Banner and Cognos OA Review Tracking in PWAREVW

User Guide v. 1.0
April 30, 2024

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Overview

Our goal is to standardize and improve how we see Officer of Administration (OA) review schedules. It is the responsibility of VPs and Dean's offices to ensure departments enter and keep review completion dates updated in the Banner screen PWAREVW.

- https://hr.uoregon.edu/oa-performance-management

University HR will be using these dates as the official source to check OA review completion at UO.

Here are the types of OA reviews we keep track of in PWAREVW:

- OA trial service
- OA annual performance

This guide will show you how to track these in Banner and how to get reports from Cognos for reviews completed and those missing a completed review.

Support Contact

If you have questions or need help, please reach out to University Human Resources Operations at hrops@uoregon.edu.

Banner Data Entry

Banner UO Employee Review PWAREVW Access

Here's how you can get access to the Banner page PWAREVW to manage review dates. Before requesting access check with your VP or Dean's office or shared service contacts to verify you should be recording OA reviews in Banner.

If you request access and don't get a response within two weeks of completing these steps, please check back using the contact details provided in the form (usually at baosecurity@uoregon.edu).

1. Visit https://forms.uoregon.edu/ and log in.
2. Find the "Banner" section of the Business Affairs forms, either scroll down or use the "Choose a Category" dropdown.
3. Fill out the "FIS/HRIS/AR User Profile" form:
    - The fields:
        - For the **'Purpose'**, select "Add FIS/HR/AR job functions".
        - Complete the **Employee Info** section.
        - Under **HRIS Job Functions**, choose "Other HR Job Function" and enter 'PWAREVW' in the text box.
        - Click **SAVE**
    - In the **Signature Block**, edit the Dean/Director section to add the correct approver.
    - Click on **Send Document**
    - **Sign** the document. It will go to your approver next.
    - You'll know it's fully submitted when you see a "**Signature Complete**" message.
4. Once approved, you'll receive a "Signing complete" email from forms@uoregon.edu.
5. Finally, Banner Security will get the form and work with HR to approve your access.
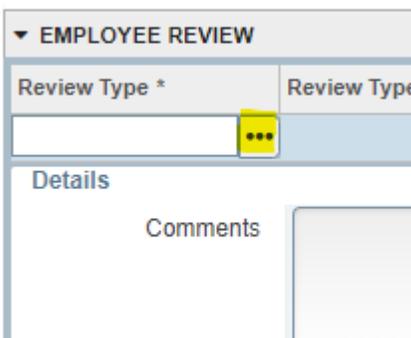
Using PWAREVW

Entering a New Review

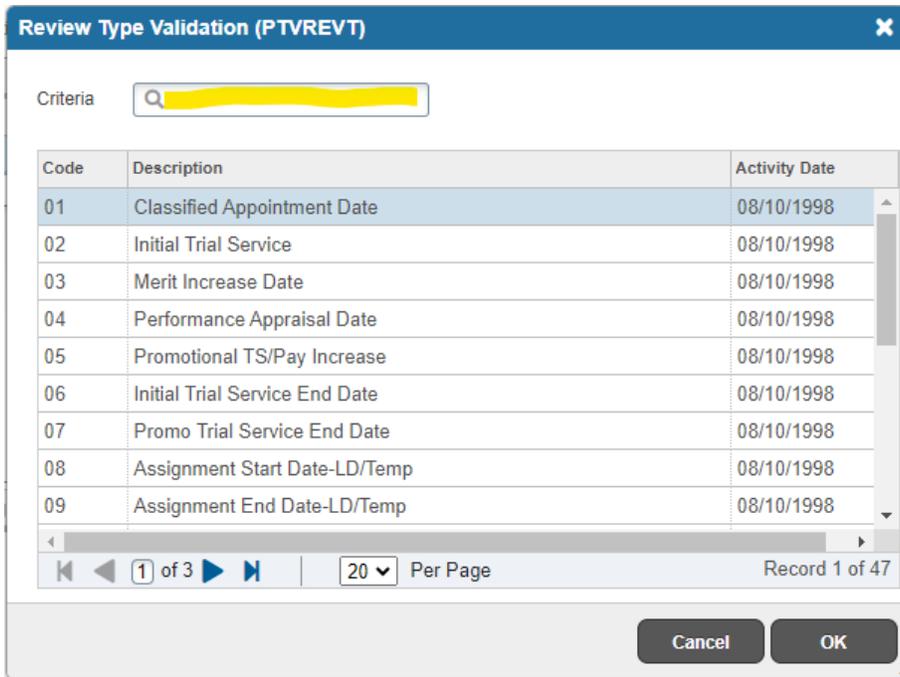Follow these steps to add and update reviews in Banner:

