



WHITE PAPER

HRIS Operational Reports:

Fast, Easy and Secure



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Abstract: Everyday HRIS reports. Whether developing, running or distributing reports HRIS operational data is used every day. From simple to complex requests, HRIS provides information throughout organizations. With new security regulations regarding personal data, HRIS is tasked with additional responsibilities. This white paper will discuss how the qualities of Rwiz® 5.4, a proven, intuitive operational reporting tool provides IT, HRIS and their end-users with a number of automated features that simplify and streamline report generation and security. Rwiz works with the Oracle®/PeopleSoft HRMS and provides a number of more powerful features than PeopleSoft Query.

The first part of this white paper describes three scenarios. Directly following these brief use models is a detailed product specification.

Fast and Effective Solutions

Situation: A major multinational keeps four HRIS specialists (Oracle/PeopleSoft environment) busy with ad-hoc query requests. This team processes over 20 requests a day. They write, run and securely distribute reports and data to a worldwide workforce. This team deals with a staggering amount of data and very strict security guidelines.

Solution: This group uses Rwiz for all their HRIS reporting needs. Simple requests are quickly dealt with leading to a high level of internal customer satisfaction. Besides the ability to write queries quickly, the sheer number of requests requires efficient query execution. This team compared the query run times of Rwiz vs. PeopleSoft Query and found substantial time savings (from 30 minutes to 8 hours) with Rwiz. Unlike other reporting tools, Rwiz directly queries the PeopleSoft database, reducing other processes and returns data quickly.

Functional Reporting For IT, HRIS and End-Users

Situation: Oracle/PeopleSoft Upgrades or Migration to a new HRMS System
During a recent upgrade to PeopleSoft 9.x, a major hospital set a goal of facilitating a smooth upgrade process for all stakeholders. Testing of data prior to going live was a priority.

Solution: First the IT and HRIS staff ran macro level testing. By running Rwiz reports against planned data extracts, technical and functional testers easily compared before and after data (using the Beyond Compare™ utility from Scooter Software) to find inconsistencies ahead of deployment. Efficiencies gained with Rwiz allowed more tests to be run in a shorter period of time. Before going live end-users were asked to run their reports and compare results. This enabled the end-users to be part of the upgrade; made training on the new software more interactive (and successful) and they were able to catch data inconsistencies that IT and HRIS did not detect. This added focus on testing led to a smoother and more efficient upgrade.

Secure Reporting - Access to and Distribution of Information

Situation: A large financial institution is addressing secure distribution of sensitive HR data. The HRIS team needs to protect sensitive data distributed on email or posted on websites. HRIS also has to ensure that HR data from reports run by functional users is distributed securely.

Solution: This HRIS department developed a strong security policy and it required an equally strong enforcement mechanism. Rwiz has a feature to automatically encrypt report results. During report building, Rwiz brings up a check-box feature that ensures the report data is encrypted before it is shared. The person creating the report can select an option that forces the person running and sharing the report to encrypt results. The encryption setting is flexible allowing the report creator to select the protection of all reports or specific reports. You can also set on a macro or micro level who can run and/or view the report or different elements of the report. This makes it easy to enforce today's laws about protecting sensitive data.

The Rwiz automatic encryption feature can be set to require report creators to specify security levels for safe distribution. Rwiz supports current PeopleSoft security features and has added features to help users meet newer stricter guidelines. Rwiz offers row level security; automatic encryption for sharing information via email and the Web.

Rwiz in Action

Secure Report Building

In addition to encrypting report results, providing and restricting access to runs the reports is the first line of security. Rwiz ontheweb lets you build secure, multi-level reports. Beginning with a single report you can set various levels of security access to different types of information.

Sub-Reports

The Sub-Report feature allows you to build reports that allow users to 'drill down' or access more information based on current report results. And you can set access depending on the information. For example, here's a primary report producing a list of active employees by Business Unit. The three sub-reports associated with the primary report provide the user with additional information on an employee's employment information, current address and job history. The primary report in this example is a drilldown report that displays each Business Unit and number of active employees.



