State of Wisconsin

Department of Administration

Enterprise Personnel Report

Purpose

The purpose of this report is to facilitate cross-agency data gathering. This report will commonly be used for salary comparisons for pay upon appointment decisions and to gather active employee contact information for recruitment purposes

Revised 1/24/22

Contents

Release of Employee Personnel Records

IMPORTANT: Refer to [s. 19.36(10) of Wisconsin Statutes] when determining if the data within this report is authorized to be released outside of an agencies HR office.

19.36(10) Employee Personnel Records. Unless access is specifically authorized or required by statue, an authority shall not provide access under s. 19.35(1) to records containing the following information, except to an employee or the employee's representative to the extend required under s. 103.13 or to a recognized or certified collective bargaining representative to the extent required to fulfill a duty to bargain under ch. 111 or pursuant to a collective bargaining agreement under ch. 111:

> **(a) Information maintained, prepared, or provided by an employer concerning the home address, home electronic mail address, home telephone number, or social security number of an employee, unless the employee authorizes the authority to provide access to such information.**

Running the Query

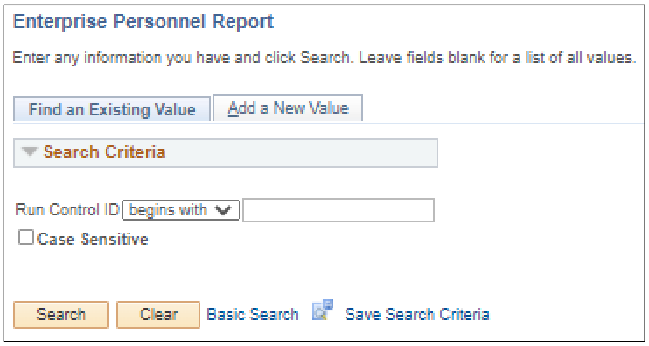
Begin by navigating to the **Enterprise Personnel Report** page.

Workforce Administrator Home Page > Human Resources Dashboard > Reports & Queries Tile > Enterprise Personnel Report

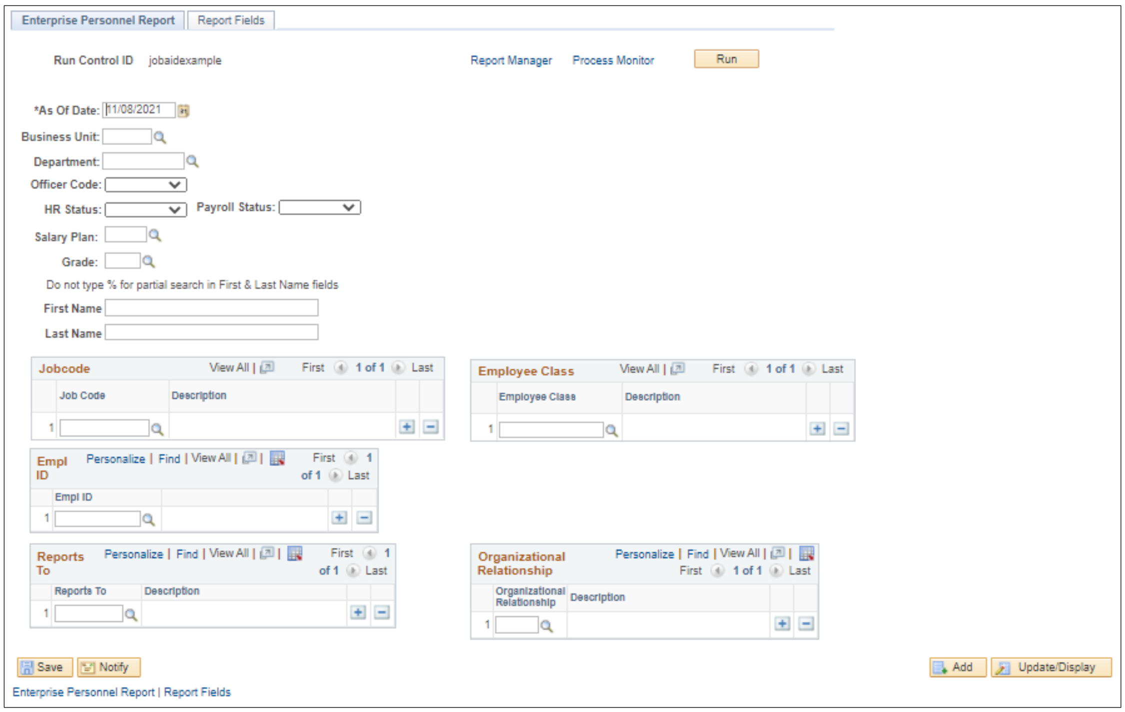
OR

NavBar > State of Wisconsin (STAR) > Human Resources > Reports > Enterprise Personnel Report

