Payroll Information Extract (PIE) – **HR Deducting Departments**
Payroll Data Extract

The **Payroll Data Extract** can be utilized by HR Deducting departments to access detailed payroll information needed pertaining to employee deducting elements. The requestor submits the parameters for the report; the information is extracted and the report is sent in an excel spreadsheet. The requestor receives an email notice once the report is available and accessible via the UAB Report Viewer.

UAB HR Deducting Responsibility > Payroll Information Extract (PIE)

Payroll Information Extraction

Data Type / Date Range

Data
- ⦿ Payroll
- ⦿ Detail   ⦿ Summary
- ○ Person   ○ Element

Type
- ⦿ Calendar
- ⦿ Date Paid
- ⦿ All   ○ Q1   ○ Q2   ○ Q3   ○ Q4

Date

	Year	Month	Day
From:	2017	JAN	01
To:	2017	DEC	31

Main Criteria

Employee#	
Name	
Job	
Element Set	UAB PIE HR Deducting Elements
Element	

Organization	
	☐ Include Child Orgs
Payroll Type	
Asmt Category	

Account Criteria

Type

From: ___ . ___ . ___ . ___ . ___ . ___   A21 Code _____

To: ___ . ___ . ___ . ___ . ___ . ___

Clear   Submit   Close

The top portion, **Data Type/Date Range**, of the form is used to establish the type of data and date ranges desired by the requestor.

Data Type / Date Range		
Data	**Type**	**Date**
◉ Payroll	◉ Calendar	From: 2017 - JAN - 01
◉ Detail ◉ Summary	◉ Date Paid	To: 2017 - DEC - 31
○ Person ○ Element	◉ All ◉ Q1 ◉ Q2 ◉ Q3 ◉ Q4	Year Month Day

In the **Data** field, the requestor may elect to receive *detail* or *summary* information on the report. Select the *radio button* next to the desired criteria. Selecting the **Summary** option activates the **Person** and **Element** buttons.

Payroll > Detail

Data
◉ Payroll
◉ Detail   ◉ Summary
○ Person   ○ Element

Selecting the **Payroll/Detail** radio buttons will produce a report with this information

Detail Extract
FULL_NAME
EMPLOYEE_NUMBER
BLAZERID
EMAIL_ADDRESS
ASSIGNMENT_NUMBER
PRIMARY_FLAG
EMPLOYMENT_CATEGORY
PAYROLL_NAME
DATE_PAID
DATE_EARNED
PERIOD_NAME
PAY_PERIOD_START_DATE
PAY_PERIOD_END_DATE
ASSIGNMENT_ORGANIZATION
TIMEKEEPING_ORGANIZATION
ASG_ORG_UNIT
LOCATION
JOB
POSITION
CLASS_CODE

ELEMENT_NAME
REPORTING_NAME
ELEMENT_CLASSIFICATION

PAY_VALUE

TENURE_STATUS
TENURE_TRACK_DATE
TENURE_AWARD_DATE
TENURE_REVIEW_DATE
SPECIAL_TENURE_CIRCUMSTANCES

Payroll > Summary > Person

Data
◉ Payroll
○ Detail   ◉ Summary
◉ Person   ○ Element

Selecting the **Payroll/Summary /Person** radio buttons will produce a report with this information

Person Summary Extract
FULL NAME
EMPLOYEE NUMBER
BLAZERID
EMAIL ADDRESS
ASSIGNMENT NUMBER
PRIMARY FLAG
EMPLOYMENT CATEGORY
PAYROLL NAME

ASSIGNMENT ORGANIZATION

ASG ORG UNIT
LOCATION
JOB
POSITION
CLASS CODE

TOTAL PAY VALUE

TENURE STATUS
TENURE TRACK DATE
TENURE AWARD DATE
TENURE REVIEW DATE
SPECIAL TENURE CIRCUMSTANCES

Payroll > Summary > Element

Data
◉ Payroll
○ Detail   ◉ Summary
◉ Person   ◉ Element

Selecting the **Payroll/Summary /Element** radio buttons will produce a report with this information

Element Summary Extract
ELEMENT NUMBER
ELEMENT NAME
REPORTING NAME
ELEMENT CLASSIFICATION
EARNINGS TYPE
TOTAL PAY VALUE
ELEMENT COUNT

3

The requestor must determine the time period to select in the **Type** field. The options are **All** (four quarters per year), **Q1** (1st quarter), **Q2** (2nd quarter), **Q3** (3rd quarter), or **Q4** (4th quarter).

