

STATE OF REPORTING

PEOPLESOFT
INSTITUTIONS

AGENDA

- Higher Education Reporting Issues
- Recommendations from PAG
- PeopleSoft Delivered Reporting
- Reporting Platforms Utilized by Other Institutions

Higher Education Reporting Issues

PeopleSoft Higher Education Product
Advisory Group (PAG) held conference
calls on reporting issues and the following
five themes summarize the functional-area
perspectives on reporting.

Higher Education Reporting Issues

- Reporting is an essential component of all PeopleSoft systems, but PeopleSoft does not provide adequate reporting solutions to higher education customers
- Many of the delivered reports currently provided are of limited value because they are inflexible, not well documented, and not linked to record-level detail

Higher Education Reporting Issues

- Reporting Solutions must support institutional customization and ad hoc reporting needs
- Many, perhaps most, customers meet their reporting needs by creating data structures designed to support reporting with a variety of user friendly tools

Higher Education Reporting Issues

- The lack of delivered reporting solutions means that PeopleSoft customers devote duplicative effort to building campus-specific solutions to common problems

Higher Education Reporting Issues

- The following four recommendations address these common problems.

Recommendations

- PeopleSoft should deliver as part of each ERP application fully documented data structures to support flexible end user reporting with a variety of tools, integrated across systems, and supported by row level security

Recommendations

- To accommodate different budgets, PeopleSoft should provide data structures for reporting by offering customers a choice between purchasing 1. The data mappings and documentation for institutional use, 2. An installed structure plus delivered reporting solutions

Recommendations

- PeopleSoft should provide reports that are fully documented, customizable, and extensible, with all summary data linked to record level detail

Recommendations

- PeopleSoft should convene a focus group in each functional area to identify common management reporting needs, review the delivered reports currently offered, and recommend the addition, improvement, and discontinuation of specific reports

Identified Issues by PAG

- Reporting Data Structures
- Tools
- Data Documentation
- Delivered Reports
- Customized Reporting

Reporting Data Structures

- Several institutions initially designed reporting strategies that began with the use of delivered reports and transaction-system data
- Moved to the development of reporting data structures providing power, simplicity, flexibility, speed, and an integrated approach to routine reporting and ad hoc analysis

Reporting Data Structures

- Most of the data structures (warehouses) customers have developed use third party tools such as Brio, Cognos, Access, SAS
- Customers that have not developed formal data warehouses, create data extracts that “flatten” and reorganize transaction-system data to support reporting

Reporting Data Structures

- Data Extracts are created using tools such as Access to avoid the limitations of PSQuery and the technical difficulty of SQR
- Limitations of local reporting systems
 - Time and technical expertise required to develop
 - Maintenance through upgrades

Tools

- Limitations of delivered reporting tools
 - PSQuery
 - performance problems, complex joins
 - nVision
 - difficult to use for large scale reports
 - SQR
 - required technical expertise, printer formats

Data Documentation

- Lack of data dictionary and data mappings impedes the development of institutional reporting solutions and the use of delivered reports
 - Data derivation of delivered reports is not understood
 - Data structure not available to Query users

Delivered Reports

- Lack of standard operational reports required by all institutions
 - Audit reports such as imbalance between student financials and general ledger
 - Reports to track students on payment plans
 - Budget to actual comparisons
 - Reports to track student status changes

Delivered Reports

- Several delivered reports are of limited value and all are virtually useless without customization
 - Do not meet reporting needs
 - Do not provide accurate data
 - Lack of ability to drill down to record level
 - Lack of documentation

Customized Reporting

- 90% of reporting needs are ad hoc
- Recommend PeopleSoft develop
 - Customizable queries to be used for standard management questions
 - Development of tools to empower non-technical users to run these queries
 - Develop reporting systems that optimize electronic report distribution via desktop
 - Develop an efficient row-level security system to support these applications

Participants

- Stony Brook University
- University of Alberta
- Indiana University
- University of Kansas
- Northwestern University
- College of Lake County
- University of Queensland
- University of Kentucky

