Payroll / HR Spooktacular Thursday, October 30, 2014



Santa Clara County $\frac{O}{T}$ Office of Education

QCC Personnel Downloader

October 30, 2014

Presenter Information

Chris Dea

Applications Systems Analyst Santa Clara County Office of Education Chris_Dea@sccoe.org (408) 453-4336



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?

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	FMLIST	FRANKLIN-MCKINLEY EMPLOYEE LIST	LYNNL	RTC@	Global	2/23/2010						
	FMSAL	FRANKLIN-MCKINLEY SALARY LIST (MA PART)	LYNNL	RTCPROD	Global	7/13/2009						
	GASB45	GASB45 AS OF AUGUST 2013	LYNNL	PR@	Global	8/22/2013						
	H4C MD	Employee Medical Plan info	LYNNL	RTCPROD	Global	3/1/2011						
	INGDAT	EMPLOYEE DATA FOR ING RENEWAL	WILLIAMC	EMP@	Global	9/26/2013						
	LASTPA	EMPLOYEE LIST LAST PAY DATE JUNE 2010	HARRISB	EMP@	Global	4/24/2014						
	LEAVE	EMPLOYEES ON LEAVE	LYNNL	RTCPROD	Global	2/17/2010						
	LIFE	LIFE-STANDARD INSURANCE	PANELOS	EMP@	Global	11/5/2012						
	LSTPAI	EMPLOYEE LIST LAST PAY DATE JAN 2014	HARRISB	EMP@	Global	4/29/2014						
	LTPAID	Last Paid not Terminated	KAMPSCHD	EMP@	Global	10/16/2012						
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DATA 18	ABTBAL	ABTBAL	341	CDEA	EMP@	District	
DATA21	ABTBAL	ABTBAL	24	CDEA	EMP@	District	
DATA22	CDPDLT	CDEA PDL TEST2	1,735	CDEA	EMP@	District	
DATA33	NEWEMP	NEW EMPLOYEE LIST	19	CDEA	EMP@	District	
DATA41	NEWEMP	NEW EMPLOYEE LIST	7	CDEA	EMP@	District	
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DATA43	NEWEMP	NEW EMPLOYEE LIST	2	CDEA	EMP@	District	
DATA44	ABTBAL	ABTBAL	1,733	CDEA	EMP@	District	
DATA45	NEWEMP	NEW EMPLOYEE LIST	19	CDEA	EMP@	District	
DATA51	PDLABS	PDLABSENCES	9	CDEA	EMP@	District	
DATA52	ABTBAL	ABTBAL	9	CDEA	EMP@	District	
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	AA REPT	AA REPORT		
	TERM EMP	TERMINATED EMPLOYEES		
	STEPPLCM	STEP PLACEMENT REPORT		
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Personnel Downloader Structure





Example #1: Mail Merge for TB Letter

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		TBLIST	TB EXPIRATION LIST	HARRISB	RTCTEST	Global	11/7/2012					
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Click the Submit Job to Create Data File icon

-if you do not need to modify the preset



Example 1: Field Selection Screen

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	Client Defined Data		_	Emp name, last	20	Char	Yes			
	Position Control/PO		-	Address, street	30	Char	Yes			
	Position Control/EA		-	Address, city	18	Char	Yes			
	Benefits Management		-	Address, state	02	Char	Yes			
	Cred/Subject/SK		-	Address, ZIP + 4	10	Char	Yes			
	New Credentials/CR		-	TB expiration date	08	Date	Yes	IB	10/01/2014	12/31/2014
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04192	LVWRKL	LV Balances by Work Location	1,756	MCKIMC92	EMP@	District		
042313	APR23	HS PERSONNEL LIST 4-23-13	319	YUENALDS	HEADSTRT	District		
050613	W4GRCD	W4-GROUP CODE	1,746	MCKIMC92	EMP@	District		
05241	PRLIAB	DBAS-VACATION LIABILITY	1,986	MCKIMC92	EMP@	District		
072211	072211	HS PHONE #	282	YUENALDS	HEADSTRT	District		
0906	090613	HS EVAL LIST 9-6-13	300	SYUENALD	HEADSTRT	District		
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	121311	JOBCOD	Non-Regular Job Code List	2,667 TIJEF	RIPA EMP TYPE	District		
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	13LIAB	PRLIAB	DBAS-VACATION LIABILITY	2,117 MCKI	IMC92 EMP@	District		
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DATA45	NEWEMP	NEW EMPLOYEE LIST	19	CDEA	EMP@	District		
DATA41	NEWEMP	NEW EMPLOYEE LIST	7	CDEA	EMP@	District		
DATA42	NEWEMP	NEW EMPLOYEE LIST	0	CDEA	EMP@	District		
DATA33	NEWEMP	NEW EMPLOYEE LIST	19	CDEA	EMP@	District		
DATA43	NEWEMP	NEW EMPLOYEE LIST	2	CDEA	EMP@	District		
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DATA51	PDLABS	PDLABSENCES	9	CDEA	EMP@	District		
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TB1007	TBMM	Mail Merge for TB Expiration	71	CDEA	EMP@	District		
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	DATA66	NEWEMP	NEW EMPLOYEE LIST	7	CDEA	EMP@	District		
	DATA45	NEWEMP	NEW EMPLOYEE LIST	19	CDEA	EMP@	District		
	DATA41	NEWEMP	NEW EMPLOYEE LIST	7	CDEA	EMP@	District		
	DATA42	NEWEMP	NEW EMPLOYEE LIST	0	CDEA	EMP@	District		
	DATA33	NEWEMP	NEW EMPLOYEE LIST	19	CDEA	EMP@	District		
	DATA43	NEWEMP	NEW EMPLOYEE LIST	2	CDEA	EMP@	District		
	DATA09	PDLABS	PDLABSENCES	1,082	CDEA	EMP@	District		
	DATA51	PDLABS	PDLABSENCES	9	CDEA	EMP@	District		
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_	DATA31	TERMDP	Compare Date Last Paid to Term Date	1,694	CDEA	EMP@	District		
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If this is correct, choose Next, or choose the data type that best describes your data.			
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4 900195, "JUAN", D", "SAN JOSE", "CA	","98	5148",	4
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900167 MAUREEN	SUNNYVALE CA 9408
900195 JUAN	SAN JOSE CA 95148
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 Select all columns: press <SHIFT> and click on last column

