

# 6.14 (c) - How to Run CAT Reports – Missing from CAT Report

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## Purpose and Overview

This report allows users to identify new hires and ongoing staff who exist in HRS but were not included in the CAT at the time of data initialization. This report should be run after data initialization and regularly throughout the process until budget lock.

*PLEASE NOTE: This report includes many staff types we do not budget by person at UW-Madison. Specific instructions for how to exclude all non-relevant staff are included in the instructions below. This report serves as a notification of possible issues but not all data represent budget errors. This report will not be clear at the end of the budget process. A copy of the report should be sent to the Madison Budget Office during budget checkout with notes regarding all staff types normally included in the budget who remain on the Missing from CAT Report and the reason they were not added to the budget.*

## Process Inputs

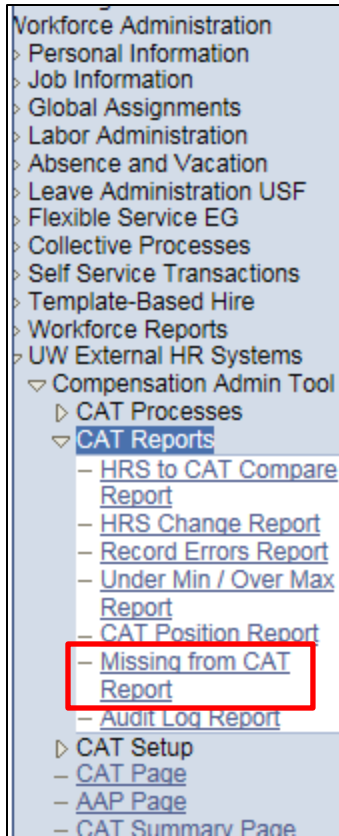
- Fiscal Year
- Business Unit
- Division (Optional)
- Department (Optional)
- Employee Class

## Process Outputs

- Excel document with all employee records that meet the run control criteria and have a missing from CAT error.

## Procedure Steps

1. Navigate to **Workforce Administration > UW External HR Systems > Compensation Admin Tool > CAT Reports > Missing from CAT Report.**



2. Click Search under the Find an Existing Value tab to select a previously created Run Control ID, or create a new Run Control ID by selecting **Add a New Value**. To create a new Run Control ID, assign a unique identifier as the Run Control ID (eg. initials\_date\_etc.) into the Run Control ID box and select **Add**.
3. *Note: Run Control ID sets the report parameters. Users can create one ID, and use it to process multiple reports/processes, or create a new ID for each report/process.*

### Missing from CAT Report

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**Run Control ID:**

[Find an Existing Value](#) | [Add a New Value](#)

1. Enter parameters to define criteria for the Missing from CAT Report.
  - a. Select the upcoming **Fiscal Year** used for CAT budgeting planning purposes. This field will default to the latest fiscal year setup in the CAT.
  - b. Select a **Business Unit**.
  - c. If desired, select a **Division**.
  - d. If desired, select a **Department**.
    - i. If available, the **Department** field will become editable when the user selects a Division from the search tool or enters one manually and presses the tab button out of the field.
  - e. Click **Select Values** in the employee class box. **You will need to exclude the following employee classes from the report: CL, ET2, OT1-OT6, SA1- SA7, SH.** The default is for all employee classes to be included
  - f. Click **Save** in the bottom left to save the parameters for the report.

Click **Run** in the top right to run the report.

Missing from CAT Report

**Run Control ID:** missing\_cat
Report Manager Process Monitor Run

Missing From CAT Report Run Parameters

**\*Fiscal Year**

**\*Business Unit**

**Division**

**Department**

Employee Class

**Employee Class - All Values:**

Select Values

Save
Notify

Add
Update/Display

1. User will be automatically directed to the Process Scheduler Request page. From this page, select **OK**.

**Process Scheduler Request**

User ID: 00699002                      Run Control ID: ABC01

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Server Name: ▼                      Run Date: 11/24/2015 [31]

Recurrence: ▼                      Run Time: 1:50:18PM                      [Reset to Current Date/Time](#)

Time Zone:  🔍

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Missing from CAT Report	UW_CAT_MSRPT	Application Engine	Web ▼	TXT ▼	<a href="#">Distribution</a>

[OK](#)   [Cancel](#)

- Note the Process Instance number under the Process Monitor link. This designates the specific instance of the report run.
- Click **Process Monitor** at the top right of the window.

