







# QSSUG Finance/Personnel Committee Webinar

Personnel Downloader March 28, 2019





#### Personnel Downloader (PDL)

# What is Personnel Downloader?

Features & Security





#### Personnel Downloader (PDL) 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





## Personnel Downloader (PDL) Application Features

 A tool to select data from the database and create a comma/tab separated file which can be imported into 3<sup>rd</sup> 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





### Personnel Downloader (PDL) Application Features

Immediate export of download data files to QSS grid/MS applications

User settings (options) for enhanced productivity

- Fully supports Payroll/Absence Tracking/ Comment data with appropriate security
- SSN can be secured



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)





Table 5-16: PDL010 USERSEC parameters for the DOWNLOAD module

COL	CONTROLS	DESCRIPTION				
01	Not used	Leave blank.				
02	Download files to view on the Data tab	O The user can view data files that are not otherwise restricted by the Download Definition. For example, the user cannot view files flagged as "Private" (default).  Users can view only the data files that they have created.  The user can view all available data files, including those flagged as "Private."				
03	Categories that user can update	No update (default). This setting blocks the ability to change district and global categories.     Ability to change district categories only.     Ability to change district and global categories.				
04 - 60	Not used	Leave blank				



Table 5-17: PDLDEF USERSEC parameters for the DOWNLOAD module

COL	CONTROLS	DESCRIPTION
01	Whether to apply the PDLSEC user security	No (default). Users have access to downloading SSNs.     They do not have access to the following categories of data: PD Screen Data, Payroll History, Absence     Transactions, Employee Comments, and PR Screen     Data. The system ignores the PDLSEC user security record.  Y Yes. Block access to downloading the SSN. Define the PDLSEC user security to control access to the SSN and categories of data.
02 - 60	Not used	Leave blank



Table 5-18: PDLSEC USERSEC parameters for the DOWNLOAD module

COL	CONTROLS	DESCRIPTION
01 - 60	Access to SSNs and categories on the <u>Field</u> Selection subtab	Type up to 30 codes. Columns 01 - 02 are the first code, 03 04 the second, 05 - 06 the third, and so on.
		SSAllow downloading the SSN.
		PDAllow access to the fields in the PD Screen Data category.
		PHAllow access to fields in the Payroll History category.
		AB Allow access to fields in the Absence Transactions category.
		COAllow access to fields in the Employee Comments category.
		PRAllow access to fields in the PR Screen Data category.
		NOTE: These categories always display in the Categories
		list. If you do not allow access to them, nothing displays in the Field column after you click a category.





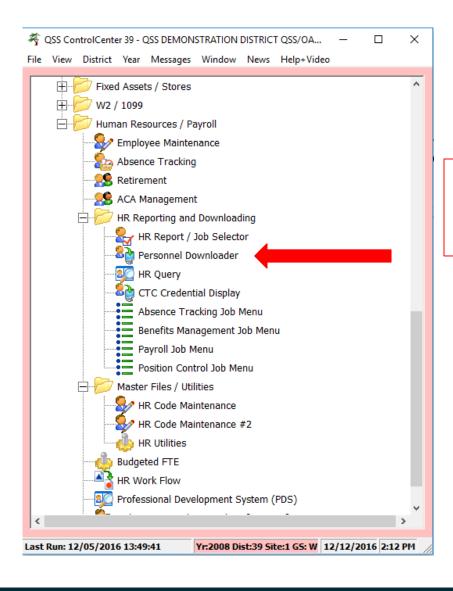
#### Personnel Downloader (PDL)

