

Payroll Information Extract (PIE)
Payroll Data Extract
HR Deducting Departments

The Payroll Information Extract (PIE) was designed to provide organizations the ability to access detailed payroll information. The user submits the parameters for the report; the information is extracted and the report sent in an excel spreadsheet. The requestor receives an email notice when the report has been generated. The report may be accessed by selecting the correct notification in the requestor's worklist.

UAB HR Deducting → Payroll Information Extract (PIE)

The screenshot shows a software window titled "Payroll Information Extraction". The interface is organized into several sections:

- Data Type / Date Range:** This section contains three sub-sections:
 - Data:** Radio buttons for "Payroll", "Detail", "Person", and "Summary" (which is selected).
 - Type:** Radio buttons for "Calendar", "Date Paid", and "All" (which is selected). There are also radio buttons for "Q1", "Q2", "Q3", and "Q4".
 - Date:** A date range selector with "From:" and "To:" labels. The "From:" date is 2006 - JAN - 01 and the "To:" date is 2006 - DEC - 31.
- Main Criteria:** A section with several text input fields:
 - Name: []
 - Organization: []
 - Job: []
 - Payroll Type: []
 - Element Set: **UAB PIE HR Deducting Elements**
 - Asmt Category: []
 - Element: []
- Account Criteria:** A section with a "Type" dropdown menu and two rows of date input fields labeled "From" and "To".

At the bottom of the window, there are three buttons: "Clear", "Submit", and "Close".

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The extract provides specific information as outlined below:

Detail Extract	Person Summary Extract	Element Summary Extract
Full Name	Full Name	
Employee Number	Employee Number	
Assignment Number	Assignment Number	
Primary Flag	Primary Flag	
Employment Category	Employment Category	
Payroll Name	Payroll Name	
Date Paid		
Date Earned		
Period Name		
Pay Period Start Date		
Pay Period End Date		
Assignment Organization	Assignment Organization	
Timekeeping Organization		
Assignment Organization Unit	Assignment Organization Unit	
Job	Job	
Position	Position	
Class Code	Class Code	
		Element Number
Element Name		Element Name
Reporting Name		Reporting Name
Element Classification		Element Classification
		Earnings Type
Pay Value	Total Pay Value	Total Pay Value
		Element Count
Tenure Status	Tenure Status	
Tenure Track Date	Tenure Track Date	
Tenure Award Date	Tenure Award Date	
Tenure Review Date	Tenure Review Date	
Special Tenure Circumstances	Special Tenure Circumstances	

The top portion, **DATA TYPE / DATE RANGE**, of the form is used to establish the type of data and date ranges desired by the requestor.

Data Type / Date Range

<p style="text-align: center;">Data</p> <p><input type="radio"/> Payroll</p> <p><input type="radio"/> Detail <input checked="" type="radio"/> Summary</p> <p><input type="radio"/> Person <input type="radio"/> Element</p>	<p style="text-align: center;">Type</p> <p><input type="radio"/> Calendar</p> <p><input type="radio"/> Date Paid</p> <p><input type="radio"/> All <input checked="" type="radio"/> Q1 <input type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4</p>	<p style="text-align: center;">Date</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: right; padding-right: 5px;">Year</td> <td style="text-align: center; padding: 0 5px;">-</td> <td style="text-align: right; padding-right: 5px;">Month</td> <td style="text-align: center; padding: 0 5px;">-</td> <td style="text-align: right; padding-right: 5px;">Day</td> </tr> <tr> <td style="text-align: right;">From:</td> <td style="text-align: center;">2006</td> <td style="text-align: center;">-</td> <td style="text-align: center;">JAN</td> <td style="text-align: center;">-</td> <td style="text-align: center;">01</td> </tr> <tr> <td style="text-align: right;">To:</td> <td style="text-align: center;">2006</td> <td style="text-align: center;">-</td> <td style="text-align: center;">DEC</td> <td style="text-align: center;">-</td> <td style="text-align: center;">31</td> </tr> </table>	Year	-	Month	-	Day	From:	2006	-	JAN	-	01	To:	2006	-	DEC	-	31
Year	-	Month	-	Day															
From:	2006	-	JAN	-	01														
To:	2006	-	DEC	-	31														

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In the **DATA** field, click the **radio button** next to Payroll. The requestor may elect to receive detail or summary information on the report. Select the **radio button** next to the desired criteria. Selecting the **SUMMARY** option activates the **PERSON** and **ELEMENT** buttons.