1. Enter a **Run Control ID**
    - On the Find an Existing Value tab, enter an existing Run Control ID. If you do not have an existing Run Control ID, enter a new one on the Add a New Value tab.
    - A Run Control ID is used to save search parameters. Run Control IDs are linked and stored by Username (you only see your own). You can have any number of Run Control IDs and you can develop any naming convention you choose provided no spaces or special characters are used. Run Control IDs cannot be deleted but saved parameters can be changed.
    - Click **Search** (if using existing) or **Add** (if using new) as appropriate.

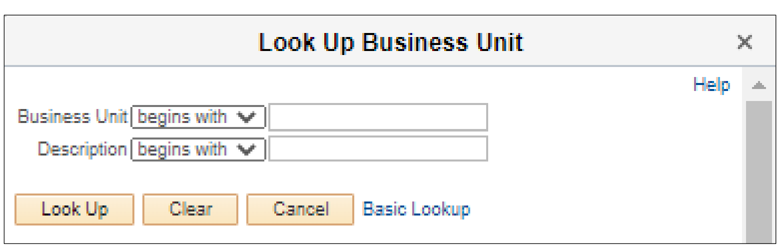


2. Enter your search criteria (see below for field-by-field descriptions)

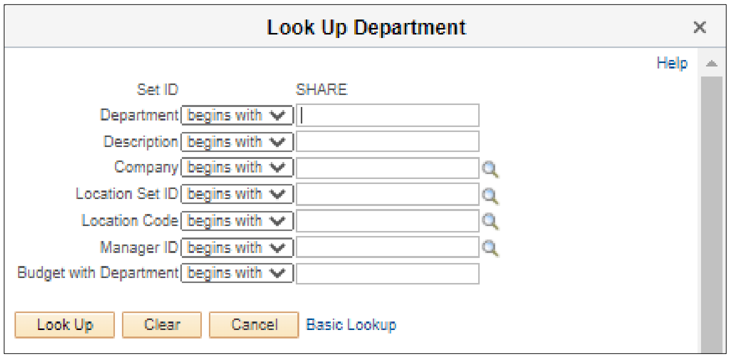


a. **As Of Date**: a criterion that evaluates a snapshot of data on a particular date in time. In most cases you will want to see all employees meeting your search criteria as of the date you are running the report. You can run the report to reflect employees that meet your criteria as of another date by entering the date in this field.

b. **Business Unit**: To see employees within a particular Business Unit enter the Business Unit number or search for the number by clicking on the magnifying glass, entering search criteria, and selecting from the results. To see employees from all business units, leave this field blank.

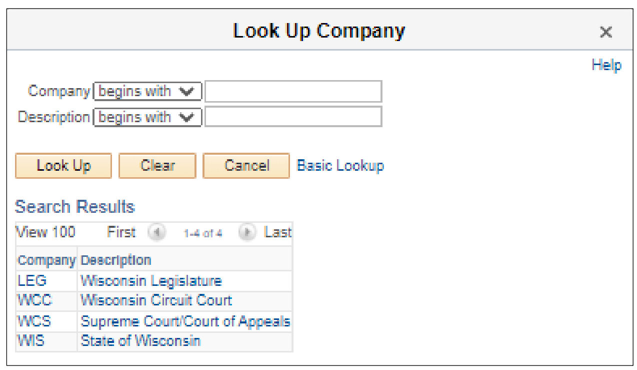


c. **Department**: To see employees within a particular Department ID enter the Department ID or search for the ID by clicking on the magnifying glass, entering search criteria, and selecting from the results. Leave this field blank to return employees in all Department IDs.

