Payroll / HR Spooktacular

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Presenter Information

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What is Personnel Downloader?
What it really is.

- Personnel Report Tool
- Allows you to select data elements from personnel screens – MA, W4, CL, EA, etc.
- Creates an MS Excel Spreadsheet
How does it Work?

• Select fields from a list (Go “field shopping”!)
• Can use filters or criteria on each field to limit data returned
• Can place fields in any order
• Can use preset selection criteria that have been saved (Like a collection of “shopping list”)
• You can save your selection criteria to use again (Make your own “shopping list”)
Best way to learn

1. Look for and try out existing presets first
2. Modify existing preset field selection criteria
3. Start from scratch
Important Vocabulary

• **Download Maintenance**
  – Where you save your preset collection criteria, and manage field selections for presets

• **Data Options**
  – Where the files you created are saved and waiting to be downloaded. An important point is that these files do not auto-refresh. (It is similar to Print Manager for reports.)

• **Category Maintenance**
  – A way to organize, group your preset selection criteria files.
Where is the Personnel Downloader?
Download Definition Tab
Download Definition Tab (cont.)
Download Definition Tab (cont.)
### Data Tab

#### Data file information retrieved:

<table>
<thead>
<tr>
<th>Data Subset</th>
<th>Include all files</th>
<th>Description</th>
<th>Records</th>
<th>Owner</th>
<th>Category</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>DATA03</td>
<td></td>
<td>CDEA POL TEST2</td>
<td>1,698</td>
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<td>EMP@</td>
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<tr>
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<td>District</td>
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<td>EMP@</td>
<td>District</td>
</tr>
<tr>
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<td></td>
<td>AETBAL</td>
<td>58</td>
<td>CDEA</td>
<td>EMP@</td>
<td>District</td>
</tr>
</tbody>
</table>

**PDL010**: View - Any file. Update - Only your own files.  
**Yr:2015 Dist:90 Site:0**  
10/05/2014 3:51 PM
### Categories Tab

The Categories Tab in the Personnel Downloader shows the available categories for downloading data. The categories include:

- SENIORIT: SENIORITY REPORTS
- EMPL TYPE: EMPLOYEE TYPE REPORT
- QSS: CREATED BY QSS
- ALL EMPL: ALL EMPLOYEES W/JOE CLASS, FTE, EMP TYPE
- PR AUDIT: PAYROLL AUDIT, RET CODE, STAT DED, AC-P-C
- STF REC: STAFF RECOGNITION AUDIT
- BOARDRT: BOARD REPORT
- EMPLISTS: EMPLOYEE LISTS
- OPENTRANS: OPEN TRANSFER ADDRESSES CTA
- HEADSTR: HEAD START EMPLOYEES
- CECMGMT: CE MANAGEMENT & SUPERVISORS
- TB REP: TB TEST REPORT
- SEACOUNT: SEA COUNT FOR WORK YR DESIGNATION MAY 1
- SUBLIST: SUBSTITUTES
- OT/PT: OT/PT WO FORM FOR MAY 1
- AA REP: AA REPORT
- TERM EMP: TERMINATED EMPLOYEES
- STEPFLCM: STEP PLACEMENT REPORT
- LIFE INS: LIFE INSURANCE CENSUS
- SUB TERM: SUBSTITUTE TERMINATED LIST
- SUB RA: SUBSTITUTES ON CALL REAS ASSUR LETTERS

The tab also allows for viewing and updating files, with options for year (Yr:2015), distribution (Dist:90), and site (Site:0). The current date is 10/6/2014, and the time is 3:56 PM.
Personnel Downloader
Process Overview

Categories Downloads → Submit Download Definition → Build/View Data files → Data files

Maintain Categories

Maintain Download Definitions

QSS PERPAY DB

Download Data files

Analyze & Manipulate Data Using PC Tools
Personnel Downloader Structure

Personnel Downloader

Category Maintenance

Downloads

Data Options

Select

New

Change

Delete Data

Submit Download

Download to PC

Delete Data

View Data file

Maintain District Categories

Inspect Global Categories

Name & Category

Global Selections

Custom Selections
Personnel Downloader Structure

First Step

Second Step

Data Options
- Download to PC
- View Data file
- Custom Selections
- Global Selections
- Name & Category
- New
- Change
- Delete
- Submit
- Download

Personnel Downloader
- Category Maintenance
- Inspect Global Categories
- Maintain District Categories
- Select
- Delete Data
- Delete Download
- Download to PC
Example #1: Mail Merge for TB Letter

- Select **TBMM** and click on **Open Download Definition** icon
Example 1: Download/Global Settings Screen

- Click the **Submit Job to Create Data File** icon
  - if you do not need to modify the preset
Example 1: Field Selection Screen

- Click the **Submit Job to Create Data File** icon
Create the Download File (cont.)

