Project Betty: RL Extract Specification for Bulk Staff Loader to Access People Planner

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Author Paul Rose**

**Owner Gordon Bourne**

**Sponsor Kris Peach**

**Business Stream Extra Care**

**Distribution Core Project Team, Business Systems**

**Issue Date 02/02/2021**

**Version** 1.2

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contents

[**1.1.** **Aim** 3](#_Toc62655748)

[**1.2.** **General Data Observations** 3](#_Toc62655749)

[**1.3.** **Data Extract Criteria** 3](#_Toc62655750)

[**1.4.** **Exception Report Criteria** 3](#_Toc62655751)

[**1.5.** **Data Fields and Field Criteria for RL Extract** 4](#_Toc62655752)

[**1.6.** **File Output Requirements** 9](#_Toc62655753)

[**1.7.** **Run Requirements** 9](#_Toc62655754)

### **Aim**

Provide the layout and requirements of the ResourceLink (RL) extract file needed for the Bulk Load of Staff to Access People Planner (PP). Prior to the full availability of API End Points for Staff Posts it is recommended that the initial load of staff details to People Planner by Scheme is done through the Spreadsheet Import Process in PP which allows Custom Field import, thereby saving all the manual input of Custom Field information, which for Staff is Staff Post information.

Since this will be a task that is performed by one of the Project Team for Betty then it will suffice as an executable piece of SQL against the latest update of RL tables available on Data Warehouse (DW).

### **General Data Observations**

Data held in copies of RL tables that sit in the DW can be utilised to create this extract. It may require some more tables to be brought across from the hosted version of RL on a nightly basis to fulfil the overall data requirements, this should not be an issue as these same data sources will be required for the bigger piece of work around API’s into PP so having them added to DW as extra tables would be of longer term advantage.

Some of the RL fields may already exist in defined views within DW.

All field values will need to be trimmed/truncated on output.

PP uses Latin 1 as the character set, this is the same as DW.

### **Data Extract Criteria**

The extract criteria as to which staff members are to appear on the extract are:

* Scheme to be advised by requestor
* Date of data cut required to be advised by requestor
* All current staff on the advised scheme at the data cut date:
  + where termination date either blank or greater than today
  + AND
  + where the current main post scheme is equal to advised scheme

where a current secondary post is equal to advised scheme)

*Note: This data extract is only required as one-off for each scheme as they go onto People Planner.*

*Data refresh of staff data once on People Planner will be via API processes.*

### **Exception Report Criteria**

* Exception report needed to show any current staff who have a current secondary post that relates to the advised scheme
  + These staff are not to be included on the extract though as will have to be dealt with manually for People Planner
  + Show all of the same extract fields on the exceptions report to allow manual intervention

### **Data Fields and Field Criteria for RL Extract**

The following table outlines the required data fields for the People Planner Staff Spreadsheet Loader, output titles are shown in the last column headed ‘Access Staff Spreadsheet Loader Field Title’.

A handful of RL fields are unknown at present, question is with HR Systems as to what tables and field names are, will advise / update specification once known.

