



HARRIS
School Solutions

QSSUG
Finance/Personnel Committee
January 30, 2018

Personnel Downloader (PDL)

Personnel Downloader (PDL)

What is Personnel Downloader?

Features & Security

You Have Choices!

- HR Report Selector
 - Predefined reports
 - Variety of selection criteria
 - “It is what it is”!
- Personnel Downloader
 - Easier than HR Query to use, as long as the fields you need are available
 - No account selection
 - Fixed output data; cannot sort output data
 - Retrieved data can be saved for reuse
- HR Query
 - Most fields are available
 - Can select accounts
 - Can reformat output data; can sort output data
 - Allows “find” using a specific character string
 - Cannot save retrieved data

PDL Application Features

- A tool to select data from the database and create a comma/tab separated file which can be imported into 3rd party applications such as Excel
- Easy navigation between categories, download definitions and data files
- Drop down list integration of setup values
- Fields categorized for easy access

PDL Application Features

- Immediate export of download data files to QSS grid/MS applications
- User settings (options) for enhanced productivity
- Fully supports new Payroll/Absence Tracking/Comment data with appropriate security
- SSN can be secured

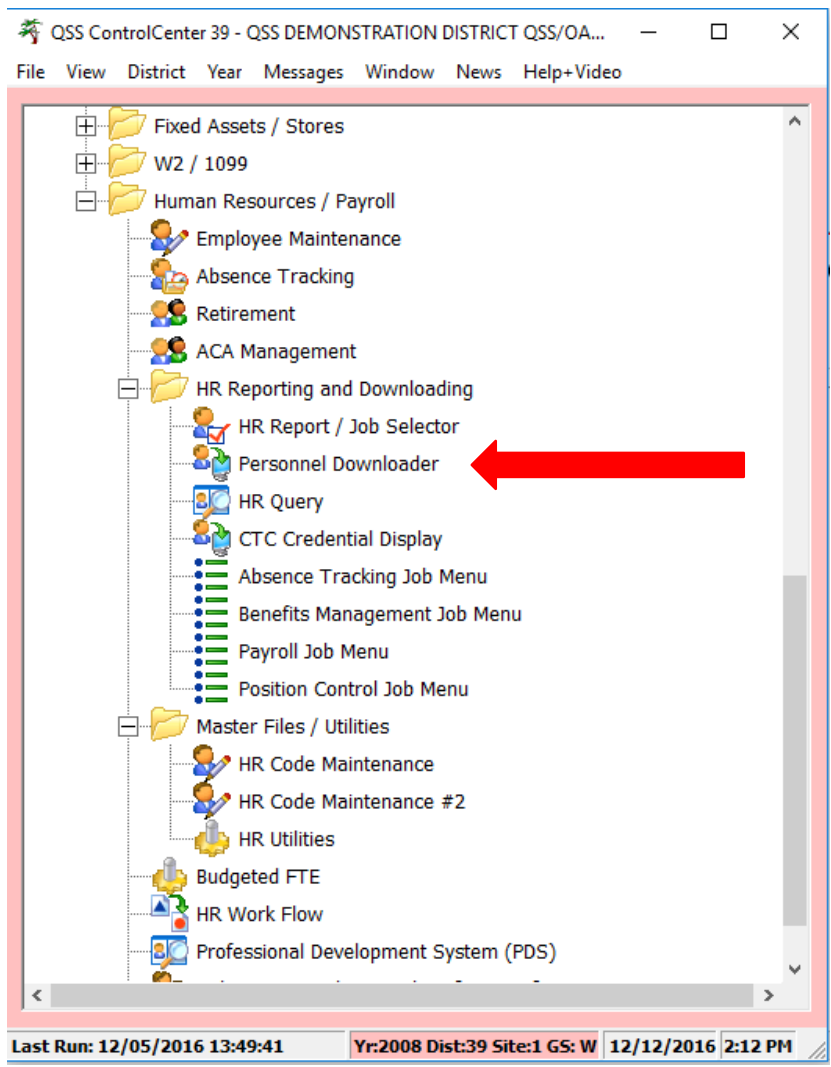
PDL Security Settings

See the Module, Task and User Security (MTUS) manual, section 5.32, for information on security settings for PDL. These settings allow you to:

- specify the files and data that users can select
- block access to downloading SSNs
- allow downloading SSNs and data from one or more categories (PD, PH, AB, CO, PR)

Working With Existing (Saved) Download Definitions

Personnel Downloader (PDL)



Your QCC Main Menu may be different!

