

Sample Pivot Tables for the M_HR_EE_VALIDATION_DIST_PROMPT Query

Version 1.1 | January 17, 2019

The purpose of this document is to provide sample Excel pivot table configurations for the **M_HR_EE_VALIDATION_DIST_PROMPT** query in PeopleSoft HCM.

This job aid should be considered as **a resource to learn about your options** for analyzing your HCM data. It contains **examples only with sample data**. Some basic instructions are provided on pp.2-3. For more information about creating pivot tables, please refer to Excel help and online resources.

Query: M_HR_EE_VALIDATION_DIST_PROMPT (HR Employee Validation)

Field List:

A	Company	AA	Stnd Hrs/Wk	BA	Ben Record
B	ID	AB	FTE	BB	HR Status
C	Empl Record	AC	AM Accrual Hour	BC	Track
D	LN, FN	AD	Total Work Days	BD	Track Descr
E	Warrant Name	AE	Greater than 20	BE	Officer Cd
F	Additional Name	AF	CDays	BF	Reg/Temp Pos
G	Org Relation	AG	Reporter Type	BG	Union Code
H	Job EffDt	AH	Use Default	BH	Union Cd Descr
I	Job Effseq	AI	Time Period ID	BI	Labor Agreement
J	Pay Status	AJ	Elapsed Reporting Template	BJ	Category
K	Time Reporter Status	AK	Workgroup	BK	Start Date
L	Job Code	AL	Taskgroup	BL	Term Date
M	Jobcode Descr	AM	Schedule Grp		
N	Position	AN	Sched ID		
O	Posn Entry Dt	AO	Elig Fld 2		
P	Position Descr	AP	Elig Fld 4		
Q	Employee Type	AQ	Sal Plan		
R	Empl Class	AR	Grade		
S	Reg/Temp	AS	Grade Date		
T	Reports To	AT	Step		
U	Dept ID	AU	Step Date		
V	Dept Descr	AV	Hol Sched		
W	Location	AW	Job Indicator		
X	Loc Descr	AX	Absence System		
Y	Pay Group	AY	Absence Mgmt Pay Group		
Z	Full/Part	AZ	Comp Freq		

Roles with access to this query: M_HR_SPECIALIST, M_HR_SPECIALIST_RDO, M_PAYROLL_ADMINISTRATOR, M_PAYROLL_ADMINISTRATOR_RDO, M_PAYROLL_CBO, M_PAYROLL_CBO_RDO, M_WORKERSCOMP_ADMIN.

Pivot Table Basics

For instruction on pivot tables, please refer to online resources, like:

Excel Easy - Pivot Tables

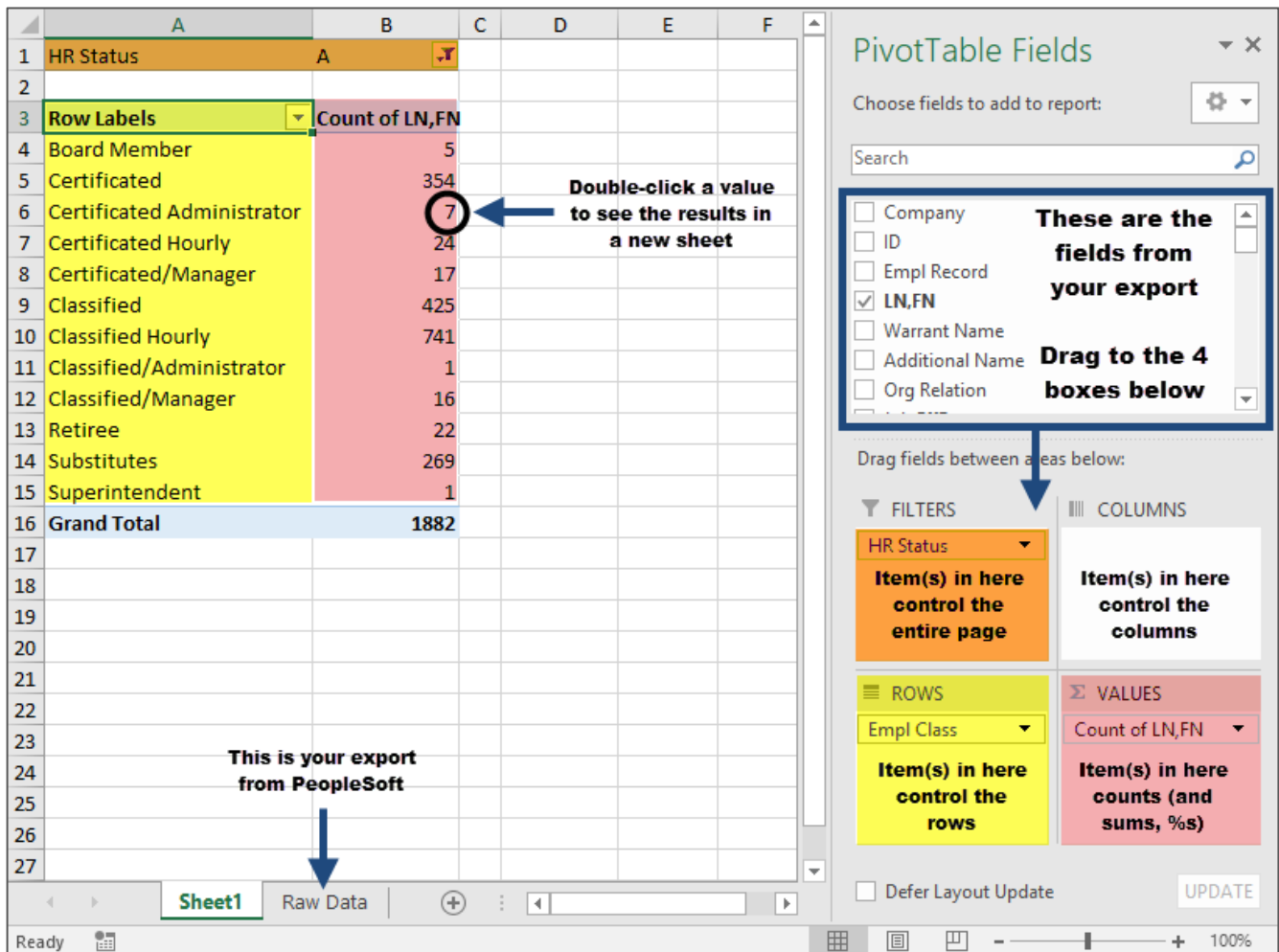
<https://www.excel-easy.com/data-analysis/pivot-tables.html>

Microsoft - Create a PivotTable to analyze worksheet data

<https://support.office.com/en-gb/article/create-a-pivottable-to-analyze-worksheet-data-a9a84538-bfe9-40a9-a8e9-f99134456576>

Components of a Pivot Table

From Easy Excel: "Pivot tables are one of Excel's most powerful features. A pivot table allows you to extract the significance from a large, detailed data set."



HR Status	Count of LN, FN
Board Member	5
Certificated	354
Certificated Administrator	7
Certificated Hourly	24
Certificated/Manager	17
Classified	425
Classified Hourly	741
Classified/Administrator	1
Classified/Manager	16
Retiree	22
Substitutes	269
Superintendent	1
Grand Total	1882

NOTE: Columns were not used in this pivot table.

Directions

For the purpose of this job aid, here are some pivot table basics to get you started:

1. Run your PeopleSoft query, like **M_HR_EE_VALIDATION_DIST_PROMPT**, and export to Excel.
2. Click **Enable Editing**. Delete Row 1 (total # of records).
3. You might want to change the name of the worksheet from “**Sheet1**” to “**Raw Data**” or something similar. This will help you later when you create your pivot table on a separate tab.
4. Always review the data so you understand what you’re working with. What are the column headers (fields)? What information does this query provide?
5. **Now let’s create a pivot table...**Make sure your cursor is in a cell *within your dataset* (like Cell A1 or D10, for example, as long as it’s within your dataset, and not outside of it in a blank column).
6. Go to **Insert > Pivot Table**. In the window that pops up, click **OK**.
7. You will see a new sheet (like Sheet1) with a blank pivot table. Your raw data is still on the other tab. You’re off to a great start! Now just populate your pivot table.
8. Let’s do a basic pivot table with rows and counts:
 - a. In the list of fields on the right, find **Empl Clss** (this is Column R, so it will be the 18th one in the list). Drag Empl Clss to the **ROWS** box. You should see a list of Empl Clss (Certificated, Classified, Retiree, etc.) appear on the screen as rows.
 - b. Let’s make it count by something. Find **LN, FN** (Column D, 4th in the list). Drag this to the **VALUES** box. Now you have counts for each Empl Class.
9. Now let’s add a little more – remember, in this query your raw data includes *all employees*, including Inactive. Let’s make this pivot table reflect Active employees only. Find **HR Status** (Column BB, 54th in the list). You have a couple of options:
 - a. Drag **HR Status** to the **COLUMNS** box. You will now see “A” and “I” columns appear on your pivot table.
 - b. Drag **HR Status** out of the **COLUMNS** box and into the **FILTERS** box. Notice now it says “(All)” at the top of the page. You can filter the pivot table by A or I.
 - c. What happens when you drag **HR Status** out of **FILTERS** and add it to **ROWS** (under Empl Clss)? Try it! *It provides A and I for each Empl Clss.*
 - d. What happens when you drag **HR Status** out of **ROWS** and back to the field list? Try it! *It is removed from the pivot table altogether.*
10. Repeat Step 9b. Add **HR Status** as a **FILTER**. Select “A” to return only Active employees.

You made a pivot table!

BONUS QUESTION: What happens when you double-click a value in your pivot table? (A new sheet is created with “the results.” How handy!)

This job aid introduces some additional steps you can take to help you view your data: Change the style (colors/lines), add percentages next to the counts, sort the results, and apply conditional formatting. There are so many other things you can do, like change the report layout (compact, outline or tabular), remove subtotals/grand totals, create pivot charts, and more. Please refer to online resources to learn more.

For Reviewing Job Data

NOTE: With this query, remember that employees with multiple Empl Records will count more than once. In other words, the grand totals are total Empl Records (not total Employees).

By Empl Class

How many active Classified, Certificated, Retiree, etc.?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Empl Class
- In this example, a percentage column was added and counts were sorted descending to show the greatest at the top.

2	HR Status	A	
3			
4	Empl Class	Count	%
5	Classified Hourly	741	39.4%
6	Classified	425	22.6%
7	Certificated	354	18.8%
8	Substitutes	269	14.3%
9	Certificated Hourly	24	1.3%
10	Retiree	22	1.2%
11	Certificated/Manager	17	0.9%
12	Classified/Manager	16	0.9%
13	Certificated Administrator	7	0.4%
14	Board Member	5	0.3%
15	Superintendent	1	0.1%
16	Classified/Administrator	1	0.1%
17	Grand Total	1882	100.0%

TIP: Quick steps to add percentage column to your pivot table results:

1. In the Values box, add something to count by, like "LN,FN." This gives you the first column with counts.
2. Add LN,FN again so it shows a second column on your pivot table. This will become your percentages.

3	Row Labels	Count of LN,FN	Count of LN,FN2
4	Board Member	5	5
5	Certificated	468	468

3. Right-click a value in the second column and select Show Values As = % of Grand Total.

<ul style="list-style-type: none"> ✓ No Calculation % of Grand Total % of Column Total % of Row Total % Of...

Add Employee Names to a Pivot Table

In this example, the question is: For each Empl Class, which location are they at and who are they?

Add LN, FN to your pivot table to display employee names.

- **Filters:** HR Status (Filtered to Active). Empl Class (filter to Certificated/Manager in this example)
- **Rows:** Loc Descr, LNFN
- In this example, the names are scrambled because we are using fake data.