The requestor must also consider the **Type** and **Date** fields collectively. The requestor may retrieve data from any 12-month period. Dependent on the time period selected, the **Date** field will enable the requestor to input the extract parameters.

Calendar > Date Paid > All

Calendar > Date Paid > Q1, Q2, Q3, Q4

The requestor may utilize parameters in the **Main Criteria** portion to specify *who* and the *type* of data to be included on the report. A single parameter or a combination of parameters can be selected to define the contents of the report.

To select an individual by employee number, type in the individuals' 7- digit employee number in the **Employee#** parameter field and press the *Tab* key on the keyboard. The employee's name will populate in the field.

To select an individual by name, type the individuals' name *(Last Name, First Name)* or type a partial value including the *percent sign (%)* directly in the **Name** parameter field and press the *Tab* key on the keyboard. A listing of available names will appear. Select the appropriate person then select **OK**.

Extract criteria may also be filtered by organization code.

To select an organization the requestor may use partial values (i.e. letters or numbers) and the **percent sign (%)**. Select the correct organization then select **OK**.

> 📝 *Note*
> *Leaving the **Organization** parameter field blank will extract information for **all** organization codes. **The HR Deducting Responsibility is not restricted based upon HR Organizational hierarchy.***

If the **Organization** parameter field is populated, the user has the option of choosing to include all *Child Orgs*.

In the example above, the organization *311400000 Department of Medicine Chair Office* would have multiple child orgs under their organizational hierarchy. Rather than having to run multiple separate

Organization	311400000 Department of Medicine Chair Offic
	☑ Include Child Orgs

reports, the user would only have to run one report if they mark the checkbox to **Include Child Orgs**.
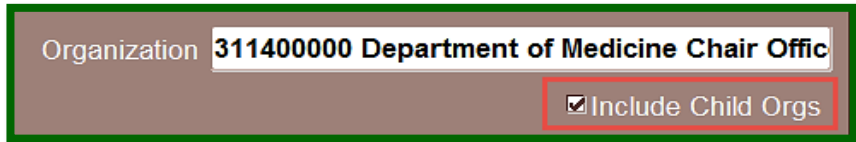
To use the **Job** parameter field as a query option, enter the job code and/or job name or use the *percent (%) sign* and any applicable numbers or letters and press *Tab* key. All available listings will appear. Select the appropriate job then select **OK**.
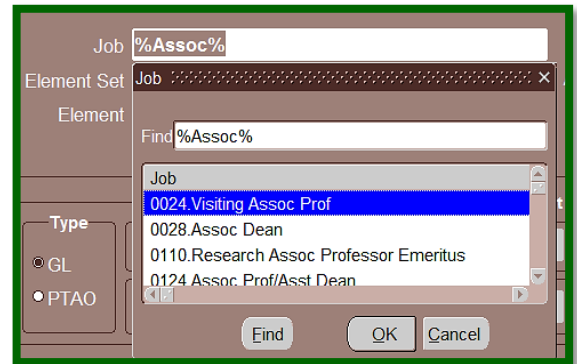
Data may also be filtered according to the *Element Set*. The default, **UAB PIE HR Deducting**, includes all deducting elements.
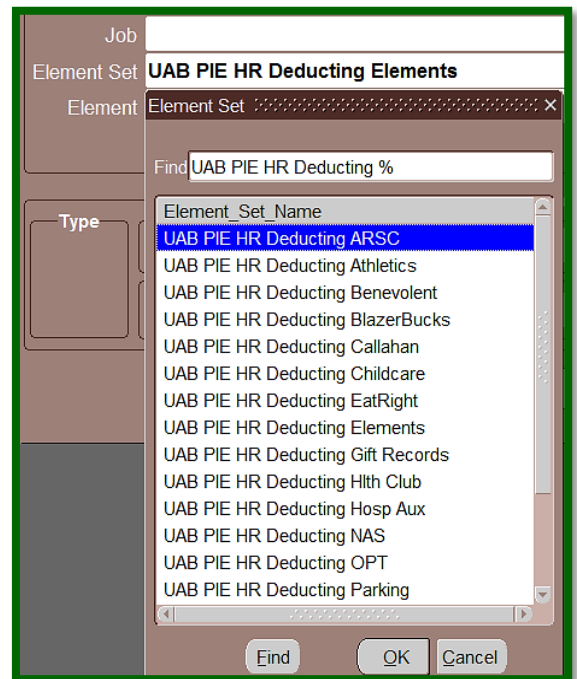
To further define the element set, select the *LOV* and a listing of element categories will appear. Select the *element set name* then select **OK**.