PDL Opening Window

Personnel Downloader 39 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help+Video

Inspect

Download Definition | Data | Categories

Select Download | Download/Global Settings | Field Selection

SubSet

Include Global: Include District: Owner: Category:

Name	Description	Owner	Category	Type	Audit Date
▶ ABCOM	AB- Comment #1	DEA 12	KAREN	Global	7/31/2012
APD	append	DEA 12	KAREN	Global	12/19/2008
APPT	APTRACKING	DEA 12	KAREN	Global	12/18/2008
COM	AB-Comment information	DEA 12	KAREN	Global	1/19/2016
DAYS	DAY	SYSTEMGR	PERSONNL	Global	2/25/2008
DEGDRH	Degree / Units Report	IEA06	JL	Global	12/2/2015
DEGREE	Degree / Units Report	IEA06	JL	Global	7/7/2011
DEM1	for webinar demo	IEA 18	PERSONNL	Global	12/1/2008
DISP1	Display 1	DEAAJL	PERSONNL	Global	10/11/2013
EMISC	MISC Emp Data for Karen	DEA 12	KAREN	Global	8/26/2015
EMISC2	MISC Emp Data for Karen	DEA 12	KAREN	Global	8/26/2015
EMPL	Employee Data	MGR	SAMPLE	Global	2/8/2016
FFTEST	TEST FOR FRANK	MGR	PERSONNL	Global	10/2/2009
FROG	test for bart	MGR	PERSONNL	Global	6/8/2016
GAJTST	GAJTST	DEA07	PERSONNL	Global	8/27/2015
GARY	gary test	SYSTEMGR	PERSONNL	Global	5/25/2010
GARY2	gary test	SYSTEMGR	PERSONNL	Global	5/14/2010

PDL010 (02): View - Any file. Update - Any file. Yr:2008 Dist:39 Site:1 12/12/2016 2:31 PM

More About Existing Definitions

Personnel Downloader 39 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help+Video

Download Definition | Data | Categories

Select Download Download/Global Settings Field Selection

SubSet

Include Global Include District Owner: [dropdown] Category: [dropdown]

Name	Description	Owner	Category	Type	Audit Date
ABCOM	AB- Comment #1	DEA12	KAREN	Global	7/31/2012
APD	append	DEA12	KAREN	Global	12/19/2008
APPT	APTRACKING	DEA12	KAREN	Global	12/18/2008
COM	AB-Comment information	DEA12	KAREN	Global	1/19/2016
DAYS	DAY	SYSMGR	PERSONNL	Global	2/25/2008
DEGDRH	Degree / Units Report	IEA06	JL	Global	12/2/2015
DEGREE	Degree / Units Report	IEA06	JL	Global	7/7/2011
DEM1	for webinar demo	IEA18	PERSONNL	Global	12/1/2008
DISP1	Display 1	DEAAJL	PERSONNL	Global	10/11/2013
EMISC	MISC Emp Data for Karen	DEA12	KAREN	Global	8/26/2015
EMISC2	MISC Emp Data for Karen	DEA12	KAREN	Global	8/26/2015
EMPL	Employee Data	MGR	SAMPLE	Global	2/8/2016
FFTEST	TEST FOR FRANK	MGR	PERSONNL	Global	10/2/2009
FROG	test for bart	MGR	PERSONNL	Global	6/8/2016
GAJTST	GAJTST	DEA07	PERSONNL	Global	8/27/2015
GARY	gary test	SYSMGR	PERSONNL	Global	5/25/2010
GARY2	gary test	SYSMGR	PERSONNL	Global	5/14/2010

PDL010 (02): View - Any file. Update - Any file. Yr:2008 Dist:39 Site:1 12/12/2016 2:31 PM

- Submit definition directly with Submit icon
- Open definition to view or change with Folder icon
- Add a new definition with Plus icon
- Filter by owner and/or category

Filter by Owner

Personnel Downloader 82 - QSS DEMO DISTRICT #82 QSS/OASIS

File Options Help

Download Definition | Data | Categories

Select Download Download/Global Settings Field Selection

SubSet

Include Global: Include District: Owner: Category:

Name	Description	Owner	Category	Type	Audit Date
DAYS	DAY	DEA03			
DEGREE	Degree / Units Report	DEA08	DNNL	Global	2/25/2008
FFTEST	TEST FOR FRANK	DEA09			
RFTEST	This is a complete test	DEADAP		Global	9/26/2006
SENIOR	Seniority listing ??	IEA06	DNNL	Global	5/22/2006
SENTST	Seniority listing ??	IEA09	DNNL	Global	2/25/2008
TEST	TEST	IEA18			
BMDSBG	bm ded sched test for bill	SYSMGR	PERSONNL	Global	2/25/2008
CDG1	TEST FOR CRAIGG	SYSMGR	PERSONNL	Global	3/1/2005
CRAIG	CRAIG	SYSMGR	ABC	Global	4/21/2005
DAPLV1	Dap's Leave Tracking Test #1	MGR	PERSONNL	District	4/2/2001
DAPN01	DAP NEW #01	DEA08		District	3/1/2007
DAPPD	DAP TEST FOR PAY-DEDUCTIONS	MGR	TEST2	District	1/31/2005
DAPPDX	DAP - FEWER PD FIELDS	DEADAP	LEAVE	District	1/21/2008
DAPPHA	DAP'S PH TEST 'A'	DEADAP	PAYROLL	District	2/28/2008
DAPPYA	DAP'S PAYROLL TEST	DEADAP	PAYROLL	District	2/25/2008
DAPT01	DAP TRAINING #1	DEA09	TEST001	District	4/3/2007
DAPT02	DAP TRAINING #1	DEA09	TEST001	District	2/6/2007
DAPT05	TEST FOR DAP	DEA09	TEST001	District	2/22/2007
DAPT06	DAP TEST #6	DEA09	TEST001	District	2/28/2007
DAPT07	DAP TEST NUMBER 7	DEA09	TEST001	District	2/28/2007

