**Calculating payments**

|  |  |  |
| --- | --- | --- |
| **Major Step** | **Key Point** | **Reason Why** |
| Download data from Rideshare Online | * Go to the rideshare online admin login page and log in: <https://rideshareonline.icarpool.com/admin/en/login.aspx> * Select the WSDOT Employees Network * Go to reports * Select the Trip Log Report (Aggregate And CSV Export) user report * Enter the start and end dates of the quarter * Make sure all modes are selected and the trip purpose is limited to Commute * Click the Click for Detailed Report (CSV file) link to download the report. It can take a few minutes. | We need the correct data to calculate the incentive payments. |
| Run the report | * Go to the [quarterly incentive payments](//hqolymfl01/groupi$/631020/QuarterlyIncentivePayments) folder on the group drive * Place the file downloaded previously into the input folder (The report will not run if there is more than one csv file in this folder) * Double click the run report button * Wait a few minutes – you will receive an email report. | A monk asked Yun Men, "What are the teachings of a whole lifetime?"  Yun Men said, "An appropriate statement." |
| Review the report | * The email report will contain links to the report payroll needs to make payments and a list of email addresses in the Rideshare online system that cannot be matched to internal records * Contact users with email address that could not be matched and instruct them to change their email address. * Once email addresses have been corrected repeat the previous two major steps, to get the final report that will be sent to payroll. | If we wish to match people in the ride share system to our internal records and payroll systems we must have them use there WSDOT email address.  We need to rerun the process so that we can get the updated report with their updated email address. |
| Archive files | * Once you have sent the final file to payroll. Double click the archive files shortcut in the [quarterly incentive payments](//hqolymfl01/groupi$/631020/QuarterlyIncentivePayments) folder on the group drive. This will place the input file and output file into the archive folder and date them. | We should archive all of the information to meet record retention schedules. |

**Setting up and maintain the Commute Quarterly Incentive Payments System**

This section is for staff that are responsible for maintaining the Commute Quarterly Incentive Payments System from a technical perspective.

|  |  |  |
| --- | --- | --- |
| **Major Step** | **Key Point** | **Reason Why** |
| Set up your computer and software to run the reports | You will need the following permissions and software to run this system:   * Permissions to access the Identity Management database * A connection in the ODBC Data Source Administrator to the Identity Management database named: IdentityManagement * The R programing software   + A copy of the installer for the version this was built with is in the [quarterly incentive payments](//hqolymfl01/groupi$/631020/QuarterlyIncentivePayments) folder on the group drive under the folder: “Code” | You need correct permissions to access data and the software to run the code. |
| Set up the scheduled job to run on your computer | * There is a file in this folder: G:\QuarterlyIncentivePayments\Code\Switch that is used as a scheduled job. * This file must be placed on your C drive to be used for a scheduled job, so please save it somewhere convenient on your C drive * Use the Windows Task Scheduler to set up a scheduled job that calls this script. Set it to run every 5 minutes. | Unfortunately PTD architecture/systems at the time this was developed did not allow for any method to directly run code on a central server. So you get this fun switch hack. |
| Change variables in the R script | * The R code lives in a file here: G:\QuarterlyIncentivePayments\Code * There are a number of variables you will want to change, you should add your email address to the list of email addresses that receive reports and or errors. * Change the technical maintenance person variable to be your name as you want it to appear in error email messages. | This way you get emails if there are errors. |