



HRIS On - Demand Report Training

Starters and the Leavers Report

Forms: PA223

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Introduction

The Starters and leavers Report (PA223) is provided to assist in easily identifying employees that are hires, rehires or separations..

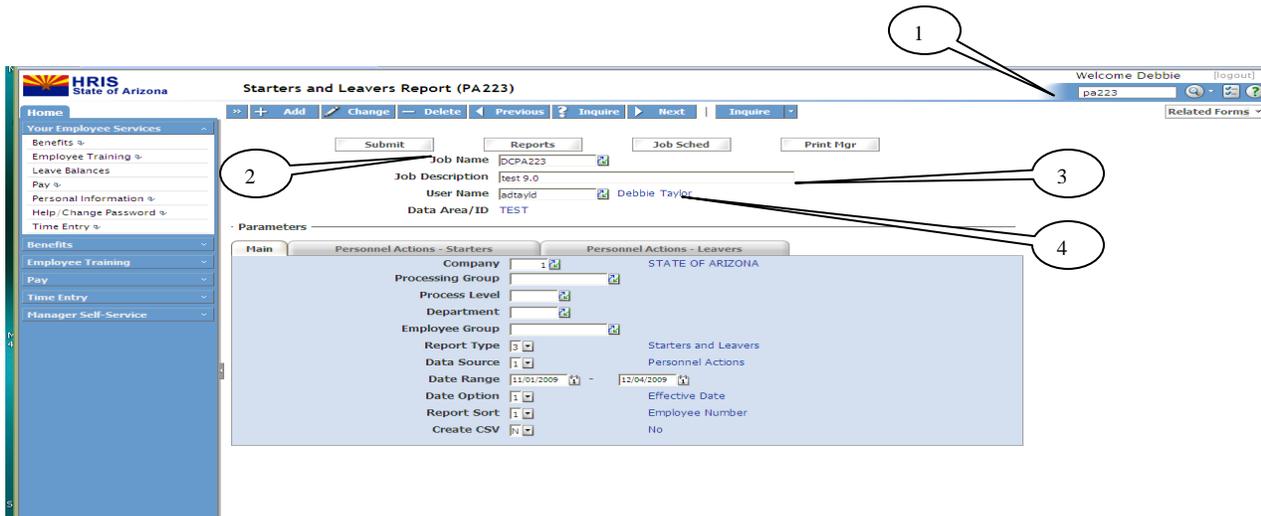
The Starters and Leavers report provides the following capabilities:

- Allows you to report on Hires, Rehires, Separations or any combination both Starters and Leavers.
- Limit reports on employees to a specific process level, department, or employee group.
- Employees can be selected on the basis of specified personnel action codes and/or action reasons or, based on their logged hire date / adjusted hire date or termination date.
- Use up to 10 Personnel Action Codes and / or Reasons to identify hires and separations.
- Employee reports can be selected either on the basis of the Effective date of the change or the System Date the employee record was actually updated. The System Date option is useful if you make many retroactively effective changes.
- Multiple report sorting options.
- Create a CSV file of employee detail for ad-hoc use by customers.

PA223 Starters & Leavers Report includes the following information.

- Employee Name and Employee Identification Number (EIN)
- Specific data such as Process Level, Department. Job Code and Class
- Categorized by Type (Starter/Leaver)
- Date options defined by parameters
- Parameters can be used to define data by Personnel Actions and Personnel Reason Codes
- The ability to create a CSV file.

PA223 – Creating Report Parameters



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type PA223 in the White Search Box. Press ENTER on the keyboard.	The Starters and Leavers Report (PA223) opens.	
2	Job Name Field	R	For a new report, type a unique name for the job. To use an existing report, you can select a previously defined job from the Drill Around. The jobs displayed are for the active user, displayed in the User Name field.	Job Name is established for the resulting report.	You can define different sets of parameters for the same report by using alternate job names. For example, you can inquire on an existing job name, change the parameters values, type in a new job name and use the CHANGE button. Each job defined for a particular user must have a unique name.
3	Job Description Field	O	Type a description of the job.	A Job Description will display.	The job description helps you identify a batch job by providing additional information about the job name.
4	User Name Field	R	No Action. System autofills.	The active user login displays.	To display, define, or manage jobs for another user, you must be a Superuser, Lawson Administrator, Security Officer or Class Supervisor with access to the product lines and system codes for all steps in a job.

