

**USER-DEFINED  
REPORTS**

**Training Guide  
& Reference**



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Office of Human Resources

HR Systems  
September 9, 2005

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## ABOUT THIS DOCUMENT

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Hillsborough Community College, Gwendolyn Stephenson, President
- Purpose:* This document is intended to serve as a guide for learning how to generate user-defined reports, as a quick refresher and checklist for users, as a reference for programmers or developers making modifications or enhancements, and as a resource for those desiring information about the HR Custom Reports
- Target Audience:* Human resources personnel, deans, directors and their administrative support staff, and others with access to the college's administrative computer network, the Colleague (R17) application, and the HR Custom Reports menus.
- Copyright:* Copyright © 2003 - 2005 by Jerry L. Inman. All rights reserved. This document may be used without fee for non-commercial use by any student, faculty, and/or staff of academic institutions.
- This document is maintained in sections, each with its own date, which is shown at the bottom of each page. When revised, only those sections that have been changed will carry a new date. Those sections that have no changes will continue to show the date written or last changed.

For the most part, reports from HR Custom Reports are preset, i.e, the composition of data and the layout are set by the programmer. Some flexibility exists in that the user may set criteria which data must meet to be included in the report, and the user may select certain prescribed sort orders for the data. The user pretty much has to find a report with the data he/she needs and disregard any other data that comes along with the report.

User defined reports offer the user the opportunity to create reports containing data from the fields they want, in the layout they want, with the data in the order they want.

To build a report the user makes up to four selections from a list of up to 40 or more of the most often used fields in the datafile. The selections represent columns – the order in which they are selected is the order in which they appear on the report. For example: if the user chooses Dept ID then Primary Category, then Name, then Campus ID, the first column would be Dept ID, the 2<sup>nd</sup>, Primary Category, the 3<sup>rd</sup> Name, and the last Campus.

The reports require a saved list and the order in which IDs occur in that saved list is the same order in which the data appears on the report. So, by sorting the saved list, the user sorts the report.

The user-defined saved list sorter offers the user the opportunity to sort saved lists in any way he/she wants. To sort a saved list the user makes up to four selections from a list of 40 or more of the most often used fields in the datafile. The selections represent sort sequences. For example if the user chooses Dept ID, then Primary Category, then Name the saved list will be sorted first by Dept ID, then within each Dept ID by Primary Category, then within each Primary Category by Name.

#### Steps to generate a user-defined report

1. **Create a saved list.** This may be accomplished using a standard saved list builder or even at the colon prompt.
2. **Sort the saved list** in the order you would like the data to appear on the report. Some standard saved list sorters may already be set to arrange the data in the way you want, but the user-defined saved list sorter is particularly useful here.
3. **Build the report** by selecting fields in the same order as the saved list is sorted. This will put the major sort at the left most column.

# User-Defined Reports Menu

User defined reports have been developed for the following files

```
OHR|OTH|UDR          DPT|LST|UDR
User Defined Reports

  1. From HRPER file.   (Basic, Faculty-Related, Admntr-Related)

  2. From POSITION file. (Basic, Pay/Financial-Related)

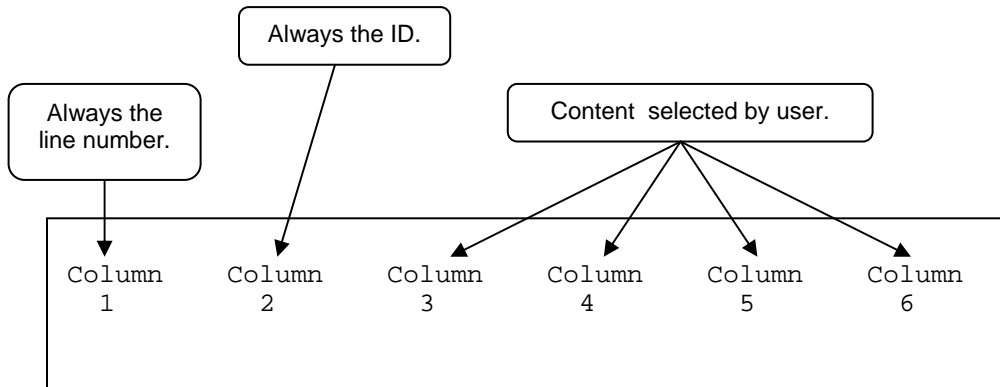
  3. From H20.CLASSIFICATIONS file.

  4. From BENDED file.  (Benefits & Deductions)

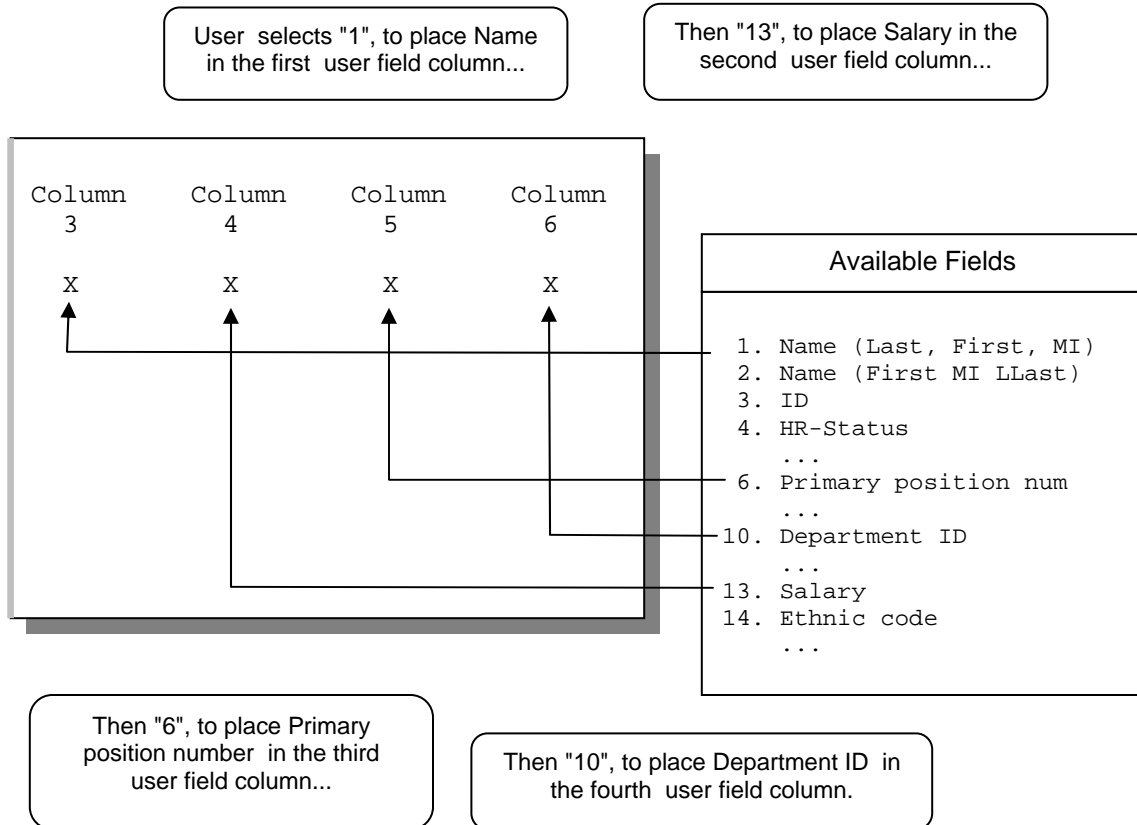
  ? Help
[Enter] to Quit

=====
Choice->
```

Regardless of the reporting file, all of the user-defined reports have a similar layout



And all user-defined reports are composed in a similar manner. This example is using the HRPER file.



**Tip** It is generally good practice to sort the saved list into the same order of columns that will appear on the user-defined report.

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this page has been intentionally left blank.

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## Section 2. *User-Defined Operations on the HRPER File*

---

From this menu the user may navigate to HRP saved list builders, the sort utility and the report itself.

```
OHR|OTH|UDR|HRP          DPT|LST|UDR|HRP
User Defined Reports from HRPER file.

  1. Create HRP saved list
  2. Sort HRP saved list
  3. HRP report
  ? Help

[Enter] to Quit

=====
Choice->
```

Option 1 takes the user to the a saved list builder menu where HRP saved list lists may be created in various ways. For user-defined report purposes, any HRP saved list will work, regardless of how or where it was created. See the Introduction to HR Custom Reports Training Guide and Reference for detailed information on building saved lists.

## User-Defined HRP Saved List Sorter

This saved list sorter works on any HRPER saved list. It allows the user to sort a list on the same fields that may be placed on the user-defined HRP report.

```
Process: Sort HRP saved list                                (P.SORT.HRP)

Descr.: User enters HRP saved list name then selects up to four fields
        (below), in any order, by which to sort the list. This allows
        2,686,320 possible sort combinations.

1st FT Appt Date      Dept ID          GL-Dept          Pos short title
1st Hire Date         Email Address   GL-Dept Desc/Progr Position nbr
Adm Contr Len Desc   Ethnic Code     HR-status code   Primary category
Adm Contract Len     Fac Contract Desc ID              Salary (hi to lo)
Age                  Fac FTR Appt Date Marital Status   Salary (lo to hi)
Bargaining Unit     Fac FTT Appt Date Name (FMI.L)     Sex
Cabinet Mbr Flag    Fac Grade       Name (L,FM)      Tenure code
Campus ID            Fac Rank        Occup Activ code Tenure desc
Campus Name          Fac Rank Desc   Pos Class Code   Tenure Date
Degree Level         FRS SMS Flag    Pos Class Title
Department Name      GL Fund type    Pos Long title
=====

Name of HRP saved list to be sorted ([Enter] to cancel).
: hrp.temp
50 records retrieved to list 0.
Press any key to continue...
```

To start, the user enters the name of an HRP saved list. If a saved list by that name exists, its count will be reported, otherwise the user will be advised that it cannot be found.

**Caution!** Use only an HRP saved list. If you enter the name of an existing saved list created on any other file, POSITION for example, it will be opened but error messages will appear when sorting begins

```

Process: Sort HRP saved list                Field List A                (P.SORT.HRP)

Descr..: Make up to 4 selections, pressing [Enter] after each.

  1. 1st FT Appt Date          9. Campus Name              17. Fac FTT Appt Date
  2. 1st Hire Date            10. Degree Level           18. Fac Grade
  3. Adm Contr Len Desc       11. Department Name       19. Fac Rank
  4. Adm Contract Length     12. Dept ID               20. Fac Rank Desc
  5. Age                      13. Email Address         -----
  6. Bargaining Unit         14. Ethnic Code           00. Go to List B
  7. Cabinet Mbr Flag        15. Fac Contract Desc     99. Done! No more picks
  8. Campus ID               16. Fac FTR Appt Date    <Enter> Cancel

-----
1st Sort-
2nd Sort-
3rd Sort-
4th Sort-
=====

Choice->

```

After a saved list has been identified, the user is presented with a list of 20 fields (List A). Selecting "00" causes another 22 fields (List B) to be presented. The user may toggle between these two lists at any time.

```

Process: Sort HRP saved list                Field List B                (P.SORT.HRP)

Descr..: Choose up to 4 fields from list pressing [Enter] after each.

 21. FRS SMS Flag            30. Occup Activ Code       39. Sex
 22. GL Fund type           31. Pos Class Code         40. Tenure Code
 23. GL-Dept                32. Pos Class Title       41. Tenure Desc
 24. GL-Dept Desc/Progr     33. Pos Long Title        42. Tenure Date
 25. HR-status code         34. Pos Short Title       -----
 26. ID                    35. Position Nbr         00. Go to List A
 27. Marital Status         36. Primary Category      99. Done! No more picks
 28. Name (First MI Last)   37. Salary (hi to lo)
 29. Name (Last,First,MI)   38. Salary (lo to hi)    <Enter> Cancel

-----
1st Sort-
2nd Sort-
3rd Sort-
4th Sort-
=====

Choice->

```

The user is prompted to select any of the available fields as the first sort. The user enters the number of the desired field. In this example option 8, representing Campus ID (location) has been selected. That field name is then displayed and the user is prompted for another pick.

```
-----  
1ST SORT- BY H20.HRP.POS.LOC.ID  
2ND SORT-  
3RD SORT-  
4TH SORT-  
=====
```

Choice->



Sometimes it is necessary to select List B twice before it activates. Also, selecting a field from List B will sometimes cause List A to be re-displayed automatically without the user entering "00".