|  |  |  |  |
| --- | --- | --- | --- |
| **ResourceLink Field Description** | **ResourceLink Table & Field Names** | **Selection / Output Criteria** | **Access Staff Spreadsheet Loader Field Title** |
|  |  |  |  |
| Title | [D500M].[TITLE] |  | Title.TitleDescription |
| First Name | [D500M].[FIRST\_FORNAME] |  | Employee.EmployeeFirstName |
| Middle Name Initial | [D500M].[OTHER\_FORENAMES] | First initial of each name separated by space | Employee.EmployeeMiddleInitial |
| Surname | [D500M].[SURNAME] |  | Employee.EmployeeLastName |
| Known As | [D500M].[KNOWN\_AS] |  | Employee.EmployeePreferredName |
| Gender | [D500M].[SEX] | If 'F' then output 'Female', if 'M' then output 'Male' | Gender.GenderDescription |
| N/A | - | Set as 'Unknown' | EthnicOrigin.EthnicOriginDescription |
| N/A | - | Set as 'Unknown' | MaritalStatus.MaritalStatusDescription |
| Address Line 1 | [PERSADDR].[LINE\_ONE] | Ensure no embeded commas in output | Employee.EmployeeAddressLine1 |
| Address Line 2 | [PERSADDR].[LINE\_TWO] | Ensure no embeded commas in output | Employee.EmployeeAddressLine2 |
| Address Line 3 | [PERSADDR].[LINE\_THREE] | Ensure no embeded commas in output | Employee.EmployeeAddressCityTown |
| Address Line 4 | [PERSADDR].[LINE\_FOUR] | Ensure no embeded commas in output | Employee.EmployeeAddressCounty |
| Postcode | [PERSADDR].[POSTCODE] | Must be in standard postcode format | Employee.EmployeeAddressZipPostCode |
| Date of Birth | [D500M].[BIRTH\_DATE] | Format 'dd/mm/yyyy' | Employee.EmployeeDateOfBirth |
| Start Date / Continuous Start Date (earliest of) | [D550M].[START\_DATE] | Format 'dd/mm/yyyy' | Employee.EmployeeStartDate |
| Post Class from Main Post | [D200M].[CLASS] | When Main Post Indicator = Y and Post End Date is blank | EmployeeType.EmployeeTypeDescription |
| Post Title from Main Post | [D200M].[LONG\_DESC] | When Main Post Indicator = Y and Post End Date is blank | PositionType.PositionTypeDescription |
| Scheme Name (QL Name) from Main Post | [D100PR8].[LONG\_DESC] | Must match QL Scheme Description | Branch.BranchDescription |
| N/A | - | Set as 'Care Delivery' | BranchArea.BranchAreaDescription |
| Active unless Leave Date passed (Terminated) | [D550M].[END\_DATE] | If Blank, then set as 'Active', if not blank and date > today then set as 'Terminating', if not blank and date <= today then set as 'Terminated' | Employee.EmployeeStatus |
| If on Work Visa | [TEMPRTW].[DATA\_VALUE] |  | Eligibility.EligibilityDescription |
| If on Work Visa, Expiry Date | [TEMPEXP].[DATA\_VALUE] | Looks like there is also a 'Temp RTW Extend Date' field, TEMPEXTD | Eligibility.EligibilityExpires |
| If on Work Visa, Details | [T\_RTW\_C].[DATAVALUE] |  | Eligibility.EligibilityNotes |
| NI Number | [D500M].[NI\_NO] |  | Employee.EmployeeSSNNI |
| Payroll Short Description (Weekly or Monthly28) | [CNTRLGRP].[SHORT\_DESC] | To output 'Weekly' or 'Monthly28' | PayrollRun.PayrollRunDescription |
| RL Employee Number (with leading zeros) | [D550M].[EMPLOYEE\_NUMBER] | To include Leading Zero's | Employee.EmployeeExternalID |
| N/A | - | For New Starter Weekly - set as 'H21 Weekly' Fore New Starter Monthly28 - set as 'H21 Monthly28' | RateSheetPay.RateSheetPayDescription |
| Total of ALL Guaranteed Hours across ALL Posts | [D591M].[HR] | Sum of ALL OPEN Posts (where no End Date loaded) | employeeratesheethoursperweek |
| Holiday Scheme from Main Post |  | Service Condition short name where Main Post indicator = Y and Post End Date is blank | VacationScheme.VacationSchemeDescription |
| N/A | - | Set as 'Walker' | EmployeeTransportMode.TransportModeDescription |
| TUPE In - How Joined | [D550M].[HOW\_JOINED] in ('TUPEI', 'TRANS') ***or*** [D550M].[EMP\_SERV\_TUPE\_FLAG]='Y' ***or*** [D200M].[CLASS] in ('NMSTUP', 'ANCTUP', 'CARERT', 'ACMTUP', 'TLTUPE', 'FLMTUP', 'SMTUPE', 'CMECHT', 'DCTUPE', 'DIRTUP', 'CMTUPE', 'OSTUPE') | [D550M].[HOW\_JOINED] in ('TUPEI', 'TRANS') ***or*** [D550M].[EMP\_SERV\_TUPE\_FLAG]='Y' ***or*** [D200M].[CLASS] in ('NMSTUP', 'ANCTUP', 'CARERT', 'ACMTUP', 'TLTUPE', 'FLMTUP', 'SMTUPE', 'CMECHT', 'DCTUPE', 'DIRTUP', 'CMTUPE', 'OSTUPE')  If any of these matched then set as 'TRUE', else 'FALSE' | Employee.EmployeeTUPE |
