

## Measuring transaction activity

A number of helpful public queries have been created in the reporting instance of EFS. Go to MyU > Key Links > PeopleSoft > EFS/Finance – Reporting Only. Once you are logged into the reporting instance, go to Main Menu > Reporting Tools > Query > Query Manager (or Query Viewer). Then search for the query by name.

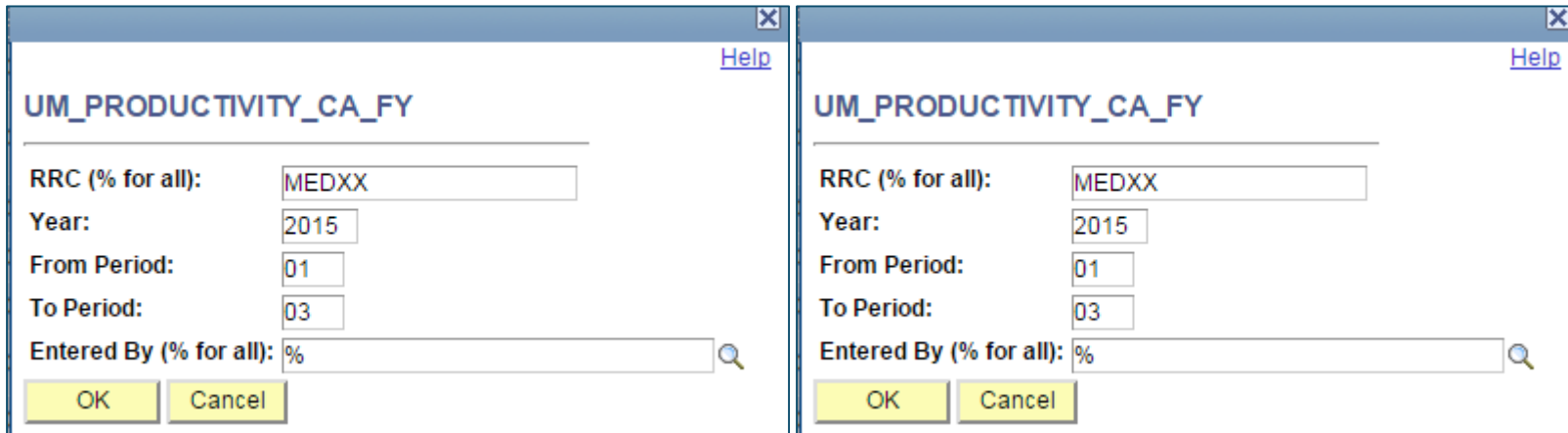
Query Name	Transaction type	Run parameters	Descriptions
UM_PRODUCTIVITY_BI_FY	Invoice	Billing Source (Cluster Number), date range/preparer, date range	The query returns invoice number, invoice line number, invoice type, biller number, user ID, name, date of invoice, month, fiscal year, DeptID, ZDeptID, RRC, and campus. Billing specialist doesn't tie to RRC so Billing Source (cluster) was used as a run parameter but in the returned data we have mapped the DeptID to the respective ZDeptID & RRC.
UM_PRODUCTIVITY_CA_FY	Cash Advance	Preparer, date range	The query returns cash advance number and status, the employee identification number and name, preparer EmplID and name, month, and fiscal year. Due to how cash advances are processed the DeptID, ZDeptID, RRC, and campus all default to central system-wide indicators.
UM_PRODUCTIVITY_ER_FY	Employee Reimbursement/ PCard (returned PCard transactions after 4/20/15)	RRC, date range/preparer, date range	The query returns employee expense report number, employee expense report line number, expense report status, preparer, name, month, fiscal year, DeptID, ZDeptID, RRC, and campus. To differentiate expense reports from PCARD transactions, 'P' for PCard expenses; 'R' for reimbursable (out of pocket) expenses. Note that 'N' for non-reimbursable expenses is no longer valid after 4/20/15.
UM_PRODUCTIVITY_JE_FY	Journal Entry	RRC, date range/preparer, date range	The query returns journal ID number, journal status, journal source, journal line number, preparer, name, month, fiscal year, DeptID, ZDeptID, RRC, and campus.
UM_PRODUCTIVITY_PO_FY	Purchase Order	RRC, date range/preparer, date range	The query returns purchase order number, type of PO, PO line number, requisition number, amount, account, status, origin, preparer, name, month, fiscal year, DeptID, ZDeptID, RRC, and campus.
UM_PRODUCTIVITY_REQ_FY	Requisition	RRC, date range/preparer, date range	The query returns requisition number, type of requisition, requisition line number, status, origin, preparer, name, month, fiscal year, DeptID, ZDeptID, RRC, and campus.