#### Working with PDL



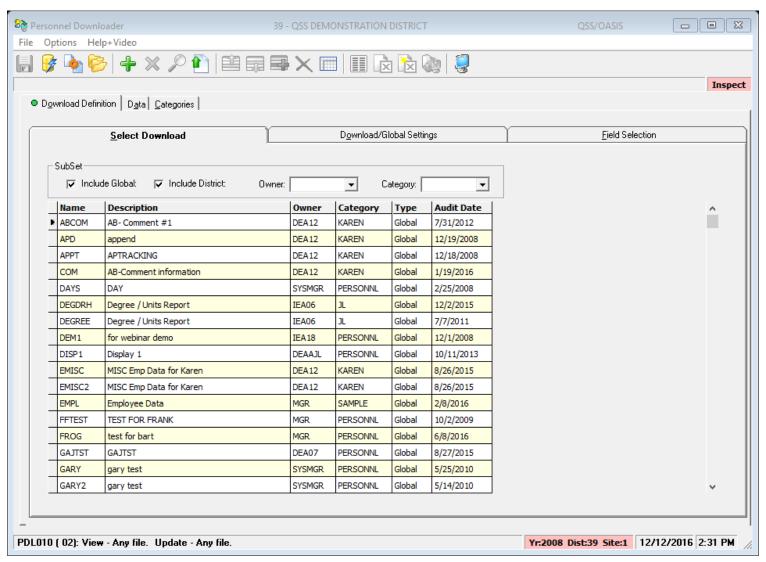


#### Personnel Downloader (PDL)

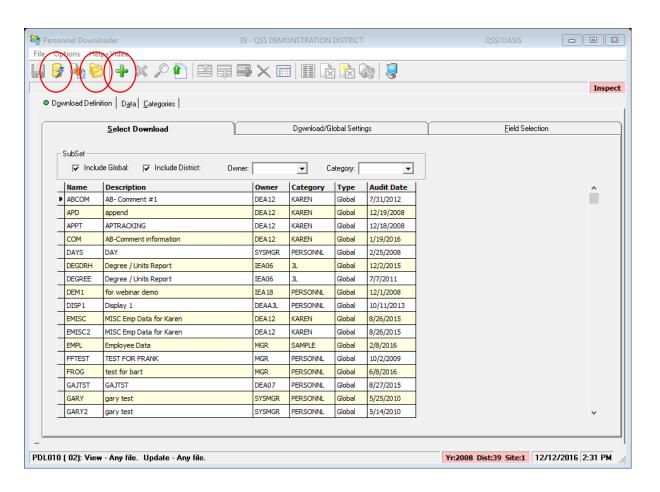


Your QCC Main Menu may be different!

# Personnel Downloader (PDL) Opening Window



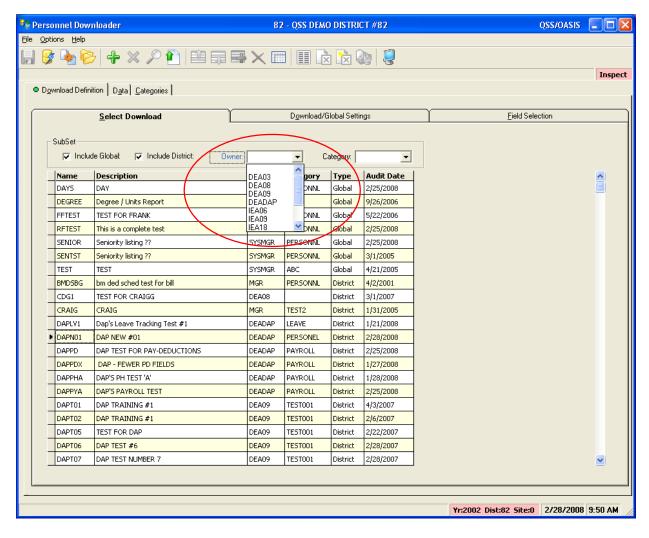
#### Personnel Downloader (PDL) Existing Definitions



