

**Los Angeles County
Office of Education**

Serving Students ■ Supporting Communities
Leading Educators

PC Products

Labels, Lists, and Letters User Manual

Hess and Associates

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Section 1

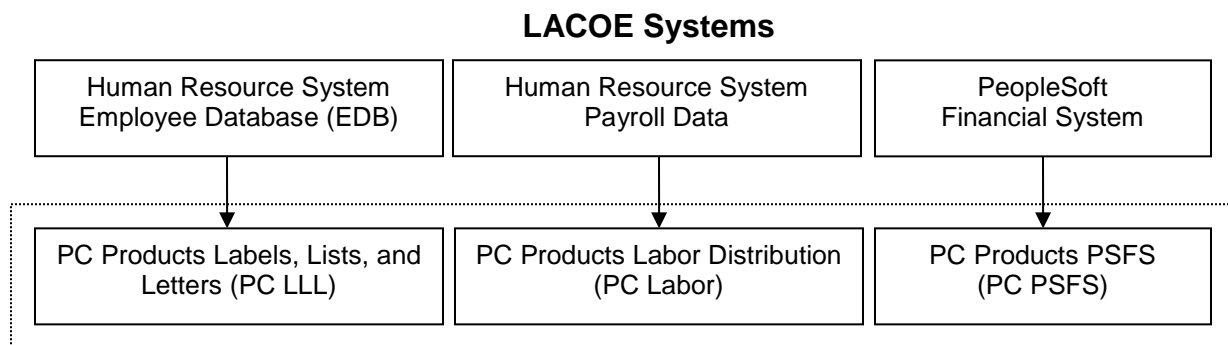
Introduction

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PC Products Overview

PC Products is a suite of complementary database reporting applications developed by Hess and Associates. These optional applications are available individually or in combination to local educational agencies (LEAs) that use LACOE's Human Resource System (HRS) and/or PeopleSoft Financial System (PSFS) through a contractual agreement with LACOE.

PC Products includes three applications:



PC Products provide tools to help LEAs more efficiently analyze and utilize their employee, payroll, and financial data extracted from HRS and PSFS. Below are some of the benefits the applications provide:

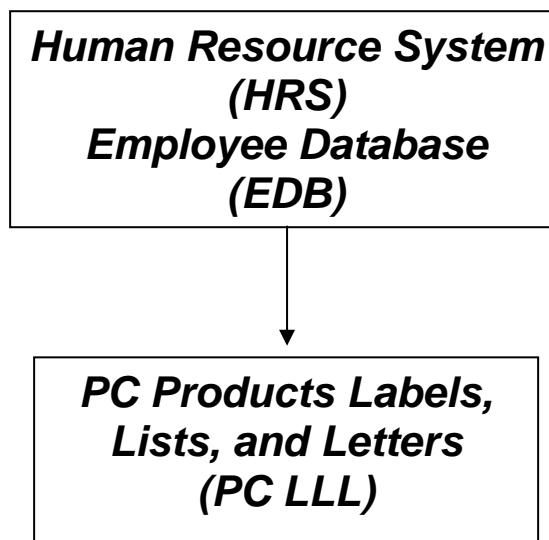
- Create queries to easily obtain needed information
- Explore district employee, payroll, and financial data for multiple fiscal years
- Generate standard reports that answer “frequently asked questions” about the data
- Create custom reports to meet each agency’s unique requirements
- Easily transfer data to spreadsheet, database, and word processing applications
- Generate lists, form letters, and mailing labels
- Share the data with many users on the district’s local area network (LAN)
- Convenient data downloads to keep PC Products updated
- Agency control over application availability and access

PC LLL Overview



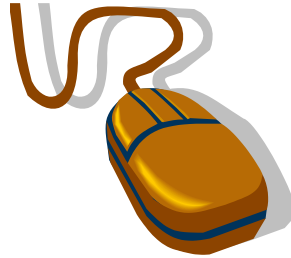
PC LLL enables users to view district data from LACOE's Human Resource System (HRS). Features of the application include:

- Versatile access to district employee records
- Fixed reports such as telephone directories and salary scatter grams
- Ability to create custom mailing labels, lists, reports, and letters using data from the HRS Employee Database (EDB), Position Control Data Base (PCDB), and Control Data Base (CDB)
- An option to include credential data from the California Commission on Teacher Credentialing (CTC)
- Easy export of data files in various file formats
- Daily data updates available for download from LACOE's RAD website
- Agency control over application availability and access



Intended Audience for this Manual

This manual aims to provide users as much useful information as possible about the PC LLL reporting database application.



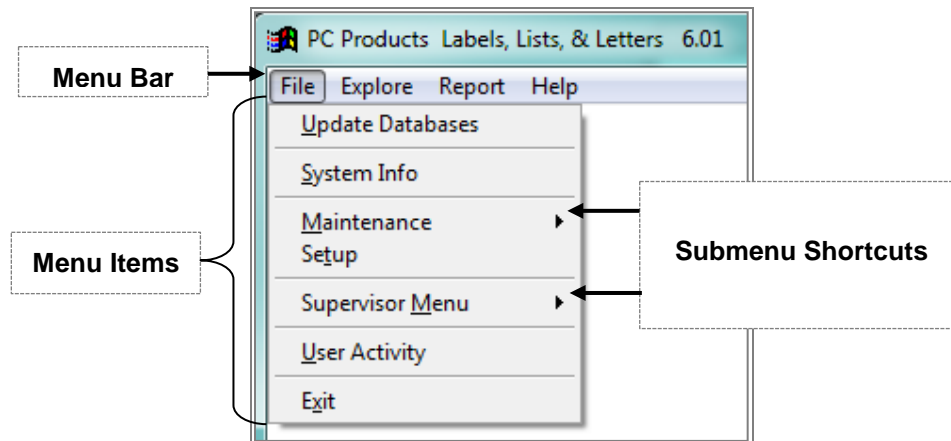
The manual assumes users:

- Have basic computer navigational skills
- Know basic Windows terminology
- Are familiar with the agency's HRS data and terminology

Conventions Used in this Manual

When instructions state, “Select **File** | **Exit** from the menu”:

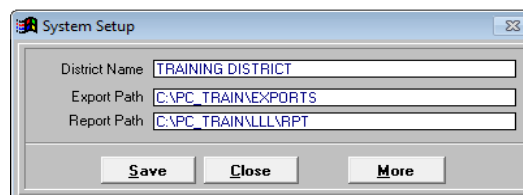
1. Click on the **File** menu of the application’s main menu bar. This is the horizontal list of options displayed at the top of the PC Products Labels, Lists, and Letters window. The program will display a vertical list of menu options.



2. Select **Exit** option. Click **Yes** to quit Labels, Lists, & Letters. PC LLL will close.



3. Command buttons are accessed from the application’s main menus. There are two ways to execute commands. Click the command button or press **Alt + first letter** of command under these conditions:
 - i. First letter of command buttons have underscore, e.g., **S**ave.
 - ii. Command buttons are located in PC LLL windows and not within menu options displayed, e.g., **Alt + S** for **S**ave; **Alt + C** for **C**lose; **Alt + M** for **M**ore in System Setup window.



Confidentiality

This manual includes real sample PC LLL screens and reports to provide a more accurate view of the system. To protect employee confidentiality, training databases are used for all PC Products applications. Sensitive data such as names, addresses, telephone numbers, social security numbers, employee identification numbers, and insurance information is fictional and does not represent real data.

Technical Assistance and Support

The following resources are available to answer questions regarding PC LLL, provide technical assistance, system support, and user training.

- **Online Help** is just a click away. Press the **Help** button found on most PC LLL windows to access the online help menu.
- **PC LLL User Manual** (this document) answers many frequently asked questions and provides detailed instructions for using key application features. Click the link below to download the PDF version of the user manual from the Resources section of the PC Products website.

<https://www.lacoe.edu/BusinessServices/SchoolFinancialServices/PCProducts.aspx>

- **Hess and Associates System Support Staff** provide comprehensive system support and technical assistance that extends beyond LACOE's normal operating hours. Select **Help | Support** from the application's main menu for current system support staff contact information.



- **LACOE PC Products Support Staff** provide administrative, system support, and technical assistance. Staff also conducts regularly scheduled training sessions at LACOE's Education Center West (ECW). Please call (562) 922-8683 or email PCBudgetPCProductsSupport@lacoe.edu for assistance.

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Section 2

Getting Started

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What Users Need to Get Started

To access PC LLL users need:

- PC LLL software installed on the user's PC and/or the district's local area network (LAN)
- A valid PC LLL user ID and password

Please contact your district's in-house technology support staff or contact PC Products System Support if you have questions or need additional information about the items listed above.

Log In PC LLL

To log in PC LLL:

1. Double click the PC LLL icon on the computer desktop.
2. Select **User ID** from the drop-down list.
3. Enter **Password**.
4. Click **Login**.



The screenshot shows a login window titled "PC Products Labels, Lists, & Letters" with a copyright notice "Copyright Hess & Associates Inc 2013". It features a "User Id" dropdown menu set to "DEFAULT", a "Password" text box, and a "Change" button. At the bottom, there are "Login" and "Quit" buttons.

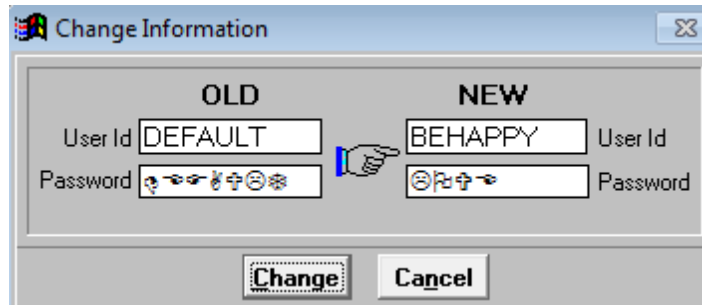
Change User ID and Password

To change the user ID and/or password from the Login window:

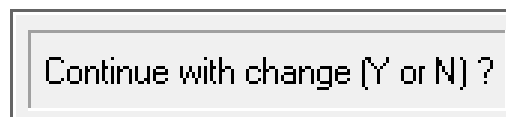
1. Double click the PC LLL icon on the computer desktop.
2. Select **User ID** from the drop-down list.
3. Click **Change**.



4. Enter old and new **User ID** and **Password** and click **Change**.



5. Enter **Y** at prompt to change your password.



6. Click **Login** to access the application or **Quit** to exit when the Login window appears.

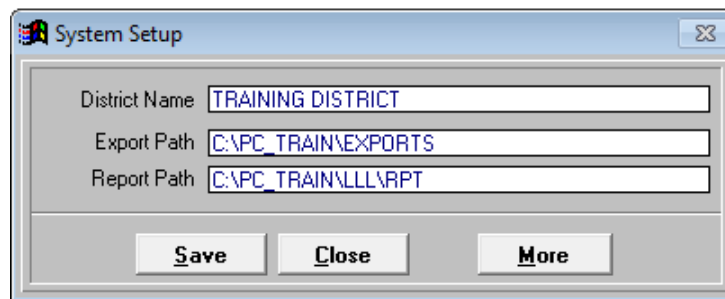


Verify System Setup and User Paths

The **System Setup** and **User Paths** display the district name and various paths for key system files. The System Setup and User Paths windows share export and report paths. Changes to either path on the System Setup window will be reflected on User Paths window.

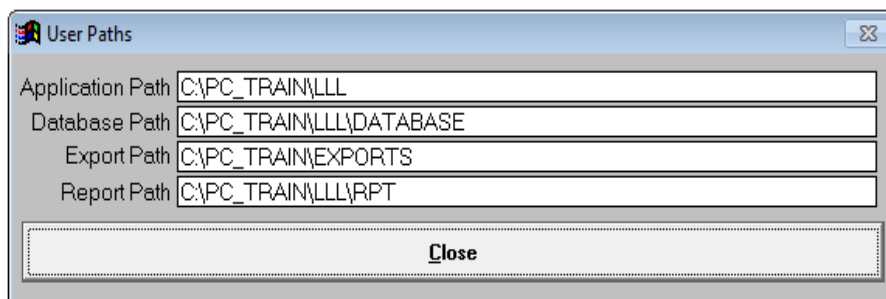
To verify system setup:

1. Select **File | Setup** from the menu.
2. Review District Name, Export Path, and Report Path.
3. Click **Save** if changes are made.
4. Click **Close** to exit.



To verify user paths:

1. Select **File | Setup** from the menu.
2. Click **More** on System Setup window. See illustration below.
3. Review the application, database, export, and report paths.
4. Click **Close** to exit.



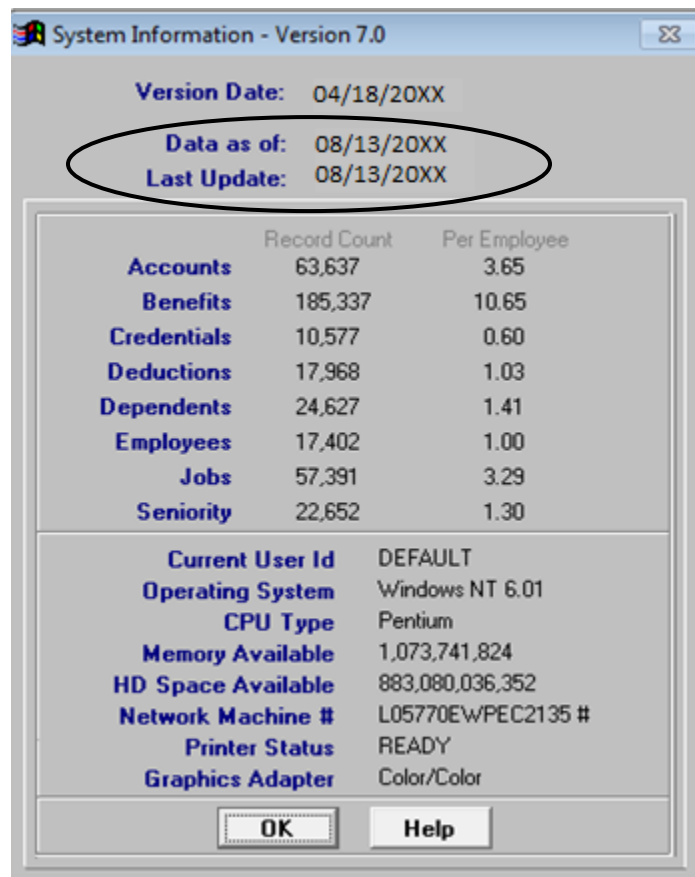
Verify Last Data Update

To verify when PC LLL data was last updated:

1. Select **File | System Info** from the menu.
2. Review dates shown in the *Data as of* and *Last Update* fields. These dates reflect when PC LLL was last updated, not the data “as of” date. If you did not download today’s file, we suggest you download it from RAD before proceeding with the update process to ensure you have the latest file. Data in PC LLL is as of the close of the previous business day. The following message will appear if a user attempts to update an older PC LLL data file.

The data you are updating was created 07/06/XX. Are you sure you want to update LLL, Y or N ?

3. Click **OK** to exit.



PC LLL Update File

The data file containing the previous business day's HRS data is normally available for download from the LACOE RAD website each morning.

- The data file contains new program updates. Following the correct download and update process ensures that both data and program updates are implemented.
- Each agency should have a person who updates the district's PC LLL data each week and at least one backup person with necessary RAD security access to download update files.

Update PC LLL Data

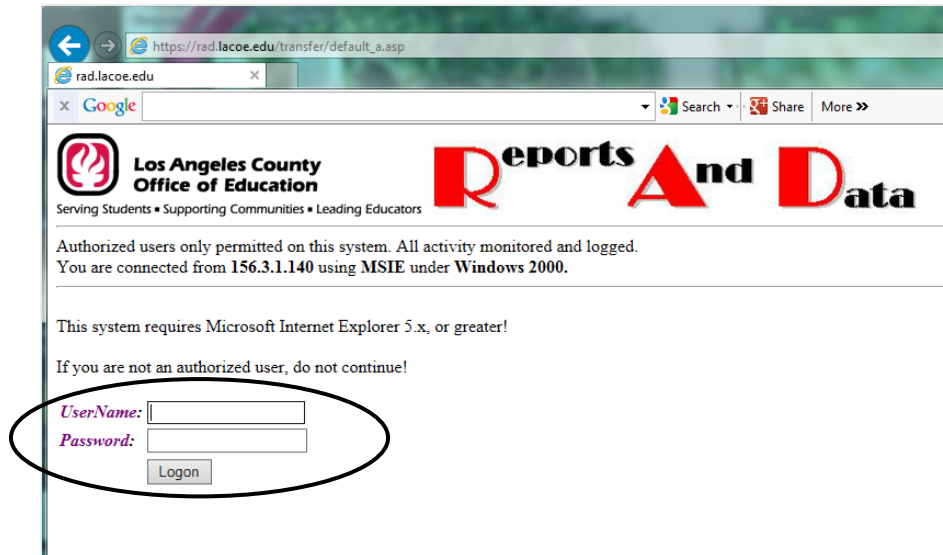
PC LLL uses district Employee Data Base (EDB) data downloaded from the Human Resource System (HRS). Below are instructions for updating PC LLL data.

File Download Procedure

Look for the PCPD-LLL.ZIP file in the appropriate PC Products folder before downloading the latest data file. Users can rename the file to use as a backup before downloading the new file. Otherwise, it will be overwritten when the new file is saved. Also make sure PC LLL is closed before downloading the file.

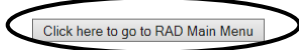
To download the PC LLL data file:

1. Go to RAD **website** at <https://rad.lacoe.edu> in your web browser.
2. Enter your RAD **UserName** and **Password**.
3. Click **Logon**.



4. Click **Click here to go to RAD Main Menu**.

RAD Announcements



Date	Message
8/7/20XX	<p>ALL DISTRICTS:</p> <p>The 4th Quarter Preliminary Interest Letter is now available online at LACOE's website: http://www.lacoe.edu/BusinessTechnology/SchoolFinancialServices/PeopleSoft/RevenueApportion.aspx:</p> <p>If you have any questions, please call Nimfa Andres @(562)922-6451 or e-mail Andres_Nimfa@lacoe.edu</p>
8/25/20XX	<p>All Districts:</p> <p>Have you heard of the Business Enhancement System Transformation (BEST) Project? What is it? To find out and stay informed about the BEST Project, click on the link www.lacoe.edu/best.</p>

5. Click **Download**.



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Reports And Data

Authorized users only permitted on this system. All activity monitored and logged.
User: from 156.3.1.140 using MSIE on Windows 2000.

Home:

For **PeopleSoft reports and interfaces**, please contact Jocce Panganiban (562-922-6165).
For **HRS related issues**, Districts A-L: please contact Yesenia Requena (562-922-6609); Districts M-Z: Linda Williams (562-922-6535); or Erwin Labasan (562-922-6339).

[SFS \(School Financial Services\)](#)

Download
[Upload](#)

[Report Access and Distribution \(Report Selector Version 2.0_r1\)](#)

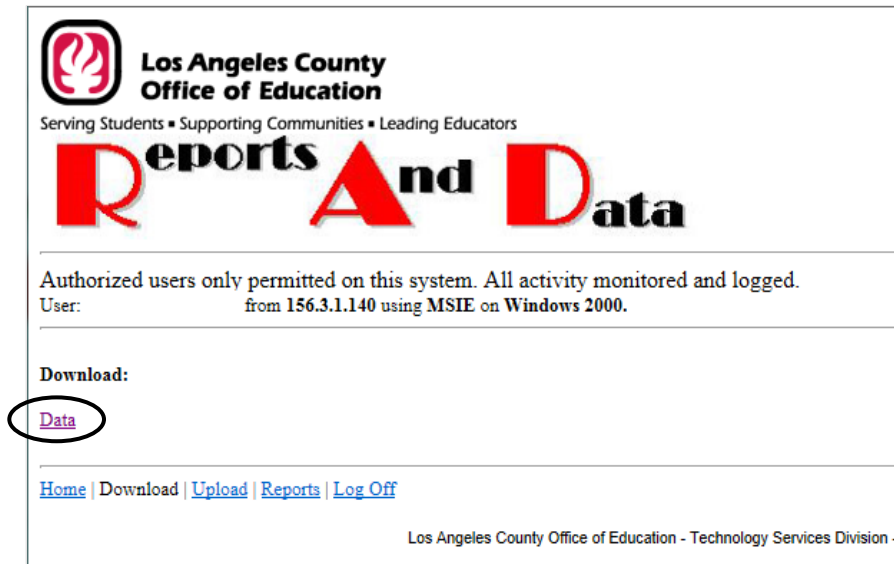
[HRS Reports](#)
[TSA Reports](#)


[Set Password](#)

[Home](#) | [Download](#) | [Upload](#) | [Reports](#) | [Log Off](#)

Los Angeles County Office of Education - Technology Services Division - All Rights Reserved

6. Click **Data**.



 **Los Angeles County Office of Education**
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Reports And Data

Authorized users only permitted on this system. All activity monitored and logged.
User: from 156.3.1.140 using MSIE on Windows 2000.

Download:

Data

[Home](#) | [Download](#) | [Upload](#) | [Reports](#) | [Log Off](#)

Los Angeles County Office of Education - Technology Services Division -

7. Select **PC Products-LLL** from *Download Item* list and click **Continue**.

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Report

Authorized users only permitted on this system. All activity monitored and log
 User: from 156.3.1.140 using Navigator on Windows 2000.

Download Data:

District:
 999 - 10199 - Los Angeles County Office of Education

Download Item :

- PC Budgets data
- PCB
- Sacs Extract 01
- Actuals & Budgets Excel Extract
- Ledger Actuals Excel Extract
- PC Products-LLL**
- PC Products-Labor (XX-XY)
- PC Products-Labor (XY-XZ)
- PC Products-PSFS (XX-XY)
- PC Products-PSFS (XY-XZ)
- Cash Flow Statement

Continue

Los Angeles County Office of Education - Technolog

8. Click **Download**.

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Reports And Data

Authorized users only permitted on this system. All activity monitored and logged.
 User: 156.3.1.140 using Navigator on Windows 2000.

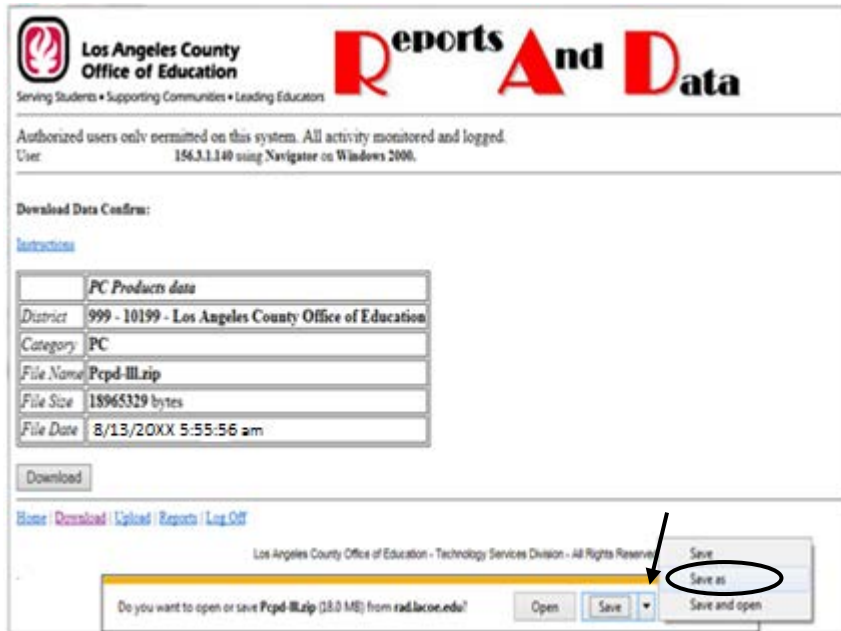
Download Data Confirm:

[Instructions](#)

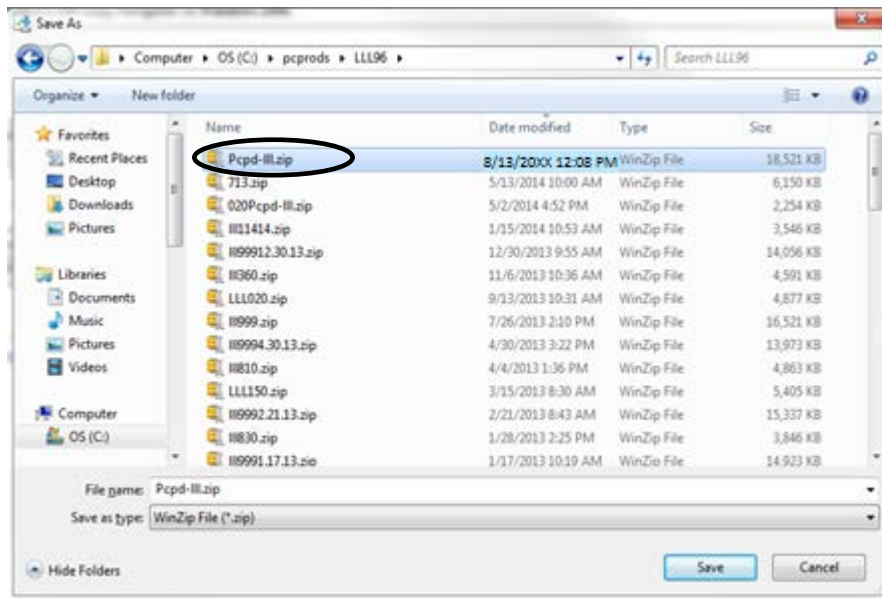
	<i>PC Products data</i>
District	999 - 10199 - Los Angeles County Office of Education
Category	PC
File Name	PePd-lll.zip
File Size	18965329 bytes
File Date	08/13/20XX 5:55:56 am

Download

9. Click the drop-down arrow next to **Save**. When the Download prompt appears, choose **Save as** to save this file to the appropriate drive.



10. Save the file to the PC LLL folder on the PC or server, e.g., **C:\pcprods\LLL96**.



11. Click **Yes** to replace file if prompt appears.

Update Procedure

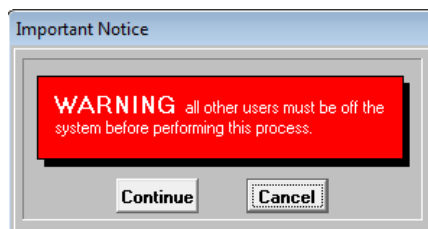
To update PC LLL:

1. Make sure all other users are logged out of PC LLL.

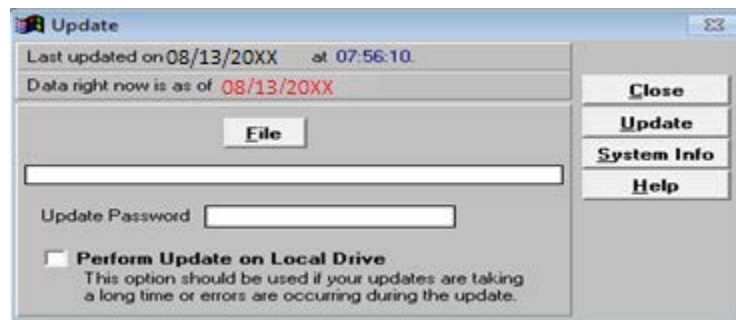


Select **File | User Activity** from the main menu to display a list of users currently logged in. Click **Close** to exit.

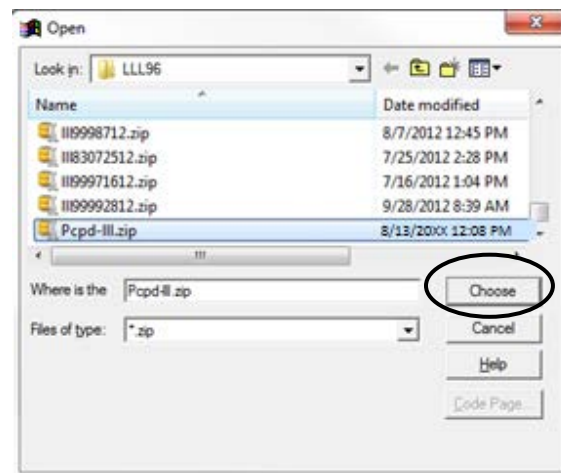
2. Select **File | Update Databases** from the menu.
3. Click **Continue**.



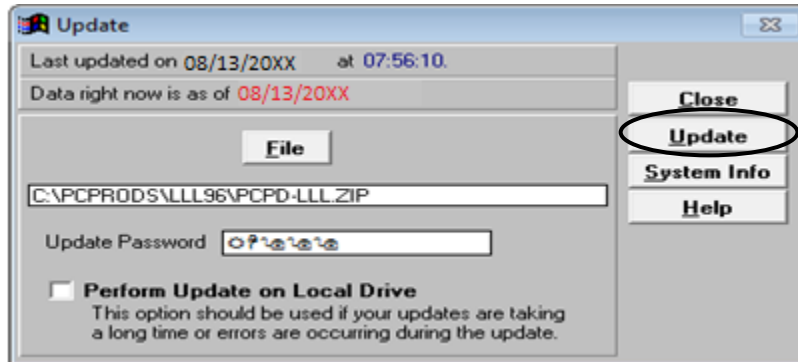
4. Click **File**.



5. Select data update file from the list.
6. Click **Choose**. The file path will appear in the gray box below **File** on the Update window.



7. Enter the **Update Password**.
8. Click **Update**. The update may take a couple of minutes depending on the amount of district data and the speed of the server.



9. Click **Close** when the following prompt will appears.



10. To verify the update, select **File | System Info**. The dates shown in the *Last Update* field will be the most recent update. For more information refer to **Verify Last Data Update** on Page II-7.
11. Click **OK** to exit.



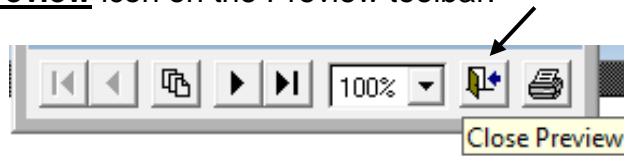
Log out of PC LLL by selecting **File | Exit** and clicking **Yes** so that other users will not be prevented from accessing the application.

Close the Current Program Window

Close the current window before accessing another or exiting the application if a program window such as Explore Assignments or Report Builder is displayed.

Any option listed below can be used to close an open program window:

- Press **ESC** until no window is displayed.
- Click **Close** if available on the current window.
- Press **Alt + C**.
- Click the **Close Preview** icon on the Preview toolbar.



Exit PC LLL

To exit PC LLL:

1. Press **ESC** one or more times to close any open windows.
2. Select **File | Exit**.
3. Click **Yes** to exit PC LLL. PC LLL will close.



Section 3

Report & Data

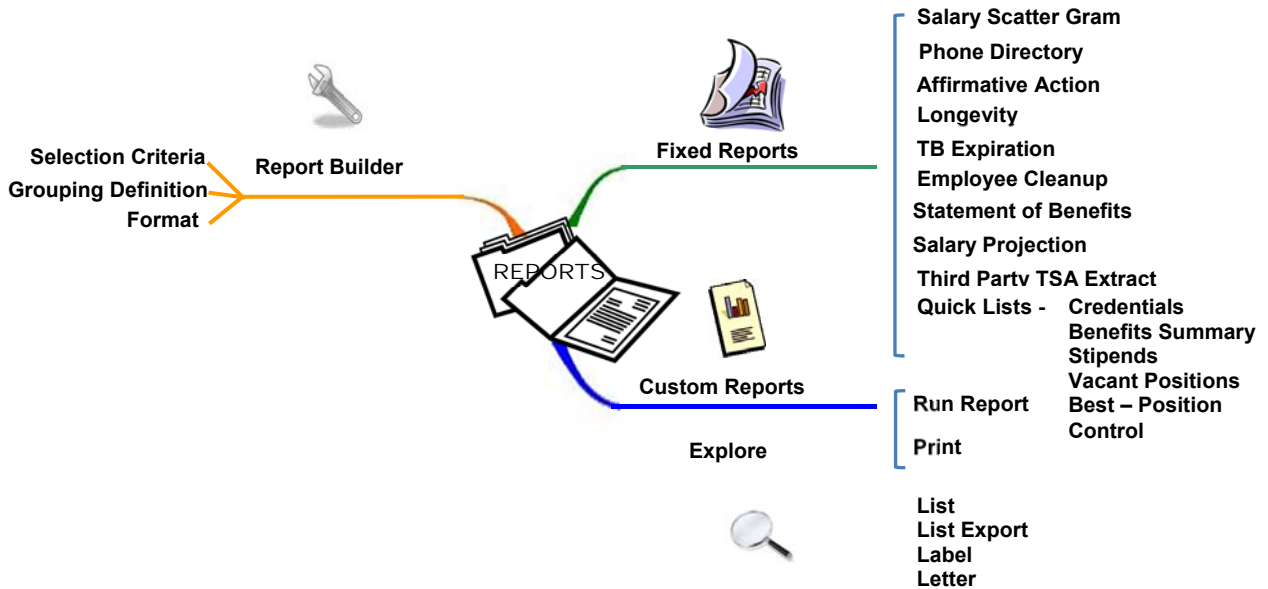
Overview


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Reporting Options

Reports can be generated from PC LLL using the four methods listed below. Each method includes the option to produce export files in various file formats such as Excel, DBF, and ASCII.

Report Options	Description
Explore	Report writing tool for creating simple lists and export files quickly and easily
Report Builder	Report writing tool for creating reports and export files using selection criteria, grouping definitions, and formatting specified by the user
Quick Report Builder	Report writing tool for creating reports and export files which includes pre-defined selection criteria, grouping definitions, and formatting that can be edited by user. It does not include label or letter output format options.
Fixed Reports	Pre-formatted reports that are part of the application



 Excel output files generally have additional report fields due to the suppression of select report fields in formatted output files.

PC LLL Data

PC LLL includes data extracted from the HRS Employee Data Base (EDB), Position Control Data Base (PCDB), and Control Data Base (CDB). Most EDB screens are replicated in PC LLL and displayed in the same window for easy access to each employee's HRS assignment records. PC LLL contains over 450 HRS data fields that can be used to create custom reports and export files. Refer to the **Appendix** on pages A-3 through A-19 for available report data fields.

HRS Employee Data Base

The Employee Data Base contains information for all individuals who have personnel, retirement, or payroll relationship with the agency. The Employee Identification Number (EID) is the key to accessing employee information. Job assignment, salary, retirement, personal, leave accounting, job history, benefit, voluntary deduction, credential, tax, and other types of employee information is included in PC LLL.

HRS Position Control Data Base

The Position Control Data Base is an optional HRS module used by districts to help monitor and manage district staffing. The position number is the key accessing position control information. Position number, job class, job type, control method, FTE, bargaining unit, work location, labor distribution, and other types of position information is included in PC LLL.

HRS Control Data Base

The Control Data Base is a group of agency and district maintained tables used to build and maintain the Employee Data Base and Position Control. Control tables allow for the automatic update of certain EDB and PCDB fields and are integral to time reporting and payroll processing. Job class, work location, work calendar, GTN, salary, stipend, bargaining unit, credential, permanency, payroll, benefit, and other HRS table information is included in PC LLL.



Please click this [HRS Manual](#) link to access and download the Human Resource System (HRS) Operations Manual which has detailed information about HRS fields and EDB screens reflected in PC LLL.

Section 4

Explore Features

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Explore LLL Data

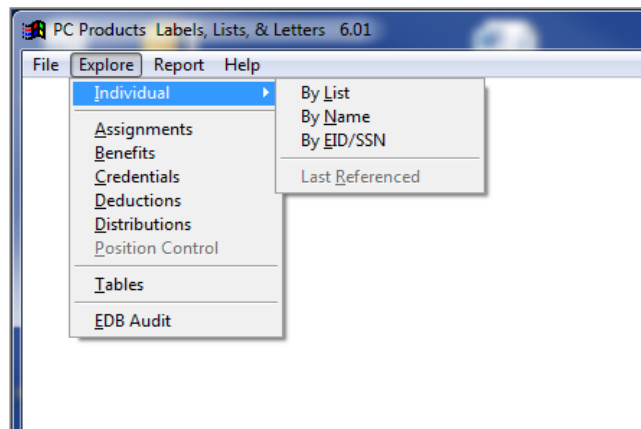
The PC LLL Explore menu provides easy access to employee, position control, and selected table data. There are options for performing custom searches, viewing, printing, and exporting data to other applications. The table below highlights Explore menu options and features.

Menu Item	Description	Custom Filter, Sort, Sum?	Print?	Export?
Explore Individual	Individual employee data by assignment, including most HRS EDB screens	No	Yes	No
Explore Assignments	Employee assignment compensation data	Yes	Yes	Yes
Explore Benefits	Employer benefit contributions	Yes	Yes	Yes
Explore Credentials	CTC credential information for prime assignment only, unless district subscribes for optional CTC information	Yes	Yes	Yes
Explore Deductions	Employee deductions and reductions	Yes	Yes	Yes
Explore Distributions	Assignment labor distribution	Yes	Yes	Yes
Explore Position Control	Position Control data	Yes	Yes	Yes
Explore Tables	Selected HRS table data	Yes	Yes	Yes
Explore EDB Audit	Identifies missing or invalid EDB data	No	Yes	No

Explore Individual Employee Data

PC LLL provides access to a significant amount of information about employees and non-employees that have a personnel, retirement, or payroll relationship with the district. Using the **Explore | Individual** menu users can:

- Access 18 screens of HRS information for a specific employee
- Search for an employee by name, EID, or scrolling through an employee listing
- Access the records of the last employee records viewed



Below are some of the HRS screens available:



Employee Search

Access employee records by scrolling through the employee list, searching by the employee name, or EID. Information for the last employee record viewed may also be retrieved by selecting the Last Referenced command.