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Reports - View Results [Logout](#)

Active Employees

Business Unit > [Details](#) [Search...](#)

Business Unit ▲	Total Employees
AUS01	215
BEL01	6
CAN01	90
CHE01	76

Clicking on the link corresponding to a Business Unit will display the list of its active employees with basic information about each employee.



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Active Employees

Business Unit [US004](#) > [Details](#) [Search...](#) 1-15 of 16 [view 16](#) ◀ ▶

ID	Department	Name	Job Title	Employment Information	Current Address	Job History
KU0004	Corporate Headquarters	Grafton, Kenneth	Vice President-Sales	Employment Information	Current Address	Job History
KU0056	Customer Service	Ng, Edward	Server-Food	Employment Information	Current Address	Job History
KU0053	Customer Service	Sevilla, Maria	Consultant-Junior	Employment Information	Current Address	Job History
KU0106	Finance	Chae, Kevin	Clerk-Payroll	Employment Information	Current Address	Job History

Additional information for an employee can be obtained by clicking on one of the hyperlinks displayed on the right-hand side where each of these links corresponds to a sub-report. Clicking on the Employment Information link on the line corresponding to a specific employee will run that sub-report and display its results. This is more secure than creating an output with all the data for every person.



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Employment Info

[Search...](#) 1-1 of 1 [view 1](#)

Name	Hire Date	Rehire Date	Service Date	Seniority Date
Grafton, Kenneth	04/02/1980	04/02/1980	04/02/1980	04/02/1980

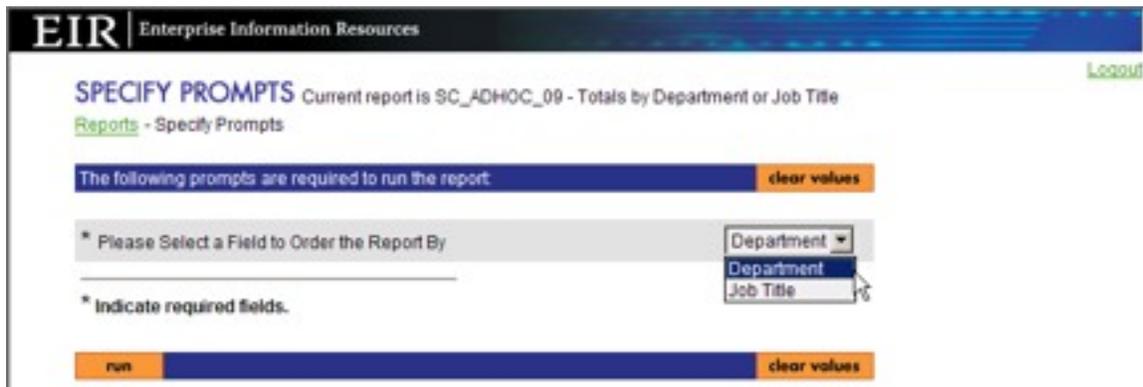
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Similarly, you can obtain an employee's address and job history by clicking the Current Address and Job History links which will run and display the results of those sub-reports. And the Job History sub-report will display completely different information pertaining to the employee of interest.

