

Module 7

Closeout

This module will discuss the following:

- Recommendations for Successful Reporting
- Ad Hoc Report Procedures
- Practice Set

Supporting Documents/Items:

- Training workbook
- Class notes and classmates
- CIRS Data Element Dictionary
- CIRS Compendium Reports
- CIRS Common Library
- CIRS Web Site

Recommendations for Successful Reporting

- Allow an in-house training period of 2-3 hours per week for 1 month to become comfortable with the system and familiar with basic Ad Hoc report writing.
- Inform staff/managers of Ad Hoc reporting capabilities.
- Develop procedures for requesting, processing and providing Ad Hoc reports.
- Hold regular meetings among Ad Hoc users to share information and promote networking.

Ad Hoc Report Procedures

When you need data from CIRS, follow these steps:

Check the Compendium

Hundreds of pre-generated reports are available at no additional cost. The report data can be accessed without knowledge of FOCUS commands. If the exact data needed is not found, use Compendium reports to verify ad hoc reports.

Check the Common Library and the CIRS Web Site

Common Library contains programs written by users at other campuses that can be copied into your library and modified. Always verify the programs before using. The CIRS Web Site is another source for sample programs.

Write an Ad Hoc Report Request

If you didn't find what you were looking for in the sources above, write an ad hoc report request.

1. Identify the file(s) that contains the type and timeframe of data, needed for the report. If data is needed from more than one file, determine if a join is available between the files, if not, a match is needed.
2. Identify the display, sort and screening fields needed. Create any temporary fields, if needed. Be sure to test defined fields before using in the final report request.
3. Write the report request to gather the needed data. If additional processing of the data is required, a hold file is needed. Be sure to check the master file description of your hold file before using the data.
4. After obtaining the needed data, customize the report format as needed. Note: Most formatting commands (e.g., Headings, Footings, Totals, etc.) are ignored when data is placed in a hold file.
5. Use record limits in all phases of development and test your request in the Online FOCUS environment.
6. After testing, remove the record limits and execute using Batch.

Answers To Practice Set

Request #1:

Write a report that provides a count and percentage of active positions for Fall 2002. Do not include persons with intermittent employment or employees on leave.

Solution:

The AN file was selected to identify active positions as of October 31 (fall). A define is used to place employees into the major employee groups and direct operators are used to get the position counts and the percentage.

```
-* EMPLOYEE COUNTS AND PERCENTAGE AS OF OCT 31, 2002
EX AN
DEFINE FILE AN ADD
EEGROUP/A20 =
    IF AN:CBID EQ 'R03' THEN 'FACULTY' ELSE
    IF AN:CBID EQ 'M80' OR 'M98' THEN 'MANAGEMENT'
    ELSE 'STAFF' ;
END
-*
TABLE FILE AN
SUM CNT.AC:SSA      AS 'TOTAL'
    PCT.CNT.AN:SSA  AS 'PERCENT'
BY EEGROUP          AS 'EMPLOYEE GROUP'
IF AC:TIMEBASE NE 'INT'
IF AC:SEPCODE NE 'T'
ON TABLE COLUMN-TOTAL
END
```

Answers To Practice Set, con't

Request #2:

Develop a report to identify your active employees who were age 50 or older with 20 or more years of service as of January 1 of the current year.

Solution:

The AC file was used to report on active employees. Defines are needed to identify the employee's age and years of service as of January and the fold-line command is used to narrow the width of the printed report.

```
-* EMPLOYEES OVER 50 W/20 OR MORE SERVICE YEARS
EX AC
DEFINE FILE AC ADD
AGE/I5 = ('JAN 01 2002' - AC:BRTHDATE)/365;
YRS/I5 = ('JAN 01 2002' - AC:EMPDATE)/365;
END
-*
TABLE FILE AC
PRINT AC:WNAME/A15 AS 'EMPLOYEE'
      AC:BRTHDATE AS 'BIRTHDATE'
      AGE
      AC:EMPDATE AS 'EMPLOY DATE'
      YRS
BY DEPTNAME AS '' FOLD-LINE
BY AC:WNAME NOPRINT
END
```


Answers To Practice Set, con't**Request #3:**

Write a report to identify the total gross pay for the current fiscal year, by pay period, for non-citizen employees. Produce a running total.

Solution:

A match is needed between the PH current fiscal year file to identify year to date earnings and the AC file to obtain non-citizen data. Use the compute command to produce a running total.

```

-* YTD PAY FOR NON-CITIZEN EMPLOYEES
EX PH
EX AC
-*
MATCH FILE AC
PRINT AC:WNAME AC:NONCITZN
BY AC:SSA AS 'SSA'
IF AC:NONCITZN NE ' ' OR '0000000000'
RUN
-*
FILE PH
SUM PH:GROSSPAY
BY PH:SSA AS 'SSA'
BY PH:PAYPERIOD
AFTER MATCH HOLD AS PERMSML
OLD-AND-NEW
END
-*
TABLE FILE PERMRML
PRINT AC:WNAME
      AC:NONCITZN
      PH:PAYPERIOD
      PH:GROSSPAY
AND COMPUTE TOTAL/P12.2M =
      IF SSA EQ LAST SSA
      THEN (TOTAL + PH:GROSSPAY)
      ELSE PH:GROSSPAY;
BY SSA UNDER-LINE
END

```