Main

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	Company	R	Type 1 in Company Field	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
2	Processing Group Field	O	Leave Blank		Processing Groups are not used for reporting in HRIS
3	Process Level Field	O	Select Process Level from the drop down list	Report will generate data from the chosen Process Level	You can only access data from the Process levels that you have security access to.
4	Department Field	O	Select Department from the drop down list	Report will generate data from the chosen Department.	You can only access data from the Departments that you have security access to.
5	Employee Group Field	O	Select Employee Group from the drop down list	Report will generate data from the chosen Employee Group	
6	Report Type	R	Click to choose a specific type of report from the drop down list		<ul style="list-style-type: none"> Starters Leavers Starters and Leavers
7	Data Source	R	Click to choose the data source. You can choose from either Personnel Actions or specified dates.		<ul style="list-style-type: none"> Personnel Actions Hire; Adj. Hire; Term Date
8	Date Range	O	Enter a date range for your data, if applicable	Data will be pulled from the date given	

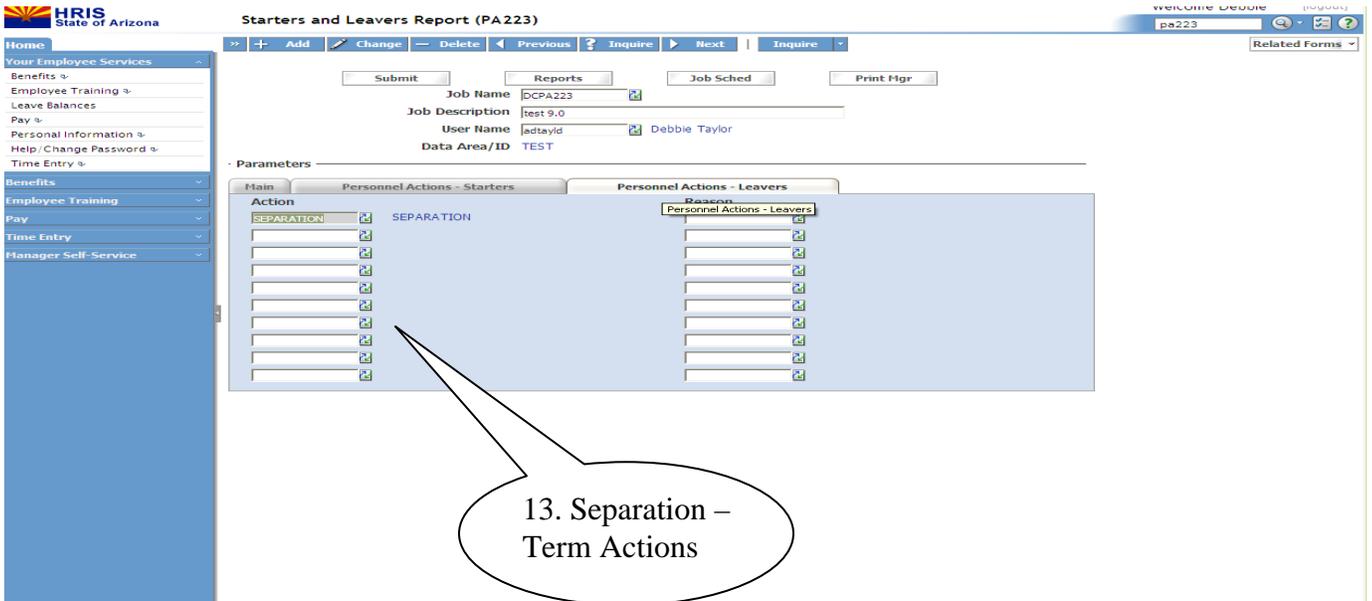
	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
9	Date Option	R	Choose Effective Date of System Date of Change from the drop down list.	Report data will be displayed by either Effective date or date posted to system.	<ul style="list-style-type: none"> Effective Date- effective date of the actions System Date of the change – date the data was keyed/processed in the system.
10	Report Sort	R	Choose sorting options for the report from the drop down list.	Report will be sorted in the appropriate manner.	
11	Create CSV	R	Y/N		Allows the creation of a CSV file to be used in Excel or Access.

