POLYDATA
HR Dashboards

Security Reports
What this presentation covers:

- Accessing the HR Dashboards
- Accessing the Security Reports Dashboard
- Important Information box
- Security
- Prompts
- Views
- Running the Dashboard
- Exporting Results
- Resources
Accessing HR Dashboards

- Log into mycalpoly.edu
- Under the “Single Click Access To” section, click PolyData Dashboards
Accessing Security Reports Dashboard

- Click on “Human Resources (State)”

- Select Security Reports
Security Reports Dashboard

- **First Tab: Department Changes**
  - View employees who have had a department change effective in the past 60 days

- **Second Tab: Separations**
  - View employees who have had a separation with an effective date in the past 60 days
Accessing Translation Values Dashboard

- Click on “Human Resources (State)"

- Select Translation Values
Translation Values

- Provides valid values for fields used in all 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
Important Information

“About This Page” link: Will take you to the HR Dashboard information page on the ITS website
Some of the information displayed on the HR Dashboard is confidential or sensitive and must be protected from unlawful or inappropriate disclosure.

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

- Prompts are used to narrow down your query results.
- The Effective Date defaults to 60 days earlier than the current date. Change the date and click ‘Go’ to change your results.
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
Views

Dashboard Views allow 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**
  - Merges cells one row to the next that contain like values

- **Filters View**
  - Lists limits for that Dashboard
Running the Dashboard

When the Dashboard opens the results of the query will be displayed with the default filters. If you change the date filter, you will need to run the query by clicking the ‘GO’ button next to the date prompt.
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:

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Exporting Results

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- 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.

- Reminder: Delete any downloaded documents once they are no longer needed.
Resources

- Human Resources 756-5440
  - Chris Blackburn
- 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_pages/hr_state/index.html
- Coming soon: HR Dashboard Help Information