Using the **Element** parameter enables the requestor to view the specific elements that are associated with an **Element Set**. Select the *LOV* and all elements pertaining to the defined element set will appear. Select a specific *element* then select **OK**.
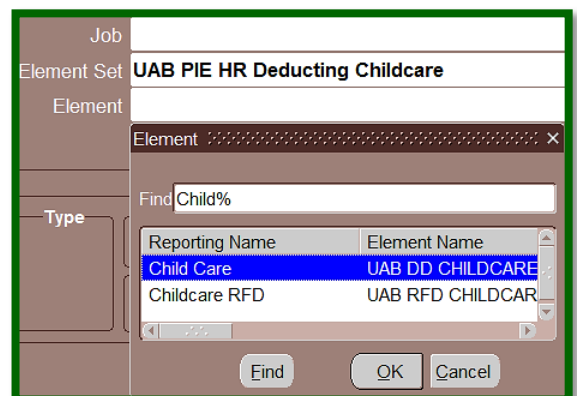
Updated 11-OCT-2017

To request only individuals with a specific payroll, use the **Payroll Type** parameter. Place the cursor in the field and the *LOV* activates. Click the *LOV* and all applicable payroll types will appear. Select the correct payroll type and select **OK**.
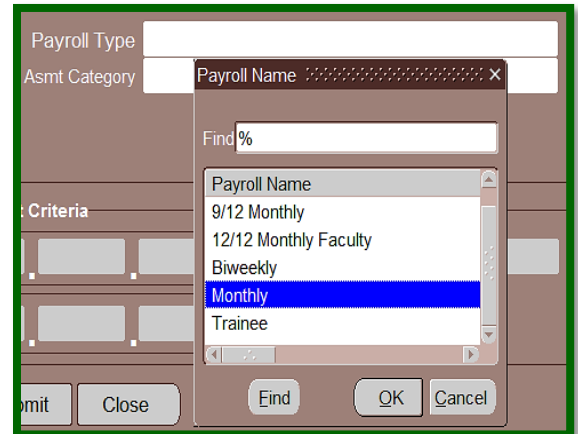
Use the **Assignment Category (Asmt Category)** parameter to limit report information to a specific employment category. Place the cursor in the field and the *LOV* activates. Click the *LOV* and all applicable employment categories will appear. Select the correct category and select **OK**.
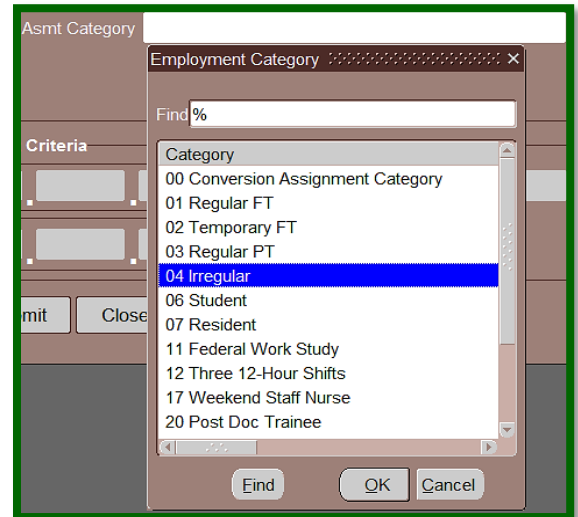
> When using multiple parameters to limit report content, it is important to remember the extract reads each parameter as an *"AND"* statement. All parameters must be *"TRUE"* for the information to display on the report.