- 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

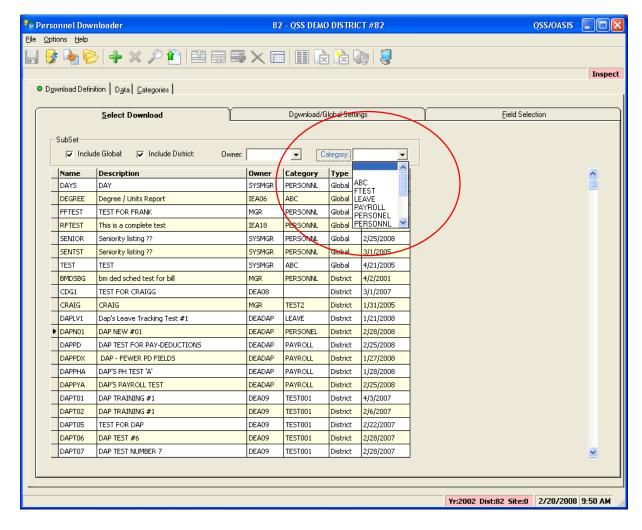


# Personnel Downloader (PDL) Filter by Owner

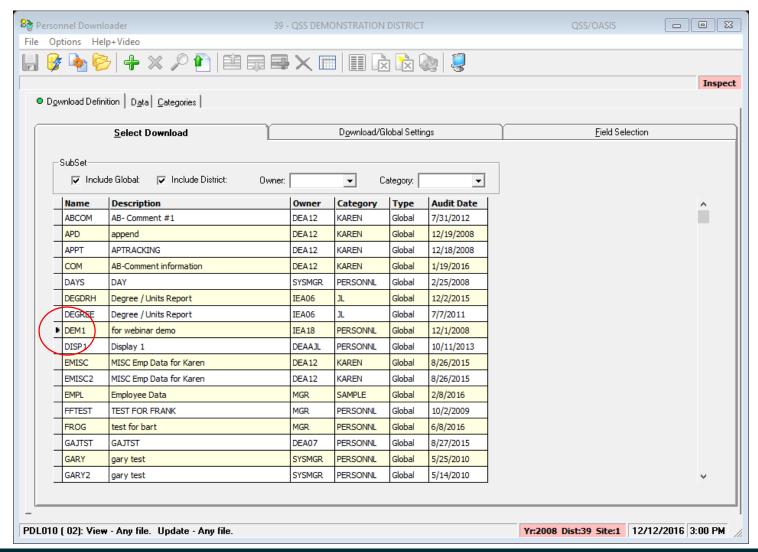




# Personnel Downloader (PDL) Filter by Category



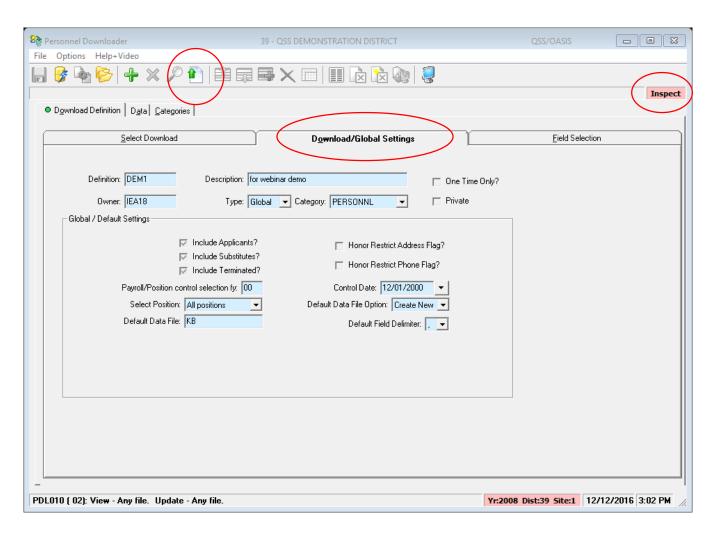
# Personnel Downloader (PDL) Starting with an Existing Definition





