**WEB REPORTS V2 USERGUIDE**

**FOR FACULTY AND ADMIN USERS**

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Introduction

Aims

HR Web Reports have been simplified and the mandatory component can now be completed much more easily and quickly.

The changes to the reports have come about from the requirements of the University’s internal auditors.

The Salary Variance Report can be used to verify various pay adjustments have been correctly submitted to and actioned by HR. However the University’s internal auditors have stressed that the key value of the Web Reports is the protection against fraud, in the form of ‘ghost employees’ and to detect when departed staff have not been properly terminated.

For this reason, it is now only mandatory for business units to scrutinise the Staff List by BU Report each fortnight to check that those listed are legitimately on the payroll. It is a quick and easy process.

The Salary Variance Report will still be available, but it will no longer be mandatory to acknowledge you have checked the report.

Accessing the Application

The application can be accessed from HR Homepage: www.hr.uwa.edu.au. Select Web Reports V2 from the drop down box in HR Systems section.

Exiting the Application

To logout out of the Application click the logout link in the top right corner of the page
Business Unit Pay run Approval
Currently approval is only necessary for the Staff Paid by BU report. This report requires two levels of approval and must be completed for every pay period for each business unit. A notification and escalation process tracks the progress of this task.

Initial Approval (Level One)
In order to approve a Web Report for a pay period you need to have the Role "Approval Level 1" for that Business Unit.

Select a Business Unit and Pay run and click Go

A user with the role Approval Level 1 will see an Approval region on approvable reports. Users without won’t see this region
If a report for a BU and payrun has already been approved and can no longer be changed it will show in a read only state.

However if it is yet to approved by a Level 2 Approver you can update the Status and Comments fields and Save your changes.
Final Approval (Level Two)
In order to complete the final approval for a Web Report for a particular pay period you need to have the Role "Approval Level 2" for that Business Unit.

Level 2 Approval for a business unit and pay period is performed on the Pay Period page which can be access by clicking on the Pay Period Tab.

You must have Level 2 Approval in order to see the Approval section of the page

Firstly select the Business Unit and Pay Period date and click the Go button.

Approvals Status and Final Approval regions will be displayed

Shows Report Status and link to view the report for this BU and pay period
To action the final approval for all reports shown in the approval status list, select the appropriate item from the approval status drop down and enter a comment if necessary. Click Save to finish the approval or Cancel to discard your changes.

Once the final approval has been completed, the individual reports for this pay period and business unit can no longer have their approval modified.

Level 1 Approval Complete Notification
When a Level 1 Approver has changed the status of all the reports requiring approval for a Business Unit and pay period, level 1 approval is complete and a notification is sent to all Level 2 Approvers. Level 2 Approvers can then view the approval status and comments made by a Level 1 Approver before performing the second stage approval.

Approval not Complete Notification
If the reports requiring approval for a pay run have not been approved within 4 weeks, a notification is sent to ALL active Level 1 and Level 2 Approvers for that Business Unit. These notifications are recorded in the Web Reports database and can be viewed from Notification link within the Approval Report.

Approval not Complete Escalation
If the reports requiring approval for a payrun have not been approved within a further 2 weeks (6 weeks after the payrun), an escalation notification is sent to the Supervisor of the default Level 2 Approver employee or position. This notification informs the Supervisor of the Business Unit and pay period date to be followed up for approval.
Using the Web Reports Application

Navigating in the Application

When you enter the application, the Home screen will be displayed. From here you can navigate to other parts of the application. You can click on any of the Main Menu links or one of the Application Tabs.

- Your staff number appears at the top of the page
- Click on the Tabs to move to another area of the application

The screen below shows additional options for moving around the application.

- You can also use the “Breadcrumbs” to Navigate. Clicking on the Pay Period link will take you back to Pay Period Menu
- All report pages have a Go button which will refresh the results to pick up any changes to the Selection Criteria values
- Many of the screens have links in the report to drill down to see further data.
Using the Selection Criteria on Report Screens

The Selection Criteria allows you to find records using a number of filters.

Use the Drop Down Lists and other components to set the filter conditions you would like applied to the report.

Some reports will a large number of columns will have an additional checkbox in the Selection Criteria area. Ticket this checkbox on and off to display additional columns in the report.

Results

The results are shown in a table format below the Selection Criteria. Some column values are a hyperlink that will take you to detail screen with more information.
This link allows you to export the report results out in CSV format. CSV format can easily be opened in Excel.

Each report displays the number of rows.

If column sorting is in place, it is highlighted by a yellow arrow.

Sortable columns are identified and activated by the column header link.

**Pagination**

On reports where the number of rows is too large to show in one page, pagination links are shown on the right side at the top and bottom of the report.
Reports

Pay Period Reports

Staff paid by BU
Shows a list of all the staff that were paid by a Business Unit for each pay run. The list of selectable business units is based on the users privileges defined in the Maintain User Access. General employee, account and position information is shown as well as annual salary.

The data for the Staff paid by Business Unit is extracted with a Salary History Data Population. As this report has a large number of columns, some are hidden by default. A Show All Columns checkbox is provided to show all columns for more detailed analysis.

Salary History by Pay Type
Shows a summary of the payment amounts made to an employee for various Pay Types. It also includes a total of the payments for each employee. The report is restricted to a business unit and allows the user to select a From and To pay run with the result showing all payments in between.

Clicking on a particular pay type or total for an employee will show a detail report of the individual transactions
The below detail report shows when clicking on the Salary link. The back button returns the user to the Salary History by Pay Type page.

Salary History by Pay Date
Shows a summary of the payment amounts made to an employee for various pay runs. The report is restricted to a business unit and allows the user to select a From and To pay run with the result showing a sum of all payments for each pay run in between.

Clicking on a particular pay period end for an employee will show a detail report of the individual transactions

The back button returns the user to the Salary History by Pay Date page.

The above detail report shows when clicking on the pay period end date 1 June 2014 for 00078586. It shows a breakdown of the transaction for this pay period.
**Allowances**

Shows all the allowance paid to employees of the selected business unit for a pay period.

This report has no detailed page or links. The data for the Allowances report is extracted with a Salary History Data Population.
Comparison of Pays
Shows a breakdown of the pay by pay type for all employees within a business unit. Two columns show a comparison of the pay for the selected Pay Period Ending On and the pay period previous to that. Users with either Level 1 or Level 2 Approval permission for that business unit can leave comments against a detail row for an employee. These comments are copied over into the next pay run for reference.

A summary of the Totals for each employee is also shown.

A detail report is available as a drill down to view the transactions of each pay type for an employee.
Variance Transaction Details

Shows detailed pay transaction for a pay period. This report allows the standard filtering by business unit and pay period as well as account and Project/Grant. Due to the number of columns in the report, not all columns are shown by default. A Show All Columns checkbox exists to display further details.
Commitments by Pay Type Report
This report shows the payroll commitments for a budget year at the extraction date. Commitments are shown for a business unit and can be filtered on various Pay Types.

Clicking on a pay type amount for an employee will display a detailed report.

The data for the Commitments by Pay Type is extracted with a COMMITMENT Data Population.
Staff List by Location

This report shows the staff that are paid by a location at the selected date. Some columns are hidden by default and only displayed when the Show All Columns checkbox is ticked and the Go button clicked.