By List

1. Select **Explore | Individual | By List** from the menu. The screen below will appear.
2. Filter the list of employees by using the **Status** and/or **Type** drop-down lists if desired.
3. Click an employee's name to display assignments in the Job Listing field. The prime assignment will be highlighted, but another assignment can be selected.
4. Click the button in front of the HRS screen data you wish to view.

The screenshot shows a 'Name Search' window with a list of employees and a 'Job Listing' table. The employee list includes names and EIDs, with 'ABBOTT, GLEN B.' selected. The job listing table shows various assignments with columns for ID, description, and dates.

Job Listing
082500-SS OTHER HOURLY ASSI 3 T 197201
080300-CERT CO-CURRICULAR 4 A 124001
080110-CERT WORKSHOP 5 T 123005
082500-SS OTHER HOURLY ASSI 6 T 127103
082800-SDC TEACHER SPECIAL * 7 A 121099

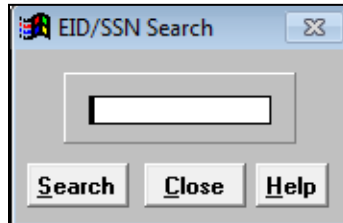
By Name

1. Select **Explore | Individual | By Name** from the menu.
2. Enter the last name or the first few characters of the employee's last name.
3. Click **Search**. A list of employees whose last names meet the search criteria will be displayed.
4. Double-click the employee's name to access the HRS screen menu.

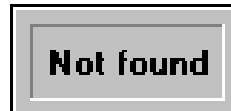
The screenshot shows an 'Employee Search' window with a search box containing 'ABBOTT'. Below the search box, there are radio buttons for 'Last name or in' and 'Entire name'. A list of search results is displayed, with 'AZ6185329 ABBOTT, GLEN B.' selected. The window also includes 'Search', 'Close', and 'Help' buttons.

By EID/SSN

1. Select **Explore | Individual | EID/SSN** from the menu. Search by SSN is only available to districts that have contractually agreed to include SSNs.
2. Enter the EID or social security number of the employee.
3. Click **Search**. If PC LLL finds an employee with that EID/SSN, it will display the HRS Screen Menu.

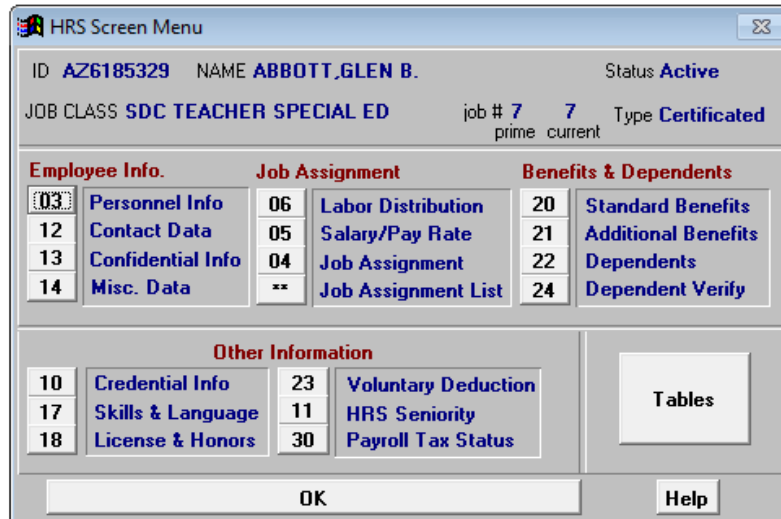


4. PC LLL displays the box below if the EID/social security number is not found.



HRS Screen Menu

The HRS Screen Menu window provides access to most HRS EDB screens including 17, 18, and 30. Use Explore Individual to access these three screens.



HRS Screen Menu Layout

HRS screens are grouped in the following categories:

- Employee Information
- Job Assignment
- Benefits and Dependents
- Other Information
- Voluntary Deductions/Seniority

HRS Screen Menu Options

- Click a screen button (e.g., 04) to access corresponding HRS screen data
- Click ** to select a different job assignment
- Click **Tables** to view control table data
- Click **Help** to access application help notes
- Click **OK** to close the window

HRS Screen Menu Controls

Click **OK** to return to the previous screen from any of the following screens.

To print screen information:

1. Click **Print**.
2. Change the printer options as appropriate.
3. Click **OK** to print.

View Other Job Assignments

To view the employee's other jobs:

1. Click **. This will display the Job List window.

HRS Screen Menu

ID **AZ6185329** NAME **ABBOTT, GLEN B.** Status **Active**

JOB CLASS **SDC TEACHER SPECIAL ED** job # **7** 7 Type **Certificated**
prime current

Employee Info.		Job Assignment		Benefits & Dependents	
03	Personnel Info	06	Labor Distribution	20	Standard Benefits
12	Contact Data	05	Salary/Pay Rate	21	Additional Benefits
13	Confidential Info	04	Job Assignment	22	Dependents
14	Misc. Data	**	Job Assignment List	24	Dependent Verify

Other Information			
10	Credential Info	23	Voluntary Deduction
17	Skills & Language	11	HRS Seniority
18	License & Honors	30	Payroll Tax Status

Tables

OK Help

2. Select a job from the list.
3. Click **Select Job**. The selected job will appear in the HRS Screen Menu window.

99 - Job List

ID **AZ6185329** Name **ABBOTT, GLEN B.**

Prime Job **7**

Job #	Job Status	Position	Job Class & Title
1	T	127002 082400	SS TEACHER
2	A	192001 080030	PERIOD SUBSTITUTE
3	T	197201 082500	SS OTHER HOURLY ASSIGN
4	A	124001 080300	CERT CO-CURRICULAR
5	T	123005 080110	CERT WORKSHOP
6	T	127103 082500	SS OTHER HOURLY ASSIGN
8	T	177054 082500	SS OTHER HOURLY ASSIGN

Highlight a job then push ok or just cancel

Select Job OK Print

Employee Information

Screen 03 - Personnel Information

03 - Personnel Information

ID: AZ6185329 Name: ABBOTT, GLEN B.
Pfx: Sfx:

Primary Job	Employee Type	Permanency Indicator	1st Work Date
7	C	T	09/01/2003

Pay Location	Original Hire Date	1st Prob. Service	Seniority Date
002 - EDUCATION CENTER	09/01/2003	00/00/0000	09/01/2003

Informational Data

Last Actions: 17 22 21 Last Action Date: 08/05/2013
Minimum Record: Pension Reform - New PERS: *
Employment Status: A Status Date: 08/25/2004
Termination Reason: C0 -

OK Print

Screen 12 - Contact Data

12 Contact Data

ID: AZ6185329 Name: ABBOTT, GLEN B.

Address: 9300 IMPERIAL HIGHWAY,
City: DOWNEY,
State: CA
Zip: 90242
Phone: -

Directory Indicator: A Collective Bargaining Directory Indicator: N

Emergency Contact:
Relationship:
Emergency Phone: -

Current SSN: 623-98-5995 Current EID: AZ6185329
Prior SSN: 271-96-XXXX Prior EID:

Prior Names 1. 2. 3.

OK Print

Screen 13 - Confidential Information

13 Confidential Information		
ID : AZ6185329 Name ABBOTT,GLEN B.		
Sex F Handicap <input type="checkbox"/>	Ethnicity	
DOB 01/01/1950 Age 64		
Citizenship/Visa <input type="checkbox"/>	<input type="checkbox"/> Amer Indian <input type="checkbox"/> Japanese <input type="checkbox"/> Asian Indian <input type="checkbox"/> Korean <input type="checkbox"/> African Amer <input type="checkbox"/> Laotian <input type="checkbox"/> Cambodian <input type="checkbox"/> Other Asian <input type="checkbox"/> Chinese <input type="checkbox"/> Other Pac <input type="checkbox"/> Filipino <input type="checkbox"/> Islander <input type="checkbox"/> Guamanian <input type="checkbox"/> Samoan <input type="checkbox"/> Hawaiian <input type="checkbox"/> Tahitian <input checked="" type="checkbox"/> Hispanic <input type="checkbox"/> Vietnamese <input type="checkbox"/> Hmong <input type="checkbox"/> White	
Country <input type="checkbox"/>		
Visa Exp Date 00/00/0000		
Military Status <input type="checkbox"/>		
Perm/Temp P Full/Part P		
Appt Term <input type="checkbox"/> Fund Source <input type="checkbox"/>		
<input type="button" value="OK"/> <input type="button" value="Print"/>		

Screen 14 - Miscellaneous Data

14 - Miscellaneous Data	
ID AZ6185329 Name ABBOTT,GLEN B.	
TB Date 09/2014 mm/yyyy	Physical Exam Date 00/00/0000
Driver's License # <input type="text"/>	Education Level Year <input type="text"/>
License Expire Date 00/00/0000	Educational Level 00
Class <input type="text"/>	
District Code 1. <input type="text"/>	District Dates 00/00/0000
2. <input type="text"/>	00/00/0000
3. <input type="text"/>	
4. <input type="text"/>	
5. <input type="text"/>	
6. <input type="text"/>	
<input type="button" value="OK"/> <input type="button" value="Print"/>	

Job Assignment Information

Screen 06 - Labor Distribution

06 - Labor Distribution

ID: AZ6185329 Name: ABBOTT,GLEN B.

Job	Position	Job Class
1	127002	082400 - SS TEACHER

Salary Rate: 41.570 Annual Salary: 17,459.400
 Full-Time Rate: 41.570

Fund Resource	Goal	Funct	Obj	Loc	Percent
01.0-65000.0	57700	11100	1130	4028033	100.000

Buttons: OK, Print

Screen 05 - Salary/Pay Rate

05 - Salary/Pay Rate

ID: AZ6185329 Name: ABBOTT,GLEN B.

Job	Position	Job Class	Pay Cycle	Pay Months
1	127002	082400 - SS TEACHER	V1	12

ILL Plan	Vac Plan	Time Rpt Loc	Time Rpt Code	Pay Basis	Earning Types
NA	NA	002	P	H	REG

Sched/Range/Step	Effective Date	% Full Time	Calc Meth	Full Time Rate	Salary Rate
H 001 06	06/03/2011	100.00		41.570	41.570

Stipends: 1, 2, 3, 4, 5

Dated	1	2	3	4
1				
2				

Retire Rate	O/Ride	Work Days	Work Cal	Wrk Hrs/Day	Sess Type
45,394.44		70.0	S	6.00	V

Retirement:

Plan	Status	Spl	Effective Date	PERS Case Sts	STRS Cls Cd	STRS Base Hrs
S5	M		09/01/2003			0.00

Buttons: OK, Print

Screen 04 - Job Assignment

04 - Job Assignment

ID AZ6185329 Name ABBOTT,GLEN B.

Job	Position	Board Approval	Credential	Cred Exp Date	Academic Rank
1	127002	06/01/2011	TC35L	02/01/2013	

Job Class	Type	Status	Status Date	Permanency	Job Family	Class Entry
082400	C	T	08/28/2011	Q		00/00/0000

Work Location: 02000 - ROSEMONT HIGH SCHOOL
 Work Phone: () -
 Ext:

Anniversary Date	Pass Prob Date	Eval	Eval Due	Barg Unit	Unit Mem	Mileage
99/99/9999	00/00/0000		00/00/0000	DE	Y	

Leave Reason: - Begin: 00/00/0000 End: 00/00/0000
 Term Reason: C0 - Term Date: 08/28/2011 Rehire Elig:

OK Print

Benefits and Dependents Information

Screen 20 - Standard Benefits

20 - Standard Benefits

ID AZ6185329 Name ABBOTT,GLEN B.

Primary Job 7 Job Class Title SDC TEACHER SPECIAL ED Emp Stat A

Benefit Elig F Date of Birth 01/01/1950 First Prob Service 00/00/0000

Full/Part Time P Dependents 00 Bargaining Unit DE Cafe Max 0.00

	Plan-Coverage	Description	Deduction		Contribution		Effective	End	Pend Flag
			GTN	Amount	GTN	Amount			
Medical	VKA-03	VEBK AIS	187	160.17	189	1205.48	///	///	
							Payroll	///	///
Dental	DPP-03	DLTAPPO	204		203	183.87	///	///	
							Payroll	///	///
Vision	VSP-01	VISION	160		161	27.04	///	///	
							Payroll	///	///
Life 1	BLC-01	BLCRLIF	000		134	2.40	///	///	
							Payroll	///	///
Life 2							///	///	
							Payroll	///	///
Dep Life							///	///	
							Payroll	///	///
Inc Prop							///	///	
							Payroll	///	///

OK Print

Screen 21 - Additional Benefits

21 - Additional Benefits

ID AZ6185329 Name ABBOTT,GLEN B.

Primary Job 7 Job Class Title SDC TEACHER SPECIAL ED Emp Stat A

Benefit Elig Date of Birth 01/01/1950 First Prob Service 00/00/0000

Full/Part Time P Dependents 00 Bargaining Unit DE Cafe Max 0.00

Plan-Coverage	Description	Deduction GTN	Amount	Contribution GTN	Amount	Effective	End	Pend Flag	
222-01	222	222	97.00	000		//	//	<input type="checkbox"/>	
						Payroll	//	//	<input type="checkbox"/>
						Payroll	//	//	<input type="checkbox"/>
						Payroll	//	//	<input type="checkbox"/>
						Payroll	//	//	<input type="checkbox"/>
						Payroll	//	//	<input type="checkbox"/>
						Payroll	//	//	<input type="checkbox"/>
						Payroll	//	//	<input type="checkbox"/>
						Payroll	//	//	<input type="checkbox"/>

OK Print

Screen 22 - Dependents

22 - Dependents

ID AZ6185329 Name ABBOTT,GLEN B. Employee Stat A

SSN	Name	Birthdate	Rel	Stu	1	2	Plan Codes								
							3	4	5	6	7				
-		//													
-		//													
-		//													
-		//													
-		//													
-		//													
-		//													
-		//													
-		//													
-		//													
-		//													

OK Print

Screen 24 - Dependent Verification

24 - Dependent Verification

ID AZ6185329 Name ABBOTT, GLEN B. Employee Stat A

SSN	Name	Insurance Date	Review Status	Review Date
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//
- -		//	<input type="checkbox"/>	//

OK Print

Other Information

Screen 10 - Credential Information

10 - Credential Information

SSN xxx-xx-2358 Name AMES, CYNTHIA Emp Status A

Other Credentials RP681 20090301

SEID Type RP - RYAN PROFESSIONAL CLEAR CREDENTIAL
 Doc ID Title 681 - MS CROSSCULTURAL, LANGUAGE & ACAD DEV EM

Cbest Date 02/2000 Regis No 00610 Regis Date 07/09/2004

Cred RP681 Issue Date 02/09/2004 Expire Date 03/01/2009 Renew R21

Maj/Min/Subj:	-		-	
	-		-	
	-		-	
	-		-	

Limitations:

OK Print

Explore Job Assignments

Explore Job Assignments provides drop-down lists to filter employee data and customize the display format. Up to four columns of data can be displayed for each record. Explore Job Assignments, Explore Benefits, Explore Credentials, Explore Deductions, Explore Assignment Distributions, and Explore Position Control windows have different field data, but the functionality is the same.

Explore Job Assignments Default Display

The screenshot shows the 'Explore Job Assignments' window with the following elements:

- Filters:** Status, Job Stat, Type, Work Location, Job Class, Prime Jobs Only (checked), Schedule, Range, Step, Pay Basis, Pay Cycle, Work Calendar, Barg Unit, Perm Ind, Selection Criteria, SSN-4, Pay Location.
- Buttons:** Close, Print, Export, Go.
- Columns:** Column 1: AGE IN YEARS; Column 2: JOB CLASS TITLE; Column 3: YEARS SERVED; Column 4: WORK DAYS.
- Summary:** 1294 Records, Sort By: NAME Last Fir, Sum By: Calc, \$272,403.00.

Data Filters

Drop-down lists used to limit search results.

- Choose a value from a drop-down list to restrict search results
- Blank out the field value to remove the restriction
- Uncheck the **Prime Jobs Only** box to include secondary jobs in the results
- Click **Go** to initiate the search

Selection Criteria

One or more defined conditions used to filter data. Selection Criteria is generally used to filter data when the desired field is not available on the explore window or when data is filtered by multiple values within the same field, e.g., filtering annual salary data for three classified bargaining units. Refer to *Section 6 – Report Components* on pages VI-4 through VI-9 for creating and editing selection criteria from the menu.

- Choose a Selection Criteria from the drop-down list to restrict search results. Please note that Selection Criteria cannot be used in conjunction with other data filters, including the **Prime Jobs Only** filter.
- Blank out the field value to remove the restriction
- Click **Go** to initiate the search

The image shows a close-up of a dropdown menu labeled 'Selection Criteria' with the selected option 'CLASSIFIED ANNUAL SALARY'.

Change Columns in the List

Customize the display format by selecting other fields from the drop-down lists at the top of each column. Changes to the column fields are temporary.

AGE IN YEARS	JOB CLASS TITLE	YEARS SERVED	WORK DAYS
33	LEAD CUSTODIAN, NIGHT	10	261.00
57	E/TCHR	34	184.00
49	SR ACCOUNTING ASST	12	261.00
36	SECONDARY TEACHER	05	184.00
45	SECRETARY BILINGAL	09	238.00
24	E/TCHR-MUSIC	00	185.00
27	E/TCHR	02	184.00
26	E/TCHR	00	185.00
39	SR ACCOUNTING ASST	06	261.00
32	SECONDARY TEACHER	07	184.00
43	SECONDARY TEACHER	00	185.00
51	E/TCHR	29	184.00
53	E/TCHR	15	184.00

1094 Records Sort By **NAME Last Fi** + Sum By Calc \$ 225,609.00

To change the column display:

1. Select field names from the column header drop-down lists in the order they are to be displayed.

Column 1	Column 2	Column 3	Column 4
NAME Last First	JOB CLASS TITLE	WORK LOC.TITLE	SALARY RATE

2. Click **Go**. The list in the selected format will be displayed in the Print Preview window. Numeric values in the last column are automatically totaled and the record count is also shown.

SAMPLE SCHOOL DISTRICT 12/02/15
 FILTERS USED 15:48:25
 EMPLOYEE STATUS = A PAGE: 1
 PRIME JOB = YES

SORTED BY
 NAME Last First, ascending

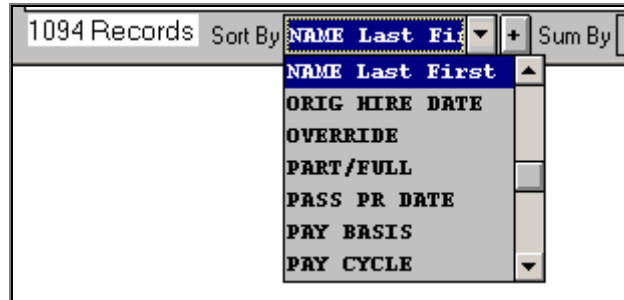
NAME	JOB TITLE	WRK LOC NM	SAL RATE
ABBOTT, GLEN B.	SDC TEACHER SPECIAL ED	ROSEMONT HIGH SCHOOL	6,992.50
ABBOTT, MARTHA B.	ADULT ED HOURLY	HARDY ADULT CENTER	34.09
ABBOTT, MONICA B.	SDC TEACHER SPECIAL ED	ROSEMONT HIGH SCHOOL	7,694.10
ABBOTT, SUSAN B.	ADULT ED HOURLY	HARDY ADULT CENTER	34.09
ABRAMS, CHRISTINE B.	TEACHER	SOUTH IMPERIAL HIGH SC	7,979.00



Build a custom report from the Report Builder window to create a permanent format for displaying balance information or if more than four data fields are needed.

Sort Records

Sort By groups records in ascending or descending order using the field selected.



To sort records:

1. Select the field to sort by from the *Sort By* drop-down list.
2. Click the sort direction button to reverse the sort order if necessary.
 - Plus (+) - ascending (sort from lowest to highest value)
 - Minus (-) - descending (sort from highest to lowest value)
3. Click **Go**.

To remove sorting:

1. Select the blank value in the *Sort By* drop-down list.
2. Click **Go**.

Subtotal Records

Sum By groups related records together and displays the total, average, count, maximum, or minimum values of the amounts in the group. **Column 1** will automatically reflect the Sum By field selected. The output reflects one subtotal row for each distinct field value selected.

To subtotal records:

1. Select the subtotal field from the *Sum By* drop-down list. It is best to select the same account or account segment field selected in the *Sort By* drop-down list. The field selected is automatically reflected in **Column 1**, and **Column 2** is left blank.
2. Select the calculate option from the *Calculate* drop-down list.

Field	Description
Sum	Totals the amounts in the group
Max or Min	Displays the largest or smallest value in the group
Count	Displays the number of records for the group
Avg	Calculates the average for the group

3. Click **Go**. Print Preview displays the list. Filters used and sorting order, if any, will be displayed in the upper left corner of the report.

SAMPLE SCHOOL DISTRICT		12/02/15
		15:53:58
FILTERS USED		PAGE: 1
EMPLOYEE STATUS = A		
PRIME JOB = YES		
SORTED BY	SUMMARIZED BY	CALCULATION
NAME Last First, ascending	NAME Last First	SUM
NAME	NULL	NULL
-----	-----	SAL_RATE
ABBOTT, GLEN B.		6,992.50
ABBOTT, MARTHA B.		34.09
ABBOTT, MONICA B.		7,694.10
ABBOTT, SUSAN B.		34.09

To remove subtotals:

1. Select the blank value in the *Sum By* drop-down list.
2. Click **Go**.

Generate Lists

Explore search results can be viewed online, printed, or used to create export files. PC LLL will display a multi-page list displaying the filters used, the sorting criteria, and up to four columns of data.

View List

To view a list:

1. Click **Go**. The list will display in the Print Preview window for online viewing.
2. Click the *printer* icon on the Print Preview toolbar to produce a hard copy of the report. The report will print directly to the default printer.

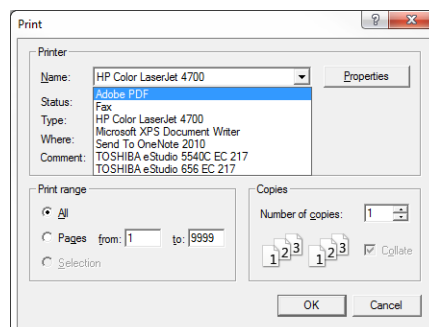


3. Press **ESC** on the keyboard or click the **X** in the upper right corner to return to the explore window.

Print List from Explore Window

To print a list:

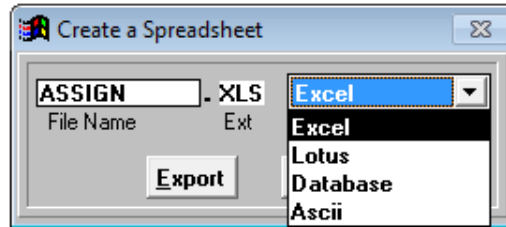
1. Click **Go** to display the list if **Print** is grayed out on the explore window
2. Press **Esc** or click the **X** in the upper right corner to return to the explore window.
3. Make desired print selections, e.g., change printer, print range, or print properties.
4. Click **OK** to print.



Export Lists from Explore Window

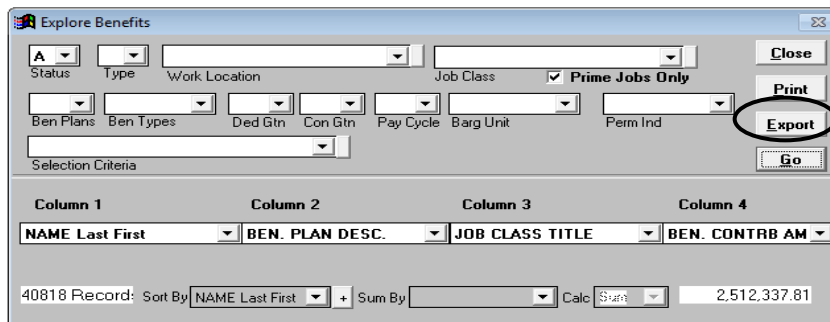
Lists from explore windows can be exported in the following file formats:

- Excel
- Lotus
- Database (DBF) - use when spreadsheet file exceeds 16,383 lines
- ASCII (text)

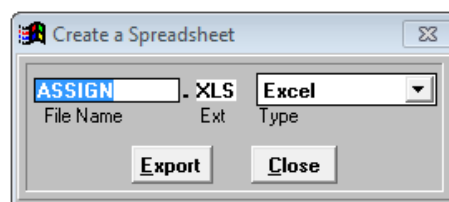


To export a list:

1. Click **Go** to display the list if **Export** is grayed out on the explore window.
2. Press **Esc** or click the **X** in the upper right corner to return to the explore window.
3. Click **Export**.



4. The Create a Spreadsheet window will appear.
5. Enter the *File Name* and *Type* from drop-down list. The file extension will change accordingly.
6. Click **Export** to generate the file. The Excel export file will automatically open and save to **C:\pcprods\REPORTS** or the designated path.



Select Database (DBF) as the report output type for spreadsheets exceeding 16,383 lines. Refer to the **Appendix** on Page A-19 for instructions on opening DBF file(s) with Excel.

Explore Benefits

The Explore Benefits window provides drop-down lists to filter employee benefit contribution data and customize the display format. Up to four columns of data can be displayed for each employee record. This explore window has the same functionality as Explore Job Assignments. Please refer to instructions on pages IV-16 through IV-19 for filtering, sorting, and subtotaling records.

Explore Benefits Default Display

The screenshot shows the 'Explore Benefits' window with the following elements:

- Filters:** Status, Type, Work Location, Job Class, Prime Jobs Only, Ben Plans, Ben Types, Ded Gtn, Con Gtn, Pay Cycle, Barg Unit, Perm Ind.
- Selection Criteria:** A text input field.
- Table Headers:**

Column 1	Column 2	Column 3	Column 4
NAME Last First	BEN. PLAN DESC.	JOB CLASS TITLE	BEN. CONTRB AM
- Summary:** 0 Records, Sort By: NAME Last First, Sum By: [blank], Calc: Sum, 0.00

Explore Benefits Data

To explore employer benefit contributions:

1. Select **Explore I Benefits** from the menu.
2. Use filters or selection criteria as appropriate.
3. Click **Go**. The list will be displayed in the Print Preview window for online viewing.
4. Click the *printer* icon in the Print Preview toolbar to produce a hard copy of the report. The report will print directly to the default printer. Print from the Explore Benefits window for additional printing options.



5. Press **ESC** on the keyboard or click the **X** in the upper right corner to return to the explore window.

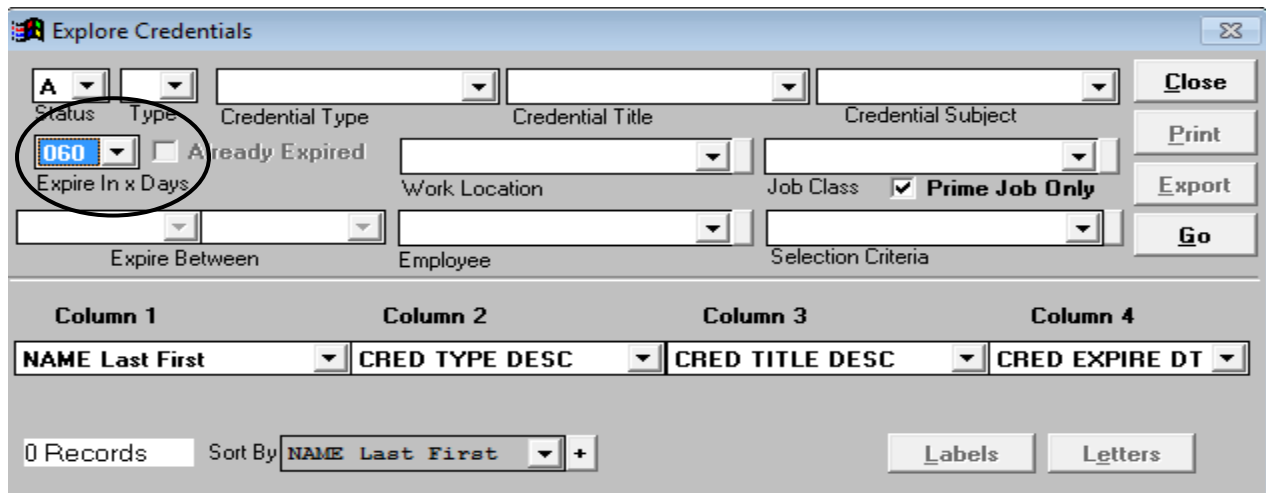


Print from the Explore Benefits window to utilize additional print options. Data can also be exported from the window.

Explore Credentials

Explore Credential provides customized drop-down lists for filtering credential information. This explore window is similar to the Explore Job Assignments window, but it does not have a *Sum By* option and includes options for creating mailing labels and letters to notify employees before their credentials expire. Please refer to instructions on pages IV-16 through IV-19 for filtering, sorting, and subtotaling records. Instructions for creating labels are on the next page.

Explore Credentials Default Display



The screenshot shows the 'Explore Credentials' window with the following elements:

- Buttons: Close, Print, Export, Go
- Filters: Status (A), Type, Credential Type, Credential Title, Credential Subject, Expire In x Days (060), Already Expired, Work Location, Job Class (Prime Job Only), Expire Between, Employee, Selection Criteria
- Table Headers: Column 1 (NAME Last First), Column 2 (CRED TYPE DESC), Column 3 (CRED TITLE DESC), Column 4 (CRED EXPIRE DT)
- Summary: 0 Records, Sort By (NAME Last First)
- Buttons: Labels, Letters

Explore Credentials Data

To explore credentials:

1. Select **Explore I Credentials** from the menu.
2. Use filters or selection criteria as appropriate.
3. Click **Go**. The list will be displayed in the Print Preview window for online viewing. Click the *printer* icon in the Print Preview toolbar to produce a hard copy of the report. The report will print directly to the default printer. Print from the Explore Credentials window for additional printing options.



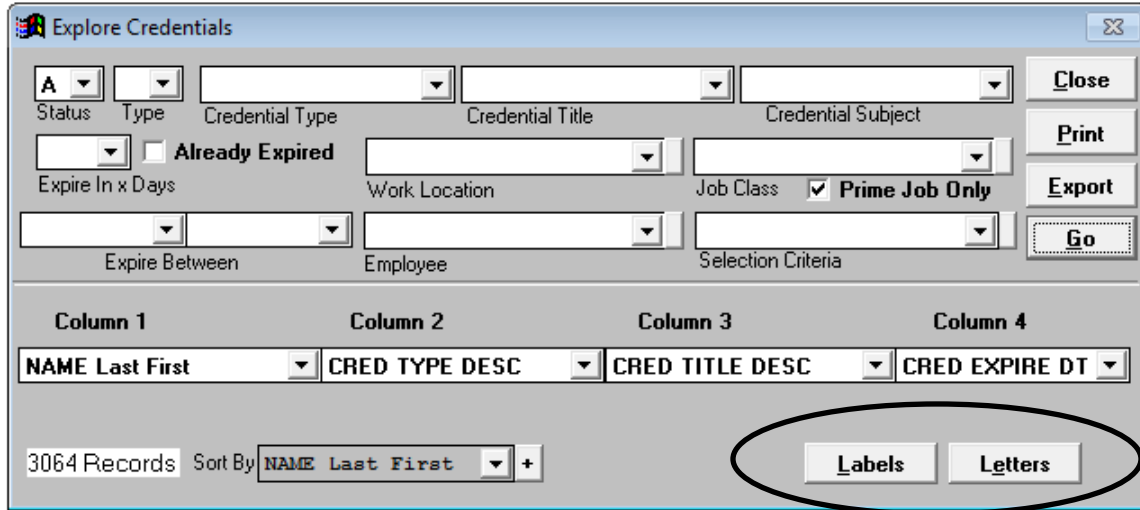
4. Press **ESC** on the keyboard or click the **X** in the upper right corner to return to the explore window.



Print from the Explore Credentials window to utilize additional print options. Data can also be exported from the window.

Explore Credentials - Labels & Letters

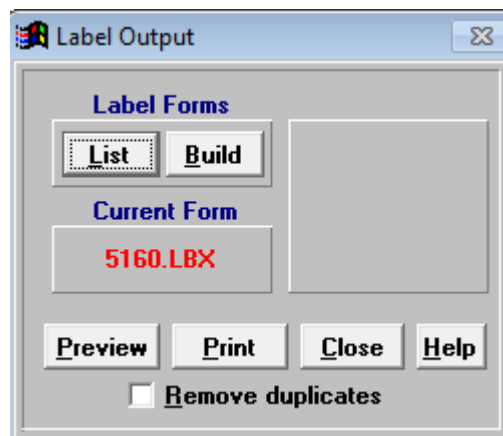
Explore Credentials includes options for creating address labels and notification letters for employees listed on the credentials expiration list.



Create Labels

To create address labels:

1. Click **Labels**.
2. Click **List**.
3. Click **Current Form** to select label type.
4. Check **Remove Duplicates** box if jobs other than the prime job are included. Be sure to read the warning message that appears when this option is selected.
5. Click **Print**.

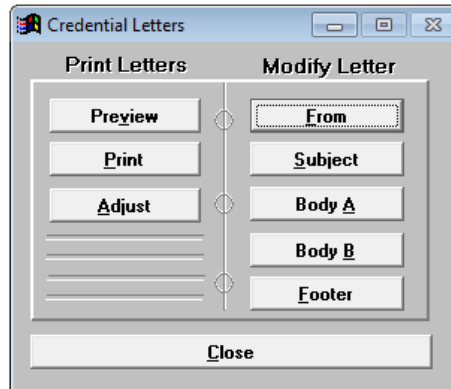


6. Click **Close** to return to the Explore Credentials window.

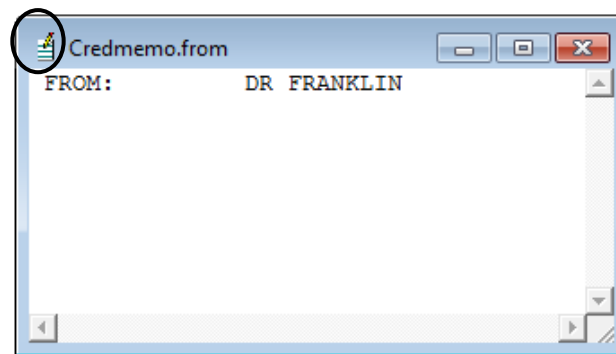
Create Letters

To create letters:

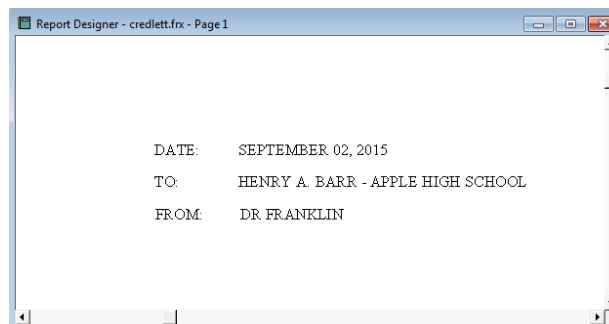
1. Click **From** to set up the letter text.



2. A window will appear. Type the text to appear in the *From* section of the letter. **Dr. Franklin** is typed for this illustration.
3. Click the page notepad and pencil in upper left corner.
4. Select **Close** from the drop-down menu to return the Credentials Letters window.



5. Click **Preview** to view changes to the letter.



6. Click **Subject**, **Body A**, **Body B**, or **Footer** as appropriate to make changes to these sections of the letter as appropriate and repeat steps 2 – 5.
7. Click **Close** to return to the Explore Credentials window.

Explore Deductions

The Explore Deductions window provides drop-down lists to filter employee deductions/reductions data and customize the display format. Specialized filters like GTN and GTN Description are provided to make finding desired deduction records easier. Up to four columns of data can be displayed for each employee record. This explore window has the same functionality as Explore Job Assignments. Please refer to instructions on pages IV-16 through IV-19 for filtering, sorting, and subtotalling records.

Explore Deductions Default Display

The screenshot shows the 'Explore Deductions' window with the following elements:

- Filters:** Status, Type, Work Location, Job Class (with Prime Jobs Only), GTN, GTN Description, Vendor, Pay Cycle, Barg Unit, Perm Ind, and Selection Criteria.
- Column Headers:** Column 1: NAME Last First; Column 2: DED. GTN DESC; Column 3: JOB CLASS TITLE; Column 4: DED. DEDUCT AM.
- Summary:** 0 Records, Sort By: NAME Last Fi, Sum By: (blank), Calc: Sum, 0.00.
- Buttons:** Close, Print, Export, Go.

Explore Deductions Data

To explore employee deductions/reductions:

1. Select **Explore I Deductions** from the menu.
2. Use filters or selection criteria as appropriate.
3. Click **Go**. The list will be displayed in the Print Preview window for online viewing.
4. Click the *printer* icon in the Print Preview toolbar to produce a hard copy of the report. The report will print directly to the default printer. Print from the Explore Deductions window for additional printing options.



5. Press **ESC** on the keyboard or click the **X** in the upper right corner to return to the explore window.



Print from the Explore Deductions window to utilize additional print options. Data can also be exported from the window.

Explore Assignment Distributions

The Explore Assignment Distributions window provides drop-down lists to filter data and customize the display format. Use this window to explore accounting data. Up to four columns of data can be displayed for each employee record. This explore window has the same functionality as Explore Job Assignments. Please refer to instructions on pages IV-16 through IV-19 for filtering, sorting, and subtotalling records.