	A	B
1	HR Status	A
2	Empl Class	Certificated/Manager
3		
4	Location/Name	Count
5	CAJON PARK SCHOOL	1
6	Qzyxztyeqxrounl,Loldtliwbwco	1
7	CARLTON HILLS SCHOOL	2
8	Eamufebbccdrnje,Djxuzitgxxaz	1
9	Lioizklfwyngcx,Tzjjkqfvavry	1
10	CARLTON OAKS SCHOOL	1
11	Bhsvsuqtekuggny,Dqagmgmwszlz	1
12	CHET F. HARRITT SCHOOL	1
13	Ffqrghaeawkhrf,Wbarexgfbiyt	1
14	EDUCATIONAL RESOURCE CENTER	1
15	Zljbuzykvihiody,Lcywjmorogry	1
16	HILLCREEK SCHOOL	2
17	Ivjzyapqixpetyq,Ylmjwkprmsn	1
18	Sowdrxyhiwoxeud,Uhyhqzoosurj	1
19	HUMAN RESOURCES/PUPIL SERVICES	1
20	Prtrkxyprhvyesp,Xzwxikdcnbrj	1
21	PEPPER DRIVE SCHOOL	2
22	Ahgelflnzsqpszc,Jrafhgmhuaux	1
23	Kuxrgnntqbpuyvr,Cbqjplknjery	1

Full Time / Part Time

How many Daily, Hourly, FT, and PT?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Full/Part
- In this example, a percentage column was added.

2	HR Status	A	
3			
4	Full Time/Part Time	Count	%
5	Daily	288	15.3%
6	Full-Time 10 months	210	11.2%
7	Full-Time 11 months	137	7.3%
8	Full-Time 12 months	107	5.7%
9	Hourly	769	40.9%
10	Part-Time 10 months	283	15.0%
11	Part-Time 11 months	25	1.3%
12	Part-Time 12 months	63	3.3%
13	Grand Total	1882	100.0%

Full Time/Part Time by Comp Freq

How many Daily, Hourly, FT, and PT by Comp Freq, broken down by Empl Class?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Full/Part, Empl Class
- **Columns:** Comp Freq
- In this example, the PivotTable Style was changed to show lines and grey stripes (Design tab > Pivot Style Light 8).

2	HR Status	A					
3							
4	FTPT by Comp Freq	Comp Freq					
5	Full Time/Part Time	D	H	M	MTH10	MTH11	Grand Total
6	☒ Daily	288					288
7	Certificated Hourly	5					5
8	Retiree	14					14
9	Substitutes	269					269
10	☒ Full-Time 10 months			7	203		210
11	Certificated				203		203
12	Classified			7			7
13	☒ Full-Time 11 months			4		133	137
14	Certificated					132	132
15	Certificated/Manager					1	1
16	Classified			4			4
17	☒ Full-Time 12 months			107			107
18	Board Member			5			5

Pay Status by HR Status

Does Pay Status align with HR Status? Can use to verify status of LOAs and SWB.

- **Rows:** Pay Status
- **Columns:** HR Status

3	Pay Status/HR Status	HR Status		
4	Pay Status	A	I	Grand Total
5	Active	1865		1865
6	Deceased		4	4
7	Leave of Absence	17		17
8	Retired With Pay		8	8
9	Terminated		619	619
10	Grand Total	1882	631	2513

Grade and Step

By Empl Class, how many at each Grade/Step?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Empl Class, Grade, Step
- In this example, the PivotTable Style was changed to show lines and grey stripes (Design tab > Pivot Style Light 8).

	A	B
1	HR Status	A
2		
3	Empl Class/Grade/Step	Count
4	Board Member	5
5	001	5
6	1	5
7	Certificated	354
8	001	3
9	3	1
10	6	2
11	003	32
12	1	10
13	2	5
14	3	1
15	4	2
16	5	3
17	6	2

Retirement Coding (Elig Flds 2 and 4)

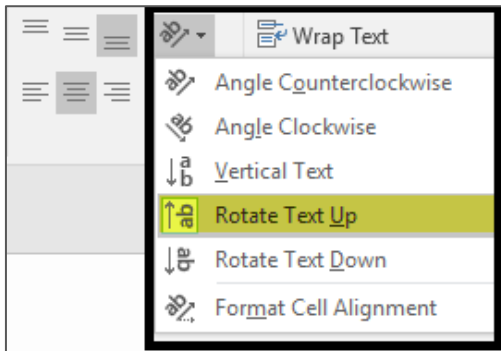
Does Elig Fld 2 align with Elig Fld 4?

