

INTRODUCTION TO REPORTS

REQUESTING REPORTS

OSPA produces a standard set of reports for each preliminary and final payroll run. It also produces special reports on a one-time, quarterly or annual basis. The OSPA Reference Manual, Report Descriptions include the frequency for each report. Also, see the OSPS Processing Calendar for specific dates: <u>http://oregon.gov/DAS/SCD/OSPS/processtools.shtml</u>

The following two screens affect the reports agencies receive. For additional information, see the OSPA Reference Manual, Screen Descriptions.

- PRPT OSPS Agency Report Selection The PRPT screen determines the following for a list of standard reports:
 - The reports the agency will receive in paper format
 - The reports they will receive in PDF format

The PRPT does not include all OSPA reports. Agencies will automatically receive electronic copies of the additional reports when they have an employee listed on the report.

Agencies should distribute the following reports to agency managers:

- B470CM OSPS Leave Accrual Detail Transaction Register Check Distribution Code Management
- XREF46D Payroll Register-OR ID Version

These are the only paper reports produced on an on-going basis. The PRPT will default to COPIES: 01 for these reports – agencies will receive one paper copy. An agency may request that OSPS change the default to 00 if the agency has another plan for giving managers a copy.

OSPA has edits that require agencies receive a PDF copy of the following reports:

- B470CM Leave Accrual Detail Transaction Register Check Distribution Code Management
- XREF43 Payroll Register Detail Alpha
- XREF46D Payroll Register –OR ID Version
- **PBAP Agency Table Payroll,** PAYROLL REPORT OPTIONS, A thru D control the sort order on designated reports. See the OSPA Reference Manual, Screen Descriptions, PBAP for possible values.

ELECTRONIC REPORTS

Agencies can now view OSPA reports in a PDF format on a secure website.

The reports will generally be available by 7:00 am the day after each payroll run. There will be a separate listing for the following:

- Preliminary run 1
- Final run 1

Questions? Contact the OSPS Help Desk introrprt.doc



- Preliminary run 2
- Final run 2
- Leave Accrual
- Quarterly Yearly
- Yearly W2

With some exceptions, each set will remain on the web site until the next equivalent run:

- OSPS will maintain the current plus four years of the Yearly W-2's on the website
- OSPA only produces the E397-120-01 Non-leave Time Recorded on a Holiday report in months with an official holiday. The last report will remain with the current Preliminary Run 1 reports until the next official holiday.

Except for the Yearly W-2's, agencies will be responsible for storing the reports in a secure local environment to meet their business and retention requirements. Do not store the Yearly W-2's locally. They have an Information Asset Classification 4 – Critical. They must be stored in a secure, encrypted environment.

OSPS will set-up the requested security for each staff member. To request access to the secure website, complete, sign and forward the OSPS.99.30 Electronic Report Access Request – OSPS form to OSPS.

This section includes the following:

- Accessing the PDF Reports Website
- Archiving PDF Reports

ACCESSING THE PDF REPORTS WEBSITE

	Action	More
1.	Go to PDF Reports Website at https://columbia.das.state.or.us:3045/cics/pw60/ospsw060 . The following screen will display:	



OSPA Reference Manual

Introduction to Reports

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3. The following menu screen will display:



Introduction to Reports

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99B3701 B370-OSPSPayrollCalculateControls	
Main Menu	



	Action	More
5.	To view a specific report from the list, click on that report. The report will display in PDF format.	
	The normal PDF functionality applies to these reports. For example, you can use Find to search for a specific employee or kind of record.	
6.	When you are finished, there is not a log-off process. Simply close the web session.	

ARCHIVING PDF REPORTS

Each set of reports will remain on the web site until the next equivalent run. For example, the reports for July preliminary run 1 will remain on the web until August preliminary run 1. Reports for the first quarter will remain until second quarter reports run. E397-120-01 Non-leave Time Recorded on a Holiday report will remain until the next month with an official holiday.

The next run that produces the equivalent report will override the existing reports. Archive or save your reports to local storage before the next time OSPA will produce the report.