Assignment Distributions Default Display

The screenshot shows the 'Assignment Distributions' window with the following elements:

- Filters: Status, Job Stat, Work Location, Job Class, and a checked 'Prime Job Only' checkbox.
- SACS filters: Fund, SFund, Resource, FY, Goal, Function, Object, Location, Loc-3, and Loc-4.
- Buttons: Close, Print, Export, and Go.
- Selection Criteria: A text input field.
- Column Headers: Column 1 (NAME Last First), Column 2 (SACS ACCT1), Column 3 (SACS ACCT2), and Column 4 (SALARY RATE).
- Summary: 0 Records, Sort By (NAME Last Fir), Sum By, Calc, and a value of 0.00.

Explore Assignment Distributions Data

To explore assignment distributions:

1. Select **Explore | Assignment Distributions** from the menu.
2. Use filters or selection criteria as appropriate.
3. Click **Go**. The list will be displayed in the Print Preview window for online viewing.
4. Click the *printer* icon in the Print Preview toolbar to produce a hard copy of the report. The report will print directly to the default printer. Print from the Assignment Distributions window for additional printing options.



5. Press **ESC** on the keyboard or click the **X** in the upper right corner to return to the explore window.



Print from the Assignment Distributions window to utilize additional print options. Data can also be exported from the window.

Explore Position Control

Explore Position Control provides drop-down lists to filter position control data and customize the display format. This data is from the optional HRS Position Control Data Base which is not used by all districts. Up to four columns of data can be displayed for each employee record. This explore window has functionality similar to Explore Job Assignments, but it does not have a *Sum By* option. Please refer to instructions on pages IV-16 through IV-19 for filtering, sorting, and subtotaling records.

Explore Position Control Default Display

The screenshot shows the 'Explore Position Control' window. It features several filter sections with drop-down menus: 'Position: From To Status Job Class', 'Cnt Meth Barg Unit Schedule Range Step Work Location', and 'Fund Resource Goal Function Object Location'. On the right side, there are buttons for 'Close', 'Print', 'Export', and 'Go'. Below the filters, there are five columns for data display: 'Column 1' (PC POSITION #), 'Column 2' (PC JOB TITLE), 'Column 3' (PC CNTRL I), 'Column 4' (PC DOLLAR AM), and 'Column 5' (PC FTE). At the bottom, it shows '0 Records Found' and 'Sort By PC POSITION #' with a '+' sign and numerical values '0.00' and '0.00'.

Explore Position Control

To explore position control:

1. Select **Explore I Position Control** from the menu.
2. Use filters or selection criteria as appropriate.
3. Click **Go**. The list will be displayed in the Print Preview window for online viewing.
4. Click the *printer* icon in the Print Preview toolbar to produce a hard copy of the report. The report will print directly to the default printer. Print from the Explore Position Control window for additional printing options.



5. Press **ESC** on the keyboard or click the **X** in the upper right corner to return to the explore window.



Print from the Explore Position Control window to utilize additional print options. Data can also be exported from the window.

Explore Table Data

Other Table Data provides access to codes and related descriptions for selected HRS tables. These codes identify available values that can be reflected on employee records in PC LLL.

From the Other Table Data window users can:

- View descriptions for job class, work location, salary schedule, pay location, termination, permanency, bargaining unit, credential title, credential type, subject ,and leave reason
- Print the codes and descriptions
- Export the codes and their descriptions to a spreadsheet or database file

Explore Table Data

To explore codes and their descriptions:

1. Select **Explore | Tables** from the menu.
2. Click the button for the desired table.
3. Click the radio button to sort data by code or description. The default sort order is by code.
4. Scroll through the list to view the desired code or description.
5. Repeat steps 2 – 4 to view other table data.

Code	Description
000100	SUPERINTENDENT
000200	DEPUTY SUPERINTENDENT
002000	BOARD OF EDUCATION
003000	PERSONNEL COMMISSIONER
012000	ASST SUPT EDUC PROG
013000	CHIEF ACADEMIC OFFICER
016000	ASST SUPT EDUC SVCS
017000	CONSULTANT III



Additional table data is included in the Job Class export file.

Print Table Data

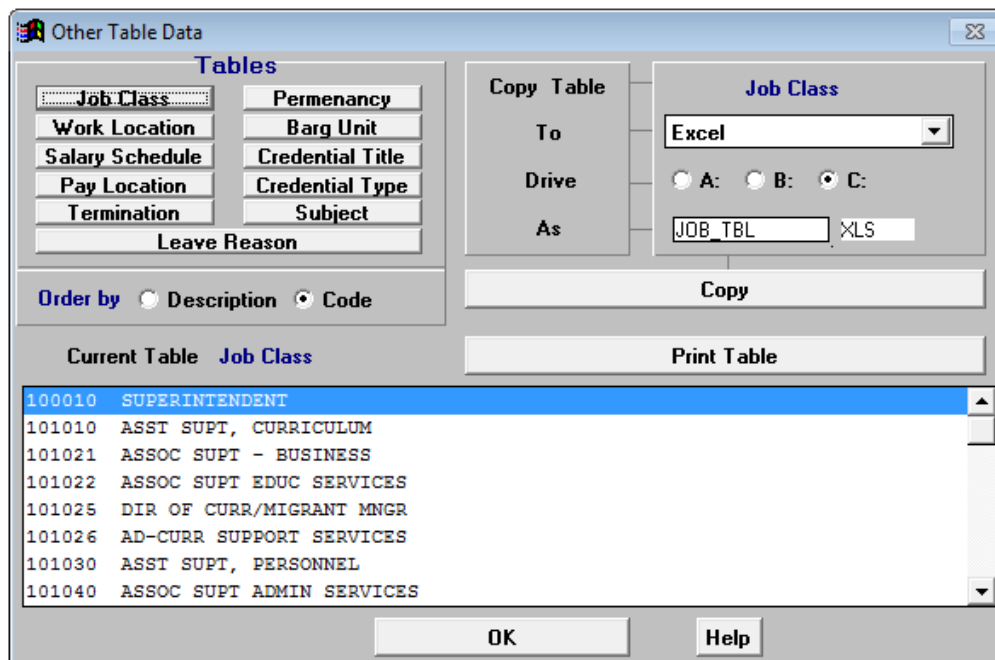
To print a list of control table codes and descriptions:

1. Select **Explore | Tables** from the menu.
2. Click the button for the desired table.
3. Click **Print Table**.

Export Table Data

To export a list of control table codes and descriptions:

1. Select **Explore | Tables** from the menu.
2. Click the button for the desired table. The export file name is automatically populated. The default name can be overwritten.
3. Select file type from the drop-down list in the top right corner. The file extension is automatically populated. The default name can be overwritten.
4. Click **Copy**. The export file will be saved to the designated path.
5. Click **OK** to exit the window.



Audit Employee Database

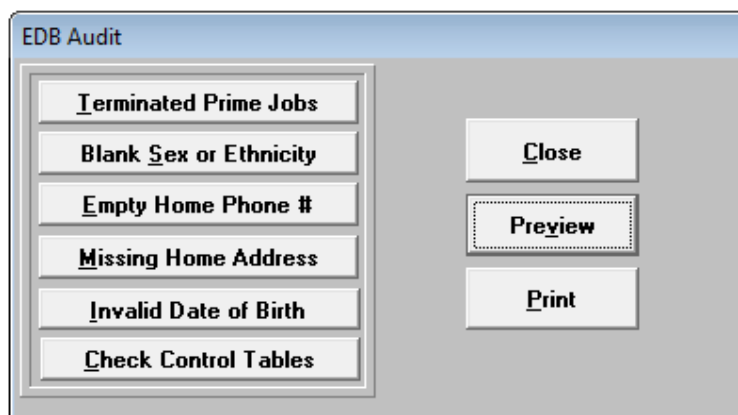
The EDB Audit window generates lists that identify missing or incorrect data in the HRS Employee Database.

There are six EDB Audit options:

EDB Audit	Description
Terminated Prime Jobs	Identifies employees that have a prime job with a terminated status
Blank Sex or Ethnicity	Identifies employees with no data in either the Sex or Ethnicity fields
Empty Home Phone #	Identifies employees that do not have a home phone number entered in the database
Missing Home Address	Identifies employees that do not have a home address entered in the database
Invalid Date of Birth	Helps identify errors in the Date of Birth field
Check Control Tables	Identifies control codes that appear in the EDB but are not found in the HRS Control Database

To run an EDB audit:

1. Select **Explore | EDB Audit** from the menu.
2. Click the desired audit button. An EDB audit window displaying a list of records with errors will appear. If the list is empty, no errors were identified.
3. Press **ESC** to exit list.
4. Click **Preview** to view list in the Print Preview window.
5. Click **Print** to produce a hard copy of the list.



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Section 5

Fixed Reports

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Fixed Reports

The following fixed reports are available in **PC LLL**. Additional reports are added as the need arises.

Fixed Report	Description
Salary Scatter Gram	Salary column/range and step analysis by schedule
Phone Directory	Employee phone directory with various format and selections options
Affirmative Action	Employee statistics with various selection options
Longevity	Employees sorted by selected criteria for longevity reporting
TB Expiration	Employees by name, job class and location list by TB expiration dates. Report may be used to generate mail merge and labels output.
Employee Cleanup	Form that displays current employee and dependent information and corresponding blank fields that can be used to update the information. Report includes option to create checklist to track forms.
Statement of Benefits	Employee benefit form with option to include dependent information and export data
Salary Projection	Annual salary and employee benefit projections based on EB rates entered by user
Third Party TSA Extract	403(b) or 457 data in the Excel format that can be used to monitor contributions. Calendar year-to-date employee deductions and employer contributions are included for PC Labor subscribers.
Quick Lists	Credentials, benefits summary, stipends, and vacant positions data in the Excel format with various display options
BEST – Position Control	Various assignment and position reports to assist districts with the update of their Position Control data

Salary Scatter Gram Report

The **Salary Scatter Gram Report** provides the number of FTE and employees on each column/range of a selected salary schedule. This report is often used to help complete Form J-90.

To view or print this report:

1. Select **Reports | Fixed Reports | Salary Scatter Gram**.
2. Enter a salary schedule, up to 3 job status values, and the applicable pay basis for the schedule. Completion of the location, work location, or pay location field is optional.
3. The report default is prime job only. Check other option boxes as appropriate.
4. Type the title to print at the top of the report in the Scatter Gram Report Title field if desired.
5. Click **Run**.
6. Click **Preview** to view online report or click **Print** to produce a hard copy of the report before viewing it.

Salary Schedule Scatter Gram

Schedule: ABCDEFHKLOPQSTVXZ
 Status: AFLPRT
 Pay Basis: DHLM
 Fund: 01 03 11 12 13 21 29 30 99
 Location: Enter a valid Account location
 Work Loc: Enter a valid Work Location
 Pay Loc: Enter a valid Pay Location

Prime Job Only Include Paid Leave Assignments Restricted Unrestricted

Scatter Gram Report Title

Column Names			
1	2	3	4
Column 1	Column 2	Column 3	Column 4
# of Fte	# of Fte	# of Fte	# of Fte
Employee Cnt	Employee Cnt	Employee Cnt	Employee Cnt
5	6	7	8
Column 5	Column 6	Column 7	Column 8
# of Fte	# of Fte	# of Fte	# of Fte
Employee Cnt	Employee Cnt	Employee Cnt	Employee Cnt

Last Run

Date:
 Time:
 Matches:

Sample Salary Scatter Gram Format Report:

SAMPLE SCHOOL DISTRICT									Date Ran 12/02/15	
SALARY SCHEDULE A SCATTER GRAM									Time Ran 16:02:54	
									Data as of 09/23/14	
	Column 1 # of Fte Employee Cnt	Column 2 # of Fte Employee Cnt	Column 3 # of Fte Employee Cnt	Column 4 # of Fte Employee Cnt	Column 5 # of Fte Employee Cnt	Column 6 # of Fte Employee Cnt	Column 7 # of Fte Employee Cnt	Column 8 # of Fte Employee Cnt	Row Totals	Average
01	8,487.00	8,689.00	8,891.00	9,092.00	9,294.00	9,479.00	0.00	0.00	-----	
	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	
	1	0	0	0	0	0	0	0	1	
	8,487.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8,487.00	8,487.00
02	8,623.00	8,825.00	9,027.00	9,230.00	9,432.00	9,621.00	0.00	0.00	-----	
	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	
	0	1	0	0	0	0	0	0	1	
	0.00	8,825.00	0.00	0.00	0.00	0.00	0.00	0.00	8,825.00	8,825.00
03	8,759.00	8,962.00	9,163.00	9,365.00	9,568.00	9,759.00	0.00	0.00	-----	
	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	
	0	1	0	0	0	0	0	0	1	
	0.00	8,962.00	0.00	0.00	0.00	0.00	0.00	0.00	8,962.00	8,962.00
04	8,896.00	9,098.00	9,300.00	9,502.00	9,705.00	9,899.00	0.00	0.00	-----	
	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00	
	0	0	0	1	0	0	0	0	1	
	0.00	0.00	0.00	9,502.00	0.00	0.00	0.00	0.00	9,502.00	9,502.00
05	9,073.00	9,280.00	9,486.00	9,684.00	9,899.00	10,097.00	0.00	0.00	-----	
	0.00	3.00	4.00	0.00	5.00	0.00	0.00	0.00	12.00	
	0	3	4	0	5	0	0	0	12	
	0.00	27,840.00	37,944.00	0.00	49,495.00	0.00	0.00	0.00	115,279.00	9,606.58

Totals										
	1.00	5.00	4.00	1.00	5.00	0.00	0.00	0.00	16.0000	
	1	5	4	1	5	0	0	0	16	
	8,487.00	45,627.00	37,944.00	9,502.00	49,495.00	0.00	0.00	0.00	151,055.00	9,440.93
	8,487.00	9,125.40	9,486.00	9,502.00	9,899.00	0.00	0.00	0.00		

Phone Directory Report

The **Phone Directory Report** provides home and work contact information for employees.

To view or print this report:

1. Select **Reports | Fixed Reports | Phone Directory**.
2. Select an existing **Selection Criteria** and **Grouping Definition** or create new ones.
3. Choose an output format (one column, two, column, or single line).
4. Click **Run**.
5. Click **Preview** to view online report or click **Print** to produce a hard copy of the report before viewing it.

The screenshot shows a Windows-style dialog box titled "Phone Directory". It contains several sections for configuration:

- Selection:** A dropdown menu set to "ALL ACTIVE EMPLOYEES".
- Grouping:** A dropdown menu set to "SORT BY NAME".
- Run Information:** A "Run" button, the text "Last run date 01/21/15 at 12:59:35", and "Matches 1294".
- Output Options:** A "Directory Title" text box, an "Include SSN" checkbox (unchecked), and three radio buttons for "One Column", "Two Column" (selected), and "Single Line".
- Additional Options:** A "Phone Indicator" checkbox (unchecked), and two radio buttons for "Regular" (selected) and "Barg Unit".
- Actions:** "Preview" and "Print" buttons on the left, and "OK", "Cancel", and "Help" buttons on the right.

Sample Phone Directory Format Report:

TIME: 16:10:02

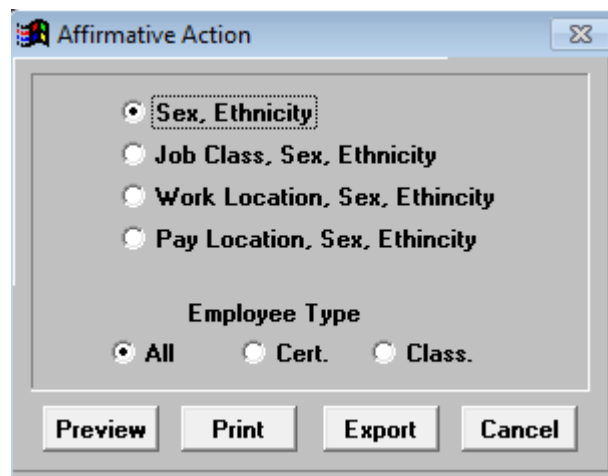
NAME STREET CITY, STATE, ZIP	JOB TITLE WORK TITLE	HOME PHONE WORK PHONE WORK EXT.	NAME STREET CITY, STATE, ZIP	JOB TITLE WORK TITLE	HOME PHONE WORK PHONE WORK EXT.
ABBOTT, GLEN B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	SDC TEACHER SPECIAL ED ROSEMONT HIGH SCHOOL	() - () -	ADKINS, MARIANNE D. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	TEACHER ROSEMONT HIGH SCHOOL	() - () -
ABBOTT, MARTHA B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	ADULT ED HOURLY HARDY ADULT CENTER	() - () -	ADLER, PHILIP D. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	DIRECTOR RESEARCH/CURR DISTRICT OFFICE	() - () -
ABBOTT, MONICA B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	SDC TEACHER SPECIAL ED ROSEMONT HIGH SCHOOL	() - (626) 286-3141	ALBRIGHT, JEAN L. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	ASST PRINCIPAL INSTR. DISTRICT OFFICE	() - () -
ABBOTT, SUSAN B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	ADULT ED HOURLY HARDY ADULT CENTER	() - () -	ALBRIGHT, VINCENT L. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	CUSTODIAN I DISTRICT OFFICE	() - (626) 444-7701
ABRAMS, CHRISTINE B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	TEACHER SOUTH IMPERIAL HIGH	() - () -	ALDRIDGE, SETH L. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	ADULT ED HOURLY HARDY ADULT CENTER	() - () -
ABRAMS, LISA B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	ADULT ED ASST HARDY ADULT CENTER	() - (626) 443-9491	ALEXANDER, ANGELA L. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	TEACHER DISTRICT OFFICE	() - () -
ABRAMS, PATRICIA B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	RSP TEACHER SPECIAL ED ROSEMONT HIGH SCHOOL	() - () -	ALEXANDER, DOROTHY L. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	TEACHER 1 YEAR TEMP NOTINGHAM HIGH SCHOOL	() - () -
ABRAMS, TINA B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	TEACHERS HOURLY DISTRICT OFFICE	() - () -	ALFORD, ALLISON L. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	ACCT CLK II DISTRICT DISTRICT OFFICE	() - (626) 258-4904
ADAMS, ALLISON D. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	TEACHER APPLE HIGH SCHOOL	() - () -	ALFORD, SAMANTHA L. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	ADULT ED COUNSELOR HARDY ADULT CENTER	() - () -
ADCOCK, EVAN D. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	INSTRUCTIONAL AIDE NOTINGHAM HIGH SCHOOL	() - (626) 443-6181	ALLEN, PAT L. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA. 90242	TEACHER APPLE HIGH SCHOOL	() - (626) 444-9201

Affirmative Action Report

The **Affirmative Action Report** provides statistical data frequently needed for various reporting requirements. This report has four different formats. It is also available in Excel export file format. Additional field data is included in the export file.

To view or print this report:

1. Select **Reports | Fixed Reports | Affirmative Action**.
2. Click the radio button in front of the report format you want to produce.
3. Click the radio button in front of the employee type to include in the report.
4. Click **Preview** to view online report or click **Print** to produce a hard copy of the report before viewing it.
5. Click **Export** to save an Excel file to the designated export path. The export file will automatically open in Excel.



Sample Affirmative Action Format Report:

SAMPLE SCHOOL DISTRICT		Affirmative Action Report																		All Employees			
Date:	12/02/15																						
Time:	16:20:24																						
		By Sex																					
																				Other			
																				Other	Pacific		
Sex	African American	American Indian	Asian Indian	Cambodian	Chinese	Filipino	Guamanian	Hawaiian	Hispanic	Hmong	Japanese	Korean	Laotian	Asian	Islander	Samoaan	Tahitian	Vietnamese	White	Total			
F	9	3	2	1	14	6	0	1	443	0	0	1	0	3	26	0	0	6	176	701			
M	7	1	0	2	4	1	0	0	250	0	2	3	0	4	16	0	0	3	155	448			
Totals:	16	4	2	3	18	7	0	1	693	0	2	4	0	7	52	0	0	9	331	1,149			

Longevity Report

The **Longevity Report** groups employees by 5-year increments up to 40 years based on the date field and associated period range entered by the user. This report is also available in Excel export file format. Additional field data is included in the export file.

To view or print this report:

1. Select **Reports | Fixed Reports | Longevity**.
2. Select the appropriate date field from the drop-down list.
3. Enter the appropriate date range for the number of years selected (e.g., for FY 14-15 enter the period from 07/01/1974 to view employees with 40 years of service).
4. Enter up to 4 employee status values and 1 employee type, if desired, in the designated fields.
5. Type the title to print at the top of the report in the Report Titles field if desired.
6. Click **Run**. An Excel export file is automatically created and a message indicating the process is complete will appear in the top right corner when the report is ready.
7. Export files will be saved to **C:\pcprods\EXPORTS** or the designated path.
8. Click **Preview** to view online report or click **Print** to produce a hard copy of the report before viewing it.

ORIG HIRE DATE	From	To
40 Year Employees	07/01/1974	06/30/1975
35 Year Employees	07/01/1979	06/30/1980
30 Year Employees	07/01/1984	06/30/1985
25 Year Employees	07/01/1989	06/30/1990
20 Year Employees	07/01/1994	06/30/1995
15 Year Employees	07/01/1999	06/30/2000
10 Year Employees	07/01/2004	06/30/2005
5 Year Employees	07/01/2009	06/30/2010

Employee Stat A

Employee Type N

Report Titles
CLASSIFIED LONGEVITY
FOR THE PERIOD

Preview Print

Close Run

Last Run
01/21/2015
14:55:20

Sample Longevity Format Report:

SAMPLE SCHOOL DISTRICT			
CLASSIFIED LONGEVITY			Date: 12/02/2015
FOR THE PERIOD			Time: 16:32:55
Date	Name	Job Classification	Work Location

40-Year Employees - 07/01/1974 - 06/30/1975			

10/23/1974	ALFORD, ALLISON L.	ACCT CLK II DISTRICT	DISTRICT OFFICE
35-Year Employees - 07/01/1979 - 06/30/1980			

09/26/1979	SHELTON, CLAIRE H.	TECHNOLOGY SPECIALIST II	DISTRICT OFFICE
10/24/1979	HOUSE, JEREMY O.	PARENT ED ASST	HARDY ADULT CENTER
12/01/1979	LOWRY, CURTIS O.	ATH EQUIP/PE FACIL CUST	ROSEMONT HIGH SCHOOL
12/12/1979	CLINE, EDGAR L.	ACCT CLK ACTIVITIES	NOTINGHAM HIGH SCHOOL
12/17/1979	STARK, ALICIA T.	OFFICE CLERK III	APPLE HIGH SCHOOL
02/04/1980	BISHOP, CLAIRE I.	OFFICE CLERK II	HARDY ADULT CENTER
30-Year Employees - 07/01/1984 - 06/30/1985			

09/01/1984	CARTER, LORRAINE A.	ADMINISTRATIVE SECRETARY	HARDY ADULT CENTER
09/07/1984	BYRD, JOHNNY Y.	PURCHASING SUPERVISOR	DISTRICT OFFICE
09/20/1984	REESE, ANDREA E.	EXECUTIVE SECRETARY	DISTRICT OFFICE
09/25/1984	MURPHY, PATRICK U.	MAINTENANCE WORKER II	ROSEMONT HIGH SCHOOL
10/01/1984	NOLAN, NICHOLAS O.	PARENT ED ASST	HARDY ADULT CENTER
11/08/1984	STEPHENSON, GEORGE T.	PERSONNEL CLERK	DISTRICT OFFICE
11/30/1984	WALTERS, EVAN A.	OFFICE CLERK IV	DISTRICT OFFICE
02/06/1985	MCCORMICK, WILLIAM C.	OFFICE CLERK III	APPLE HIGH SCHOOL
03/06/1985	HAN, VERONICA A.	OFFICE CLERK II	HARDY ADULT CENTER
04/17/1985	GODWIN, RALPH O.	PARENT ED ASST	HARDY ADULT CENTER
25-Year Employees - 07/01/1989 - 06/30/1990			

TB Expiration Report

The **TB Expiration Report** lists employees whose TB test results expire within a specified period. This report has options for creating a mail merge export file and mailing labels.

To view or print this report:

1. Select **Reports | Fixed Reports | TB Expiration**.
2. Enter the TB test expiration date range for the report.
3. Check *Selection Criteria* options as appropriate.
4. Enter a name for the mail merge database export file as appropriate.
5. Click **Go**.
6. Click **Preview** below *List Output* to view online report or click **Print** to produce a hard copy of the report before viewing it.
7. Click **Get Label Form** to select the label type if applicable.
8. Click **Preview** below *Label Output* to view labels online or click **Print** to produce a hard copy of the labels before viewing them.

The screenshot shows the 'TB-Date Processor' application window. It is divided into several sections:

- Selection Criteria:** Contains checkboxes for 'Active' (checked), 'Non-Certificated' (checked), 'Leave' (unchecked), and 'Certificated' (checked). There are two date dropdown menus, both set to '09/2014', with labels 'TB Dates' and 'From & To' below them. A 'Close' button is on the right, and a 'Go' button is below the date fields. A '10 Matches' indicator is at the bottom right of this section.
- List Output:** Features 'Preview' and 'Print' buttons. Below them is a text box containing 'TB Dates Expiring on 09/2014' and a 'List Titles' label.
- Mail Merge Export File:** Includes a text box with 'TB_DATES' (labeled 'File Name') and a dropdown menu with 'Database' (labeled 'Type of Export'). A 'Make Mail Merge File' button is at the bottom.
- Label Output:** Features 'Get Label Form' and 'Build Label Form' buttons. Below them is a text box and 'Preview' and 'Print' buttons.

Sample TB Expiration Format Report:

SAMPLE SCHOOL DISTRICT
TB Dates Expiring on 09/2014

EID	Name	Tb Date	Job Title	Work Title
VS9861086	BLAKE,HUGH L.	09/2014	CLASS CO-CURRICULAR	DISTRICT OFFICE
PV3859682	BLOOM,LINDSAY L.	09/2014	RESOURCE TEACHER	ROSEMONT HIGH SCHOOL
JR4804385	BRIGGS,DOROTHY R.	09/2014	ADULT ED HOURLY	HARDY ADULT CENTER
JZ9210916	CHEN,ALFRED H.	09/2014	ADULT ED HOURLY	HARDY ADULT CENTER
FP8937945	CHU,CHRIS H.	09/2014	DAY TO DAY SUB	DISTRICT OFFICE
TJ8428693	HORNE,SAM O.	09/2014	CUSTODIAN SUB	DISTRICT OFFICE
WC9192474	HOUSE,JOANNA O.	09/2014	ASST PRINCIPAL STUD	NOTINGHAM HIGH
CG2764101	ROY,KENT O.	09/2014	TEACHERS HOURLY	DISTRICT OFFICE
KT8072768	STERN,GREG T.	09/2014	CAMPUS SUPERVISOR	ARROWHEAD HIGH
BE4808883	THORNTON,CLYDE H.	09/2014	TEACHER	DISTRICT OFFICE

10 Employees

Employee Cleanup Report

The **Employee Cleanup Report** is a form that displays current employee and dependent information along with corresponding blank fields that can be completed by the employee. This report includes an option to create a checklist to help track the forms.

To view or print this report:

1. Select **Reports | Fixed Reports | Employee Cleanup**.
2. Select an employee from the drop-down list or leave the field blank to include all employees.
3. Click the radio button in front of **Classified** or **Certificated** as appropriate.
4. Select a field from the Sort By drop-down list to sort report information.
5. Check the box in front of *Letters*, *Check List*, and *No Dependents* as appropriate. *No Dependents* is used in conjunction with the *Letters* option.
6. Type special instructions or messages in the field provided to print the text on the bottom portion of the form.
7. Click **Run**.

The screenshot shows a window titled "Employee Verification Letter Gener...". The interface includes the following elements:

- Employee name: ABBOTT, GLEN B. with a dropdown menu showing -AZ618E.
- Employee type: Radio buttons for **Classified** (selected) and **Certificated**.
- Sort By: A dropdown menu showing ACADEMIC RANK.
- Run button: A button labeled **Run** with a dotted border.
- Records: A status bar showing "1 Records".
- Options: Checkboxes for **Letters** (checked), **Check List**, and **No Dependents**.
- Buttons: **Preview** and **Print** buttons.
- Special Instructions: A text area with the prompt "Enter Special Instructions Below." containing the text "Please Read Below:" and "Enter the dependents as follows."
- Close button: A button labeled **Close**.

Sample Employee Cleanup/Verification Format Report:

ROSEMONT HIGH SCHOOL Work Location																										
Current Information on File		Change Employee Information																								
ABBOTT, GLEN B. Name 9300 IMPERIAL HIGHWAY, Street DOWNEY, CA 90242 City State Zip () - () - Home Phone Work Phone Work Ext 01/01/50 FEMALE HISPANIC Date of Birth Gender Ethnicity _____ Education Level in Years _____ Emergency Contact _____ Emergency Relationship () - Emergency Contact Phone 09/01/03 09/01/12 09/01/03 Hire Date Anniversary Date Seniority Date SDC TEACHER SPECIAL ED Job Classification		_____ Name _____ Street _____ City State Zip () - () - * Home Phone Work Phone Work Ext / / Date of Birth Gender Ethnicity _____ Education Level in Years _____ * _____ Emergency Contact _____ * _____ Emergency Relationship _____ * _____ Emergency Contact Phone / / / / / / Hire Date Anniversary Date Seniority Date _____ Job Classification																								
Current Dependent(s) on File																										
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> <th style="text-align: left;">SSN</th> <th style="text-align: left;">Dob</th> <th style="text-align: left;">Relationship</th> </tr> </thead> <tbody> <tr> <td colspan="4">No Dependents on File....</td> </tr> </tbody> </table>			Name	SSN	Dob	Relationship	No Dependents on File....																			
Name	SSN	Dob	Relationship																							
No Dependents on File....																										
Change Dependent Information																										
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> <th style="text-align: left;">SSN</th> <th style="text-align: left;">Dob</th> <th style="text-align: left;">Relationship</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>_____</td> <td>/ /</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>/ /</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>/ /</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>/ /</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>/ /</td> <td>_____</td> </tr> </tbody> </table>			Name	SSN	Dob	Relationship	_____	_____	/ /	_____	_____	_____	/ /	_____	_____	_____	/ /	_____	_____	_____	/ /	_____	_____	_____	/ /	_____
Name	SSN	Dob	Relationship																							
_____	_____	/ /	_____																							
_____	_____	/ /	_____																							
_____	_____	/ /	_____																							
_____	_____	/ /	_____																							
_____	_____	/ /	_____																							
Please Read Below:																										
Enter the dependents as follows.																										

See sample of Employee Cleanup/Verification Check List on next page.

Sample Employee Cleanup/Verification Check List:

SAMPLE SCHOOL DISTRICT		
EMPLOYEE CLEAN-UP CHECK LIST		
NAME	RETURNED LETTER	ENTERED CHANGES
ABBOTT, GLEN B.	<input type="checkbox"/>	<input type="checkbox"/>

Statement of Benefits Report

The **Statement of Benefits Report** produces a list of employer-paid benefits for each employee with options to include dependents and other employer contributions from HRS Screen 023. This report is also available in several export file formats. Additional file data is included in the export file.

To view or print this report:

1. Select **Reports | Fixed Reports | Statement of Benefits**.
2. Filter data using bargaining unit, employee type, and/or pay basis as appropriate. Leave fields blank to produce reports for each employee.
3. Check *Print Dependents and/or Deductions (Screen 23)* to include this information on the report.
4. Enter the file name and select a file type to create an export file.
5. Click **Run**.
6. Click **Preview** to view online report or click **Print** to produce a hard copy of the report before viewing it.
7. Click **Export** to save the file to the designated export path. The export file will automatically open if you select Excel as the export file type.

Statement of Benefits

Bargaining Unit Employee Type Pay Basis

Print Dependents Deductions (Screen 23)

Export File Name: BENEFITS Excel

Cancel Run Preview Print Export

See sample report on next page.

Sample Statement of Benefits Format Report:

SAMPLE SCHOOL DISTRICT		Statement of Benefits		12/04/15	
				08:21:51	
ABBOTT, GLEN B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242					
ID: AZ6185329		Primary Job Code: 082800			
		Primary Job Title: SDC TEACHER SPECIAL ED			
Employment Date: 09/01/2003		Work Location: ROSEMONT HIGH SCHOOL			
Eligibility:		Date of Birth: 01/01/1950			
Emergency Contact:		Pay Cycle: C2			
Relationship:		Contact Phone: () -			

Code	Plan Type	Plan	Coverage	Employee Deduction	Employer Contrib.	Effective Date	End Date
VKA	MEDICAL	VEBKAI5	03	160.17	1,205.48	00/00/0000	00/00/0000
DPP	DENTAL	DLTAPPO	03	0.00	183.87	00/00/0000	00/00/0000
VSP	VISION	VISION	01	0.00	27.04	00/00/0000	00/00/0000
BLC	LIFE 1	BLCLIF	01	0.00	2.40	00/00/0000	00/00/0000
222	CTA-UNI	222	01	97.00	0.00	00/00/0000	00/00/0000
Employee / Employer Totals:				257.17	1,418.79		

	Dependents	DOB	Benefits				
			1	2	3	4	5
Spouse:							
Children:							

Salary Projection Report

The **Salary Projection Report** produces salary and benefits projections for the current year as well as up to three future fiscal years. Employee benefit projections are calculated using rates entered by the user. There are also options for incorporating step, salary, and benefit increases. This report is only available as an Excel export file.

To view or print this report:

1. Select **Reports | Fixed Reports | Salary Projection**.
2. Select job status and pay basis values from the drop-down lists. The other drop-down selections are optional, however, if a work calendar is selected, refer to the next page for additional instructions.
3. Enter or update employee benefit rates to project benefit costs. Enter PEPRA retirement rates in the STRS (New Employees) and PERS (New Employees) fields.
4. Enter the export file name. The report is only produced in the Excel format.
5. Click radio button to select projection year.
6. Complete remaining fields as appropriate.
7. Click **Execute**. The file will be saved to the designated export path and automatically open in Excel.

See sample report on Page V-21.



A percentage increase to benefits will affect all health and welfare benefits.

Work Calendar Modification

Select a work calendar from the drop-down list when the number of work calendar days and/or pay periods reflected in HRS differs from the number of days and/or periods used to project salary and benefits. Only assignments tied to the work calendar selected will appear on the report.

To modify work calendar days and months:

- 1) Select a work calendar from the drop-down list.
- 2) Enter the number of work calendar days to use for hourly assignment projections in the Cal Days field if different from the number reflected on the HRS calendar. Calendar days entered will be reflected in Column Z (Work_Days) of the report.
- 3) Enter the number of work calendar months to use for monthly and lump sum projections in the Cal Months field if different from the number of HRS pay months. Fractions with up to two digits after the decimal can be entered. Calendar months entered will be reflected in Column AH (New_Months) of the report.

Salary Projection

Status: **A** Type: **[]** Pay Basis: **M.H.L.** Barg Unit: **[]** Work Cal: **A** Cal Days: **175** Cal Months: **9.50**

Fund: **[]** Resource: **[]** Goal: **[]** Function: **[]** Object: **[]** Location: **[]**

STRS	14,430	Medicare	1,450
STRS (New Employees)	14,430	OASDI	6,200
PERS	15,800	OASDI Max	127,200.00
PERS (New Employees)	15,800	Unemployment	0.050
Workers Comp	2,510	OPEB	0.000

Export File Name: **PROJECTION** Step Increase Current Year
 Next Year
 2 Years Out
 3 Years Out

Percentage Increase:
 Salary: **0.000**
 Benefits: **0.000**

Cancel **Execute** **Save**

Sample Salary Projection Report in Excel Format:

See field descriptions on pages V-22 to V-25.