| TUPE Original Start Date (if TUPE) | [D550M].[ORIG\_START\_DATE] | If 'How Joined' = TRUE | Employee.EmployeeTUPEContinuousServiceDate |
| Full Time / Part Time | [D539M].[POSITION\_STATUS] | If Full Time, then set as '1' | Employee.EmployeeFullTime |
| N/A |  | Set as 'Paper' | Employee.EmployeeTimeSheetStatus |
| N/A |  | Set as 'Paper' | Employee.EmployeeGrossPayslipStatus |
| Main Post - Post Number | [D200M].[NUMBER\_R] | When Main Post Indicator = Y and Post End Date is blank | EmployeeCustom\_MP\_Post\_Number |
| Main Post - Post Effective Date | [D580M].[START\_DATE] |  | EmployeeCustom\_MP\_Post\_Effective\_Date |
| Main Post - Post Site ID | [D100PR8].[SHORT\_DESC] | This needs to match QL Scheme Code | EmployeeCustom\_MP\_Post\_Site\_ID |
| Main Post - Job Type for Post | [D300M].[SORT\_CODE] |  | EmployeeCustom\_MP\_Job\_Type\_for\_Post |
| Main Post - FTE Hours for Post | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_MP\_FTE\_Hours\_for\_Post |
| Main Post - Guaranteed Pay Element 1 | [D557M].[ID] |  | EmployeeCustom\_MP\_Guaranteed\_Pay\_Element\_1 |
| Main Post - Guaranteed Hours for Pay Element 1 | [D591M].[HR\_FTE\_HOURS] | From Post Hrs | EmployeeCustom\_MP\_Guaranteed\_Hours\_for\_Pay\_Element\_1 |
| Main Post - Guaranteed Pay Element 2 |  |  | EmployeeCustom\_MP\_Guaranteed\_Pay\_Element\_2 |
| Main Post - Guaranteed Hours for Pay Element 2 |  | From PE on Post | EmployeeCustom\_MP\_Guaranteed\_Hours\_for\_Pay\_Element\_2 |
| Secondary Post 1 - Post Number | [D200M].[NUMBER\_R] | Rank all Secondary Posts by Post No, where Main Post Flag <> Y and End Date blank Only populate if secondary post(s) exist | EmployeeCustom\_SP1\_Post\_Number |
| Secondary Post 1 - Post Effective Date | [D580M].[START\_DATE] |  | EmployeeCustom\_SP1\_Post\_Effective\_Date |
| Secondary Post 1 - Post Site ID | [D100PR8].[SHORT\_DESC] |  | EmployeeCustom\_SP1\_Post\_Site\_ID |
| Secondary Post 1 - Job Type for Post |  |  | EmployeeCustom\_SP1\_Job\_Type\_for\_Post |
| Secondary Post 1 - FTE Hours for Post | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP1\_FTE\_Hours\_for\_Post |
| Secondary Post 1 - Guaranteed Pay Element 1 |  |  | EmployeeCustom\_SP1\_Guaranteed\_Pay\_Element\_1 |
| Secondary Post 1 - Guaranteed Hours for Pay Element 1 | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP1\_Guaranteed\_Hours\_for\_Pay\_Element\_1 |
| Secondary Post 1 - Guaranteed Pay Element 2 |  |  | EmployeeCustom\_SP1\_Guaranteed\_Pay\_Element\_2 |
| Secondary Post 1 - Guaranteed Hours for Pay Element 2 |  |  | EmployeeCustom\_SP1\_Guaranteed\_Hours\_for\_Pay\_Element\_2 |
| Secondary Post 2 - Post Number | [D200M].[NUMBER\_R] | Rank all Secondary Posts by Post No, where Main Post Flag <> Y and End Date blank | EmployeeCustom\_SP2\_Post\_Number |
| Secondary Post 2 - Post Effective Date | [D580M].[START\_DATE] |  | EmployeeCustom\_SP2\_Post\_Effective\_Date |
| Secondary Post 2 - Post Site ID | [D100PR8].[SHORT\_DESC] |  | EmployeeCustom\_SP2\_Post\_Site\_ID |
| Secondary Post 2 - Job Type for Post |  |  | EmployeeCustom\_SP2\_Job\_Type\_for\_Post |
| Secondary Post 2 - FTE Hours for Post | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP2\_FTE\_Hours\_for\_Post |
| Secondary Post 2 - Guaranteed Pay Element 1 |  |  | EmployeeCustom\_SP2\_Guaranteed\_Pay\_Element\_1 |
| Secondary Post 2 - Guaranteed Hours for Pay Element 1 | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP2\_Guaranteed\_Hours\_for\_Pay\_Element\_1 |
| Secondary Post 2 - Guaranteed Pay Element 2 |  |  | EmployeeCustom\_SP2\_Guaranteed\_Pay\_Element\_2 |
| Secondary Post 2 - Guaranteed Hours for Pay Element 2 |  |  | EmployeeCustom\_SP2\_Guaranteed\_Hours\_for\_Pay\_Element\_2 |
