

Web-based SPAR – Person Inquiry Screen

Person Inquiry Screen Purpose

The **Person Inquiry Screen** provides access to salary distribution for individuals by:

- Individual's full name and employee number
 - Specific time period
 - Specific payroll name
-

I. Log In

- Log in at my.pitt.edu.**
- Access PRISM**
- From the Main Menu, choose the PLD role you have been assigned**

II. Select Person Inquiry Screen

Person Inquiry Screen

Detail	Payroll Name	Account Number	Element Name	SPAR Req Element	Amount
<input checked="" type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
					Total

III. Person Inquiry Input

A. Full Name

- i. **Input Option 1:** Type an individual's full or partial name directly in the **Full Name field**. Click **Enter** or **Find**.
 - a. If more than one result is returned, a pop-up box will list the results
 - b. Highlight the desired selection
 - c. Click **OK**

TIP: Format should be last name, first name (include a comma followed by a space).

TIP: Last name only or partial last name can be entered to search for all last names with that character string.

- ii. **Input Option 2:** Click in the **Full Name field** and click on the three dots on the right side of that field. The individual's name may be entered by any of the below three options.
 - a. Directly type the full name (last, first) into the **Full Name** field if known
 1. Click **Find**
 2. Highlight the desired selection
 3. Click **OK**
 - b. Type a partial name in the **Full Name** field and click **Find**
 1. Highlight the desired selection
 2. Click **OK**
 - c. Type a partial name followed by the **% symbol (wildcard)**
 1. Click **Find**
 2. Highlight the line for the desired employee
 3. Click **OK**

TIP: Format should be last name, first name (include a comma followed by a space).

TIP: Last name only or partial last name can be entered to search for all last names with that character string.

TIP: If nothing is returned after a search, there is no name that matches the limits that were entered.

TIP: Enter a partial name to limit the list.

*TIP: Enter % to display all values. **WARNING:** Entering % to view all values may result in a long processing time. Entering criteria to reduce the list may decrease processing time.*

Full Name Screen

Full Name

Enter a partial value to limit the list, % to see all values.

Warning: Entering % to see all values may take a very long time. Entering criteria that can be used to reduce the list may be significantly faster.

Find

Full Name	Employee_Number
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Eind OK Cancel

B. Employee Number

- i. **Input Option 1:** Type an individual's full or partial employee number directly in the **Employee Number field**
 - a. If more than one result is returned, a pop-up box will list the results
 - b. Highlight the desired selection
 - c. Click **OK**

TIP: Enter a partial value to limit the list.

TIP: Enter % to display all values. WARNING: Entering % to view all values may result in a long processing time. Entering a partial value with % should be used to reduce the list and decrease processing time.

TIP: If an invalid employee number is entered, error message "FRM-40212: Invalid value for field FULL_NAME" will be returned. Click OK and enter a valid number.

- ii. **Input Option 2:** Click in the **Employee Number field** and click on the three dots on the right side of that field. Employee number may be entered using any of the below 3 methods. Click **OK**.
 - a. Directly type the full employee number into the **Find box** and click **Find**
 1. If more than one result is returned, a pop-up box will list the results
 2. Highlight the desired selection
 3. Click **OK**
 - b. Type a partial segment followed by a % and click **Find**
 1. Highlight the desired selection
 2. Click **OK**
 - c. Type % in the **Find box** and click **Find**
 1. Highlight the line for the desired employee
 2. Click **OK**

TIP: Enter a partial value to limit the list to all employees with that character string in their employee number.

TIP: Enter % to display all values. WARNING: Entering % to view all values may result in a long processing time. Entering a partial value with % should be used to reduce the list and decrease processing time.