Payroll > Detail

Data	
<input type="radio"/> Payroll	
<input type="radio"/> Detail	<input checked="" type="radio"/> Summary
<input type="radio"/> Person	<input type="radio"/> Element

Payroll > Summary > Person/Element

Data	
<input type="radio"/> Payroll	
<input checked="" type="radio"/> Detail	<input type="radio"/> Summary
<input type="radio"/> Person	<input checked="" type="radio"/> Element

The requestor must determine the time period to select in the **TYPE** field. The options are **ALL** (four quarters per year), **Q1** (1st quarter), **Q2** (2nd quarter), **Q3** (3rd quarter), or **Q4** (4th quarter.)

Type	
<input type="radio"/> Calendar	
<input type="radio"/> Date Paid	
<input type="radio"/> All	<input checked="" type="radio"/> Q1 <input type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4

The requestor must consider the **TYPE** and **DATE** fields collectively. **The requestor may retrieve data from any 12-month period.** Dependent on the time period selected, the **DATE** field will enable the requestor to input the extract parameters.

Calendar > Date Paid > All

Type		Date		
<input type="radio"/> Calendar		Year	Month	Day
<input type="radio"/> Date Paid		From: 2006	- JAN	- 01
<input type="radio"/> All	<input checked="" type="radio"/> Q1 <input type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4	To: 2006	- DEC	- 31

Calendar > Date Paid > Q1, Q2, Q3, Q4

Type		Date		
<input type="radio"/> Calendar		Year	Month	Day
<input type="radio"/> Date Paid		From: 2006	- APR	- 01
<input type="radio"/> All	<input checked="" type="radio"/> Q1 <input type="radio"/> Q2 <input type="radio"/> Q3 <input type="radio"/> Q4	To: 2006	- JUN	- 30

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The **MAIN CRITERIA** portion of the document is restricted according to the requestor's system security including the organization(s) and responsibilities. These restrictions are the same as those for **THE APPOINTMENT, CHANGE, AND TERMINATION (ACT)** document.

The requestor may define the extract criteria utilizing a single field or a combination of fields.

The screenshot shows a 'Main Criteria' form with the following fields:

- Name:
- Organization:
- Job:
- Payroll Type:
- Element Set: **UAB PIE HR Deducting Elements**
- Asmt Category:
- Element:

To select an employee by **NAME**, type the *individual's name* (Last Name, First Name) or type a *partial value* including the percent (%) sign and press the **Tab** key on the keyboard. A listing of available names will appear. Select the *appropriate person* and **double click** or select **OK**.

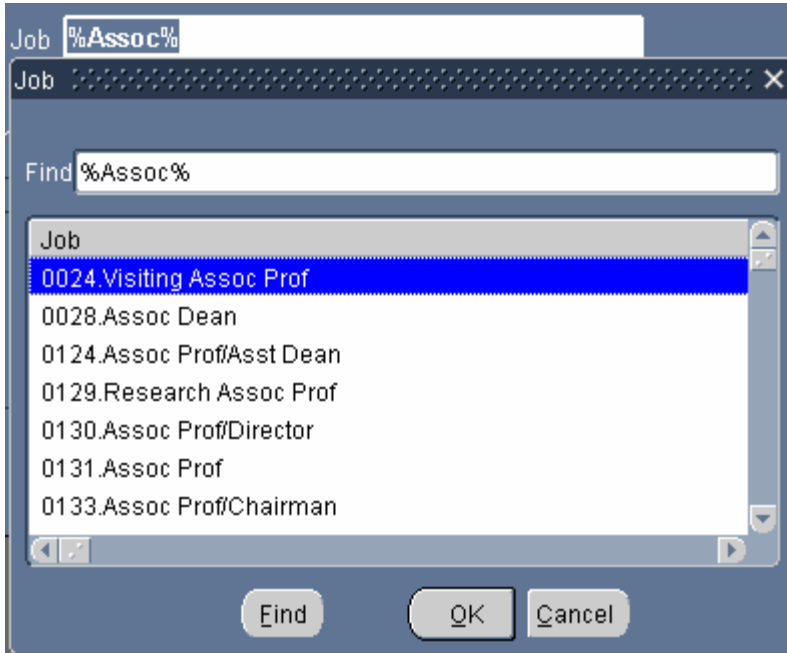
The screenshot shows the 'Main Criteria' form with the 'Name' field containing 'Mitchell, K'. A search popup window titled 'Full Name' is open, displaying a list of employees. The search criteria is 'Find %Mitchell, K%'. The list is as follows:

Full Name	Employee Number
Mitchell, Kathryn H	1009175
Mitchell, Keenya L	1022061
Mitchell, Kendrick T	1015515
Mitchell, Kevin B.	1038006
Mitchell, Kimberlee Stanton	1006305
Mitchell, Kimberly M	1015971
Mitchell, Kimberly M	1034484

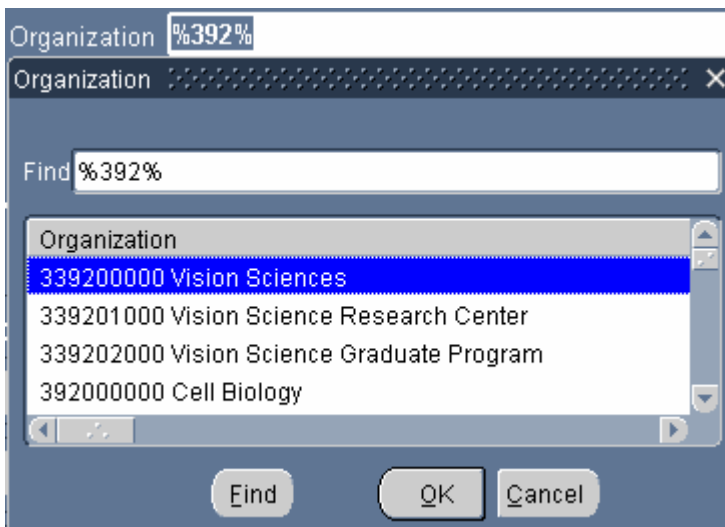
Buttons at the bottom of the popup: Find, OK, Cancel.

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To use the **JOB** number as a criteria, enter the *job number* or use the percent (%) sign and any applicable numbers or letters and press **tab**. All available listings will appear. Select the *appropriate job* and **double click** or select **OK**.

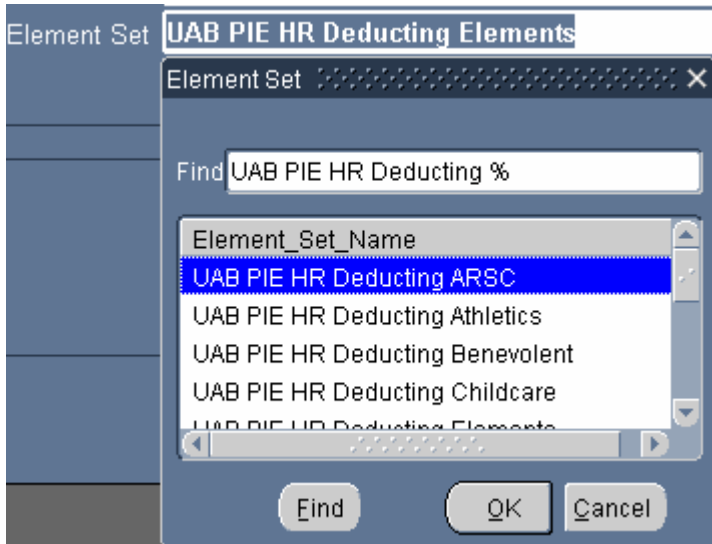


Extract criteria may also be filtered by **ORGANIZATION**. Leaving the organization field blank will extract all organizations to which the requestor has access. To select an organization, the requestor may use partial values (i.e. letters or numbers) and the percent (%) symbol. **Double click** the correct organization or **highlight** the selection and select **OK**.

