### Payroll / HR Spooktacular Thursday, October 30, 2014



# Santa Clara County $\stackrel{O}{=}$ Office of Education

# QCC Employee Lists

October 30, 2014

### **Presenter Information**

# **Cindy Patterson**

Manager Application Support Santa Clara County Office of Education Cindy\_Patterson@sccoe.org (408) 453-6726



### Purpose

- Understand new Grid Settings and how they can be used
- Ready to use employee lists
- More familiar with settings in employee maintenance







### **Employee Maintenance Window**



### Navigation

- Save and find is the quickest way to move from one employee to another
- Avoids rebuilding screen
- Avoids rebuilding validation lists

### **CTRL-F10**





### PR Example

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### New Grid Settings for Employee Maintenance

- Add columns to grid
- Remove columns from grid
- Rename column Headers



### **New Configuration Option**

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#### Available Additional Fields

#### 🖌 Include 📑 Include All

	Description	Default Header	Custom Header	Action
•	Employee Birth Date	Birth Date	Birth Date	Include
	Employee Hire Date	Hire Date	Hire Date	Include
	Employee Rehire Date	Rehire Date	Rehire Date	Include
	Employee Anniversary Base Date	Ann Base Date	Ann Base Date	Include
	Employee Longevity Base Date	Long Base Date	Long Base Date	Include
	Employee Original Hire Date	Orig Hire Date	Orig Hire Date	Include
	Employee Fingerprint Date	Fingerprint Date	Fingerprint Date	Include
	Employee Seniority Date	Seniority Date	Seniority Date	Include
	Employee Previous Sen Date	Prev Sen Date	Prev Sen Date	Include
	Employee Group Code	GC	GC	Include
	Employee Home Phone Number	Home Phone	Home Phone	Include
	Employee Ok to Rehire	OR	OR	Include
	Employee Ok to Pay	OP	OP	Include
	Employee Pay Code	PC	PC	Include
	Employee Pay Schedule	W4/PS	W4/PS	Include
	Employee Retirement System	RS	RS	Include
	Employee Stat. Ded Profile	W4/SDP	W4/SDP	Include
	Employee Deferred Pay Option	DPO	DPO	Include
	Employee Fed. Marital/Exemp.	Fed.M	Fed.M	Include
	Employee State Marital/Exemp.	Sta.M	Sta.M	Include
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Work Phone	Work Phone	Work Phone	1	Default
Employee Evaluation Due Date	Eval Due Date	Eval Due Date	<b>V</b>	Exclude
Gender	G	G		Default
Employee Pay Location	PL	PL		Exclude
Employee Control Group	CG	CG	V	Exclude
Site	Site	Site	<b>V</b>	Default
Employee Type	Ту	Ту	V	Default
Bargaining Unit	BU	BU		Default
Report Code	RC	RC	V	Default
Leave Group	LG	LG		Default
Termination Date	Terminated	Terminated		Default
Employee Work E-Mail	Work E-mail	Work E-mail		Exclude



### **Columns Have Changed**

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	Employee Pay Schedule	W4/PS	W4/PS	Include					
	Employee Retirement System	RS	RS	Include					
	Employee Stat. Ded Profile	W4/SDP	W4/SDP	Include					
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	Employee Hire Date	Hire Date	Hire Date	Include
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	Employee Anniversary Base Date	Ann Base Date	Ann Base Date	Include
	Employee Longevity Base Date	Long Base Date	Long Base Date	Include
	Employee Original Hire Date	Orig Hire Date	Orig Hire Date	Include
	Employee Fingerprint Date	Fingerprint Date	Fingerprint Date	Include
	Employee Seniority Date	Seniority Date	Seniority Date	Include
	Employee Previous Sen Date	Prev Sen Date	Prev Sen Date	Include
	Employee Group Code	GC	GC	Include
	Employee Home Phone Number	Home Phone	Home Phone	Include
	Employee Ok to Rehire	OR	OR	Include
	Employee Ok to Pay	OP	OP	Include
	Employee Pay Code	PC	PC	Include
	Employee Pay Schedule	W4/PS	W4/PS	Include
	Employee Retirement System	RS	RS	Include
	Employee Stat. Ded Profile	W4/SDP	W4/SDP	Include
	Employee Deferred Pay Option	DPO	DPO	Include
	Employee Fed. Marital/Exemp.	Fed.M	Fed.M	Include
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Description	Default Header	Custom Header	Display	Action
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Employee Evaluation Due Date	Eval Due Date	Eval Due Date	<b>V</b>	Exclude
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Employee Pay Location	PL	PL		Exclude
Employee Control Group	CG	CG	V	Exclude
Site	Site	Site	<b>V</b>	Default
Employee Type	Ту	Ту	V	Default
Bargaining Unit	BU	BU		Default
Report Code	RC	RC	V	Default
Leave Group	LG	LG		Default
Termination Date	Terminated	Terminated		Default
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#### File Options