Participants

- Bryn Mawr
- University of Wisconsin –Whitewater
- Texas Christian University
- Western Michigan University
- University of Wisconsin System
- University of St. Thomas
- Syracuse University

Recommended Publication

- PeopleSoft HRMS Reporting
 - Critical guide to how PeopleSoft works behind the scenes

Author: Adam T. Bromwich

Publisher: Prentice Hall

How to extract data-the first time

Avoid costly mistakes arising from enterprise-wide implementation

Covers HR, Benefits, Payroll and more

Master the SQR language to create robust reports

PeopleSoft HRMS

- HR application has market dominance
- Written by HR professionals
- Reflects a best practices mentality
- Provides applications necessary for making customizations (People Tools)

PeopleSoft HRMS

Two main components

- HR application
actual programs used to manage HR such as recruit workforce, position management, administer workforce
- People Tools
tools that write, compile, and “read” the language

PeopleSoft HRMS

- Application Designer

principal tool for modifying the PeopleSoft delivered package

allows programmer to to add, modify, delete, view tables, panels, fields, and menus

PeopleSoft HRMS

- All of the information in the PeopleSoft database is stored in different tables
- Definition of a table is mirrored in Application Designer
 - Allows user to see a list of fields that make up the table
 - Double clicking the fields will yield the field definitions

PeopleSoft HRMS

- PeopleSoft is designed to be customized
- Customization is risky path to take
 - Tendency to over customize
 - Can affect processing, delivered reports, maintenance is a burden

PeopleSoft HRMS

- HRMS database has over 5,000 tables
- Data is stored once for data integrity
- Each release spreads the data thinner which requires more tables
- Multiple tables makes the database more efficient but has the opposite effect on user attempting to extract the data

PeopleSoft HRMS

- Users need to find data when and where they need it
- Most queries against the database require at least a 7-table join for basic information
- Knowing where to find each data element and how to link them together is NOT common knowledge
- It is critical to understand which tables are the core sources of information

PeopleSoft HRMS

- 75 tables contain the most commonly used data in PeopleSoft HRMS
- Six basic types of tables
- Must know what you are looking for
 - Tables that come *before* a functional process
 - Tables used *during* the process
 - Tables populated with the *results* of the process

PeopleSoft HRMS

- Tables contain different types of keys that are needed in reporting
- Tables have required fields
- Translate Values
- Effective Dating
- Users must understand the structure of the database in order to be able to extract data

PeopleSoft HRMS

- To facilitate reporting PeopleSoft provides *Views* and *Reporting Tables*
- Views take fields from several tables and combines into one table
- Over 1,500 views come delivered with PeopleSoft

PeopleSoft HRMS

Not the *end all be all* of reporting

- Limitations

Degrade performance

Hide the underlying data from the user

Links may not be appropriate for desired reporting

PeopleSoft HRMS

- Advantages
 - Simplify the database
 - Solves problem of linking tables
 - Modifications are not necessary

PeopleSoft HRMS

Reporting Tables

- similar to *views* but table links are performed once a day
- principal advantage is performance
- PeopleSoft provides 3 reporting tables

PeopleSoft HRMS

Reporting table limitation

- Data is not always current
- Not all of the employees are in the table
- Some of the fields are missing
- Customizations must be duplicated
- Certain status cannot be detected
- Effective dating is misleading

PeopleSoft HRMS

- PeopleSoft recommends organizations create their own reporting table
 - Allows addition of new fields
 - Customized to meet unique reporting needs

Platforms Used by Other Institutions

Due to complexity of database structure other institutions have developed reporting platforms outside the delivered PeopleSoft solution

- Forged new partnership with IT community
- Created data warehouse, data marts, that contain denormalized data

Other Reporting Platforms

Most commonly used tools

- Brio
- Cognos
- Access
- SAS

What Next for UM

- Enlist the assistance of IT community
- Users need access to data that is denormalized
- Users need a tool that matches reporting needs and skill level
- Users need training on the tool

ALL I WANT IS A REPORT!!!!