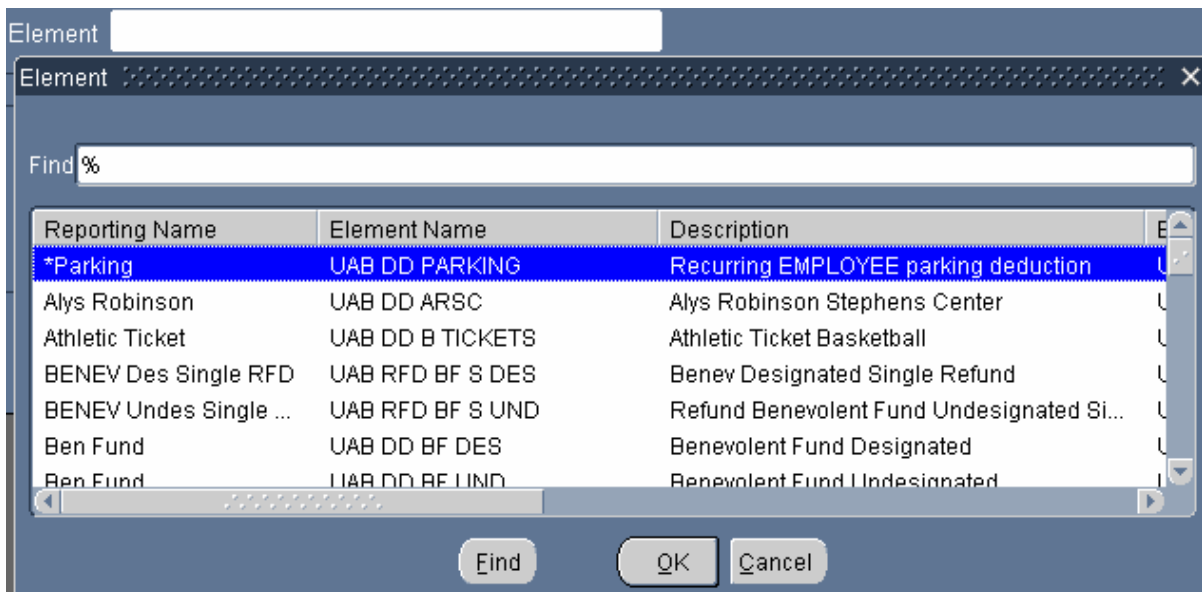


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Data may also be filtered according to the **ELEMENT SET**. The default, UAB PIE HR Deducting Elements, contains all deducting elements. To further define the element set, select the **LOV** and a listing of element categories will appear. Select the **element** and **double click** or select **OK**.

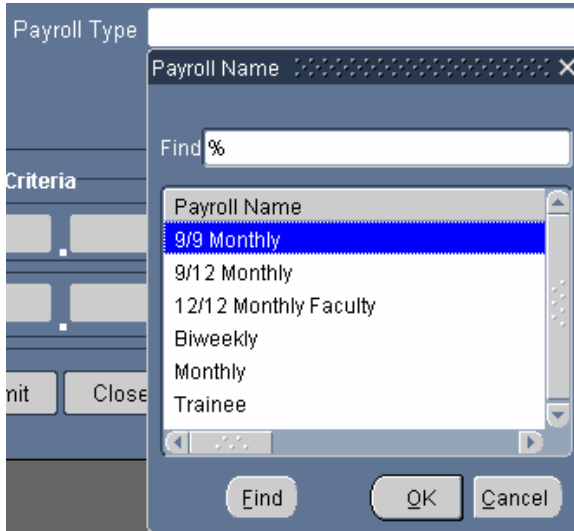


Using the **ELEMENT** criteria enables the requestor to view the specific elements that are associated with the element sets. Select the **LOV** and all elements pertaining to the defined element set will appear. Select the **element** and **double click** or select **OK**.