The user then selects another field as the second sort. Here, Dept ID has been selected.

```
-----  
1ST SORT- BY H20.HRP.POS.LOC.ID  
2ND SORT- BY HRP.PRI.DEPT  
3RD SORT-  
4TH SORT-  
=====
```

Choice->

The user then selects another field as the third sort. Here, Primary Category (from List B) has been selected.

```
-----  
1ST SORT- BY H20.HRP.POS.LOC.ID  
2ND SORT- BY HRP.PRI.DEPT  
3RD SORT- BY H20.HRP.PRI.CATEGORY  
4TH SORT-  
=====
```

Choice->

The user then selects another field as the fourth sort. Here, Name (from List B) has been selected.

```
-----  
1ST SORT- BY H20.HRP.POS.LOC.ID  
2ND SORT- BY HRP.PRI.DEPT  
3RD SORT- BY H20.HRP.PRI.CATEGORY  
4TH SORT- BY HRP.LFM.NAME  
-----  
  
Thank you. Please wait...  
50 records retrieved to list 0.  
  
RSMITH.HRP.TEMP has been resorted. Press any key to continue...
```

After the last desired sort field has been selected the user enters "99" indicating no more picks are to be made. The saved list sorting automatically begins and the user is advised when it is finished. The sorting process is complete and the screen can be exited.

### Using fewer than four sorts.

If only one, two, or three sorts are desired the "Done" option (99) may be selected in lieu of another field. This tells the program to start the sort with just the fields already selected.

### Canceling.

Pressing <Enter> at any Choice-> prompt will cause the sort to be cancelled and the screen exited. In case the user has pressed <Enter> by mistake and really does not intend to abort, the following prompt is displayed.

Do you really want to cancel? [Y]/N:

The default value here is "Y", as indicated by the bracket, so if the user wants to exit, pressing <Enter> again, or entering "Y" will end the process.

If the user wants to continue the process entering "N" or "n" will take the user back with all the selected fields still in place.



**Tip** It is generally good practice to sort the data in the same order of columns that will appear on the user-defined report.



**Tip** The ID identifies an employee position right down to the individual HRPER record. After the ID is picked as a sort field any remaining sort picks will have no effect.

## User-Defined HRP Report (R.UD.HRP)

This report generator works on any HRPER saved list. It allows the user to select up to four fields to be shown on the report. The screen lists the same fields as seen on the saved list sorter except for ID which is automatically included in any report created.

```
Report: User-defined HRPER Data Report (R.UDR.HRP.2)

Descr.: Column 1 is always the line number and column 2 is always the ID. User
may select up to four more fields from lists below. Order of columns 3
thru 6 is determined by sequence that fields are selected. Data order
is determined by saved list (required) which should be sorted prior
to running report.

1st FT Appt Date   Bargaining Unit   Department Name   Fac FTR Appt Date
1st Hire Date     Cabinet Mbr Flag  Dept ID           Fac FTT Appt Date
Adm Contr Len Desc Campus ID         Email Address     Fac Grade
Adm Contract Len  Campus Name      Ethnic Code       Fac Rank
Age               Degree Level     Fac Contract Desc Fac Rank Desc
-----
FRS SMS Flag      Marital Status   Pos Class Title   Salary
GL Fund Type      Name (FMI,L)     Pos Long Title    Sex
GL-Dept           Name (L,FM)      Pos Short Title   Tenure Code
GL-Dept Desc/Progr Occup Activ Code Position Nbr       Tenure Desc
HR-status Code    Pos Class Code   Primary Category  Tenure Date
=====
Name of HRP saved list to be used ([Enter] to cancel).
: HRP.TEMP

50 records retrieved to list 0.
Press any key to continue...
```

To start, the user enters the name of an HRP saved list. If a saved list by that name exists, its count will be reported, otherwise the user will be advised that it cannot be found.

**Caution!** Use only an HRP saved list. If you enter the name of an existing saved list created on any other file, POSITION for example, it will be opened but it will NOT work. Error messages or long lists of IDs may appear on screen or on the printed report.

```

Report: User-defined HRP Data Report      Field List A      (R.UD.HRP)

Desc..: Choose up to 4 fields from list, pressing [Enter] after each.

1. 1st FT Appt Date          9. Campus Name          17. Fac FTT Appt Date
2. 1st Hire Date            10. Degree Level        18. Fac Grade
3. Adm Contr Len Desc       11. Department Name     19. Fac Rank
4. Adm Contract Length     12. Dept ID             20. Fac Rank Desc
5. Age                      13. Email Address       -----
6. Bargaining Unit         14. Ethnic Code         00. Go to List B
7. Cabinet Mbr Flag        15. Fac Contract Desc   99. Done! No more picks
8. Campus ID               16. Fac FTR Appt Date  <Enter> Cancel
-----
Col 2- @ID FMT '7L' COL.HDG 'ID'
Col 3-
Col 4-
Col 5-
Col 6-
=====
Choice->

```

After a saved list has been identified, the user is presented with a list of 20 fields (List A). Selecting "00" causes another 20 fields (List B) to be presented. The user may toggle between these two lists at any time.

```

Report: User-defined HRP Data Report      Field List B      (R.UD.HRP)

Desc..: Choose up to 4 fields from list, pressing [Enter] after each.

21. FRS SMS Flag           29. Occup Activ Code    37. Sex
22. GL Fund type           30. Pos Class Code      38. Tenure Code
23. GL-Dept                31. Pos Class Title     39. Tenure Desc
24. GL-Dept Desc/Progr    32. Pos Long Title      40. Tenure Date
25. HR-status code        33. Pos Short Title     -----
26. Marital Status        34. Position Nbr       00. Go to List A
27. Name (First MI Last)  35. Primary Category    99. Done! No more picks
28. Name (Last,First,Mid) 36. Salary              <Enter> Cancel
-----
Col 2- @ID FMT '7L' COL.HDG 'ID'
Col 3-
Col 4-
Col 5-
Col 6-
=====
Choice->

```

After a saved list has been identified, the user is prompted to select any of 40 fields for the first column. The user enters the number of the desired field. In this example option 8 (from List A) representing Campus ID (or location) has been selected. That field name is then displayed and the user is prompted for another pick.

```
-----  
Col 2- @ID FMT '7L' COL.HDG 'ID'  
Col 3- H20.HRP.POS.LOC.ID FMT '4L' COL.HDG 'Locn'  
Col 4-  
Col 5-  
Col 6-  
=====
```

Choice->

The user then selects another field for column 4. Here, Dept ID (from List A) has been selected.

```
-----  
Col 2- @ID FMT '7L' COL.HDG 'ID'  
Col 3- H20.HRP.POS.LOC.ID FMT '4L' COL.HDG 'Locn'  
Col 4- HRP.PRI.DEPT COL.HDG 'Dept'  
Col 5-  
Col 6-  
=====
```

Choice->

The user then selects another field for column 5. Here, Primary Category (from List B) has been selected.

```
-----  
Col 2- @ID FMT '7L' COL.HDG 'ID'  
Col 3- H20.HRP.POS.LOC.ID FMT '4L' COL.HDG 'Locn'  
Col 4- HRP.PRI.DEPT COL.HDG 'Dept'  
Col 5- H20.HRP.PRI.CATEGORY  
Col 6-  
=====
```

Choice->

The user then selects another field for column 6. Here, Name (from List B) has been selected.

```
-----  
Col 2- @ID FMT '7L' COL.HDG 'ID'  
Col 3- H20.HRP.POS.LOC.ID FMT '4L' COL.HDG 'Loen'  
Col 4- HRP.PRI.DEPT COL.HDG 'Dept'  
Col 5- H20.HRP.PRI.CATEGORY  
Col 6- HRP.LFM.NAME FMT '25T'  
-----  
Choice-> 99
```

"99" is then entered which takes the user to the Directing Output screen where the report may be sent to the screen, a printer or the HOLD file as a .dif or .txt file.

### Canceling.

Pressing <Enter> at any Choice-> prompt will cause the field selection to be cancelled and the screen exited. In case the user has pressed <Enter> by mistake and really does not intend to abort, the following prompt is displayed.

Do you really want to cancel? [Y]/N:

The default value here is "Y", as indicated by the bracket, so if the user wants to exit, pressing <Enter> again, or entering "Y" will end the process.

If the user wants to continue the process entering "N" or "n" will take the user back with all the selected fields still in place.

When the last desired field has been selected the user enters "99" indicating that there are no more picks to be made. This may be after the first, second, third, or fourth pick. See the "Directing Output" section below for more information.

## Directing Output

After all the desired fields have been selected, the composition of the report, as defined by the user, is displayed and the user is prompted for a destination. This step is the same regardless of the file being used.

```
Report: User-defined HRPER Data Report (R.UD.HRP)

Composition has been defined.

Col 2- @ID FMT '7L' COL.HDG 'ID'
Col 3- H20.HRP.POS.LOC.ID FMT '4L' COL.HDG 'Locn'
Col 4- HRP.PRI.DEPT COL.HDG 'Dept'
Col 5- H20.HRP.PRI.CATEGORY
Col 6- HRP.LFM.NAME FMT '25T'

-----

Send output to 1. Printer
                2. Screen
                3. HOLD as a .dif file (Filename: HRDEV.TEMP)
                4. HOLD as a .txt file (Filename: HRDEV.TEMP)

                [Enter] to Cancel

=====
Choicel->
```

## Output to Printer

When option 1 is selected the user is prompted

**Enter header message....:**

This is the one line text that is printed in the header of each page of the report. It may be left blank if so desired.

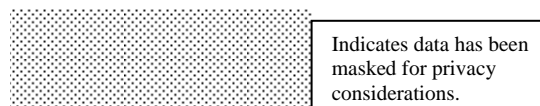
The output is then sent to the user's currently defined Unix printer. The left margin will vary depending on the number of fields selected.

### Oops.

Entering an exclamation point (!) at the header message prompt or the printer prompt will take the user back to the beginning and allow re-selection of fields.

### Altered format

If the combined length of all the fields on a report plus left margin and spaces between columns exceeds 256 the data will appear in a vertical format rather than a columnar format.



Hillsborough Community College  
 \*\*\* USER-DEFINED HRPER DATA REPORT \*\*\*  
 example

09-12-05

Page 1

#.	ID.....	Locn	Dept.	Cat	Last, First Middle Name..
1.	0000600	01	A0120	E	C
2.	0391726	01	A5300	N	el A
3.	0000438	01	A7400	A	
4.	0546247	01	A8470	N	on Adu
5.	0002283	01	A8700	E	Michelle M
6.	0404739	01	A9100	E	ard N
7.	0344077	10	A1100	A	lin K
8.	0529352	10	A1100	N	
9.	0001921	10	A1100	N	nice
10.	0585422	10	A1100	N	
11.	0405737	10	A1110	N	
12.	0000655	10	A1150	E	ne T
13.	0001697	10	A1200	F	Carolyn S
14.	0002193	10	A1200	F	
15.	0186915	10	A1400	F	
16.	0493406	10	A1400	F	, Maria
17.	0491032	10	A1500	A	iel
18.	0503427	10	A1500	F	E.
19.	0002453	10	A1500	F	la
20.	0002341	10	A1500	F	g
21.	0002862	10	A1500	F	th D
22.	0489772	10	A5200	E	e
23.	0142127	10	A6517	N	L
24.	0001705	10	A6540	N	
25.	0002237	10	A6540	N	l W
26.	0245120	10	A6540	N	i B
27.	0002215	10	A8210	N	
28.	0002028	20	A2002	N	
29.	0001789	20	A2002	N	a
30.	0002069	20	A2100	E	a D
31.	0001784	20	A2140	N	Donald
32.	0407125	20	A2200	A	E
33.	0415372	20	A2200	F	ina L
34.	0001978	20	A2200	N	n L
35.	0380936	20	A2200	N	
36.	0434182	20	A2300	E	ula R
37.	0585302	20	A5400	N	tin
38.	0002457	20	A6517	N	a
39.	0001918	30	A3004	N	
40.	0495291	30	A3100	N	n Marie
41.	0379526	30	A3200	A	ry M
42.	0002174	30	A3200	F	A
43.	0556229	30	A3200	F	an C
44.	0520724	30	A3200	F	othy R
45.	0001277	40	A4100	A	seph A
46.	0468122	40	A4100	F	
47.	0001935	40	A4200	F	ander
48.	0002248	40	A4200	F	L
49.	0557382	40	A4200	F	
50.	0396973	40	A4300	A	n

HR Custom Report: R.UD.HRP (v6)

Saved list: RSMITH.HRP.TEMP

## Output to Screen

When option 2 is selected the user is prompted

**Enter header message....:**

This is the one line text that is printed in the header of each page of the report. It may be left blank if so desired.

### Oops.

Entering an exclamation point (!) at the header message prompt or the printer prompt will take the user back to the beginning and allow re-selection of fields.