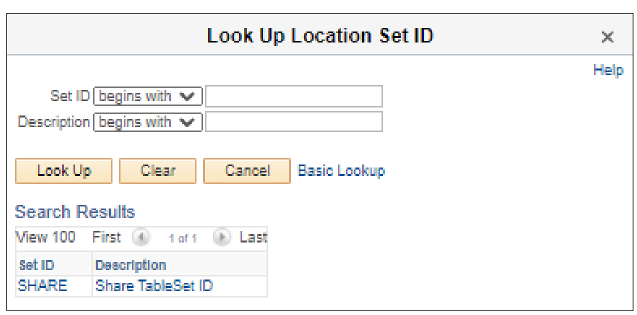


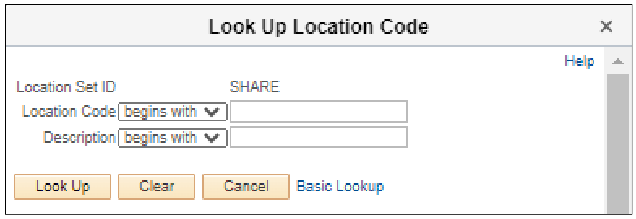
i. Within the Department Lookup:

1. **Company** – Agencies outside of the Legislature or Courts cannot view employee data for Legislature or Courts employees therefore this field should always be WIS for non-Legislature and Courts users. LEG or COURTS will not produce any results.



2. **Location Code** – You must enter SHARE in the Location Set ID prior to using the magnifying glass next to Location Code to search for a particular location.





3. **Manager ID** – Manager ID is not used in PeopleSoft, so this lookup should not be used.

4. **Budget with Department** – this lookup should not be used.

d. **Officer Code**: To see employees with Career Executive status or only those employees without Career Executive status select from the Officer Code menu. To see both Career Executives and Non-Career Executives leave the Officer Code field blank.

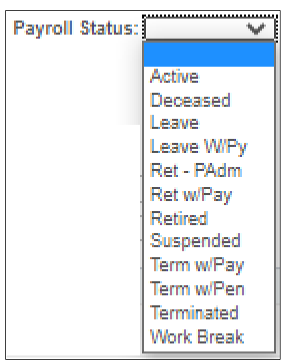
e. **HR Status**: To see employees who have an HR Status of either Active or Inactive select from the HR Status menu. To see employees with any HR Status, leave the HR Status field blank.

i. HR Status:

1. Active

2. Inactive

f. **Payroll Status**: To see employees who have a particular Payroll Status select from the Payroll Status menu. To see employees with any Payroll Status, leave the Payroll Status field blank.



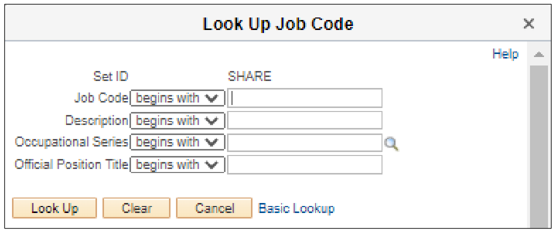
g. **Salary Plan**: To see employees in a particular Salary Plan (Pay Schedule) enter it in the Salary Plan field or search for it by clicking on the magnifying glass, entering search criteria, and selecting from the results.

h. **Grade**: To see employees in a particular Grade (Pay Range) enter it in the Grade field or search for it by clicking on the magnifying glass, entering search criteria, and selecting from the results.

i. **First Name and Last Name**: To search for a particular employee by name or partial name enter it into the First and/or Last Name field. There is no need to use a wild card (%) to search for partial names.

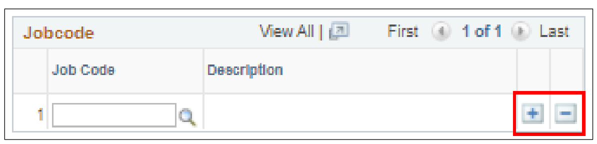
j. **Job Code**: To see employees in a particular Job Code (Class Code) enter it in the Job Code field or search for it by clicking on the magnifying glass, entering search criteria, and selecting from the results.

i. Within the Job Code Lookup:

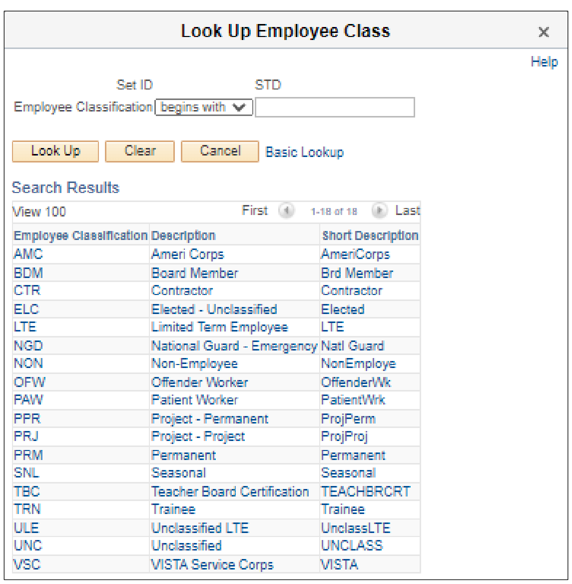


1. **Description:** Job Code Description
2. **Occupational Series**: To see employees in a particular Occupational Series, search for it by searching for it, and selecting from the results
3. **Official Position Title:** this look up should not be used.

ii. You can enter multiple Job Codes by adding Job Code rows. To add rows, click on the "+". To remove rows, click on the "-".



k. **Employee Class**: To see employees in a particular Employee Class enter it in the Employee Class field or search for it by clicking on the magnifying glass, entering search criteria, and selecting from the results. Leave blank to search for all employee classes.



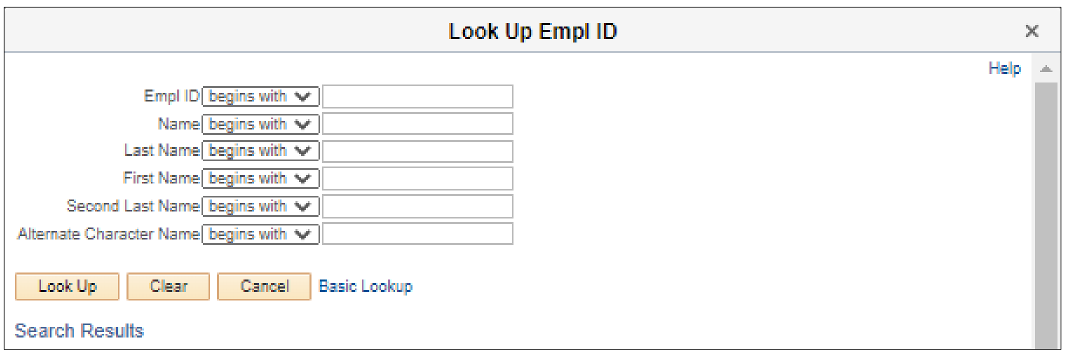
Employee Classification	Description	Short Description
AMC	Ameri Corps	AmeriCorps
BDM	Board Member	Brd Member
CTR	Contractor	Contractor
ELC	Elected - Unclassified	Elected
LTE	Limited Term Employee	LTE
NGD	National Guard - Emergency	Natl Guard
NON	Non-Employee	NonEmploye
OFW	Offender Worker	OffenderWk
PAW	Patient Worker	PatientWrk
PPR	Project - Permanent	ProjPerm
PRJ	Project - Project	ProjProj
PRM	Permanent	Permanent
SNL	Seasonal	Seasonal
TBC	Teacher Board Certification	TEACHBRCRT
TRN	Trainee	Trainee
ULE	Unclassified LTE	UnclassLTE
UNC	Unclassified	UNCLASS
VSC	VISTA Service Corps	VISTA

i. Patient Worker and Offender Worker Employee Classifications are hidden from user views, and results will not populate if these employee classes are the only ones selected.

ii. Permanent employees include employee classes of PPR (Project-Permanent), PRM (Permanent), SNL (Seasonal), and Trainee (TRN). All four Empl Classes must be included to view all permanent employees.

iii. You can enter multiple Employee Classes by adding Employee Class rows. To add rows, click on the “+”. To remove rows, click on the “-“.

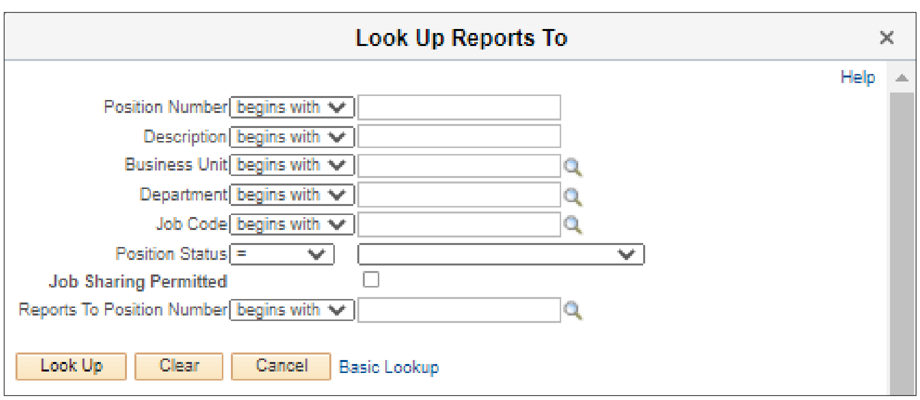
l. **Empl ID**: To see specific employee’s data, enter the employee’s Empl ID in the Empl ID field or search for it by clicking on the magnifying glass, entering search criteria, and selecting from the results.