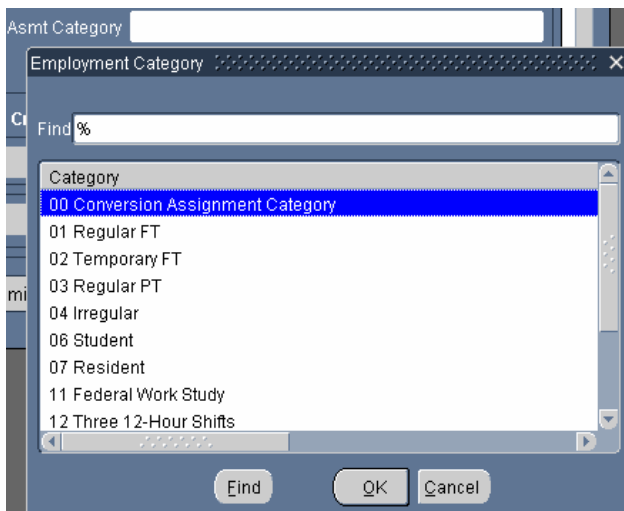


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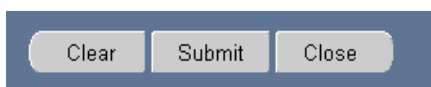
To request only individuals with a specific payroll, use the **PAYROLL TYPE** filter. Place the **cursor in the field** and an LOV will be activated. Click the **LOV** and all applicable payroll types will appear. Select the correct **payroll type** and **double click** or select **OK**.



Use the **ASSIGNMENT CATEGORY (ASMT CATEGORY)** filter to select only individuals in a specific assignment or employment group. Place the **cursor in the field** to activate the LOV. Click the **LOV** and all applicable data will appear. Highlight the correct **assignment category** and **double click** or select **OK**.

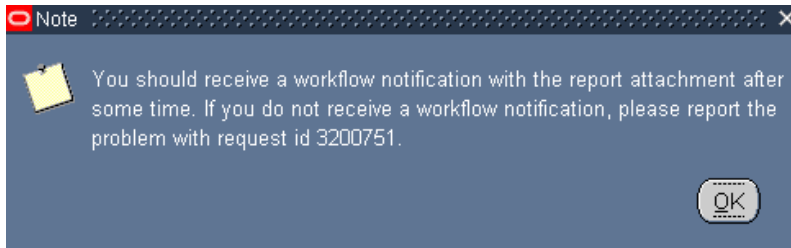


After selecting all extraction filters, click **Submit**.