(Report contains 113 columns of data)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	eid	name	emp_type	sacs_fund	sacs_resrc	resource	sresource	goal	function	object	location	percent	years_srv	or_hire_dt	empl_stat
2	AC5356941	MCNAMARA, FRANCIS C.	N	01.0	00000.0	00000	0	00000	82000	2310	4160000	100	31	19830314	A
3	AC5356941	MCNAMARA, FRANCIS C.	N	01.0	00000.0	00000	0	00000	82000	2230	4160000	100	31	19830314	A
4	AD1458259	LAWRENCE, NEAL A.	N	01.0	00000.0	00000	0	00000	27000	2410	4010000	100	20	19940101	A
5	AD5768990	MAY, ALEX A.	C	11.0	06390.0	06390	0	41320	10000	1160	5060000	100	10	20040207	A
6	AF7577158	ROSS, DOUGLAS O.	N	11.0	39050.0	39050	0	41100	10000	2130	5060000	100	06	20071107	A
7	AF7577158	ROSS, DOUGLAS O.	N	11.0	39050.0	39050	0	41100	10000	2130	5060000	100	06	20071107	A
8	AF9773340	WOODS, PAUL O.	C	01.0	00000.0	00000	0	00000	21000	1970	6092000	100	27	19870902	A
9	AG0342519	MANGUM, PATRICIA A.	N	13.0	53100.0	53100	0	00000	37000	2220	4035000	100	17	19970306	A
10	AG4675724	ROSENTHAL, LOUIS O.	C	01.0	00000.0	00000	0	00000	27000	1911	4020000	100	27	19870902	A
11	AG4675724	ROSENTHAL, LOUIS O.	C	01.0	00000.0	00000	0	00000	27000	1310	4020000	100	27	19870902	A
12	AG5548133	BOWDEN, CHRISTINA O.	N	01.0	00000.0	00000	0	00000	82000	2210	4030000	100	14	20000710	A
13	AG7969159	BARTON, DARLENE A.	N	01.0	00000.0	00000	0	00000	82000	2310	4010000	100	21	19930908	A
14	AH4324351	MERRITT, SHIRLEY E.	N	01.0	00000.0	00000	0	00000	31100	2210	4010000	100	05	20090129	A
15	AJ2161191	RICH, MICHELLE I.	C	11.0	06390.0	06390	0	41320	10000	1160	5060000	100	33	19810201	A
16	AJ2222600	RICH, JESSICA I.	N	13.0	53100.0	53100	0	00000	37000	2220	4165000	100	08	20051103	A
17	AJ2380876	GRANT, EVAN R.	C	11.0	06390.0	06390	0	41330	10000	1130	5060000	100	04	20100513	A
18	AM4039152	O'BRIEN, CAROLINE .	N	11.0	06390.0	06390	0	46300	27000	2430	5060000	100	23	19910207	A
19	AM4039152	O'BRIEN, CAROLINE .	N	11.0	06390.0	06390	0	46300	27000	2430	5060000	100	23	19910207	A
20	AN4693314	EASON, STACY A.	C	11.0	06390.0	06390	0	41330	10000	1130	5060000	100	12	20020128	A
21	AN5721573	WHITEHEAD, MIKE H.	N	01.0	00000.0	00000	0	00000	82000	2210	4160000	100	17	19970306	A
22	AN5721573	WHITEHEAD, MIKE H.	N	01.0	00000.0	00000	0	00000	82000	2230	4160000	100	17	19970306	A
23	AN8967775	PEARSON, LEON E.	N	13.0	53100.0	53100	0	00000	37000	2220	4165000	100	07	20070308	A
24	AP6655817	SCARBOROUGH, ALISON C.	N	01.0	00000.0	00000	0	00000	27000	2410	4010000	100	22	19911105	A
25	AP8245457	BOWMAN, KELLY O.	N	01.0	33100.0	33100	0	57500	11300	2110	6090000	100	06	20080115	A
26	AQ3199637	CHRISTIAN, JENNIFER H.	N	11.0	06390.0	06390	0	41320	10000	2130	5060000	100	06	20080107	A
27	AQ3199637	CHRISTIAN, JENNIFER H.	N	11.0	06390.0	06390	0	41320	10000	2130	5060000	100	06	20080107	A
28	AR1454432	GOLDEN, SCOTT O.	N	11.0	06390.0	06390	0	41320	10000	2130	5060000	100	21	19930701	A
29	AR1454432	GOLDEN, SCOTT O.	N	11.0	06390.0	06390	0	41320	10000	2130	5060000	100	21	19930701	A

Salary Projection Report Field Descriptions

Column	Field	Field Description	Source
A	EID	Employee Identification Number	HRS EDB/Screen 003
B	Name	Employee Last and First Name	HRS EDB/Screen 003
C	Emp_Type	Employee Type	HRS EDB/Screen 003
D	Sacs_Fund	Fund with Sub Fund 01.0-xxxxx.x-xxxxx-xxxxxx-xxxx-xxxxxxx	HRS EDB/Screen 006
E	Sacs_Resrc	Resource with Project Year xx.x-14000.0-xxxxx-xxxxxx-xxxx-xxxxxxx	HRS EDB/Screen 006
F	Resource	Resource xx.x-14000.x-xxxxx-xxxxx-xxxx-xxxxxxx	HRS EDB/Screen 006
G	Sresource	Project Year xx.x-xxxxx.6-xxxxx-xxxxx-xxxx-xxxxxxx	HRS EDB/Screen 006
H	Goal	Goal xx.x-xxxxx.x-11100-xxxxx-xxxx-xxxxxxx	HRS EDB/Screen 006
I	Function	Function xx.x-xxxxx.x-xxxxx-10000-xxxx-xxxxxxx	HRS EDB/Screen 006
J	Object	Object xx.x-xxxxx.x-xxxxx-xxxxx-1000-xxxxxxx	HRS EDB/Screen 006
K	Location	Location xx.x-xxxxx.x-xxxxx-xxxxx-xxxx-1000000	HRS EDB/Screen 006
L	Percent	Percent Full Time	HRS EDB/Screen 005
M	Years_Srv	Years of Service	Report Calculation
N	Or_Hire_Dt	Original Hire Date	HRS EDB/Screen 003
O	Empl_Stat	Employment Status	HRS EDB/Screen 003
P	Job_Stat	Job Status	HRS EDB/Screen 004
Q	Ann_Sal	Annual Salary	Report Calculation
R	Pro_Ann_Sa	Prorated Annual Salary	Report Calculation
S	Sal_Base	Salary Base	HRS CDB/Screen 024/025
T	Ft_Rate	Full Time Rate	HRS EDB/Screen 005
U	Pro_Ft_Ra	Prorated Full Time Rate	Report Calculation
V	Sal_Rate	Salary Rate	HRS EDB/Screen 005
W	Pro_Sal	Prorated Salary	Report Calculation
X	Pct_Ft	Percent Full Time	HRS EDB/Screen 005
Y	Pro_Pct_Ft	Prorated Percent Full Time	Report Generated
Z	Work_Days	Work Days*	HRS EDB/Screen 005 or User Defined
AA	Pro_Work_D	Prorated Work Days	Report Calculation
AB	A_Dt	Anniversary Date	Report Generated
AC	Pay_Bas	Pay Basis	HRS EDB/Screen 005
AD	Sal_Sched	Salary Schedule	HRS EDB/Screen 005

*This is a user defined value. It will default to the HRS calendar work days value if nothing is entered.

Salary Projection Report Field Descriptions (Continued)

Column	Field	Field Description	Source
AE	Sal_Range	Salary Range/Column	HRS EDB/Screen 005
AF	Sal_Step	Salary Step	HRS EDB/Screen 005
AG	Pay_Months	Pay Months	HRS EDB/Screen 005
AH	New_Months	Projected Months*	HRS EDB/Screen 005 or User Defined
AI	Pay_Cycle	Pay Cycle	HRS EDB/Screen 005
AJ	Pos_No	Position Number	HRS EDB/Screen 004
AK	Ret_Plan	Retirement Plan	HRS EDB/Screen 005
AL	Wrk_Cal	Work Calendar	HRS EDB/Screen 005
AM	New_Pers	Pension Reform Status**	HRS EDB/Screen 003
AN	Stip_Desc1	Periodic Stipend 1 Description	HRS EDB/Screen 005
AO	Stip_Amt1	Periodic Stipend 1 Amount	HRS CDB/Screen 026
AP	Stip_Amt1a	Annual Periodic Stipend 1	Report Calculation
AQ	Stip_Desc2	Periodic Stipend 2 Description	HRS EDB/Screen 005
AR	Stip_Amt2	Periodic Stipend 2 Amount	HRS CDB/Screen 026
AS	Stip_Amt2a	Annual Periodic Stipend 2	Report Calculation
AT	Stip_Desc3	Periodic Stipend 3 Description	HRS EDB/Screen 005
AU	Stip_Amt3	Periodic Stipend 3 Amount	HRS CDB/Screen 026
AV	Stip_Amt3a	Annual Periodic Stipend 3	Report Calculation
AW	Stip_Desc4	Periodic Stipend 4 Description	HRS EDB/Screen 005
AX	Stip_Amt4	Periodic Stipend 4 Amount	HRS CDB/Screen 026
AY	Stip_Amt4a	Annual Periodic Stipend 4	Report Calculation
AZ	Stip_Desc5	Periodic Stipend 5 Description	HRS EDB/Screen 005
BA	Stip_Amt5	Periodic Stipend 5 Amount	HRS CDB/Screen 026
BB	Stip_Amt5a	Annual Periodic Stipend 5	Report Calculation
BC	D1stip_Cd	Dated Stipend 1 Code	HRS EDB/Screen 005
BD	D1stip_Lvl	Dated Stipend 1 Level	HRS EDB/Screen 005
BE	D1stip_Ern	Dated Stipend 1 Earnings Type	HRS EDB/Screen 005
BF	D1stip_Des	Dated Stipend 1 Description	HRS EDB/Screen 005
BG	Dstp_Amt1	Dated Stipend 1 Amount	HRS CDB/Screen 026
BH	Dstp_Amt1a	Annual Dated Stipend 1	Report Calculation
BI	D2stip_Cd	Dated Stipend 2 Code	HRS EDB/Screen 005
BJ	D2stip_Lvl	Dated Stipend 2 Level	HRS EDB/Screen 005
BK	D2stip_Ern	Dated Stipend 2 Earnings Type	HRS EDB/Screen 005

*This is a user defined value. It will default to the Pay_Months value if nothing is entered.

PEPRA status is indicated by "1." Classic status is indicated by "."

Salary Projection Report Field Descriptions (Continued)

Column	Field	Field Description	Source
BL	D2stip_Des	Dated Stipend 2 Description	HRS EDB/Screen 005
BM	Dstp_Amt2	Dated Stipend 2 Amount	HRS CDB/Screen 026
BN	Dstp_Amt2a	Annual Dated Stipend 2	Report Calculation
BO	Tot_Stip	Total Periodic Stipend	Report Calculation
BP	Pro_Stip	Total Prorated Periodic Stipend	Report Calculation
BQ	Tot_Dstip	Total Dated Stipend	Report Calculation
BR	Pro_Dstip	Total Prorated Dated Stipend	Report Calculation
BS	Ann_Stip	Total Annual Periodic Stipend	Report Calculation
BT	Pro_A_Stip	Total Annual Prorated Periodic Stipend	Report Calculation
BU	Ann_Dstip	Total Annual Dated Stipend	Report Calculation
BV	Pro_A_Dstp	Total Annual Prorated Dated Stipend	Report Calculation
BW	Pj	Prime Job*	HRS EDB/Screen 004
BX	Pro_Wrk_Hr	Prorated Work Hours	Report Calculation
BY	Wrk_Hrs_Pd	Work Hours Paid	HRS EDB/Screen 005
BZ	Barg_Unit	Bargaining Unit Code	HRS EDB/Screen 004
CA	Job_Class	Job Class Number	HRS EDB/Screen 004
CB	Wrk_Loc_No	Work Location Number	HRS EDB/Screen 004
CC	Wrk_Site	Work Location Sub-Site	HRS EDB/Screen 004
CD	Pay_Loc	Pay Location	HRS EDB/Screen 003
CE	Dist_Cd_3	District Code 3	HRS EDB/Screen 014
CF	Dist_Cd_4	District Code 4	HRS EDB/Screen 014
CG	Wrk_Loc_Nm	Work Location Name	HRS EDB/Screen 004
CH	Job_Title	Job Class Title	HRS EDB/Screen 004
CI	Barg_Desc	Bargaining Unit Code Description	District Codes Table 028
CJ	Pay_Desc	Pay Location Description	HRS EDB/Screen 003
CK	Anniver_Dt	Anniversary Date	HRS EDB/Screen 004
CL	Step_Incr	Step Increase	Report Generated
CM	STRS	STRS Contribution	Report Calculation
CN	PERS	PERS Contribution	Report Calculation
CO	Medicare	Medicare Contribution	Report Calculation
CP	OASDI	OASDI Contribution	Report Calculation
CQ	Cafeteria	Cafeteria	HRS EDB/Screen 020
CR	Income	Income Protection	HRS EDB/Screen 020
CS	Unemploy	Unemployment Insurance	Report Calculation

*Prime job is indicated by "X."

Salary Projection Report Field Descriptions (Continued)

Column	Field	Field Description	Source
CT	Worker_Cmp	Workers Comp	Report Calculation
CU	PERS_Red	PERS Reduction	Report Calculation
CV	OPEB_Con	OPEB Contribution	Report Calculation
CW	OPEB2_Con	OPEB2 Contribution	Report Calculation
CX	Total_Ben	Total Benefits	Report Calculation
CY	Total_Sal	Total Salary and Benefits	Report Calculation
CZ	In_Lieu	Cash in Lieu	Report Calculation
DA	Medical	Employer Paid Medical	Report Calculation
DB	Dental	Employer Paid Dental	Report Calculation
DC	Vision	Employer Paid Vision	Report Calculation
DD	Life_Insur	Employer Paid Life Insurance	Report Calculation
DE	LARISA	LARISA	Report Calculation
DF	Other	Other	Not Populated
DG	STRS_PERS	STRS/PERS	Report Generated
DH	ARP_LARISA	ARP or LARISA	HRS EDB/Screen 021
DI	TSA_Contrib	TSA Contribution	Report Calculation

Third Party TSA Extract Report

The **Third Party TSA Extract Report** provides 403(b) or 457 data in the Excel format that can be used to monitor contributions. Calendar year-to-date employee deductions and employer contributions are included for PC Labor subscribers. This report is also available in several export file formats.

To view or print this report:

1. Select **Reports | Fixed Reports | Third Party Extracts**.
2. Click **Current Year Labor Data** to select the path to the PC Labor data file.
3. Click the radio button to select the pre-tax retirement plan data type for the report. The file name will automatically be entered based on the plan selected. You can overwrite the file name and change the default file format if desired.
4. Enter the appropriate calendar year and check the appropriate month.
5. Select the mailing label type from the drop-down list.
6. Click **Run**. The file will be saved to the designated export path.
7. Click **Preview** to view labels online or click **Print** to produce a hard copy of the labels before viewing them.

Third Party Extracts

Current Year Labor Data

C:\PCPRODS\LAB2014\DATABASE\

TSA (403b) 457 Roth (403b)

TSA_DATA - XLS
File Name Ext

Excel
Type

Calendar Year: 2014

January April July October
 February May August November
 March June September December

Mailing Label Type:

Address - Last Name

See sample report and labels on next page.

Sample Third Party TSA Extract Report in Excel Format (selected columns shown):

*This report contains 24 columns of data.


	K	P	Q	R	S	T	U	V	W	X
1	emp_type	gtn	vendor	name	ded_amt	con_amt	beg_date	end_date	cytd_ded	cytd_con
2	N	060	0000008040	AMERICAN FIDELITY ASSURANCE CO	200	50	00000000	00000000	1400	350
3	N	060	0000008473	LIFE INSURANCE CO OF SOUTHWEST	250	25	00000000	00000000	1750	175
4	C	060	0000008473	LIFE INSURANCE CO OF SOUTHWEST	365	0	00000000	00000000	2555	0
5	C	060	0000008600	NORTH AMER CO FOR LIFE & HLTH	250	0	00000000	00000000	1600	0
6	C	060	0000008600	NORTH AMER CO FOR LIFE & HLTH	2454	0	00000000	00000000	13362	0
7	N	060	0000008040	AMERICAN FIDELITY ASSURANCE CO	200	10	00000000	00000000	1400	70
8	C	060	0000008600	NORTH AMER CO FOR LIFE & HLTH	400	100	00000000	00000000	2800	700
9	C	060	0000008642	FIRST INTERSTATE BANK OF DENVR	200	0	00000000	00000000	1400	0
10	C	062	0000008936	WADDELL & REED	200	0	00000000	00000000	1400	0
11	C	060	0000008927	THE VANGUARD GROUP INC	3000	500	00000000	00000000	3000	3500
12	N	060	0000008040	AMERICAN FIDELITY ASSURANCE CO	50	0	00000000	00000000	350	0
13	N	060	0000008504	MIDLAND NATIONAL LIFE INS CO	25	75	00000000	00000000	175	525
14	C	060	0000008045	CAPITAL BANK AND TRUST CO	909	0	00000000	00000000	6363	0
15	C	060	0000008865	USAA 8910	600	125	00000000	00000000	4200	875
16	C	060	0000008040	AMERICAN FIDELITY ASSURANCE CO	1650	0	00000000	00000000	11550	0
17	C	060	0000008650	PACIFIC LIFE INSURANCE CO	500	0	00000000	00000000	3500	0
18	C	060	0000008473	LIFE INSURANCE CO OF SOUTHWEST	680	55	00000000	00000000	4760	385
19	C	060	0000008473	LIFE INSURANCE CO OF SOUTHWEST	300	0	00000000	00000000	2100	0
20	C	060	0000008473	LIFE INSURANCE CO OF SOUTHWEST	0	25	00000000	00000000	0	175
21	N	060	0000008927	THE VANGUARD GROUP INC	1500	0	20120901	00000000	5925.09	0
22	C	060	0000008740	SECURITY BENEFIT LIFE OF TOPEK	0	250	00000000	00000000	0	1750

Sample Third Party TSA Extract Labels:

MCNAMARA, FRANCIS C. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242	RAYNOR, SANDY A. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242	RAYNOR, SANDY A. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242
MIDDLETON, NEAL I. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242	WOODS, PAUL O. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242	BARTON, DARLENE A. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242
JAMES, BRANDON A. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242	ABRAMS, PATRICIA B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242	PERKINS, SARA E. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242
WILLIS, BETH I. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242	HESTER, JESSICA E. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242	ABBOTT, GLEN B. 9300 IMPERIAL HIGHWAY, DOWNEY,, CA 90242

Quick Lists Reports

There are four **Quick Lists** available in PC LLL. The reports are easy to run and contain frequently used data. The lists are only available in the Excel format.

- Credentials
- Benefits Summary (4 reporting options)
 - Benefits Summary by Plan
 - Benefits Summary Scattergram Plan
 - Benefits Summary by Bargaining Unit
 - Benefits Summary Scattergram Bargaining Unit
- Stipends (3 reporting options)
 - Stipends by Name
 - Stipends by Name and Account Number
 - Stipends
- Vacant Positions (2 reporting options) 
 - Vacant Positions List
 - Vacant Positions List with Labor

To view or print a quick list report:

1. Select **Reports | Fixed Reports | Quick Lists**.
2. Select one of the reports. The Excel export file will automatically open and save to the designated export path.



Vacant Positions List reports include active FTE vacancies. Active FTE positions with incumbents on unpaid leave are reflected as vacancies.

See sample reports on next page.

Sample Credentials Quick List Report in Excel Format:

*This report contains 59 columns of data.

	A	B	C	D	E	F	G	H	I	J	K	L
1	eid	name	job_title	job_num	sal_sched	sal_range	sal_step	barg_unit	title	type	type_desc	cbest
2	QU9816634	MAXWELL,WADE A.	TEACHER	1	T	003	05	DE	TC1	CL	Clear	02/01/2005
3	SA4484423	ALEXANDER,ANGELA L.	TEACHER	1	T	005	30	DE	SA12	C8	Clear	01/01/1900
4	SA4484423	ALEXANDER,ANGELA L.	TEACHER	1	T	005	30	DE	SC1A	CL	Clear	01/01/1900
5	SA4484423	ALEXANDER,ANGELA L.	TEACHER	1	T	005	30	DE	TC1	CL	Clear	01/01/1900
6	HB2514157	FLEMING,FRANK L.	TEACHER	2	T	004	22	DE	TC1	CL	Clear	04/01/1989
7	RG5453050	GODFREY,ARNOLD O.	TEACHER	1	T	005	22	DE	SA17	C8	Clear	02/01/1991
8	RG5453050	GODFREY,ARNOLD O.	TEACHER	1	T	005	22	DE	TC1	CL	Clear	02/01/1991
9	XG6900007	BOND,HENRY O.	ADULT ED HOURLY	3	H	001	05	AE	1969	C8	Clear	11/01/1985
10	XG6900007	BOND,HENRY O.	ADULT ED HOURLY	3	H	001	05	AE	SA7	C8	Clear	11/01/1985
11	XG6900007	BOND,HENRY O.	ADULT ED HOURLY	3	H	001	05	AE	TC1	CL	Clear	11/01/1985
12	XG6900007	BOND,HENRY O.	ADULT ED HOURLY	3	H	001	05	AE	TC3H	CL	Clear	11/01/1985
13	XG6900007	BOND,HENRY O.	ADULT ED HOURLY	3	H	001	05	AE	TC4A	CL	Clear	11/01/1985
14	BH5071454	SNYDER,BRETT N.	RSP TEACHER SPECIAL ED	1	T	005	06	DE	TC1	CL	Clear	06/01/2001
15	BH5071454	SNYDER,BRETT N.	RSP TEACHER SPECIAL ED	1	T	005	06	DE	TC2	CL	Clear	06/01/2001

Sample Benefits Summary by Bargaining Unit Report in Excel Format:

	A	B	C	D	E	F
1	barg_unit	plan	descript	total_emp	tot_deduct	tot_contri
2	AE	ALR	AMERFID	4	225.24	0
3	AE	ADR	AMFIDIP	3	149.04	0
4	AE	BLC	BLCRLIF	23	0	55.2
5	AE	BPS	BLCRPOS	1	0	0
6	AE	DHM	DLTAHMO	6	0	219.1
7	AE	DPP	DLTAPPO	16	33.12	1762.23
8	AE	MDR	MED REI	1	200	0
9	AE	PVD	PRVIDT	1	15.6	0
10	AE	VPC	VBPCHMO	6	878.23	6863.68

Sample Stipends by Name and Account Number in Excel Format:

*This report contains 45 columns of data.

	A	B	C	D	E	F	G	H	I	J	K	L
1	eid	barg_unit	emp_type	name	job_title	pi_pos_no	pay_cycle	pay_bas	pay_months	wrk_cal	sal_sched	
2	SX0813730	CS	N	ABRAMS,LISA B.	ADULT ED ASST NIGHT DIF	262984	H1	H	10	P	C	
3	VK7099864	RP	C	ABRAMS,TINA B.	TEACHERS HOURLY	X 192067	C5	H	10	F	O	
4	UG2283931	NE	C	ADLER,PHILIP D.	CERTIFICATED STIPEND	194061	C3	H	11	C	X	
5	TT9810511	NE	C	ALBRIGHT,JEAN L.	CERTIFICATED STIPEND	114004	C3	H	11	C	X	
6	WQ2924306	CS	N	ALBRIGHT,VINCENT L.	CUSTODIAN I	X 211020	E4	M	12	A	C	
7	BA7564869	DE	C	ATKINS,RONNIE T.	TEACHER	X 121045	C2	M	10	F	T	
8	MS5074336	CS	N	AYERS,REGINA Y.	ADULT ED ASST NIGHT DIF	262924	H1	H	10	P	C	
9	JC2707722	CS	N	BAIRD,CHRISTINA A.	ADULT ED ASST NIGHT DIF	X 262987	H1	H	10	P	C	
10	JV3541823	CS	N	BAKER,THOMAS A.	ADULT ED ASST NIGHT DIF	262924	H1	H	10	P	C	

Sample Vacant Positions Report with Labor Information in Excel Format:

	A	B	C	D	E	F	G	H	I	J	K
1	POS_NUMB	POS_STAT	STATUS_DT	JOB_CLASS	POS_J_DESC	PRO_FTE	PRO_VAC	WORK_LOC	POS_W_DESC	POS_ACCT	POS_PCT
2	000002	A	7/1/2017	700000	TEACHER, REGULA	33.000	1.000	73000LMI	LA MERCED INTERMEDIATE	01.0-00000.0-13100-10000-1110-0007300	100.000
3	000012	A	7/1/2017	063000	SPECIAL ED. CAS	40.438	0.750	15900D/O	SPECIAL SERV-SPL ED COST	01.0-65000.0-57740-11300-2110-0001590	100.000
4	000025	A	7/1/2017	700000	TEACHER, REGULA	14.000	1.000	56000PHE	POTRERO HEIGHTS ELEMENTARY	01.0-00000.0-13100-10000-1110-0005600	100.000
5	000030	A	7/1/2017	022000	CHILDCARE ASSIS	6.125	0.438	12000D/O	INSTRUCTIONAL ADMINISTRATION	01.0-02400.0-13028-31300-2930-0001290	100.000
6	000035	A	7/1/2017	538000	BUS DRIVER	42.500	1.000	13500D/O	BUSINESS-PUPIL TRANSPORT	01.0-02400.0-00000-36000-2216-0001350	100.000
7	000039	A	7/1/2017	700000	TEACHER, REGULA	78.000	1.000	84000SHS	SCHURR HIGH	01.0-00000.0-13100-10000-1110-0008400	100.000
8	000064	A	7/1/2017	700000	TEACHER, REGULA	69.000	2.000	83000MHS	MONTEBELLO HIGH	01.0-00000.0-13100-10000-1110-0008300	100.000

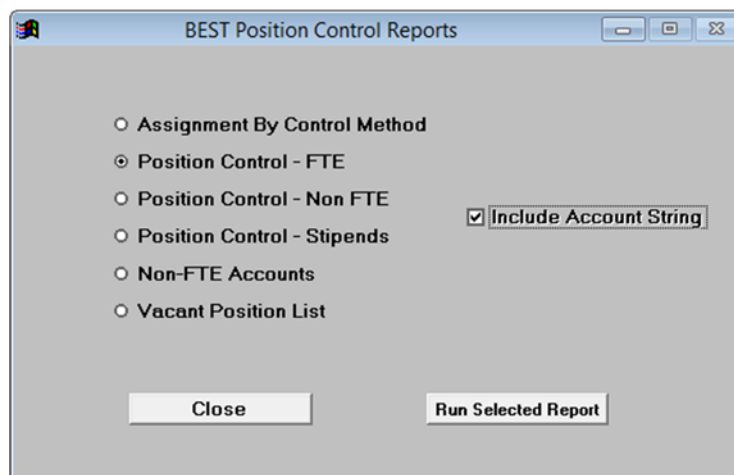
BEST – Position Control Reports

There are six **BEST – Position Control Reports** available in PC LLL. The reports are intended to assist districts with the update of their Position Control data.

- Assignment By Control Method
- Position Control - FTE
 - Available with account string information
- Position Control – Non FTE
 - Available with account string information
- Position Control – Stipends
- Non-FTE Accounts
- Vacant Position List
 - Available with account string information (same report as the Vacant Positions Report in the Quick Lists)

To view or print a quick list report:

1. Select **Reports | Fixed Reports | BEST – Position Control**.
2. Select the radio button in front of the report. If **Include Account String** is not grayed out, that option may be selected to include labor distribution in the report.
3. Click the **Run Selected Report** button and the Excel export file will automatically open and save to the designated export path.



See sample reports on next page.

Sample Assignment By Control Method report:

*This report contains 22 columns of data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Control Method	Position #	Job Type	Job Class	Job Title	EID	Name	Job #	Job Status	Barg Unit	Pay Basis	Work Hours	% Full-time	Work Cal	Sal Schedule
2	F	047006	C	047000	ASST DIRECTOR	ZS7211721	STARK,TONY	1	A	MC	M	8.00	100.00	G	M
3	F	047001	C	047000	ASST DIRECTOR	XL6477777	WILSON,WADE	1	A	MC	M	8.00	100.00	G	M
4	F	047002	C	047000	ASST DIRECTOR	PF4716173	BANNER,BRUCE	7	A	MC	M	8.00	100.00	G	M
5	F	069111	C	069000	ASST PRIN	XF1422124	ROMANOVA,NATALIA	1	A	MC	M	8.00	100.00	I	M
6	F	069101	C	069000	ASST PRIN	HS2677766	BARTON,CLINTON	7	A	MC	M	8.00	100.00	I	M
7	F	069112	C	069000	ASST PRIN	PC2711647	ROGERS,STEVE	1	A	MC	M	8.00	100.00	I	M

Sample Position Control – FTE report:

*This report contains 20 columns of data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Position #	Job Type	Job Class	Job Title	Barg Unit	FTE	Pay Basis	Work Cal	% Full-time	Sal Schedule	Range	Step	Retire Plan	Bene Package	Ben Pkg Mo	Work Location
2	000001	C	000100	SUPERINTENDENT	MC	1.0000	M	G	100.00	Z	001	01	S5	MF	10	B1100
3	000201	C	000200	DEPUTY SUPERINTENDENT	MC	1.0000	M	G	100.00	M	077	05	S5	MF	10	B1100
4	012501	C	012500	CHIEF ED PROGRAMS OFFICER	MC	0.5000	M	G	100.00	M	072	02	S5	MF	10	B3100
5	012501	C	012500	CHIEF ED PROGRAMS OFFICER	MC	0.5000	M	G	100.00	M	072	02	S5	MF	10	B3100
6	013001	C	013000	CHIEF ACADEMIC OFFICER	MC	0.5000	M	G	100.00	M	072	02	S5	MF	10	B6100
7	013001	C	013000	CHIEF ACADEMIC OFFICER	MC	0.5000	M	G	100.00	M	072	02	S5	MF	10	B6100
8	018003	C	018000	DIRECTOR III	MC	1.0000	M	G	100.00	M	046	02	S5	MF	10	F0100

Sample Position Control – Non FTE report:

*This report contains 23 columns of data.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Control Method	Position #	Job Type	Active Date	Job Class	Job Title	Barg Unit	Unit	Dollar	Pay Basis	Work Cal	% Full-time	Sal Schedule
2	P	002001	B	07/01/1994	002000	BOARD OF EDUCATION	EE	0.0000	5700.00	D	A	100.00	Z
3	P	002002	B	07/01/1994	002000	BOARD OF EDUCATION	EE	0.0000	5700.00	D	A	100.00	Z
4	P	002003	B	07/01/1994	002000	BOARD OF EDUCATION	EE	0.0000	5700.00	D	A	100.00	Z
5	P	002004	B	07/01/1994	002000	BOARD OF EDUCATION	EE	0.0000	5700.00	D	A	100.00	Z
6	P	002005	B	07/01/1994	002000	BOARD OF EDUCATION	EE	0.0000	5700.00	D	A	100.00	Z
7	P	002006	B	07/01/1994	002000	BOARD OF EDUCATION	EE	0.0000	5700.00	D	A	100.00	Z
8	P	002007	B	07/01/1994	002000	BOARD OF EDUCATION	EE	0.0000	5700.00	D	A	100.00	Z
9	P	904001	C	07/01/2018	000100	SUPERINTENDENT	MC	0.0000	0.00	H	F	100.00	Z

Sample Position Control – Stipends report:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Control Method	Position #	Job Title	Stip Code 1	Stip Lvl 1	Stip Code 2	Stip Lvl 2	Stip Code 3	Stip Lvl 3	Stip Code 4	Stip Lvl 4	Stip Code 5	Stip Lvl 5	Work Location	Work Sit	Work Location Title
2	F	000001	SUPERINTENDENT											B1100		OFFICE OF SUPT
3	F	000201	DEPUTY SUPERINTENDENT											B1100		OFFICE OF SUPT
4	F	012501	CHIEF ED PROGRAMS OFFICER											B3100		CHIEF EDUC PROGRAM
5	F	013001	CHIEF ACADEMIC OFFICER											B6100		CHIEF ACADEMIC OFF
6	F	018003	DIRECTOR III											F0100		CIS-CURR AND INST S
7	F	018008	DIRECTOR III											S0000		A S M
8	F	018010	DIRECTOR III											J0100		HR-HUMAN RESOURC
9	F	019001	COORDINATOR II											F0100		CIS-CURR AND INST S
10	F	019002	COORDINATOR II											S0000		A S M
11	F	019003	COORDINATOR II											F0000		CIS-ADMIN
12	F	019004	COORDINATOR II											C0000		SSS-STUDENT SUP SEF
13	F	019005	COORDINATOR II											J0800		HR-BEG TCHR PROGR
14	F	019006	COORDINATOR II											C0400		SSS-COMM HEALTH A
15	F	019007	COORDINATOR II											L1200		TS-TECH OUTREACH

Sample Non-FTE Accounts report:

*This report contains 24 columns of data.

	A	B	C	D	E	F	G	H	I	J	K	L
1	LLL Non-FTE Positions by Account											
2												
3	Account	Adopted Budget	Adjusted Budget	CYA	Control Method	Pos. No.	Active Date	YTD Pay	Pro-rated Units	Pro-rated Dollar Amt	Job Class	Job Title
4	01.2-30101.9-35500-10000-1130-0003711	15000.00	15000.00	69.18	P	942212	07/01/2017	0.00	0.00	15000.00	144000	TEACHER ED
5		0.00	0.00	0.00	P	942290	09/01/2018	69.18	0.00	0.00	160000	TEACHER JCS
6	01.2-30101.9-35500-10003-1160-0003711	15994.00	15994.00	0.00	P	946237	07/01/2015	0.00	0.00	15994.00	160000	TEACHER JCS
7	01.2-30101.9-35500-24950-1230-0003711	9000.00	9000.00	0.00	P	943214	07/01/2017	0.00	0.00	9000.00	110000	COUNSELOR
8	01.2-30101.9-36001-10000-1130-0003902	82010.00	82010.00	18147.91	P	942170	07/02/2018	2109.99	0.00	0.00	165000	TEACHER RES SPEC PRG
9		0.00	0.00	0.00	P	942171	09/03/2018	1106.88	0.00	0.00	160000	TEACHER JCS
10		0.00	0.00	0.00	P	942217	07/01/2017	0.00	0.00	82010.00	144000	TEACHER ED
11		0.00	0.00	0.00	P	942218	07/01/2017	7958.97	0.00	0.00	160000	TEACHER JCS
12		0.00	0.00	0.00	P	942270	09/01/2017	8464.20	0.00	0.00	160000	TEACHER JCS

Sample Vacant Position List report:

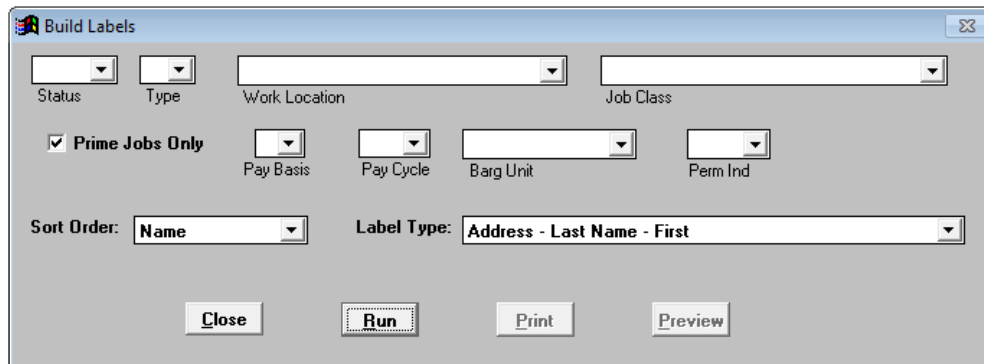
	A	B	C	D	E	F	G	H	I	J
1	POS_NUMB	POS_STAT	STATUS_DT	JOB_CLASS	POS_J_DESC	POS_FTE	PO_FTE_VAC	WORK_LOC	WORK_SITE	POS_W_DESC
2	019004	A	5/16/2017	019000	COORDINATOR II	1.000	1.000	C0000		SSS-STUDENT S
3	019010	A	7/12/2018	019000	COORDINATOR II	1.000	1.000	C0400		SSS-COMM HE
4	019015	A	7/13/2018	019000	COORDINATOR II	1.000	1.000	L1200		TS-TECH OUTRI
5	019027	A	7/16/2018	019000	COORDINATOR II	1.000	1.000	S0000		A S M
6	019032	A	9/19/2018	019000	COORDINATOR II	1.000	1.000	J0800		HR-BEG TCHR F
7	019033	A	11/1/2018	019000	COORDINATOR II	1.000	1.000	C0400		SSS-COMM HE
8	019034	A	11/1/2018	019000	COORDINATOR II	1.000	1.000	C0400		SSS-COMM HE
9	019065	A	7/18/2007	019000	COORDINATOR II	1.000	1.000	J0800		HR-BEG TCHR F
10	025001	A	1/11/2018	025000	COORDINATOR III	1.000	1.000	S0000		A S M

PC LLL Label Wizard

The Label Wizard enables users to easily create a variety of preformatted Avery 5160 labels.

To create labels:

1. Select **Report | Label Wizard** from the menu.
2. Use filters as appropriate.
3. Select sort order from the drop-down list as appropriate.
4. Select one of the following label types from the drop-down list.
 - Name (Last,First) / Address
 - Name (First Last) / Address
 - Name (First Last) / Job Class / Address
 - Work Location / Name (Last,First)
 - Work Location / Name (First Last)
 - Job Class / Name (Last,First)
 - Job Class / Name (First Last)
 - Name (Last,First) / SSN
5. Click **Run**.



6. Click **Preview** to view the labels online.

ABBOTT, GLEN B.
9300 IMPERIAL HIGHWAY
DOWNEY, CA 90242

ABBOTT, JULIE B.
9300 IMPERIAL HIGHWAY
DOWNEY, CA 90242

ABBOTT, MARION B.
9300 IMPERIAL HIGHWAY
DOWNEY, CA 90242

7. Click the *printer* icon in the Print Preview toolbar to produce the labels. Print from the Build Labels window for additional printing options.



8. Press **ESC** on the keyboard or click the **X** in the upper right corner to return to the Build Labels window.

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Section 6

Report Components

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Report Components

This section covers the three primary components needed to create a report definition (report): selection criteria, grouping definition, and format. All three components are needed to successfully generate reports, labels, letters, or export files. The selection criteria component is also used to filter certain PC LLL explore output.

Report Component	Description
Selection Criteria (Records)	What records do you want to see? (e.g., certificated 12 month employees)
Grouping Definition (Rows)	How do you want to arrange records? (e.g., sort, total, and page break by work site)
Format (Columns)	What data do you want to see in columns on the report? (e.g., name, EID, job class)

Selection Criteria

Selection criteria determines which employee records to include in a list or report. Create selection criteria to limit the data to a specific group of records or include all records. In simplest terms, selection criteria is one or more pre-defined conditions saved with a specific name. It does not impact sorting or formatting of data.

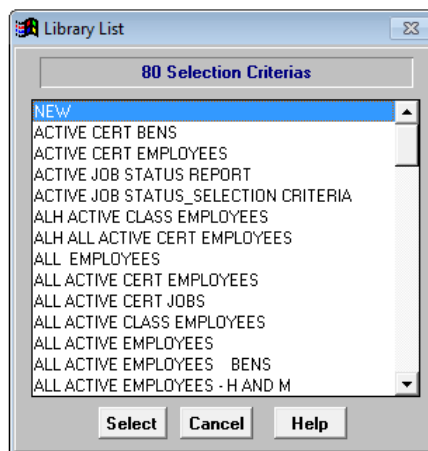
Create New Selection Criteria

There are two options for creating new selection criteria. The first option is covered in this section of the user manual. The second is covered in *Section 7 – Building & Viewing Custom Reports*.