Yr:2002 Dist:82 Site:0 2/28/2008 9:50 AM

Filter by Category

Personnel Downloader 82 - QSS DEMO DISTRICT #82 QSS/OASIS

File Options Help

Download Definition | Data | Categories

Select Download Download/Global Settings Field Selection

SubSet

Include Global Include District Owner: Category:

Name	Description	Owner	Category	Type	
DAYS	DAY	SYSMGR	PERSONNL	Global	ABC
DEGREE	Degree / Units Report	IEA06	ABC	Global	FTEST
FFTEST	TEST FOR FRANK	MGR	PERSONNL	Global	LEAVE
RFTEST	This is a complete test	IEA18	PERSONNL	Global	PAYROLL
SENIOR	Seniority listing ??	SYSMGR	PERSONNL	Global	PERSONEL
SENTST	Seniority listing ??	SYSMGR	PERSONNL	Global	PERSONNL
TEST	TEST	SYSMGR	ABC	Global	2/25/2008
BMD5BG	bm ded sched test for bill	MGR	PERSONNL	District	3/1/2005
CDG1	TEST FOR CRAIGG	DEA08		District	4/2/2001
CRAIG	CRAIG	MGR	TEST2	District	4/2/2001
DAPLV1	Dap's Leave Tracking Test #1	DEADAP	LEAVE	District	1/21/2008
DAPN01	DAP NEW #01	DEADAP	PERSONEL	District	2/28/2008
DAPPD	DAP TEST FOR PAY-DEDUCTIONS	DEADAP	PAYROLL	District	2/25/2008
DAPPDX	DAP - FEWER PD FIELDS	DEADAP	PAYROLL	District	1/27/2008
DAPPHA	DAP'S PH TEST 'A'	DEADAP	PAYROLL	District	1/28/2008
DAPPYA	DAP'S PAYROLL TEST	DEADAP	PAYROLL	District	2/25/2008
DAPT01	DAP TRAINING #1	DEA09	TEST001	District	4/3/2007
DAPT02	DAP TRAINING #1	DEA09	TEST001	District	2/6/2007
DAPT05	TEST FOR DAP	DEA09	TEST001	District	2/22/2007
DAPT06	DAP TEST #6	DEA09	TEST001	District	2/28/2007
DAPT07	DAP TEST NUMBER 7	DEA09	TEST001	District	2/28/2007

Yr:2002 Dist:82 Site:0 2/28/2008 9:50 AM

Creating or Modifying Download Definitions

Start With an Existing Definition

Personnel Downloader 39 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help+Video