Personnel Actions - Starters

The screenshot displays the HRIS 'Starters and Leavers Report (PA223)' interface. On the left is a navigation menu with options like 'Home', 'Benefits', 'Pay', and 'Time Entry'. The main area shows search criteria: Job Name (DCPA223), Job Description (Rest 9.0), User Name (edtayld), and Data Area/ID (TEST). Below this, there are two tabs: 'Personnel Actions - Starters' (selected) and 'Personnel Actions - Leavers'. The 'Starters' tab contains a table with columns for 'Action' and 'Reason'. A callout bubble points to the 'Action' column with the text '12. Hire Pers Actions'.

12. Click on the Personnel Actions tab. Choose the appropriate Personnel Action for the type of report data you want to access for Hires. APP-HIRE 1 and REHIRE will give you employee data for hires. Do not use HIRE-REHIR2 or HIRE-REHIR3 as this will duplicate your data. Personnel Action Reason Codes can also be specified.

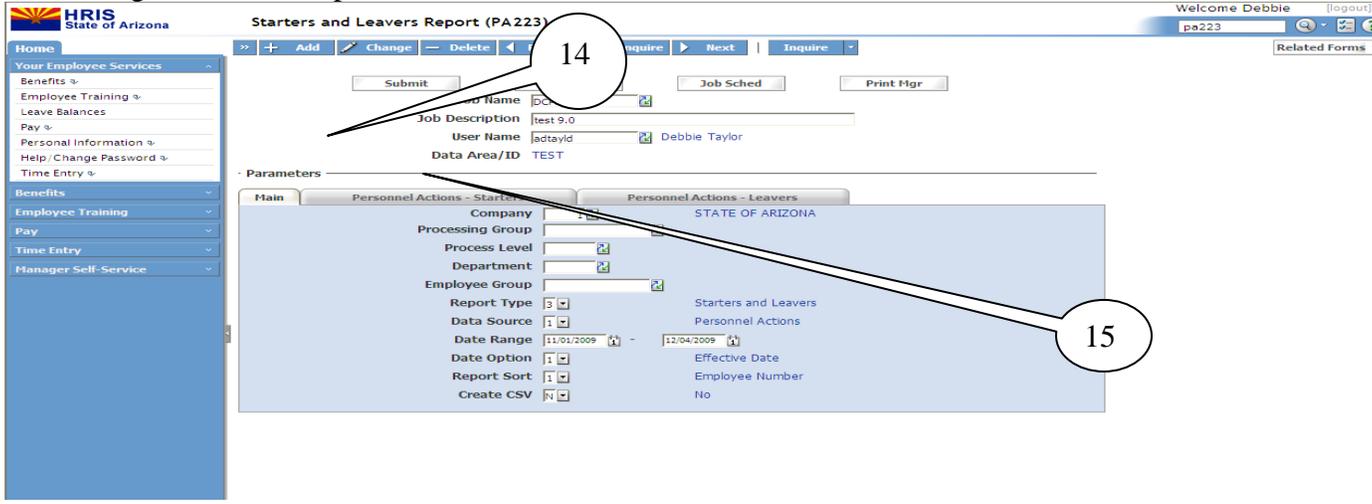
Personnel Actions - Leavers



13. Separation – Term Actions

13. Click on the Personnel Actions – Leavers Tab. Choose the appropriate Personnel Action for the type of report data you want to access for Separations. The SEPARATION action gives you employee data for terminations. Do not use INTRAGYTFR (Inter-Agency Transfers) as this is not used to terminate employees. Personnel Action Reason Codes can also be specified.

Submitting the PA223 Report



HRIS State of Arizona

Starters and Leavers Report (PA223)

Home | Add | Change | Delete | Previous | Inquire | Next | Inquire

Submit | Reports | Job Sched | Print Mgr

Job Name: DCPA223
 Job Description: test 9.0
 User Name: adtayid (Debbie Taylor)
 Data Area/ID: TEST