1. **Log into Banner.**
2. **Go to the PWAREVW page.**
3. **Find the OA:**
    a. In the ID field, enter the OA's 95#.
    b. If you don't know it, you can search for it from the ID field, just like in other Banner screens.
4. **Check the Position:**
    a. The primary position will automatically fill in the Position and Suffix fields.
    b. ***Ensure this is the correct position for the OA.*** Some employees have two positions, so double check that it is the correct position.
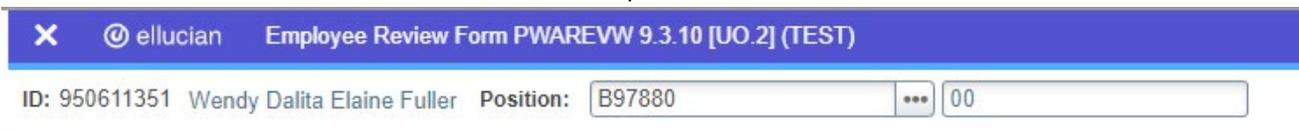
5. **Click 'Go':**
    a. Here, you'll enter completed reviews.
    b. Refer to the OA Performance Management guidance https://hr.uoregon.edu/oa-performance-management
6. **Adding a Review:**
    a. If there are previous reviews listed, click "Insert" or if no previous reviews listed click on "…"
        •   Or, if you know the review type code, you can enter it directly.

    b. In the popup, you can search for the review type in the Criteria search field.

Review Type Validation (PTVREVT)

Criteria Q ▭

Code	Description	Activity Date
01	Classified Appointment Date	08/10/1998
02	Initial Trial Service	08/10/1998
03	Merit Increase Date	08/10/1998
04	Performance Appraisal Date	08/10/1998
05	Promotional TS/Pay Increase	08/10/1998
06	Initial Trial Service End Date	08/10/1998
07	Promo Trial Service End Date	08/10/1998
08	Assignment Start Date-LD/Temp	08/10/1998
09	Assignment End Date-LD/Temp	08/10/1998

|◀ ◀ 1 of 3 ▶ ▶| 20 ▼   Per Page   Record 1 of 47

Cancel   OK

      c. Select the review type and click OK

Review Type Validation (PTVREVT)