i. Second Last name and Alternate Character Name should not be used to look up names.

ii. You can enter multiple Empl IDs by adding Empl ID rows. To add rows, click on the “+”. To remove rows, click on the “-“.

m. **Reports To**: To search all employees who report to a particular supervisor, enter the Position Number of the supervisor.



i. Description is the Job Code Description

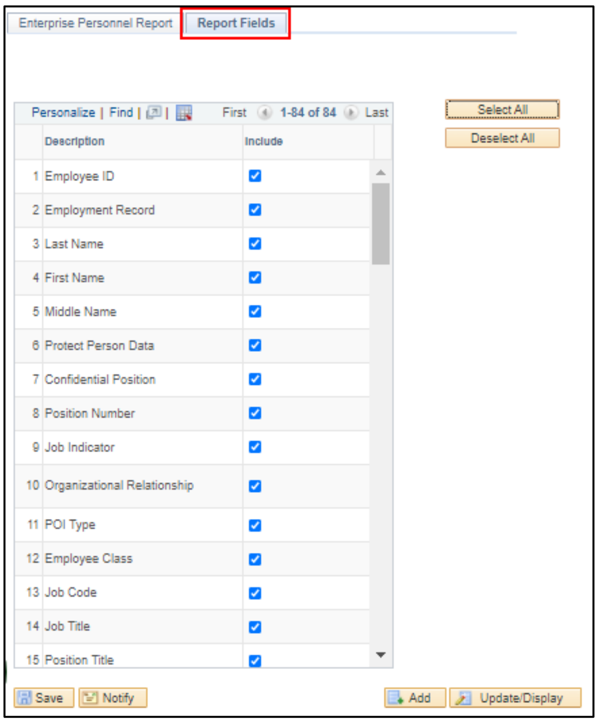
1. Job Sharing Permitted should not be used as lookup criteria

2. Reports To Position Number is the supervisor of the supervisor you're looking for

ii. You can enter multiple Reports To position numbers by adding rows. To add rows, click on the "+". To remove rows, click on the "-".

n. **Organizational Relationship**: To search for employees in a particular Organizational Relationship (Contingent Workers, Employees, or Person of Interest) select the Organizational Relationship type.

3. To personalize the fields that are included in the results of your report click on the **Report Fields** tab and select the fields you want. To return to the report prompts and/or to run the report click on the **Enterprise Personnel Report** tab.



REMEMBER: The selected report fields save to the run control ID every time it's used. Verify the desired fields each time the report is run.

Available fields on the Enterprise Personnel Report:

Employee ID

Employment Record

Last Name

First Name

Middle Name

Protect Person Data – *if an employee has this flag their data can NOT be released*

Confidential Position – *if a position has this flag the incumbent's data can NOT be released*

Position Number

Job Indicator

Organizational Relationship

POI Type

Employee Class

Job Code

Job Title

Position Title

Business Title

Supervisor Level Description

Job Function

Job Function Name

Job Family

Job Family Name

EEO4-Code

EEO4-Job Category

Base Hourly Rate

Hourly Rate

Salary Plan

Grade

Officer Code

Gender

Primary Ethnic Group

FTE

FLSA Status

Eligibility Group

Time Report Type

Workgroup

Business Unit

Business Unit Description

Department ID

Department Name

Employee Category

Pay Group

Location

Location Description

Location Address 1

Location Address 2

Location Address 3

Location Floor

Location City

Location State

Location Zip Code

Business Email

Business Phone

Work Cell Phone

*Home Address Line 1

*Home Address Line 2

*Home Address Line 3

*Home City

*Home State

*Home Zip Code

*Mailing Address Line 1

*Mailing Address Line 2

*Mailing Address Line 3

*Mailing City

*Mailing State

*Mailing Zip Code

*Home Email

*Other Email

*Home Phone

*Mobile Phone

*Other Phone

Company Seniority Date

Length of Service

Original Start Date

Position Entry Date

Job Code Entry Date

Department Entry Date

Classified Indicator – *this field was added at a later date so it is NOT automatically selected like all other fields. If you want to see it you must select it manually.*