Parameters

Main | Personnel Actions - Starters | Personnel Actions - Leavers

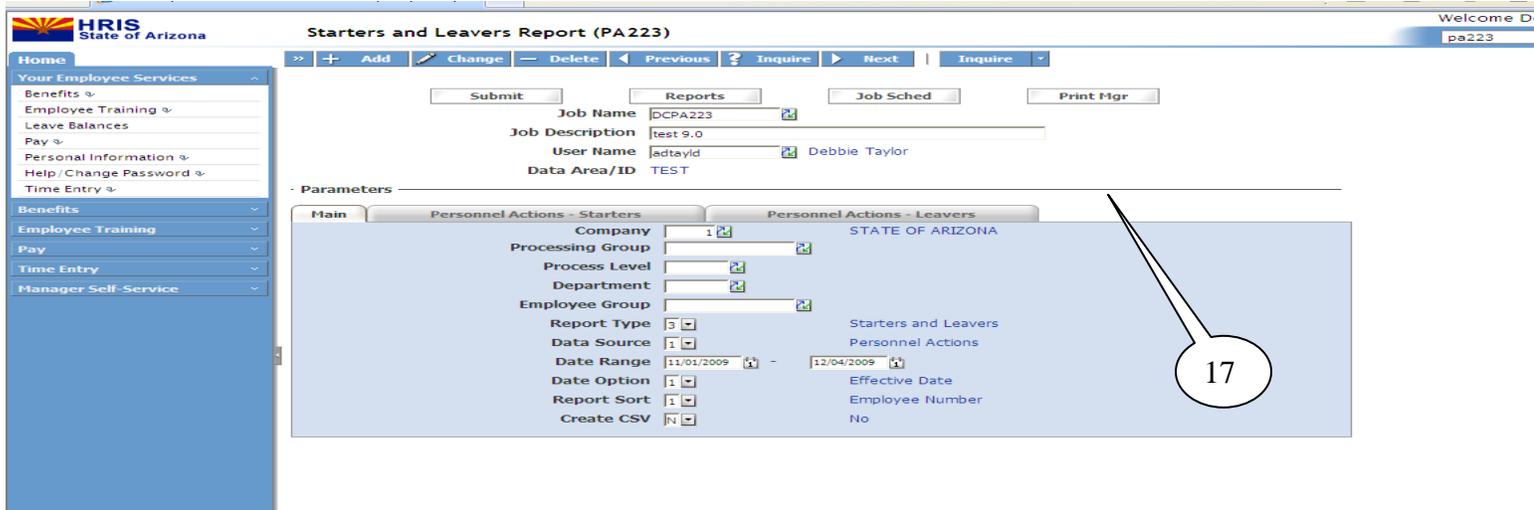
Company: http://hs-lsf9.azdoa.gov/lawson/portal/reports/jobs

Job Name: DCPA223
 User Name: adtayid
 Job Queue: [dropdown]
 Start Date: [calendar]
 Start Time: [time] (hh:mm)

