

Socrata Open Payroll – Dataset Schema

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Introduction

Socrata's Open Payroll allows you to visualize the details of your employees and payroll in an interactive way. The interface presented by Open Payroll is dynamically generated by your data. This document describes the dataset that is required for Open Payroll.

For Open Payroll to work, your dataset must be organized into a flat-file. You can think of this as having all your data on a single tab in Microsoft Excel. The dataset described below has three categories of columns/fields:

- **Required Fields:** These fields are required by Open Payroll to function.
- **Recommended Fields:** When these fields are provided, the usefulness of Open Payroll will become substantially better for constituents.
- **Optional Fields:** These fields are optional as they are useful for users (e.g. analysts) accessing the raw data directly as well and may be used in future enhancements of the Open Payroll product.

Dataset Fields

Recommended Column Name	Type	Value	Notes
year	Required	Number	Used to distinguish entries across multiple years.
transaction_date	Required	Date/Time	The date of the paycheck. For annual data, add years in the format 1/1/[year].
Employee Information			
employee_id	Required	Text	This unique identifier is used to associate multiple years of data to the same person, enabling a trend visualization.
name_last	Recommended	Text	Used in searching and show data on a specific individual.
name_first	Recommended	Text	Used in searching and show data on a specific individual.
name_suffix	Recommended	Text	Used in searching and show data on a specific individual.
Position Details			
department / division / etc.	Required	Text	Used to aggregate payroll for a given department/division name.
position_title	Required	Text	Used to present a human-readable title for the position.
position_type	Required	Text	Used to aggregate payroll by employment type (ex. Full Time, Part Time, Contract), and to properly represent aggregate statistics (e.g. averages and medians).
service_start_date	Recommended	Date	Calculate length of service since initial employment.
service_end_date	Recommended	Date	Calculate length of service since initial employment.
Actual/YTD Pay Details			
pay_total_actual	Required	Number	The actual amount that the position has received in total pay in the paycheck.
pay_base_actual	Recommended	Number	The actual amount that the position has received in base/salary pay in the paycheck.
pay_benefits_actual	Recommended	Number	The actual amount that the position has received in benefits pay in the paycheck.
pay_overtime_actual	Recommended	Number	The actual amount that the position has received in overtime pay in the paycheck.

pay_other_actual	Recommended	Number	The actual amount of other pay (e.g. supplemental pay, bonuses, etc) in the paycheck.
Target Pay Details			
projected_total	Optional	Number	The projected total annual earnings for the employee.
Supplementary Information			
<i>memorandum_of_understanding</i>	<i>Optional</i>	<i>Text</i>	<i>Show employees connected to a specific MOU.</i>
<i>contract</i>	<i>Optional</i>	<i>Text</i>	<i>Show employees connected to a specific union contract.</i>
<i>bargaining_group</i>	<i>Optional</i>	<i>Text</i>	<i>Show employees connected to a specific bargaining group.</i>
<i>Any other field</i>	<i>Optional</i>	<i>Text</i>	<i>Used for data analysts looking at government specific data.</i>