The output is then sent to the user's screen with a zero left margin.

```
09-09-05 Hillsborough Community College
*** USER-DEFINED HRPER DATA REPORT *** Page 1
EXAMPLE
```

#.	ID.....	Locn	Dept.	Cat	Last, First Middle Name..
1.	0000600	01	A0120	E	A
2.	0391726	01	A5300	N	Be A
3.	0000438	01	A7400	A	A
4.	0546247	01	A8470	N	Be Adu
5.	0002283	01	A8700	E	Be Michelle M
6.	0404739	01	A9100	E	Be d N
7.	0344077	10	A1100	A	Be n K
8.	0529352	10	A1100	N	Be
9.	0001921	10	A1100	N	A e
10.	0585422	10	A1100	N	Al
11.	0405737	10	A1110	N	A
12.	0000655	10	A1150	E	Be T
13.	0001697	10	A1200	F	Ac Carolyn S
14.	0002193	10	A1200	F	Be
49.	0557382	40	A4200	F	Avon Sandra M
50.	0396973	40	A4300	A	Be

HR Custom Report: R.UD.HRP (v6) Saved list: RSMITH.HRP.TEMP  
Done! Press any key to continue...

Indicates data has been masked for privacy considerations.

## Output to HOLD as a .dif File

When option 3 is selected the report is immediately written to the HOLD file in the universal .dif format. A .dif file can be opened directly from spreadsheet programs such as Excel.

```

Choicel-> 3

50 records retrieved to list 0.
DOWNLOAD version 7.11
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT DIF
Using input file HRPER
Output to file _HOLD_ RSMITH.TEMP

****
50 records processed.
Done! Press any key to continue...
    
```

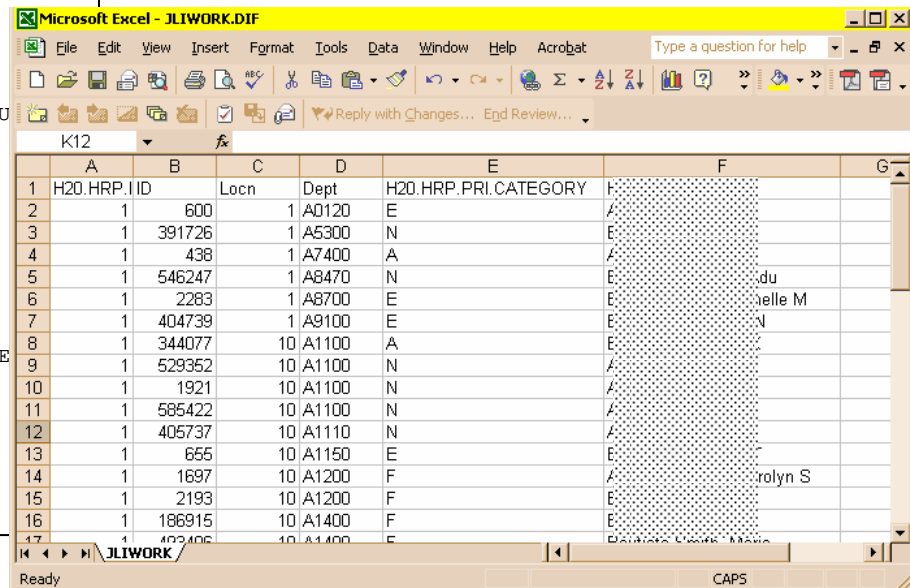
The file is given the name **x.TEMP** where *x* is the user's username. In this example the user is R. Smith.

```

TABLE
0,1
"Download"
VECTORS
0,6
" "
TUPLES
0,0
" "
DATA
0,0
" "
-1,0
BOT
1,0
"H2O.HRP.ITEM.COU
1,0
"ID"
1,0
"Locn"
1,0
1,0
1,0
1,0
"Dept"
1,0
"H2O.HRP.PRI.CATE
1,0
"HRP.LFM.NAME"
-1,0
BOT
0,1.
V
    
```

When viewed in the HOLD file data looks like a long vertical list.

However, when downloaded to the PC and opened in Excel it looks more familiar.



Note that when imported into a spreadsheet the line count column shows a 1 for every row.

## Output to HOLD as a .txt File

When option 4 is selected the report is immediately written to the HOLD file in the universal .txt format. In such a file, each data element is inclosed in quotes and data elements are separated by commas.

A .txt file can be imported into many database and spreadsheet programs but some formatting adjustments may be necessary.

```
Choice1-> 4

50 records retrieved to list 0.
DOWNLOAD version 7.11
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
Using input file HRPER
Output to file _HOLD_ RSMITH.TEMP

****
50 records processed.
Done! Press any key to continue...
```

The file is given the name **x.TEMP** where *x* is the user's username. In this example the user is R. Smith.

A comma-delimited .txt file as it appears in the HOLD file.

```
"H2O.HRP.ITEM.COUNT", "ID", "Locn", "Dept", "H2O.HRP.PRI.CATEGORY", "HRP.LFM.NAME"
1., "0000600", "01", "A0120", "E", "A", " "
1., "0391726", "01", "A5300", "N", "E", " "
1., "0000438", "01", "A7400", "A", "A", " "
1., "0546247", "01", "A8470", "N", "E", " "
1., "0002283", "01", "A8700", "E", "E", "le M"
1., "0404739", "01", "A9100", "E", "E", " "
1., "0344077", "10", "A1100", "A", "E", " "
1., "0529352", "10", "A1100", "N", "A", " "
1., "0001921", "10", "A1100", "N", "A", " "
1., "0585422", "10", "A1100", "N", "A", " "
1., "0405737", "10", "A1110", "N", "A", " "
1., "0000655", "10", "A1150", "E", "E", " "
1., "0001697", "10", "A1200", "F", "A", "1 S"
1., "0002193", "10", "A1200", "F", "E", " "
1., "0186915", "10", "A1400", "F", "E", " "
1., "0493406", "10", "A1400", "F", "E", " "
1., "0491032", "10", "A1500", "A", "A", " "
1., "0503427", "10", "A1500", "F", "A", " "
1., "0002453", "10", "A1500", "F", "E", " "
1., "0002341", "10", "A1500", "F", "E", " "
1., "0002862", "10", "A1500", "F", "A", " "
```

---

## Section 3. *User-Defined Operations on the POSITION File*

---

From this menu the user may navigate to POS saved list builders, the sort utility and the report itself.

```
OHR|OTH|UDR|POS          DPT|LST|UDR|POS
User Defined Reports from POSITION file

  1. Create POS saved list

  2. Sort POS saved list

  3. POS report

  ? Help

[Enter] to Quit

=====
Choice->
```

Option 1 takes the user to the a saved list builder menu where POS saved list lists may be created in various ways. For user-defined reports purposes, any POS saved list will work, regardless of how or where it was created. See the Introduction to HR Custom Reports Training Guide and Reference for detailed information on building saved lists.

## User-Defined POS Saved List Sorter

This saved list sorter works on any POSITION saved list. It allows the user to sort a list on those fields that may be placed on the user-defined POS report.

```
Process: Sort POS saved list                                (P.SORT.POS)

Descr..: User enters POS saved list name then selects up to four fields
         (below), in any order, by which to sort the list. This allows
         1,256,640 possible sort combinations.

         Barg-Unit      End-Date      Location-ID      Start-Date
         Class-Code     FRS-Pos-Num   Occ-Act-Code     Supv-Pos-Num
         Dept-Desc      Grade         Pos-Contr-Num    Type-Code
         Dept-ID        Incumbent-ID   Pos-Num (@ID)    Vacancy-Status
         Disc-Ex-Code   Incumbent-Name Previous-ID
         EEO-Code       Location-Desc  Short-Title
         -----
         GL-Dept-Desc   GL-Fund-Type   GL-Object-Code   Salary-Table
         GL-Dept-ID     GL-Location-Desc GL-Acct-Num
         GL-Fund-Desc   GL-Location-ID Range-Maximum
         GL-Fund-ID     GL-Object-Desc Range-Minimum
         =====
Name of POS saved list to be sorted ([Enter] to cancel).
: pos.temp

Overwriting existing select list.
50 records retrieved to list 0.

Press any key to continue...
```

To start, the user enters the name of a POS saved list. If a saved list by that name exists, its size will be reported, otherwise the user will be advised that it cannot be found.

**Caution!** Use only a POS saved list. If you enter the name of an existing saved list created on any other file, HRPER for example, it will be opened but error messages will appear when sorting begins

```

Process: Sort POS saved list by data          (Field List A)          (P.SORT.POS)

Descr..: Make up to 4 selections, pressing [Enter] after each.

  1. Bargaining-Unit          10. Incumbent-ID          19. Start-Date
  2. Class-Code              11. Incumbent-Name       20. Supv-Pos-Num
  3. Dept-Desc               12. Location-Desc       21. Type-Code
  4. Dept-ID                 13. Location-ID         22. Vacancy-Status
  5. Disc-Ex-Code           14. Occ-Act-Code        -----
  6. EEO-Code                15. Pos-Contr-Num       00. Go to List B
  7. End-Date                16. Pos-Num (@ID)      99. Done! No more picks
  8. FRS-Pos-Num            17. Previous-ID
  9. Grade                   18. Short-Title          [Enter] Quit
-----
1st Sort-
2nd Sort-
3rd Sort-
4th Sort-
=====
Choice->

```

After a saved list has been identified, the user is presented with a list of 22 fields (List A). Selecting "00" causes another 13 fields (List B) to be presented. The user may toggle between these two lists at any time.

```

Process: Sort POS saved list by data          (Field List B)          (P.SORT.POS)

Descr..: Choose up to 4 fields from list pressing [Enter] after each.

 23. GL-Dept-Desc           29. GL-Location-ID       35. Salary-Table
 24. GL-Dept-ID            30. GL-Object-Desc      -----
 25. GL-Fund-Desc          31. GL-Object-Code      00. Go to List A
 26. GL-Fund-ID            32. GL-Acct-Num         99. Done! No more
 27. GL-Fund-Type          33. Range-Maximum
 28. GL-Location-Desc      34. Range-Minimum      [Enter] Quit
-----
1st Sort-
2nd Sort-
3rd Sort-
4th Sort-
=====
Choice->

```

After a saved list has been identified, the user is prompted to select any of 35 fields as the first sort. The user enters the number of the desired field. In this example option 4, representing Department ID has been selected. That field name is then displayed and the user is prompted for another pick.

```
-----  
1ST SORT- BY POS.DEPT  
2ND SORT-  
3RD SORT-  
4TH SORT-  
-----  
Choice->
```



Sometimes selecting a field from List B will cause List A to be re-displayed automatically without the user entering "00".

The user then selects another field as the second sort. Here, Class Code has been selected.

```
-----  
1ST SORT- BY POS.DEPT  
2ND SORT- BY POS.CLASS  
3RD SORT-  
4TH SORT-  
-----  
Choice->
```

The user then selects another field as the third sort. Here, Position Number (also known as @ID) has been selected.

```
-----  
1ST SORT- BY POS.  
2ND SORT- BY POS.CLASS  
3RD SORT- BY @ID  
4TH SORT-  
-----  
Choice->
```

The user then selects another field as the final sort. Here, Short Title has been selected.

```
-----  
1ST SORT- BY POS.DEPT  
2ND SORT- BY POS.CLASS  
3RD SORT- BY @ID  
4TH SORT- BY POS.SHORT.TITLE  
=====
```

Thank you. Please wait...

50 records retrieved to list 0.

RSMITH.POS.TEMP has been resorted. Press any key to continue...

After the last desired sort field has been selected the user enters "99" indicating no more picks are to be made. The saved list sorting automatically begins and the user is advised when it is finished. The sorting process is complete and the screen can be exited.

### Using fewer than four sorts.

If only one, two, or three sorts are desired the "Done" option (99) may be selected in lieu of another field. This tells the program to start the sort with just the fields already selected.



**Tip** The position number (@ID) identifies a position right down to the individual position record. If the position number is picked as sort field 1, 2, or 3, picking another sort field will have no effect.

## Canceling.

Pressing <Enter> at any `Choice->` prompt will cause the sort to be cancelled and the screen exited. In case the user has pressed <Enter> by mistake and really does not intend to abort, the following prompt is displayed.

Do you really want to cancel? [Y]/N:

The default value here is "Y", as indicated by the bracket, so if the user wants to exit, pressing <Enter> again, or entering "Y" will end the process.

If the user wants to continue the process entering "N" or "n" will take the user back with all the selected fields still in place.



**Tip** It is generally good practice to sort the data in the same order of columns that will appear on the user-defined report.

## User-Defined POS Report (R.UD.POS)

This report generator works on any POSITION saved list. It allows the user to select up to four fields to be shown on the report. The screen lists the same fields as seen on the saved list sorter except for ID which is automatically included in any report created.

```
Report: User-defined Position Data Report (R.UD.POS)

Descr.: Column 1 is always line number and column is always Pos-Num. User may
select up to four more fields from lists below. Order of columns 3
thru 6 is determined by sequence that fields are selected. Data order
is determined by saved list (required) which should be sorted prior
to running report.

Barg-Unit      End-Date      Location-ID   Supv-Pos-Name
Class-Code     FRS-Pos-Num  Occ-Act-Code  Type-Code
Dept-Desc      Grade        Pos-Contr-Num Vacancy-Status
Dept-ID        Incumbent-ID Previous-ID
Disc-Ex-Code   Incumbent-Name Short-Title
EEO-Code       Location-Desc Start-Date
-----
GL-Dept-Desc   GL-Fund-Type  GL-Object-Code Salary-Table
GL-Dept-ID     GL-Location-Desc GL-Acct-Num
GL-Fund-Desc   GL-Location-ID Range-Maximum
GL-Fund-ID     GL-Object-Desc Range-Minimum
=====
Name of POS saved list to be used ([Enter] to cancel).
: POS.TEMP

Overwriting existing select list.
50 records retrieved to list 0.
Press any key to continue...
```

To start, the user enters the name of a POS saved list. If a saved list by that name exists, its count will be reported, otherwise the user will be advised that it cannot be found.