Employee Number Screen

Employee Number	Full Name
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C. Payroll Name From and Payroll Name To

i. **Input Option 1:** Type directly in the **Payroll Name From** or **Payroll Name To** field

- a. Type the 2-digit month, space, and 4-digit year (ex: 09 2012)
- b. Click **Find** (to the right of the **Payroll Name To** field) or hit the **Tab** key
- c. Highlight the line for the correct Payroll Name
- d. Click **OK**

ii. **Input Option 2:** Click in the **Payroll Name From** or **Payroll Name To** field and click on the three dots on the right side of the field. Make selection using the below options.

- a. Scroll through the list using the scroll bar on the right of the box and highlight the selection. Click **OK**.
- b. In the **Find** field, click to the left of the % sign
 1. Enter the 2-digit month, space, and 4-digit year before the % sign
 2. Click **Find** to select from all Payroll Names for that month
 3. Highlight the line for the correct Payroll Name
 4. Click **OK**
 5. Click **Find** to the right of the **Payroll Name To** field

*TIP: To view all salary distributions for the life of the individual's employment, do not enter dates. Click **Find**. Electronic SPAR distribution data is available back to July 2002.*

TIP: To view salary distributions for a single month of the individual's employment, enter only the **Payroll Name From field** and click **Find**.

TIP: To view salary distributions for a specific date range of the individual's employment, enter both the **Payroll Name From** and **Payroll Name To** fields. Click **Find**.

TIP: If you change the **Payroll Name From** value after a value is entered for **Payroll Name To** and click **Find**, only the distribution information for the new **Payroll Name From** month will display. You will need to re-enter the **Payroll Name To** field to extend the range.

TIP: Enter date format as 2-digit month and 4-digit year: 10 2012.

Payroll Name From Screen

Payroll Name	Start Date	End Date	Oracle Payroll Name	Oracle Period Name
11 2011 Pitt Monthly	01-NOV-2011	30-NOV-2011	Pitt Monthly	11 2011 Calendar Month
12 2011 Pitt Monthly	01-DEC-2011	31-DEC-2011	Pitt Monthly	12 2011 Calendar Month
01 2012 Pitt Monthly	01-JAN-2012	31-JAN-2012	Pitt Monthly	1 2012 Calendar Month
02 2012 Pitt Monthly	01-FEB-2012	29-FEB-2012	Pitt Monthly	2 2012 Calendar Month
03 2012 Pitt Monthly	01-MAR-2012	31-MAR-2012	Pitt Monthly	3 2012 Calendar Month
04 2012 Pitt Monthly	01-APR-2012	30-APR-2012	Pitt Monthly	4 2012 Calendar Month
05 2012 Pitt Monthly	01-MAY-2012	31-MAY-2012	Pitt Monthly	5 2012 Calendar Month
06 2012 Pitt Monthly	01-JUN-2012	30-JUN-2012	Pitt Monthly	6 2012 Calendar Month
07 2012 Pitt Monthly	01-JUL-2012	31-JUL-2012	Pitt Monthly	7 2012 Calendar Month
08 2012 Pitt Monthly	01-AUG-2012	31-AUG-2012	Pitt Monthly	8 2012 Calendar Month
09 2012 Pitt Monthly	01-SEP-2012	30-SEP-2012	Pitt Monthly	9 2012 Calendar Month
10 2012 Pitt Monthly	01-OCT-2012	31-OCT-2012	Pitt Monthly	10 2012 Calendar Month
11 2012 Pitt Monthly	01-NOV-2012	30-NOV-2012	Pitt Monthly	11 2012 Calendar Month
12 2012 Pitt Monthly	01-DEC-2012	31-DEC-2012	Pitt Monthly	12 2012 Calendar Month
01 2013 Pitt Monthly	01-JAN-2013	31-JAN-2013	Pitt Monthly	1 2013 Calendar Month
02 2013 Pitt Monthly	01-FEB-2013	28-FEB-2013	Pitt Monthly	2 2013 Calendar Month
03 2013 Pitt Monthly	01-MAR-2013	31-MAR-2013	Pitt Monthly	3 2013 Calendar Month
04 2013 Pitt Monthly	01-APR-2013	30-APR-2013	Pitt Monthly	4 2013 Calendar Month
05 2013 Pitt Monthly	01-MAY-2013	31-MAY-2013	Pitt Monthly	5 2013 Calendar Month
06 2013 Pitt Monthly	01-JUN-2013	30-JUN-2013	Pitt Monthly	6 2013 Calendar Month

