POLYDATA

HR Dashboards

Department Administrators

December 2010
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HR Dashboards

- Compensation
- Department Employees
- Employee Job History
- Translation Values
Accessing HR Dashboards

- Log into mycalpoly.edu
- Under the “Single Click Access To” channel, click PolyData Dashboards
Accessing HR Dashboards

- Click on “Human Resources (State)”

- Select appropriate Dashboard set:
  - Job Information for Dept Administrators
  - Translation Values
Dashboard Query: Compensation

- View current and future salaries for active employees
- Does not contain history
  - Use the Employee Job History Dashboard to view a complete history
Dashboard Query: Department Employees

- View basic job information for current employees in your department, including those on leave
Dashboard Query: Employee Job History

- View a complete job history for an employee (including historical, current and future job rows)
  - Listed in descending order by effective date

- Also accessed from all Job Information for Department Administrator Dashboards by clicking on the employee’s name
Dashboard Query: Translation Values

- Provides valid values for each of the fields used in the HR Dashboards.
  - Select a field to view the valid values.
  - Field descriptions for the dashboard fields are available on the PolyData Dashboard website.
General Information

- Drill down to Employee Job History Report:
  - Click on Preferred Report Name or Primary Report Name

- When an employee has multiple job rows, they are listed by:
  - Empl Rcd (ascending order)
  - Effective Date and Effective Sequence (descending order)

- There is no student data in the HR Dashboard
  - Use LCD Dashboard
Terminology

“Code” vs “Descr” (ex: Grade Range Code vs. Grade Range as seen in Department Employees “Column Selector 3”)

Exceptions:

- Job Code = Code
- Deptid = Code
Important Information Box
“About This Page” link: HR Dashboard information page
Security

- HR Department Security has been applied to the HR Dashboards. This is the same as your security in PeopleSoft.
Security

- Some of the information displayed on the HR Dashboard is confidential and must be protected from unlawful or inappropriate disclosure.

- For more information, please click on “About this Page” link, then click on the link in “Using Confidential HR Data”
Prompts

- Forcing No Results
  - The ‘Preferred Report Name’ prompt defaults to all ‘0’ s on the Employee Job History Dashboard
  - Must clear ‘0’ s prior to using prompts
  - Can save selection as your default instead of no results for future use
Prompts

- Prompts are used to narrow down your query results
- Click on the (Multi-Select dialogue box)
Prompts: Multi-Select

- 2 ways to select data to limit your query results
  - 1. Match
  - 2. Edit
Prompts:
Multi-Select - Match

- Use “Match” if you know what you want to limit the prompt to

To select all data
To select only highlighted data

Returns only first 256 results. Click “More” to increase # of results in increments of 256
Prompts:
Multi-Select - Edit

- Use the “Edit” feature if you know the EXACT value

  - Click “Edit”
  - Type the data (best used for Deptid, Emplid, and Last Name)
  - To add another value to Edit box use “Enter” key on keyboard then add next value
Prompts

- Date “Between” Prompt
  - Use as a “Less Than” limit by leaving the beginning date blank
  - Use as a “Greater Than” limit by leaving the end date blank
  - If you have a date range, you may enter both dates
Prompts

- Values may be selected in one of the prompt fields
- Values may be selected in additional prompt fields to narrow your results
- Once you have selected your prompts, hit “Go”
Selectors

- First, add a prompt and click “Go”
Selectors

- Selector function allows for customizing the report to meet your needs
  - Select the desired fields from the drop down lists

- Yellow column header signifies which columns are selectors

- Once you have selected your column choices, hit “Go”
Views
Views

Dashboard Views allows for customizing the report to meet your needs

- Select the desired view from the drop down list
Views

- **Download View**
  - Enables sorting of data by clicking on column headers. To sort by multiple columns, hold the Control key and click the column headers in the order that you would like your results sorted by (click the header again to toggle between sorting in ascending and descending order).

- **Employee Listing by Department**
  - For users with access to multiple departments, quickly limits results to one department.

- **Employee Listing**
  - Lists all employees within the department(s) you have security to view.

- **Filters View**
  - Lists limits for that Dashboard.
Run the Dashboard
Saving Selections
Saving Selections

To save the prompts you selected for future queries:

- Click Page Options
- “Save Current Selections”
- “For Me”
- Name the current selection
- “Ok”
Saving Selections

➢ To use a prompt you previously saved:
   - Click Page Options
   - “Apply Saved Selections”
   - Select appropriate selection

➢ To clear a prompt you previously selected:
   - Click Page Options
   - “Clear My Selections”
Exporting Results

➢ Once you get your desired results you may want to print or download the data
  • At the bottom of the results you see
  • If you select Print, it will give you exactly what you are viewing
Exporting Results

If you select Download, you’ll have these options:

- If you choose to Download to Excel, Excel 2000, Powerpoint or Web Page, the results will be as you see them in your view. To avoid merged cells, select the view type “Download View” first, then Download to Excel.

- Download Data is a CSV file. You can format the CSV and save it as an Excel document.
HR Dashboard Queries: Try them yourself!

- Compensation
- Department Employees
- Employee Job History
- Translation Values
Resources

- Human Resources 756-5440
  - Brooke Blythe
  - Cheryl May
  - Chris Blackburn
  - Margie Coolidge
  - Joyce Haratani
- Academic Personnel 756-5281
  - Sharon Chan
- polydata-hr-support@calpoly.edu
- ITS Webpage: http://polydata.calpoly.edu/dashboards/index.html
- HR ITS Webpage: http://polydata.calpoly.edu/dashboards/dash_page
- HR ITS Webpage: http://polydata.calpoly.edu/dashboards/hr_state/index.html
- Coming soon: HR Dashboard Help Information
Questions?