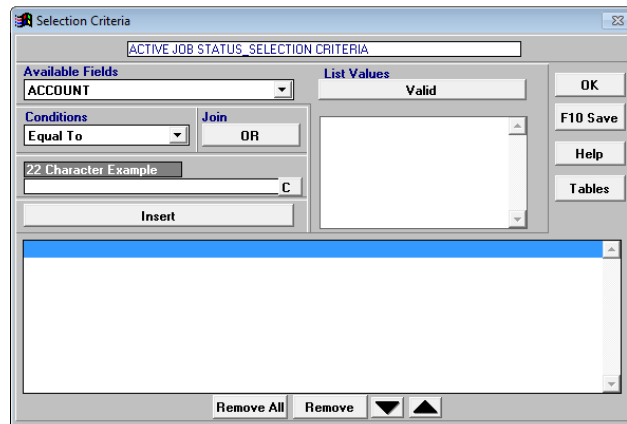
Menu Menu Item	Description
Report Selection Criteria	Build selection criteria for use with Explore features or the Report Builder
Report Report Definition	Build selection criteria within the Report Builder as a component of the report

To create a new selection criteria:

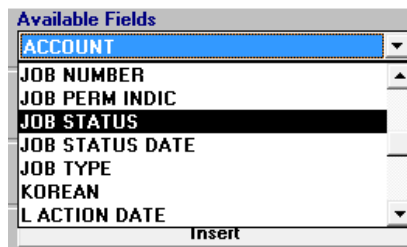
1. Select **Report | Selection Criteria** from the menu.
2. Highlight New and click **Select**.



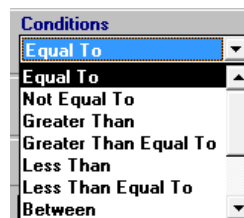
3. Enter a name for the selection criteria. There is no set naming convention for report components. Users can enter any name.



4. Select a field from the **Available Fields** drop-down list. Refer to the **Appendix** on pages A-3 through A-19 to view the list of fields available.



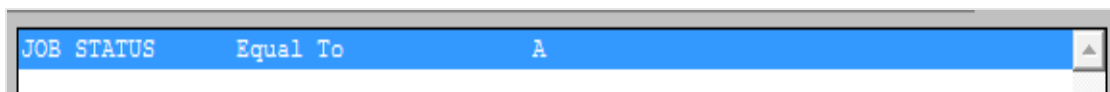
5. Select a comparison operator from the **Conditions** drop-down list. Refer to the **Appendix** on Page A-21 to view the complete list of operators and descriptions.



6. Click **Valid** under **List Values** to display available field values. Select a value from the drop-down list or enter the value for the condition in the **1 Character Example** box.

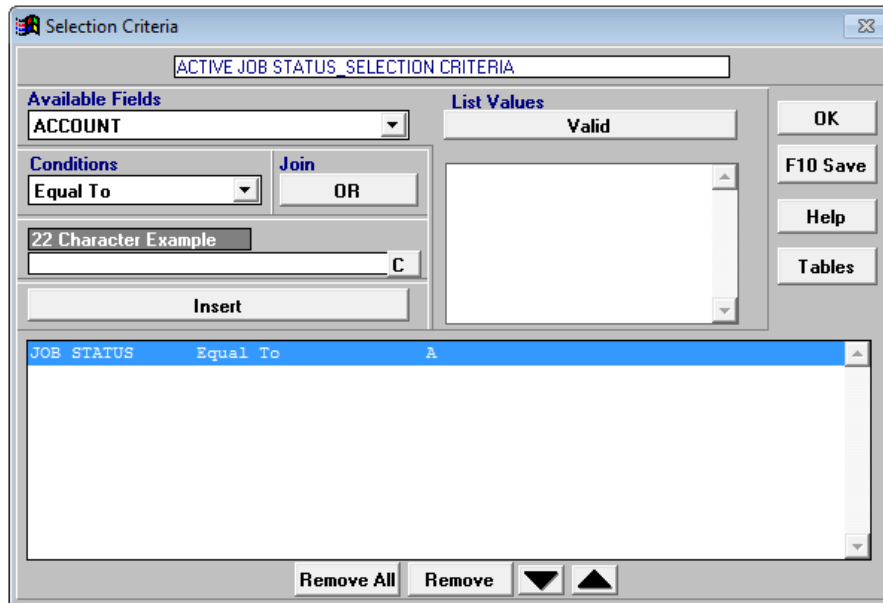


7. Click **Insert** to add this condition to the selection criteria.

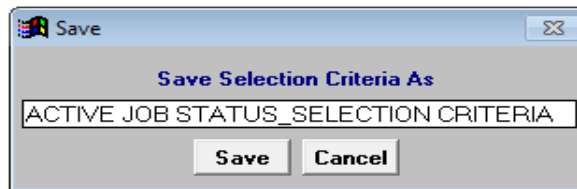


8. Repeat steps 4 - 7 to add additional conditions.

9. Click **F10 – Save** or press **F10** when finished.



10. Click **Save**.



11. Click **OK** or **Esc** to exit Selection Criteria.

Other Selection Criteria Features

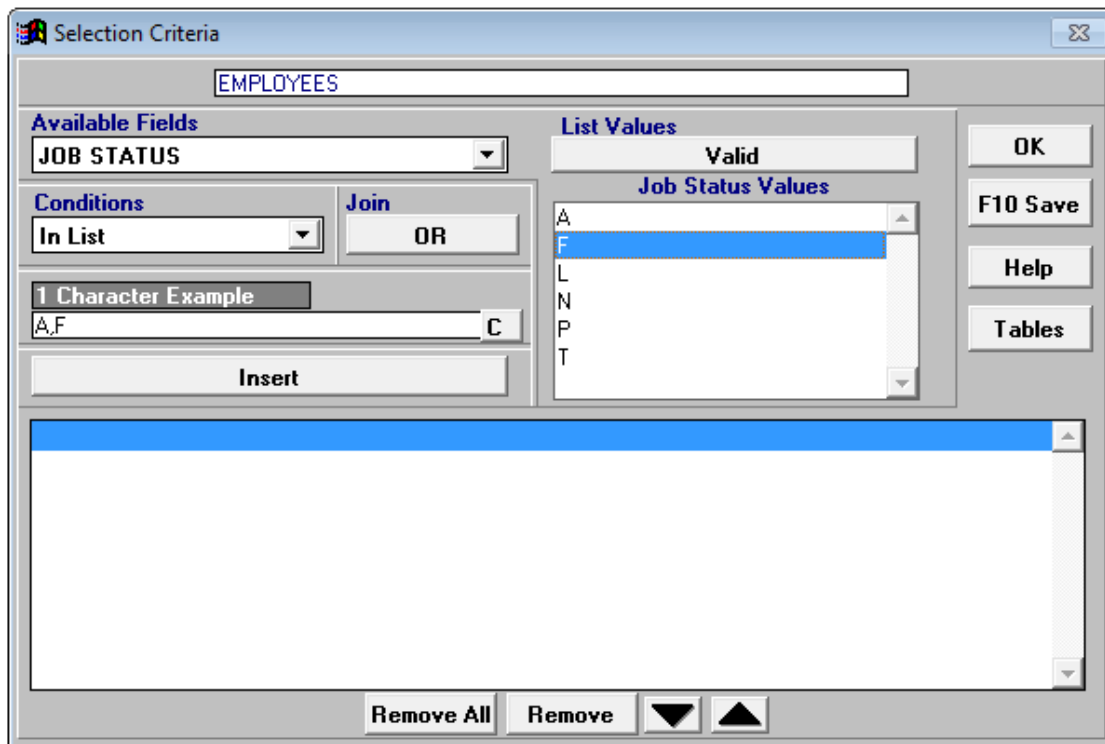
Selection criteria contains one or more conditions. Each condition limits the records that appear in the report or in the explore list.

Create a Condition with a List of Values

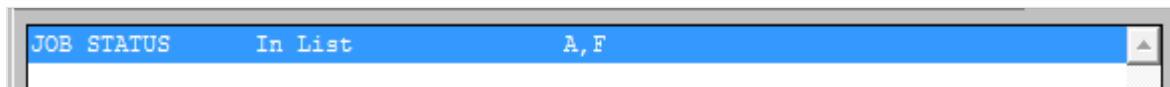
Create a condition to select records with values that match or do not match a list of example values. The **In List** operator selects records with values that match the example values. The **Not In List** operator selects records with values that do not match the example values.

To create a condition to match a list of values:

1. Select a field from the **Available Fields** drop-down list.
2. Select **In List** from the **Conditions** drop-down list.
3. Click **Valid** to display available values for the selected field.
4. Double-click the condition values. The values will appear in the **Example** box.



5. Click **Insert** to add the condition.

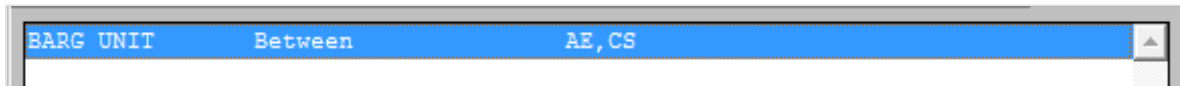


Create a Condition with a Range of Values

Create conditions to select records with values that include a range of values or exclude a range of values. A **Between** operator will select records with values between the beginning and ending range boundaries as well as values equal to the two boundary values. A **Not Between** operator will select records with values outside the boundary range.

To create a condition to select records within a range of values:

1. Select a field from **Available Fields** drop-down list.
2. Select **Between** from the **Conditions** drop-down list.
3. Click **Valid** to display a list of possible values for the selected field.
4. Double-click the beginning range value in the **Valid** drop-down box. If the value is not listed, type it in the **Example** box.
5. Double-click the ending range value in the **Valid** drop-down box. If the value is not listed, type a comma (,) followed by the value.
6. Click **Insert** to add the condition to the selection criteria.



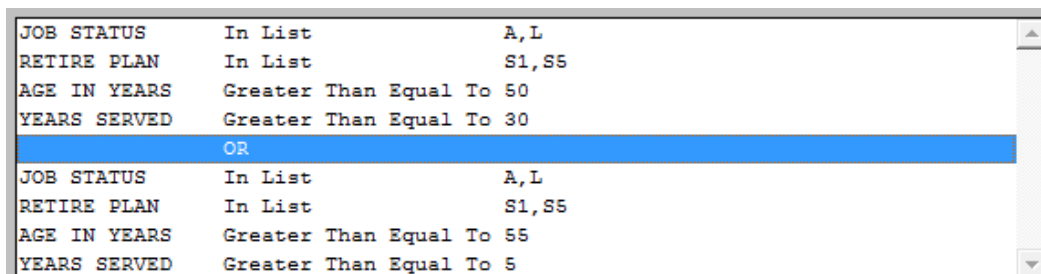
Condition Connectors

Condition connectors join two or more selection criteria conditions. By default multiple conditions are joined with an invisible **AND**. The first condition must be true, **AND** the second condition must be true, **AND** so on for a record to be selected.

Conditions can also be joined together using **OR** to create more complex selection criteria. When **OR** is used, only one condition must be true for a record to be selected. If there is a condition set (more than one condition) preceding or following **OR**, only one condition or condition set must be true, but all conditions within the set must be true for a record to be selected.

To join conditions using **OR**:

1. Create the first condition and insert it in the selection criteria.
2. Click **OR**.
3. Create the second condition and insert it into the list.
4. Repeat steps 2-3 to join additional conditions using **OR**.

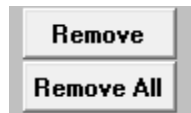


Edit Selection Criteria

Remove Conditions from the Selection Criteria

Remove conditions from selection criteria:

- Click **Remove** to delete only the selected condition
- Click **Remove All** to clear all of the conditions



Change Condition Order

Use the up and down arrow buttons to change the order of the conditions. In most cases, the order of the conditions will not affect search results.

- Click the down arrow button to move the selected condition down one position
- Click the up arrow button to move the selected condition up one position



Change Existing Selection Criteria

To edit conditions after selection criteria has been saved:

1. Select **Report | Selection Criteria** from the menu.
2. Highlight the selection criteria to edit and click **Select**.
3. Double-click to edit a condition line. **Insert** will change to **Overwrite**.
4. Make changes to the condition.
5. Click **Overwrite** to update the condition.
6. Repeat steps 2 - 4 to insert, remove, or arrange other conditions as needed.
7. Click **Save** if using the same selection criteria name. Otherwise, enter a new name and click **Save**.
8. Press "Y" to overwrite the existing selection criteria.

Name already exists, overwrite Y or N ?

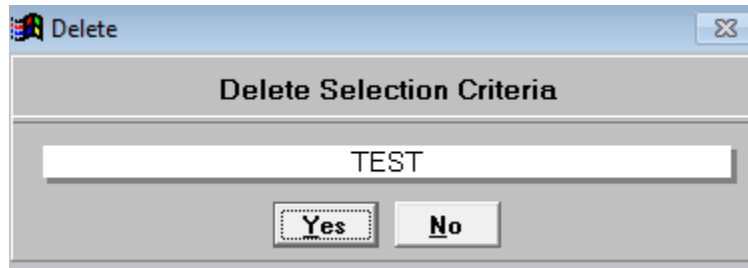


The message above will not appear if the selection criteria is saved using a new name.

Delete Selection Criteria

To delete selection criteria:

1. Access the Report Builder by selecting **Report | Report Definition** from the menu.
2. Select the desired selection criteria to delete from the *Selection Criteria* drop-down list.
3. Click **Delete** at the bottom of the window or press **Delete** on the keyboard.
4. Click **Yes**.



Grouping Definition

Grouping definition determines the following elements of a report:

- Sort order
- Subtotaling
- Placement of page breaks

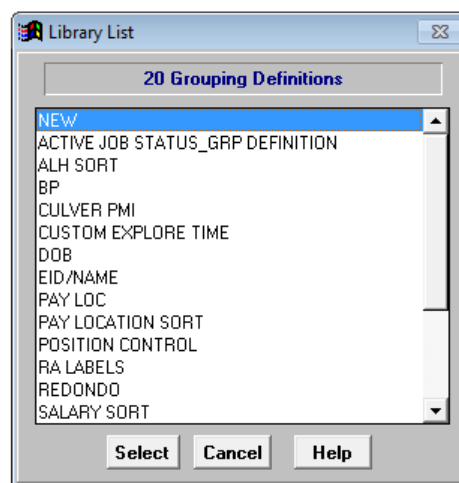
There are two options for creating new grouping definitions. The first option is covered in this section of the user manual. The second is covered in *Section 7 - Building & Viewing Custom Reports*.

Menu Menu Item	Description
Report Grouping Definition	Build grouping definition for use with the Report Builder
Report Report Definition	Build grouping definition within the Report Builder as a component of the report

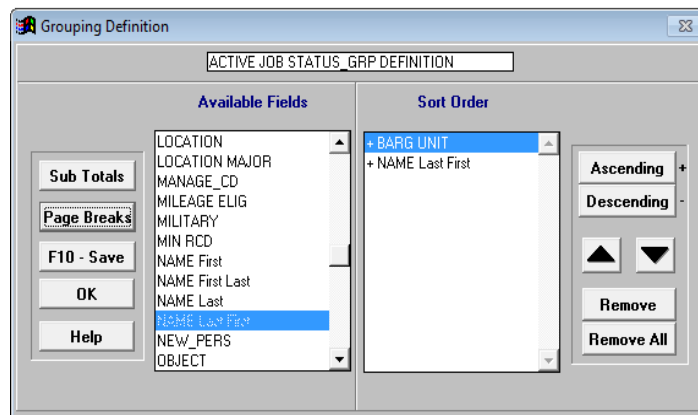
Create New Grouping Definition

To create a new grouping definition:

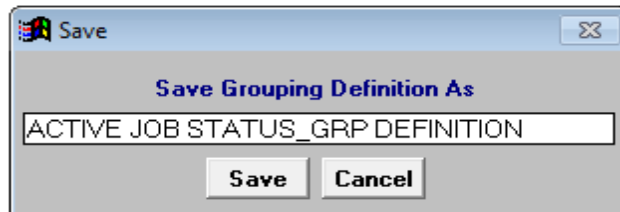
1. Select **Report | Grouping Definition** from the menu.
2. Highlight New and click **Select**.



3. Enter a name for the grouping definition.
4. Double-click a field in the **Available Fields** drop-down box to add it to the **Sort Order** drop-down box.
5. Repeat Step 4 to include additional fields.
6. Use the **up** or **down arrow** to change the sort order.
7. Click **Ascending** or **Descending** to establish the sort order of the selected field.
 - A plus sign (+) appears in front of fields with records sorted in ascending order.
 - A minus sign (-) appears in front of fields with records sorted in descending order.
8. Highlight a field name in the **Sort Order** drop-down box and click **Remove** to remove it from the sort order. Click **Remove All** to remove fields from the **Sort Order** drop-down box.
9. Click **F10 – Save**.



10. Click **Save**.



11. Click **OK** or press **Esc** to exit Grouping Definition.

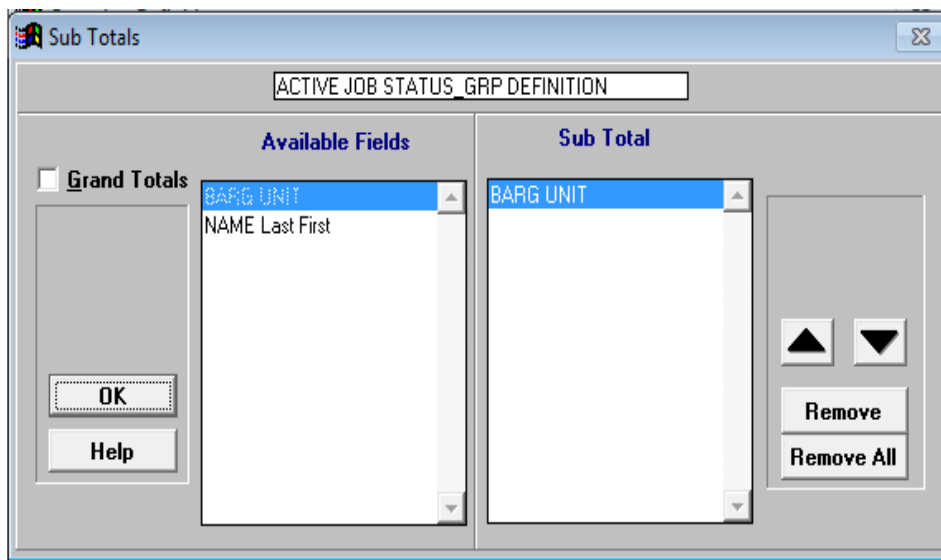
Other Grouping Definition Features

Create Subtotals

Subtotal amounts on the report when the subtotal field value changes.

To create report subtotals:

1. Click **Sub Total** on Grouping Definition to access Sub Totals. The subtotals definition name will be the same as the grouping definition name.
2. Double-click a field in the **Available Fields** drop-down box to add it to the **Sub Total** drop-down box. Only fields listed in the **Sort Order** drop-down box on Grouping Definition can be used to subtotal data.
3. Repeat Step 2 to include additional subtotals.
4. Use the **up** or **down arrow** to change the subtotal order.
5. Click **OK** when finished to return to Grouping Definition.



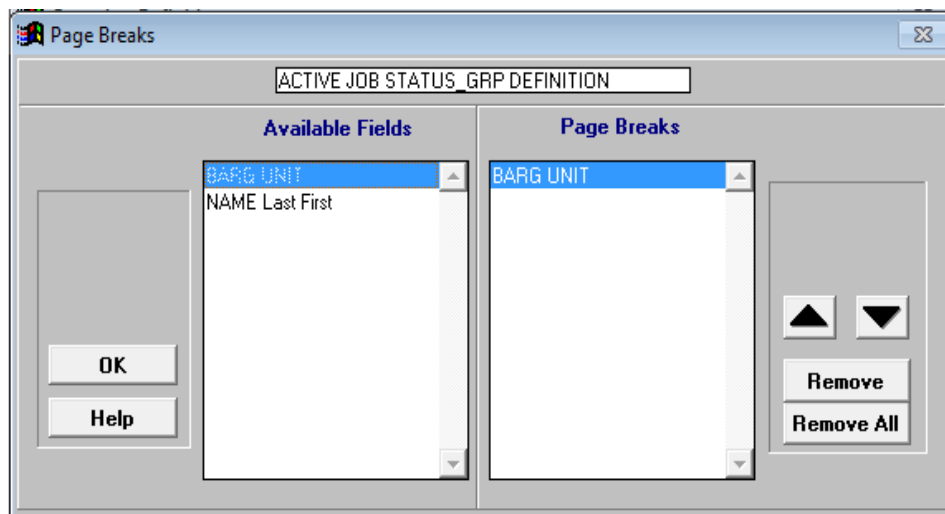
6. Click **F10 – Save** on Grouping Definition to save the change.
7. Click **OK** to exit Grouping Definition.

Create Page Breaks

Create a page break when the page break field value changes.

To create page breaks:

1. Click **Page Breaks** on Grouping Definition to access Page Breaks. The page breaks definition name will be the same as the grouping definition name.
2. Double click a field in the **Available Fields** drop-down box to move it to the **Page Breaks** drop-down box. Only fields listed in the **Sort Order** drop-down box on Grouping Definition can be used to create page breaks.
3. Repeat Step 2 to include additional page breaks.
4. Click **OK** when finished to return to Grouping Definition.



5. Click **F10 – Save** on Grouping Definition to save the change.
6. Click **OK** to exit Grouping Definition.

Output Formats

Format determines which fields appear on reports, labels, letters, export files, and the order in which the fields appear. Each column on reports and in output files represents a data field. Each row represents a record that matches selection criteria conditions.

There are four functional output formats in PC LLL. **List Format** and **List Export** are the output formats most often used. The label and letter output types are not used as often because many users find it easier to export data from the application to create letters and labels using the mail merge feature in Microsoft Word or other software.

- List Format
- List Export
- Label Format
- Letter Format

The screenshot shows the 'Report Builder' dialog box. At the top, there is a 'Reports' section with a dropdown menu, a 'New' button, and a 'Top of Page Title for List' text box. Below this is a 'Last Run' field with two input boxes and a '18' value. The main area is divided into 'Selection Criteria' and 'View Box'. The 'Selection Criteria' section includes a dropdown menu, 'Sorts/Subtotals/Pagebreaks' dropdown, and a 'List Format' section highlighted with a red dashed box. This section contains an 'Export File Name' field, a 'Type' dropdown, a 'Label Format' section with a 'Format' checkbox, and a 'Letter Format' dropdown. Below these is a 'Graph Format' dropdown. At the bottom, there are buttons for 'Edit' (F3), 'Delete' (DEL), 'Save' (F10), 'Run' (F11), 'Output' (F1), and 'Close'.

List Format

List Format determines which field data appears as columns on a report and the order in which the fields appear. The number of columns displayed on a report depends on the page orientation, paper size, font size, and page width. Up to three lines of field data per record can be reflected on a report. The format does not affect the sort order.

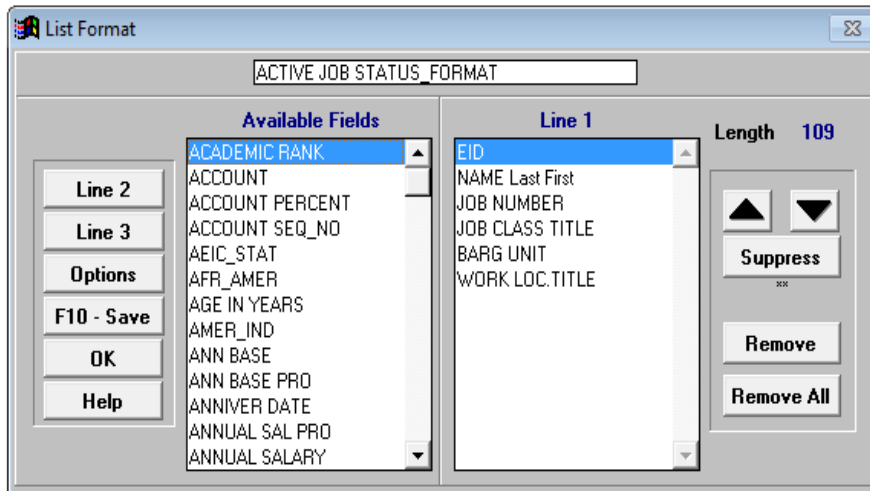
Create List Format

To create a new list format:

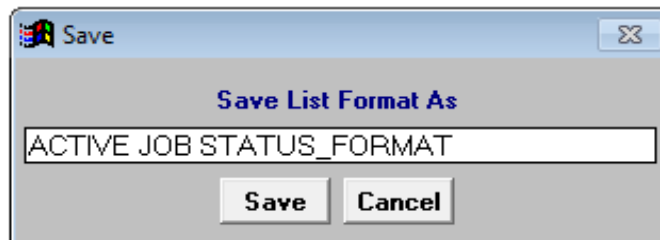
1. Select **Report | Report Definition** from the menu.
2. Select the blank value from the **List Format** drop-down list in the Report Builder.
3. Click **Edit** or double-click the *Nothing in Here* line in the View Box to go to List Format.

The screenshot shows the 'Report Builder' window. At the top, there is a 'Reports' section with a dropdown menu, a 'New' button, and a 'Last Run' field. Below this is the 'Selection Criteria' section with a dropdown menu. The 'View Box' on the right contains the text 'Nothing In Here'. The 'List Format' section is highlighted in blue and includes an 'Export File Name' field, a 'Type' dropdown, and a 'Format' checkbox. Below this are sections for 'Label Format', 'Letter Format', and 'Graph Format', each with a dropdown menu. At the bottom, there are buttons for 'Edit' (F3), 'Delete' (DEL), 'Save' (F10), 'Run' (F11), 'Output' (F1), and 'Close'.

4. Enter a name for the list format.
5. Double-click a field name(s) in the **Available Fields** drop-down box to add it to the **Line 1** drop-down box.
6. Repeat Step 5 to include additional fields.
7. Click **Line 2** and/or **Line 3** as appropriate to add additional lines of field data.
8. Click **F10 – Save**.



9. Click **Save**.



10. Click **OK** or press **Esc** to exit List Format.

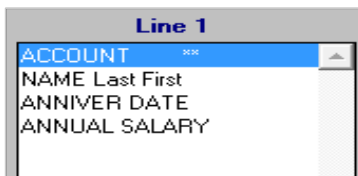
List Format Options

Suppress Report Data

Suppress prevents the field value from repeating on subsequent lines. If an account appears on a report 20 consecutive times, the account will only print on the first line. The next 19 lines in the account field will be blank.

To suppress field data:

1. Highlight the field and click **Suppress**. Two asterisks (**) are displayed next to fields with the suppress option.



2. Click **F10 – Save** to update the format.

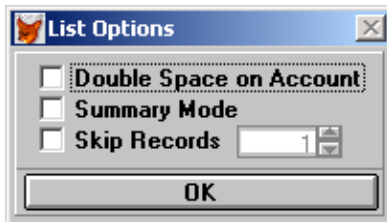
List Options

List Options provides additional format features. The option(s) selected will be applied to all reports.

Option	Description
Double Space on Account	Adds an additional line between each account
Summary Mode	Only reflects total lines
Skip Records	Skips the number of records entered in the adjacent drop-down box

To select additional format features:

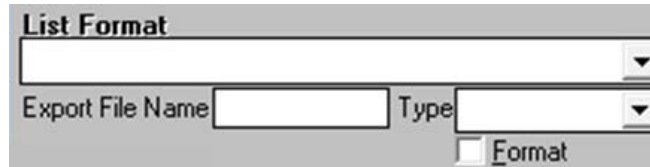
1. Click **Options** on List Format to display format options.
2. Check the box next to the selected option(s).
3. Click **OK** to save the settings and return to List Format.



4. Click **F10 – Save** to update the format.

List Export

List Export creates electronic output files in various file formats. Export files contain the same fields and records reflected on the formatted report but do not include subtotals, totals, page breaks, report titles, or other grouping and format features.



The screenshot shows a dialog box titled "List Format". It contains a dropdown menu at the top, an "Export File Name" text input field, a "Type" dropdown menu, and a "Format" checkbox at the bottom right.

Create List Export File

To create a list export file:

1. Select an existing report from the **Reports** drop-down list.
2. Type the export file name in the *Export File Name* field. Do not include spaces or symbols as part of the file name.
3. Select the export file format from the **Type** drop-down list. The following file formats are available:
 - Excel
 - Lotus 123
 - Database (DBF) – use when spreadsheet file exceeds 16,383 lines
 - Text
 - Tab Delimited (Tab)
 - Comma Delimited (Comma)
4. Check the *Format* box to produce text in its proper case. Otherwise, the text is in capital letters.



The case for acronyms or abbreviations may not reflect accurately if the *Format* box is checked. Refer to the **Appendix** on Page A-19 for instructions on opening DBF file(s) with Excel.

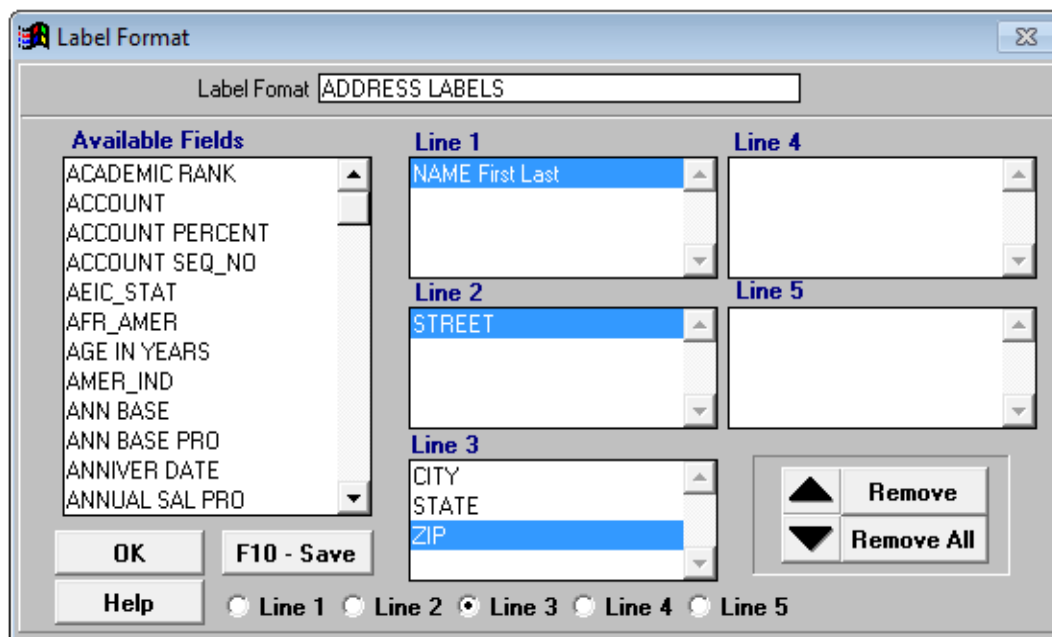
Label Format

Label Format creates mailing labels with up to five different lines. One or more lines can be left blank.

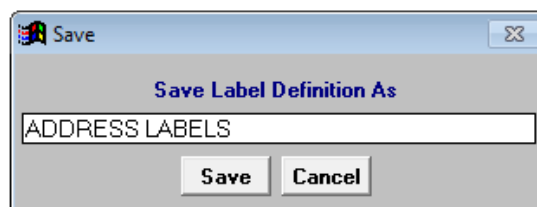
Create Label Format

To create a label format:

1. Select **Report | Report Definition** from the menu.
2. Select the blank value from the *Label Format* drop-down list in the Report Builder.
3. Enter a name for the label format.
4. Double-click a field name in the **Available Fields** list box to add it to the **Line 1** list box. Most labels have one field per line except address labels which usually have the city, state, and zip code reflected on the same line.
5. Select the appropriate radio button at the bottom of Label Format and repeat Step 4 to add a field to one or more of the remaining lines.
6. Click **F10 - Save** or press **F10**.



7. Click **Save**.



8. Click **OK** to exit Label Format.

Letter Format

Letter Format enables users to select fields to include in a mail merge. This feature is rarely used in PC LLL. Please contact Technical Support staff if you need assistance setting up a letter format.

Graph Format

Graph Format is not currently available. Most users create graphs and charts in Excel or other software using data exported from PC LLL.

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Section 7

Building & Viewing

Custom Reports

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PC LLL Report Builders

The PC LLL Report Builder and PC LLL Quick Report Builder are powerful tools for creating a wide-range of on-demand custom reports using HRS data available in the application. The Quick Report Builder is a simplified version of the Report Builder that automatically includes the most frequently used data elements for selection criteria, grouping definition, and list format in the report definition. It does not include options for creating labels and letters.

In the *Report Components Section* of the user manual, the three primary building blocks of reports (selection criteria, grouping definition, and format) are covered in detail.

In this section, we demonstrate how to:

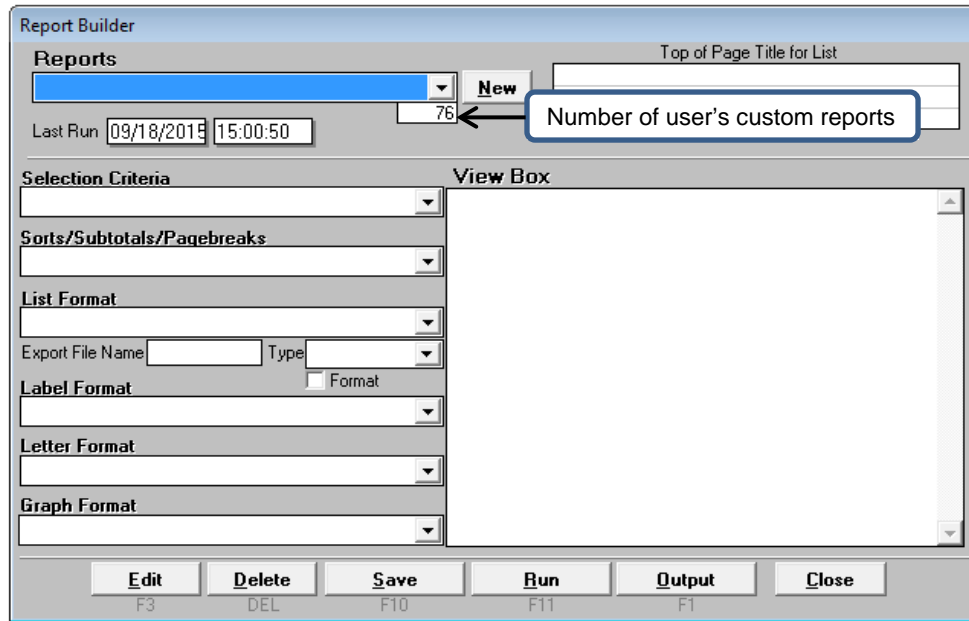
- Create a report using existing report components
- Create a report using new report components
- Edit an existing report
- Create a report using the Quick Report Builder
- Generate a report to create report output
- Preview, print, and export report output

Create Reports Using the Report Builder

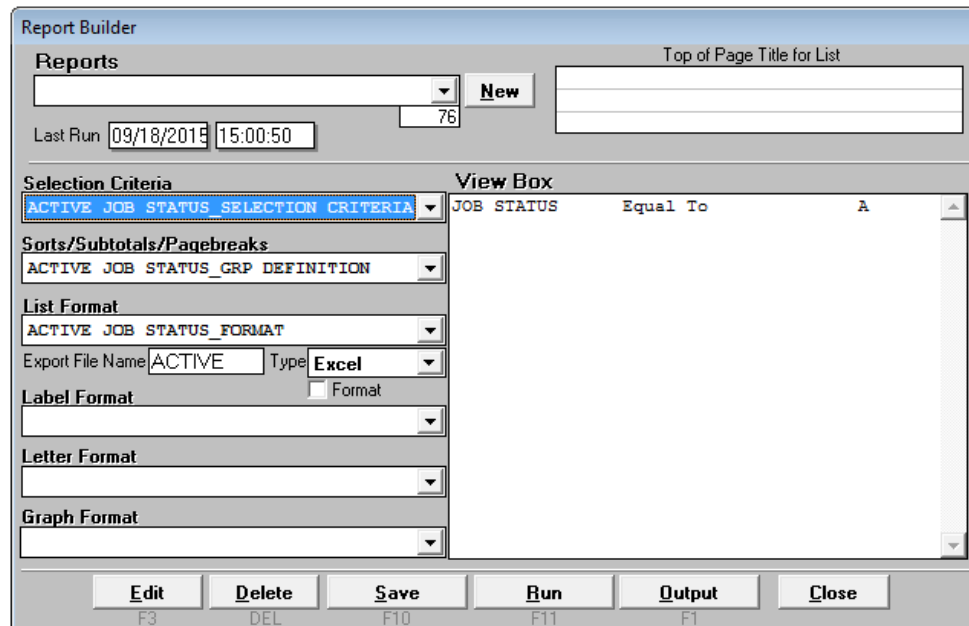
Create Report Using Existing Report Components

To create a report using existing report components:

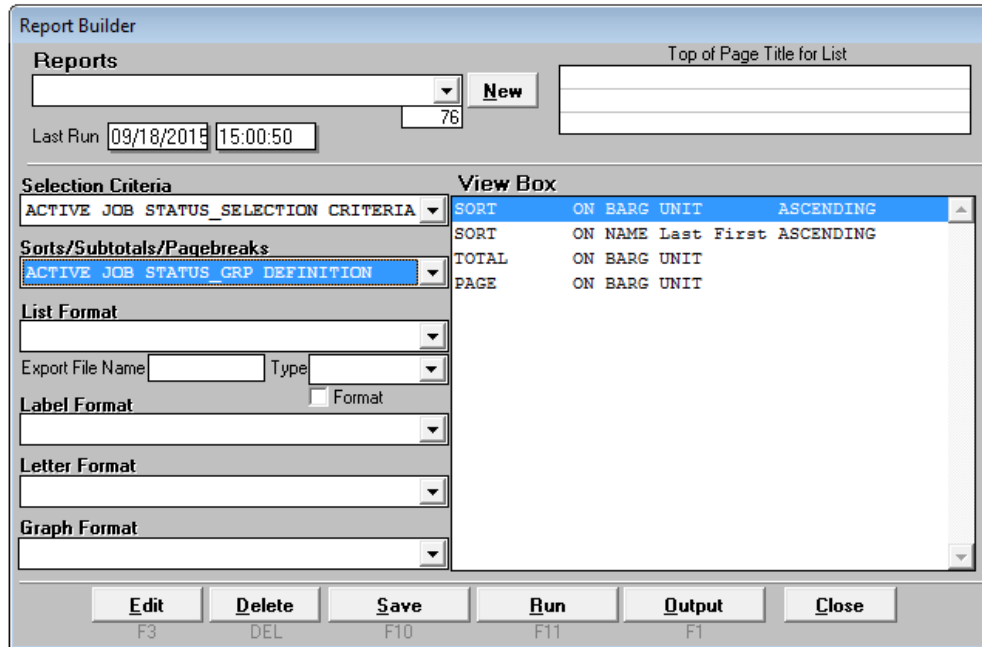
1. Select **Report | Report Definition** from the menu.



