# QSSUG
# Finance/Personnel Committee
# January 30, 2018

*Personnel Downloader (PDL)*

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# Personnel Downloader (PDL)

# What is
# Personnel Downloader?

# Features & Security

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# You Have Choices!

- <u>HR Report Selector</u>
  - Predefined reports
  - Variety of selection criteria
  - "It is what it is"!

- <u>Personnel Downloader</u>
  - 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

- <u>HR Query</u>
  - 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

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# 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

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# 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

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# 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)

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# Working With Existing (Saved) Download Definitions

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# Personnel Downloader (PDL)
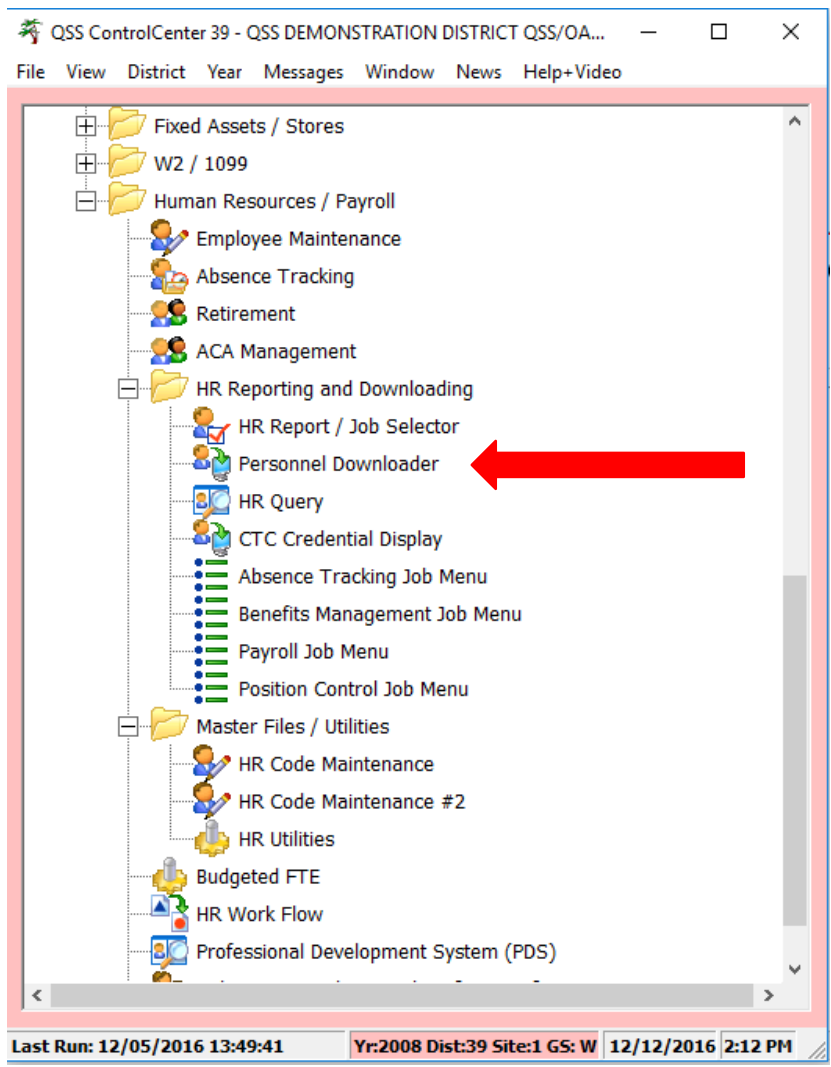


Your QCC Main Menu may be different!