Inspect

Download Definition | Data | Categories

Select Download | Download/Global Settings | Field Selection

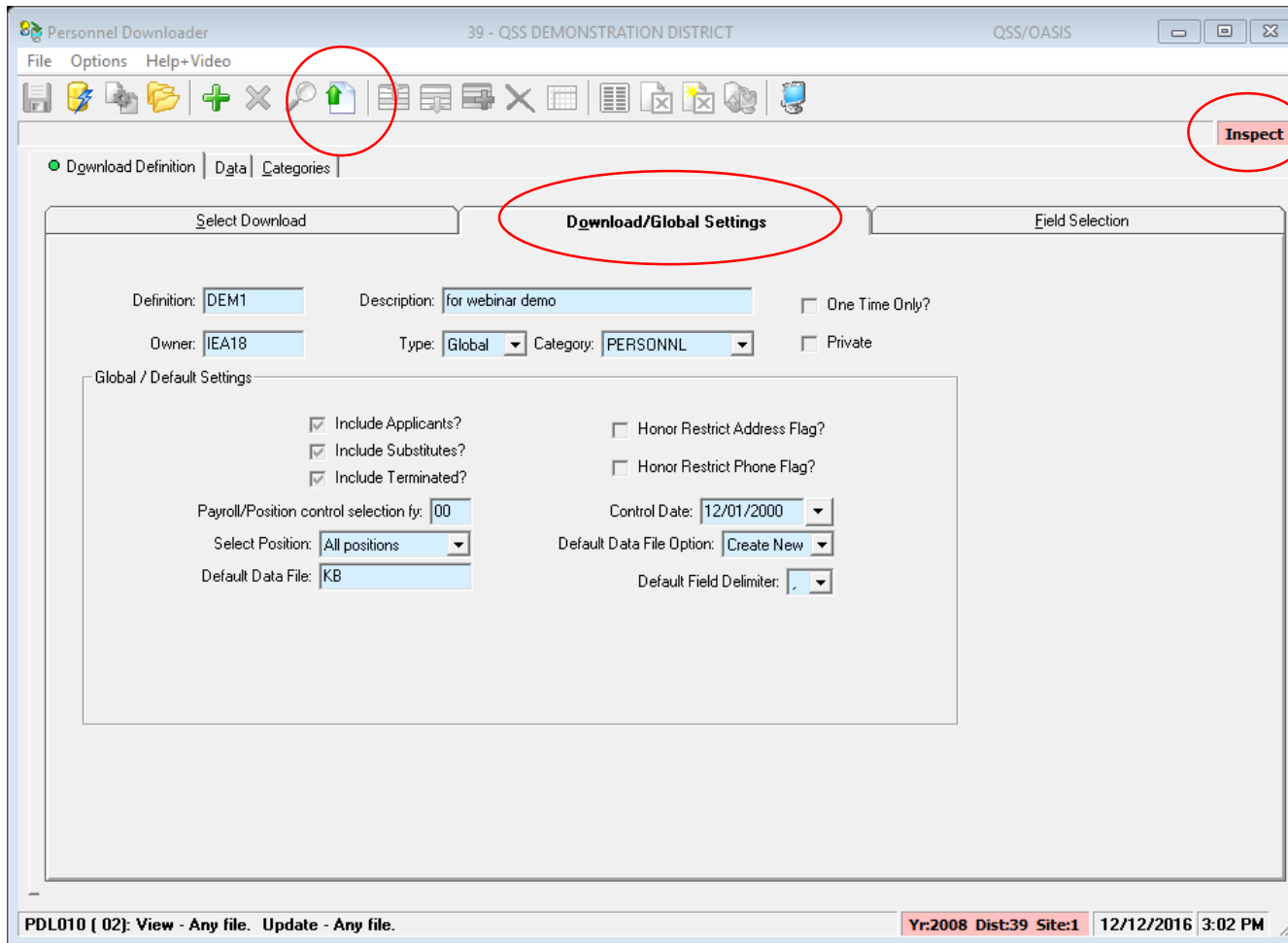
SubSet

Include Global: Include District: Owner: Category:

Name	Description	Owner	Category	Type	Audit Date
ABCOM	AB- Comment #1	DEA12	KAREN	Global	7/31/2012
APD	append	DEA12	KAREN	Global	12/19/2008
APPT	APTRACKING	DEA12	KAREN	Global	12/18/2008
COM	AB-Comment information	DEA12	KAREN	Global	1/19/2016
DAYS	DAY	SYSMGR	PERSONNL	Global	2/25/2008
DEGDRH	Degree / Units Report	IEA06	JL	Global	12/2/2015
DEGREE	Degree / Units Report	IEA06	JL	Global	7/7/2011
DEM1	for webinar demo	IEA18	PERSONNL	Global	12/1/2008
DISP1	Display 1	DEAAJL	PERSONNL	Global	10/11/2013
EMISC	MISC Emp Data for Karen	DEA12	KAREN	Global	8/26/2015
EMISC2	MISC Emp Data for Karen	DEA12	KAREN	Global	8/26/2015
EMPL	Employee Data	MGR	SAMPLE	Global	2/8/2016
FFTEST	TEST FOR FRANK	MGR	PERSONNL	Global	10/2/2009
FROG	test for bart	MGR	PERSONNL	Global	6/8/2016
GAJTST	GAJTST	DEA07	PERSONNL	Global	8/27/2015
GARY	gary test	SYSMGR	PERSONNL	Global	5/25/2010
GARY2	gary test	SYSMGR	PERSONNL	Global	5/14/2010

PDL010 { 02}: View - Any file. Update - Any file. Yr:2008 Dist:39 Site:1 12/12/2016 3:00 PM

Verify Download/Global Settings



- Notice screen is in “Inspect” mode

- Click the Change icon to enter “Change” mode

Modify the Field List

Personnel Downloader 39 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help+Video

Download Definition | Data | Categories

Select Download Download/Global Settings **Field Selection**

Definition: DEM1 Total Length: 59 # Fields Output: 5

Output

Field	Len	Type	Out	OP	From	To
Emp name, last	20	Char	Yes			
Gender	01	Char	Yes			
Birth date	08	Date	Yes			
Finger print date	08	Date	Yes			
TB expiration date	08	Date	Yes			