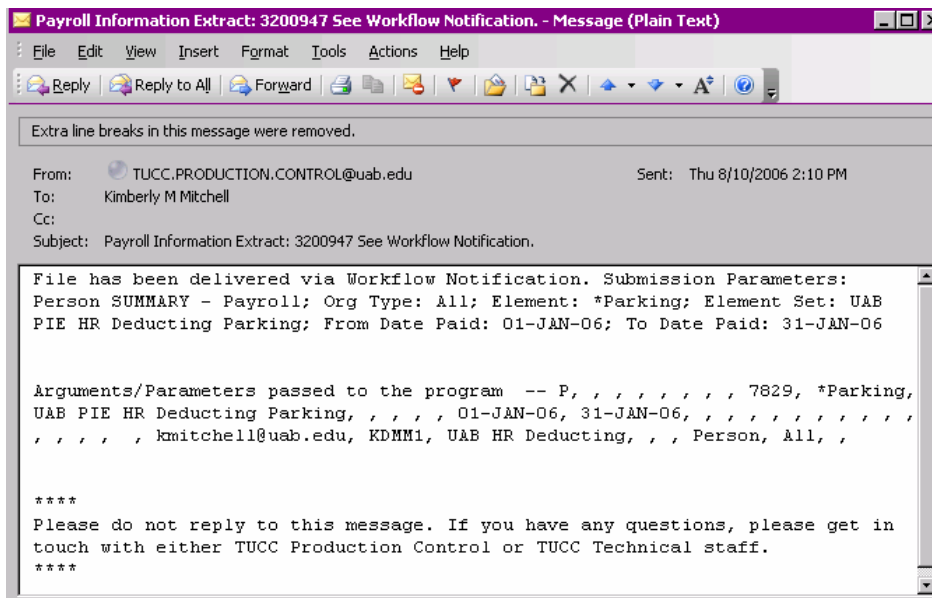


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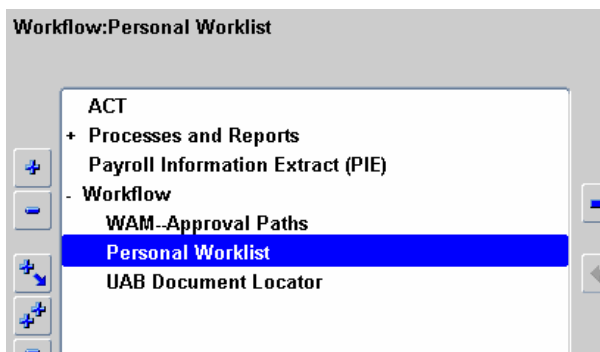
The **NOTE BOX** will inform the requestor that the report will be available as a workflow notification. A request id number will also be included should the requestor experience any problems accessing the extract.



The requestor will receive an email with instructions to access the report. The email will also contain the extract parameters of the report.



To access the notification containing the report, select the **Personal Worklist** menu item under the Workflow responsibility on the **PERSONAL HOME PAGE**.



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Click on the correct **notification** in the **WORKLIST**.

View <input type="text" value="Open Notifications"/> <input type="button" value="Go"/> <input type="button" value="Personalize"/>			
Select Notifications: <input type="button" value="Open"/> <input type="button" value="Reassign"/>			
Select All Select None			
Select From	Type	Subject	Sent
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	26-Jul-2006
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	10-Aug-2006
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	26-Jul-2006
<input type="checkbox"/> TIP Vacation Rules - Redirect or auto-respond to notifications.			

The notification will contain the extract parameters submitted by the requestor. Click the **view report** link on the **NOTIFICATION**. The requestor should pay particular attention to the note regarding access to the report. The statement reads as follows:

*****NOTE 1: For Security reasons this report will be viewable only once. i.e. once you have viewed the report, you will no longer be able to click on the URL. To retain the report click on File>Save and save to a local directory. Otherwise, to view it again, you will have to regenerate the request.**

ORACLE [Help](#) [Close Window](#)

Information
 This notification does not require a response.

Report Sent by UAB Notification Mailer

To **Mitchell, Kimberly M**
 Sent **10-Aug-2006 12:00:02**
 ID **4224457**
 Request #: 3200751: PIE Payroll Information Extract Submission Parameters: Element SUMMARY - Payroll; Org Type: All; Element: Ben Fund; Element Set: UAB PIE HR Deducting Elements; From Date Paid: 01-JAN-06; To Date Paid: 31-MAR-06

The report file can be accessed by clicking on the link below.

[View Report](#)

NOTE 1: For Security reasons this report will be viewable only once. i.e. once you have viewed the report, you will no longer be able to click on the URL. To retain the report click on File>Save and save to a local directory. Otherwise, to view it again, you will have to regenerate the request.