# PDL Opening Window

# More About Existing Definitions



- 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

# Filter by Category

# Creating or Modifying Download Definitions

# Start With an Existing Definition

# Verify Download/Global Settings
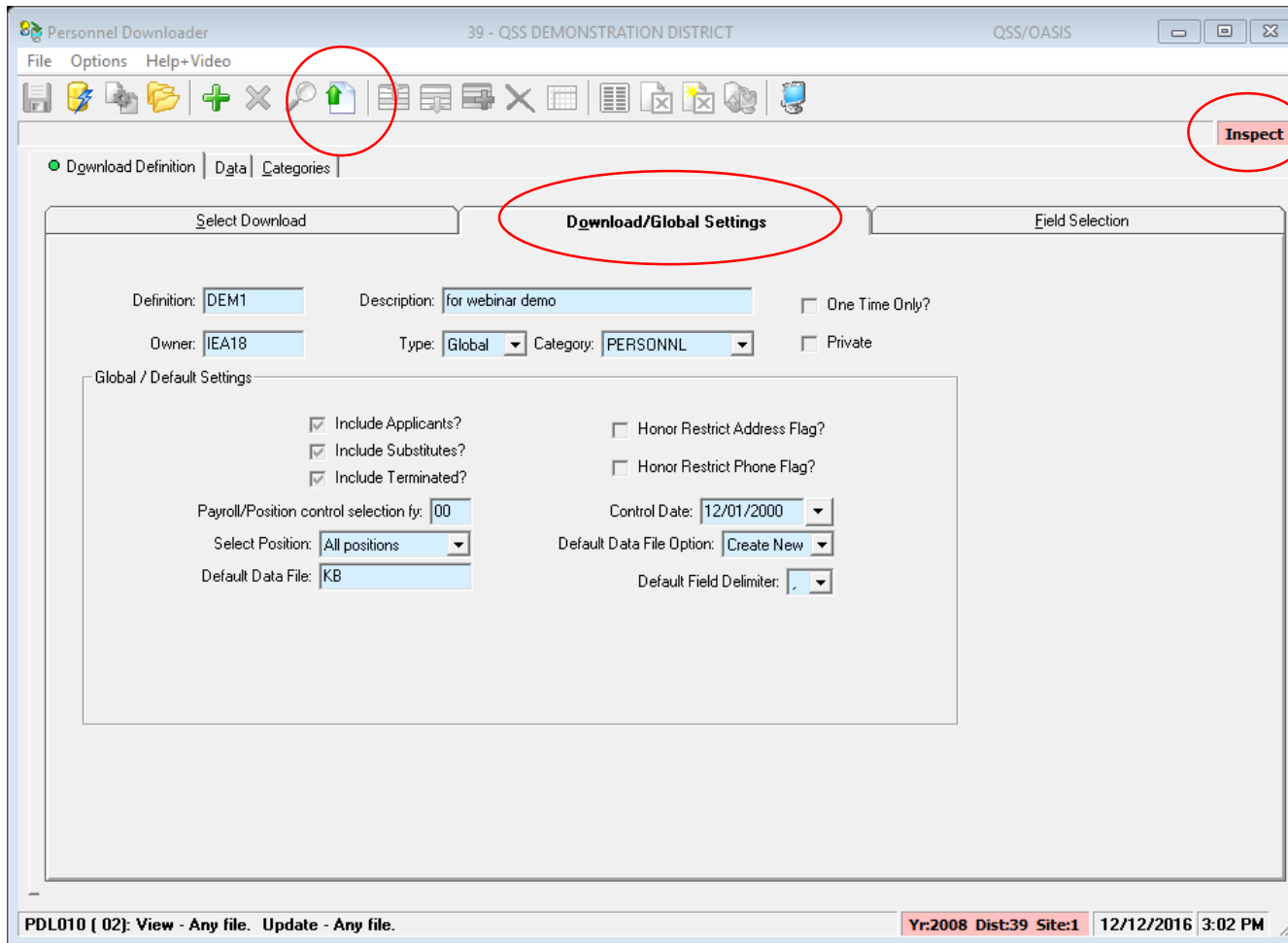


- Notice screen is in "Inspect" mode

- Click the Change icon to enter "Change" mode

# Modify the Field List



- 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)