PDL010 [02]: View - Any file. Update - Any file. Yr:2008 Dist:39 Site:1 12/12/2016 3:14 PM

- Select category to view fields
- Select fields (can select multiple at once)
- Fields are added to end of list by default - use Up/Down icons to reposition
- Click Save icon (diskette)

Enhanced Settings

The screenshot shows the 'Personnel Downloader' application window. The title bar indicates '82 - QSS DEMONSTRATION DISTRICT' and 'QSS/OASIS'. The 'Options' menu is open, showing various settings. The 'Field Selection' tab is active, displaying a table of fields to be included in the data file output.

Field	Len	Type	Out	OP	From	To
Employee ExtRef	06	Num	Yes			
Emp name, first	12	Char	Yes			
Emp name, last	20	Char	Yes	IB	A	BZ
Bargaining unit	02	Num	Yes			
Barg unit name	30	Char	Yes			
Gender	01	Char	Yes			
Address, city	18	Char	Yes			
Address, state	02	Char	Yes			
Address, street	30	Char	Yes			
Address, ZIP + 4	10	Char	Yes			

Additional information from the screenshot: Total Length: 156 # Fields Output: 10. Status bar: Yr:2006 Dist:82 Site:0 3/3/2007 10:59 AM.

- Automatically submit job to create data file when saving a new definition
- Automatically submit job to create data file when existing definition updated
- Include field headings in data file output

Working with Data

Data Tab

Personnel Downloader 82 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help

Download Definition **Data** Categories

Data SubSet

Access: Include all files Owner: Category: Lines to retrieve: All 20 40 oo

File Name	Name	Description	Records	Owner	Category	Access
CDG1	CDG1	TEST FOR CRAIGG	2,551	DEA08		District
DAPT99	DAPT01	DAP TRAINING #1	242	DEA09	TEST001	Owner
DPD001	DAPT01	DAP TRAINING #1	243	DEA09	TEST001	District
DPD002	DAPT01	DAP TRAINING #1	243	DEA09	TEST001	Owner
DPD004	DAPT01	DAP TRAINING #1	243	DEA09	TEST001	District
DPD005	DAPT5T	NEW DOWNLOAD - TRAINING	0	DEA09	TEST3	District
DPD80A	DAPT80	DAP Test download #80	0	DEA09	TEST001	Owner
DPD80B	DAPT80	DAP Test download #80	242	DEA09	TEST001	District
DPDA01	DAPT01	DAP TRAINING #1	240	DEA09	TEST001	District
DPDX01	DAPT80	DAP Test download #80	242	DEA09	TEST001	Owner
DPDX02	DAPT01	DAP TRAINING #1	242	DEA09	TEST001	District
DPDX88	DAPT×2	DAP TEST ×2	2,551	DEA09	TEST016	District
DPDX99	DAPX01	DAP TEST X 02	2,551	DEA09	TEST016	District
DPT009	DAPT01	DAP TRAINING #1	240	DEA09	TEST001	District

Yr:2006 Dist:82 Site:0 3/3/2007 11:05 AM

- Filter by owner and/or category
- Choose data file, then click on output method (Grid, Excel, Excel Wizard, Desktop Data File)
- Field headings will be included if you selected that option and they are available
- Use “Lines to retrieve” to limit download size to check your data

