes answer the questions, “What is the purpose of this activity?” or “How does this program or project accomplish the mission of the University?”

**Fund**
Four numeric digits, required. Fund indicates the individual or cumulative sources of funds, which may be restricted or unrestricted. Fund codes answer the question, “What broad restrictions or reporting requirements have been imposed on these funds?”
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift</td>
<td>Money or property transferred to the University via a recognized University foundation that is not intended to result in direct economic benefit, goods, or services to the donor.</td>
</tr>
<tr>
<td>Grade</td>
<td>The pay range within the Salary Administration Plan to which the job code of the employment record is assigned (unless it has been manually changed). The grade must be associate with a sal_admin_plan to have meaning.</td>
</tr>
<tr>
<td>Grant</td>
<td>A pledge of support where the sponsor has little involvement and the Principal Investigator (PI) devises the project. Example: A sponsor requests proposals for projects involving the Americans with Disabilities Act. The PI proposes a project to devise an electric wheelchair, and it is funded without major revisions by the sponsor.</td>
</tr>
<tr>
<td>Grant Administrator</td>
<td>Sponsored Projects Administration (SPA) employee who helps manage the sponsored project.</td>
</tr>
<tr>
<td>Indirect Costs (IDC)</td>
<td>See “Facilities and Administrative (F&amp;A) Costs.”</td>
</tr>
<tr>
<td>IDC Rate or F&amp;A Cost Rate</td>
<td>A composite rate applied to sponsored projects as a percentage of the sponsored project's direct costs for the purpose of charging the sponsored project its share of the University’s F&amp;A/IDC’s.</td>
</tr>
<tr>
<td>In-Kind</td>
<td>The University considers “in-kind” to be interchangeable with “matching” or “cost sharing,” but the term may refer to costs borne by an external organization, for example, when individuals at another organization volunteer their time.</td>
</tr>
<tr>
<td>Incumbent EmplID</td>
<td>Employee identification number for the incumbent in the position. The EmplID is assigned to all faculty and staff.</td>
</tr>
<tr>
<td>Job Code</td>
<td>The code representing the job classification for the employee in this position. Consists of up to 6 alphanumeric characters. See HR Business Processes &amp; Job Aids for more info.</td>
</tr>
<tr>
<td>Job Opening Nbr</td>
<td>The job number of the position for which the employee was hired.</td>
</tr>
<tr>
<td>Last Dt Worked</td>
<td>This date represents the last date the employee was on site working for the University. It is calculated by PeopleSoft to be one day prior to the termination date.</td>
</tr>
</tbody>
</table>
### Terminology (cont.)

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mandatory Cost Sharing</strong></td>
<td>Cost sharing that is required by the sponsor, is stated on the Notice of Grant/Contract Award (NOGA), must be documented, and must be reported to the sponsor.</td>
</tr>
<tr>
<td><strong>Matching</strong></td>
<td>The terms “cost sharing,” “matching,” and “in-kind,” refer to that portion of the total project costs not borne by the sponsor. The University generally refers to matching when looking at nonlabor items. Cash funds are usually required by sponsors for equipment acquisition programs, specialized research centers, or other multi-disciplinary programs. Typically these funds are provided by the institution.</td>
</tr>
<tr>
<td><strong>Max Head Cnt</strong></td>
<td>The field indicating the maximum number of incumbents in the department or administrative unit associated with the position number. This number may be one if the intent is a single incumbent or more if there are or will be multiple incumbents in the same position. To calculate the number of vacancies for a position, subtract the Curr Head Cnt column from the Max Head Cnt for that position.</td>
</tr>
<tr>
<td><strong>Modified Total Direct Costs (MTDC)</strong></td>
<td>Total direct costs less certain budget categories. Budget categories to be subtracted from total direct cost for the federally negotiated IDC rate are as follows: equipment, capital expenditures, charges for patient care and tuition remission, rental costs, scholarships, and fellowships as well as subgrants/subcontracts shall be excluded from the modified total direct costs (from OMB Circular A-21).</td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>Name of employee that is tied to EmplID. (This is the primary name—not preferred.)</td>
</tr>
<tr>
<td><strong>Non-Competitive Renewal</strong></td>
<td>For multi-year projects, sponsors may require annual applications for continued funding. These applications do not compete for funds.</td>
</tr>
<tr>
<td><strong>Notice of Grant Award (NOGA)</strong></td>
<td>A document that provides information regarding the award’s important terms and conditions. It should be referred to by PI’s and departments to provide guidance in managing the project.</td>
</tr>
<tr>
<td><strong>Nonsponsored Funds</strong></td>
<td>Funds which are not administered by SPA, but either can 1) be used by the University at its own discretion because there are no external restrictions, or 2) may be used only in accordance with the purpose established by the funding source.</td>
</tr>
<tr>
<td><strong>Operator Identification (OPRID)</strong></td>
<td>The x.500 username associated with the employee making a transaction in the Human Resources Management System. When a transaction is saved, the username is captured as a part of the transaction.</td>
</tr>
</tbody>
</table>
**Patent**
A grant of property by the United States government to the inventor giving the owner the right to exclude others from making, using, offering for sale, or selling the invention in the U.S. or importing it to the U.S.

**Pay Grp**
The Paygroup used in 9.2 represents the term of employment the employee is working under (e.g., P12 - 12 Month Appointment, P10 - 10 Month Appointment, or P09 - 9 Month Appointment). The Paygroup used in 8.9 represents this: if ‘PAY’ then this is a paid position. If ‘WOS’ then this is a without salary position.