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# Enhanced Settings



- 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



- 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

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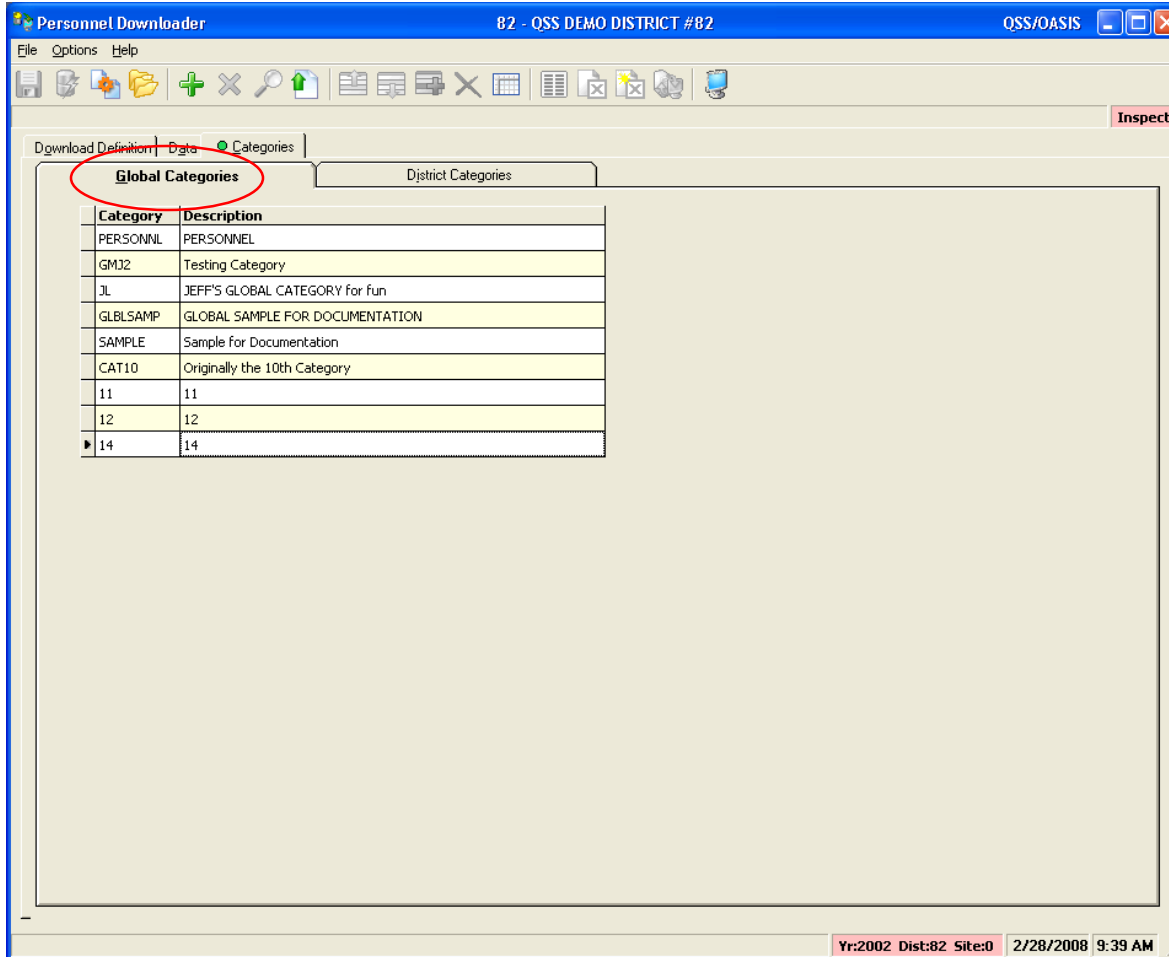
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# Sample Grid Output