Sample Grid Output

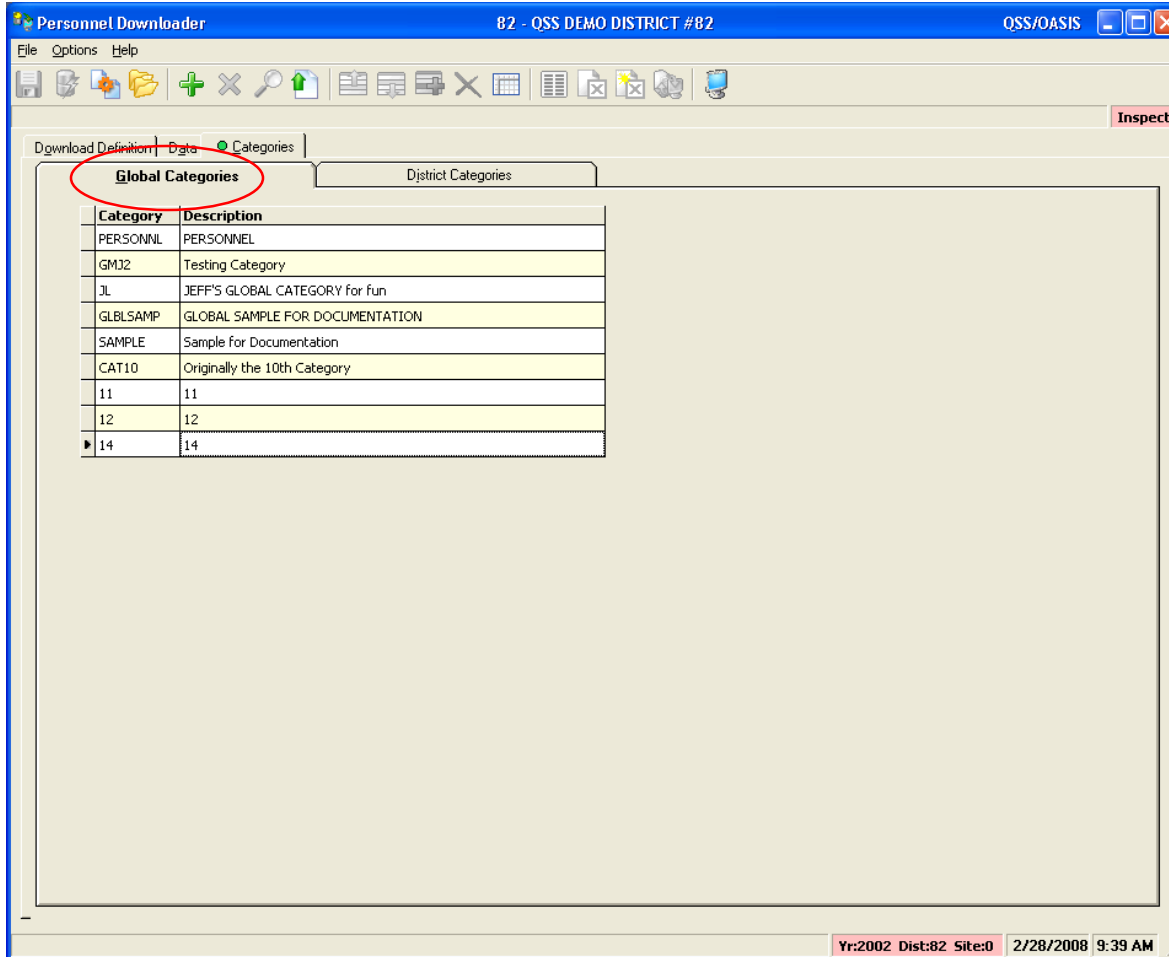
OFDPD80B.PPDNLD82

Options

Emp name, last	Emp name, first	Gender	Bargaining unit	Barg unit name	Birth date
"	"SUZANNE"	"F"	01	"TEACHERS"	06/02/1977
"	"LINDA"	"F"	02	"CLASSIFIED"	04/15/1936
"	"ANNE"	"F"	02	"CLASSIFIED"	10/08/1953
"	"JOANNE"	"F"	01	"TEACHERS"	01/01/1954
"	"LAURANCE"	"M"	01	"TEACHERS"	06/15/1942
"	"RICHARD"	"M"	02	"CLASSIFIED"	01/17/1949
"	"ANDREA"	"F"	02	"CLASSIFIED"	11/17/1947
"	"KATHLEEN"	"F"	01	"TEACHERS"	08/09/1940
"	"BARBARA"	"F"	02	"CLASSIFIED"	07/28/1947
"	"WILLIAM"	"M"	02	"CLASSIFIED"	07/03/1943
"	"CARL"	"M"	01	"TEACHERS"	04/18/1958
"	"FRANCINE"	"F"	01	"TEACHERS"	05/17/1955
"	"GLORIA"	"F"	01	"TEACHERS"	11/12/1943
"	"JUNE"	"F"	01	"TEACHERS"	11/14/1946
"	"ROSE"	"F"	03	"MANAGEMENT"	08/10/1951
"	"G. DIANE"	"F"	03	"MANAGEMENT"	12/29/1943
"	"BETH"	"F"	02	"CLASSIFIED"	10/17/1957
"	"DIANE"	"F"	01	"TEACHERS"	03/19/1952
"	"ISABELL"	"F"	02	"CLASSIFIED"	10/03/1934
"	"ANNA"	"F"	02	"CLASSIFIED"	07/10/1955
"	"SHIRLEY"	"F"	02	"CLASSIFIED"	07/23/1946
"	"ELIZABETH"	"F"	01	"TEACHERS"	02/23/1960
"	"BETH"	"F"	01	"TEACHERS"	05/20/1950
"	"SUZANNE"	"F"	01	"TEACHERS"	09/29/1950

Working with Categories

Global Categories



The screenshot shows the 'Personnel Downloader' application window for '82 - QSS DEMO DISTRICT #82'. The 'Categories' tab is active, and the 'Global Categories' sub-tab is selected and circled in red. The table below lists the categories:

Category	Description
PERSONNL	PERSONNEL
GMJ2	Testing Category
JL	JEFF'S GLOBAL CATEGORY for fun
GLELSAMP	GLOBAL SAMPLE FOR DOCUMENTATION
SAMPLE	Sample for Documentation
CAT10	Originally the 10th Category
11	11
12	12
14	14

The status bar at the bottom indicates: Yr:2002 Dist:82 Site:0 2/28/2008 9:39 AM

- Maintenance security controlled
- Used in Global Definitions
- All districts have access

Blank data or no blank data? Using the “@” Sign with Category Names

- Putting the @ sign at the end of a category name (as in this example):

Payroll@

allows PDL to download data that is blank.

