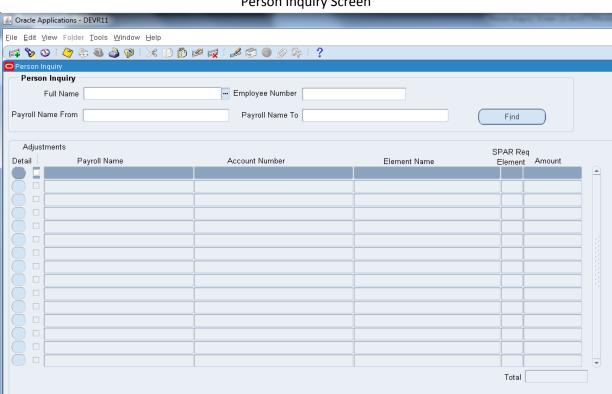
# Web-based SPAR - Person Inquiry Screen

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

#### II. **Select Person Inquiry Screen**



Person Inquiry Screen

# III. Person Inquiry Input

#### A. Full Name

- i. <u>Input Option 1:</u> 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).

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

- ii. <u>Input Option 2:</u> 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).

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

<u>TIP:</u> 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.

<u>TIP:</u> 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



#### B. Employee Number

- 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.

<u>TIP:</u> 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.

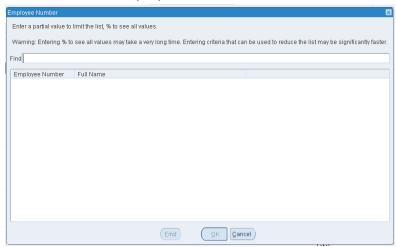
<u>TIP:</u> If an invalid employee number is entered, error message "FRM-40212: Invalid value for field FULL\_NAME" will be returned. Click OK and enter a valid number.

- ii. <u>Input Option 2:</u> 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

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

<u>TIP:</u> 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**



# C. Payroll Name From and Payroll Name To

- i. <u>Input Option 1:</u> 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. <u>Input Option 2:</u> 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

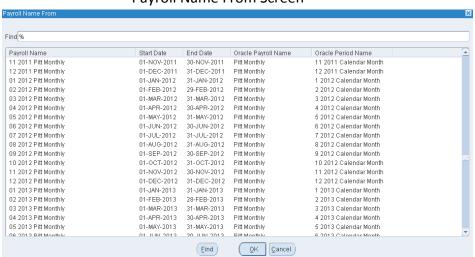
<u>TIP:</u> To view all salary distributions for the life of the individual's employment, do not enter dates. Click **Find**. Electronic SPAR distribution data is available back to July 2002.

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

<u>TIP:</u> 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.

<u>TIP:</u> 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

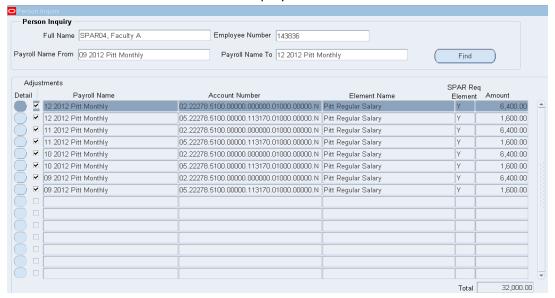
# IV. Output Screen

**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 Screen Result

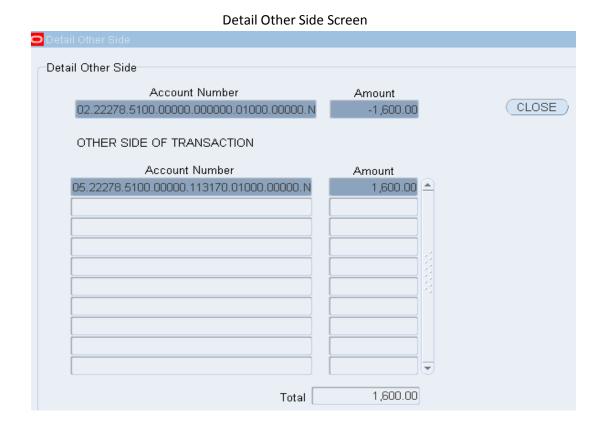


The result of the Person Inquiry includes retroactive adjustments indicated by a check in the **Adjustments** box. Additional information is available by clicking the **Detail** box to the left of each line. A Detail Screen will appear that reflects the source of any initial entry or subsequent adjustments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

#### **Detail Screen**



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.



<u>TIP:</u> 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.

<u>TIP:</u> 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.

 $\overline{IIP:}$  A checkmark ( $\square$ ) 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.

<u>TIP:</u> 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**