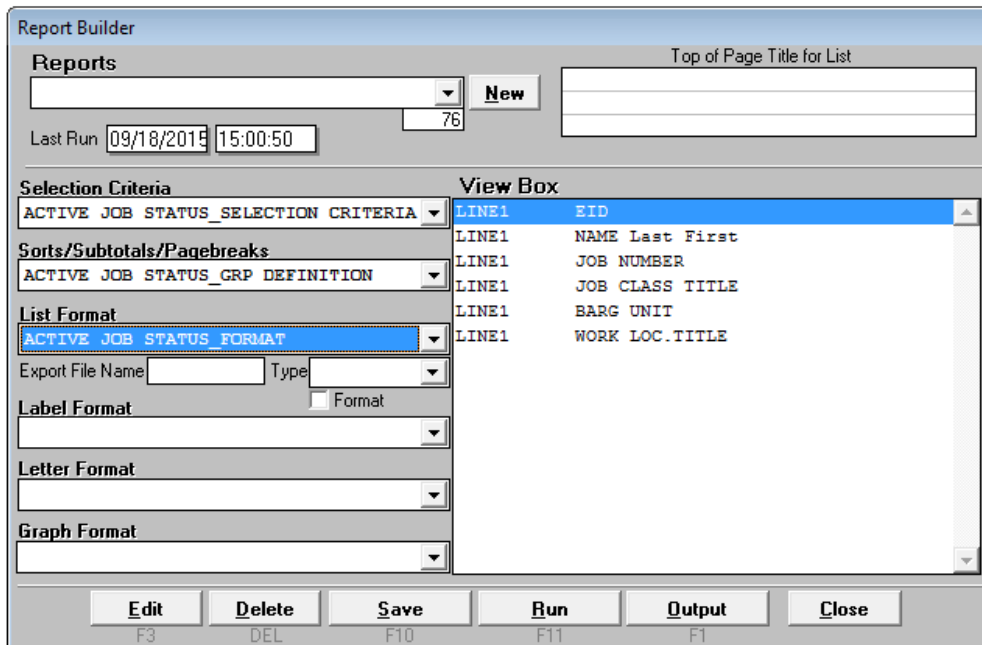
2. Select a selection criteria from the **Selection Criteria** drop-down list. **ACTIVE JOB STATUS_SELECTION CRITERIA** is selected for this illustration.



3. Select a grouping definition from the **Sort/Subtotals/Pagebreaks** drop-down list (grouping definition is the same as sort/subtotals/pagebreaks). **ACTIVE JOB STATUS_ GRP DEFINITION** is selected for this illustration.



4. Select a list format from the **List Format** drop-down list. **ACTIVE JOB STATUS_ FORMAT** is selected for this illustration.



5. Enter the **Export File Name** and select the **Type** from the drop-down list.
6. Enter a report title, message, or note in *Top of Page Title for List* as appropriate. It will appear in the upper left corner of the formatted report.
7. Click **Save** or press **F10**.
8. Enter the report name when prompted. PC LLL will suggest a name for the report based on the selection criteria name.
9. Click **Save**.
10. Click **Run** to generate report output.
11. Click **Output** to preview, print and/or export report.

Report Sample

SAMPLE SCHOOL DISTRICT						
ACTIVE CERTIFICATED & CLASSIFIED STAFF						
EID	LAST_FIRST test	JOB_NUM	JOB_TITLE	BARG_UNIT	WRK_LOC_NM	
HE3433626	ABBOTT, MARTHA B.	4	ADULT ED HOURLY	AE	HARDY ADULT CENTER	
BP5346801	ABBOTT, SUSAN B.	2	ADULT ED HOURLY	AE	HARDY ADULT CENTER	
VJ5267007	ALLRED, EMILY L.	2	ADULT ED HOURLY	AE	HARDY ADULT CENTER	

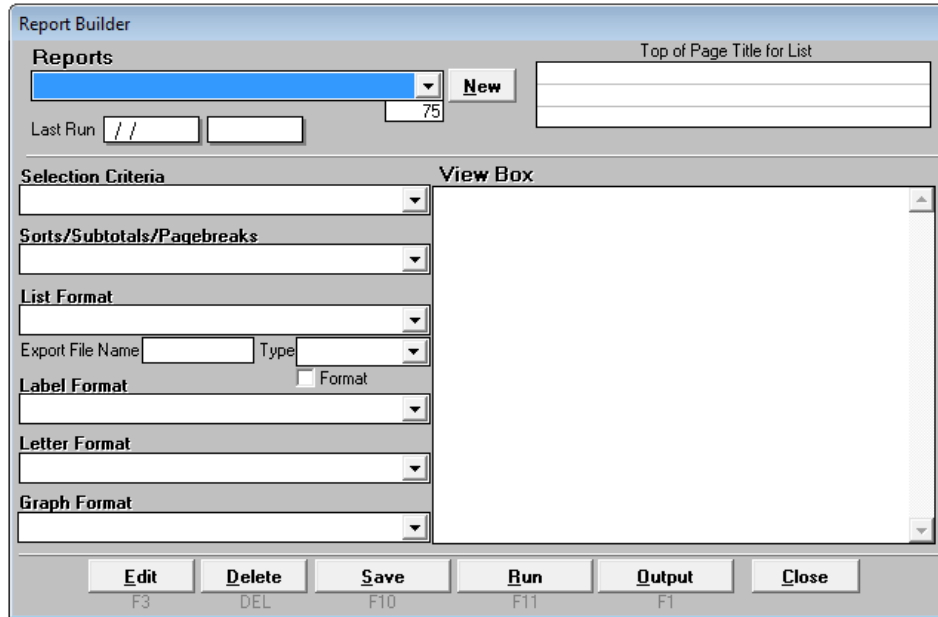


Users can enter titles or other information that will be displayed in the upper left corner on formatted reports. Titles, messages, and notes are not included in Excel or other export files.

Create Report Using New Report Components

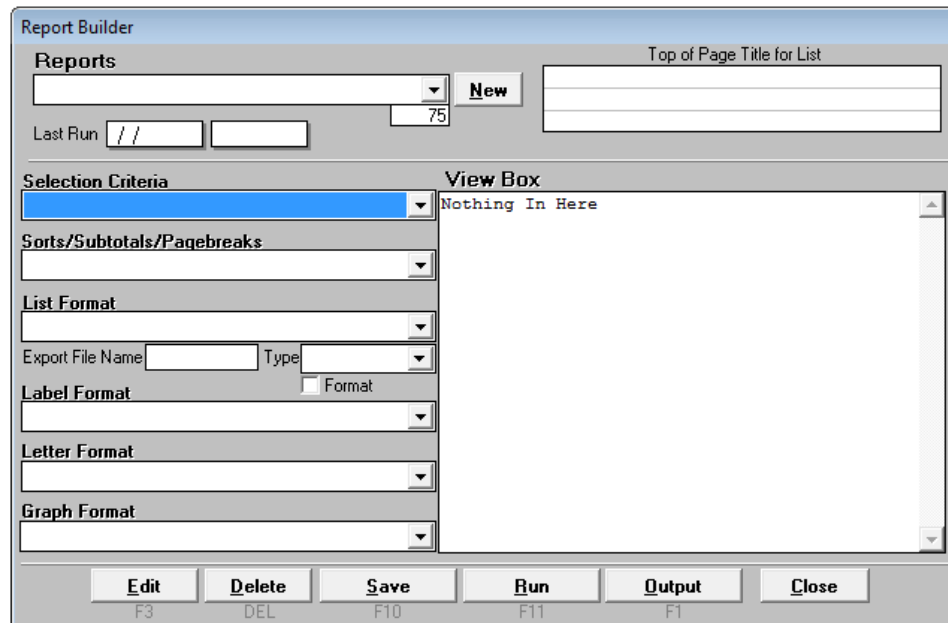
To create a report using new report components:

1. Select **Report I Report Definition** from the menu.



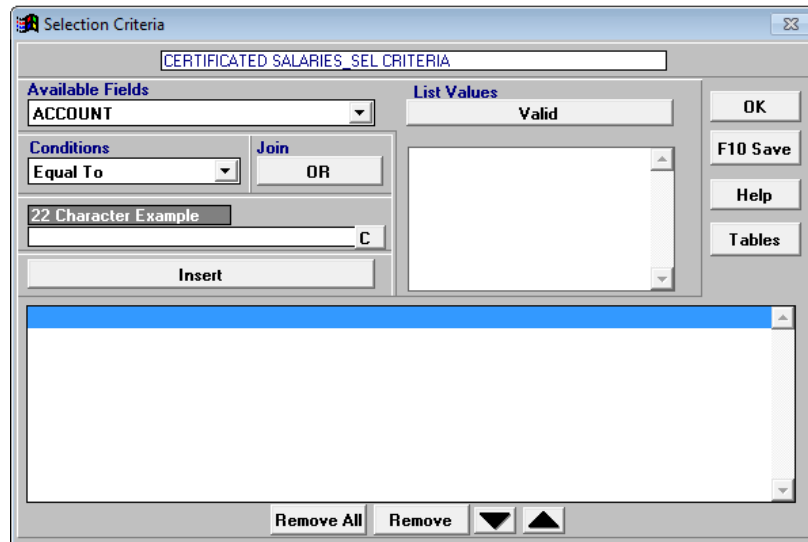
The screenshot shows the 'Report Builder' window. At the top, there's a 'Reports' dropdown menu which is currently highlighted in blue. To its right is a 'New' button and a '75' value. Below this is a 'Last Run' field with two empty boxes. On the right side, there's a 'Top of Page Title for List' field with three empty lines. The main area is divided into two sections: 'Selection Criteria' on the left and 'View Box' on the right. Under 'Selection Criteria', there are several dropdown menus: 'Selection Criteria' (empty), 'Sorts/Subtotals/Pagebreaks' (empty), 'List Format' (empty), 'Label Format' (empty), 'Letter Format' (empty), and 'Graph Format' (empty). There are also fields for 'Export File Name' and 'Type', and a 'Format' checkbox. The 'View Box' is currently empty. At the bottom, there are six buttons: 'Edit' (F3), 'Delete' (DEL), 'Save' (F10), 'Run' (F11), 'Output' (F1), and 'Close'.

2. Select the blank value from the **Selection Criteria** drop-down list.
3. Click **Edit** or double-click the *Nothing in Here* line in the View Box to go to Selection Criteria.

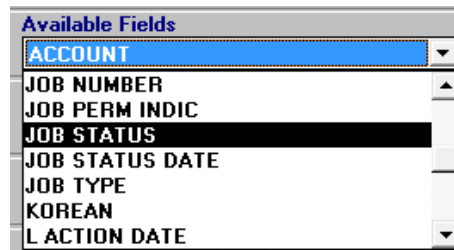


This screenshot shows the 'Report Builder' window after the user has selected the blank value in the 'Selection Criteria' dropdown. The 'Selection Criteria' dropdown is now highlighted in blue. The 'View Box' now contains the text 'Nothing In Here'. All other elements, including the 'Reports' dropdown, 'Sorts/Subtotals/Pagebreaks', 'List Format', 'Label Format', 'Letter Format', 'Graph Format', 'Export File Name', 'Type', 'Format' checkbox, and the bottom buttons ('Edit', 'Delete', 'Save', 'Run', 'Output', 'Close'), remain the same as in the previous screenshot.

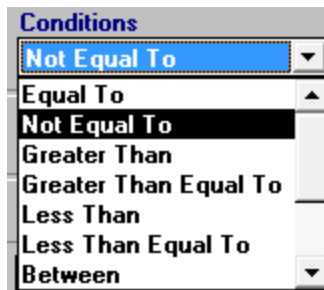
4. Enter a name for the selection criteria. **CERTIFICATED SALARIES_SEL CRITERIA** is entered for this illustration.



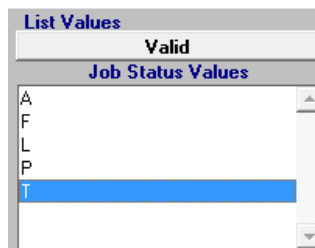
5. Select a field from the **Available Fields** drop-down list.



6. Select a comparison operator from the **Conditions** drop-down list.



7. Click **Valid** to display available values.



- Double-click the value in the **Valid** list box. If the value is not listed, type it in the **Example** box.

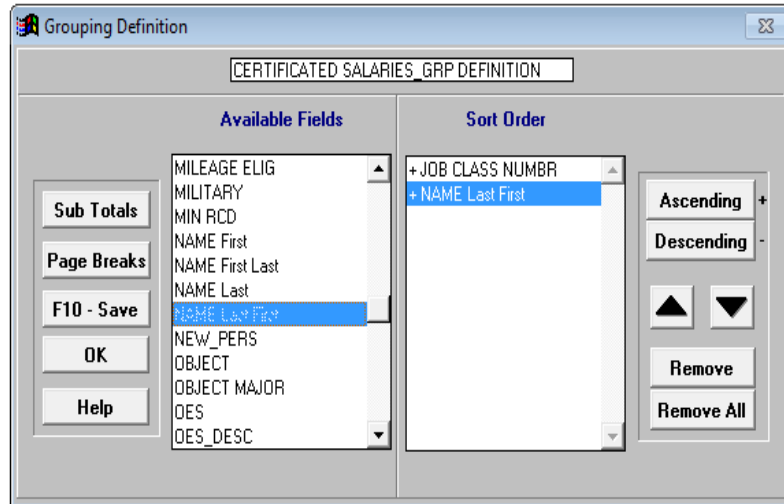
- Click **Insert** to add the condition to the selection criteria.

- Repeat steps 5 – 9 to add additional available fields or conditions.
- Click **F10 - Save** when finished.
- Click **Save**.
- Click **OK** or press **Esc** to return to the Report Builder.

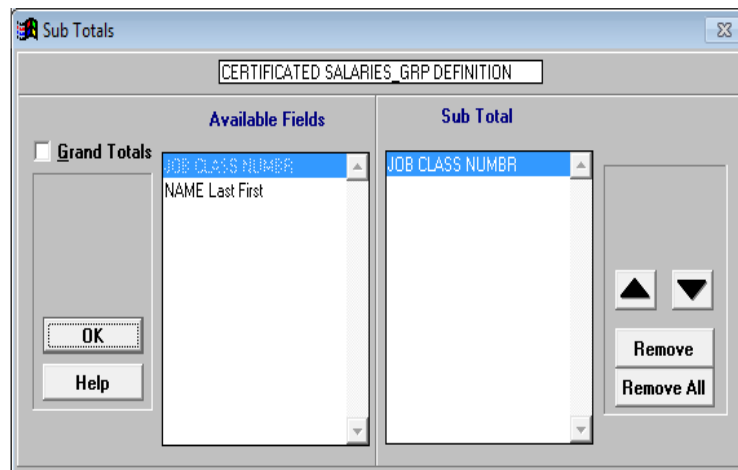
Field Name	Condition	Value
JOB STATUS	Not Equal To	T
PRIME JOB	Equal To	Yes
JOB TYPE	Equal To	C
ANNUAL SALARY	Greater Than	50000

- Select the blank value from the **Sorts/Subtotals/Pagebreaks** drop-down list.
- Click **Edit** or double-click the *Nothing in Here* line in the View Box to go to Grouping Definition.

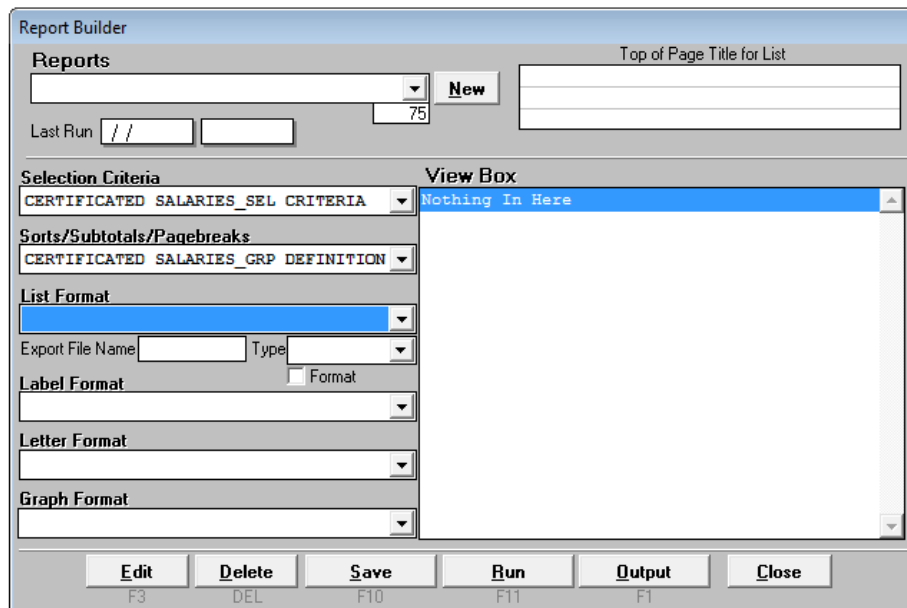
16. Enter a name for the grouping definition. **CERTIFICATED SALARIES_GRP DEFINITION** is entered for this illustration.
17. Double-click a field name in the **Available Fields** list box to add it to the **Sort Order** list box.
18. Repeat Step 17 to include additional sort fields.
19. Click **Sub Totals** on Grouping Definition to include report subtotals.



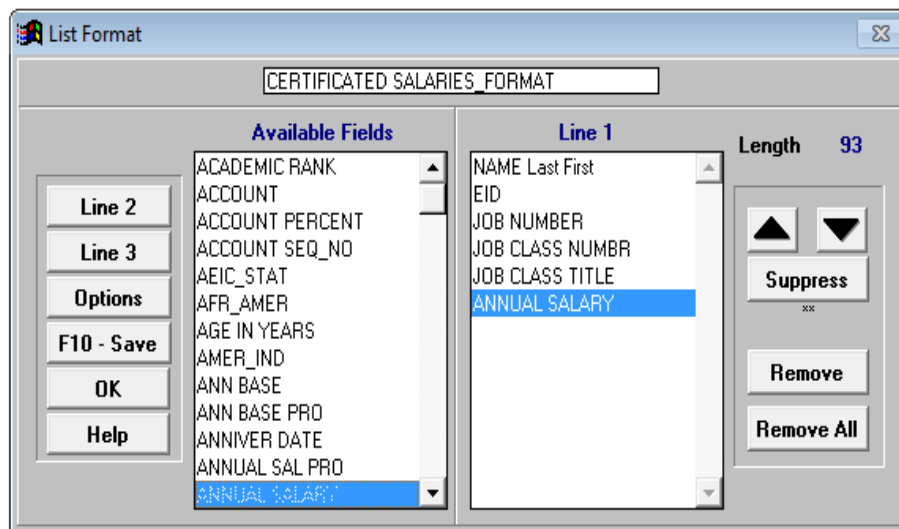
20. Double-click a field in the **Available Fields** list box to add it to the **Sub Total** list box.
21. Repeat Step 20 to include additional subtotals.
22. Click **OK** when finished to return to Grouping Definition.
23. Click **F10 – Save**.
24. Click **Save**.
25. Click **OK** to return to the Report Builder.



26. Select the blank value from the **List Format** drop-down list in the Report Builder.
27. Click **Edit** or double-click the *Nothing in Here* line in the View Box to go to List Format.



28. Enter a name for the list format. **CERTIFICATED SALARIES_FORMAT** is entered for this illustration.
29. Double-click a field name in the **Available Fields** list box to add it to the **Line 1** list box.
30. Repeat Step 29 to include additional fields.
31. Click **Line 2** and/or **Line 3** as appropriate to add additional lines of field data.
32. Click **F10 – Save**.
33. Click **Save**.
34. Click **OK** or press **Esc** to return to the Report Builder.



35. Enter the export file name and select the file type from the drop-down list.
36. Click **Save**.
37. Enter a name for the report. **CERTIFICATED SALARIES REPORT** is entered for this illustration.
38. Click **Save**.

Report Builder

Reports

CERTIFICATED SALARIES REPORT [New] 76

Last Run //

Top of Page Title for List

Selection Criteria

CERTIFICATED SALARIES_SEL CRITERIA

Sorts/Subtotals/Pagebreaks

CERTIFICATED SALARIES_GRP DEFINITION

List Format

CERTIFICATED SALARIES_FORMAT

Export File Name SALARIES Type Excel

Label Format

Letter Format

Graph Format

View Box

Edit (F3) Delete (DEL) Save (F10) Run (F11) Output (F1) Close

39. Click **Run**.
40. Click **Output** to preview, print, and/or export report output.

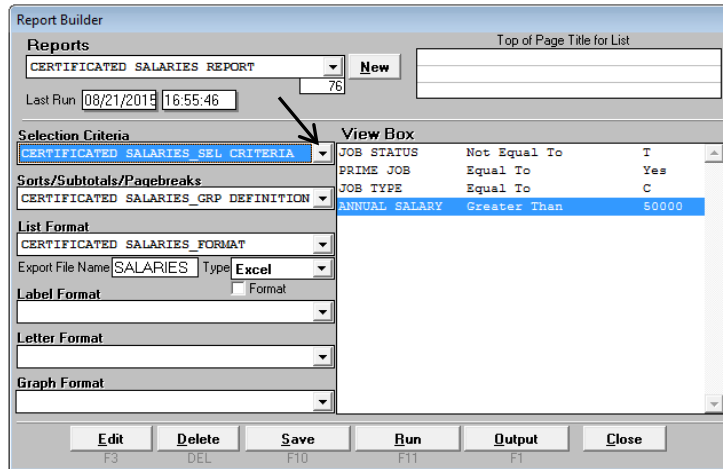


There is no set naming convention for reports and report components. Some users prefer to use names such as “Sum by Barg Unit” to describe the report component. See the Report Builder illustration on Page VII-15.

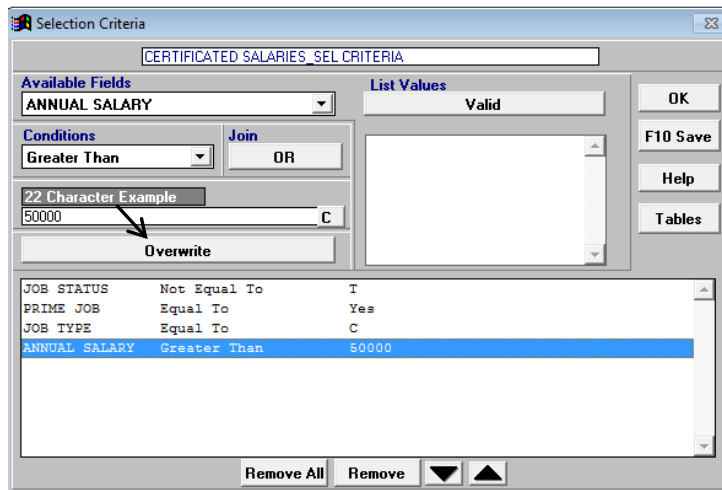
Edit an Existing Custom Report

To edit an existing custom report:

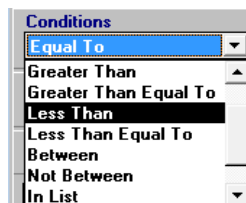
1. Select **Report I Report Definition** from the menu.
2. Select the report to edit from the **Reports** drop-down box. **CERTIFICATED SALARIES REPORT** is selected for this illustration.
3. Place the cursor in the **Selection Criteria** drop-down box to edit the selection criteria. Use the same process to edit the other report components.
4. Click **Edit** or double-click a line in the View Box to go to Selection Criteria.



5. Double-click the condition to edit. **ANNUAL SALARY** is selected for this illustration. **Insert** will change to **Overwrite**.



6. Select a comparison operator from the **Conditions** drop-down list as appropriate.



7. Click **Valid** to display available values.
8. Double-click the value in the **Valid** list box. If the value is not listed, type it in the **Example** box. Forty thousand (**40000**) is entered for this illustration.

A small dialog box titled "Numeric Example" with a text input field containing the number "40000" and a "C" button to its right.

9. Click **Overwrite** to change the annual salary condition.

JOB STATUS	Not Equal To	T
PRIME JOB	Equal To	Yes
JOB TYPE	Equal To	C
ANNUAL SALARY	Less Than	40000

10. Click **F10 – Save** when finished.
11. Click **Save** if using the same selection criteria name. Otherwise, enter a new name and click **Save**.
12. Press “Y” to overwrite the existing selection criteria.
13. Click **OK** or press **Esc** to return to the Report Builder.

The "Selection Criteria" dialog box shows the configuration for "CERTIFICATED SALARIES_SEL CRITERIA". It includes an "Available Fields" list with "ANNUAL SALARY" selected, a "Conditions" dropdown set to "Less Than", and a "List Values" list with "Valid" selected. The "List Values" list shows "Annual Salary Values" with a list of numbers including 0,000, 10007,760, 10011,820, 10035,900, 10036,000, 10058,940, and 1007,496. A "Numeric Example" field is empty. The bottom of the dialog shows a table with the same data as the previous screenshot, and buttons for "Remove All", "Remove", and navigation arrows.

View an Existing Custom Report

To view an existing custom report:

1. Select **Report I Report Definition** from the menu.
2. Select the report to view from the **Reports** drop-down menu to display report components.
3. Place the cursor in the selection criteria, grouping definition, or format detail drop-down box to display report component elements in the View Box. List Format detail is displayed in the View Box in the illustration below.

The screenshot shows the 'Report Builder' window. At the top, there's a 'Reports' section with a dropdown menu showing 'JOB & PAY CALENDAR COMPARISON' and a 'New' button. Below this, 'Last Run' is displayed as '09/18/2014 15:17:05'. To the right, there's a text box labeled 'Top of Page Title for List'. The main area is split into 'Selection Criteria' and 'View Box'. 'Selection Criteria' has dropdowns for 'ALL ACTIVE MONTHLY EMPLOYEES', 'Sorts/Subtotals/Pagebreaks' (set to 'SORT BY NAME'), 'List Format' (set to 'CALENDARS'), 'Label Format', 'Letter Format', and 'Graph Format'. The 'View Box' displays a list of components: 'LINE1 POSITION NUMB', 'LINE1 JOB CLASS TITLE', 'LINE1 NAME Last First', 'LINE1 JOB NUMBER', 'LINE1 PAY MONTHS', and 'LINE1 WORK CALENDAR'. At the bottom, there are buttons for 'Edit' (F3), 'Delete' (DEL), 'Save' (F10), 'Run' (F11), 'Output' (F1), and 'Close'.



To run a report, a selection criteria, a grouping definition, and either a list, label, or letter format must be selected. After clicking **Run** to generate the report, the *Last Run* date and time appear in the upper left corner of the Report Builder. *Last Run* refers to the most recent date and time the report was generated, not the data “as of” date.

Create Output Files Using the Report Builder

Create a Formatted Report

To create a formatted report:

1. Select **Report I Report Definition** from the menu.
2. Select a report from the **Reports** drop-down box in the Report Builder.
3. Click **Run**.
4. Click **Output** to preview or print report output.

Report Builder

Reports: CERTIFICATED SALARIES REPORT (New) 76

Last Run: 08/21/2015 17:20:02

Top of Page Title for List

Selection Criteria: CERTIFICATED SALARIES_SEL CRITERIA

Sorts/Subtotals/Pagebreaks: CERTIFICATED SALARIES_GRP DEFINITION

List Format: CERTIFICATED SALARIES_FORMAT

Export File Name: SALARIES Type: Excel

Label Format: Format

Letter Format

Graph Format

Buttons: Edit (F3), Delete (DEL), Save (F10), Run (F11), Output (F1), Close

5. Select the radio button in front of *List*.
6. Click **Continue**.

Output

List

List Export

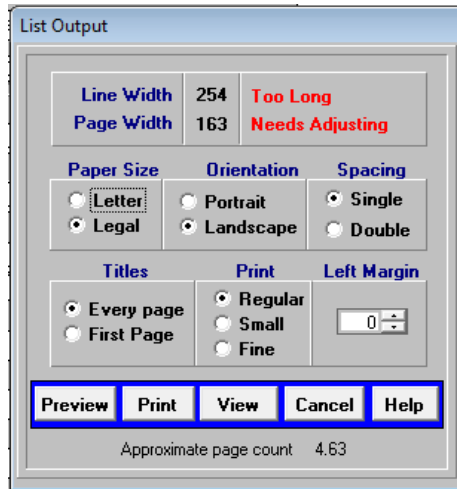
Labels

Letters

Graph

Buttons: Cancel, Continue

- Click **Preview** or **Print** from the List Output to view the report. If the line width exceeds the page width, adjust the **Paper Size**, **Orientation**, and/or **Print**. Refer to **List Output Features** on Page VII-20 for more information on formatting report output.



- Click **Preview** to review the report in Print Preview. The complete report can be sent to the default printer by clicking the printer icon on the toolbar. Return to the List Output to print selected pages of the report or print to another printer.



Report Sample

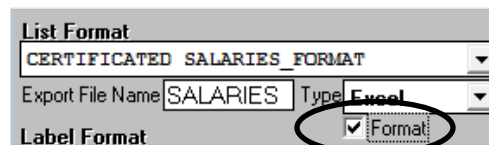
SAMPLE SCHOOL DISTRICT						Date Ran 12/03/15
						Time Ran 09:21:41
						Data as of 09/23/14
LAST_FIRST test	EID	JOB_NUM	JOB_CLASS	JOB_TITLE	ANNUAL SALARY	
GLOVER, CHARLIE L.	HP3901880	3	080020	LONG TERM SUB DTD	25200.000	
JOB_CLASS (080020) 1 Record(s)					25200.00	
ABRAMS, TINA B.	VK7099864	4	080100	TEACHERS HOURLY	41343.120	
BARRETT, GLORIA A.	EB7605532	1	080100	TEACHERS HOURLY	34236.000	
CONNOLLY, VIRGINIA O.	PE9854838	4	080100	TEACHERS HOURLY	34616.400	
DENTON, THOMAS E.	GZ1572548	7	080100	TEACHERS HOURLY	5706.000	
DICKERSON, TONI I.	SP3464647	1	080100	TEACHERS HOURLY	36320.400	
EDWARDS, SIDNEY D.	JF0186778	2	080100	TEACHERS HOURLY	38962.560	
FREDERICK, ELAINE R.	HM3859393	1	080100	TEACHERS HOURLY	38534.400	
HENSON, PAIGE E.	CP5430794	4	080100	TEACHERS HOURLY	37411.200	
LIM, ANNIE I.	TF9571656	6	080100	TEACHERS HOURLY	39690.000	
MCCARTHY, BERNARD C.	EF1215455	1	080100	TEACHERS HOURLY	36320.400	
MCLEAN, KARL C.	BM6536660	1	080100	TEACHERS HOURLY	38534.400	
MCNEILL, TIMOTHY C.	BE5564090	3	080100	TEACHERS HOURLY	34616.400	
PERKINS, ROBIN E.	WA1720966	1	080100	TEACHERS HOURLY	40131.000	
RAMSEY, MARIE A.	WR8947622	4	080100	TEACHERS HOURLY	34236.000	
ROY, KENT O.	CG2764101	1	080100	TEACHERS HOURLY	34236.000	
TERRELL, JUSTIN E.	MP1109052	1	080100	TEACHERS HOURLY	39690.000	
WALL, MARIANNE A.	HN7543494	4	080100	TEACHERS HOURLY	37411.200	
JOB_CLASS (080100) 17 Record(s)					601995.48	

- Press **Esc** to return to List Output.
- Click **Cancel** to return to the Report Builder.

Create an Export File

To create an export file:

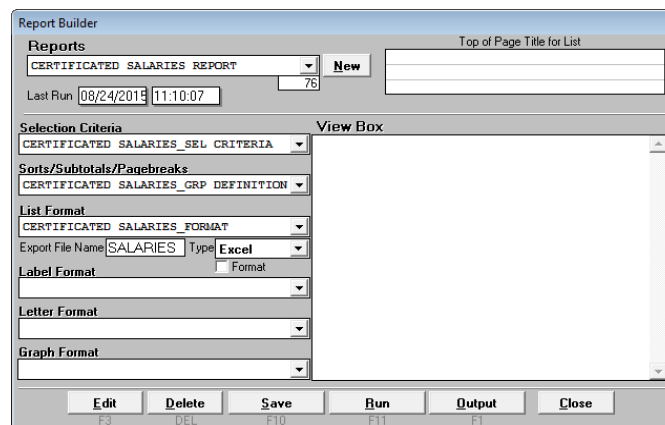
1. Select **Report I Report Definition** from the menu.
2. Select a report from the **Reports** drop-down box in the Report Builder.
3. Enter the **Export File Name** in the field provided. Do not include spaces or symbols as part of the file name.
4. Select the file format from the **Type** drop-down list.
5. Check the optional **Format** box to display text in the proper case. Otherwise, all text is in capital letters. The case for acronyms or abbreviations may not reflect accurately if the Format option is selected.
6. Click **Run**. The export file automatically saves to the designated export path. Refer to **Verify System Set Up and User Paths** in *Section 2 – Getting Started* on Page II-6 to verify path for export file format.



List Format
CERTIFICATED SALARIES_FORMAT
Export File Name SALARIES Type Excel
Label Format Format



Select Database (DBF) as the report output type for spreadsheets exceeding 16,383 lines. Select Excel (XLS) for spreadsheets with 16,383 or fewer lines. Refer to the **Appendix** on Page A-19 for instructions on opening DBF file(s) with Excel.



Report Builder
Reports: CERTIFICATED SALARIES REPORT (New) 76
Last Run: 08/24/2013 11:10:07
Top of Page Title for List:
Selection Criteria: CERTIFICATED SALARIES_SEL CRITERIA
Sorts/Subtotals/Pagebreaks: CERTIFICATED SALARIES_GRP DEFINITION
List Format: CERTIFICATED SALARIES_FORMAT
Export File Name: SALARIES Type: Excel
Label Format: Format
Letter Format:
Graph Format:
Edit (F3) Delete (DEL) Save (F10) Run (F11) Output (F1) Close

See sample export file on next page.

Report Sample in Excel Format

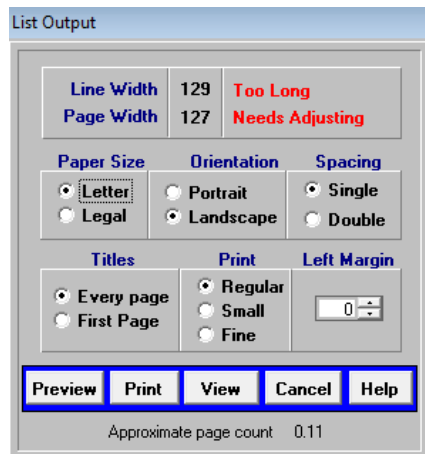
	A	B	C	D	E	F
1	name	eid	job_num	job_class	job_title	ann_sal
2	GLOVER, CHARLIE L.	HP3901880	3	080020	LONG TERM SUB DTD	25200
3	BARRETT, GLORIA A.	EB7605532	1	080100	TEACHERS HOURLY	34236
4	CONNOLLY, VIRGINIA O.	PE9854838	4	080100	TEACHERS HOURLY	34616.4
5	DENTON, THOMAS E.	GZ1572548	7	080100	TEACHERS HOURLY	5706
6	DICKERSON, TONI I.	SP3464647	1	080100	TEACHERS HOURLY	36320.4
7	EDWARDS, SIDNEY D.	JF0186778	2	080100	TEACHERS HOURLY	38962.56
8	FREDERICK, ELAINE R.	HM3859393	1	080100	TEACHERS HOURLY	38534.4
9	HENSON, PAIGE E.	CP5430794	4	080100	TEACHERS HOURLY	37411.2
10	LIM, ANNIE I.	TF9571656	6	080100	TEACHERS HOURLY	39690
11	MCCARTHY, BERNARD C.	EF1215455	1	080100	TEACHERS HOURLY	36320.4

Create Label Output

Refer to *Section 6 – Report Components* on Page VI-20 for creating label output files.

List Output Features

List Output provides features to adjust the report format before previewing or printing it. Output cannot be viewed or printed if the line or page width requires adjustment. These features can be used to create a PDF file, change the paper size, report orientation, spacing, titles, print size and/or left margin.