- Without the @ sign, each field selected must have data in order to be reported.

Blank data or no blank data?

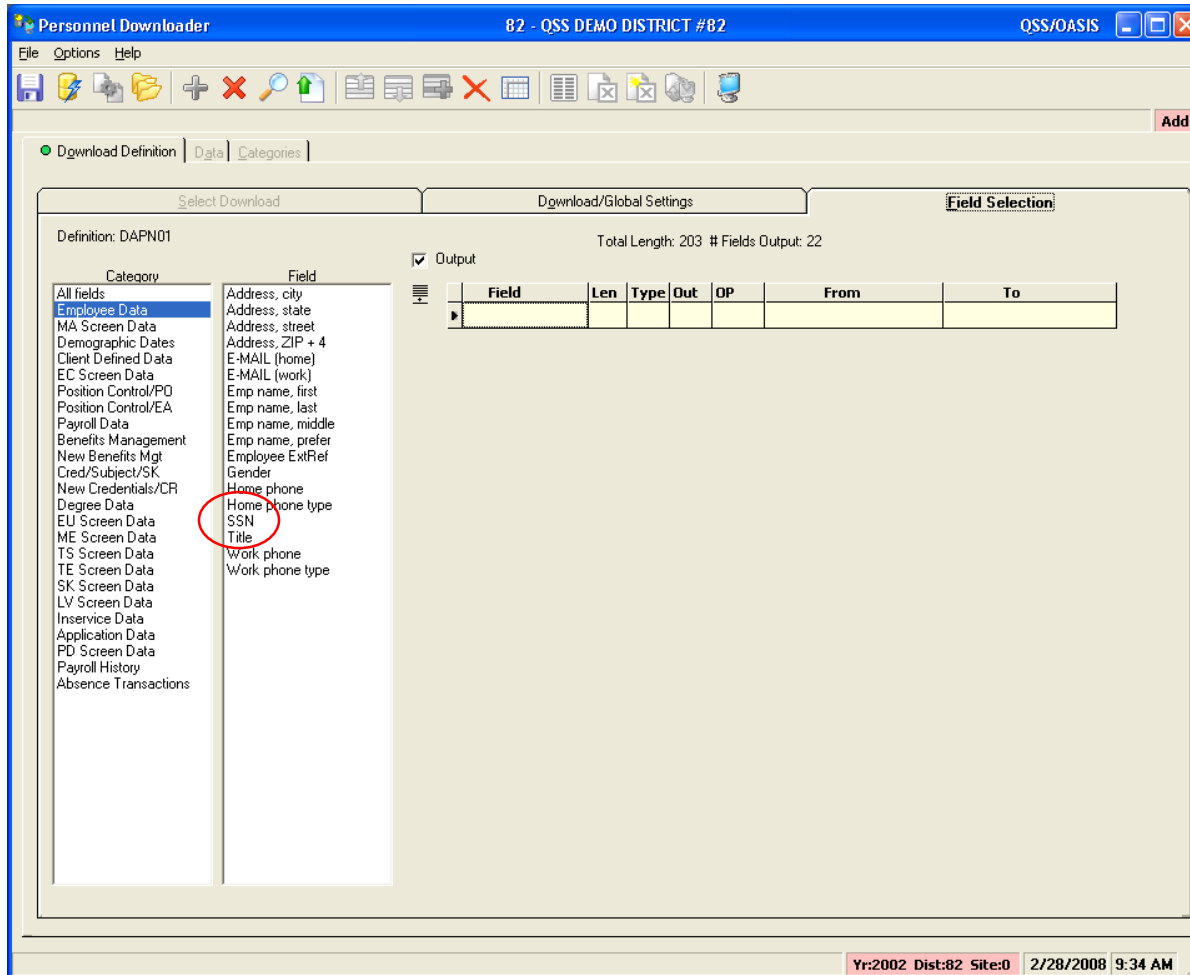
Using the “@” Sign with Category Names

For example, if you want a report that shows all employees and their degree:

- With an @ in the Category name, all employees will show up and the degree data can be blank.
- Without an @ in the Category name, only employees with degree data will appear on the report.