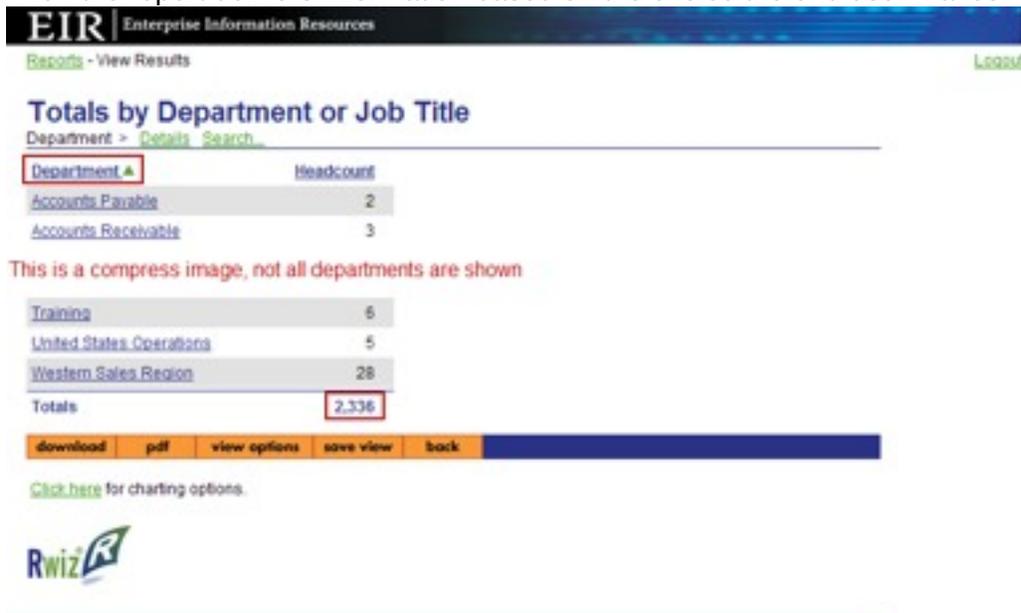
Enterprise Information Resources 411 Waverley Oaks Road, Suite 103 Waltham, MA 02452
User Specified Reports - Dynamic Columns

The dynamic columns functionality provides the ability to create a single report that can group its output based on a column that the user selects at runtime. The use of dynamic columns is illustrated in the example that follows which shows a summary report that produces a headcount of active employees.

At runtime, the user selects the column in which the headcounts are to be grouped. In the example report they can select Department, Job Title or Location as shown on the prompt page below.



Then the report delivers information based on the choice the end user makes.



Department	Headcount
Accounts Payable	2
Accounts Receivable	3
Training	6
United States Operations	5
Western Sales Region	28
Totals	2,336

In addition the optional prompts functionality is used to specify optional selection criteria that can be applied to a report at runtime. As an example, you can create a report that produces an employee listing for the entire company or only for one department that is selected by the user at runtime.

Rwiz for PeopleSoft Upgrades or Module Implementation

Strategic use of reporting tools makes implementing a new Oracle/PeopleSoft module or installing an upgrade a smoother, less time consuming project. Rwiz is easily incorporated into a PeopleSoft upgrade or current deployment. PS Query reports are easily converted into Rwiz providing users with additional functions such as the ability to run large queries and access to new report writing features such as:

Requirement	Solution	Benefit
Performance of Sophisticated or Very Large Queries	Create sophisticated queries/reports joining a large number of tables including the use of Outer Joins, i.e., joining to another table whether the data matches or not. (No limit on the amount of row level data exports.)	With multiple tables joined, Rwiz performance offers more functionality than PeopleSoft Query.
Complex Expressions	Rwiz wizard allows creation of any number of derived fields	Allows flagging a person if they meet one set of criteria vs. another. Useful testing feature.
Create Reports with Predefined Totals	Rwiz Wizard	Quick building of custom formulas for pre and post Upgrade/module implementation testing
Validate Data Prior to Upgrade Deployment	Run Rwiz reports against planned data extracts on current software and on upgrade software - prior to going live to find data issues	Smoother upgrade process

Running Reports within Rwiz or within PeopleSoft

Rwiz reports can be set up to be run by users directly from Rwiz report designer or from a web browser. Reports can also be placed on PeopleSoft menus to be easily accessed by PeopleSoft users within your organization.

Rwiz Benefits and Specifications

Requirement	Solution	Benefit
REPORT WRITING		
Easy to use	<p>GUI allows automated generation of complex SQR reports without any programming.</p> <p>For experienced SQR developers, override features provide flexibility and tool also allows for tweaking SQR code.</p>	<p>Short learning curve</p> <p>HRIS generates reports quickly</p> <p>Programming efficiency and faster queries</p>
Joins (retrieving data from multiple tables)	<p>Rwiz automatically detects the most complete joins between tables for your report</p> <p>Ability to manually change criteria</p>	<p>More complete reports with less work</p> <p>Easy to override automatic joins (if needed)</p>
Joining tables on fields with different names	Easy to use interface for selecting join criteria.	Quickly build queries
Outer Joins (to include rows even if no match is found)	<p>Switch easily between regular and outer joins.</p> <p>Outer Joins implemented as separate queries</p> <p>If no match is found, the Outer Join query will return a blank for text/date fields and a 0 for numeric fields.</p>	<p>No coding needed to switch between regular and outer joins</p> <p>Overcomes limits associated with Outer Joins encountered when using PeopleSoft Queries with Peopletools 8.49 and above. Outer joins will work no matter how many secured tables are being queried and no matter what expression you are using in your query.</p>