IV. Output Screen

A. Person Inquiry screen will now be populated with data specific to the query that was run.

Person Inquiry Screen Including Search Criteria

Person Inquiry

Full Name: SPAR04, Faculty A Employee Number: 143836

Payroll Name From: 09 2012 Pitt Monthly Payroll Name To: 12 2012 Pitt Monthly **Find**

Detail	Payroll Name	Account Number	Element Name	SPAR Req Element	Amount
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Person Inquiry Screen Result

Person Inquiry

Person Inquiry

Full Name Employee Number

Payroll Name From Payroll Name To

Adjustments						
Detail	Payroll Name	Account Number	Element Name	SPAR Req Element	Amount	
<input checked="" type="checkbox"/>	12 2012 Pitt Monthly	02 22278 5100.00000.000000.01000.00000 N	Pitt Regular Salary	Y	6,400.00	<input type="button" value="Detail"/>
<input type="checkbox"/>	12 2012 Pitt Monthly	05 22278 5100.00000.113170.01000.00000 N	Pitt Regular Salary	Y	1,600.00	<input type="button" value="Detail"/>
<input checked="" type="checkbox"/>	11 2012 Pitt Monthly	02 22278 5100.00000.000000.01000.00000 N	Pitt Regular Salary	Y	6,400.00	<input type="button" value="Detail"/>
<input type="checkbox"/>	11 2012 Pitt Monthly	05 22278 5100.00000.113170.01000.00000 N	Pitt Regular Salary	Y	1,600.00	<input type="button" value="Detail"/>
<input checked="" type="checkbox"/>	10 2012 Pitt Monthly	02 22278 5100.00000.000000.01000.00000 N	Pitt Regular Salary	Y	6,400.00	<input type="button" value="Detail"/>
<input type="checkbox"/>	10 2012 Pitt Monthly	05 22278 5100.00000.113170.01000.00000 N	Pitt Regular Salary	Y	1,600.00	<input type="button" value="Detail"/>
<input checked="" type="checkbox"/>	09 2012 Pitt Monthly	02 22278 5100.00000.000000.01000.00000 N	Pitt Regular Salary	Y	6,400.00	<input type="button" value="Detail"/>
<input type="checkbox"/>	09 2012 Pitt Monthly	05 22278 5100.00000.113170.01000.00000 N	Pitt Regular Salary	Y	1,600.00	<input type="button" value="Detail"/>
<input type="checkbox"/>						<input type="button" value="Detail"/>
<input type="checkbox"/>						<input type="button" value="Detail"/>
<input type="checkbox"/>						<input type="button" value="Detail"/>
<input type="checkbox"/>						<input type="button" value="Detail"/>
<input type="checkbox"/>						<input type="button" value="Detail"/>
<input type="checkbox"/>						<input type="button" value="Detail"/>
<input type="checkbox"/>						<input type="button" value="Detail"/>
Total					32,000.00	

The result of the Person Inquiry includes retroactive adjustments indicated by a check in the **Adjustments** box. Additional information is available by clicking the **Detail** box to the left of each line. A Detail Screen will appear that reflects the source of any initial entry or subsequent adjustments and amounts, the individual who created the change and the date of the change.

Detail Screen

Detail

Payroll Name

Element Name

Detail	Account Number	Amount	Source	Created By	Creation Date
<input checked="" type="checkbox"/>	02 22278 5100.00000.000000.01000.00000 N	-1,600.00	Percentage Adjustment	Zern, Beverly K	27-JUL-2012
<input type="checkbox"/>	02 22278 5100.00000.000000.01000.00000 N	8,000.00	Original Cost - Monthly	Ostroski, Linda L	16-JUL-2012
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
Total					6,400.00

From the Detail Screen you can drill down to an additional level that will provide both the debit and credit accounts of the adjustment for a specific line. Click the **Detail** box to the left of each line to view the Detail Other Side Screen.