**Caution!** Use only a POS saved list. If you enter the name of an existing saved list created on any other file, HRPER for example, it will be opened but it will NOT work. Error messages or long lists of IDs may appear on screen or on the printed report.

```

Report: User-defined Position Data Report   (Fields A, Basic Data) (R.UD.POS)

Desc..: Choose up to 4 fields from list, pressing [Enter] after each.

  1. Bargaining-Unit          10. Incumbent-ID           19. Supv-Pos-Num
  2. Class-Code              11. Incumbent-Name        20. Type-Code
  3. Dept-Desc               12. Location-Desc        21. Vacancy-Status
  4. Dept-ID                13. Location-ID          -----
  5. Disclos-Exempt-Code    14. Occ-Act-Code         00. Go to list B
  6. EEO-Code               15. Pos-Contr-Num       99. Done! No more picks
  7. End-Date               16. Previous-ID
  8. FRS-SMS-Pos-Num       17. Short-Title          [Enter] Quit
  9. Grade                  18. Start-Date

-----
Col 2- @ID FMT '8L' COL.HDG 'Pos-Num'
Col 3-
Col 4-
Col 5-
Col 6-
=====
Choice->

```

After a saved list has been identified, the screen is redisplayed with all of the available fields numbered. The position number (@ID) always occupies the second column. The user is prompted to select any of 35 fields for the second column from either List A or List B.

```

Report: User-defined Pos Data Report   (Fields B, Financial Data) (R.UD.POS)

Desc..: Choose up to 4 fields from list, pressing [Enter] after each.

 22. GL-Dept-Desc           28. GL-Location-ID        34. Salary-Table
 23. GL-Dept-ID            29. GL-Object-Desc       -----
 24. GL-Fund-Desc         30. GL-Object-Code       00. Go to List A
 25. GL-Fund-ID           31. GL-Acct-Num          99. Done! No more
 26. GL-Fund-Type         32. Range-Maximum
 27. GL-Location-Desc     33. Range-Minimum        [Enter] Quit

-----
Col 2- @ID FMT '8L' COL.HDG 'Pos-Num'
Col 3-
Col 4-
Col 5-
Col 6-
=====
Choice->

```

The user enters the number of the desired field. In this example option 4, representing Department ID has been selected. That field name is then displayed as column 3 and the user is prompted for another pick.

```
-----  
Col 2- @ID FMT '8L' COL.HDG 'Pos-Num'  
Col 3- POS.DEPT FMT '5L' COL.HDG 'Dept'  
Col 4-  
Col 5-  
Col 6-  
-----  
Choice->
```

The user then selects another field for column 4. Here, Class Code has been selected.

```
-----  
Col 2- @ID FMT '8L' COL.HDG 'Pos-Num'  
Col 3- POS.DEPT FMT '5L' COL.HDG 'Dept'  
Col 4- POS.CLASS FMT '5L' COL.HDG 'Class'  
Col 5-  
Col 6-  
-----  
Choice->
```

The user then selects another field for column 5. Here, Grade has been selected.

```
-----  
Col 2- @ID FMT '8L' COL.HDG 'Pos-Num'  
Col 3- POS.DEPT FMT '5L' COL.HDG 'Dept'  
Col 4- POS.CLASS FMT '5L' COL.HDG 'Class'  
Col 5- H20.POS.POSPAY.GRADE  
Col 6-  
-----  
Choice->
```

The user then selects another field column 6. Here, Short Title has been selected.

```
-----  
Col 2- @ID FMT '8L' COL.HDG 'Pos-Num'  
Col 3- POS.DEPT FMT '5L' COL.HDG 'Dept'  
Col 4- POS.CLASS FMT '5L' COL.HDG 'Class'  
Col 5- H20.POS.POSPAY.GRADE  
Col 6- POS.SHORT.TITLE FMT '20L'  
-----  
  
Choice-> 99
```

"99" is then entered which takes the user to the Directing Output screen where the report may be sent to the screen, a printer or the HOLD file as a .dif or .txt file.

### Canceling.

Pressing <Enter> at any Choice-> prompt will cause the field selection to be cancelled and the screen exited. In case the user has pressed <Enter> by mistake and really does not intend to abort, the following prompt is displayed.

Do you really want to cancel? [Y]/N:

The default value here is "Y", as indicated by the bracket, so if the user wants to exit, pressing <Enter> again, or entering "Y" will end the process.

If the user wants to continue the process entering "N" or "n" will take the user back with all the selected fields still in place.

When the last desired field has been selected the user enters "99" indicating that there are no more picks to be made. This may be after the first, second, third, or fourth pick. See the "Directing Output" section below for more information.

### Using fewer than four user-selected fields.

If only one, two, or three fields are desired the "Done" option (99) may be selected in lieu of another field. This tells the program to start running the report with just the fields already selected.

### Oops.

Entering an exclamation point (!) at the header message prompt or the printer prompt will take the user back to the beginning and allow re-selection of fields

## Directing Output

After all the desired fields have been selected, the composition of the report, as defined by the user, is displayed and the user is prompted for a destination. This step is the same regardless of the file being used.

```
Report: User-defined HRPER Data Report                                (R.UD.HRP)

Composition has been defined.

Col 2- @ID FMT '8L' COL.HDG 'Pos-Num'
Col 3- POS.DEPT FMT '5L' COL.HDG 'Dept'
Col 4- POS.CLASS FMT '5L' COL.HDG 'Class'
Col 5- H20.POS.POSPAY.GRADE
Col 6- POS.SHORT.TITLE FMT '20L'
-----

Send output to 1. Printer
                2. Screen
                3. HOLD as a .dif file (Filename: HRDEV.TEMP)
                4. HOLD as a .txt file (Filename: HRDEV.TEMP)

                [Enter] to Cancel

=====
Choicel->
```

## Output to Printer

When option 1 is selected the user is prompted

**Enter header message....:**

This is the one line text that is printed in the header of each page of the report. It may be left blank if so desired.

The output is then sent to the user's currently defined Unix printer. The left margin will vary depending on the number of fields selected.

### Oops.

Entering an exclamation point (!) at the header message prompt or the printer prompt will take the user back to the beginning and allow re-selection of fields.

### Altered format

If the combined length of all the fields on a report plus left margin and spaces between columns exceeds 256 the data will appear in a vertical format rather than a columnar format.

Hillsborough Community College  
 \*\*\* USER-DEFINED POSITION DATA REPORT \*\*\*  
 EXAMPLE

09-12-05

Page 1

#.	Pos-Num.	Dept.	Class	Grd.	POS.SHORT.TITLE.....
1.	AFC10001	A0100	A0101	1	College President
2.	AFC30007	A0110	A0304	3	College Attorney
3.	AFC50021	A0120	A0514	5	Asst to President
4.	AFC50004	A0130	A0504	5	Dir, Human Resources
5.	AFC60001	A0150	A0601	6	ExDir, Econon Devel
6.	AFC50005	A0160	A0505	5	Exdir, Foundation
7.	AFC20001	A0200	A0201	2	VP, Operations, Sr
8.	AFC30003	A1000	A0301	3	Campus President, DM
9.	AFC50007	A1100	A0507	5	Dean, Student Svcs
10.	AFC50010	A1200	A0510	5	Dean, AA /Hum & Comm
11.	AFC50013	A1300	A0511	5	Dean, Assoc Science
12.	AFC50008	A1400	A0508	5	Dean, Health Well Sp
13.	AFC50011	A1500	A0510	5	Dean, AA /Math & Sci
14.	AFC30002	A2000	A0301	3	Campus President, Yb
15.	AFC50018	A2100	A0507	5	Dean, Student Svcs
16.	AFC50017	A2200	A0513	5	Dean, Academic Affrs
17.	AFC50012	A2300	A0511	5	Dean, Assoc Science
18.	AFC30004	A3000	A0301	3	Campus President, PC
19.	AFC50019	A3100	A0507	5	Dean, Student Svcs
20.	AFC50015	A3200	A0512	5	Dean, Arts & Sci
21.	AFC50009	A3300	A0509	5	Dean, Env & Tech Prg
22.	AFC30001	A4000	A0301	3	Campus President, Br
23.	AFC50020	A4100	A0507	5	Dean, Student Svcs
24.	AFC50016	A4200	A0513	5	Dean, Academic Affrs
25.	AFC50014	A4300	A0511	5	Dean, Assoc Science
26.	AFC6V001	A4300	A0606	6	ExDir, FL-ATE
27.	AFC40001	A5000	A0401	4	VP, Info Technology
28.	AFC70008	A5100	A0708	7	Dir, Academic Tech
29.	AFC60007	A5300	A0607	6	Dir, Network/Telecom
30.	AFC60006	A5400	A0608	6	Dir, Admin Systems
31.	AFC30006	A6000	A0303	3	VP, Admin / CFO
32.	AFC70001	A6300	A0701	7	Dir, Purchasing
33.	AFC60005	A6400	A0605	6	Controller
34.	EFCB0003	A6450	E0503	E	Accounting Svcs Ofcr
35.	AFC70006	A6460	A0706	7	Dir, Financial Svcs
36.	AFC70009	A6500	A0709	7	Dir, Risk/Safety/Aux
37.	AFC60002	A6900	A0602	6	Dir, Facilities
38.	AFC50001	A7000	A0501	5	ExDir, Mktg & PubRel
39.	AFC70005	A7200	A0705	7	Dir, Inst Adv Spl Pr
40.	AFC70002	A7400	A0702	7	Dir, Mkt & Creat Svc
41.	AFC30005	A8000	A0302	3	VP, Educ & Stu Devel
42.	AFC70004	A8004	A0704	7	Dir, Internat'l Educ
43.	AFC50006	A8200	A0506	5	Dir, Assoc Arts Prog
44.	AFC50002	A8300	A0502	5	Dir, Technical Progr
45.	AFC40002	A8400	A0402	4	Dir, Student Svcs
46.	AFC60004	A8600	A0604	6	Dean, Comm Svc Prog
47.	AFC70007	A8700	A0707	7	Dir, Financial Aid
48.	AFC50003	A9000	A0503	5	ExDir, Str Pln & Rsr
49.	AFC60003	A9100	A0603	6	Dir, Inst'l Research
50.	AFC70003	A9200	A0703	7	Dir, Mgt Info Sys

HR Custom Report: R.UD.POS (v5)

Saved list: RSMITH.POS.TEMP

## Output to Screen

When option 2 is selected the user is prompted

**Enter header message....:**

This is the one line text that is printed in the header of each page of the report. It may be left blank if so desired.

### Oops.

Entering an exclamation point (!) at the header message prompt or the printer prompt will take the user back to the beginning and allow re-selection of fields.