Requirement	Solution	Benefit
Combining multiple rows onto a single line in your report	<p>Add the same table multiple times to your report.</p> <p>Define derived fields to hold each possible value for a particular item (i.e. each possible plan for an employee).</p>	<p>Multiple ways to combine rows.</p> <p>Easy to understand reports, for example, data, stored in more than one row, such as health information, can appear on a single line in a report.</p>
Getting the right effective-date row	<p>Automatic generation of the effective date and effective sequence criteria</p> <p>Users can modify the effective date and sequence criteria and specify additional criteria inside the sub-select.</p>	<p>Automatically retrieves the most recent row for tables containing an EFFDT or EFFSEQ)</p> <p>Ability to modify these fields</p>
Generating efficient SETID criteria	<p>Rwiz automatically uses most efficient settings wherever PeopleSoft has been optimized to bypass the Set Control Record table.</p> <p>Optimizes code if there is only one SETID value, or if the table you're joining to has a column that can be joined directly to the SETID column.</p>	<p>Greater efficiency in building queries.</p> <p>Automatic code optimization</p>
Defining Formulas	Define formulas for calculating totals	Eliminates the need for manually updating reports
Generating subtotals	Summarize data and generate subtotals according to groupings based upon any of the fields you've chosen to include in your report	Easy, flexible reporting
Creating summary reports	Summarize data and create reports that only show totals according to groupings based upon any of the fields you've chosen to include in your report.	Easy, flexible reporting

Requirement	Solution	Benefit
Create Distinct Reports	Rwiz PDF Generator	Automatically applies style to your reports. You choose header/footer, custom headers, logo, prompt information, timestamp, etc
Prompting users for information at runtime	Set prompts to appear whether a report is being run manually or through the PeopleSoft Process Scheduler.	Ensures reporting integrity
SECURITY		
Adding security to your report	Rwiz facilitates Row-Level security by enabling you to add a security table (or view) to your report main query.	Row-Level security ensures that users can only query rows that they are authorized to access.
Protecting Report Data and Distribution	Ability to set automatic encryption of any report being emailed or posted to a Website emails and web postings	Easy to implement security
Row Level Security	Password protection at the row level for reporting	Flexibility in protecting data
PERFORMANCE		
	Rwiz uses the SQR load-lookup function to read the Translate Table Row-level security is flexible Can set more efficient SETID criteria	
Generate SQR and Java Code	Rwiz automatically generates Java and SQR source code	Because Rwiz is compatible with both SQR and Java, Rwiz will work on databases other than PeopleSoft databases. This can be very useful as HR information is stored in auxiliary databases where SQR connectivity is not possible.
Security with Speed	Rwiz implements row level security in an efficient, operational manner	Row level security is critical but can often slow down a report significantly. Rwiz makes reports run fast even if row-level security is used.

Requirement	Solution	Benefit
Faster Queries	Rwiz generates efficient code; customers claim time savings of more than half	Faster turnaround times. HR report analysts can produce and deliver results faster.

The Proven User Benefits of Rwiz

Rwiz users generally fall into two categories: HRIS and IT. HRIS has in-depth knowledge of the data stored in the HR database, but typically have limited SQR programming experience. Rwiz enables these professionals to generate complicated SQR reports easily without any SQR programming.

IT produces reports primarily for the use of others within the organization. IT has SQR experience and is always looking to save time. Rwiz provides an efficient way to generate report source code for the SQR or Java expert. For IT and other power users, being able to quickly generate code as a base for complex queries saves time.

Rwiz saves your day by taking the time consuming work out of report writing.

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