Criteria Q r1

Code	Description	Activity Date
R1	Annual Review	07/20/2018

|◀ ◀ 1 of 1 ▶ ▶| 10 ▼   Per Page   Record 1 of 1

Cancel   OK
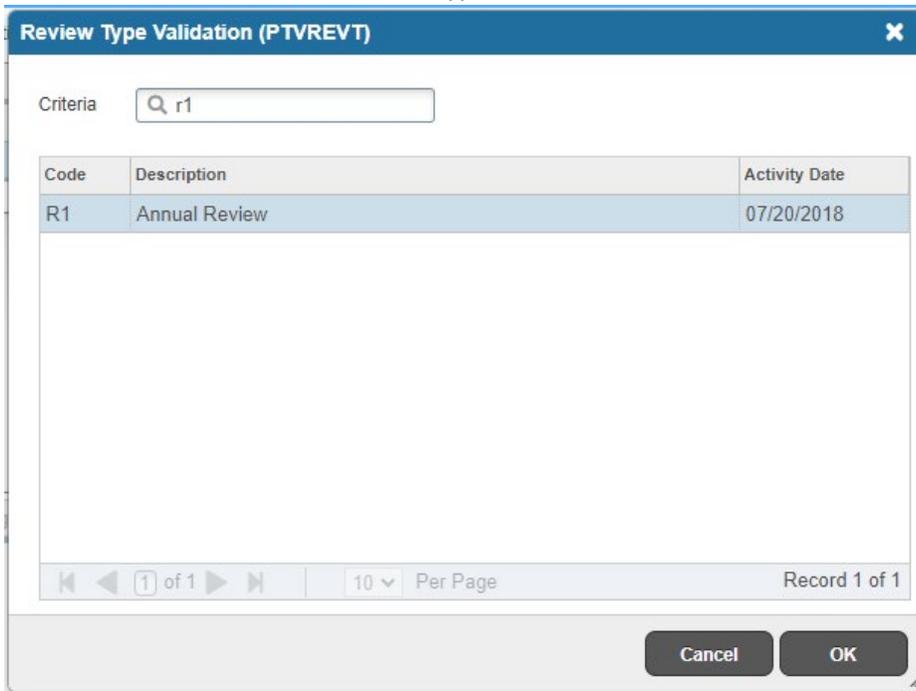
7. **Select the Right Review Type:**
   a. Be careful to use only the codes listed in the table below. See also the "Review Type Conventions" section.
      - Avoid similar-sounding codes that don't match your needs.

Code	Definition
R1	Annual Review
40	Trial Service Perf Appr Date

b. University HR Operations Manages the entry of Initial Trial Service begin and end dates only. Units are responsible for recording Annual Reviews and if applicable a Trial Service review date. These codes will appear in the record as follows:

Code	Definition
02	Initial Trial Service
06	Initial Trial Service End Date

8. **Enter the Due Date: This can be the same as the Completed Date**

a. Note: This date is for data entry and doesn't appear in reports.

9. **Tick the "Completed" box to show a review is finished**

a. The Completed Date field will automatically set to today's date. You should change this to the actual date the review was completed (the date it is signed by the employee).

10. **Use Comments Wisely (comments are not required):**
    a. Use the Comments field for notes about non-standard schedules or other useful info.
    b. Keep comments clear, concise, and appropriate for general viewing, as they may end up in Cognos reports. **Do not record results of a review.**
    c. If you add a comment, add your DuckID and the date of your comment for reference, like "–jsmith 8/14/2027".
    d. A couple examples:
       • "Trial Service Extended from MM/DD/YYYY to MM/DD/YYYY. -dduck 11/30/2023"
       • "No annual review in 2022 due to supervisor turnover, this review covers 2022 and 2023. –jsmith 8/14/2024"
11. **Rating: DO NOT USE**

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12. **Reviewer ID:**
    a. Select the supervisor or individual who performed the appraisal.
13. **Save Your Work:**
    a. Use the F10 key or the Save button in the screen's lower right corner to save changes.
14. **Auditing Your Work**:
    a. Set a reminder on your calendar to run the OA Review Completion Report the next day (the data is sent from Banner to the data warehouse overnight).
    b. Verify that all information on the report is correct.

Editing or Deleting a Review

Follow these steps if you need to make corrections.

1. **Log into Banner.**
2. **Go to UO Employee Review PWAREVW**
3. **Identify the OA:**
    a. Enter the OA's 95# in the ID field.
    b. If you don't know the 95#, you can search for it in the ID field, like in other Banner screens.
4. **Verify the Position:**
    a. The primary position will automatically appear in the Position and Suffix fields.
    b. Ensure it's the correct position and not a faculty or classified position.
5. **Click 'Go'.**
6. **Deleting a Review:**
    a. To remove a review, select the row and delete the record.

| ID: 950611351 Wendy Dalita Elaine Fuller   Position: | B97880 | ••• | 00 | | | | | |

						⚙ Settings	🞢 Insert	🞨 Delete
EMPLOYEE REVIEW								
Review Type *	Review Type Description	Due Date *	Completed	Completed Date	Rating	Reviewer ID	Reviewer ID Descript
R1	Annual Review	04/18/2024	☑	04/18/2024			
Details								