Submit | Cancel

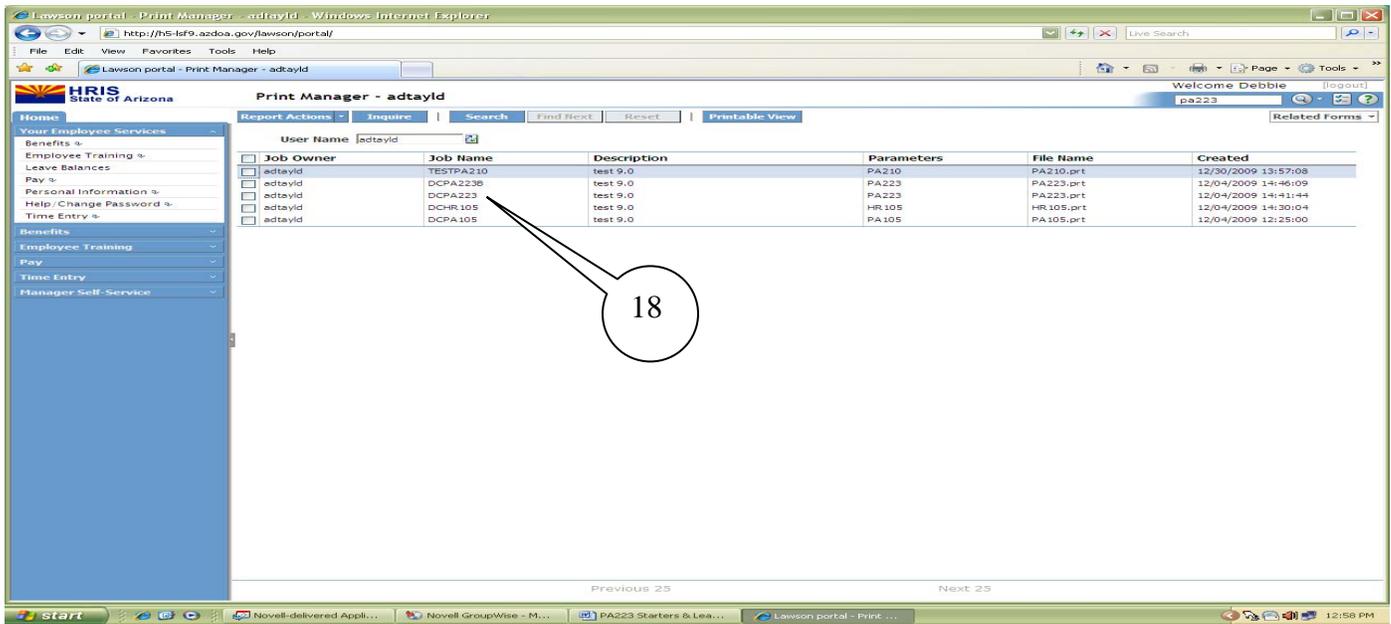
http://hs-lsf9.azdoa.gov | Internet

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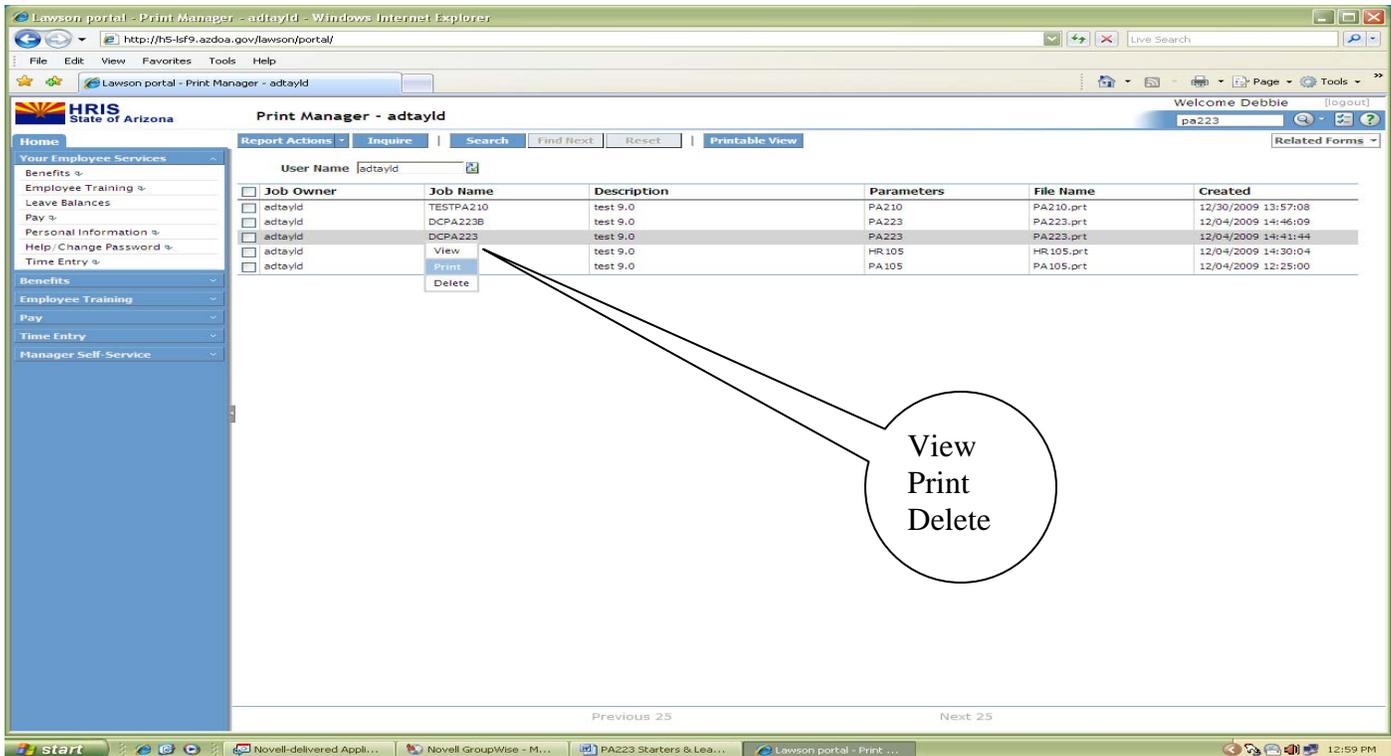