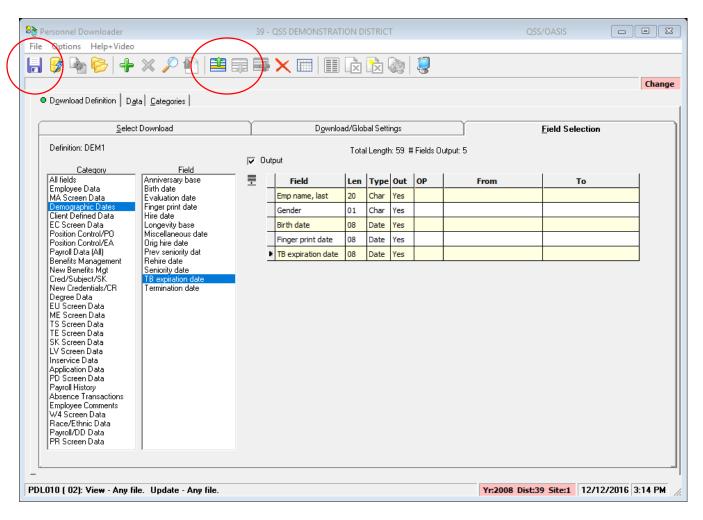


#### Personnel Downloader (PDL) Verify Download/Global Settings



- Notice screen is in "Inspect" mode
- Click the Change icon to enter "Change" mode

#### Personnel Downloader (PDL) Modify the Field List

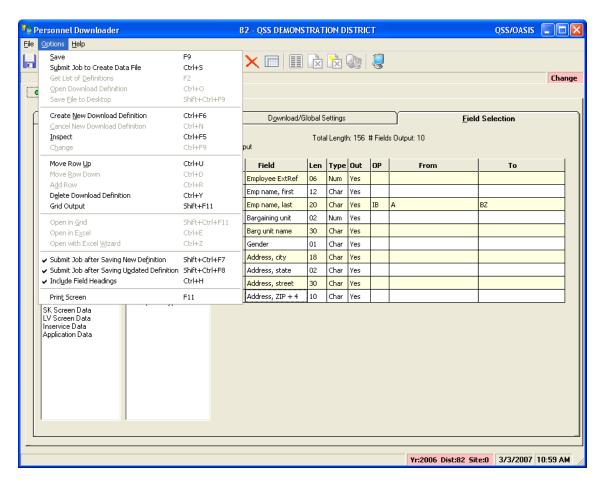


- Select category to view fields
- Select fields (can select multiple at once)
- Fields are added to end of list by default - use Up/Down icons to reposition
- Click Save icon (diskette)





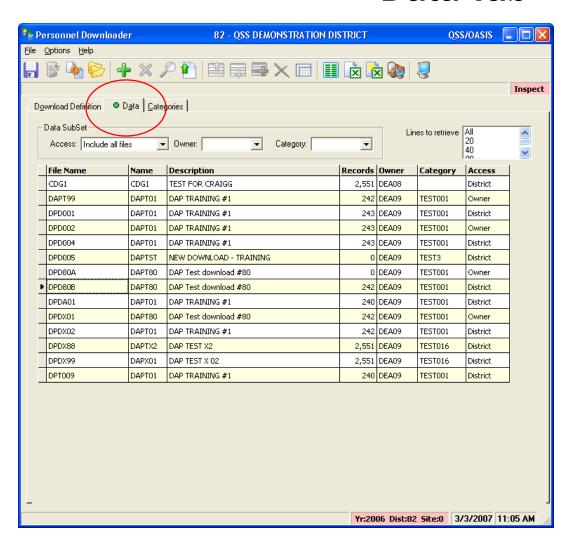
#### Personnel Downloader (PDL) Enhanced Settings



- 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



#### Personnel Downloader (PDL) Data Tab



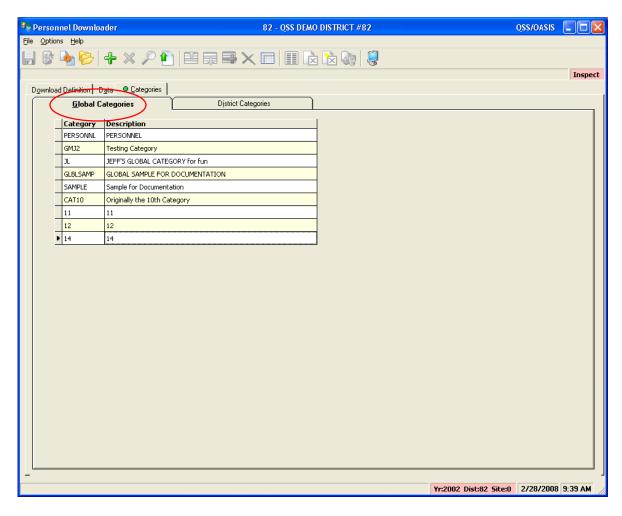
- Filter by owner and/or category
- Choose data file, then click on output method (Grid, Excel, Excel Wizard, Desktop Data File)
- Field headings will be included if you selected that option and they are available
- Use "Lines to retrieve" to limit download size to check your data