After entering the necessary parameters, click *Submit*.

The *Note box* will inform the requestor that the report will be available upon completion in the **UAB Report Viewer**.

A *request id number* will also be included should the requester experience any problems accessing the extract.
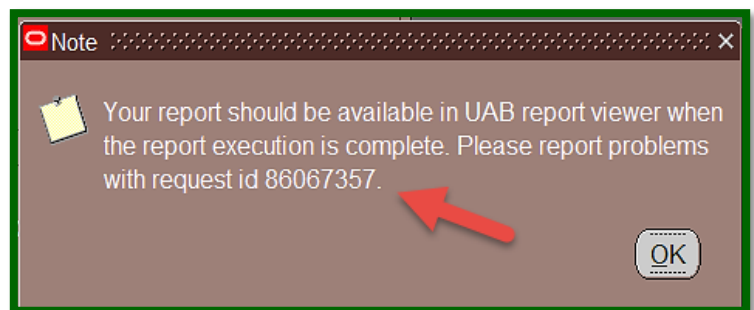
The requestor will receive an email with instructions to access the report.
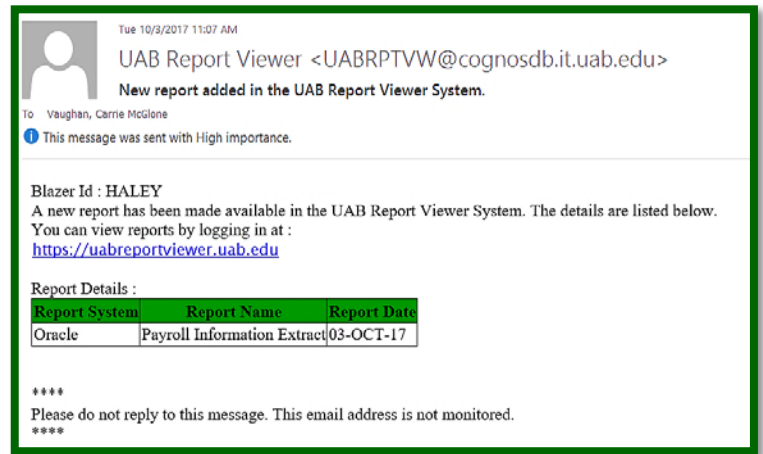
To access the report, the user must login to the **UAB Report Viewer**. The user may utilize the hyperlink provided in the email notification, or login by navigating to the Administrative Systems website at http://uab.edu/adminsys/ and clicking on the **UAB Report Viewer** button.