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#### Available Additional Fields

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	Description	Default Header	Custom Header	Action
•	Employee Birth Date	Birth Date	Birth Date	Include
	Employee Hire Date	Hire Date	Hire Date	Include
	Employee Rehire Date	Rehire Date	Rehire Date	Include
	Employee Anniversary Base Date	Ann Base Date	Ann Base Date	Include
	Employee Longevity Base Date	Long Base Date	Long Base Date	Include
	Employee Original Hire Date	Orig Hire Date	Orig Hire Date	Include
	Employee Fingerprint Date	Fingerprint Date	Fingerprint Date	Include
	Employee Seniority Date	Seniority Date	Include	
	Employee Previous Sen Date	Prev Sen Date Prev Sen Date		Include
	Employee Group Code	GC	GC	Include
	Employee Home Phone Number	Home Phone	Home Phone	Include
	Employee Ok to Rehire	OR	OR	Include
	Employee Ok to Pay	OP	OP	Include
	Employee Pay Code	PC	PC	Include
	Employee Pay Schedule	W4/PS	W4/PS	Include
	Employee Retirement System	RS	RS	Include
	Employee Stat. Ded Profile	W4/SDP	W4/SDP	Include
	Employee Deferred Pay Option	DPO	DPO	Include
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Gender	G	G	Rec.	Default	
Employee Pay Location	PL	PL		Exclude	
Employee Control Group	CG	CG	V	Exclude	
Site	Site	Site	V	Default	
Employee Type	Ту	Ту	V	Default	
Bargaining Unit	BU	BU		Default	
Report Code	RC	RC	V	Default	
Leave Group	LG	LG	V	Default	
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Employee Work E-Mail	Work E-mail	Work E-mail	<b>V</b>	Exclude	

### **Display in Employee Maintenance**

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### Grid Output to Excel





### Employee Lists

- Stored Individually
- Static not a search
- Similar to a list of employees on an external file or piece of paper
- Identify lists of people for different tasks
- Alternative to searching

### Employee Lists in Employee Maintenance

By SSN	By Ext Ref	By Name	By ID	L	)istrict :	90	Colore	Inclu	de l'erminated	Add to grid	
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### **Employee Lists**



Office of Education





### Adding a Collection

- Window 1
- Window 2
- Select
- Select

- 🛍 Edit	Edit
- 👔 Edit	New Collection yee List/Collection Probabtionary By Location Technology Payroll Services 1150 Bargaining Units
"∎" New List →	Classified - Group1 - Active( Readonl TB Dates TB January 2015
* New Collection	



### Adding a Collection

 Note – *Collections* do not appear in the drop down list in Employee Maintenance Window. Name wisely.





### **Enter Collection Name**

🗄 🍟 New List 👻 Delete 👘 C	Organize 👻 👔 Edit	🗄 💁 Import 🕞 🖉 🖉	xport 👻 🎭 Remove	e 🎥 Select 👻
Unassigned CTA (Readonly)		Dist	Name	SSN
Probabtionary     By Location     Technology	Employee List/Collection	Name Entry	-	×
Payroll Services 1 Bargaining Units	Enter Collection/En	mployee List Name		
Classified - Group	Collection:	New Collection		
IB January 2015	Employee List:	New List		
			ОК	Cancel

### Create List

- Every collection must have at least 1 list
- The first list will be given the name "New List" – unless you name it
- You can always modify list names and settings at a later time



### Adding List in Existing Collection





### **Collections - Lists**







### Adding Employees

Choose Edit

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Options become active

🛛 🎭 Import 🕞 🍣	👌 Export 🕞 🇞 Remove	🎥 Select 👻	🔎 Inspect
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### Import Employees to List



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Dist	Name	SSN	G

Choosing inspect completes process



### Selecting Employees from Grid





### Managing Lists

Double Click to activate







### Managing Lists

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File Options					
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.....now since I have you here....