- **Filters:** HR Status (Filtered to Active), Empl Class
- **Rows:** Elig Fld 2
- **Columns:** Elig Fld 4
- In this example, the PivotTable Style was changed to show lines (Design tab > Pivot Style Light 8). The column headers were rotated so the columns could be reduced in size for better readability. By adding Empl Class as a page filter, you can change the Empl Class (Classified Hourly, for example) to change the results on the pivot table.

	A	B	C	D	E	F	G	H	I	J	K	L
1	HR Status	A										
2	Empl Class	(All)										
3												
4	Elig Fld 2 vs 4	Elig F										
5	Elig Fld 2	EXCLUDED	PEPRAP-NM	PEPRAP-OT	PEPRAS-NM	PERS-NM	PERS-OT	PERS-RET	STRS-NM	STRS-RET	(blank)	Grand Total
6	32ARS	3	409	2	22	20	2		3		53	514
7	PEPRAP										320	320
8	PEPRAS				1						205	206
9	PERS										299	299
10	STRS										422	422
11	(blank)	2	47	9		1	15	11		34	2	121
12	Grand Total	5	456	11	23	21	17	11	3	34	1301	1882

TIP: Quick steps to turn column headers sideways:

1. Highlight the column headers (like EXCLUDED, PEPRAP-NM, etc.).
2. On the Home tab, click the Orientation button (the one with “ab” and an arrow) and select “Rotate Text Up.”



Workgroup/Taskgroup

By Workgroup, which Taskgroups?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Workgroup
- **Columns:** Taskgroup

2	HR Status	A				
3						
4	By Workgroup	Taskgroup				
5	Workgroup	32-SUB-TEA	POSPAY	SDCOE	(blank)	Grand Total
6	32-BOARD			5		5
7	32-CER-ADM			5		5
8	32-CER-ANN		1	348		349
9	32-CER-DLY		123			123
10	32-CER-HLY		22	1		23
11	32-CER-MGT			19		19
12	32-CER-RRT		1	3		4
13	32-CLA-ADM			1		1
14	32-CLA-ANN		1	423		424
15	32-CLA-HLY		561	178		739
16	32-CLA-MGT			17		17
17	32-CLA-RRT			4		4
18	32-SUB-TEA	155	8			163
19	32-SUPT			1		1
20	(blank)					
21	Grand Total	155	717	1005		1877

For Reviewing Position

Locations

How many active Empl Records by Location?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Loc Descr
- In this example, a percentage column was added.

2	HR Status	A	
3			
4	By Location	Count	%
5	BOARD OF EDUCATION	5	0.3%
6	BUSINESS SERVICES	25	1.3%
7	CAJON PARK SCHOOL	102	5.4%
8	CARLTON HILLS SCHOOL	78	4.1%
9	CARLTON OAKS SCHOOL	80	4.3%
10	CHET F. HARRITT SCHOOL	61	3.2%
11	CHILD NUTRITION SERVICES	14	0.7%
12	DISTRICT WIDE CLEARING	892	47.4%
13	EDUCATIONAL RESOURCE CENTER	19	1.0%
14	HILLCREEK SCHOOL	76	4.0%
15	HUMAN RESOURCES/PUPIL SERVICES	14	0.7%
16	MAINTENANCE & OPERATIONS	34	1.8%
17	OUT-OF-SCHOOL TIME PROGRAMS	134	7.1%
18	PEPPER DRIVE SCHOOL	80	4.3%
19	PRIDE ACADEMY AT PROSPECT AVEN	64	3.4%
20	RIO SECO SCHOOL	86	4.6%
21	SPECIAL EDUCATION	16	0.9%
22	SUPERINTENDENT'S OFFICE	2	0.1%
23	SYCAMORE CANYON SCHOOL	67	3.6%
24	TECHNOLOGY & COMMUNICATION SER	12	0.6%
25	TRANSPORTATION	21	1.1%
26	Grand Total	1882	100.0%