The output is then sent to the user's screen with a zero left margin.

```

                                Hillsborough Community College
                                *** USER-DEFINED POSITION DATA REPORT ***
09-12-05                                EXAMPLE                                Page 1

#   Pos-Num.  Dept.   Class  Grd.  POS.SHORT.TITLE.....
1.  AFC10001  A0100  A0101  1     College President
2.  AFC30007  A0110  A0304  3     College Attorney
3.  AFC50021  A0120  A0514  5     Asst to President
4.  AFC50004  A0130  A0504  5     Dir, Human Resources
5.  AFC60001  A0150  A0601  6     ExDir, Econon Devel
6.  AFC50005  A0160  A0505  5     Exdir, Foundation
7.  AFC20001  A0200  A0201  2     VP, Operations, Sr
8.  AFC30003  A1000  A0301  3     Campus President, DM
9.  AFC50007  A1100  A0507  5     Dean, Student Svcs
10. AFC50010  A1200  A0510  5     Dean, AA /Hum & Comm
11. AFC50013  A1300  A0511  5     Dean, Assoc Science
12. AFC50008  A1400  A0508  5     Dean, Health Well Sp
13. AFC50011  A1500  A0510  5     Dean, AA /Math & Sci
14. AFC30002  A2000  A0301  3     Campus President, Yb
15. AFC50018  A2100  A0507  5     Dean, Student Svcs
16. AFC50017  A2200  A0513  5     Dean, Academic Affrs
17. AFC50012  A2300  A0511  5     Dean, Assoc Science
18. AFC30004  A3000  A0301  3     Campus President, PC
19. AFC50019  A3100  A0507  5     Dean, Student Svcs
20. AFC50015  A3200  A0512  5     Dean, Arts & Sci
21. AFC50009  A3300  A0509  5     Dean, Env & Tech Prg
22. AFC30001  A4000  A0301  3     Campus President, Br
23. AFC50020  A4100  A0507  5     Dean, Student Svcs

41. AFC30005  A8000  A0302  3     VP, Educ & Stu Devel
42. AFC70004  A8004  A0704  7     Dir, Internat'l Educ
43. AFC50006  A8200  A0506  5     Dir, Assoc Arts Prog
44. AFC50002  A8300  A0502  5     Dir, Technical Progr
45. AFC40002  A8400  A0402  4     Dir, Student Svcs
46. AFC60004  A8600  A0604  6     Dean, Comm Svc Prog
47. AFC70007  A8700  A0707  7     Dir, Financial Aid
48. AFC50003  A9000  A0503  5     ExDir, Str Pln & Rsr
49. AFC60003  A9100  A0603  6     Dir, Inst'l Research
50. AFC70003  A9200  A0703  7     Dir, Mgt Info Sys

HR Custom Report: R.UD.POS (v5)                                Saved list: RSMITH.POS.TEMP
Done! Press any key to continue...
```

## Output to HOLD as a .dif File

When option 3 is selected the report is immediately written to the HOLD file in the universal .dif format. A .dif file can be opened directly from spreadsheet programs such as Excel.

```

Choicel-> 3

50 records retrieved to list 0.
DOWNLOAD version 7.11
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT DIF
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT DIF
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT DIF
Using input file POSITION
Output to file _HOLD_ RSMITH.TEMP

*****
50 records processed.
Done! Press any key to continue...
    
```

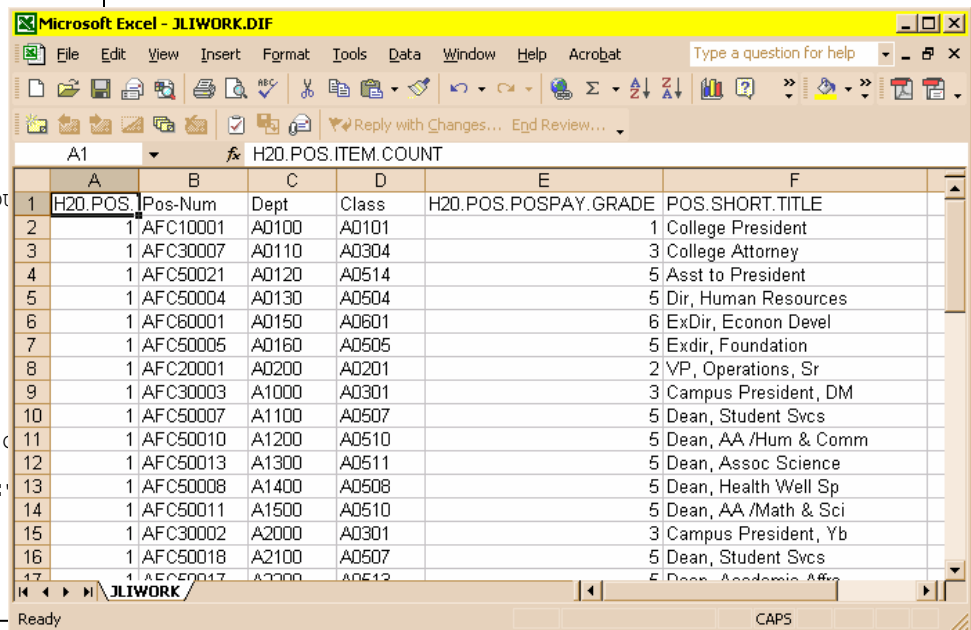
The file is given the name **x.TEMP** where *x* is the user's username. In this example the user is R. Smith.

```

TABLE
0,1
"Download"
VECTORS
0,6
" "
TUPLES
0,0
" "
DATA
0,0
" "
-1,0
BOT
1,0
"H2O.POS.ITEM.COUNT"
1,0
"Pos-Num"
1,0
"Dept"
1,0
"Class"
1,0
"Class"
1,0
"H2O.POS.POSPAY.COUNT"
1,0
"POS.SHORT.TITLE"
-1,0
BOT
0,1.
V
    
```

When viewed in the HOLD file data looks like a long vertical list.

However, when downloaded to the PC and opened in Excel it looks more familiar.



Note that when imported into a spreadsheet the line count column shows a 1 for every row.

## Output to HOLD as a .txt File

When option 4 is selected the report is immediately written to the HOLD file in the universal .txt format. In such a file, each data element is inclosed in quotes and data elements are separated by commas.

A .txt file can be imported into many database and spreadsheet programs but some formatting adjustments may be necessary.

```
Choice1-> 4

50 records retrieved to list 0.
DOWNLOAD version 7.11
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
Using input file HRPER
Output to file _HOLD_ RSMITH.TEMP

****
50 records processed.
Done! Press any key to continue...
```

The file is given the name **x.TEMP** where *x* is the user's username. In this example the user is R. Smith.

A comma-delimited .txt file as it appears in the HOLD file.

```
"H2O.POS.ITEM.COUNT", "Pos-Num", "Dept", "Class", "H2O.POS.POSPAY.GRADE", "POS.SHORT
1., "AFC10001", "A0100", "A0101", "1", "College President "
1., "AFC30007", "A0110", "A0304", "3", "College Attorney "
1., "AFC50021", "A0120", "A0514", "5", "Asst to President "
1., "AFC50004", "A0130", "A0504", "5", "Dir, Human Resources"
1., "AFC60001", "A0150", "A0601", "6", "ExDir, Econon Devel "
1., "AFC50005", "A0160", "A0505", "5", "Exdir, Foundation "
1., "AFC20001", "A0200", "A0201", "2", "VP, Operations, Sr "
1., "AFC30003", "A1000", "A0301", "3", "Campus President, DM"
1., "AFC50007", "A1100", "A0507", "5", "Dean, Student Svcs "
1., "AFC50010", "A1200", "A0510", "5", "Dean, AA /Hum & Comm"
1., "AFC50013", "A1300", "A0511", "5", "Dean, Assoc Science "
1., "AFC50008", "A1400", "A0508", "5", "Dean, Health Well Sp"
1., "AFC50011", "A1500", "A0510", "5", "Dean, AA /Math & Sci"
1., "AFC30002", "A2000", "A0301", "3", "Campus President, Yb"
1., "AFC50018", "A2100", "A0507", "5", "Dean, Student Svcs "
1., "AFC50017", "A2200", "A0513", "5", "Dean, Academic Affrs"
1., "AFC50012", "A2300", "A0511", "5", "Dean, Assoc Science "
1., "AFC30004", "A3000", "A0301", "3", "Campus President, PC"
1., "AFC50019", "A3100", "A0507", "5", "Dean, Student Svcs "
1., "AFC50015", "A3200", "A0512", "5", "Dean, Arts & Sci "
1., "AFC50009", "A3300", "A0509", "5", "Dean, Env & Tech Prg"
```

To preserve proper pagination on double-sided printing,  
this page has been intentionally left blank.

---

## Section 4. *User-Defined Operations on the H20.Classifications File*

---

From this menu the user may navigate to CLS saved list builders, the sort utility and the report itself.

```
OHR|OTH|UDR|CLS          DPT|LST|UDR|CLS
User Defined Reports from H20.CLASSIFICATIONS file

  1. Create CLS saved list
  2. Sort CLS saved list
  3. CLS report
  ? Help

[Enter] to Quit

=====
Choice->
```

Option 1 takes the user to the a saved list builder menu where CLS saved lists may be created in various ways. For user-defined reports purposes, any CLS saved list will work regardless of how or where it was created. See the Introduction to HR Custom Reports Training Guide and Reference for detailed information on building saved lists.

## User-Defined CLS Saved List Sorter

This saved list sorter works on any H20.CLASSIFICATIONS saved list. It allows the user to sort a list on the same fields that may be placed on the user-defined CLS report.

```
Process: Sort CLASSIFICATIONS saved list                                (P.CLS.SORT)
Descr...: Takes CLS saved list name from user and sorts it.

        User selects up to four fields (below), in any order, by which to
        sort the saved list. This allows 212,520 possible sort orders.

Active flag          Grade          Salary table desc
Bargaining unit     Long title     Short title
Bargain unit desc   Occup activity  Spec add date
Class code (@ID)    Occup activity desc  Spec change date
Class end date      Payclass       Spec status
Class start date    Payclass desc   Spec status desc
(Reserved)          Sal sched status
EEO category        Sal sched stat desc
EEO category desc   Salary table

=====

Name of CLS saved list to be sorted ([Enter] to cancel).
: CLS.TEMP
50 records retrieved to list 0.
Press any key to continue...
```

To start, the user enters the name of a CLS saved list. If a saved list by that name exists, its count will be reported, otherwise the user will be advised that it cannot be found.

**Caution!** Use only a CLS saved list. If you enter the name of an existing saved list created on any other file, HRPER for example, it will be opened but error messages will appear when sorting begins

```

Process: Sort DEPTS saved list                                     (P.DEPTS.SORT)

Descr.: Make up to 4 selections, pressing [Enter] after each.

  1. Active flag           10. Grade                 19. Salary table desc
  2. Bargaining unit      11. Long title           20. Short title
  3. Bargain unit desc    12. Occup activity      21. Spec add date
  4. Class code (@ID)     13. Occup activity desc 22. Spec change date
  5. Class end date       14. Payclass            23. Spec status
  6. Class start date     15. Payclass desc       24. Spec status desc
  7. (Reserved)          16. Sal sched status    -----
  8. EEO category         17. Sal sched stat desc 25. Done! No more picks
  9. EEO category desc    18. Salary table       [Enter] Quit

-----
1ST SORT-
2ND SORT-
3RD SORT-
4TH SORT-
=====
Choice->

```

After a saved list has been identified, the user is presented with a list of 24 fields. The user enters the number of the desired field. In this example option 10, representing grade has been selected. That field name is then displayed as the first sort and the user is prompted for another pick.

```

-----
1ST SORT- BY H20.CLS.GRADE
2ND SORT-
3RD SORT-
4TH SORT-
=====
Choice->

```

The user then selects another field as the second sort. Here, Payclass has been selected.

```

-----
1ST SORT- BY H20.CLS.GRADE
2ND SORT- BY H20.CLS.PAYCLASS
3RD SORT-
4TH SORT-
=====
Choice->

```

The user then selects another field as the third sort. Here, Bargaining Unit has been selected.

```
-----  
1ST SORT- BY H20.CLS.GRADE  
2ND SORT- BY H20.CLS.PAYCLASS  
3RD SORT- BY H20.CLS.BARG.UNIT  
4TH SORT-  
=====
```

Choice->

The user then selects another field as the final sort. Here, Short Title has been selected.

```
-----  
1ST SORT- BY H20.CLS.GRADE  
2ND SORT- BY H20.CLS.PAYCLASS  
3RD SORT- BY H20.CLS.BARG.UNIT  
4TH SORT- BY H20.CLS.SHORT.TITLE  
=====
```

Thank you. Please wait...

50 records retrieved to list 0.

RSMITH.CLS.TEMP has been resorted. Press any key to continue...

After the last desired sort field has been selected the saved list sorting automatically begins and the user is advised when it is finished. The sorting process is complete and the screen can be exited.

**Using fewer than four sorts.**

If only one, two, or three sorts are desired the "Done" option (25) may be selected in lieu of another field. This tells the program to start the sort with just the fields already selected.

## User-Defined CLS Report (R.UD.CLS)

This report generator works on any CLS (H20.CLASSIFICATIONS) saved list. It allows the user to select up to four fields to be shown on the report. The screen lists the same fields as seen on the saved list sorter except for ID which is automatically included in any report created

```
Report: User-defined Classification Data Report (R.UD.CLS)

Descr.: Shows any 4 POSITION data elements chosed by user.

User selects up to four fields (below), in any order, to appear on
report. Column order determined by sequence that fields are selected.
Data order determined by saved list which is required. Saved list
should be sorted prior to running this report.

Active flag           Grade           Salary table desc
Bargaining unit      Long title     Short title
Bargain unit desc    Occup activity Spec add date
Class code (@ID)     Occup activity desc Spec change date
Class end date       Payclass      Spec status
Class start date     Payclass desc Spec status desc
Comment              Sal sched status
EEO category         Sal sched stat desc
EEO category desc    Salary table

=====

Name of CLS saved list to be used ([Enter] to cancel).
: CLS.TEMP
50 records retrieved to list 0.
Press any key to continue...
```

To start, the user enters the name of a CLS saved list. If a saved list by that name exists, its count will be reported, otherwise the user will be advised that it cannot be found.