Below is an overview of List Output features.

Features	Description
<i>Line Width</i>	Number of characters reflected on a report line. The line width must be less than or equal to the page width.
<i>Page Width</i>	Current maximum available page width based on the output settings. Change the paper size, orientation, and/or print size to adjust the page width.
<i>Paper Size</i>	Letter (standard 8.5" by 11") or legal (standard 8.5" by 14")
<i>Orientation</i>	Portrait for the lines to span the short side of the page, allowing for more lines per page or landscape for the lines to span the long side of the page, allowing for greater line width
<i>Spacing</i>	Single or double
<i>Titles</i>	Print on every page or only on the first page of the report
<i>Print</i>	<i>Regular</i> (10 point font) <i>Small</i> (9 point font) or <i>Fine</i> (8 point font)
<i>Left Margin</i>	Adjust left margin
The status message at the bottom of the window indicates an estimated page count which may change as the report format is adjusted.	

PC LLL Quick Report Builder

The Quick Report Builder includes the same report fields and most of the same functionality as the Report Builder. As the name implies, the Quick Report Builder enables users to quickly set up and run custom reports.

The Quick Report Builder differs from the regular Report Builder in the following ways:

- The Quick Report Builder automatically populates the selection criteria, grouping definition, and format report components with data frequently used to create custom reports.
- The Quick Report Builder does not include label and letter format options.

To build a new custom report using the Quick Report Builder:

1. Select **Report | Quick Report** from the main menu.
2. Click **New**.
3. Enter the report name.
4. Click **Save**. The *Selection Criteria*, *Sorts/Subtotals/Pagebreaks*, and *List Format* fields are automatically populated with data fields commonly used to create custom reports. Users can edit report components as desired.

Quick Report Builder

Reports

QUICK REPORT SAMPLE New

Last Run // / / 9

Top of Page Title for List

Selection Criteria

PRIME JOB	Equal To	YES
EMPLOYEE STATUS	Equal To	A

Sorts/Subtotals/Pagebreaks

SORT ON NAME Last First ASCENDING

List Format

LINE1	NAME Last First
LINE1	JOB CLASS TITLE
LINE1	WORK LOC.TITLE
LINE1	SALARY RATE

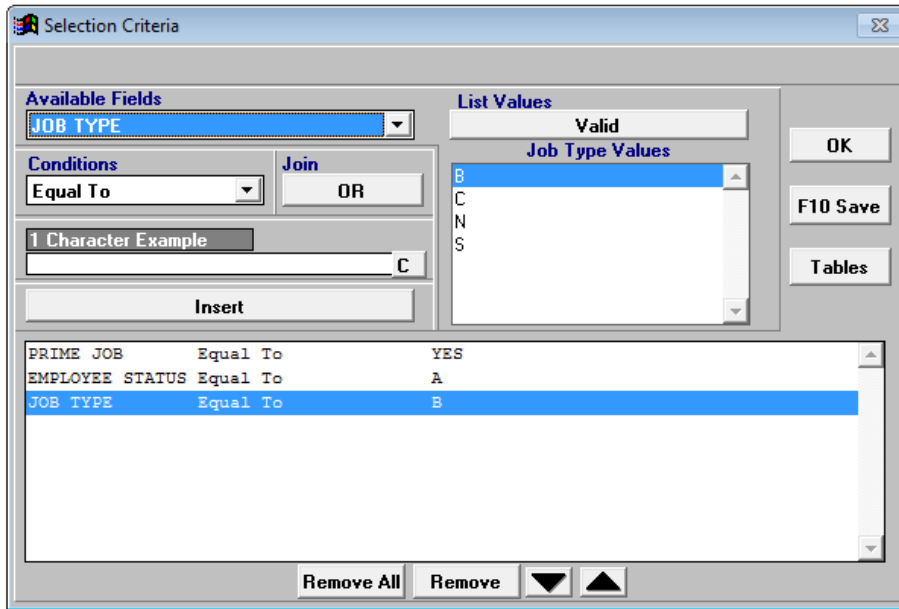
Export File Name

Type

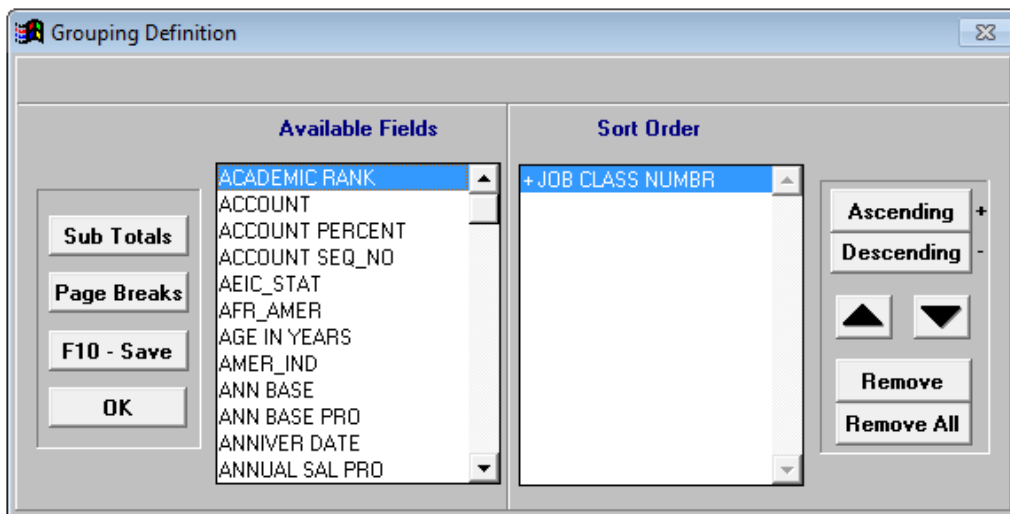
Format

Edit Delete Save Copy Run Output Close

- Place the cursor in the *Selection Criteria* field and click **Edit** or double-click to update selection criteria. For this example the *Job Type* field was added.
- Click **Save**.

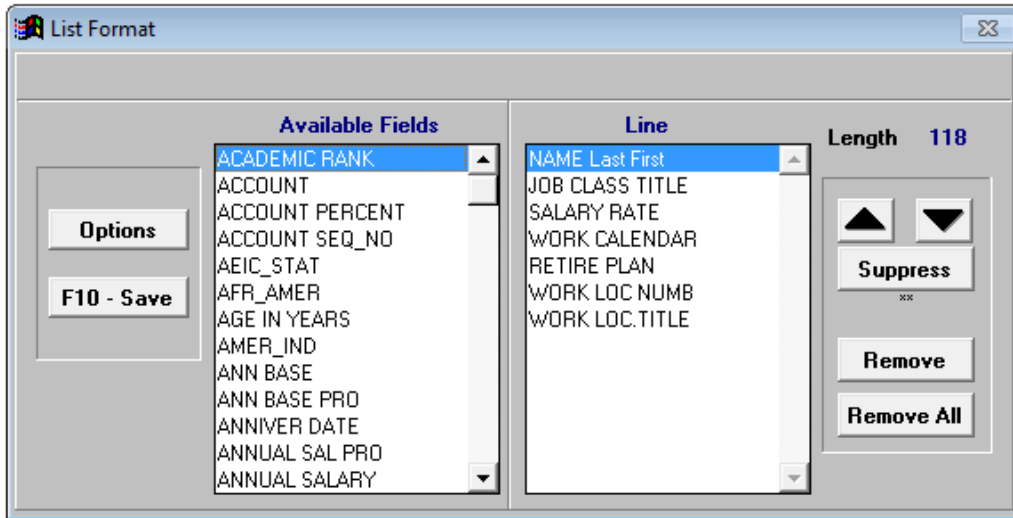


- Click **OK** to return to the Quick Report Builder window.
- Place the cursor in the *Sorts/Subtotals/Pagebreaks* field and click **Edit** to update the grouping definition. For this example the *Name Last First* field was replaced with the *Job Class Number* field.
- Click **Save**.

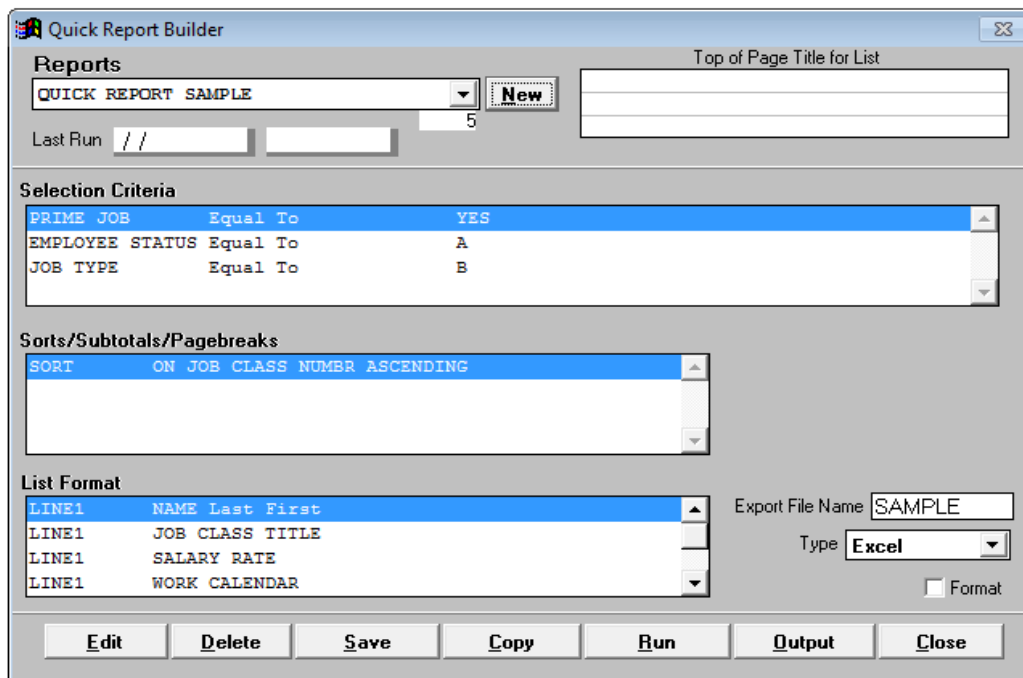


- Click **OK** to return to the Quick Report Builder window.

11. Place the cursor in the *List Format* field and click **Edit** to update the report format. For this example the *Work Calendar*, *Retirement Plan*, and *Work Loc Numb* fields were added to the format. The *Work Loc Title* field was moved to the bottom of the list.
12. Click **Save**.



13. Click **OK** to return to the Quick Report Builder window.
14. Enter an export file name and select the file type to produce an export file. Below is a screen shot of the modified report definition.



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Section 8

Report Utilities

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Report Utilities

The three report utilities listed below are very useful for report and output management. These utilities are accessed by selecting **Report | Report Utilities**.

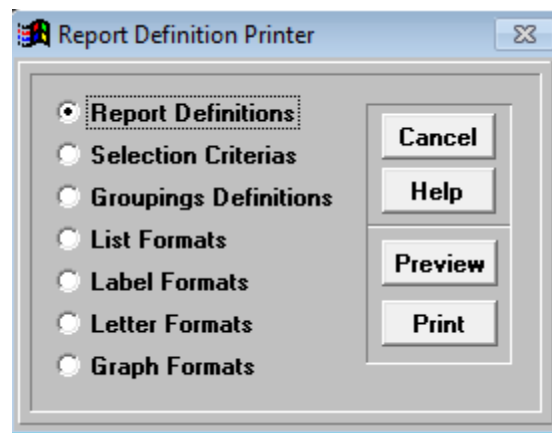
- Report Lister
- Change Column Names
- Report Synchronizer

Report Lister

The Report Lister is a repository of a user's custom reports, selection criteria, grouping definitions, and formats. It can be used to view or print report definitions and report component detail stored within the application on the user's computer. The Report Lister is a good tool for organizing PC LLL reports and components.

To print or view libraries:

1. Select **Report | Report Utilities | Report Lister**.
2. Click the radio button for the desired library.
3. Click **Preview** or **Print**
4. Click **Cancel** when finished.



Change Column Names

Change the field name reflected in the column header on formatted reports. The original database field name and the header name in export files will not change.

To change a column header name:

1. Select **Report | Report Utilities | Change Column Names** from the menu.
2. Identify the field name to change in the **User name** column.
3. Place the cursor in the corresponding field of the **Format column name** and overwrite the existing name.

	User name	Format column name
	ACADEMIC RANK	ACAD_RANK
	ACCOUNT	ACCOUNT NUMBER
	ACCOUNT PERCENT	PERCENT
	ACCOUNT SEQ_NO	ACCT_SEQ #
	AEIC_STAT	AEIC_STAT
	AFR_AMER	AFR_AMER
	AGE IN YEARS	AGE
	AMER_IND	AMER_IND
	ANN BASE	ANN_BASE
	ANN BASE PRO	ANN_B_PRO
	ANNIVER DATE	ANNIVER_DT

4. Press **Enter** on the keyboard to save the change.
5. Repeat steps 2 through 4 to change additional column names.
6. Press **ESC** or click **X** in the upper right corner when finished.



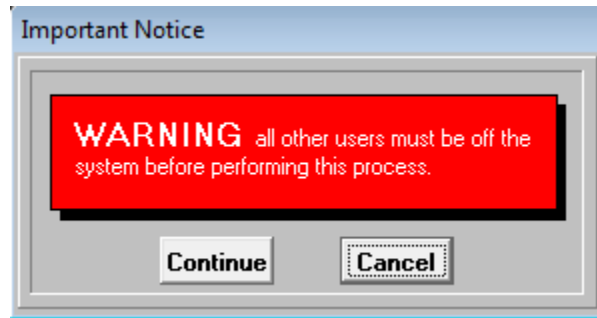
Column name changes are temporary. Modified column names will revert to the system default name whenever the system is updated, which is daily for most users.

Report Synchronizer

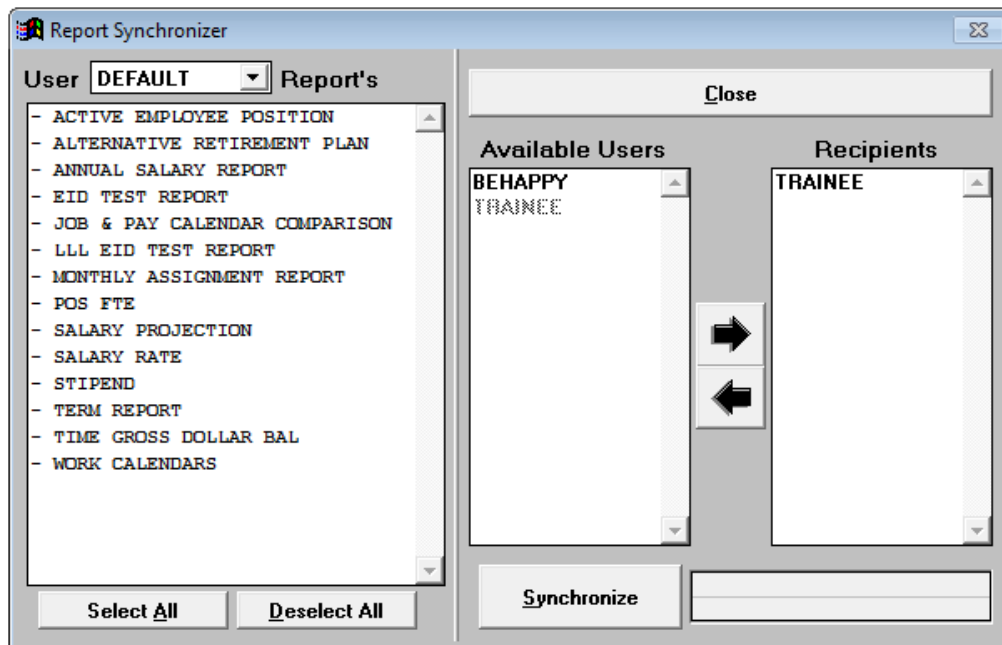
The Report Synchronizer enables users to share their custom reports with other users.

To share reports:

1. Select **Report | Report Utilities | Report Synchronizer | Reports** or **Quick Report** from the menu.
2. Make sure all other users are logged out of PC LLL.



3. Click **Continue**.
4. Double-click the name(s) of the report to share or click **Select All** to share all reports listed.
 - A minus sign (-) appears in front of reports that will not be shared.
 - A plus sign (+) appears in front of reports that will be shared.



5. Select the user(s) that will get a copy of the report.
 - **To add recipients:** Select the User ID from the **Available Users** drop-down box and click the right arrow or double-click the User ID.
 - **To remove recipients:** Select the User ID from the **Recipients** drop-down box and click the left arrow or double-click the User ID.

6. Click **Synchronize** when finished.
7. Click **Yes**.



8. Click **Close** when synchronization is complete.



Click **Select All** to include all the reports listed. Click **Deselect All** to exclude all the reports listed.

Appendix

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Employee Database (EDB)									
Personnel Action Data Screen (003)									
Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
EID	EID	Employee's identification number	Bulletin 343, 06/01/2010	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	9
EID_4	NA	Last four digits of EID	-	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	4
NAME Last First	Name	Employee's last name, first name	III-19	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	30
NAME First Last	NA	Employee's first name last name	-	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	30
NAME First	NA	Employee's first name	-	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	30
NAME Last	NA	Employee's last name	III-19	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	30
PRIME_JOB	Primary Job	Prime job number	III-20	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	1
EMP_DESC	Employee Description	Employee Description	III-20	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	20
EMPLOYEE TYPE	Employee Type	Employee type	III-20	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	1
PERM INDICATOR	Permanency Indicator	Permanency indicator code	III-20	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	1
PERM_IND.TITLE	Permanency indicator description	Description of permanency indicator code	II-84	C	PERM	Personnel Action Data Screen (003)	N	Y	24
NEW_PERS	Pension Reform Status	Pension reform status	Bulletin 3508, 02/07/2013	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	1
PAY LOCATION	Pay Location	Pay location code	III-20	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	3
PAY_LOC TITLE	Pay location description	Pay location description	II-83	C	PAY_LOC	Personnel Action Data Screen (003)	N	Y	25
ORIG HIRE DATE	Original Hire	Original hire date	III-20	D	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	8
PROB. SERVICE	1st Prob Service	First probationary service date	III-20	D	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	8
SENIOR DATE	Seniority Date	Seniority date	III-20	D	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	8
F_WORK_DT	1st Work Date	First work date	III-21	D	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	8
LAST ACTION	Last Actions	Last action codes	III-21	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	8
L ACTION DATE	Last Action Date	Last action effective date	III-21	D	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	8
MIN RCD	Minimum Record	Minimum data record	III-21	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	1
EMPLOYEE STATUS	Employment Status	Employment status	III-21	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	1
STATUS EFF DATE	Status Date	Date of status effective date	III-21	D	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	8
EMPLOYEE TERM	NA	Termination code	III-21	C	EMPLOYEE	Personnel Action Data Screen (003)	Y	Y	2
Job Assignment Screen (004)									
JOB NUMBER	Job	Job number	III-25	C	JOB	Job Assignment Screen (004)	Y	Y	1
POSITION NUMB	Position	Position number	III-25	C	JOB	Job Assignment Screen (004)	Y	Y	6
POS_1	NA	First digit of position number	-	C	JOB	Job Assignment Screen (004)	Y	Y	1
POS_2	NA	Second digit of position number	-	C	JOB	Job Assignment Screen (004)	Y	Y	1
POS_3	NA	Third digit of position number	-	C	JOB	Job Assignment Screen (004)	Y	Y	1
POS_4	NA	Fourth digit of position number	-	C	JOB	Job Assignment Screen (004)	Y	Y	1
POS_5	NA	Fifth digit of position number	-	C	JOB	Job Assignment Screen (004)	Y	Y	1
POS_6	NA	Sixth digit of position number	-	C	JOB	Job Assignment Screen (004)	Y	Y	1
BOARD APPR DATE	Board Approval	Board approval date	III-25	D	JOB	Job Assignment Screen (004)	Y	Y	8
CREDENTIAL	Credential	Credential code	III-25	C	JOB	Job Assignment Screen (004)	Y	Y	5
CREDENTIAL EXP	Cred Exp Date	Credential expiration date	III-26	D	JOB	Job Assignment Screen (004)	Y	Y	8
ACADEMIC RANK	Acad Rank	Academic rank	III-26	C	JOB_TBL	Job Assignment Screen (004)	N	Y	1
JOB CLASS NUMBR	Job Class	Job class number	III-26	C	JOB	Job Assignment Screen (004)	Y	Y	6
JOB CLASS TITLE	Job Class	Job class title	II-20	C	JOB_TBL	Job Assignment Screen (004)	N	Y	25
JOB TYPE	Job Type	Job type	II-20	C	JOB_TBL	Job Assignment Screen (004)	Y	Y	1
JOB STATUS	Job Status	Job status	III-26	C	JOB	Job Assignment Screen (004)	Y	Y	1
JOB STATUS DATE	Status Date	Job status date	III-26	D	JOB	Job Assignment Screen (004)	Y	Y	8
JOB PERM INDIC	Job Permanency	Job permanency indicator	III-26	C	JOB	Job Assignment Screen (004)	Y	Y	1

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Job Assignment Screen (004) (Continued)									
JOB FAMILY	Job Fam	Groups related jobs	III-26	C	JOB_TBL	Job Assignment Screen (004)	Y	Y	2
C ENTRY DATE	Class Entry	First worked date in classification	III-26	D	JOB	Job Assignment Screen (004)	Y	Y	8
WORK LOC NUMB	Work Location	Work location number	III-26	C	JOB	Job Assignment Screen (004)	Y	Y	5
WRK_SITE	Work Location	Work location sub-site	III-26	C	JOB	Job Assignment Screen (004)	Y	Y	3
WORK.LOC.TITLE	Work Location	Work location description	II-38	C	WORK_TBL	Job Assignment Screen (004)	N	Y	30
WORK PHONE	Work Phone	Work phone number	III-27	C	JOB	Job Assignment Screen (004)	Y	Y	13
WORK EXT	Ext	Work extension	III-27	C	JOB	Job Assignment Screen (004)	Y	Y	4
ANNIVER DATE	Anniv Date	Anniversary date	III-27	D	JOB	Job Assignment Screen (004)	Y	Y	8
PASS PR DATE	Pass Prob Date	Pass probation date	III-27	D	JOB	Job Assignment Screen (004)	Y	Y	8
EVALUATION TYPE	Eval Type	Type of evaluation	III-27	C	JOB	Job Assignment Screen (004)	Y	Y	1
EVALUATION DATE	Eval Due Date	Due date of evaluation	III-27	D	JOB	Job Assignment Screen (004)	Y	Y	8
BARG UNIT	Barg Unit	Bargaining unit code	III-27	C	JOB	Job Assignment Screen (004)	Y	Y	2
BARG UNIT TITLE	Code	Bargaining unit code description	II-84	C	BARG	District Codes Table (028)	N	Y	25
UNIT MEMBER	Unit Member	Member of a collective bargaining unit	III-27	C	JOB	Job Assignment Screen (004)	Y	Y	1
MILEAGE ELIG	Mileage Elig	Eligible for mileage	III-27	C	JOB	Job Assignment Screen (004)	Y	Y	1
LEAVE REASON	Leave Reason	Code for leave of absence	III-27	C	JOB	Job Assignment Screen (004)	Y	Y	2
LEAVE DESCRIPTN	REASON	Leave reason description	III-27	C	LEAVE	Job Assignment Screen (004)	N	Y	20
LEAVE TYPE	Leave Type	Employee is on paid or unpaid leave	III-27	C	JOB	Job Assignment Screen (004)	Y	Y	1
LEAVE DATE BEG	Leave Begin	Beginning date of leave of absence	III-27	D	JOB	Job Assignment Screen (004)	Y	Y	8
LEAVE DATE END	Leave End	Ending date of leave of absence	III-28	D	JOB	Job Assignment Screen (004)	Y	Y	8
TERM REASON	Termination Reason	Code for termination	III-28	C	JOB	Job Assignment Screen (004)	Y	Y	2
TERM. DESCRIPTN	Termination Reason	Termination code description	II-84	C	TERMINAT	Job Assignment Screen (004)	N	Y	20
TERM DATE	Termination Date	Date employee is to be terminated	III-28	D	JOB	Job Assignment Screen (004)	Y	Y	8
REHIRE ELIG	Termination Rehire Elig	Code whether employee is eligible for rehire	III-28	C	JOB	Job Assignment Screen (004)	Y	Y	1
Job Classification Table (004) - Additional Fields									
WORK_SCHED	PERS Work Sched	PERS work schedule	II-21	C	JOB_TBL	Job Classification Table (004)	Y	Y	2
FLSA_STAT	FLSA	Fair Labor Standards Act	II-21	C	JOB_TBL	Job Classification Table (004)	Y	Y	1
OT_ELIG	Overtime Eligibil	Overtime eligibility for job class	II-21	C	JOB_TBL	Job Classification Table (004)	Y	Y	1
CATEGORY CODE	EEO Cat	EEO Category	II-22	C	JOB_TBL	Job Classification Table (004)	N	Y	2
SUB CATEGORY CD	EEO Sub	EEO Category	II-22	C	JOB_TBL	Job Classification Table (004)	N	Y	1
RET_PLN	Ret Plan	Retirement plan	II-23	C	JOB_TBL	Job Classification Table (004)	Y	Y	2
RET_ST	Ret Stat	Retirement status	II-23	C	JOB_TBL	Job Classification Table (004)	Y	Y	1
SENIOR_FAM	Seniority Family	Groups jobs for seniority	II-24	C	JOB_TBL	Job Classification Table (004)	Y	Y	2
RET_SUBJ	Mass Retro Subj	Job class is subject to retro	II-24	C	JOB_TBL	Job Classification Table (004)	Y	Y	1
RET_STEP	Mass Retro Steps	Number of steps for retro	II-24	C	JOB_TBL	Job Classification Table (004)	Y	Y	2
RET_RANGE	Mass Retro Ranges	Indicates the number of ranges for retro	II-24	C	JOB_TBL	Job Classification Table (004)	Y	Y	3
Salary/Pay Rate Screen (005)									
PAY CYCLE	Cycle	Pay cycle	III-31	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
PAY BASIS	Basis	Pay basis	III-31	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
PAY MONTHS	Pay Mos	Pay months	III-31	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
ILL PLAN	Ill Plan	Illness plan	III-31	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
VAC PLAN	Vac Plan	Vacation plan code	III31	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
TIME REPORT LOC	Time Rpt Locn	Time report location code	III-32	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
TIME RPT CODE	Time Rpt Cd	Time report code	III-32	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
EARN TYPE	Earnings Types	Earnings type code	III-32	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
EARN TYPE2	Earnings Types	Earnings type code 2	III-32	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Salary/Pay Rate Screen (005) (Continued)									
EARN TYPE3	Earnings Types	Earnings type code 3	III-33	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
SALARY SCHEDULE	Sched	Salary schedule	III-33	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
RANGE/COL	Range	Range or column on salary schedule	III-33	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
SALARY STEP	Step	Step on salary schedule	III-33	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
SALARY EFF DATE	Eff Date	Effective date of current salary rate	III-33	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
PERCENT FT	%Full-Time	Percent of full-time service	III-33	N	JOB	Salary/Pay Rate Screen (005)	Y	Y	6
CALC METHOD	Calc Meth	Calc method	III-33	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
FT RATE	Full-time Rate	Full-time rate	III-33	N	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
SALARY RATE	Salary Rate	Salary rate	III-33	N	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
STIPEND PSN 1-5	Stipends	Periodic stipends 1-5	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	24
STIPEND POSTN 1	Stipends	Periodic stipend 1	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
STIP_DESC1	Stipends	Stipend name of periodic stipend 1	II-70	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
STIPEND POSTN 2	Stipends	Periodic stipend 2	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
STIP_DESC2	Stipends	Stipend name of periodic stipend 2	II-70	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
STIPEND POSTN 3	Stipends	Periodic stipend 3	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
STIP_DESC3	Stipends	Stipend name of periodic stipend 3	II-70	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
STIPEND POSTN 4	Stipends	Periodic stipend 4	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
STIP_DESC4	Stipends	Stipend name of periodic stipend 4	II-70	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
STIPEND POSTN 5	Stipends	Periodic stipend 5	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
STIP_DESC5	Stipends	Stipend name of periodic stipend 5	II-70	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
STIP DATE 1 CD	Stipends	Dated stipend 1 code	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
STIP DATE 1 LVL	Stipends	Dated stipend 1 level	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
D1STIP_DES	Stipends	Stipend name of dated stipend 1	II-70	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
D1STIP_ERN	Stipends	Dated Stipend 1 earnings type	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
D1STIP_DT1	Stipends	Dated stipend 1 date 1	III-34	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
D1STIP_DT2	Stipends	Dated stipend 1 date 2	III-34	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
D1STIP_DT3	Stipends	Dated stipend 1 date 3	III-34	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
D1STIP_DT4	Stipends	Dated stipend 1 date 4	III-34	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
STIP DATE 2 CD	Stipends	Dated stipend 2 code	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
STIP DATE 2 LVL	Stipends	Dated stipend 2 level	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
D2STIP_DES	Stipends	Stipend name of dated stipend 2	II-70	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
D2STIP_ERN	Stipends	Dated stipend 2 earnings type	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	3
D2STIP_DT1	Stipends	Dated stipend 2 date 1	III-34	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
D2STIP_DT2	Stipends	Dated stipend 2 date 2	III-34	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
D2STIP_DT3	Stipends	Dated stipend 2 date 3	III-34	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
D2STIP_DT4	Stipends	Dated stipend 2 date 4	III-34	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
RETIRE RATE	Retire Rate	Retirement rate	III-34	N	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
OVERRIDE	O/Ride	Override the retirement reporting rate	III-34	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
WORK DAYS	Work Days	Number of work days in a year	III-34	N	JOB	Salary/Pay Rate Screen (005)	Y	Y	5
WORK CALENDAR	Work Cal	Work calendar	III-35	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
WRK HOURS PAID	Work Hrs/Dy	Work hours per day	III-35	N	JOB	Salary/Pay Rate Screen (005)	Y	Y	5
SESS TYPE	Sess Type	Session type	III-35	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
RETIRE PLAN	Retirement Plan	Retirement plan	III-35	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
RETIRE STATUS	Retirement Status	Retirement status	III-36	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Salary/Pay Rate Screen (005) (Continued)									
RETIRE SPECIAL	Retirement Spl	Retirement special indicator	III-36	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
RETIRE DATE	Retirement Eff Date	Retirement effective date	III-36A	D	JOB	Salary/Pay Rate Screen (005)	Y	Y	8
PERS C SR	Retirement PERS Case Sts	PERS case status	-	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	1
STRS_CLS	Retirement STRS Cls Cd	STRS class code	-	C	JOB	Salary/Pay Rate Screen (005)	Y	Y	2
STRS_B_HRS	Retirement STRS Base Hrs	STRS base hours	-	N	JOB	Salary/Pay Rate Screen (005)	Y	Y	10
Labor Distribution Screen (006)									
ACCOUNT_SEQ_NO	NA	Sequence number	-	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	2
SACS_FUND	NA	Fund code and sub code, e.g. 01.0-xxxxx.x-xxxxx-xxxxx-xxxx-xxxxxxx	III-40	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	4
FUND	Fund	Fund code, e.g. 01.x-xxxxx.x-xxxxx-xxxxx-xxxx-xxxxxxx	III-40	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	2
SFUND	SACS FUND	Sub fund code, e.g. xx.0-xxxxx.x-xxxxx-xxxxx-xxxx-xxxxxxx	III-40	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	1
SACS_RESRC	NA	Resource and Project Year code, e.g. xx.x-14000.0-xxxxx-xxxxx-xxxx-xxxxxxx	III-40	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	7
RESOURCE	Resrc/ProjYr	Resource, e.g. xx.x-14000.x-xxxxx-xxxxx-xxxx-xxxxxxx	III-40	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	5
GOAL	Goal	Goal code, e.g. xx.x-xxxxx.x-11100-xxxxx-xxxx-xxxxxxx	III-40	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	5
FUNCTION	Func	Function code, e.g. xx.x-xxxxx.x-xxxxx-10000-xxxx-xxxxxxx	III-40	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	5
SACS_OBJ	Obj	Object code, e.g. xx.x-xxxxx.x-xxxxx-xxxxx-1110-xxxxxxx	III-40	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	4
OBJECT MAJOR	NA	Major object code, e.g. xx.x-xxxxx.x-xxxxx-xxxxx-1xxx-xxxxxxx	-	C	ACCOUNT		Y	Y	5
SACS_LOC	Sch/Loc	School/Location code, e.g. xx.x-xxxxx.x-xxxxx-xxxxx-xxxx-1330000	III-40	C	ACCOUNT	Labor Distribution Screen (006)	Y	Y	7
LOCATION MAJOR	NA	School/Location code, e.g. xx.x-xxxxx.x-xxxxx-xxxxx-xxxx-13xxxxx	-	C	ACCOUNT		Y	Y	2
ACCOUNT PERCENT	Percent	Account percent	III-40	N	ACCOUNT	Labor Distribution Screen (006)	Y	Y	10
SACS ACCT	NA	Account string, e.g. 01.0-14000.0-11100-10000-1110-1330000	III-40	C	ACCOUNT	Labor Distribution Screen (006)		Y	37
SACS ACCT1	NA	First 19 characters of account string, e.g. 01.0-14000.0-11100-xxxxx-xxxx-xxxxxxx	III-40	C	ACCOUNT	Labor Distribution Screen (006)			19
SACS ACCT2	NA	Last 18 characters of account string, e.g. xx.x-xxxxx.x-xxxxx-10000-1110-1330000	III-40	C	ACCOUNT	Labor Distribution Screen (006)			18
LOCATION	NA	NA	-	C	ACCOUNT		Y	Y	4
MANAGE_CD	NA	NA	-	C	ACCOUNT		Y	Y	4
OBJECT	NA	PBAS object code, e.g. xx-21100-xxxxxxx-xxxx	-	C	ACCOUNT		Y	Y	5
PROGRAM	NA	PBAS program code, e.g. xx-xxxxx-65018800-xxxx	-	C	ACCOUNT		Y	Y	8
PROG_FUNC_TYP	NA	PBAS function type	-	C	ACCOUNT		Y	Y	1
PROG PROG -3	NA	PBAS three middle digits of program, e.g. xx-xxxxx-xxx188xx-xxxx	-	C	ACCOUNT		Y	Y	3
PROG GRANT YEAR	NA	PBAS last two digist of program, e.g. xx-xxxxx-xxxxxx00-xxxx	-	C	ACCOUNT		Y	Y	2
ACCOUNT	NA	PBAS account string, e.g. 01-21100-65018800-0000	-	C	ACCOUNT		Y	Y	22
Credentials Information Screen (010)									
CRED TYPE	Type	Credential type	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	2
CRED TYPE DESC	Type	Credential type description	III-180	C	CRED_TYP	Credentials Information Screen (010)	N	Y	40
CRED TITLE	Title	Credential Title	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	4
CRED TITLE DESC	Title	Credential title description	III-180	C	CRED_TTL	Credentials Information Screen (010)	N	Y	40
CRED DOC ID	Doc Number	Credential document number	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	12
CRED CBEST	CBEST Date	CBEST date	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	10
CRED REG.NO	Regis No	Registration number	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	5
CRED REG. DATE	Regis Date	Registration date	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	10
CRED ISSUE DATE	Issue Date	Date credential was issued	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	10
CRED EXPIRE DT	Expir Date	Date credential expires	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	10
CRED AUTH_CODES	Auth	Authorization codes	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	25
CRED REN_CODES	Renew	Renewal codes	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	25
CRED MAJORS	Maj/Min/Subj	Major	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	25
CRED MINORS	Maj/Min/Subj	Minor	III-180	C	CRED	Credentials Information Screen (010)	Y	Y	25
CRED SUBJECT	Maj/Min/Subj	Subject	III-180	C	SUB_SSN	Credentials Information Screen (010)	Y	Y	4

