Discoverer Viewer – HR/Payroll Reports User’s Guide

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Welcome to the Discoverer Viewer

Welcome to the Discoverer Viewer HR/Payroll Reports User’s Guide. This guide is designed to provide you with the information you need to successfully navigate and use HR and Payroll queries and reports using the Discoverer Viewer tool and includes the following topics:

- Accessing Discoverer Viewer
- Payroll Reports
- Running Reports
- Downloading Reports to Excel

Who Do I Contact For Help?

For assistance with the data displayed Discoverer Viewer, contact the applicable functional area. For technical assistance, contact the Office of Information Technology, 359-6690.

Banner and the Discoverer Viewer Tool

Behind the scenes in Banner an Operational Data Storage (ODS) data base houses Banner data. The Discoverer Viewer tool sits on top of the ODS and is used to easily query and access information and data. Note: Data queried in Discoverer Viewer is updated from the ODS nightly; thus data is 24 hours old.

Requesting Access

To obtain Discoverer Viewer access, complete an access authorization form located at the link listed. Complete the HR/Payroll section of the ODS Access Request form.

http://access.ewu.edu/Academic-Advising/FacultyStaff-Advisor-Support/EWU-Student-Information-Systems-Access/Oracle-Discoverer-Viewer.xml

Additionally Banner INB Finance access may be required for other reports. Visit the Banner Help web site for Finance access information and the access request form.

http://access.ewu.edu/OIT/Services/IT-Training/Banner-Help.xml

Important Note: If you currently do not have Banner INB (Banner Finance, Banner Student) access you will be provided with a user name and temporary password (via email) by the Security Administrator when your Discoverer Viewer access is granted. Banner INB and Discoverer Viewer share the same user names and passwords. It will be necessary to log into
Banner INB with your temporary password and change it before you log into Discoverer Viewer for the first time. Instructions are listed below.

**Banner Password Policy**
The following are Banner password requirements:

- Access is locked after three failed login attempts. The system automatically unlocks after 30 minutes.
- Passwords expire after 120 days.
- The last 20 passwords used must be unique.
- Passwords cannot be reused within 90 days.
- Passwords must be at least eight characters long.
- Passwords must contain at least one numeric digit.
- Passwords must contain at least one of the following special characters: 
  ! % * + - / : ? _ Only these special characters may be used (others are not allowed).
- Characters cannot repeat more than two times (for example, "baadpwd123_" is not allowed, but "baadpwd123_" is allowed).

**Changing Banner Passwords**
The following provides instructions on changing your Banner password.

1. Launch Microsoft Internet Explorer.
   - For PCs Internet Explorer is the supported web browser.
   - For Macs use Safari or Mozilla Firefox web browsers.
2. Access the Banner web page at: [http://web.ewu.edu/banner/secure/links/](http://web.ewu.edu/banner/secure/links/)
3. Select *Banner INB (PROD).*

4. Enter your campus user name in the **Username** field (typically your first initial and last name; for example “pjohnson”).

5. Enter your temporary password in the **Password** field and click on the **Connect** button.
If you do not know your Banner password, contact the Help Desk at 359-2247.

6. From the Main Menu, click the **Change Banner Password** link.

7. The **Oracle Password Change (GUAPSWD)** form opens.
8. In the **Oracle Password** field, type in your current/temporary password.
   - The **Database** field is not used.

9. In the **New Oracle Password** field, enter your new password.

10. In the **Verify Password** field, re-enter your new password.

11. Click the **Save** icon to save the new password and return to the Main Menu.
Logging Into Discoverer Viewer
The following provides instructions on accessing Discoverer Viewer.

1. Launch Microsoft Internet Explorer.
   - For PCs Internet Explorer is the supported web browser.
   - For Macs use Safari or Mozilla Firefox web browsers.

2. Access Discoverer Viewer from the Banner Login web page
   [http://web.ewu.edu/banner/secure/links/](http://web.ewu.edu/banner/secure/links/).

2. Select the Oracle Discoverer Viewer (ODSP) ODSEUL link to access the Oracle Discoverer login page.
3. Enter the following:

- **User Name** – User name is your first initial followed by your last name (for example, dmontgomery for Denise Montgomery). User name is the same as your Banner INB user name.

- **Password** – Enter your Banner INB password. If the password is not known contact the Service Desk at 359-2247.

