POLYDATA

HR Dashboards

Staff

October 2010
Agenda

- HR Dashboard Queries
- Accessing HR Dashboards
- Important Information box
- Security
- Prompts
- Selectors
- Views
- Run the Dashboard
- General Information
- Terminology
- Saving Selections
- Exporting Results
- Try them yourself!
- Resources
HR Dashboards

- Compensation
- Contact Information: On-Campus
- Department Employees
- Department Positions
- Employee Job History
- HR 101 Form Data
- Probationary Employees
- Temp Assignments & Leaves
- Personal Contact Information
- Translation Values
Accessing HR Dashboards

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

- Click on “Human Resources (State)”

- Select appropriate Dashboard set:
  - Job/Position Information
  - Personal Contact Information
  - 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:
Contact Information - On-Campus

- View department, email address and phone information for current employees, including those on leave

- Possible uses:
  - Template for your department roster
  - On-campus mailings
Dashboard Query: Department Employees

- View basic job information for current employees in your department, including those on leave
Dashboard Query: Department Positions

- Lists all positions in your department, including inactive positions

- Two queries within one Dashboard
  - Filled Department Positions
    - Position Listing with Incumbent
    - Download View
    - Filters View
  - Vacant Department Positions
    - Vacant Position Listing
    - Download View
    - Filters View
Dashboard Query: Department Positions
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

- All Job/Position Information Dashboards link to this Dashboard by clicking on the employee’s name
Dashboard Query:  
HR 101 Form Data

- Assists with the HR 101 form completion process
- Columns are listed in the order of the HR 101 Form
- Includes current and future job rows for active and inactive employees
Dashboard Query: Probationary Employees

- Used to track employee probationary status
- Includes current and future job rows for active employees in a probationary status, including those on leave
Dashboard Query: Temp Assignments & Leaves

Used to track temporary appointments and leaves of absence

Two queries within one Dashboard

- Temporary Assignments
  - Temporary Assignments Listing: Lists only employees in a temporary assignment
  - Download View
  - Filters View

- Leaves
  - Leave Listing: Lists only employees on a leave of absence
  - Download View
  - Filters View
## Dashboard Query: Temp Assignments & Leaves

### Temporary Assignments

<table>
<thead>
<tr>
<th>Preferred Report Name</th>
<th>Empid</th>
<th>Emppl Record</th>
<th>Emppl Status</th>
<th>Expected End Date</th>
<th>Pay End Date</th>
<th>FERP Eligibility End Date</th>
<th>FTE</th>
<th>Deptid Ldescr</th>
<th>Jobcode</th>
<th>Position</th>
<th>Union</th>
<th>Emppl Class</th>
<th>Number of Active Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

### Leaves

#### No Results

The specified criteria didn't result in any data. This is often caused by applying filters that are too restrictive or that contain incorrect values. Please check your Request Filters and try again. The filters currently being applied are shown below:

- Deptid is equal 1
- and Active Employees Criteria
- and Current and Future Jobs Criteria
- and Leaves Criteria
Dashboard Query: Personal Contact Information

- List of personal information for current employees

- Possible uses:
  - Emergency Contact List
  - Off-campus mailings
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.
Important Information Box

The data available on this PolyData Dashboard page was last refreshed from PolyData on Monday, October 11, 2010 at 12:52:19 AM.

WARNING: This page is filtered beyond the criteria to include the department(s) you are authorized to view. Click link below for complete list.

View authorized department(s)
Important Information

“About This Page” link: HR Dashboard information page

Today is Monday, October 11, 2010.

The data available on this PolyData Dashboard page was last refreshed from PolyData on Monday, October 11, 2010 12:52:10 AM.

⚠️ WARNING: This page is filtered beyond the criteria to include the department(s) you are authorized to view. Click link below for complete list.

View authorized department(s)

About this Page
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 go to:
  
  http://www.afd.calpoly.edu/hr/docs/employee/Protecting%20Confidential%20Employee%20Data.pdf
Prompts

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

- Forcing No Results
  - The ‘Preferred Report Name’ prompt defaults to all ‘0’s on the following dashboards
    - Employee Job History
    - HR101 Form Data
Prompts: Multi-Select

Select the data for your query

Use “Match” if you know exactly 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 increment of 256

- Click “OK”
Prompts: Multi-Select

To use the “Edit” feature

- Click “Edit”
- Type the data (must be exact – best used for Emplid)
- 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
**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”
### Job/Position Information

#### Compensation Prompt

<table>
<thead>
<tr>
<th>Deptid</th>
<th>Deptid Ldescr</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Preferred Report Name</th>
<th>Preferred Last Name</th>
<th>Preferred First Name</th>
<th>Primary Last Name</th>
<th>Primary First Name</th>
<th>Emplid</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Empl Type</th>
<th>Empl Class</th>
<th>Jobcode</th>
<th>Jobcode Ldescr</th>
<th>Union</th>
<th>Primary Job</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

[Go]

#### Compensation

- **Show Column 1:** Preferred Report Name
- **Show Column 4:** Stipend Staff Amount
- **Show Column 2:** Position
- **Select a View:** Employee Listing by Department

Deptid Ldescr: AA Technical Services
Dashboard Views allows for customizing the report to meet your needs

- Select the desired view from the drop down list
Views

- 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

- 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)

- Filters View
  - Lists limits for that Dashboard
Run the Dashboard
General Information

- Drill down to Employee Job History Report:
  - Click on Preferred Report Name or Primary Report Name (except on Personal Contact Information Dashboard)

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

- “Code” vs “Descr” (ex: Grade Range Code vs. Grade Range)

- Exceptions:
  - Job Code = Code
  - Deptid = Code
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
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!

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- Contact Information: On-Campus
- Department Employees
- Department Positions
- Employee Job History
- HR 101 Form Data
- Probationary Employees
- Temp Assignments & Leaves
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- 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

- Coming soon: HR Dashboard Help Information
Questions?