# Personnel Downloader (PDL)

# Working with Categories

# Global Categories



- Maintenance security controlled

- Used in Global Definitions

- All districts have access

# District Categories



- Maintenance security controlled

- Used in District Definitions

- Logon district access only

# 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.

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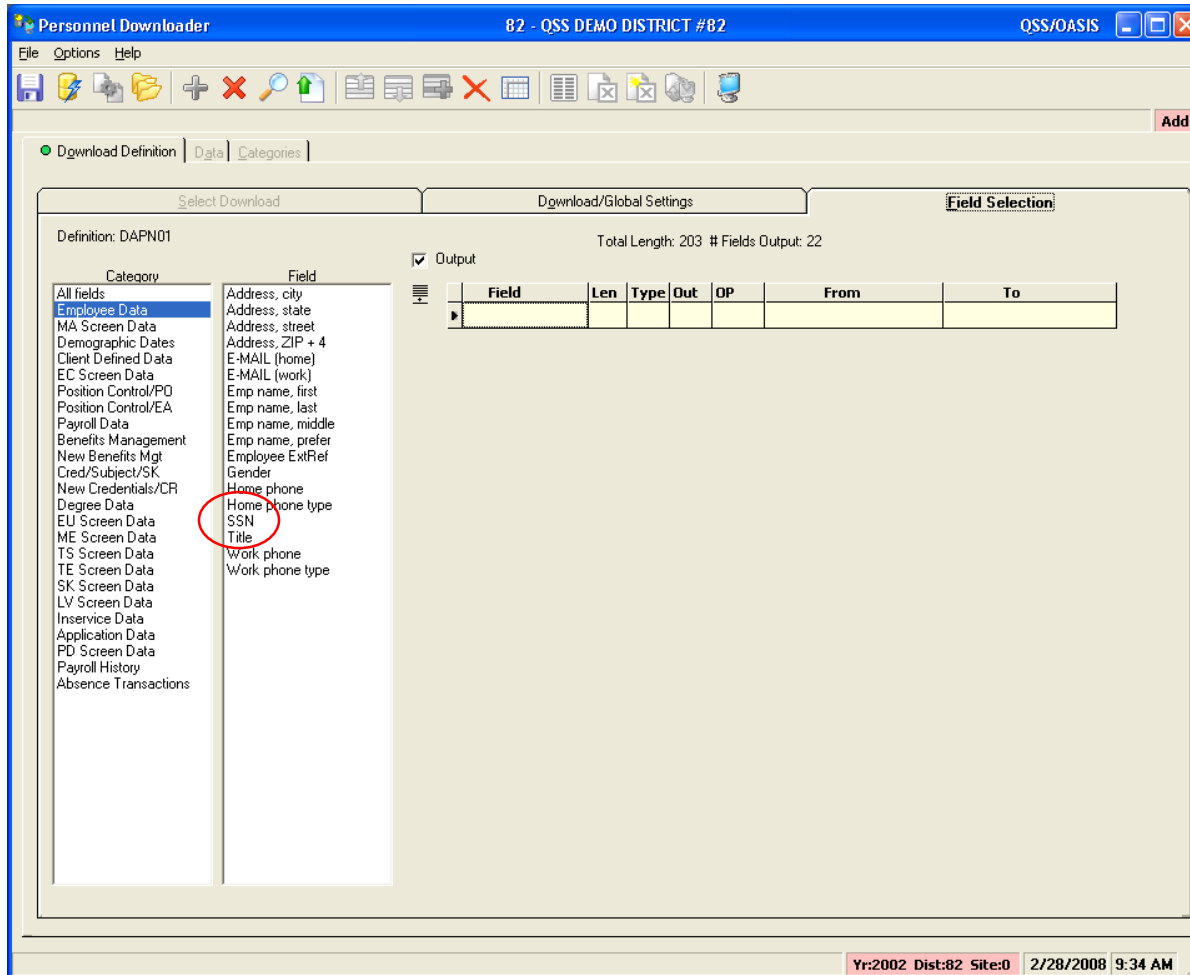
# Blank data or no blank data?
# Using the "@" Sign with Category Names

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.

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# Personnel Downloader (PDL)

# SSN Access Control

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# 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



- 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

# Select Fields

# Data is Produced!

# View the Data in Excel

# 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 |

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