4. Click the keyboard **Enter** key or **Go** button.

5. The **Worksheet List** page displays. Reports are listed by name in the **Name** column.
Discoverer Viewer Reports

With the implementation of Banner Human Resources/Payroll, various payroll transactions are no longer visible in Banner INB Finance. As a result, the following reports are available using Discoverer Viewer. Additionally, new leave balance and position reports were added. These reports are used primarily by supervisors and budget and finance managers. Additional reports may be added in the future.

- **PHRLVBAL** – Leave Balance. This report provides employees annual beginning leave balance, annual ending balance (year-to-date), monthly time accrued and monthly time taken for all leave reporting codes (for example, sick, vacation, personal holiday, etc.). This report has two sections or worksheets:
  - **Leave Balances** - This worksheet provides employees leave balances.
  - **Leave Definitions** - This worksheet provides a definition of leave codes.

- **FPAORGDA** – Payroll Organization Detail Activity. This report has three sections or worksheets:
  - **Salary Transactions** – This worksheet provides employees earnings, and other salary transactions for a specified time period by organization, fund and account.
  - **Benefit Transactions** – The worksheet provides employer paid benefit transactions per employee for a specified time period by organization, fund and
account.

- **Earning Definition** – This worksheet provides a definition of earnings codes.

- **PBUPSNDL** – Position Detail Listing. Banner Finance security access is required to access this report. This report has two sections or worksheets:
  
  - **Single Positions** – This worksheet provides budgeted salary and benefit amounts, per position, by organization, index, and employee for positions C, E, F.
  
  - **Pooled Positions** – This worksheet provides budgeted salary and benefit amounts, per position, by organization, index, and employee for positions D, G, Q, X.

**Note:** EWU position descriptions are located at:
http://access.ewu.edu/Documents/Budget/Position%20Number%20Descriptions%20for%20Units.pdf

For additional information on the Finance data refer to the *Banner Finance 204 – Reports and Queries User’s Guide*. The guide is located on the Banner Help site at:

http://access.ewu.edu/OIT/Services/IT-Training/Banner-Help.xml
Discoverer Viewer Functionality

The following section discusses some of the functionality of Discoverer Viewer.

- **Parameters** – Parameters or data must be entered for some queries. Parameters tell the system what data is being requested. After selecting a report if parameters are required the **Parameters Needed** page displays. Parameters may be optional or required. Required parameter fields are indicated by a red asterisk. If an invalid parameter value is entered, or a required field is missed, an error message may display indicating the field requiring correction. Once all parameters are entered, the **Go** button ( ) must be selected to run the query (do not use the keyboard **Enter** key).

- **Query Running Time** – Once parameters are entered and submitted the **Query Progress** page displays. This page tracks the query running time and also allows the query to be cancelled. **Note**: Query running times can vary greatly. Queries with large quantities of data may require more than five minutes to process. If the query is running for an extended period of time and does not return the report, use the **Cancel** icon to cancel.
• **No Data Report Data Returned** – There are several reasons a report returns with no data; parameters may have been entered incorrectly, or the user does not have the appropriate security access to access the report data. Before contacting technical support to determine the appropriate security access needed for the requested report, confirm that the all parameters have been entered correctly. Reenter the parameters and resubmit the query if applicable.

• **Page Items** – Reports have **Page Items** displayed above the report data. Page items vary depending on the specific report. Use the drop-down arrows to view the options available.

• **Scroll Bars** – Depending on the amount of data returned and the amount of data displayed, scroll bars (vertical and horizontal) may be used to view additional data on the report.
- **Multiple Worksheets** – Some reports contain multiple worksheets (similar to Excel work sheets). Worksheets display on both the **Worksheet List** page and when the query is run. To access the desired worksheet, click on the desired link in the **Worksheets** section of the page. The worksheet will return with the same parameters previously entered, however they may be changed before clicking **Go**.

- **Breadcrumbs** – Breadcrumbs are a navigation tool that displays the pages previously accessed and provides a link back to that page or report.
Accessing Reports
The following provides instructions on accessing HR/Payroll reports.

**PHRLVBAL – Leave Balance**

1. From the Worksheet List page, click on the red pointer icon next to the report name (PHRLVBAL – Leave Balance) to display applicable report tabs (*Leave Balance*, *Leave Definitions*).