**Missing from CAT Report**

Run Control ID: missing\_cat                      [Report Manager](#)   [Process Monitor](#)   [Run](#)

Process Instance: 2084391

**Missing From CAT Report Run Parameters**

\*Fiscal Year: 2017 🔍

\*Business Unit: UWMSN 🔍

Division:  🔍

Department:

**Employee Class**

Employee Class - All Values:

[Select Values](#)

[Save](#)   [Notify](#)                      [Add](#)   [Update/Display](#)

- Search for your process instance number under Process List, which will indicate the status of the report generation. When the report is complete, Run Status will be "Success" and Distribution Status will be "Posted".
  - If Run Status is "Queued," it indicates that the report generation is waiting to start.
  - If Run Status is "Processing," it indicates that the report generation is processing.
  - Click **Refresh** at the top right of the window to refresh the status of the document.

Process List Server List

**Actions**

User ID 00699002 Type Last 1 Days Refresh

Server Name Instance to

Run Status Distribution Status Save On Refresh

**Process List** Personalize Find View All First 1-2 of 2 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2082011		Application Engine	UW_CAT_MSRPT	00699002	11/24/2015 1:53:25PM CST	Processing	N/A	<a href="#">Details</a>

5. Once the Run Status hits "Success" and the Distribution Status hits "Posted," download the output.
  - a. Click **Details**.

Process List Server List

**Actions**

User ID 00699002 Type Last 1 Days Refresh

Server Name Instance to

Run Status Distribution Status Save On Refresh

**Process List** Personalize Find View All First 1-2 of 2 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2082011		Application Engine	UW_CAT_MSRPT	00699002	11/24/2015 1:53:25PM CST	Success	Posted	<a href="#">Details</a>

b. Click **View Log/Trace** at the bottom right of the window.

Process Detail	
<b>Process</b>	
Instance 2082011	Type Application Engine
Name UW_CAT_MSRPT	Description Missing from CAT Report
Run Status Success	Distribution Status Posted
<b>Run</b>	<b>Update Process</b>
Run Control ID ABC01	<input type="radio"/> Hold Request
Location Server	<input type="radio"/> Queue Request
Server PSUNX	<input type="radio"/> Cancel Request
Recurrence	<input checked="" type="checkbox"/> Delete Request
	<input type="radio"/> Restart Request
<b>Date/Time</b>	<b>Actions</b>
Request Created On 11/24/2015 1:53:26PM CST	<a href="#">Parameters</a> Transfer
Run Anytime After 11/24/2015 1:53:25PM CST	<a href="#">Message Log</a> <a href="#">View Locks</a>
Began Process At 11/24/2015 1:53:47PM CST	<a href="#">Batch Timings</a>
Ended Process At 11/24/2015 1:59:05PM CST	<a href="#">View Log/Trace</a>
OK	Cancel

- c. Under File List, click the file with the .xls extension to download the output. Note: you may have two .xls outputs if you have any additional splits.