[Return to Worklist](#)

Display next notification after my response

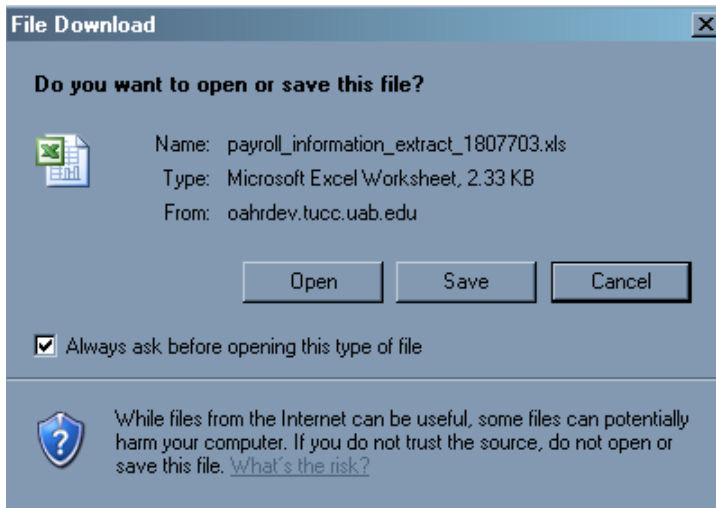
[Help](#) | [Close Window](#) [Privacy Statement](#)

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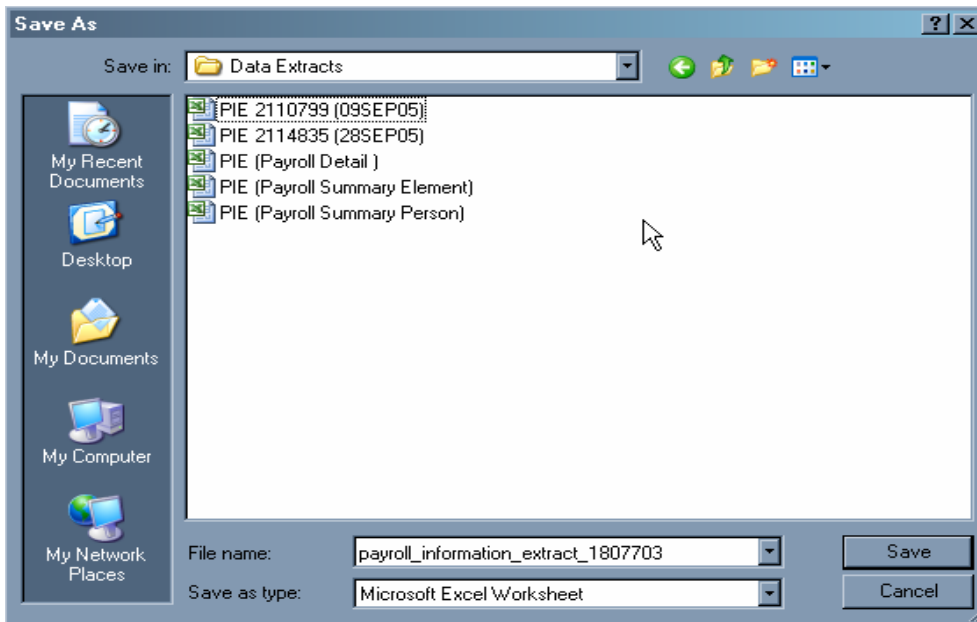
***It is possible to retrieve requests by selecting **View > Requests** on the task bar.

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The **FILE DOWNLOAD BOX** will appear. Select **Save**.