2. Select *Leave Balance*. The Parameters Needed page displays. Enter your EWU ID in the Supervisor’s employee ID field and click the Go button.
   - Only individuals with applicable security access may view this report.
3. The **Query Progress** page displays. This page displays the time it takes to execute the query. If the query is taking too long to execute, click the **Cancel** button.

4. The **Leave Balance** report data displays.

5. To view different months leave data, click the **Month** drop down list in the **Page Items** and select the desired month.
6. To view **Leave Definitions** from the open **Leave Balance** report, click the **Leave Definitions** link in Worksheets window. Click the **Go** button to execute.

- The **Query Progress** page displays.

7. The **Leave Definitions** report data displays. Note: **SCKN** represents shared leave.
FPAORGDA – Payroll Organization Detail Activity

1. From the Worksheet List page, click on the red pointer icon next to the report name (FPAORGDA – Payroll Organization Detail Activity) to display applicable report tabs (Salary Transactions, Benefit Transactions).

2. Select Salary Transactions. The Parameters Needed page displays.
   - Only individuals with applicable security access may view this report.

3. Enter the applicable values in the Parameter Needed section of the form and click the Go button.
   - Beginning and ending dates are required as well as a beginning and ending organization code.
4. The **Query Progress** page displays. This page displays the time it takes to execute the query. If the query is taking too long to execute, click the **Cancel** button.

5. The salary transactions report data displays.
6. To view **Benefit Transactions** from the open **Salary Transactions** report, click the **Benefit Transactions** link in **Worksheets** window. Click the **Go** button.

   - The report will run with the same parameters entered for salary transactions. If desired, the parameters may be changed before selecting the **Go** button.

7. The **Benefits Transaction** report data displays.
PBUPSNDL – Position Detail Listing

1. From the Worksheet List page, click on the red pointer icon next to the report name (PBUPSNDL – Position Detail Listing) to display applicable report tabs (Salary Positions, Pooled Positions).


3. Enter the applicable values in the Parameter Values section of the page and click the Go button.
   - Enter the 5-digit organization code rather than the organization level parameters.
4. The **Query Progress** page displays. This page displays the time it takes to execute the query. If the query is taking too long to execute, click the **Cancel** button.

5. The single positions report data displays.
6. To view **Pooled Positions** data from the open **Single Positions** report, click the **Pooled Transactions** link in **Worksheets** window. Click the **Go** button to execute.

   - The report will run with the same parameters entered for salary transactions. If desired, the parameters may be changed before selecting the **Go** button.

7. The **Pooled Positions** report data displays using the same parameter values selected for salary transactions.
Downloading and Printing Report Data

All reports displayed have an Actions window on the page. This window offers options to rerun the displayed query, print the report, or download the report to Excel.

Printable Page

This option allows the report to be displayed in a print output format.

1. From the desired report, select the Printable Page option in the Actions list.

2. The Printable Page Options page displays. Select the Printable PDF option.
3. The **PDF Process** page displays. If the PDF process takes too long, use the **Cancel** option to cancel the process.

4. When the PDF process completes, the **PDF Ready** page displays. Select the **Click to view or save** link to download the PDF.
5. To save the PDF to the desktop or computer drive after it is downloaded, click the **File** menu bar option in the browser window.

- Select **Save as** from the drop-down list.

![File menu](image)

6. A **Save as** dialog box displays. Enter the following then click **Save**.

- From the **Save In** field, select the desired save location (for example; My Documents)
- In the **File name** field enter the desired file name (for example “Single Positions”).

![Save as dialog box](image)
Export
This option allows the report to be exported to Excel;

1. From the desired report, select the Export option in the Actions list.

2. The Choose export type page displays. From the drop-down list select the Microsoft Excel Workbook option.
3. Click the **Export** button.

4. When the exported report is ready, click the **Click to view or save** button.

7. To save the Excel file to the desktop or computer drive after it is downloaded, click the **File** menu bar option in the browser window.
   - Select **Save as** from the drop-down list, then **Open** in the **File Download** dialog box.

8. A **Save as** dialog box displays. Enter the following then click **Save**.
- From the **Save In** field, select the desired save location (for example; My Documents)

- In the **File name** field enter the desired file name (for example “Single Positions”).