Position Departments and Locations

By Department, how many active Empl Records at each Location?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Dept Descr
- **Columns:** Loc Descr
- In this example, the PivotTable Style was changed to show lines (Design tab > Pivot Style Light 8). The column headers were rotated so the columns could be reduced in size for better readability.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
2	HR Status	A																					
3																							
4	Count	Lo																					
5	Department	BOARD OF EDUCATION	BUSINESS SERVICES	CAJON PARK SCHOOL	CARLTON HILLS SCHOOL	CARLTON OAKS SCHOOL	CHET F. HARRITT SCHOOL	CHILD NUTRITION SERVICES	DISTRICT WIDE CLEARING	EDUCATIONAL RESOURCE CENTER	HILL CREEK SCHOOL	HUMAN RESOURCES/PUPIL SERVICES	MAINTENANCE & OPERATIONS	OUT-OF-SCHOOL TIME PROGRAMS	PEPPER DRIVE SCHOOL	PRIDE ACADEMY AT PROSPECT AVEN	RIO SECO SCHOOL	SPECIAL EDUCATION	SUPERINTENDENT'S OFFICE	SYCAMORE CANYON SCHOOL	TECHNOLOGY & COMMUNICATION SER	TRANSPORTATION	Grand Total
6	Salaries And Benefits	5	21	88	61	72	49		519	16	61	10	34		69	44	73	16	2	50	12	21	1223
7	Project Safe		1	7	11	5	5				10				132	3	7	8		11			200
8	Central Kitchen			4	2	3	4	14	124		3				6	3	2			3			168
9	Summer School			3					68								1						73

Location and Reports To Positions

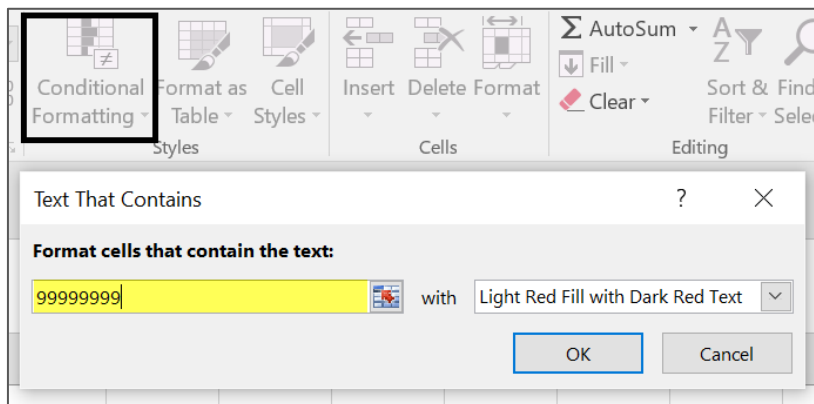
By Location, which Reports To Positions?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Loc Descr, Reports To
- In this example, Conditional Formatting was applied to Column A to highlight 99999999 (Text That Contains '99999999' = Red).

	A	B
1		
2	HR Status	A
3		
4	Location/Reports To	Count
5	BOARD OF EDUCATION	5
6	99999999	5
7	BUSINESS SERVICES	25
8	99999999	15
9	10323012	9
10	10323011	1
11	CAJON PARK SCHOOL	102
12	10323507	84
13	10328230	7
14	10328130	4
15	10323032	3
16	30001917	2
17	10323035	1

TIP: Quick steps to highlight cells red (Conditional Formatting):

1. In this example, highlight Column A:
2. On the Home tab, click Conditional Formatting > Highlight Cells Rules and in this example "Text that Contains..."
3. Enter **99999999** (and leave "Light Red Fill with Dark Red Text"). Click OK.