			B	? X
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 Select
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4	YOLANDA	CONTRACTOR OF STREET,	And which the local rates	HOLLISTER	CA 95023	12/1/2014 7 RA
5	SARA			SAN JOSE	CA 95125	10/1/2014 7 RA
6	GLORIA		CONTRACTOR CONTRACT	SAN JOSE	CA 95122	10/1/2014 5 RA
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2	ARMANDO	Annual Contraint of	frame, and there are as	MILPITAS	CA 95035	12/1/2014 7 RA
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5	NEHA			HAYWARD	CA 94545	10/29/2014 7 RA
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7	MARK			SAN JOSE	CA 95111	10/29/2014 7 RA
8	KAREN FRANCE		Character and Character and Character	FREMONT	CA 94538	11/1/2014 5 RA
9	ARMAN		Canal Contract of the	SAN JOSE	CA 95124	11/1/2014 7 RA
0	JUSTICE			SANTA CLARA	CA 95050	12/1/2014 7 RA
1	ALMEDA			SAN JOSE	CA 95122	12/1/2014 7 RA
2	JUDITH	Association .		SAN JOSE	CA 95131	12/1/2014 5 RA
3	PEDRO			SAN JOSE	CA 95136	10/25/2014 7 RA
4	SAADA			SAN JOSE	CA 95157	12/1/2014 7 RA
5	LANNIE			SAN JOSE	CA 95136	10/1/2014 8 RA
6	MARTIN	descriptor.		HALF MOON BAY	CA 94019	11/1/2014 8 RA
7	KAREN				** 000000000	0 10/1/2014 9 RA
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• Use Excel to format your file



Example 2: Compare Date Terminated with Date Paid

 Select TERMDP and click on
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 Download
 Definition icon

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Name	Description	Owner	Category	Туре	Audit Date		
TEDAYS	TEACHER DAYS, PT, PSY, 205	MIKLICAP	EMP	District	3/31/2008		
TEEES	TERM EMPS AS OF 7/1/2009	MIKLICAP	EMP	District	8/9/2013		
TERM	termination dates	LYNNL	TESTREPT	District	9/24/2009		
► TERMDP	Compare Date Last Paid to Term Date	CDEA	EMP@	Global	10/7/2014		
TERMEE	TERMINATED EMPLOYEES	SHANKSP	TERM EMP	District	9/22/2005		
TEST	testforcathy	CNELSON	EMP@	Global	10/6/2014		
TEST01	TEST DATA MAILING LIST	SUPLERC	EMP	District	3/8/2006		
TEST02	A test by Cathy	MCKIMC	QSS	District	12/23/2005		
TEST1	STAFFRECTEST	KBACICA	EMP TYPE	District	7/23/2013		
TEST2	test2forcathy	CNELSON	EMP@	Global	3/13/2014		
TESTEG	This was created for the mailings class	GARCIAE	EMP	District	2/9/2005		
TESTI1		KAMPSCHD	EMP@	Global	4/16/2012		
TESTLO	Test for Lori Siewert	SOTIRIAB		District	9/22/2008		
TESTZZ		CABRERAL	EMP	District	1/31/2007		
TS9517	VOL-DED # = 8110	LIUMAR09	EMP	Global	6/4/2014		
TSALST	List of Employee TSA information	LYNNL	RTCPROD	Global	6/19/2012		
TSTPDL	TEST PDL FIXES	LYNNL	EMP	District	4/5/2012		-
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Example 2: Download/Global Settings Screen