	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
14	Add/Change Button	R	Click ADD button for a new report. Click CHANGE button for an existing report that has been revised.	Message will say, "Job Added."	Add/Change Button
15	Submit First Button	R	Click on Submit button.	Submit Job--Webpage dialog box appears.	Submit First Button
16	Submit Second Button	R	Click on Submit button.	Message will say, "Job Has Been Submitted."	Submit Second Button
17	Print Manager Button	R	Click on Print Manager button.	Will open Print Manager screen.	Print Manager Button

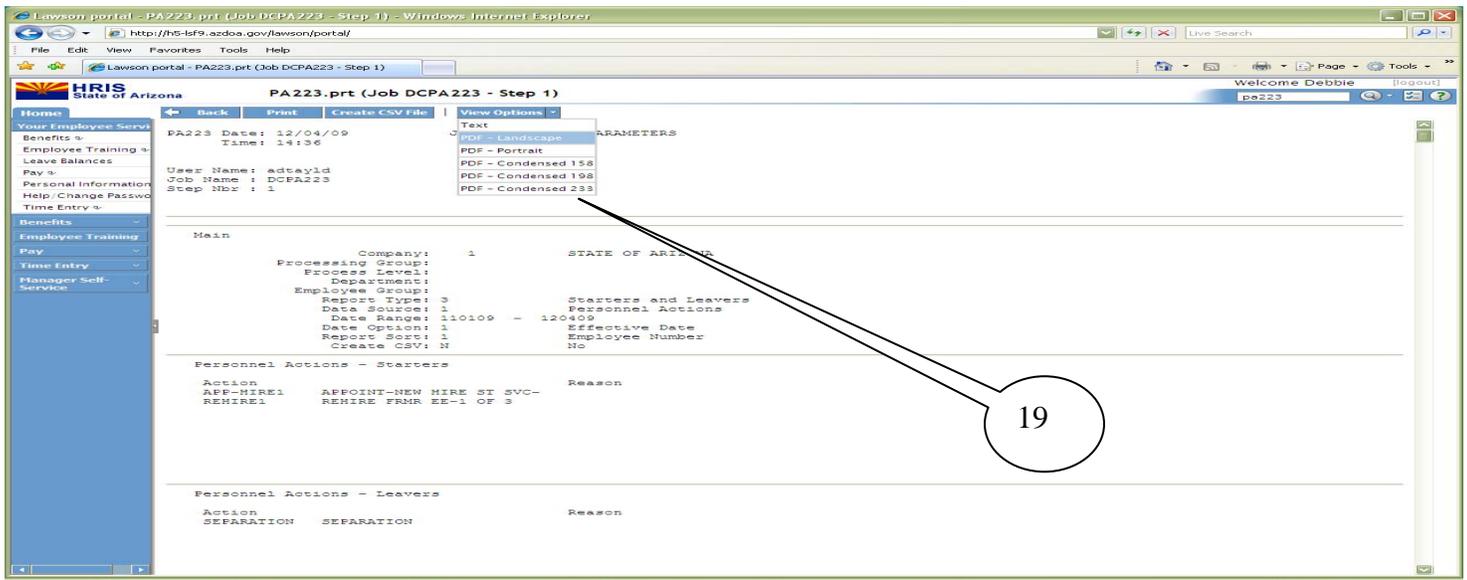
PRINT MANAGER – Opening a Report



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
18	Job Name	R	Right click the Job Name of the report you wish to print.	A drop down menu will give you the option to View, Print, or Delete.	Clicking View will allow you to view the report on screen prior to printing. Clicking Print will open printing options.



View and Print Options



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
19	View Options	O	Click View Options Select the print format from the drop down	Will open up a drop down box with several format options for viewing or printing. Will display report in format chosen.	View Options are: Text PDF – Portrait PDF – Landscape PDF – Condensed 158 PDF – Condensed 198 PDF – Condensed 233
20	Print button	R	Click the Print button Select the print options from the drop down. Click Print.	Will open up a drop down box with several format options for printing.	Choose the appropriate printer for your area.