**Caution!** Use only a CLS saved list. If you enter the name of an existing saved list created on any other file, HRPER for example, it will be opened but it will NOT work. Error messages or long lists of IDs may appear on screen or on the printed report.

```

Report: User-defined Classification Data Report (R.UD.CLS)

Desc.: Pick up to 4 fields, pressing [Enter] after each.

  1. Active flag          10. Grade                19. Salary table desc
  2. Bargaining unit    11. Long title           20. Short title
  3. Bargain unit desc  12. Occup activity       21. Spec add date
  4. Class code (@ID)   13. Occup activity desc  22. Spec change date
  5. Class end date     14. Payclass             23. Spec status
  6. Class start date   15. Payclass desc        24. Spec status desc
  7. Comment            16. Sal sched status     -----
  8. EEO category       17. Sal sched stat desc  25. Done! No more picks
  9. EEO category desc  18. Salary table         [Enter] Quit
-----

Col 1-
Col 2-
Col 3-
Col 4-
=====

Choice->

```

After a saved list has been identified, the screen is redisplayed with all of the available fields numbered. The user is prompted to select any of 24 fields. The user enters the number of the desired field. In this example option 10, representing Grade has been selected. That field name is then displayed and the user is prompted for another pick.

```

-----
Col 2- @ID FMT '5L' COL.HDG 'Class}Code'
Col 3- H20.CLS.GRADE
Col 4-
Col 5-
Col 6-
=====

Choice->

```

The user then selects another field for column 4. Here, Pay Class has been selected.

```

-----
Col 2- @ID FMT '5L' COL.HDG 'Class}Code'
Col 3- H20.CLS.GRADE
Col 4- H20.CLS.PAYCLASS FMT '3L' COL.HDG 'Pay}Cls'
Col 5-
Col 6-
=====

Choice->

```

The user then selects another field for column 5. Here, Bargaining Unit has been selected.

```
-----  
Col 2- @ID FMT '5L' COL.HDG 'Class}Code'  
Col 3- H20.CLS.GRADE  
Col 4- H20.CLS.PAYCLASS FMT '3L' COL.HDG 'Pay}Cls'  
Col 5- H20.CLS.BARG.UNIT  
Col 6-  
-----  
Choice->
```

The user then selects another field for column 6. Here, Short Title has been selected.

```
-----  
Col 2- @ID FMT '5L' COL.HDG 'Class}Code'  
Col 3- H20.CLS.GRADE  
Col 4- H20.CLS.PAYCLASS FMT '3L' COL.HDG 'Pay}Cls'  
Col 5- H20.CLS.BARG.UNIT  
Col 6- H20.CLS.SHORT.TITLE  
-----
```

When a field for column 6 has been selected the user is taken immediately to the output screen where the destination of the report can be picked. See the "Directing Output" section below for more information.

### Canceling.

Pressing <Enter> at any Choice-> prompt will cause the field selection to be cancelled and the screen exited. In case the user has pressed <Enter> by mistake and really does not intend to abort, the following prompt is displayed.

Do you really want to cancel? [Y]N:

The default value here is "Y", as indicated by the bracket, so if the user wants to exit, pressing <Enter> again, or entering "Y" will end the process.

If the user wants to continue the process entering "N" or "n" will take the user back with all the selected fields still in place.

### Using fewer than four user fields.

If only one, two, or three user-selected fields are desired the "Done" option (24) may be selected in lieu of another field. This tells the program to start running the report with just the fields already selected.

## Directing Output

After all the desired fields have been selected, the composition of the report, as defined by the user, is displayed and the user is prompted for a destination. This step is the same regardless of the file being used.

```
Report: User-defined HRPER Data Report                                (R.UD.HRP)

Composition has been defined.

Col 2- @ID FMT '5L' COL.HDG 'Class}Code'
Col 3- H20.CLS.GRADE
Col 4- H20.CLS.PAYCLASS FMT '3L' COL.HDG 'Pay}Cls'
Col 5- H20.CLS.BARG.UNIT
Col 6- H20.CLS.SHORT.TITLE
-----

Send output to 1. Printer
                2. Screen
                3. HOLD as a .dif file (Filename: HRDEV.TEMP)
                4. HOLD as a .txt file (Filename: HRDEV.TEMP)

                [Enter] to Cancel

=====
Choice1->
```

## Output to Printer

When option 1 is selected the user is prompted

**Enter header message....:**

This is the one line text that is printed in the header of each page of the report. It may be left blank if so desired.

The output is then sent to the user's currently defined Unix printer. The left margin will vary depending on the number of fields selected.

### Oops.

Entering an exclamation point (!) at the header message prompt or the printer prompt will take the user back to the beginning and allow re-selection of fields.

### Altered format

If the combined length of all the fields on a report plus left margin and spaces between columns exceeds 256 the data will appear in a vertical format rather than a columnar format.

Hillsborough Community College  
 \*\*\* USER-DEFINED H20.CLASSIFICATIONS DATA REPORT \*\*\*  
 EXAMPLE

09-12-05

Page 1

#.	Class Code.	Grade	Pay Cls	Barg Unit.	Short Title.....
1.	F3500		FPC		PT Counselor
2.	F2500		FPC		PT Librarian
3.	F1600		FPN		PT Instructor, NCred
4.	Z9902		NPT		Assistant Coach
5.	Z9901		NPT		Head Coach
6.	A0101	1	AFT		College President
7.	Z0100	1	NPT		PT Assistant
8.	Z0101	1	NPT		PT FWS Assistant
9.	Z0102	1	NPT		PT Student Assistant
10.	A0201	2	AFT		VP, Operations, Sr
11.	Z0200	2	NPT		PT Technician
12.	A0301	3	AFT		Campus President
13.	A0304	3	AFT		College Attorney
14.	A0303	3	AFT		VP, Admin / CFO
15.	A0302	3	AFT		VP, Educ & Stu Devel
16.	Z0300	3	NPT		PT Advanced Tech
17.	A0402	4	AFT		Dir, Student Svcs
18.	A0401	4	AFT		VP, Info Technology
19.	Z0400	4	NPT		PT Specialist
20.	A0514	5	AFT		Asst to President
21.	A0513	5	AFT		Dean, Academic Affrs
22.	A0512	5	AFT		Dean, Arts & Sci
23.	A0511	5	AFT		Dean, Assoc Science
24.	A0510	5	AFT		Dean, Assoc of Arts
25.	A0509	5	AFT		Dean, Env & Tech Prg
26.	A0508	5	AFT		Dean, Health Well Sp
27.	A0507	5	AFT		Dean, Student Svcs
28.	A0506	5	AFT		Dir, Assoc Arts Prog
29.	A0504	5	AFT		Dir, Human Resources
30.	A0502	5	AFT		Dir, Technical Progr
31.	A0501	5	AFT		ExDir, Mktg & PubRel
32.	A0503	5	AFT		ExDir, Str Pln & Rsr
33.	A0505	5	AFT		Exec Dir, Foundation
34.	Z0500	5	NPT		PT Associate
35.	A0605	6	AFT		Controller
36.	A0604	6	AFT		Dean, Comm Svc Prog
37.	A0608	6	AFT		Dir, Admin Systems
38.	A0602	6	AFT		Dir, Facilities
39.	A0603	6	AFT		Dir, Inst'l Research
40.	A0607	6	AFT		Dir, Network/Telecom
41.	A0601	6	AFT		ExDir, Econom Devel
42.	A0606	6	AFT		ExDir, FL-ATE
43.	A0708	7	AFT		Dir, Academic Tech
44.	A0707	7	AFT		Dir, Financial Aid
45.	A0706	7	AFT		Dir, Financial Svcs
46.	A0705	7	AFT		Dir, Inst Adv Spl Pr
47.	A0704	7	AFT		Dir, Internat'l Educ
48.	A0703	7	AFT		Dir, Mgt Info Sys
49.	A0702	7	AFT		Dir, Mkt & Creat Svc
50.	A0701	7	AFT		Dir, Purchasing

HR Custom Report: R.UD.CLS (v1)

Saved list: RSMITH.CLS.TEMP

## Output to Screen

When option 2 is selected the user is prompted

**Enter header message....:**

This is the one line text that is printed in the header of each page of the report. It may be left blank if so desired.

### Oops.

Entering an exclamation point (!) at the header message prompt or the printer prompt will take the user back to the beginning and allow re-selection of fields.

The output is then sent to the user's screen with a zero left margin.

```

                                Hillsborough Community College
                                *** USER-DEFINED H20.CLASSIFICATIONS DATA REPORT ***
09-12-05                                EXAMPLE                                Page 1

```

#.	Class Code.	Grade	Pay Cls	Barg Unit.	Short Title.....
1.	F3500		FPC		PT Counselor
2.	F2500		FPC		PT Librarian
3.	F1600		FPN		PT Instructor, NCred
4.	Z9902		NPT		Assistant Coach
5.	Z9901		NPT		Head Coach
6.	A0101	1	AFT		College President
7.	Z0100	1	NPT		PT Assistant
8.	Z0101	1	NPT		PT FWS Assistant
9.	Z0102	1	NPT		PT Student Assistant
10.	A0201	2	AFT		VP, Operations, Sr
11.	Z0200	2	NPT		PT Technician
12.	A0301	3	AFT		Campus President
13.	A0304	3	AFT		College Attorney
14.	A0303	3	AFT		VP, Admin / CFO
15.	A0302	3	AFT		VP, Educ & Stu Devel
16.	Z0300	3	NPT		PT Advanced Tech
17.	A0402	4	AFT		Dir, Student Svcs
18.	A0401	4	AFT		VP, Info Technology
19.	Z0400	4	NPT		PT Specialist
20.	A0514	5	AFT		Asst to President
21.	A0513	5	AFT		Dean, Academic Affrs
22.	A0512	5	AFT		Dean, Arts & Sci
<hr/>					
41.	A0601	6	AFT		ExDir, Econom Devel
42.	A0606	6	AFT		ExDir, FL-ATE
43.	A0708	7	AFT		Dir, Academic Tech
44.	A0707	7	AFT		Dir, Financial Aid
45.	A0706	7	AFT		Dir, Financial Svcs
46.	A0705	7	AFT		Dir, Inst Adv Spl Pr
47.	A0704	7	AFT		Dir, Internat'l Educ
48.	A0703	7	AFT		Dir, Mgt Info Sys
49.	A0702	7	AFT		Dir, Mkt & Creat Svc
50.	A0701	7	AFT		Dir, Purchasing

```

HR Custom Report: R.UD.CLS (v1)                                Saved list: RSMITH.CLS.TEMP
Done! Press any key to continue...

```

## Output to HOLD as a .dif File

When option 3 is selected the report is immediately written to the HOLD file in the universal .dif format. A .dif file can be opened directly from spreadsheet programs such as Excel.

```

Choicel-> 3

50 records retrieved to list 0.
DOWNLOAD version 7.11
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT DIF
Using input file HRPER
Output to file _HOLD_ RSMITH.TEMP

*****
50 records processed.
Done! Press any key to continue...
    
```

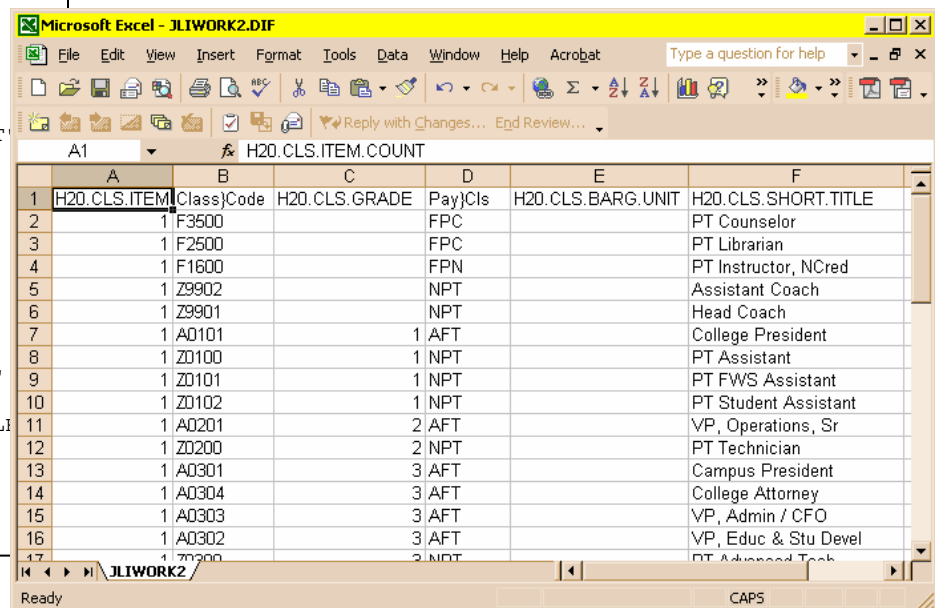
The file is given the name **x.TEMP** where *x* is the user's username. In this example the user is R. Smith.

```

TABLE
0,1
"Download"
VECTORS
0,6
" "
TUPLES
0,0
" "
DATA
0,0
" "
-1,0
BOT
1,0
"H20.CLS.ITEM.COUNT"
1,0
"Class}Code"
1,0
"H20.CLS.GRADE"
1,0
"Pay}Cls"
1,0
"Pay}Cls"
1,0
"H20.CLS.BARG.UNIT"
1,0
"H20.CLS.SHORT.TITL"
-1,0
BOT
0,1.
V
    
```

When viewed in the HOLD file data looks like a long vertical list.

