

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

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Release of Employee Personnel Records

IMPORTANT: Refer to <u>s. 19.36(10) of Wisconsin Statutes</u> 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.

Enterprise Personnel Report
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value Add a New Value
Search Criteria
Run Control ID begins with 🗸
Case Sensitive
Search Clear Basic Search 🖾 Save Search Criteria

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

Enterprise Personnel Report Report Fields	
Run Control ID jobaidexample	Report Manager Process Monitor Run
*As Of Date: 11/08/2021	
Business Unit:	
Department:	
Officer Code:	
HR Status: Payroll Status: V	
Salary Plan:	
Grade:	
Do not type % for partial search in First & Last Name fields	
First Name	
Last Name	
Jobcode View All 🖉 First 🕢 1 of 1 🕟 Last	Employee Class View All 😰 First 🕢 1 of 1 🕢 Last
Job Code Description	Employee Clase Description
1Q	1Q
Empl Personalize Find View All [2] R First ④ 1 ID of 1 ④ Last	
Empl ID	
Reports Personalize Find View All [20]] First (a) 1 To of 1 (a) Last	Organizational Relationship Personalize Find View All I III First I 1 of 1 Last
Reports To Description	Organizational Relationship
Save 🗊 Notify	Add Jupdate/Display
terprise Personnel Report Report Fields	

- 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.

Look Up Business Unit	>	×
	Help	*
Business Unit begins with Description begins with		
Look Up Clear Cancel Basic Lookup		

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.

Look Up Department	×
	Help 🔺
Set ID SHARE	
Department begins with 🗸	
Description begins with 🗸	
Company begins with 🗸	
Location Set ID begins with 🗸	
Location Code begins with 🗸	
Manager ID begins with 🗸	
Budget with Department begins with 🗸	
Look Up Clear Cancel Basic Lookup	

- i. Within the Department Lookup:
 - 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.

	Look Up Company	×
		Help
Comp	any begins with 🗸	
Descrip	tion begins with 🗸	
Look	Up Clear Cancel Basic Lookup	
Search	h Results	
View 10	10 First 🕢 1-4 of 4 🕑 Last	
Compan	y Description	
LEG	Wisconsin Legislature	
WCC	Wisconsin Circuit Court	
WCS	Supreme Court/Court of Appeals	
WIS	State of Wisconsin	

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.

Look Up Location Set ID		×
		Help
Set I	D begins with 🗸	
Descriptio	on begins with 🗙	
Look U Search I		
View 100	First 🕢 1 of 1 🕑 Last	
Set ID	Description	
SHARE	Share TableSet ID	

Look Up Location Code	×
Location Set ID SHARE Location Code begins with V Description begins with V Look Up Clear Cancel Basic Lookup	Help 🔺

- 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.

Payroll Status:	~
	Active
	Deceased
	Leave
	Leave W/Py
	Ret - PAdm
	Ret w/Pay
	Retired
	Suspended
	Term w/Pay
	Term w/Pen
	Terminated
	Work Break

- 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:

Look Up Job Code	×
Set ID SHARE Job Code begins with V Description begins with V Occupational Series begins with V Official Position Title begins with V Look Up Clear Cancel Basic Lookup	Help 🔺

- 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 "-".

Job	code	View All 🖉 🛛 First 🕚 1 of 1	Last
	Job Code	Description	
1	٩		+ -

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.

	Look Up E	mployee Class	×
			Hel
Set	t ID S	TD	
Employee Classificat	ion begins with 🗸		
Look Up C	lear Cancel	Paris Laster	
LOOK OP	Gander	Basic Lookup	
Search Results			
	-	t 🕢 1-18 of 18 🕟 Last	
View 100			
Employee Classificati		Short Description	
AMC	Ameri Corps	AmeriCorps	
BDM	Board Member	Brd Member	
CTR	Contractor	Contractor	
ELC	Elected - Unclassifi		
LTE	Limited Term Emplo		
NGD		nergency Natl Guard	
NON	Non-Employee	NonEmploye	
OFW	Offender Worker	OffenderWk	
PAW	Patient Worker	PatientWrk	
PPR	Project - Permanen		
PRJ	Project - Project	ProjProj	
PRM	Permanent	Permanent	
SNL	Seasonal	Seasonal	
TBC	Teacher Board Cert		
TRN	Trainee	Trainee	
ULE	Unclassified LTE	UnclassLTE	
UNC	Unclassified	UNCLASS	
VSC	VISTA Service Corp	os 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.
- 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 "-".
- I. **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.