Class Ind Description

Payroll Status

HR Status

Termination Date

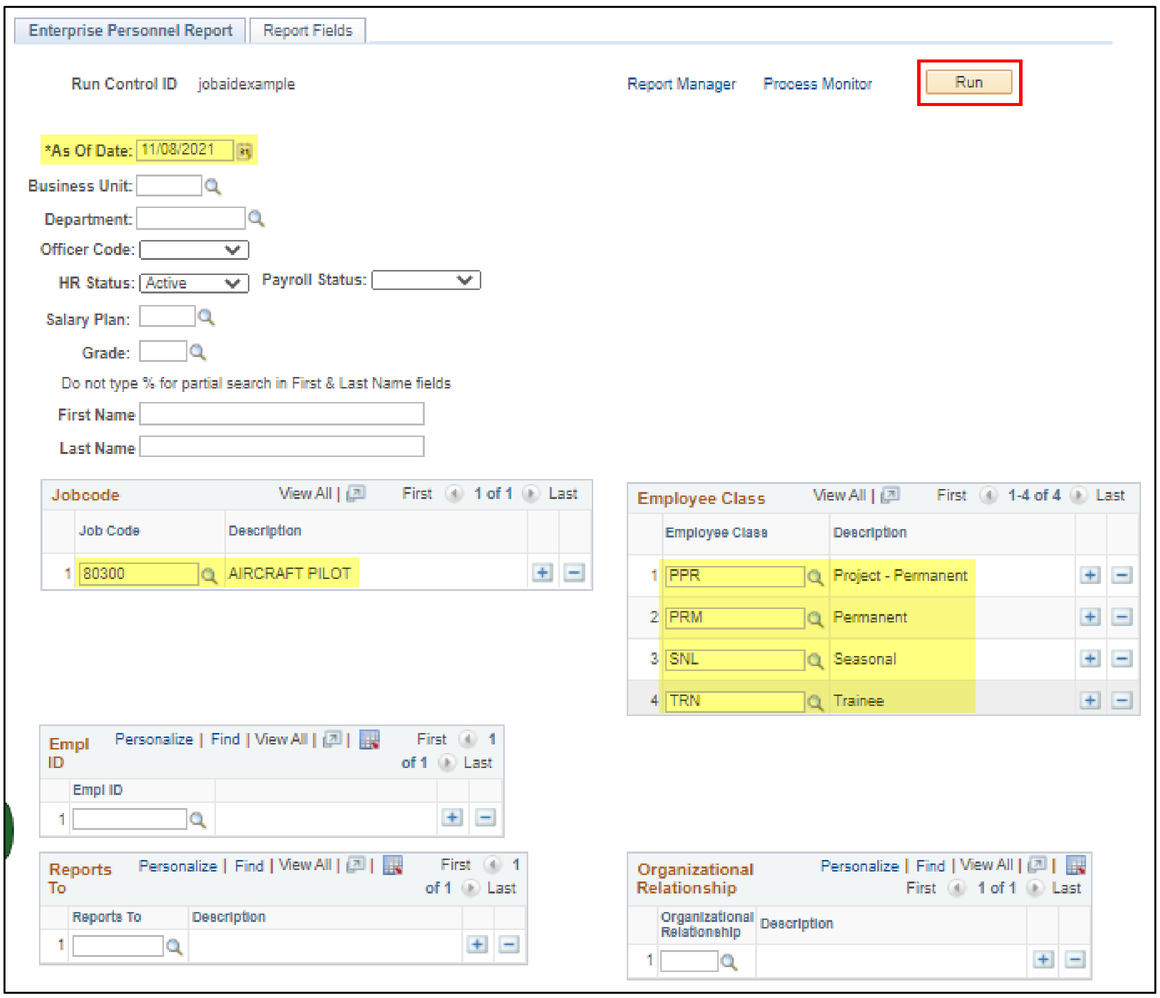
Reports To – Position #

Reports To – Empl ID

Reports To – Name

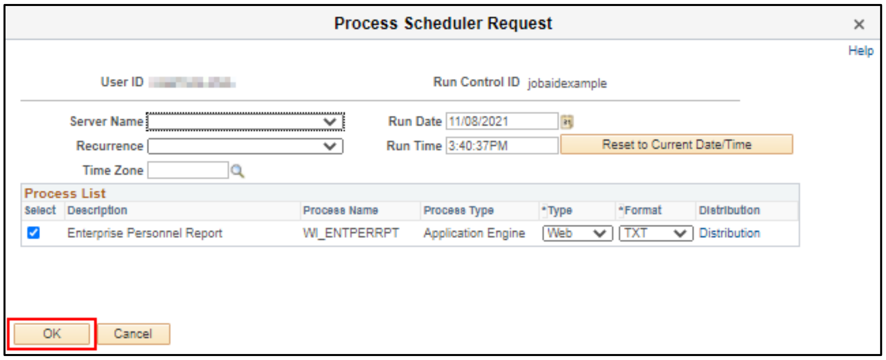
*** = This information is NOT authorized to be released to anyone outside of the employee's HR office. This includes NOT being authorized to release this data to the employee's Supervisor. Refer to [s. 19.36(10) of Wisconsin Statutes](#)**

4. When you have selected all your desired criteria, click **Run**.