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	Employment Verification (VE)		Color Mode		•
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	Action Log History (AH)		Put cursor in search panel who	en this screen is activated	
	- Search Action Log History		Show info icons when highlig	hting required fields on dataforms	
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Choose the maximum number of employees/applicants that can be opened 5	onfigure Maximum number of Open employees/applicants	Choose Main Tree Colors
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OK Can	Windows Colors      Basic Colors      Imp/App 1     Emp/App 2     Emp/App 3     Emp/App 4     Emp/App 5     Font Color     Font Color     Font Color     Font Color     Font Color     Font Color     Sample Grid Row	Image: Bold Font   Font Size: Standard   Choose Employee List Editor Tree Colors (Employee Mode Only)   Background   Font Color   Image: Standard   Image: Standard
		OK Cancel

### **Quick Peeks**

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### **Deduction Quick Peek**

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### **Checks Quick Peek**

Demographic	90 - SANTA	CLARA COUNTY OFF OF EDU	QSS/C	DASIS	
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City .		90010700 11 00700/2017	U U LU IT U ULL. 19		



File Options Window Help+Video H	ot Keys	
Show Status	Ctrl+F12	
View recently added employees/applicants	[Empty] Alt+V	
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Reload All Master Files		Save id
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<ul> <li>Enable Auto Reload of Master Files</li> </ul>		Delete D
Clear Settings on Exit		Employee/Applicant
* Exit	F12	Employee Search
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Leave Information (LV)	► A	DVHDATE Range
Benefits Management (BM)	A	QuikPeek
- Applications (AP)	A	Previously Viewed List
Action Log (AL)	A	Color Mode
Action Log History (AH)	A	Auto-activate on Mouse hover
View Audit Log	A	Auto-highlight required fields
Quick Label Print	A	Auto Action Log
Employee Data Import		Put cursor in search panel when this screen is activated
Emergency/Medical	A	Show info icons when highlighting required fields on dataforms
Professional	A	Default Program Mode
Position Control	1	(TEO) 00047-0000 101 0000 10 10 101



QuikPeek Settings

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Available QuikPeeks  Employee Comments by Comment Type Employee Position Assignments Employee Position Assignments w/Pay Info Employee Prime Position Assignment Employee Payroll Deductions Employee Payroll Deductions Employee Payroll Checks for Current Calendar Year Employee Payroll Checks for Date Range Employee W4 Data Employee Client Defined Data Employee Demographic Information  These Quick Peeks	Available DataForms          Right-click context menu         Demographic (MA)         Termination (TE)         Employee ID Maintenance         Comments (CO)         Client Defined (CL)         Name Change History         Employment Verification (VE)         Leave Information (LV)         Benefits Management (BM)         Applications (AP)         Action Log (AL)         Action Log History (AH)         Search Action Log History         View Audit Log         Applications (ME*)         Medical (ME*)         Handicaps (ME*)         Credentials (SK*)
Santa Clara County I	✓ CA-CTC Credentials (CR)         ✓ Service Yrs/Units (SK*)         ✓ Degrees (SK*)         ✓ Skills (SK*)         ✓ Check All         Uncheck All         Invert Selection             OK

### Search Settings

File	Options Window Help+Video Hot Keys	_						
3	Show Status Ctrl+F12							
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*	Clear Settings on Exit		Employee/Applicant					
4	Exit F12		Employee Search	•		By SSN	Ctrl+0	
	Name Change History Search	1	Get Employee Default	•		By Ext Ref	Ctrl+1	
	Employment Verification (VE)		Default Masterfile Sort	•	~	By Name	Ctrl+2	
	Leave Information (LV)	Р	PYHDATE Range			By ID	Ctrl+3	
	Benefits Management (BM)		QuikPeek			Sort chronologically when Add to grid is checked		
	Applications (AP)		Previously Viewed List			Select retrieved employee/applicant when Add to grid is	checked	
	Action Log (AL)		Color Mode	•		Include Applicants		
	Search Action Log History	~	Auto-activate on Mouse hover			Configure Search	Ctrl+S	
	View Audit Log	~	Auto-highlight required fields		-			
	Quick Label Print		Auto Action Log					
	Employee Data Import	~	Put cursor in search panel when this screen is activated					
	Emergency/Medical	~	Show info icons when highlighting required fields on dataforms					
E	Professional		Default Program Mode	•				



### **Setting Roles**

File	Options Window Help+Video Hot Keys	_				
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	Reload Selected Master Files		Save As	×	Global ▶	
~	Enable Auto Reload of Master Files		Delete	•	District 🕨	- 🧷 🔁
*	Clear Settings on Exit		Employee/Applicant		Personal 🕨	TB Lookup
<b>*</b>	Exit F12		Employee Search	•	term : n/a	Payroll Input
	Name Change History Search	1	Get Employee Default	•		New role
	Employment Verification (VE)		Default Masterfile Sort	•	Da Phone!	Eval Due Date (





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Published: August 2011



# Santa Clara County $\underbrace{\bullet}_{\overline{\mathbf{v}}}$ Office of Education

# Thank you!