# Personnel Downloader (PDL) Sample Grid Output

		_				
np name, last	Emp name, first	Gender	Bargaining unit	Barg unit name	Birth date	
⇒11	"SUZANNE"	"F"	01	"TEACHERS"	06/02/1977	<u> </u>
	"LINDA"	"F"	02	"CLASSFIED"	04/15/1936	
-11	"ANNE"	"F"	02	"CLASSFIED"	10/08/1953	
	"JOANNE"	"F"	01	"TEACHERS"	01/01/1954	
	"LAURANCE"	"M"	01	"TEACHERS"	06/15/1942	
	"RICHARD"	"M"	02	"CLASSFIED"	01/17/1949	
	"ANDREA"	"F"	02	"CLASSFIED"	11/17/1947	
	"KATHLEEN"	"F"	01	"TEACHERS"	08/09/1940	
P/	"BARBARA"	"F"	02	"CLASSFIED"	07/28/1947	
	"WILLIAM"	"M"	02	"CLASSFIED"	07/03/1943	
	"CARL"	"M"	01	"TEACHERS"	04/18/1958	
	"FRANCINE"	"F"	01	"TEACHERS"	05/17/1955	
$\mathbb{T} = \mathbb{T}_n$	"GLORIA"	"F"	01	"TEACHERS"	11/12/1943	
	"JUNE"	"F"	01	"TEACHERS"	11/14/1946	
D1 /"	"ROSE"	"F"	03	"MANAGEMENT"	08/10/1951	
	"G. DIANE"	"F"	03	"MANAGEMENT"	12/29/1943	
	"BETH"	"F"	02	"CLASSFIED"	10/17/1957	
	"DIANE"	"F"	01	"TEACHERS"	03/19/1952	
	"ISABELL"	"F"	02	"CLASSFIED"	10/03/1934	
4	"ANNA"	"F"	02	"CLASSFIED"	07/10/1955	
п	"SHIRLEY"	"F"	02	"CLASSFIED"	07/23/1946	
I"	"ELIZABETH"	"F"	01	"TEACHERS"	02/23/1960	
	"BETH"	"F"	01	"TEACHERS"	05/20/1950	
/"	"SUZANNE"	"F"	01	"TEACHERS"	09/29/1950	

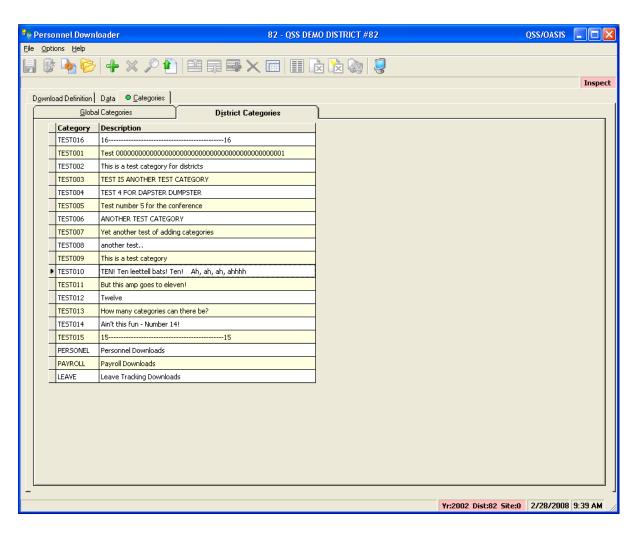
# Personnel Downloader (PDL) Global Categories



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



# Personnel Downloader (PDL) District Categories



- Maintenance security controlled
- Used in District Definitions
- Logon district access only



# Personnel Downloader (PDL) Using the "@" Sign with Categories

 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.