The PIE report may be accessed by clicking on the hyperlink under the **Report Name** column. A window similar to the one below will appear, select **Save As**.
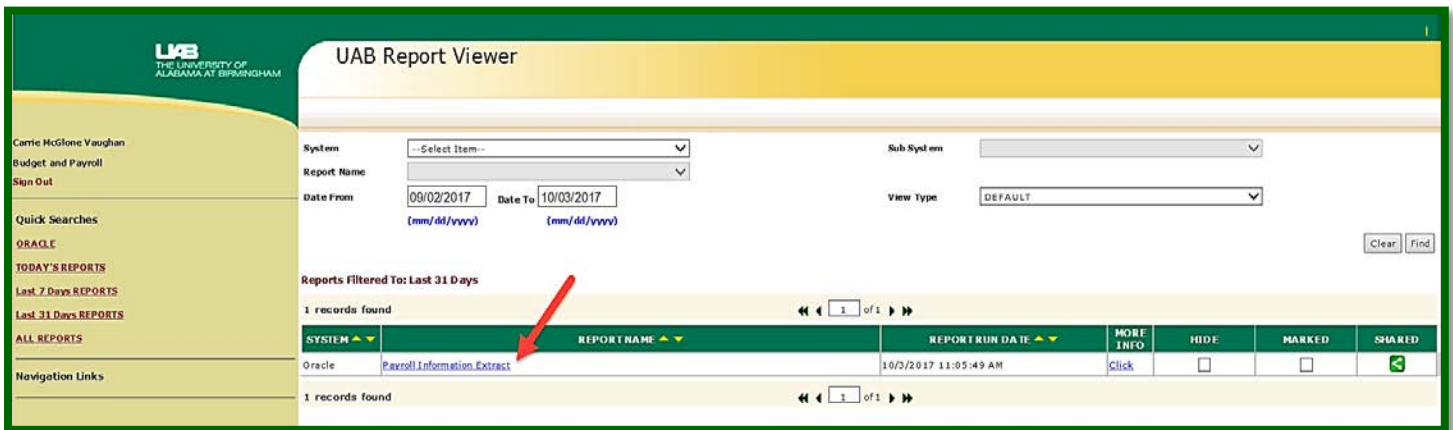
The **Save As** window will open with the File Name of *payroll_information_extract_id number*. The file will save as a Microsoft Excel Worksheet. The requestor should select the *appropriate file location*.
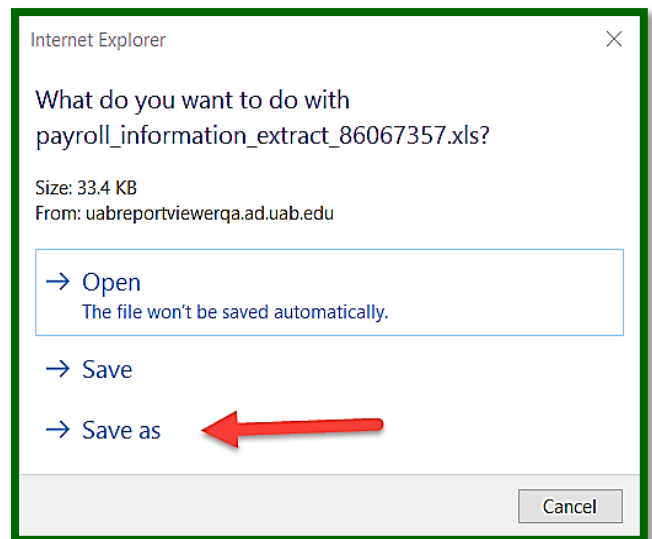
Updated 11-OCT-2017

Once the location has been selected, click **Save**.
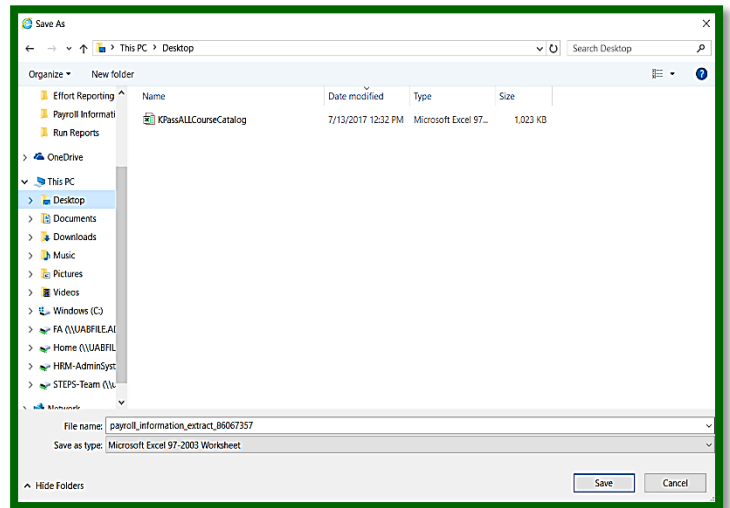
The *Download Status Box* will appear indicating that the download has completed. Select **Open**. The spreadsheet will launch.

Sample PIE Report

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