Detail Other Side Screen

Account Number	Amount
02.22278.5100.00000.000000.01000.00000.N	-1,600.00

OTHER SIDE OF TRANSACTION

Account Number	Amount
05.22278.5100.00000.113170.01000.00000.N	1,600.00

Total 1,600.00

CLOSE

TIP: Only individuals in the area of the user's level of security, or those to which access has been granted through a subset role, can be accessed via the Person Inquiry.

TIP: The output reflects distribution dollars for the specific month and will not agree to salary charges appearing on your Labor Distribution reports for situations where retroactive salary reallocations have been made. Retroactive reallocations automatically update the distribution for the respective SPAR month and, conversely, appear on the Labor Distribution reports in the month in which the reallocation was processed.

*TIP: A checkmark (☑) in the **Adjustments column** indicates that a retroactive adjustment for the specific period was processed. Clicking on the **Detail box** will provide the information on the initial distribution and any subsequent adjustments/reallocations.*

*TIP: When viewing the **Detail screen** for retroactive adjustments, click the **Detail box** to identify the account number representing the other side of the transaction.*

V. Export Data

- A.** Click **Export** from the **File Menu** in the upper left hand corner.
- B.** Follow directions for Exporting files found in Appendix I, Web based SPAR – Exporting Data

VI. Exit Person Inquiry Screen

- A.** Click the **upper right hand corner X** to exit, or
- B.** Click **the red box** in upper left hand corner and choose **Close**

Appendix I: Web-based SPAR – Exporting Data from the Web-based SPAR

This function can be used for **Account Inquiry (with or without subcodes), Person Inquiry, SPAR Modification History, and Labor Distribution and Cost Sharing screens.**

TIP: On the SPAR History Modification screen, only the Status screen will export, the Status Detail screen will not.

To export from the **Labor Distribution and Cost Sharing Screens**, you must export the **Effort Reporting and Distribution (top) and the Cost Sharing (bottom) sections** separately. Click in the section to be exported.

I. For Computers with Adobe Reader:

- A. Go to **File** on Toolbar at top of page.
- B. From drop down menu, select **Export**.
- C. The Oracle Application page will open. On the bottom you will see a message “Do you want to open or save XXXXX”. Select **Open**.
- D. A notepad will open with all the data you requested.
- E. To date stamp the version of information you are using, go to **Edit** and select **Time/Date**.
- F. To print data in the notepad format, select **Print** from the **File** menu.
- G. To export the data, go to **Edit** and select **Select All** or manually select the data lines you are interested in by holding down the left click button while you move the cursor over the lines selected. Right click on the highlighted data and select **Copy**.
- H. Open an Excel spreadsheet and right click in the upper most left cell you want to work with, right click and select **Paste**.

II. For Computers with Adobe Acrobat:

- A. Go to **File** on Toolbar at top of page.
- B. From drop down menu, select **Export**.
- C. The Oracle Application page will open. On the bottom you will see a message “Do you want to open or save XXXXX”. Select **SAVE**.
- D. You will receive a message box that the download is complete. Select **OPEN**
- E. The View Downloads window will open, select the download you created and from the drop down menu select **OPEN WITH**.
- F. Select Microsoft **Notepad**.
- G. A notepad will open with all the data you requested.
- H. To date stamp the version of information you are using, go to **Edit** and select **Time/Date**
- I. To export the data, go to **Edit** and select **Select All** or manually select the data lines you are interested in by holding down the left click bottom while you move the cursor over the lines selected. Right click on the highlighted data and select **Copy**.
- J. Open an Excel spreadsheet and right click in the upper most left cell you want to work with, right click and select **Paste**