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Credentials Information Screen (010) (Continued)									
CRED SUBJ DESC	Maj/Min/Subj	Subject description	III-180	C	SUB_SSN	Credentials Information Screen (010)	Y	Y	20
CURR_CRED	NA	Current credential	-	C	CRED	NA	Y	Y	1
SEID	NA	State EID	-	C	EMPLOYEE	NA	Y	Y	10
Longevity/Seniority Status Screen (011)									
SENIORITY SEQ	NA	Sequence number	-	C	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	2
SENIORITY STAT	Status	Seniority status	-	C	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	1
SENIORITY FAMLY	Family	Seniority family	-	C	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	2
SENIORITY LEVEL	Level	Seniority level	-	C	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	3
SENIORI_JOB_CLS	Job Class Number	Seniority job class number	-	C	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	6
SENIORI_JOB_TTL	Job Title	Seniority job title	-	C	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	25
SENIORITY BEGDT	Begin	Seniority begin date	-	D	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	8
SENIORITY ENDDT	End	Seniority end date	-	D	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	8
SENIORITY CREDIT	Credit	Seniority credit	-	N	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	7
SENIORITY CRTSQ	Cert Seq	Certificated sequence number	-	C	SENIOR	Longevity/Seniority Status Screen (011)	Y	Y	3
SENIORITY CSIGN	NA	Negative or positive seniority	-	C	SENIOR		Y	Y	1
Contact Data Screen (012)									
PREFIX	Prefix	Employee prefix	III-44	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	4
SUFFIX	Suffix	Employee Suffix	III-44	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	4
STREET	Current Address	Street	III-44	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	30
CITY	City	City	III-44	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	20
STATE	State	State	III-44	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	2
ZIP	Zip Code	Zip code	III-45	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	9
PHONE	Home Phone	Home telephone number	III-45	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	13
PHONE_INDICATOR	Phone Directory Indicator	Information printed in personnel directory	III-45	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	1
BARG_PHONE_IND	Collective Bargaining Directory Indicator	Information printed in collective bargaining directory	III-45	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	1
EMERG_CONTACT	Emergency Contact	Contact person in case of an emergency	III-45	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	30
EMER_RELATION	Relationship	Relationship to the employee	III-45	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	8
EMER_PHONE	Contact Phone	Telephone number of emergency contact person	III-45	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	13
** EMP_SSN	Current SSN	Nine-digit social security number	-	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	11
SSN_4	NA	Last four digits of current social security number	-	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	4
PRIOR_SSN	Prior SSN	Prior social security number	III-21	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	11
PRIOR_NAME	Prior Names	Prior name	III-46	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	30
PRIOR_NAME_2	Prior Names	Prior name	III-46	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	30
PRIOR_NAME_3	Prior Names	Prior name	III-46	C	EMPLOYEE	Contact Data Screen (012)	Y	Y	30
** The full SSN is only made available to districts that have a signed PC Products Addendum. If no addendum exists, then it will display as XXX-XX-3333									
Confidential Information Screen (013)									
SEX	Sex	Gender	III-48	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
ETHNIC	Ethnicity - Yes, Hispanic or Latino	Employee is of hispanic origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
DOB	Date of Birth	Birthdate	III-49	D	EMPLOYEE	Confidential Information Screen (013)	Y	Y	8
DOB_MONTH	Handicap	Birth month	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	2
DOB_YEAR	NA	Birth year	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	4
DOB_DAY	NA	Birth day	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	2
HANDICAP	Handicap	Handicap or disability	III-50	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
CIT/VISA	Citizenship/Visa	Type of citizenship or visa	III-50	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	2

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Confidential Information Screen (013) (Continued)									
CIT/CNTRY	Country	Employee current country of citizenship	III-50	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	3
VISA EXPIRE DT	Visa Expiration Date	Date visa expires	III-50	D	EMPLOYEE	Confidential Information Screen (013)	Y	Y	8
MILITARY	Military Status	Current military status	III-50	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
PERM/TEMP	Perm/Temp	Permanent or temporary	III-51	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
PART/FULL	Full/Part	Full-time or part-time employee	III-51	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
APPL TERM	Appt Term	Tenure status	III-51	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
FUND SOURCE	Fund Source	Funding source	III-51	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
AMER_IND	Amer Indian/Alaska Native	Employee is of american indian/alaskan native origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
ASIAN_IND	Asian Indian	Employee is of asian indian origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
AFR_AMER	Black or African American	Employee is of black (not hispanic origin) origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
CAMBODIAN	Camobodian	Employee is of cambodian origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
CHINESE	Chinese	Employee is of chinese origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
FILIPINO	Filipino	Employee is of filipino origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
GUAMANIAN	Guamanian	Employee is of guamanian origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
HAWAIIAN	Hawaiian	Employee is of hawaiian origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
HMONG	Hmong	Employee is of hmong origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
JAPANESE	Japanese	Employee is of japanese origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
KOREAN	Korean	Employee is of korean origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
LAOTIAN	Laotian	Employee is of Laotian origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
OTH_ASIAN	Other Asian	Employee is of other asian origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
OTH_PAC_IS	Other Pacific Islander	Employee is of other pacific islander origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
SAMOAN	Samoan	Employee is of samoan origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
TAHITIAN	Tahitian	Employee is of tahitian origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
VIETNAMESE	Vietnamese	Employee is of vietnamese origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
WHITE	White	Employee is of white origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
HISPANIC	NA	Employee is of hispanic origin	III-49	C	EMPLOYEE	Confidential Information Screen (013)	Y	Y	1
ETHNIC_1	NA	First ethnicity selected	-	C	EMPLOYEE		Y	Y	15
ETHNIC_2	NA	Second ethnicity selected	-	C	EMPLOYEE		Y	Y	15
ETHNIC_3	NA	Third ethnicity selected	-	C	EMPLOYEE		Y	Y	15
ETHNIC_4	NA	Fourth ethnicity selected	-	C	EMPLOYEE		Y	Y	15
ETHNIC_5	NA	Fifth ethnicity selected	-	C	EMPLOYEE		Y	Y	15
Misc Personal Data Screen (014)									
TB DATE	TB Date	Tuberculosis date	III-73	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	7
PHYS EXAM DATE	Physical Exam Date	Date of employees next physical exam	III-73	D	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	8
EDUCATION LEVEL	Education Level	Highest level of education completed	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	2
ED LVL YEARS	Education Level Year	Year degree, certificate, or diploma was received	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	2
DL NUMBER	Driver's License Nbr	Driver's license number	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	8
DL EXPIRE DATE	Expir Date	Expiration date of driver's license	III-74	D	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	8
DL CLASS	Class	Driver's license class	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	1
DIST CODE 1	District Code 1	Defined by district	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	2
DIST DATE 1	Date 1	Date defined by district	III-75	D	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	8
DIST CODE 2	District Code 2	Defined by district	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	2
DIST DATE 2	Date 2	Date defined by district	III-75	D	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	8
DIST CODE 3	District Code 3	Defined by district	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	6
DIST CODE 4	District Code 4	Defined by district	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	6
DIST CODE 5	District Code 5	Defined by district	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	30

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Misc Personal Data Screen (014) (Continued)									
DIST CODE 6	District Code 6	Defined by district	III-74	C	EMPLOYEE	Misc Personal Data Screen (014)	Y	Y	30
Education Screen (015)									
DEGREE	Degr	Degree earned or pursued	III-77	C	DEGREE	Education (015)	Y	Y	4
DEG TYPE	Type	Type of degree	III-77	C	DEGREE	Education (015)	Y	Y	1
YR DEGREE	Yr	Year the degree was earned	III-77	C	DEGREE	Education (015)	Y	Y	4
INST NAME	Institution	Name of institution awarding the degree	III-77	C	DEGREE	Education (015)	Y	Y	15
INST CODE	Institution Code	Institution awarding the degree	III-77	C	DEGREE	Education (015)	Y	Y	6
DEGREE MAJOR	Major	Major field of study for the degree	III-77	C	DEGREE	Education (015)	Y	Y	14
DEGREE MINOR	Minor	Minor field of study for the degree	III-77	C	DEGREE	Education (015)	Y	Y	14
CR EARNED	Credits Earned	Number of course credits earned	III-77	C	DEGREE	Education (015)	Y	Y	3
CR NEEDED	Credits Req	Number of course credits needed	III-77	C	DEGREE	Education (015)	Y	Y	3
Experience and Organization Screen (016)									
EXP_TYPE	Experience Typ	Type of work experience	III-78	C	EXP	Experience and Organization Screen (016)	Y	Y	1
EXP_NAME	Experience Employer	Previous employer	III-79	C	EXP	Experience and Organization Screen (016)	Y	Y	15
EXP_CODE	Experience Code	Represent a company or profession	III-79	C	EXP	Experience and Organization Screen (016)	Y	Y	6
EXP_LOC	Experience Loc	Location of school or business	III-79	C	EXP	Experience and Organization Screen (016)	Y	Y	2
EXP_OFFICE	Experience H/P	Highest position held in the organization	III-79	C	EXP	Experience and Organization Screen (016)	Y	Y	1
EXP_TITLE	Experience Title/Function	Work title or function of work experience	III-79	C	EXP	Experience and Organization Screen (016)	Y	Y	20
EXP_BEG	Experience From	Beginning date of the work experience	III-79	D	EXP	Experience and Organization Screen (016)	Y	Y	8
EXP_END	Experience To	Ending date of the work experience	III-79	D	EXP	Experience and Organization Screen (016)	Y	Y	8
EXP_SALARY	Experience Ending Salary (1000s)	Maximum salary earned at work experience	III-79	C	EXP	Experience and Organization Screen (016)	Y	Y	2
PRO_NAME	Prof Org Organization/Society Name	Abbreviated name of affiliated professional organization	III-79	C	PROF	Experience and Organization Screen (016)	Y	Y	15
PRO_OFFICE	Prof Org Highest Office	Code of highest office held in the professional organization	III-79	C	PROF	Experience and Organization Screen (016)	Y	Y	1
PRO_BEG	Prof Org From	Year the employee first held the office	III-79	C	PROF	Experience and Organization Screen (016)	Y	Y	4
PRO_BEG_YY	NA	Last two digits of the From date		C	PROF		Y	Y	2
PRO_END	Prof Org To	Year the employee left the office	III-79	C	PROF	Experience and Organization Screen (016)	Y	Y	4
PRO_END_YY	NA	Last two digits of the To date		C	PROF		Y	Y	2
Skills and Languages Screen (017)									
LANGUAGE	Language	Languages proficient	III-81	C	LANGUAGE	Skills and Languages Screen (017)	Y	Y	15
LANG_PROF	Proficiency	Fluency/proficiency in the language	III-81	C	LANGUAGE	Skills and Languages Screen (017)	Y	Y	1
SKL_TYPE	Skill Type	Type of skills the employee acquired	III-81	C	SKILLS	Skills and Languages Screen (017)	Y	Y	7
SKL_YR_PRO	Skill Proficiency	Employee's proficiency using this skill	III-81	C	SKILLS	Skills and Languages Screen (017)	Y	Y	1
SKL_MO_EXP	Skill Experience (Months)	Number of months of experience using this skill	III-81	C	SKILLS	Skills and Languages Screen (017)	Y	Y	3
SKL_YR_LU	Skill Year Last Used	Last year in which the employee used this skill	III-81	C	SKILLS	Skills and Languages Screen (017)	Y	Y	4
Licenses, Honors and Comments Screen (018)									
LIC_NAME	License/Certificate	Name of license or certificate	III-83	C	LICENSE	Licenses, Honors and Comments Screen (018)	Y	Y	14
LIC_YEAR	Year Obtained	Year the license/certificate was received	III-83	C	LICENSE	Licenses, Honors and Comments Screen (018)	Y	Y	2
LIC_EXP_DT	Date Expires	Expiration of license/certificate	III-83	C	LICENSE	Licenses, Honors and Comments Screen (018)	Y	Y	7
LIC_YY	NA	Year the license/certificate expires	III-83	C	LICENSE	Licenses, Honors and Comments Screen (018)	Y	Y	2
HNR_AWARD	Honor/Award	Type of honor/award received	III-83	C	HONORS	Licenses, Honors and Comments Screen (018)	Y	Y	18
HNR_YEAR	Honor Year Obtained	Year the honor/award was received	III-83	C	HONORS	Licenses, Honors and Comments Screen (018)	Y	Y	4
HNR_YY	NA	Year the honor/award was received	III-83	C	HONORS	Licenses, Honors and Comments Screen (018)	Y	Y	2
COMMENTS	Comments	Comments regarding the employee	III-83	C	EMPLOYEE	Licenses, Honors and Comments Screen (018)	Y	Y	60
Benefits and Additional Benefits Screens (020/021)									
BENEFIT ELIG CD	Benefit Elig	Benefit eligibility	III-55	C	EMPLOYEE	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	1
DEPENDENT # OF	Dependents	Eligible employee dependents	III-55	C	EMPLOYEE	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	2

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Benefits and Additional Benefits Screens (020/021) (Continued)									
CAFETERIA MAX	Café Max	Cafeteria maximum	III-55	N	EMPLOYEE	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	7
BEN. VERSION	NA	Version of benefit table	II-76	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	2
BEN. SEQUENCE #	NA	Benefit sequence number	-	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	2
BEN. TYPE	NA	Identifies the type of benefit	II-77	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	3
BEN. TYPE DESC.	NA	Description of the benefit plan code	II-77	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	8
BEN. PLAN	Plan	Benefit plan code	III-55	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	3
BEN. PLAN DESC.	Description	Description of coverage level	III-55	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	7
BEN. COVER	Coverg	Benefit plan coverage	III-55	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	2
BEN. DEDUCT GTN	Deduction Number	Benefit deduction gross-to-net number	III-55	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	3
BEN. DEDUCT AMT	Deduction Employee	Benefit deduction amount	III-55	N	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	10
BEN DED OVERRIDE	Deduction Override	Benefit deduction override indicator	III-55	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	3
BEN. CONTRB.GTN	Contribution Number	Benefit contribution gross-to-net number	III-56	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	3
BEN. CONTRB AMT	Contribution Employer	Benefit contribution amount	III-56	N	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	10
BEN CON OVERRIDE	Contribution Override	Benefit contribution override indicator	III-56	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	3
BEN. EFFECT DT	Effective Date	Benefit effective Date	III-56	D	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	8
BEN. ENDING DT	Effective End Date	Benefit ending Date	III-56	D	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	8
BEN. PEND FLAG	P	Pending benefit eligibility approval	III-56	C	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	8
BEN. PAY BEG DT	Payroll Begin Date	Benefit payroll effective date	III-56	D	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	8
BEN. PAY END DT	Payroll End Date	Benefit payroll ending date	III-56	D	BENEFITS	Standard Benefits/Adtl Standard Benefits Screens (020/021)	Y	Y	8
Dependents By Name Screen (022)									
DEPENDENT NAME	Dependent Name	Name of dependent	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	26
DEPENDENT SSN	Dependent SSN	Dependent SSN	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	11
DEPENDENT DOB	Birthday	Dependent birthdate	III-85	D	DEPEND	Dependents By Name Screen (022)	Y	Y	8
DEPENDNT RELATN	Rel	Relationship of dependent	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	1
DEPENDNT STUDNT	Stu	Identifies if dependent is a student	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	1
DEPENDENT BEN 1	Plan Code 1	Dependent eligibility for a given benefit plan	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	3
DEPENDENT BEN 2	Plan Code 2	Dependent eligibility for a given benefit plan	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	3
DEPENDENT BEN 3	Plan Code 3	Dependent eligibility for a given benefit plan	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	3
DEPENDENT BEN 4	Plan Code 4	Dependent eligibility for a given benefit plan	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	3
DEPENDENT BEN 5	Plan Code 5	Dependent eligibility for a given benefit plan	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	3
DEPENDENT BEN 6	Plan Code 6	Dependent eligibility for a given benefit plan	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	3
DEPENDENT BEN 7	Plan Code 7	Dependent eligibility for a given benefit plan	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	3
DEPENDNT BENALL	Plan Code 1-7	Concatenates dependent benefit plan codes 1-7	III-85	C	DEPEND	Dependents By Name Screen (022)	Y	Y	27
DEPENDNT INS DT	NA	Dependent insurance date	-	D	DEPEND		Y	Y	8
DEPENDNT REV ST	NA	Dependent reversal date	-	C	DEPEND		Y	Y	1
DEPENDNT REV DT	NA	Dependent reversal status	-	D	DEPEND		Y	Y	8
Voluntary Deductions Screen (023)									
DED. SEQUENCE #	NA	Deduction sequence number	-	C	CONTRIB	Voluntary Deductions Screen (023)	Y	Y	2
DED. GTN	GTN Number	Gross-To-Net Number	III-64	C	CONTRIB	Voluntary Deductions Screen (023)	Y	Y	3
DED. GTN DESC	Description	Description of the GTN Number	III-64	C	CONTRIB	Voluntary Deductions Screen (023)	Y	Y	10
DED. GTN TYPE	Typ	Deduction type code	III-64	C	CONTRIB	Voluntary Deductions Screen (023)	Y	Y	1
DED. VENDOR	Vendor Code	Vendor code	III-64	C	CONTRIB	Voluntary Deductions Screen (023)	Y	Y	10
DED. DEDUCT AMT	Deduction Amount	Deduction amount	III-64	N	CONTRIB	Voluntary Deductions Screen (023)	Y	Y	10
DED. BALNC. AMT	Deduction Balance	Balance decrements	III-65	N	CONTRIB	Voluntary Deductions Screen (023)	Y	Y	10
DED. BEGIN DATE	Beginning Date	Deduction beginning date	III-65	D	CONTRIB	Voluntary Deductions Screen (023)	Y	Y	8

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Voluntary Deductions Screen (023) (Continued)									
DED_END_DATE	Ending Date	Deduction ending date	III-65	D	CONTRIB	Voluntary Deductions Screen (023)	Y	Y	8
TSA_CNTRIB	NA	DED. DEDUCT AMT multiplied by period (e.g. 10)	-	N	CONTRIB		N	N	NA
Direct Deposit Screen (025)									
DD_INST_ID	Fin Institution	Financial institution number	-	C	EMPLOYEE	Direct Deposit Screen (025)	Y	Y	9
DD_ACCT_NO	Account Number	Account number	-	C	EMPLOYEE	Direct Deposit Screen (025)	N	N	17
DD_ACCT_TP	Account Type	Account type	-	C	EMPLOYEE	Direct Deposit Screen (025)	Y	Y	1
DD_APPRVAL	Status	Account status	-	C	EMPLOYEE	Direct Deposit Screen (025)	Y	Y	1
DD_SET_DT	Set-up Date	Set-up date	-	D	EMPLOYEE	Direct Deposit Screen (025)	Y	Y	8
DD_PREN_DT	Pre-Note Date	Pre-note date	-	D	EMPLOYEE	Direct Deposit Screen (025)	Y	Y	8
Payroll Tax Status Screen (030)									
FED_ALLOW	Federal Reg Allow	Number of Federal regular allowance	III-68	N	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	2
FED_MRT_ST	Federal Tax Marital Status	Federal marital status	III-69	C	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	1
FED_ADD_WH	Federal Additional W/Holding	Federal additional dollar amount	III-69	N	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	10
FED_ADD_AL	NA	Number of Federal additional allowance	-	N	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	2
ST_ALLOW	State Reg Allow	Number of State regular allowance	III-69	N	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	2
ST_MRT_ST	State Tax Marital Status	State marital status	III-69	C	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	1
ST_ADD_WH	State Additional W/Holding	State additional dollar amount	III-69	N	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	10
ST_ADD_AL	State Additional Allow	Number of state additional allowance	III-69	N	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	2
SUP_TX_OPT	Supplemental Taxing Option	Supplemental taxing method	III-69	C	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	1
SDI_COVER	SDI Coverage	Coverage for disability insurance	III-69	C	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	1
AEIC_STAT	AEIC	Identifies Advanced Earned Income Credit	III-69	C	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	1
SUI_EXEMPT	SUI Exemption	Exemption for unemployment insurance	III-70	C	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	2
WC_EXEMPT	W/C Exemption	Worker's Compensation coverage	III-70	C	EMPLOYEE	Payroll Tax Status Screen (030)	Y	Y	1
Leave Account Balances Screen (031)									
SICK_BAL	5102 Ill/Inj Balance	Illness balance	III-193	N	EMPLOYEE	Leave Account Balances Screen (031)	Y	Y	10
VAC_BAL	5101 Vacation Balance	Vacation balance	III-193	N	EMPLOYEE	Leave Account Balances Screen (031)	Y	Y	10
Time Balances Screen (033)									
HOURS DAILY	5121 Daily FY	Daily balance of hours for fiscal year	III-193	N	EMPLOYEE	Time Balances Screen (033)	Y	Y	12
HOURS FY	5120 Hourly FY	Hourly balance for fiscal year	III-193	N	EMPLOYEE	Time Balances Screen (033)	Y	Y	12
HOURS OVT	5161 Overtime HRS-F	Overtime hours balance for fiscal year	III-193	N	EMPLOYEE	Time Balances Screen (033)	Y	Y	12
HOURS REG	5160 Reg HRS-F	Regular hours balance for fiscal year	III-193	N	EMPLOYEE	Time Balances Screen (033)	Y	Y	12
HOURS TOT	5116 Total HRS Pd-F	Total paid hours balance for fiscal year	III-193	N	EMPLOYEE	Time Balances Screen (033)	Y	Y	12
Gross Dollars Balances Screen (034)									
FED_YTD	5509 Total Federal YTD	Employee federal year-to-date balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
GROSS_YTD	5501 Total Gross YTD	Employee gross year-to-date balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
STATE_YTD	5505 Total State YTD	Employee state year-to-date balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
W-2 FEDERAL	5580 Fedrl Gross-P (Box 1)	W-2 prior year federal gross balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
W-2 FWT	5538 FWT Ded-P (Box 2)	W-2 prior year federal withholding balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
W-2 HEALTH	5629 Health Ben-P (Box 12)	W-2 prior year health benefit balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Gross Dollar Balances Screen (034) (Continued)									
W-2 MED TAX	5577 Med Ded-P (Box 6)	W-2 prior year medicare deduction	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
W-2 MEDICARE	5574 Med Gross-P (Box 5)	W-2 prior year medicare gross balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
W-2 OASDI	5515 OASDI Gross-P (Box 3)	W-2 prior year OASDI gross balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
W-2 OASDI TAX	5518 OASDI Ded-P (Box 4)	W-2 prior year OASDI deduction	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
W-2 STATE	5581 State Gross-P (Box 16)	W-2 prior year state gross balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
W-2 SWT	5539 SWT Ded-P (Box 17)	W-2 prior year state withholding balance	III-196	N	EMPLOYEE	Gross Dollar Balances Screen (034)	Y	Y	12
Other Fields									

Date

AGE IN YEARS	NA	Age in years	-	C	EMPLOYEE		Y	Y	2
YEARS SERVED	NA	Years served	-	C	EMPLOYEE		Y	Y	2

Salary Calculation

HRLY_RATE	NA	Hourly rate	-	N	JOB		Y	Y	10
DAILY_RATE	NA	Daily rate	-	N	JOB		Y	Y	10
ANNUAL SALARY	NA	Annual salary	-	N	JOB		Y	Y	10
SALARY BASE	NA	Base salary	-	N	JOB		Y	Y	10
ANN BASE	NA	Annual base salary	-	N	JOB		Y	Y	10
STRS A SAL	NA	STRS annual salary	-	C	JOB		Y	Y	1
TOT_STIP	NA	Total periodic stipend	-	N	JOB		Y	Y	10
ANN_STIP	NA	Annual periodic stipend	-	N	JOB		Y	Y	10
TOT_DSTIP	NA	Total dated stipend	-	N	JOB		Y	Y	10
ANN_DSTIP	NA	Annual dated stipend	-	N	JOB		Y	Y	10
SAL_W_STIP	NA	Salary rate with dated stipends	-	N	JOB		Y	Y	10
ANN_W_STIP	NA	Annual rate with dated stipends	-	N	JOB		Y	Y	10

Salary Proration

PERCENT FT PRO	NA	Prorated Percent full-time	-	N	ACCOUNT		Y	Y	10
WORK DAY PRO	NA	Prorated work days	-	N	ACCOUNT		Y	Y	10
WRK HRS PD PRO	NA	Prorated work hours per day	-	N	ACCOUNT		Y	Y	10
D_RATE_PRO	NA	Prorated daily rate	-	N	ACCOUNT		Y	Y	10
FT RATE PRO	NA	Prorated full-time rate	-	N	ACCOUNT		Y	Y	10
SALARY RATE PRO	NA	Prorated salary rate	-	N	ACCOUNT		Y	Y	10

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Other Fields (Continued)									
ANNUAL SAL PRO	NA	Prorated annual salary	-	N	ACCOUNT		Y	Y	10
RETIRE RT PRO	NA	Prorated retirement rate	-	N	ACCOUNT		Y	Y	10
PRO SAL BASE	NA	Prorated base salary	-	N	ACCOUNT		Y	Y	10
ANN BASE PRO	NA	Prorated annual base salary	-	N	ACCOUNT		Y	Y	10

Benefits Proration

DED_AMT	NA	Total deduction amount	-	N	JOB		Y	Y	10
CON_AMT	NA	Total contribution amount	-	N	JOB		Y	Y	10
BEN CON. PROAMT	NA	Prorated contribution amount	-	N	BENEFITS		N	Y	10
BEN DED. PROAMT	NA	Prorated deduction amount	-	N	BENEFITS		N	Y	10
CON. PROAMT	NA	Total prorated contribution amount	-	N	ACCOUNT		N	Y	10
DED. PROAMT	NA	Total prorated deduction amount	-	N	ACCOUNT		N	Y	10

Other

OES	NA	Group code for annual salary	-	C	JOB	Office of Emergency Services	Y	Y	1
OES_DESC	NA	Group code range for annual salary	-	C	JOB	Office of Emergency Services	N	Y	20
PAU	NA	Principal Administrative Unit code	-	C	JOB		Y	Y	3
PAU_DESC	NA	Principal Administrative Unit description	-	C	PAU_TBL		N	Y	35
DIVISION	NA	Division description code	-	C	JOB		Y	Y	1
DIV_DESC	NA	Division description	-	C	DIV_TBL		N	Y	35

Position Control Database (PCDB)

Basic Position Information Screen (012)

PC POSITION #	NA	Position number	PC I-3	C	PDB	Basic Position Information Screen (012)	Y	Y	6
PC JOB CLASS #	Job Class	Job class number	PC III-9	C	PDB	Basic Position Information Screen (012)	Y	Y	6
PC JOB TITLE	Job Class Title	Job class title	PC III-9	C	PDB	Basic Position Information Screen (012)	Y	Y	25
PC CNTRL METH	Control Method	Control method	PC III-10	C	PDB	Basic Position Information Screen (012)	Y	Y	1
PC FTE	Position Units	Allocation of FTE	PC III-11	N	PDB	Basic Position Information Screen (012)	Y	Y	9
PC DOLLAR AMT	Position Dollars	Maximum pay allocation	PC III-11	N	PDB	Basic Position Information Screen (012)	Y	Y	10
PC STATUS	Position Status	Status of the position	PC III-11	C	PDB	Basic Position Information Screen (012)	Y	Y	1
PC STATUS DATE	Status Date	Date position is established	PC III-11	D	PDB	Basic Position Information Screen (012)	Y	Y	8
PC ACTIVATE DT	Active Date	Date position is activated	PC III-11	D	PDB	Basic Position Information Screen (012)	Y	Y	8
PC CLOSE DATE	Cose Date	Date position is closed	PC III-12	D	PDB	Basic Position Information Screen (012)	Y	Y	8
P_FTE_PAID	Incumbent Statuses Filled	FTE count of paid employees	PC III-13	N	PDB	Basic Position Information Screen (012)	Y	Y	10
P_FTE_VACN	Vacancy Statuses Total Vacant	FTE count of all open jobs	PC III-14	N	PDB	Basic Position Information Screen (012)	Y	Y	10
PC FILL STATUS	NA	Fill status indicator	-	C	PDB		Y	Y	1
PC WORK LOC #	Work Location	Work location of position	PC III-14	C	PDB	Basic Position Information Screen (012)	Y	Y	8
PC WORK TITLE	Work Location Title	Work location description	PC III-14	C	PDB	Basic Position Information Screen (012)	Y	Y	30
PC RPT GROUP	Report Group	Report group	PC III-14	C	PDB	Basic Position Information Screen (012)	Y	Y	6
PC BARG UNIT	Bargaining Unit	Bargaining unit code	PC III-14	C	PDB	Basic Position Information Screen (012)	Y	Y	2

Labor Distribution Screen (013)

PC FUND	Fund	Fund and sub fund code, e.g. 01.0-xxxx.x-xxxx-xxxx-xxxx-xxxxxx	PC III-19	C	PDB_ACC	Labor Distribution Screen (013)	Y	Y	4
PC RESOURCE	Resrce/ProjYr	Resource and Project Year code, e.g. xx.x-14000.0-xxxx-xxxxxx-xxxx-xxxxxx	PC III-19	C	PDB_ACC	Labor Distribution Screen (013)	Y	Y	7
PC GOAL	Goal	Goal code, e.g. xx.x-xxxx.x-11100-xxxx-xxxx-xxxxxx	PC III-19	C	PDB_ACC	Labor Distribution Screen (013)	Y	Y	5

Field Name	HRS FIELD (if applicable)	Description	HRS Manual	Type	Table Name	Screen Name and Number	Selection Criteria	Sorting	Length
Labor Distribution Screen (013) (Continued)									
PC FUNCTION	Func	Function code, e.g. xx.x-xxxx.x-xxxx-10000-xxxx-xxxxxx	PC III-19	C	PDB_ACC	Labor Distribution Screen (013)	Y	Y	5
PC OBJECT	Obj	Object code, e.g. xx.x-xxxx.x-xxxx-xxxxxx-1110-xxxxxx	PC III-19	C	PDB_ACC	Labor Distribution Screen (013)	Y	Y	4
PC LOCATION	Sch/Loc	School/Location code, e.g. xx.x-xxxx.x-xxxx-xxxxxx-xxxx-1330000	PC III-19	C	PDB_ACC	Labor Distribution Screen (013)	Y	Y	7
PC ACCOUNT %	Percent	Account percent	PC III-19	N	PDB_ACC	Labor Distribution Screen (013)	Y	Y	7
PC ACCOUNT	NA	Account string, e.g. 01.0-14000.0-11100-10000-1110-1330000	PC III-19	C	PDB_ACC	Labor Distribution Screen (013)	N	Y	37
Financial Information Screen (014)									
PC PAY BASIS	Pay Basis	Pay basis	PC III-24	C	PDB	Financial Information Screen (014)	Y	Y	1
PC ENUMB OPTN	Project Option	Type of projection calculation	PC III-24	C	PDB		Y	Y	1
PC WORK CAL	Work Calendar	Work calendar	PC III-24	C	PDB	Financial Information Screen (014)	Y	Y	2
PC PERCENT FT	Percent Full-Time	Percent full-time	PC III-24	N	PDB	Financial Information Screen (014)	Y	Y	6
PC SAL SCHED	Vacant Salary Sched	Salary schedule for position	PC III-24	C	PDB	Financial Information Screen (014)	Y	Y	1
PC SAL RANGE	Vacant Salary Range	Salary range or column for position	-	C	PDB	Financial Information Screen (014)	Y	Y	3
PC SAL STEP	Vacant Salary Step	Salary step for position	PC III-24	C	PDB	Financial Information Screen (014)	Y	Y	2
PC SAL RATE	NA	Salary rate of position	-	N	PDB		Y	Y	10
PC INC DATE	Step Inc Months	Number of months used to project	PC III-24	D	PDB	Financial Information Screen (014)	Y	Y	8
PC MONTHS	NA	Pay months	-	C	PDB		Y	Y	2
PC STIPENDS	Stipends	Periodic stipends 1-5	PC III-24	C	PDB	Financial Information Screen (014)	Y	Y	15
PC RETIRE PLAN	Retire Plan	Retirement plan	PC III-25	C	PDB	Financial Information Screen (014)	Y	Y	2
PC BENEFIT PACK	Benefit Pkg	District contributions to standard benefits	PC III-25	C	PDB	Financial Information Screen (014)	Y	Y	2
PC BENE PACK MO	Benefit Months	Number of months of benefit package	PC III-25	C	PDB	Financial Information Screen (014)	Y	Y	2
PC ADDN PACKAGE	Addl Contribution Pkg	District contributions to other types of benefits	PC III-25	C	PDB	Financial Information Screen (014)	Y	Y	2
PC ADDN PMO	Addl Contribution Months	Number of months of additional benefit package	PC III-25	C	PDB	Financial Information Screen (014)	Y	Y	2
Incumbent Information Screen (018)									
PC INCUMBENT	Incumbent Name	Name of incumbent	PC III-42	C	P_INCUMB	Incumbent Information Screen (018)	N	Y	30
PC PRIME	NA	Prime job number indicator	III-20	C	P_INCUMB	Personnel Action Data Screen (003)	Y	Y	1
PC JOB	Job	Job number	PC III-42	C	P_INCUMB	Incumbent Information Screen (018)	Y	Y	1
PC INC PCT	Percent Full-Time	Percent full-time	PC III-43	N	P_INCUMB	Incumbent Information Screen (018)	Y	Y	6
PC INC LOC	Work location description	Work location description	PC III-43	C	P_INCUMB	Incumbent Information Screen (018)	N	Y	30
Other Fields									
PC FTE PRO	NA	Prorated FTE	-	N	PDB_ACC		Y	Y	7
PC DOLLAR PRO	NA	Prorated dollar amount	-	N	PDB_ACC		Y	Y	10
PC PCT FT PRO	NA	Prorated Percent full-time	-	N	PDB_ACC		Y	Y	10
PC SAL PRO	NA	Prorated salary rate	-	N	PDB_ACC		Y	Y	10

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Conditions List

The following operators are used to build selection criteria conditions.

Comparison Operator	Description
Equal To (=)	Selects one field value to include
Not Equal To (≠)	Selects one field value to exclude
Greater Than (>)	Selects field values greater than the selected value
Greater Than Equal To (≥)	Selects field values greater than or equal to the selected value
Less Than (<)	Selects field values less than the selected value
Less Than Equal To (≤)	Selects field values less than or equal to the selected value
Between	Selects field values within a range including the beginning and ending values
Not Between	Selects field values outside a range of values
In List	Selects one or more values to include
Not In List	Selects one or more values to exclude from the field chosen
Anywhere In	Selects field values with a specific string of values in a specific order . If “mas” is the value selected to filter by last name, names such as Thomas, M assey, M asters, and Com as t will be selected.

Major Object and Sub Object Codes

California School Accounting Manual

Major Object – account type defined by the first digit of the object code

Major Object	Object Range	Description
1***	1000 – 1999	Certificated Personnel Salaries
2***	2000 – 2999	Classified Personnel Salaries
3***	3000 – 3999	Employee Benefits
4***	4000 – 4999	Books and Supplies
5***	5000 – 5999	Services and Other Operating Expenditures
6***	6000 – 6999	Capital Outlay
7***	7000 – 7999	Other Outgo & Other Financing Uses
8***	8000 – 8999	Revenues
9***	9000 – 9999	Balance Sheet

Sub Object - account type defined by the first two digits of the object code

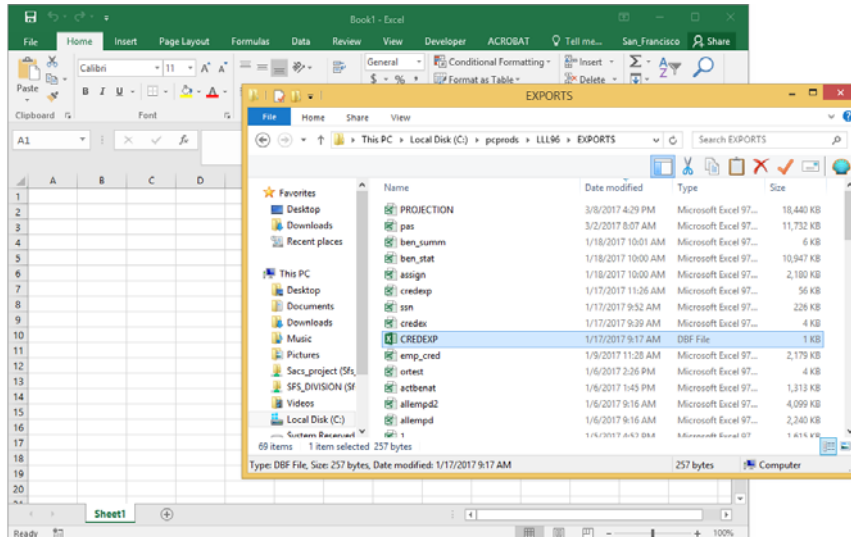
Sub Object	Object Range	Description
11**	1100 – 1199	Certificated Teachers' Salaries
12**	1200 – 1299	Certificated Pupil Support Salaries
13**	1300 – 1399	Cert. Supervisors' and Administrators' Salaries
14** - 18**	1400 – 1899	Not Defined
19**	1900 – 1999	Other Certificated Salaries
21**	2100 - 2199	Classified Instructional Salaries
22**	2200 - 2299	Classified Support Salaries
23**	2300 - 2399	Classified Supervisors' and Administrators' Salaries
24**	2400 - 2499	Clerical, Technical, and Office Staff Salaries
25** - 28**	2500 - 2899	Not Defined
29**	2900 - 2999	Other Classified Salaries

Open Database (DBF) Files with Excel

Below are two options for opening database output files in Excel format when the spreadsheet file exceeds 16,383 lines.

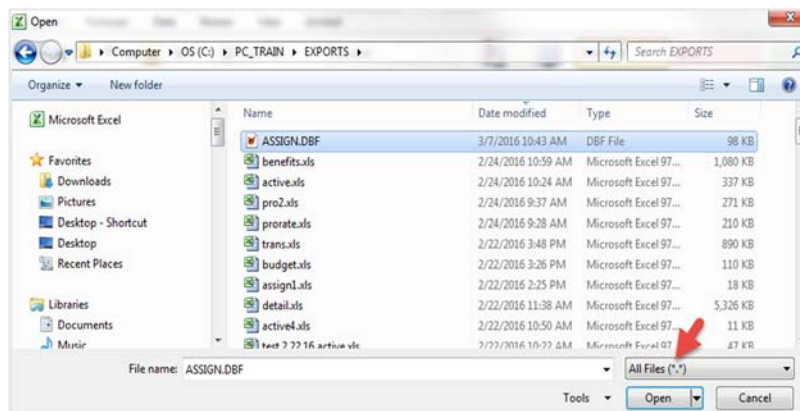
Option 1

1. Open Excel.
2. Locate folder with the file.
3. Make sure the Excel spreadsheet and the directory where the DBF file is located are visible.
4. Use the left mouse button to select the file.
5. Drag and drop the file onto the Excel spreadsheet to open the file.
6. Save as an Excel file.



Option 2

1. Open Excel.
2. Select **File>Open**.
3. Locate folder with the file. You will not initially see file listed.
4. Select All Files (*.*) from drop-down list in lower right corner of screen. The DBF file will now be listed.
5. Highlight the file.
6. Click **Open**.
7. Save as an Excel file.



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