### View Log/Trace

**Report**

**Report ID:** 1170892      **Process Instance:** 2084391      [Message Log](#)

**Name:** UW\_CAT\_MSRPT      **Process Type:** Application Engine

**Run Status:** Success

Missing from CAT Report

**Distribution Details**

**Distribution Node:** HRQA\_RPTNOD      **Expiration Date:** 12/10/2016

**File List**

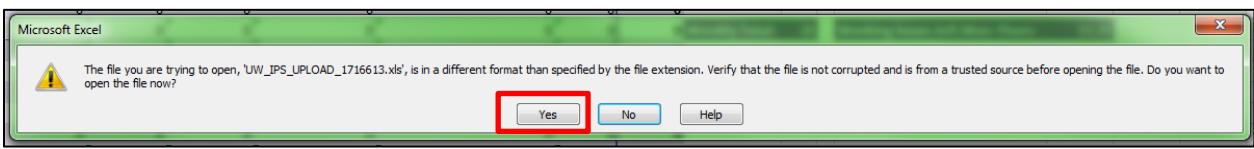
Name	File Size (bytes)	Datetime Created
<a href="#">AE_UW_CAT_MSRPT_2084391.AET</a>	4,013	12/11/2015 4:27:22.796425PM CST
<a href="#">AE_UW_CAT_MSRPT_2084391.log</a>	531	12/11/2015 4:27:22.796425PM CST
<a href="#">AE_UW_CAT_MSRPT_2084391.trc</a>	205	12/11/2015 4:27:22.796425PM CST
<a href="#">CAT_Missing_Rpt_2084391.xls</a>	2,964,899	12/11/2015 4:27:22.796425PM CST
<a href="#">CAT_Missing_Rpt_Addl_Splits_2084391.xls</a>	20,026	12/11/2015 4:27:22.796425PM CST

**Distribute To**

Distribution ID Type	*Distribution ID
User	00305896

[Return](#)

- d. When opening the file in Excel, if an error message appears indicating that “The file you are trying to open...is in a different format than specified by the file extension,” click **Yes**.



- e. Note that different internet browsers may have different opening processes.

6. Review the report.
  - a. Open the downloaded Excel file.
  - b. The following groups are not included in the budget by person at UW-Madison and were excluded from the CAT budget initialization. You will need to delete or filter out the following groups from the report:
    - PAY BASIS “N” (no pay basis) and “L” (lump sum pay basis)
    - EMPL CLASS “AS” with PAY BASIS “H” (academic staff – hourly)
    - JOB CODES beginning with “D80” (Lecturers) or “D91” (Faculty Assistants) that have a CONTINUITY beginning with “2” (Fixed – Terminal)
  - c. Employees without commitment accounting funding at the time of the initialization were also excluded from the load. Once commitment accounting funding is known, you will need to manually enter these individuals in the CAT (if they are to be included in the budget).
    - i. If a particular employee record should be added, navigate to *Workforce Administration > Compensation Administration Tool > CAT Page > Add a Value*
    - ii. Enter the empl id and empl rcd
    - iii. A blank CAT page will appear for the user to enter rate increases and funding information.

## Tables

Report Parameters	
Field Name	Description
Run Control ID	The run control identification entered when report was created.
Run Date	The date the report was created.
Fiscal Year	The fiscal year selected in the run control.
Business Unit	The Business Unit selected in the run control.
Division	The Division (if any) selected in the run control.
Process Instance	The number assigned by PeopleSoft for each process.
Run By	The user ID of the user who ran the report.
Employee Class	The employee classes included on the report’s run control.
Department	The Department (if any) selected in the run control.
Report Columns	
Column	Description
FISCAL YEAR	The upcoming fiscal year that is active in the CAT.
BUSINESS UNIT	The Business Unit of the employee record from HRS.
HOME DEPT (DEPT ID)	The Home Department of the employee record from HRS.
EMPLOYEE ID	The Employee ID of the employee record from HRS.
EMPLOYEE RECORD NUMBER	The Employee Record Number of the employee record from HRS.
NAME DISPLAY	The Employee Name of the employee record from HRS.
EMPLOYEE CLASS	The Employee Class of the employee record from HRS.



POSITION NUMBER	The Employee Position Number of the employee record from HRS.
JOB CODE	The Jobcode of the employee record from HRS.
TITLE (JOB CODE DESCRIPTION)	The Title of the employee record from HRS.
CONTINUITY CODE	The Continuity Code of the employee record from HRS.
FTE	The FTE of the employee record from HRS.
PAY BASIS	The Pay Basis of the employee record from HRS.
COMPRATE	The Comprate of the employee record from HRS.
ANNUALIZED FULL TIME RATE (1 FTE)	The Annualized Full Time Rate (annual salary as if 1FTE) from HRS.
EXPECTED END DATE	The Expected Job End Date of the employee record from HRS if they have one.
FUND CODE (1,2,3,4,5)	The Fund of the funding string(s) of the employee record from HRS.
DEPARTMENT (1,2,3,4,5)	The DeptID of the funding string(s) of the employee record from HRS.
PROGRAM (1,2,3,4,5)	The Program of the funding string(s) of the employee record from HRS.
PROJECT ID (1,2,3,4,5)	The ProjectID of the funding string(s) of the employee record from HRS.