| Secondary Post 3 - Post Number | [D200M].[NUMBER\_R] | Rank all Secondary Posts by Post No, where Main Post Flag <> Y and End Date blank | EmployeeCustom\_SP3\_Post\_Number |
| Secondary Post 3 - Post Effective Date | [D580M].[START\_DATE] |  | EmployeeCustom\_SP3\_Post\_Effective\_Date |
| Secondary Post 3 - Post Site ID | [D100PR8].[SHORT\_DESC] |  | EmployeeCustom\_SP3\_Post\_Site\_ID |
| Secondary Post 3 - Job Type for Post |  |  | EmployeeCustom\_SP3\_Job\_Type\_for\_Post |
| Secondary Post 3 - FTE Hours for Post | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP3\_FTE\_Hours\_for\_Post |
| Secondary Post 3 - Guaranteed Pay Element 1 |  |  | EmployeeCustom\_SP3\_Guaranteed\_Pay\_Element\_1 |
| Secondary Post 3 - Guaranteed Hours for Pay Element 1 | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP3\_Guaranteed\_Hours\_for\_Pay\_Element\_1 |
| Secondary Post 3 - Guaranteed Pay Element 2 |  |  | EmployeeCustom\_SP3\_Guaranteed\_Pay\_Element\_2 |
| Secondary Post 3 - Guaranteed Hours for Pay Element 2 |  |  | EmployeeCustom\_SP3\_Guaranteed\_Hours\_for\_Pay\_Element\_2 |
| Secondary Post 4 - Post Number | [D200M].[NUMBER\_R] | Rank all Secondary Posts by Post No, where Main Post Flag <> Y and End Date blank | EmployeeCustom\_SP4\_Post\_Number |
| Secondary Post 4 - Post Effective Date | [D580M].[START\_DATE] |  | EmployeeCustom\_SP4\_Post\_Effective\_Date |
| Secondary Post 4 - Post Site ID | [D100PR8].[SHORT\_DESC] |  | EmployeeCustom\_SP4\_Post\_Site\_ID |
| Secondary Post 4 - Job Type for Post |  |  | EmployeeCustom\_SP4\_Job\_Type\_for\_Post |
| Secondary Post 4 - FTE Hours for Post | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP4\_FTE\_Hours\_for\_Post |
| Secondary Post 4 - Guaranteed Pay Element 1 |  |  | EmployeeCustom\_SP4\_Guaranteed\_Pay\_Element\_1 |
| Secondary Post 4 - Guaranteed Hours for Pay Element 1 | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP4\_Guaranteed\_Hours\_for\_Pay\_Element\_1 |
| Secondary Post 4 - Guaranteed Pay Element 2 |  |  | EmployeeCustom\_SP4\_Guaranteed\_Pay\_Element\_2 |
| Secondary Post 4 - Guaranteed Hours for Pay Element 2 |  |  | EmployeeCustom\_SP4\_Guaranteed\_Hours\_for\_Pay\_Element\_2 |
| Secondary Post 5 - Post Number | [D200M].[NUMBER\_R] | Rank all Secondary Posts by Post No, where Main Post Flag <> Y and End Date blank | EmployeeCustom\_SP5\_Post\_Number |
| Secondary Post 5 - Post Effective Date | [D580M].[START\_DATE] |  | EmployeeCustom\_SP5\_Post\_Effective\_Date |
| Secondary Post 5 - Post Site ID | [D100PR8].[SHORT\_DESC] |  | EmployeeCustom\_SP5\_Post\_Site\_ID |
| Secondary Post 5 - Job Type for Post |  |  | EmployeeCustom\_SP5\_Job\_Type\_for\_Post |
| Secondary Post 5 - FTE Hours for Post | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP5\_FTE\_Hours\_for\_Post |
| Secondary Post 5 - Guaranteed Pay Element 1 |  |  | EmployeeCustom\_SP5\_Guaranteed\_Pay\_Element\_1 |
| Secondary Post 5 - Guaranteed Hours for Pay Element 1 | [D591M].[HR\_FTE\_HOURS] |  | EmployeeCustom\_SP5\_Guaranteed\_Hours\_for\_Pay\_Element\_1 |
| Secondary Post 5 - Guaranteed Pay Element 2 |  |  | EmployeeCustom\_SP5\_Guaranteed\_Pay\_Element\_2 |
| Secondary Post 5 - Guaranteed Hours for Pay Element 2 |  |  | EmployeeCustom\_SP5\_Guaranteed\_Hours\_for\_Pay\_Element\_2 |

### **File Output Requirements**

Extract should be available to save in Excel (xlsx) format with top row being the titles, and subsequent rows being the data for staff members.

No header or footer records are required.

### **Run Requirements**

As this will be for migration of staff data to People Planner as and when required, it is envisaged that this be available for run by Business Services members (Praveen, Andrew or Trish) with the relevant access rights (access to data in DW on RL tables) on request from the Project Team.

The Project Team will advise of the Scheme(s) that they want this to run against.

Output to then be provided to the requestor.

Authorised requestors will be:

* Blair Stokes-Hone
* Emily Hancock
* Paul Rose
* Zoe Tait

End of Document