However, when downloaded to the PC and opened in Excel it looks more familiar.



Note that when imported into a spreadsheet the line count column shows a 1 for every row.

## Output to HOLD as a .txt File

When option 4 is selected the report is immediately written to the HOLD file in the universal .txt format. In such a file, each data element is inclosed in quotes and data elements are separated by commas.

A .txt file can be imported into many database and spreadsheet programs but some formatting adjustments may be necessary.

```
Choice1-> 4

50 records retrieved to list 0.
DOWNLOAD version 7.11
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
Using input file HRPER
Output to file _HOLD_ RSMITH.TEMP

****
50 records processed.
Done! Press any key to continue...
```

The file is given the name **x.BLUE** where *x* is the user's username. In this example the user is R. Smith.

A comma-delimited .txt file as it appears in the HOLD file.

```
"H20.CLS.ITEM.COUNT", "Class}Code", "H20.CLS.GRADE", "Pay}Cls", "H20.CLS.BARG.UNIT"
1., "F3500", "", "FPC", "", "PT Counselor"
1., "F2500", "", "FPC", "", "PT Librarian"
1., "F1600", "", "FPN", "", "PT Instructor, NCred"
1., "Z9902", "", "NPT", "", "Assistant Coach"
1., "Z9901", "", "NPT", "", "Head Coach"
1., "A0101", "1", "AFT", "", "College President"
1., "Z0100", "1", "NPT", "", "PT Assistant"
1., "Z0101", "1", "NPT", "", "PT FWS Assistant"
1., "Z0102", "1", "NPT", "", "PT Student Assistant"
1., "A0201", "2", "AFT", "", "VP, Operations, Sr"
1., "Z0200", "2", "NPT", "", "PT Technician"
1., "A0301", "3", "AFT", "", "Campus President"
1., "A0304", "3", "AFT", "", "College Attorney"
1., "A0303", "3", "AFT", "", "VP, Admin / CFO"
1., "A0302", "3", "AFT", "", "VP, Educ & Stu Devel"
1., "Z0300", "3", "NPT", "", "PT Advanced Tech"
1., "A0402", "4", "AFT", "", "Dir, Student Svcs"
1., "A0401", "4", "AFT", "", "VP, Info Technology"
1., "Z0400", "4", "NPT", "", "PT Specialist"
1., "A0514", "5", "AFT", "", "Asst to President"
1., "A0513", "5", "AFT", "", "Dean, Academic Affrs"
```

---

## Section 5. *User-Defined Operations on the BENDED File*

---

From this menu the user may navigate to BENDED saved list builders, the sort utility and the report itself.

```
OHR|BEN|BND
BENDED Actions & Reports

  1. Create BENDED saved list
  2. Sort BENDED saved list

  3. BENDED Reference Report      (saved list optional)
  4. User-Defined BENDED Report   (saved list required)

[Enter] to Quit

=====
Choice->
```

Option 1 takes the user to the a saved list builder menu where BND (BENDED) saved list lists may be created in various ways. For user-defined reports purposes, any BND saved list will work, regardless of how or where it was created. See the Introduction to HR Custom Reports Training Guide and Reference for detailed information on building saved lists.

## User-Defined BND Saved List Sorter

This saved list sorter works on any BND saved list. It allows the user to sort a list on the same fields that may be placed on the user-defined BND report.

```
Process: Sort BENDED saved list                                (P.BENDED.SORT)

Descr..: Takes BD saved list name from user and sorts it.

        User selects up to four fields (below), in any order, by which to
        sort the saved list. This allows 212,520 possible sort orders.

Calc Method          GL Matching Piece          Type
Cost Rec End Date   GL Match Piece Descr      Type Description
Cost Rec Start Date ID                      Vendor Pymnt Period
Description         Institutional Benefit      Ven Pymnt Per Desc
End Date           Payers                      Withholding Priority
GL Distribution     Payers Description
GL Distribution Descr Period Code
GL Liability Acct  Regulation Reference
GL Liab Acct Descript Start Date

=====

Name of BND saved list to be sorted ([Enter] to cancel).
: BND.TEMP
50 records retrieved to list 0.
Press any key to continue...
```

To start, the user enters the name of a BND saved list. If a saved list by that name exists, its count will be reported, otherwise the user will be advised that it cannot be found.

**Caution!** Use only a BND saved list. If you enter the name of an existing saved list created on any other file, HRPER for example, it will be opened but error messages will appear when sorting begins

```

Process: Sort BENDED saved list                                (P.BENDED.SORT)

Descr.: Make up to 4 selections, pressing [Enter] after each.

  1. Calc Method          10. GL Matching Piece      19. Type
  2. Cost Rec End Date   11. GL Match Piece Descr  20. Type Description
  3. Cost Rec Start Date 12. ID                    21. Vendor Pymnt Period
  4. Description         13. Institutional Benefit 22. Ven Pymnt Per Desc
  5. End Date           14. Payers                23. Withholding Priority
  6. GL Distribution     15. Payers Description    -----
  7. GL Distribution Descr 16. Period Code          24. Done! No more picks
  8. GL Liability Acct   17. Regulation Reference
  9. GL Liab Acct Descript 18. Start Date           [Enter] Quit

-----
1ST SORT-
2ND SORT-
3RD SORT-
4TH SORT-
=====
Choice->

```

After a saved list has been identified, the user is presented with a list of 23 fields. The user enters the number of the desired field. In this example option 13, representing the Institutional Benefit Code has been selected. That field name is then displayed and the user is prompted for another pick.

```

-----
1ST SORT- BY BD.INSTITUTIONAL.BENEFIT
2ND SORT-
3RD SORT-
4TH SORT-
=====
Choice->

```

The user then selects another field as the second sort. Here, Withholding Priority has been selected.

```

-----
1ST SORT- BY BD.INSTITUTIONAL.BENEFIT
2ND SORT- BY BD.WITHHOLDING.PRIORITY
3RD SORT-
4TH SORT-
=====
Choice->

```

The user then selects another field as the third sort. Here, Description has been selected.

```
-----  
1ST SORT- BY BD.INSTITUTIONAL.BENEFIT  
2ND SORT- BY BD.WITHHOLDING.PRIORITY  
3RD SORT- BY BD.DESC  
4TH SORT-  
=====
```

Choice->

The user then selects another field as the final sort. Here, Start-Date has been selected.

```
-----  
1ST SORT- BY BD.INSTITUTIONAL.BENEFIT  
2ND SORT- BY BD.WITHHOLDING.PRIORITY  
3RD SORT- BY BD.DESC  
4TH SORT- BY BD.START.DATE  
=====
```

Thank you. Please wait...

50 records retrieved to list 0.

RSMITH.BD.TEMP has been resorted. Press any key to continue...

After the last desired sort field has been selected the saved list sorting automatically begins and the user is advised when it is finished. The sorting process is complete and the screen can be exited.

### Using fewer than four sorts.

If only one, two, or three sorts are desired the "Done" option (25) may be selected in lieu of another field. This tells the program to start the sort with just the fields already selected.

## User-Defined BND Report (R.UD.BENDEd)

This report generator works on any BND (BENDEd) saved list. It allows the user to select up to four fields to be shown on the report. The screen lists the same fields as seen on the saved list sorter except for ID which is automatically included in any report created.

```
Report: User-defined BENDEd Data Report (R.UD.BENDEd)
Descr.: Shows any 4 BENDEd data elements chosed by user.

User selects up to four fields (below), in any order, to appear on
report. Column order determined by sequence that fields are selected.
Data order determined by saved list which is required. Saved list
should be sorted prior to running this report.

Calc Method          GL Matching Piece      Type
Cost Rec End Date    GL Match Piece Descr   Type Description
Cost Rec Start Date  ID                      Vendor Pymnt Period
Description           Institutional Benefit   Ven Pymnt Per Desc
End Date             Payers                 Withholding Priority
GL Distribution       Payers Description
GL Distribution Descr Period Code
GL Liability Acct     Regulation Reference
GL Liab Acct Descrip Start Date
=====
Name of BND saved list to be used ([Enter] to cancel).
: BND.TEMP

Overwriting existing select list.
50 records retrieved to list 0.
Press any key to continue...
```

To start, the user enters the name of a BND saved list. If a saved list by that name exists, its count will be reported, otherwise the user will be advised that it cannot be found.

**Caution!** Use only a saved list built on the BENDEd file. If you enter the name of an existing saved list created on any other file, HRPER for example, it will be opened but it will NOT work. Error messages or long lists of IDs may appear on screen or on the printed report.

```

Report: User-defined BENDED Data Report                                (R.UD.BENDED)
Desc.: Pick up to 4 fields, pressing [Enter] after each.

  1. Calc Method                10. GL Matching Piece        19. Type
  2. Cost Rec End Date         11. GL Match Piece Descr    20. Type Description
  3. Cost Rec Start Date      12. ID                      21. Vendor Pymnt Period
  4. Description               13. Institutional Benefit   22. Ven Pymnt Per Desc
  5. End Date                  14. Payers                  23. Withholding Priority
  6. GL Distribution           15. Payers Description      -----
  7. GL Distribution Descr    16. Period Code            24. Done! No more picks
  8. GL Liability Acct        17. Regulation Reference
  9. GL Liab Acct Descript    18. Start Date              [Enter] Quit
-----
Col 2- @ID FMT '4L' COL.HDG 'ID'
Col 3-
Col 4-
Col 5-
Col 6-
=====
Choice->

```

After a saved list has been identified, the screen is redisplayed with all of the available fields numbered. The user is prompted to select any of 23 fields. The user enters the number of the desired field. In this example option 13, representing the Institutional Benefit Code has been selected. That field name is then displayed and the user is prompted for another pick.

```

-----
Col 2- @ID FMT '4L' COL.HDG 'ID'
Col 3- BD.INSTITUTIONAL.BENEFIT
Col 4-
Col 5-
Col 6-
=====
Choice->

```

The user then selects another field for column 4. Here, Withholding Priority has been selected.

```

-----
Col 2- @ID FMT '4L' COL.HDG 'ID'
Col 3- BD.INSTITUTIONAL.BENEFIT
Col 4- BD.WITHHOLDING.PRIORITY
Col 5-
Col 6-
=====
Choice->

```

The user then selects another field for column 5. Here, Description has been selected.

```
-----  
Col 2- @ID FMT '4L' COL.HDG 'ID'  
Col 3- BD.INSTITUTIONAL.BENEFIT  
Col 4- BD.WITHHOLDING.PRIORITY  
Col 5- BD.DESC COL.HDG 'Description'  
Col 6-  
=====
```

Choice->

The user then selects another field for column 6. Here, Start Date has been selected.

```
-----  
Col 2- @ID FMT '4L' COL.HDG 'ID'  
Col 3- BD.INSTITUTIONAL.BENEFIT  
Col 4- BD.WITHHOLDING.PRIORITY  
Col 5- BD.DESC COL.HDG 'Description'  
Col 6- BD.START.DATE COL.HDG 'Start-Dt'  
=====
```

When a field for column 6 has been selected the user is taken immediately to the output screen where the destination of the report can be picked. See the "Directing Output" section below for more information.

### Canceling.

Pressing <Enter> at any Choice-> prompt will cause the field selection to be cancelled and the screen exited. In case the user has pressed <Enter> by mistake and really does not intend to abort, the following prompt is displayed.

Do you really want to cancel? [Y]/N:

The default value here is "Y", as indicated by the bracket, so if the user wants to exit, pressing <Enter> again, or entering "Y" will end the process.

If the user wants to continue the process entering "N" or "n" will take the user back with all the selected fields still in place.

### Using fewer than four user fields.

If only one, two, or three user-selected fields are desired the "Done" option (24) may be selected in lieu of another field. This tells the program to start running the report with just the fields already selected.

## Directing Output

After all the desired fields have been selected, the composition of the report, as defined by the user, is displayed and the user is prompted for a destination. This step is the same regardless of the file being used.

```
Report: User-defined HRPER Data Report                                (R.UD.HRP)

Composition has been defined.

Col 2- @ID FMT '4L' COL.HDG 'ID'
Col 3- BD.INSTITUTIONAL.BENEFIT
Col 4- BD.WITHHOLDING.PRIORITY
Col 5- BD.DESC COL.HDG 'Description'
Col 6- BD.START.DATE COL.HDG 'Start-Dt'
-----

Send output to 1. Printer
                2. Screen
                3. HOLD as a .dif file (Filename: HRDEV.TEMP)
                4. HOLD as a .txt file (Filename: HRDEV.TEMP)

                [Enter] to Cancel

=====
Choice1->
```

## Output to Printer

When option 1 is selected the user is prompted

**Enter header message....:**

This is the one line text that is printed in the header of each page of the report. It may be left blank if so desired.