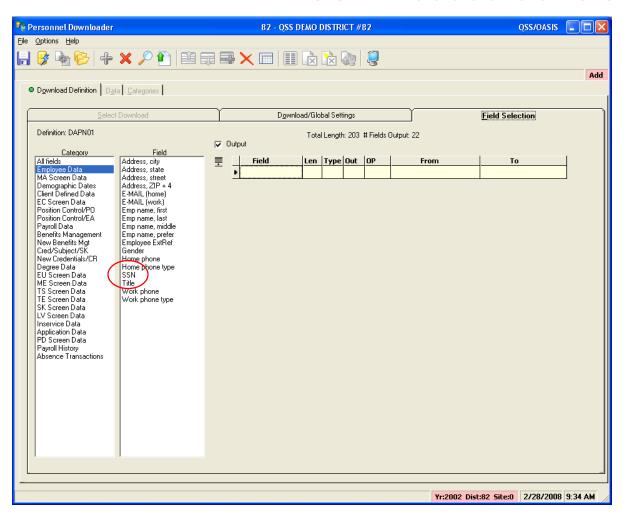
# Personnel Downloader (PDL) Using the "@" Sign with Categories

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.



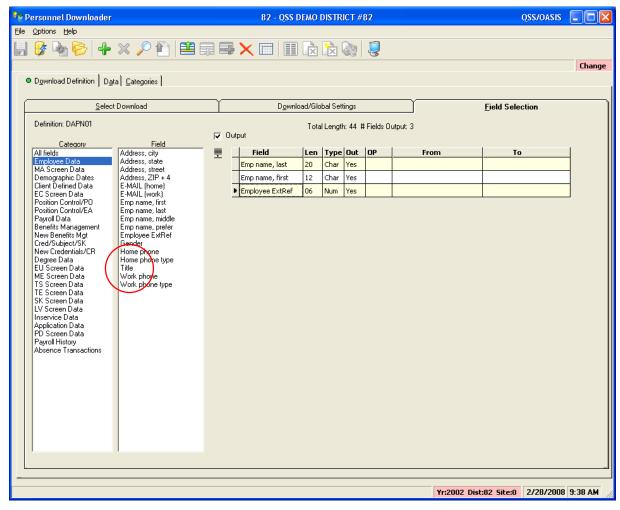
### Personnel Downloader (PDL) SSN Access Control



- 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



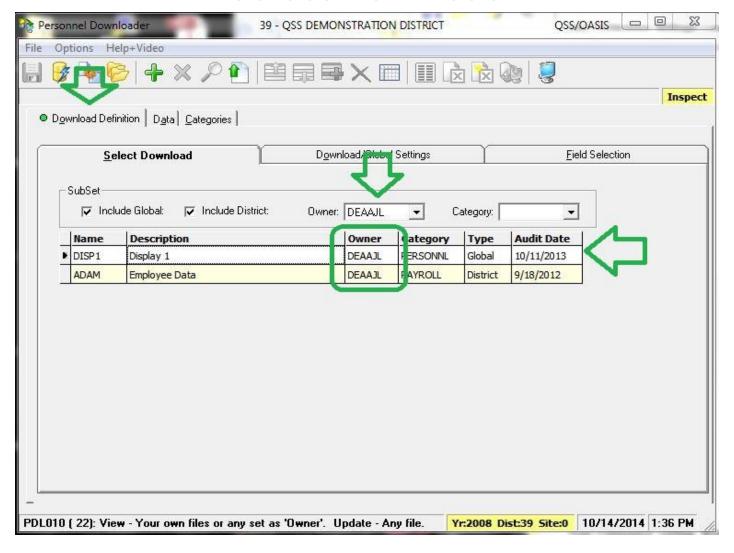
### Personnel Downloader (PDL) SSN Access Control