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Click on Submit Report/Job icon



Example 2: Field Selection Screen

Download/Global Settings

Field Selection

Total Length: 133 # Fields Output: 8

Output

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Þ	Bargaining unit	02	Num	Yes			
	Barg unit name	30	Char	Yes			
	Employee type	02	Char	Yes			
	Emp type name	30	Char	Yes			
	Emp name, last	20	Char	Yes			
	Emp name, first	12	Char	Yes			
	Termination date	08	Date	Yes			
	Last date paid	08	Date	Yes			

Click on Submit Report/Job icon



Create Data for Download

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Click on Submit Report/Job icon



Create Data for Download (cont.)



Click OK



Download Data into Excel

- Click on Data tab
- Locate your QCC
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- Click Get List of Data Files button
- Select File to download
- Click the "sunny" Excel Wizard icon

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DATA03	CDPDLT	CDEA PDL TEST2	1,698	CDEA	EMP@	District	1	
DATA09	PDLABS	PDLABSENCES	1,082	CDEA	EMP@	District	1	
DATA11	CDPDLT	CDEA PDL TEST	1,735	CDEA	EMP@	District		
DATA18	ABTBAL	ABTBAL	341	CDEA	EMP@	District		
DATA21	ABTBAL	ABTBAL	24	CDEA	EMP@	District		
DATA22	CDPDLT	CDEA PDL TEST2	1,735	CDEA	EMP@	District		
DATA31	TERMDP	Compare Date Last Paid to Term Date	1,694	CDEA	EMP@	District		
DATA33	NEWEMP	NEW EMPLOYEE LIST	19	CDEA	EMP@	District		
DATA41	NEWEMP	NEW EMPLOYEE LIST	7	CDEA	EMP@	District		
DATA42	NEWEMP	NEW EMPLOYEE LIST	0	CDEA	EMP@	District		
DATA43	NEWEMP	NEW EMPLOYEE LIST	2	CDEA	EMP@	District		
DATA44	ABTBAL	ABTBAL	1,733	CDEA	EMP@	District		
DATA45	NEWEMP	NEW EMPLOYEE LIST	19	CDEA	EMP@	District		
DATA51	PDLABS	PDLABSENCES	9	CDEA	EMP@	District		
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- Click Open
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If this is correct, choose Next, or choose the data type that best describes your data.
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- Select the 1st five columns
- Click the Text radio button

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- Select the date columns
- Click the **Date** format radio button
- Click Finish

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• 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.

Using Selection Rules (cont.)

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

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	COMBEN	Commuter Benefit Eligibility	CDEA	EMP@	Global	10/6/2014			
	EUSEM	EU Screen Semester Units for Cert Staff	CDEA	EMP@	Global	8/28/2014			
	ММТВ	Mail Merge for TB Expiration	CDEA	EMP@	Global	10/7/2014			
	NEWEMP	NEW EMPLOYEE LIST	CDEA	EMP@	Global	10/27/2014			
	PAYWAR	PAYWAR	CDEA	EMP@	Global	10/16/2014			
	PDLABS	PDLABSENCES	CDEA	EMP@	Global	6/30/2014			
	TBMM	Mail Merge for TB Expiration	CDEA	EMP@	Global	10/7/2014			
	TERMDP	Compare Date Last Paid to Term Date	CDEA	EMP@	Global	10/7/2014			
	ABTBAL	ABTBAL	CDEA	EMP@	District	6/30/2014			
	CDPDLT	CDEA PDL TEST2	CDEA	EMP@	District	4/17/2014			
	COMBEN	Commuter Benefit Eligibility	CDEA	EMP@	District	9/23/2014			
	PDLABS	PDLABSENCES	CDEA	EMP@	District	6/30/2014			
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Example of Using Selection Rules(cont.)

• What are we going to get out?

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Þ	Emp name, last	20	Char	Yes	LT	J						
	Emp name, first	12	Char	Yes								
	Employee ExtRef	06	Num	Yes								
	Hire date	08	Date	Yes	IB	07/01/2014	08/31/2014					
	Pay code	02	Num	Yes	EQ	02						

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

	D <u>o</u> wnload/	'Global	Setting	s		<u>F</u> iel	ld Selection					
Dutp	Total Length: 58 # Fields Output: 5 utput											
	Field	Len	Туре	Out	OP	From	То					
Þ	Emp name, last	20	Char	Yes	LT	J						
	Emp name, first	12	Char	Yes								
	Employee ExtRef	06	Num	Yes								
	Hire date	08	Date	Yes	IB	07/01/2014	08/31/2014					
	Pay code	02	Num	Yes	EQ	02						

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