The output is then sent to the user's currently defined Unix printer. The left margin will vary depending on the number of fields selected.

### Oops.

Entering an exclamation point (!) at the header message prompt or the printer prompt will take the user back to the beginning and allow re-selection of fields.

### Altered format

If the combined length of all the fields on a report plus left margin and spaces between columns exceeds 256 the data will appear in a vertical format rather than a columnar format.

Hillsborough Community College  
 \*\*\* USER-DEFINED BENDED DATA REPORT \*\*\*  
 EXAMPLE

09-12-05

Page 1

#..	ID..	Ben	Ins	WHD	PRI	Description.....	Start-Dt
1.	ADEF	N				Additional Deferral	01/01/99
2.	AFIC	N				Alternate FICA	05/01/96
3.	AAET	N	80			Aetna Annuity 403B	07/01/68
4.	AAE7	N	80			Aetna Annuity 457	01/22/02
5.	AAME	N	80			American Express Annuity	07/01/68
6.	ABE1	N	80			Bencore 401A	12/14/01
7.	AEQU	N	80			Equitable Annuity	07/01/68
8.	AFRA	N	80			Franklin Annuity	07/01/68
9.	AFEM	N	80			Franklin Templeton Annuity	07/01/68
10.	AGAM	N	80			Great American Annuity	07/01/68
11.	AHOR	N	80			Horace Mann Annuity	07/01/68
12.	AMAS	N	80			Mass Mutual	07/01/68
13.	AMET	N	80			Met Life Annuity	07/01/68
14.	ANOR	N	80			Northern Annuity	07/01/68
15.	ASOU	N	80			SW Annuity	07/01/68
16.	ASEC	N	80			Security First Annuity	07/01/68
17.	ASCU	N	80			Suncoast Annuity 403B	07/01/68
18.	ASC7	N	80			Suncoast Annuity 457	01/22/02
19.	ATRO	N	80			T. Rowe Price Annuity	07/01/68
20.	ATI7	N	80			TIAA/CREF 457	03/05/02
21.	ATIA	N	80			Tiaa/Cref Annuity	07/01/68
22.	ATRA	N	80			Travelers Annuity	07/01/05
23.	AVA7	N	80			Valic 457	12/14/01
24.	AVAL	N	80			Valic Annuity	07/01/68
25.	AVAN	N	80			Vanguard Annuity	07/01/68
26.	AWAS	N	80			Washington Annuity	07/01/68
27.	EFAC	N	85			FACC Dues	07/01/68
28.	EFUS	N	85			FUSA Dues	07/01/68
29.	EHCF	N	85			HCC Foundation	07/01/68
30.	EFON	N	85			Personal Cell Phone Usage	07/01/04
31.	DHFA	Y	50			A.D.P. HMO E+family Post-Tax	06/01/99
32.	DHSA	Y	50			A.D.P. HMO E+spouse Post-Tax	06/01/99
33.	DISA	Y	50			A.D.P. PPO E+spouse Post-Tax	06/01/99
34.	DHCA	Y	50			A.D.P.HMO E+child(ren)post-Tx	06/01/99
35.	DICA	Y	50			A.D.P.PPO E+child(ren)post-Tx	06/01/99
36.	CANF	Y	50			AFLAC CANCER INSURANCE	07/01/04
37.	CANG	Y	50			Aig Cancer Insurance	07/01/04
38.	CANA	Y	50			American Heritage Cancer	07/01/04
39.	CANC	Y	50			Colonial Cancer Insurance	07/01/04
40.	CUL	Y	50			Colonial Universal Life	07/01/97
41.	DHCB	Y	50			Dental DMO E+Children	06/01/99
42.	DHAB	Y	50			Dental DMO E+Family	06/01/99
43.	DHSB	Y	50			Dental DMO E+Spouse	06/01/99
44.	DHE	Y	50			Dental DMO Single	06/01/99
45.	DPCB	Y	50			Dental PPO E+Children	05/13/04
46.	DPAB	Y	50			Dental PPO E+Family	05/13/04
47.	DPSB	Y	50			Dental PPO E+Spouse	05/13/04
48.	DPE	Y	50			Dental PPO Single	05/13/04
49.	ACC	Y	50			Reimbursement - Day Care	01/01/98
50.	AFS	Y	50			Reimbursement - Medical	01/01/98

HR Custom Report: R.UD.BENDE (v1)

Saved list: RSMITH.BND.TEMP

## Output to Screen

When option 2 is selected the user is prompted

**Enter header message....:**

This is the one line text that is printed in the header of each page of the report. It may be left blank if so desired.

### Oops.

Entering an exclamation point (!) at the header message prompt or the printer prompt will take the user back to the beginning and allow re-selection of fields.

The output is then sent to the user's screen with a zero left margin.

```

Hillsborough Community College
*** USER-DEFINED BENDED DATA REPORT ***
09-12-05                               EXAMPLE                               Page 1
#.. ID.. Ins WHD
Description..... Start-Dt
1. ADEF N      Additional Deferral      01/01/99
2. AFIC N      Alternate FICA      05/01/96
3. AAET N      80 Aetna Annuity 403B      07/01/68
4. AAE7 N      80 Aetna Annuity 457      01/22/02
5. AAME N      80 American Express Annuity      07/01/68
6. ABE1 N      80 Bencore 401A      12/14/01
7. AEQU N      80 Equitable Annuity      07/01/68
8. AFRA N      80 Franklin Annuity      07/01/68
9. ATEM N      80 Franklin Templeton Annuity      07/01/68
10. AGAM N      80 Great American Annuity      07/01/68
11. AHOR N      80 Horace Mann Annuity      07/01/68
12. AMAS N      80 Mass Mutual      07/01/68
13. AMET N      80 Met Life Annuity      07/01/68
14. ANOR N      80 Northern Annuity      07/01/68
15. ASOU N      80 SW Annuity      07/01/68
16. ASEC N      80 Security First Annuity      07/01/68
17. ASCU N      80 Suncoast Annuity 403B      07/01/68
18. ASC7 N      80 Suncoast Annuity 457      01/22/02
19. ATRO N      80 T. Rowe Price Annuity      07/01/68
20. ATI7 N      80 TIAA/CREF 457      03/05/02
21. ATIA N      80 Tiaa/Cref Annuity      07/01/68
22. ATRA N      80 Travelers Annuity      07/01/05
23. AVA7 N      80 Valic 457      12/14/01
-----
40. CUL Y      50 Colonial Universal Life      07/01/97
41. DHCB Y      50 Dental DMO E+Children      06/01/99
42. DHAB Y      50 Dental DMO E+Family      06/01/99
43. DHSB Y      50 Dental DMO E+Spouse      06/01/99
44. DHE Y      50 Dental DMO Single      06/01/99
45. DPCB Y      50 Dental PPO E+Children      05/13/04
46. DPAB Y      50 Dental PPO E+Family      05/13/04
47. DPSB Y      50 Dental PPO E+Spouse      05/13/04
48. DPE Y      50 Dental PPO Single      05/13/04
49. ACC Y      50 Reimbursement - Day Care      01/01/98
50. AFS Y      50 Reimbursement - Medical      01/01/98
-----
HR Custom Report: R.UD.BENDED (v1)                               Saved list: RSMITH.BND.TEMP
Done! Press any key to continue...
```

## Output to HOLD as a .dif File

When option 3 is selected the report is immediately written to the HOLD file in the universal .dif format. A .dif file can be opened directly from spreadsheet programs such as Excel.

```

Choicel-> 3

50 records retrieved to list 0.
DOWNLOAD version 7.11
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT DIF
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT DIF
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT DIF
Using input file BENDED
Output to file _HOLD_ RSMITH.TEMP

*****
50 records processed.
Done! Press any key to continue...
    
```

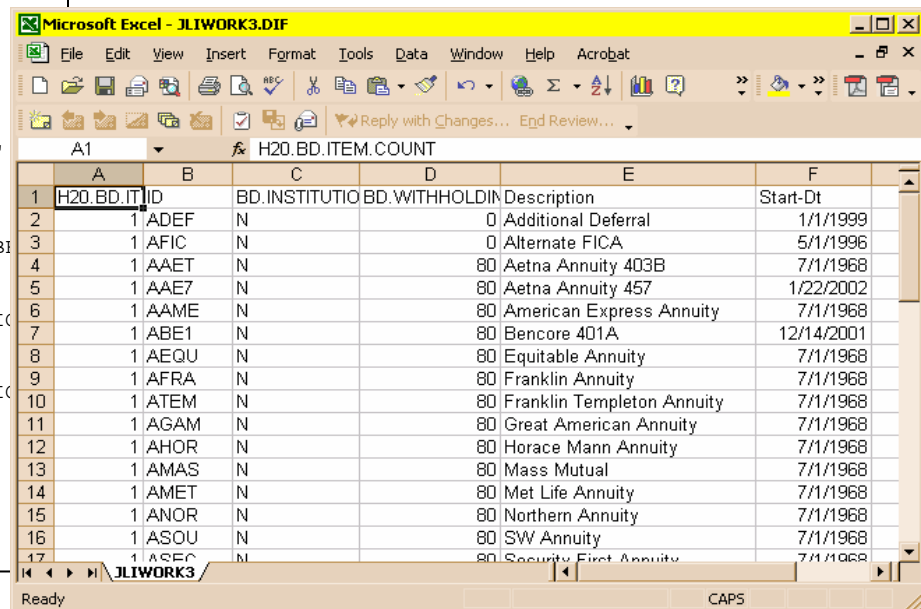
The file is given the name **x.TEMP** where *x* is the user's username. In this example the user is R. Smith.

```

TABLE
0,1
"Download"
VECTORS
0,6
" "
TUPLES
0,0
" "
DATA
0,0
" "
-1,0
BOT
1,0
"H20.BD.ITEM.COUNT"
1,0
"ID"
1,0
"BD.INSTITUTIONAL.BI
FIT"
1,0
"BD.WITHHOLDING.PRI
TY"
1,0
"BD.WITHHOLDING.PRI
TY"
1,0
"Description"
1,0
"Start-Dt"
-1,0
    
```

When viewed in the HOLD file data looks like a long vertical list.

However, when downloaded to the PC and opened in Excel it looks more familiar.



Note that when imported into a spreadsheet the line count column shows a 1 for every row.

## Output to HOLD as a .txt File

When option 4 is selected the report is immediately written to the HOLD file in the universal .txt format. In such a file, each data element is inclosed in quotes and data elements are separated by commas.

A .txt file can be imported into many database and spreadsheet programs but some formatting adjustments may be necessary.

```
Choice1-> 4

50 records retrieved to list 0.
DOWNLOAD version 7.11
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
WHICH.QUALIFIER COL.HDG
DLMAIN.FORMAT COMMA
Using input file HRPER
Output to file _HOLD_ RSMITH.TEMP

****
50 records processed.
Done! Press any key to continue...
```

The file is given the name **x.TEMP** where *x* is the user's username. In this example the user is R. Smith.

A comma-delimited .txt file as it appears in the HOLD file.

```
"H20.BD.ITEM.COUNT", "ID", "BD.INSTITUTIONAL.BENEFIT", "BD.WITHHOLDING.PRIORITY", "
1., "ADEF", "N", "Additional Deferral", "01/01/99"
1., "AFIC", "N", "Alternate FICA", "05/01/96"
1., "AAET", "N", 80, "Aetna Annuity 403B", "07/01/68"
1., "AAE7", "N", 80, "Aetna Annuity 457", "01/22/02"
1., "AAME", "N", 80, "American Express Annuity", "07/01/68"
1., "ABE1", "N", 80, "Bencore 401A", "12/14/01"
1., "AEQU", "N", 80, "Equitable Annuity", "07/01/68"
1., "AFRA", "N", 80, "Franklin Annuity", "07/01/68"
1., "ATEM", "N", 80, "Franklin Templeton Annuity", "07/01/68"
1., "AGAM", "N", 80, "Great American Annuity", "07/01/68"
1., "AHOR", "N", 80, "Horace Mann Annuity", "07/01/68"
1., "AMAS", "N", 80, "Mass Mutual", "07/01/68"
1., "AMET", "N", 80, "Met Life Annuity", "07/01/68"
1., "ANOR", "N", 80, "Northern Annuity", "07/01/68"
1., "ASOU", "N", 80, "SW Annuity", "07/01/68"
1., "ASEC", "N", 80, "Security First Annuity", "07/01/68"
1., "ASCU", "N", 80, "Suncoast Annuity 403B", "07/01/68"
1., "ASC7", "N", 80, "Suncoast Annuity 457", "01/22/02"
1., "ATRO", "N", 80, "T. Rowe Price Annuity", "07/01/68"
1., "ATI7", "N", 80, "TIAA/CREF 457", "03/05/02"
1., "ATIA", "N", 80, "Tiaa/Cref Annuity", "07/01/68"
```