FTE and Standard Hours

For each FTE, how are Standard Hours set up?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** FTE, Stnd Hrs/Wk
- In this screenshot, FTE was filtered to only show 0.0 and 1.0 (to truncate the image).

	A	B
1	HR Status	A
2		
3	FTE/Standard Hours	Count
4	0.000000	1057
5	40.00	1
6	5.00	285
7	1.00	771
8	1.000000	453
9	40.00	115
10	32.50	337
11	30.00	1
12	Grand Total	1510

Job Codes and Positions

By Job Code, which Positions?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Jobcode Descr, Job Code, Position Descr
- In this example, the results are sorted by Job Code (descending) and then Position (descending) to put the greatest counts at the top.

	A	B
2	HR Status	A
3		
4	Job Code / Position	Count
5	Substitute Teacher	285
6	11220	285
7	Substitute Teacher	285
8	Teacher	274
9	11300	274
10	Teacher	253
11	Sai Teacher	6
12	Eak Teacher	5
13	Intervention Resource Teacher	3
14	School Counselor	1
15	Language, Speech & Hearing	1
16	Sdc-Teacher	1
17	SAI - RSP Teacher	1
18	Transitional Kinder Teacher	1

CDAYS

By Position, which CDAYS?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Position Descr
- **Columns:** CDays
- In this example, the PivotTable Style was changed to show lines (Design tab > Pivot Style Light 8).

2	HR Status	A						
3								
4	Positions and CDAYS	CDAYS						Grand
5	Position	185.00	200.00	204.00	214.00	224.00	245.00	Total
6	Adapted Pe Teacher	2						2
7	Admin Intern	1						1
8	Alt School Teacher	2						2
9	Asst Supt Ed Ser						1	1
10	Ast Supt Hr/Pup Sv						1	1
11	Certificated Consultant	5						5
12	Certificated Consultant Hrly		12					12
13	Coord Pupil Serv		1					1
14	Curr Res Teacher	4						4
15	Dir I Curr & Asmnt				1			1
16	Director - Assess and Learning				1			1
17	Director, Instructional Tech				1			1
18	Director, Spec Ed					1		1
19	District Nurse	1						1

Union Code

By Empl Class, which Union Code?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Empl Class
- **Columns:** Union Cd Descr
- In this example, the PivotTable Style was changed to show lines (Design tab > Pivot Style Light 8).

	A	B	C	D	E
1	HR Status	A			
2					
3	Count	Union Code			
4	Empl Class	032 CSEA Chapter 557	032 Santee Teachers Assoc	(blank)	Grand Total
5	Board Member			5	5
6	Certificated		348	6	354
7	Certificated Administrator			7	7
8	Certificated Hourly		9	15	24
9	Certificated/Manager		1	16	17
10	Classified	424		1	425
11	Classified Hourly	96		645	741
12	Classified/Administrator			1	1
13	Classified/Manager			16	16
14	Retiree	1		21	22
15	Substitutes			269	269

Other

Assigned Work Schedule

For each Schedule ID, which Schedule Group?

- **Filters:** HR Status (Filtered to Active)
- **Rows:** Sched ID
- **Columns:** Schedule Grp
- In this example, the PivotTable Style was changed to show lines (Design tab > Pivot Style Light 8). Conditional Formatting was applied to Column C to highlight any “SDCOE” Schedule Groups (Greater Than ‘0’ = Red).

	A	B	C	D
1	HR Status	A		
2				
3	Count	Schedule Group		
4	Schedule ID	03200	SDCOE	Grand Total
5	M-F0.5	2		2
6	M-F1	1		1
7	M-F1.25	3		3
8	M-F1.5	1		1
9	M-F1.75	1		1
10	M-F2	42		42
11	M-F2.5	15		15
12	M-F2.75	8		8
13	M-F3	24		24
14	M-F3.25	10		10
15	M-F3.5	36	1	37
16	M-F3.75	31	1	32
17	M-F3.92	4		4