- Enter a name for the **Data File**
- Click the **Submit Job to Create Data File** icon
Create the Download File (cont.)

- Click OK
Download File into Excel

- Click on Data tab
Download File into Excel (cont.)

- Locate your **QCC USERID** from the **Owner** pull-down
- Click **Get List of Data Files** button
Download File into Excel (cont.)

- Locate and click to select the new Data file
Download File into Excel (cont.)

- Click on "sunny" Excel Wizard icon on
Download File into Excel (cont.)

- Click on **Open**
- **DO NOT** change the filename
Download File into Excel (cont.)

- Click Next
Download File into Excel (cont.)

- Select **Comma** delimiter and click **Next**
Download File into Excel (cont.)

- Select all columns: press **<SHIFT>** and click on last column
Download File into Excel (cont.)

- Select **Text** radio button
- Click **Finish**
Excel File Created

- Use Excel to format your file
Example 2: Compare Date Terminated with Date Paid

- Select **TERMDP** and click on **Open Download Definition** icon.
Example 2: Download/Global Settings Screen

- Click on **Submit Report/Job** icon
Example 2: Field Selection Screen

<table>
<thead>
<tr>
<th>Field</th>
<th>Len</th>
<th>Type</th>
<th>Out</th>
<th>OP</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bargaining unit</td>
<td>02</td>
<td>Num</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barg unit name</td>
<td>30</td>
<td>Char</td>
<td>Yes</td>
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<tr>
<td>Employee type</td>
<td>02</td>
<td>Char</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emp type name</td>
<td>30</td>
<td>Char</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Emp name, last</td>
<td>20</td>
<td>Char</td>
<td>Yes</td>
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<tr>
<td>Emp name, first</td>
<td>12</td>
<td>Char</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Termination date</td>
<td>08</td>
<td>Date</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last date paid</td>
<td>08</td>
<td>Date</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Click on Submit Report/Job icon
Create Data for Download

• Type your download data name
Create Data for Download (cont.)

- Click on **Submit Report/Job** icon
Create Data for Download (cont.)

- Click OK
Download Data into Excel

- Click on **Data** tab
- Locate your **QCC USERID** from the **Owner** pull-down
- Click **Get List of Data Files** button
- Select File to download
- Click the “**sunny**” Excel Wizard icon
Download Data into Excel (cont.)

- Click **Open**
- DO NOT change the filename
Download Data into Excel (cont.)

• **Click** Next
Download Data into Excel (cont.)

- Select **Comma** delimited and **Next**
Download Data into Excel (cont.)

- Select the **1st five columns**
- Click the **Text** radio button
Download Data into Excel (cont.)

- Select the date columns
- Click the **Date** format radio button
- Click **Finish**
Download Data into Excel (cont.)

- Use Excel to format your file
Using Selection Rules

- Filter the data you download using **operators**
- Have Personnel Downloader only give you a specific subgroup of data matching the **rule/operator**
- Eliminate some extra work in Excel
Using Selection Rules (cont.)

The following **operators** have you type one value in the dialog box that displays in the From column of the grid:

- **EQ for equals**, such as pay-loc 1 equals 3020 to only select employees with 3020 on check sort on W4 screen.
- **NE for not equals**, such as site not equals 1039 to select employees assigned to any site other than 1039.
- **GT for greater than**, such as hire date greater than 12/31/2013 to select employees hired after December 31, 2013 (2014 or later).
- **LT for less than**, such as last name less than G to select employees with last names starting with A through F.
- **GE for greater than or equal to**, such as termination date greater than or equal to 07/01/2014 to select employees terminated on July 1, 2014 or later.
- **LE for less than or equal to**, such as a hire date less than or equal to 12/31/2013 to select employees hired in 2013 or earlier.
The following operators have From and To boxes for the start and end of a range.

- **IB** for in between the start and end of the range, such as a hire date with a From date of 09/01/2014 and a To date of 09/30/2014 to select employees hired during September.
- **NI** for not in between the start and end of the range, such as Federal exemptions with a From number of 0 and a To number of 7 to select employees who are claiming 8 or more exemption credits.
Example of Using Selection Rules

- Select **NEWEMP** and click **Open** **Download** **Definition**
Example of Using Selection Rules (cont.)

- What are we going to get out?
Example of Using Selection Rules (cont.)

- We will get employees that meet all these criteria:
  - Employee's with last names A - I
  - Employees hired between 07/01/2014 and 08/31/2014
  - Employees with Pay code of 02, Classified Employees
Example of Using Selection Rules (cont.)

• Let’s look at the download in Excel
• In this example, we downloaded data for 5 new Classified employees hired between 7/1 and 8/31 with last names from A - I
Going forward...

• Try out some existing presets
• Modify field selection criteria on presets to fit your needs
• Create your own presets from scratch