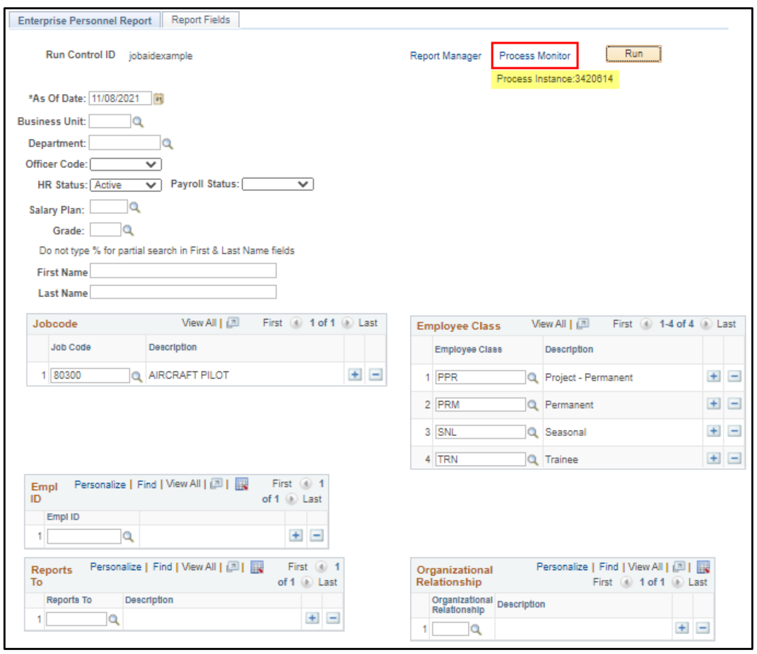
BE AWARE: The parameters and selected fields will save to the Run ID automatically each time the report is run. Check the parameters and fields each time the report is run to ensure they are accurate.

5. Do not change anything on the Process Scheduler Request. Click **OK** to run the report.

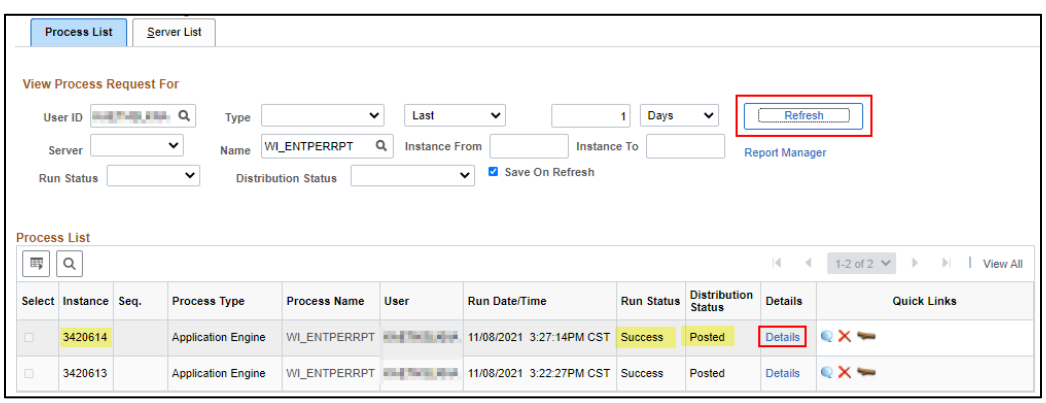


NOTE: No matter what Format you chose the report results will export in Excel.

