

Database Description

The PersonnelDW database contains quarterly information about employee demographics, classification of work, FTE, and funding source for the community and technical colleges and SBCTC.

This database combines both legacy PMIS records and PeopleSoft HCM records to form a longitudinal dataset spanning back to summer quarter of 2006-07. Legacy records exclude records with an employee status of Sabbatical, Leave, or Unknown. For both legacy and PeopleSoft, hourly workers and student work study records are excluded. Volunteers are excluded. Retirees are also excluded from both data sources.

- Hourly Workers, Student Work study and Volunteers
 - Excluded by: `EMPL_CLASS NOT IN ('STU','HRY','VOL')`
- Retirees are associated to Business Unit 900; Business Unit 900 is not included in the extract

For PeopleSoft records, all applicable employees who have received a paycheck with a valid active Combo Code/Account Code and a Primary Flag with earn codes 'FTF', 'PTF', 'REG', 'MLC' during the quarter are included in the extract. This is determined by comparing the paycheck `PAY_END_DT` to the institution's `TERM_BEGIN_DT + 14` days and the institution's `TERM_END_DT + 14` days.

- Based on the `PS_PAY_EARNINGS` table record with `PAY_END_DT` between the institution's `TERM_BEGIN_DT + 14` days and `TERM_END_DT + 14` days
- `SYSADM_HCM.PS_PAY_EARNINGS.OFF_CYCLE` must be 'N'.
- The `TERM_BEGIN_DT` and `TERM_END_DT` used is the `SYSADM_CS.PS_TERM_TBL` entry for `ACAD_CAREER = 'UGRD'` for the college.
- `SYSADM_HCM.PS_JOB FTE > 0`
- The employee must appear in `SYSADM_HCM.PS_CTC_EARNS_DIST` with an effective date before the `SYSADM_CS.PS_TERM_TBL TERM_END_DT` for the institution and an `ERNCD` of 'FTF', 'PTF', 'REG' or 'MLC', and `PRIMARY_FLAG = 'Y'`. (For all term dates in the creation of this database, the Spokane dates are used for SBCTC.)
- The Account Code for the `SYSADM_HCM.PS_CTC_EARNS_DIST` selected above must be Active status and `PROCESS_GROUP LIKE '%PAYROLL%'` in the table `VALID_COMBO_TBL` with an effective date before the `TERM_TBL.TERM_END_DT` for the institution.
- `SYSADM_HCM.PS_PAY_EARNINGS.OFF_CYCLE` must be 'N'.

We pull a base set of employees based on the pay earnings as described above.

With these employees, we make sure they are active employees during the college's term by using the following criteria:

- Using `JOB.HR_STATUS = 'A'` and `EMPL_STATUS IN 'A' or 'L'` and `FTE > 0` that is

effective dated between the TERM_BEGIN_DT and TERM_END_DT (this effective date is **not** adjusted for pay periods, there is no + 14 days added to the criteria)

- PS_JOB Effective Dated Action Date uses the job record EFFDT
- These employees are **excluded**:
 - JOB.EMPL_STATUS <> 'A' or 'L'
 - JOB.EMPL_CLASS = 'STU' or 'HRY' or 'VOL'
 - JOB.FTE = 0
- The employees who are excluded per the above criteria are excluded only if the exclusion criteria are met before the term begin date **and** no criteria/records for inclusion are subsequently met prior to the term end date. (In other words, if an inclusion event occurs after the exclusion criteria are met, the employee will be included.) Regardless of any other criteria and timing, SYSADM_HCM.PS_JOB FTE **must** be > 0 for inclusion
- The new PRORATED_FTE field will reflect a prorated FTE amount based on the number of days worked during the term. For example, if a full-time employee left the institution exactly half way through the term, their FTE value would be 1, but their PRORATED_FTE value would be .5. This allows for position related analysis. For legacy records, the PRORATED_FTE value is the same as the FTE value.
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- QHC_DS_PAY_EARN_JOB_DW_DTL Field name and definition to support above criteria sections above:

Field Label in Queries	Description of Field	Field Type	Notes
Empl Class	Employee Class Code	Char3	
Headcount by Company	Aggregate count by EmplClass, Company in Term	SNum13.0	
Company	Company code	Char3	
Unit	HR Business Unit	Char4	
ID	Employee ID	Char11	
Max Pay End Date in Term	Maximum Pay End Date found in Pay Earnings for the Term + 14 for that Employee	Date	PAY_END_DT BETWEEN TERM_BEGIN_DT + 14 AND TERM_END_DT + 14
Empl Record	Associated Employee Record	Num3.0	
Term	Term Code	Char4	
Institution	Associated Institution	Char5	
Term Begin Date	Term Begin Date for that Institution	Date	
Term Ending Date	Term End Date for that Institution	Date	
Term Begin Date + 14	Term Begin Date + 14 days for that Institution	Date	

Term End Date + 14	Term End Date + 14 days for that Institution	Date	
FTE Dist Amount	Displays the FTE distributed value for Employee/EmplRcd in Term	SNm14.6	Aggregate query round to 4 SNm7.4
Fund	Chart field Fund code associated to the FTE Distributed Amount	Char5	

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DataLink views used:

- SBMD.EMPLOYEE_BASE
- SBMD.PMIS_EMPLOYEE_JOB_STAGE
- SBMD.PMIS_EMPLOYEE_JOB_STAGE_TBL
- SBMD.PMIS_EMPLOYEE_JOB

PeopleSoft tables and fields used to determine inclusion:

- SYSADM_CS.PS_TERM_TBL
 - TERM_BEGIN_DT
 - TERM_END_DT
 - ACAD_CAREER
 - INSTITUTION
 - STRM
- SYSADM_HCM.PS_PAY_EARNINGS
 - EMPLID
 - EMPL_RCD
 - BUSINESS_UNIT
- SYSADM_HCM.PS_JOB
 - BUSINESS_UNIT
 - EFFDT
 - ACTION
 - HR_STATUS
 - FTE
 - EMPL_CLASS
- SYSADM_HCM.PS_CTC_JOB_DATA
 - CTC_JOB_TERM
- SYSADM_HCM.PS_CTC_EARNS_DIST
 - EMPLID
 - EMPL_RCD
 - EFFDT
 - FDM_COMBO_CD
 - ACCT_CD
- SYSADM_HCM.PS_VALID_COMBO_TBL

- FDM_COMBO_CD
 - SETID
 - EFFDT
- SYSADM_HCM.PS_JOBCODE_TBL
 - JOBCODE
 - SETID