Payroll reports may contain Information Asset Classification Level 3 or Level 4 information (see DAS Statewide Policy 107-004-050 Information Asset Classification, <u>http://oregon.gov/DAS/OP/docs/policy/state/107-004-050.pdf</u>). The first page of each report gives its classification level.

The local storage you establish should meet the following criteria:

- Only be available to agency staff members who have security for OSPA or already have access to OSPA reports or agency payroll information
- Be part of a planned and controlled backup and storage protocol that ensures continuing access for the agency's business and retention requirements. Resources include:
 - OAR Chapter 166 Division 300 State General Records Retention schedules, <u>http://arcweb.sos.state.or.us/rules/OARS_100/OAR_166/166_300.html</u>
 - Your agency's special schedules, <u>http://arcweb.sos.state.or.us/recmgmt/sched/special/state.html</u>

NOTE: The PDF W-2's contain Information Asset Classification Level 4 information. DO NOT store the PDF W-2's to local storage unless the location has equivalent security to the DAS mainframe – two layers of security and encryption. OSPS will retain the current year plus four prior years on the secure web site.

	Action	More
1.	Access the reports website as you normally would (see above).	
2.	Click on the run you wish to save.	



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OSPS Reports Available in PDF - Windows Internet Explorer O O V E https://columbia.das.state.or.us.3025/cics/p055/ospsw055/MNP1. Eile Edit View Fgvorites Tools Help	itm 💌 🔒	- 5 X 47 X Live Search	For this example, this user clicked on Preliminary Run 1 reports.
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http://columbia.das.tate.or.us.3025/cisz.p/0555/05P91/P39511201.PDF	
 c. When you have highlighted all of the report title, press [CTRL] + C (copy). The report title will remain in the clipboard until you are ready to paste it. 	
5. To save the report to your LAN:a. Hold your mouse pointer over the report name	
b. Hold down the right mouse button. A menu will display	



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c. Click on Save Target As. The Save As dialog box will display.

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d. Designate the LAN directory and folder	
 The application will suggest a document name. If you copied the report title in the step above, press [CTRL] + [V] to paste the report title in the File name field. If your agency has other naming conventions, type in the File name. 	
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e. Click [SAVE]. The Download Complete box will display.	



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f. You can choose to Open, Open Folder or Close. Select [CLOSE] to return to the report list.	
7. Continue this process until you have copied all of the reports.	
8. After you have copied all of the reports to your agency's LAN, compare what you have copied to the reports list on the web to make sure you have copied all of them.	

CONVENTIONS USED IN THE REPORTS SECTION

Some reports have OSPS as part of the report number or the report title. The report descriptions are in alphabetical order by title, omitting the OSPS reference.

CONFIDENTIALITY OF REPORT INFORMATION

Payroll reports may contain Information Asset Classification Level 3 or Level 4 data, see DAS Statewide Policy 107-004-050 Information Asset Classification, <u>http://oregon.gov/DAS/OP/docs/policy/state/107-004-050.pdf</u>. The first page of each PDF report includes the Information Asset Classification Level.

OSPS recommends that you periodically assess your daily use, storage and destruction of all payroll reports to ensure a secure environment. Unless you can replicate the secure reports website with



firewalls, two levels of identification and encryption, do not store records with Level 4 classification locally. This includes W-2's; OSPS will maintain the current plus the four prior years on the website.

RECORDS RETENTION

For statewide retention schedules, see OAR Chapter 166, Division 300, <u>http://arcweb.sos.state.or.us/recmgmt/sched/index.html</u>

For agency specific retention schedules, see http://arcweb.sos.state.or.us/recmgmt/sched/special/state.html

REVISION HISTORY

Date	Rev. No.	Modification
11/08/06	1.0	Original
08/12/09	1.1	WR #3547, agencies must receive one copy of XREF46D
08/04/10	1.2	WR #3678 and 3657, PDF reports
03/01/11	1.3	WR #3718, OSPS only access to COPIES, only 00 or 01 allowed in COPIES, required PDF reports
05/09/11	1.4	OSPS.99.30 replaced OSPS.99.20 and OSPS.99.21; clarify timing for E397-120-01 report