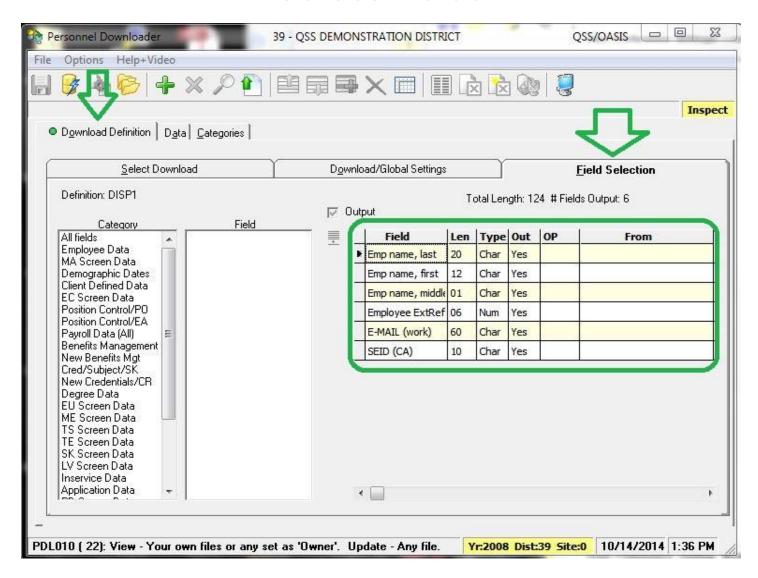
- In this example, the user DOES NOT have access to SSN
- Notice the SSN field is missing from the list



### Personnel Downloader (PDL) Select Download



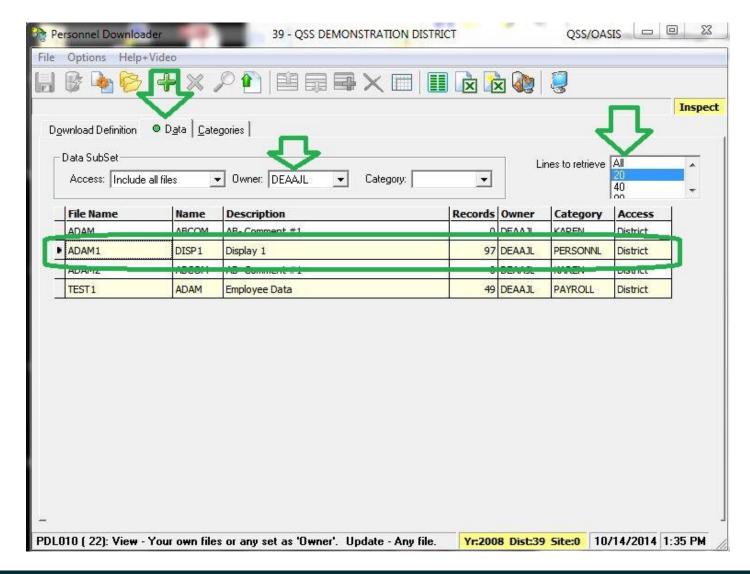
### Personnel Downloader (PDL) Select Fields







### Personnel Downloader (PDL) Data is Produced!



### Personnel Downloader (PDL) Data in Excel

<b>C</b> :	1 1 1 - C1 - C1	à abe		ExcelData0.0306927 -	Microsoft Excel		
	Home Insert	Page Layout	Formulas Data	Review View			
Pi	Calibri  B I U	- 11 - A		General	, 4.0 .00 Cor	nditional Format	Ce
Clip	oboard 5	Font	G Alignment	G Numb		Styles	Style
	A1	▼ () f <sub>x</sub> E	mp name, last				
	А	В	С	D	Е	F	(
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	Н	1009			
6	FERNDOCK	AVERY	Р	1010			
7	EMPLOYEE	AMAZING		1011		8787343412	
8	PEABODY	PEPPER		1013		7830	
9	PEABODY	MR		1015		1414	
10	BUILDER	bob		1016			
11	Soft	JASPER	Α	1020			
12	COAST	BARBARY		2000			
13	ATHENA	MARGARET		2001		7676767676	
14	NUMBER1021	MR		1021			
15	SMITH	JANE	Α	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	Α	1026	cnewbee@tus	6578923412	
22							



#### Personnel Downloader (PDL) Q & A / Live Demo

Enter Your Questions

Raise Your Hand

Watch the Demo