SSN Access Control

SSN Access Control



- Downloading SSNs is controlled by security settings
- Access to the SSN field can be restricted by user
- In this example, the user DOES have access to SSN

SSN Access Control

Personnel Downloader 82 - QSS DEMO DISTRICT #82 QSS/OASIS

File Options Help

Download Definition | Data | Categories

Select Download Download/Global Settings Field Selection

Definition: DAPN01 Total Length: 44 # Fields Output: 3

Output

Field	Len	Type	Out	OP	From	To
Emp name, last	20	Char	Yes			
Emp name, first	12	Char	Yes			
Employee ExtRef	06	Num	Yes			

Yr:2002 Dist:82 Site:0 2/28/2008 9:38 AM

- In this example, the user DOES NOT have access to SSN
- Notice the SSN field is missing from the list

Personnel Downloader (PDL)

Summary

Feedback & Questions

Select Download

Personnel Downloader 39 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help+Video

Download Definition | Data | Categories

Select Download Download/Global Settings Field Selection

SubSet

Include Global: Include District: Owner: DEAAJL Category:

Name	Description	Owner	Category	Type	Audit Date
▶ DISP1	Display 1	DEAAJL	PERSONNL	Global	10/11/2013
ADAM	Employee Data	DEAAJL	PAYROLL	District	9/18/2012

PDL010 [22]: View - Your own files or any set as 'Owner'. Update - Any file. Yr:2008 Dist:39 Site:0 10/14/2014 1:36 PM

Select Fields

Personnel Downloader 39 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help+Video

Download Definition | Data | Categories

Select Download Download/Global Settings **Field Selection** Inspect

Definition: DISP1 Total Length: 124 # Fields Output: 6

Output

Field	Len	Type	Out	OP	From
▶ Emp name, last	20	Char	Yes		
Emp name, first	12	Char	Yes		
Emp name, middle	01	Char	Yes		
Employee ExtRef	06	Num	Yes		
E-MAIL (work)	60	Char	Yes		
SEID (CA)	10	Char	Yes		

PDL010 (22): View - Your own files or any set as 'Owner'. Update - Any file. Yr:2008 Dist:39 Site:0 10/14/2014 1:36 PM

Data is Produced!

Personnel Downloader 39 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help+Video

Download Definition Data Categories **Inspect**

Data SubSet

Access: Include all files Owner: DEAAJL Category:

Lines to retrieve: All, 20, 40, oo

File Name	Name	Description	Records	Owner	Category	Access
ADAM	ABCOM	AB-Comment #1	0	DEAAJL	KAREN	District
▶ ADAM1	DISP1	Display 1	97	DEAAJL	PERSONNL	District
ADAM2	ABCOM	AB-Comment #1	0	DEAAJL	KAREN	District
TEST1	ADAM	Employee Data	49	DEAAJL	PAYROLL	District

PDL010 (22): View - Your own files or any set as 'Owner'. Update - Any file. Yr:2008 Dist:39 Site:0 10/14/2014 1:35 PM

View the Data in Excel

	A	B	C	D	E	F	G
1	Emp name, last	Emp name, first	Emp name, middle	Employee ExtRef	E-MAIL (work)	SEID (CA)	
2	WASH JR.	JAMES		1001		5312345679	
3	PERCOX	DEWAYNE		1004		929	
4	TESTER	IMA		1007			
5	TEECHUR	YURA	H	1009			
6	FERNDOCK	AVERY	P	1010			
7	EMPLOYEE	AMAZING		1011		8787343412	
8	PEABODY	PEPPER		1013		7830	
9	PEABODY	MR		1015		1414	
10	BUILDER	bob		1016			
11	Soft	JASPER	A	1020			
12	COAST	BARBARY		2000			
13	ATHENA	MARGARET		2001		7676767676	
14	NUMBER1021	MR		1021			
15	SMITH	JANE	A	2002			
16	JACKSON	JOSH	J	1022			
17	PREFECT JR.	FORD		1012			
18	CLEENUR JR.	CHAUNCEY	Q	1024			
19	ASTRONUT	NADATHE		1025		8091234567	
20	CLEANER	IMA	G	1008			
21	NEWBEE	CANBEE	A	1026	cnewbee@tusc	6578923412	
22							

Personnel Downloader (PDL) – Give Feedback

Date and Time (Pacific)	Workshop Title & Announcement Flyer Links	Sponsor, Workshop Type, Location	Presenter / Q/A for Webinars	QSSUG Member or HSS-sponsored Reg. Cost	QSSUG Non-Member Reg. Cost	Status (See Legend Below)
Tuesday January 30, 2018 10am-12 Noon	Personnel Downloader (PDL) Download flyer	QSSUG Fin-Per Webinar Give Feedback	Mike Smith	\$0.00	\$250.00	Open