Query Name	Transaction type	Run parameters	Descriptions
UM_PRODUCTIVITY_TA_FY	Travel Authorization	RRC, date range/preparer, date range	The query returns travel authorization ID number, travel authorization line number, travel authorization status, preparer, name, month, fiscal year, DeptID, ZDeptID, RRC, and campus.
UM_PRODUCTIVITY_VCHR_FY	Voucher	RRC, date range/preparer, date range	The query returns voucher number, type of voucher, voucher line number, origin, preparer, name, month, fiscal year, DeptID, ZDeptID, RRC, and campus. This query takes a few minutes to run if generated for a large unit or large date range. Consider scheduling the query to run (for immediate) for better results.

## How to use the queries

The run parameters for each query are basically the same. The query is generated by either RRC (the five character code) or Preparer (user ID) and a date range.

- To return data for a specific RRC, enter the RRC code in the *RRC* field and in the *Entered By* field, use a % sign to return all user IDs.
- To return data for a specific user ID, enter a % sign in the *RRC* field and in the *Entered By* field enter the user ID. Be sure any letters in the user ID are capitalized (for example, if the ID is "antw003" it should be entered as "ANTW003").



The image shows two side-by-side screenshots of a web-based query input form for 'UM\_PRODUCTIVITY\_CA\_FY'. Both screenshots show the following fields:

- RRC (% for all):** MEDXX
- Year:** 2015
- From Period:** 01
- To Period:** 03
- Entered By (% for all):** %

At the bottom of each form are 'OK' and 'Cancel' buttons. The right screenshot includes a magnifying glass icon on the 'Entered By' field.

## How to use the data

There are many ways to review the data. Using Excel to create a count pivot on user IDs provides insight about people that perform activity in the specific RRC (central unit users may appear in the data for your RRC). Count pivots by month provide a glimpse into higher/lower document processing times.

Each query returns a count of transaction lines per transaction ID. If you want to pivot or total on distinct transactions, you will need to create a select distinct function (pre Excel 2013) or check the select distinct box in the pivot table options (Excel 2013).

## Sample data from the Expense Report query

Report ID	Report Status	Report Status Descr	Entered By	Entered By Name	Line	Year	Period	Unique Report Number
0000332611	PD	Paid	HBUMBAL	Hattie Bumbal	1	2014	1	1
0000332611	PD	Paid	HBUMBAL	Hattie Bumbal	2	2014	1	0
0000332611	PD	Paid	HBUMBAL	Hattie Bumbal	3	2014	1	0
0000346675	PD	Paid	PATE004	Linus Patel	1	2014	4	1
0000348459	PD	Paid	PATE004	Linus Patel	1	2014	4	1
0000356143	PD	Paid	PATE004	Linus Patel	1	2014	5	1
0000356143	PD	Paid	PATE004	Linus Patel	2	2014	5	0
0000367394	PD	Paid	PATE004	Linus Patel	1	2014	8	1
0000373344	PD	Paid	PATE004	Linus Patel	1	2014	9	1
0000388675	PD	Paid	PATE004	Linus Patel	1	2014	11	1
0000388675	PD	Paid	PATE004	Linus Patel	2	2014	11	0
0000388675	PD	Paid	PATE004	Linus Patel	3	2014	11	0
0000388675	PD	Paid	PATE004	Linus Patel	4	2014	11	0
0000388675	PD	Paid	PATE004	Linus Patel	5	2014	11	0
0000392402	PD	Paid	PATE004	Linus Patel	1	2014	12	1
0000392402	PD	Paid	PATE004	Linus Patel	2	2014	12	0
0000393890	PD	Paid	PATE004	Linus Patel	1	2014	12	1

Sample pivot tables using data from the Expense Report query

Employee Reimbursements		Sum of Unique Report Number		
Entered By	Department	Year		Grand Total
		2013	2014	
Linus Patel	Accounting Services		4	4
	Accounts Receivable/Billing		5	5
	Controller's Administration		10	10
	Disbursement Services		1	1
	EFS Customer Support		2	2
	EFS Module Support Team		9	9
	Purchasing Services		28	28
	Risk Management		9	9
	Sponsored Fin Reporting	4	14	18
	Treasury Acctg		11	11
	Linus Patel Total		4	93
Hattie Bumbal	Accounting Services	5	3	8
	Accounts Receivable/Billing	10	2	12
	Controller's Administration	17	1	18
	Disbursement Services	3	3	6
	EFS Customer Support	4	1	5
	EFS Module Support Team	14		14
	Inventory Services	5		5
	Purchasing Services	24	2	26
	Risk Management	8	1	9
	Sponsored Fin Reporting	8		8
	Treasury Acctg	6	1	7
Hattie Bumbal Total		104	14	118
Grand Total		108	107	225

Year	2014	Change year to view FY activity											
Sum of Unique Report Number	Period												Grand Total
Entered By	1	2	3	4	5	6	7	8	9	10	11	12	
Linus Patel			3	13	6	2	12	3	12	5	15	22	93
Hattie Bumbal	7	7											14
Grand Total	7	7	3	13	6	2	12	3	12	5	15	22	107