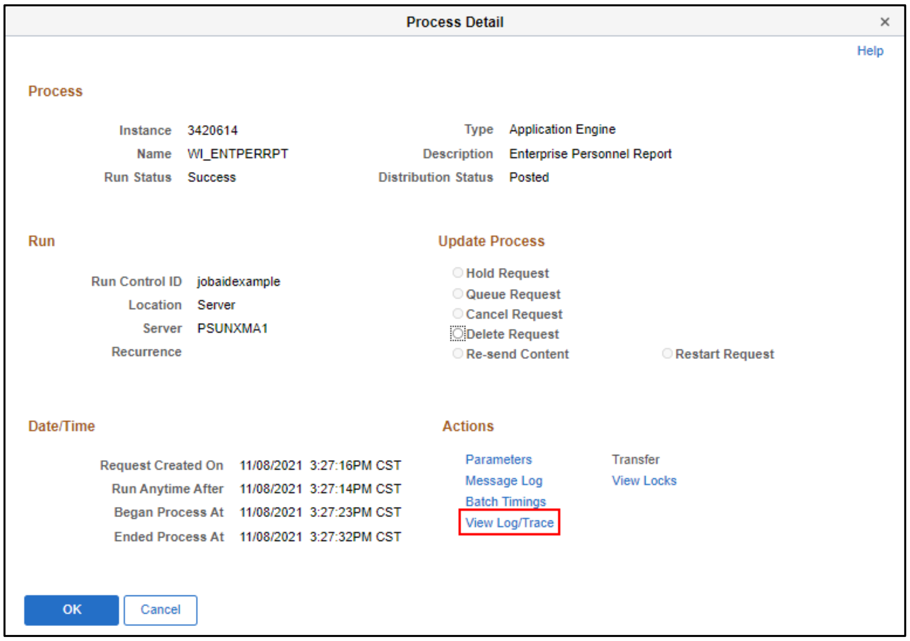
6. Take note of the Process Instance Number (highlighted yellow in the screenshot below)
7. To watch the process of the report, click **Process Monitor**



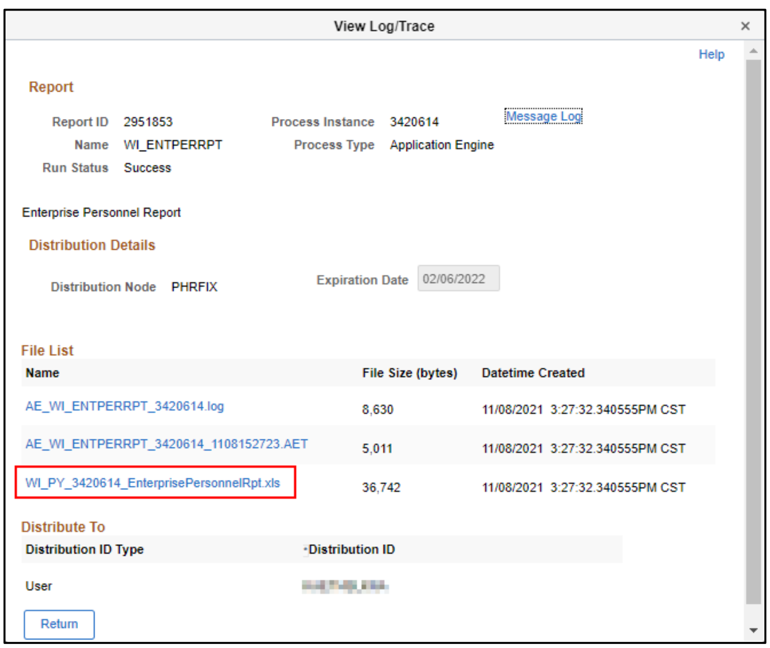
8. In the Process List section, find the Process Instance Number noted from the previous page. Continue to select **Refresh** until the Run Status is "Success" and the Distribution Status is "Posted".



9. On the Process Detail Window, under the Actions Section, click on **View Log/Trace** to open the results of the report.



10. To open the report file, click the **.xls link** from the File List.



11. Depending on the type of browser being used you may have options to open, save, or save as.

12. You may receive the following warning when opening the file. The file is safe to open. Click **Yes.**