**Position**
The six-digit system-assigned number for the position.

**Position Status**
This is the position status (POSN_STATUS) related to the position number. There are four values for Position Status: A=Approved; D=Denied; P=Proposed; R=Frozen.

**Position Title**
The position title entered in PeopleSoft which may or may not be the same as the job code description for this position.

**Pre-Award Account**
A sponsored financial account established to begin working on a project before the project start date.

**Pre-Award Costs**
Costs incurred prior to the start date of an award.

**Pre-Encumbrance**
Represents outstanding requisitions or purchase orders and other commitments for materials or services not yet received. This information is pulled from the Commitment Control ledger for business unit UMN01. It can be correlated to the data found in the PeopleSoft table PS_Ledger_KK.

**Principal Investigator**
The individual responsible for the proposal and sponsored project.

**Probation Period**
The date reflects the end of the probationary period for an employee, except for temporary no post positions.

**Program Code**
The program code associated with the transaction.

**Program ChartField**
Five characters, numeric or alphanumeric, required when Project is not used. Program describes the kind of activity. Most nonsponsored activities use the Program ChartField.

**Program Income**
Gross income earned by the recipient that is directly generated by a supported activity or earned as a result of the award.
Terminology (cont.)

**Project Costing Business Unit (PCBU)**

Five alpha characters, required when Project is used. PCBU identifies the type of business for a project: sponsored project, or other type of project approved for use in the Projects module. Examples for use of PCBU include sponsored projects and Construction in Progress (CIP).

**Project ChartField**

Eight numeric characters required on sponsored activity. Project represents a unique group of accounting transactions that are supported by the financial system Project Costing module. Only those activities managed in the Project Costing module use the Project ChartField. Each Project value has an attribute that identifies a Function code.

**Proposal**

A complete document that contains all the information necessary to describe proposed project plans, staff capabilities, and requested funds.

**Regular**

If an appointment is planned to continue for more than a three month period of time, the appointment is considered regular.

**Reports To**

The six-digit system-assigned number for the position's reports to.

**Reports To Title/Name**

The position title and name(s) of report to who supervises or has organizational management responsibility for the position. There may be one or multiple Reports To Names for a position.

**Resource Responsibility Center (RRC)**

Specify how the University's sources of funding should be summarized, or rolled up, for reporting purposes. RRC represents the reporting relationships within the University by specifying how the individual DeptIDs should be summarized into Resource Responsibility Centers (RRC).

**Sal Admin Plan**

A code representing the salary administration plan to which the job has been assigned. Typically the plan is the same as the one assigned to the job code of the person's job.

**Sponsor**

Individual or organization that provides funds to a project.

**Sponsored Project**

An externally funded activity that is governed by specific terms and conditions set by the sponsor. These typically require financial or technical reporting to the sponsor and are administered through Sponsored Projects Administration (SPA).

**Sponsored Projects Administration**

The administrative office responsible for helping University of Minnesota employees acquire and manage sponsored funding for
(SPA) research, training, and public service projects.

Source Module The module where the transaction originated.

Source Doc ID The original transaction number within the particular module.

Standard Hours The weekly standard of work hours assigned to an employee.

Std Hours Number of hours employee is assigned to work per week for the employee record. i.e., 100% = 40 hours.

Subcontract See “Consortium or Contractual Agreement.”

Supplemental Proposal A proposal requesting additional funds to complete an already approved project.

Temp If an appointment is planned to last less than a three month period of time, the appointment is considered temporary.

Total Direct Cost (TDC) All of the project’s direct costs.

Total Project Costs The total allowable direct and indirect costs of a project.

UM College The College code and description for the College assigned to a ZDeptID. College code consists of 4 alpha characters (e.g., TMED). Note that this appears in header.

Unallowable A cost that cannot be charged to a project per sponsor guidelines.

Union Code A grouping of employees used by Employee Benefits for benefit calculations. Used in conjunction with Employee Class.

Unit A generic term referring to a portion of a college, department, or campus. A unit may or may not be equal to a DeptID.

Unit Administrator An employee responsible for providing administrative support for one or more sponsored projects.

Unrestricted Funds Funds having no requirements or restrictions as to use. Grants, contracts, and cooperative agreements are considered to be restricted funds.
Terminology (cont.)

**Unsolicited Proposal**  Proposal submitted to a sponsor that is not in response to a RFP, RFA, or program announcement.

**Voluntary Cost Sharing**  Cost sharing that is not required by the sponsor, is stated on the Notice of Grant/Contract Award (NOGA), and although not reported to the sponsor, must be documented through established procedures.

**Voluntary Matching**  Matching that is not required by the sponsor, is stated on the Notice of Grant/Contract Award (NOGA), and although not reported to the sponsor, must be documented through established procedures.

**x.500 User ID**  Unique user name assigned to students, faculty, and staff at the University to use in accessing their centrally provided email accounts and other electronic resources.

**ZDeptID**  The ZDeptID code and description. A value that tracks seniority and tenure. One or many DeptIDs can be associated with a ZDeptID. ZDeptID code consists of 5 alpha-numeric values (e.g., Z0330).
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<tr>
<td>Access Request Form (ARF)</td>
</tr>
<tr>
<td>University Financial Helpline</td>
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<tr>
<td>Financial One Stop (Process Flow)</td>
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<tr>
<td>Policy Library</td>
</tr>
</tbody>
</table>

| Information Technology, Office of             |
| 612-301-4357 (1-HELP)                         |
| it.umn.edu                                   |

| University Financial Helpline                 |
| 612-624-1617                                  |
| finsys.umn.edu/units/helpline                 |

| U-Wide Libraries                              |
| policy.umn.edu                                |