7. **Editing a Review:**
    a. Edit date fields as appropriate.
8. **Comments Field Usage:**
    a. Add or update the Comments field if you make a change to the review record.
        i. **Remember, these comments might show up in Cognos reports.**
        ii. Keep comments clear and suitable for a general audience.
        iii. **Avoid including personal details or review results.** Words like "childbirth" or "negative" are inappropriate.
        iv. Good example: "Postponing review to 2025 approved 5/12/2024. – jsmith"
        v. Add your DuckID and the date, like "–jsmith 8/14/2024".
9. **Rating: DO NOT USE**
10. **Handling Completed Reviews:**
    a. If a review is marked Complete, **don't change** the Completed Date or uncheck the Completed box unless you are explicitly told by the VP or Dean to correct a record.
11. **Save Your Work:**
    a. Use the F10 key or the Save button in the screen's lower right corner to save your updates.

Review Type Conventions

Understand when and how to use each review type in PWAREVW:

1. **R1 - Annual Review**
   a. **Usage:** For all annual reviews of OAs.
   b. **Responsibility:** Departments enter and update; Departments mark complete.
2. **02 - Initial Trial Service**
   a. **Usage**: For OAs new to the role, this is the job start date.
   b. **Responsibility**: University HR Operations manages the entry of Initial Trial Service begin dates.
3. **06 - Initial Trial Service End Date**
   a. **Usage**: For OAs new to the role.
   b. **Responsibility**: University HR Operations manages the entry of Initial Trial Service end dates.
4. **40 - Trial Service Perf Appr Date**
   a. **Usage**: Optional review for OAs new to the role, six months after the start date.
   b. **Responsibility**: Departments enter and mark complete.

Special Situations

If something's not clear or you have specific questions, feel free to reach out to HRops@uoregon.edu.

New OAs

When there is a new OA hired, you can't add their review data in PWAREVW until their position is set up in Banner.

Cognos Reporting

Getting Access to Cognos

If don't have Cognos access, you'll need to request access to get started with the reports.

For more information visit https://idr.uoregon.edu/getting-access and submit a access form: https://service.uoregon.edu/TDClient/Requests/TicketRequests/NewForm?ID=gpA1hTeuztQ_

For these purposes, you will request "IDR (Cognos) Core Data Report User" access.

Reports

In Cognos, there is one report that uses data from PWAREVW:
1. **OA Review Completion Report**

How to Use the OA Review Completion Report

This report is for checking all completed OA reviews within a certain year or years. Here's how to run it:
1. **Log In**: Start by logging into Cognos https://cognos.uoregon.edu/.
2. **Find the Report**: Head over to HR Reports and select OA Review Completion Report.
3. **Select Fiscal Year of Review**: Choose one or more years you're interested in. Remember, July 1st is the start of the "Current Fiscal Year".

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4. **Choose Review Types**: You can select specific review types or go for "Select all" or "Deselect All" if you want a broader view.
5. **Pick Your Org Level**: Choose the **Org Level 3** you want to look at. CAS and College of Design can also pick an **Org Level 4**.
6. **Timesheet Org (Optional)**: Enter this if you need to.
7. **Review Complete (Optional)**: Select "Y" or "N" to filter based on whether the review is complete.
8. **View Your Data**: Hit Finish and check out your results.
9. **Exporting Data**: Want to keep a copy? You can export the data to Excel or other formats using the Run drop-down menu.
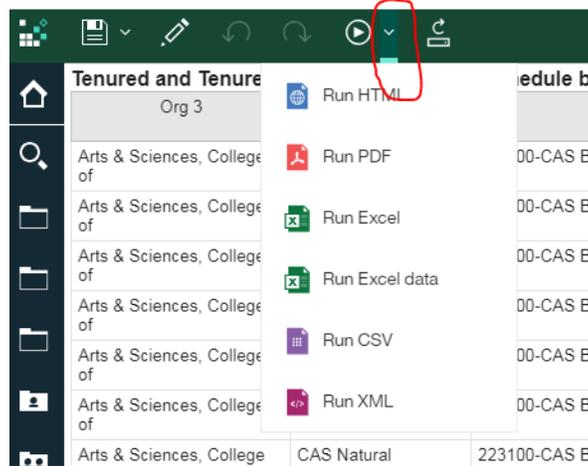
10. **Resetting the Report**: To start over or change parameters, just click the Run button.

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