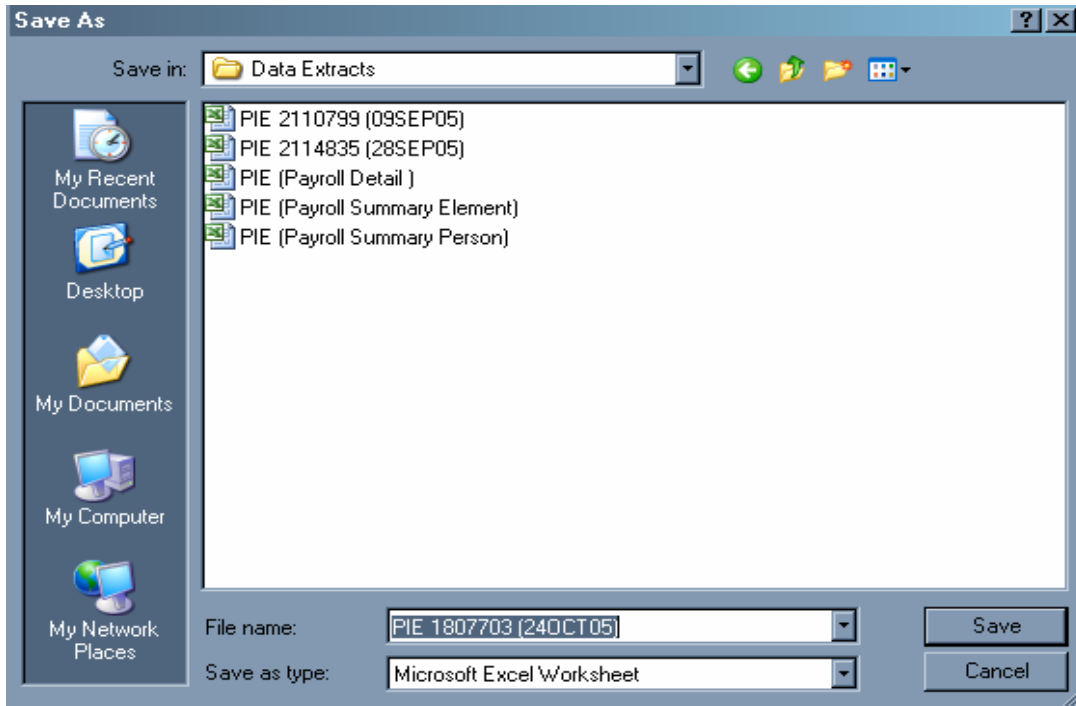


Selecting save will launch the **SAVE AS WINDOW**. The file will be authentically named using the identification number (i.e. payroll_information_extract_ *id number*.) The file will save as a Microsoft Excel Worksheet. The requestor should select the **appropriate file location**.

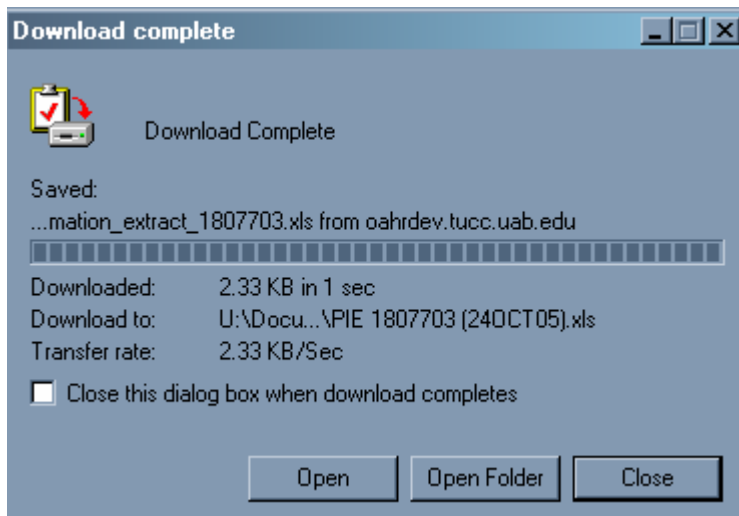


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Once the location has been selected, click **Save**. NOTE: If desired, the requestor may change the file name.



The **DOWNLOAD STATUS BOX** will appear indicating that the download has completed. Select **Open**.



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The spreadsheet will launch. **NOTE:** The extraction parameters are indicated on the first line of the spreadsheet.

	A	B	C	D	E
1	Submission Parameters: Person SUMMARY - Payroll; Org Type: All; Element: *Parking; Element Set: UAB PIE HR Deducting Park				
2	FULL_NAME	EMPLOYEE_NUMBER	ASSIGNMENT_NUMBER	PRIMARY_FLAG	EMPLOYMENT_CATEGORY
3	Anderson, John	1002356	1002356	Y	1 Biweekl
4	Burton, Joseph	1025637	1025637	Y	1 Monthly
5	Cooper, Hannah	1345876	1345876	Y	1 Monthly
6	Martin, DeeAnn	1785691	1785691	Y	1.12/12 M

The requestor may then manipulate the data as desired.