Look Up Empl ID	>	<
	Help	*
Empl ID begins with 🗸		
Name begins with 🗸		
Last Name begins with 🗸		
First Name begins with 🗸		
Second Last Name begins with 🗸		
Alternate Character Name begins with 🗸		
Look Up Clear Cancel Basic Lookup		
Search 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.

Look Up Rep	×	
		Help 🔺
Position Number begins with 🗸		
Description begins with 🗸		
Business Unit begins with 🗸	Q	
Department begins with 🗸	Q	
Job Code begins with 🗸	Q	
Position Status =	~	
Job Sharing Permitted		
Reports To Position Number begins with 🗸	Q	
Look Up Clear Cancel Basic Lookup		

- 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.

Pe	ersonalize Find 💷 🔜	First ④ 1-84 of 84	4 🛞 Last Select All
	Description	Include	Deselect All
1	Employee ID		A
2	Employment Record		
3	Last Name		
4	First Name		
5	Middle Name		
6	Protect Person Data		
7	Confidential Position		
8	Position Number		
9	Job Indicator		
10	Organizational Relationship		
11	POI Type		
12	Employee Class		
13	Job Code		
14	Job Title		
15	Position Title		•

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	Confidential Position — <i>if a position has this flag the incumbent's data can NOT be released</i>			
Employment Record	Position Number			
Last Name First Name	Job Indicator			
Middle Name	Organizational Relationship			
Protect Person Data — if an employee has this flag	РОІ Туре			
their data can NOT be released	Employee Class			

Job Code	Location Address 1
Job Title	Location Address 2
Position Title	Location Address 3
Business Title	Location Floor
Supervisor Level Description	Location City
Job Function	Location State
Job Function Name	Location Zip Code
Job Family	Business Email
Job Family Name	Business Phone
EEO4-Code	Work Cell Phone
EEO4-Job Category	*Home Address Line 1
Base Hourly Rate	*Home Address Line 2
Hourly Rate	*Home Address Line 3
Salary Plan	*Home City
Grade	*Home State
Officer Code	*Home Zip Code
Gender	*Mailing Address Line 1
Primary Ethnic Group	*Mailing Address Line 2
FTE	*Mailing Address Line 3
FLSA Status	*Mailing City
Eligibility Group	*Mailing State
Time Report Type	*Mailing Zip Code
Workgroup	*Home Email
Business Unit	*Other Email
Business Unit Description	*Home Phone
Department ID	*Mobile Phone
Department Name	*Other Phone
Employee Category	Company Seniority Date
Pay Group	Length of Service
Location	Original Start Date
Location Description	Position Entry Date

Job Code Entry Date	Payroll Status
Department Entry Date	HR Status
Classified Indicator – this field was added at a later	Termination Date
date so it is NOT automatically selected like all other fields. If you want to see it you must select it manually.	Reports To – Position #
Class Ind Description	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 <u>s. 19.36(10) of Wisconsin Statutes</u>

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

Enterprise Personnel Report Report Fields	
Run Control ID jobaidexample	Report Manager Process Monitor Run
*As Of Date: 11/08/2021	
Business Unit:	
Department:	
Officer Code:	
HR Status: Active V Payroll Status:	
Salary Plan:	
Grade:	
Do not type % for partial search in First & Last Name fields	
First Name	
Last Name	
Jobcode View All 💷 First 🕢 1 of 1 🕟 Last	Employee Class View All 🖉 First 🕢 1-4 of 4 🕟 Last
Job Code Description	Employee Class Description
1 80300 Q AIRCRAFT PILOT 🛨 🖃	1 PPR Q Project - Permanent + -
	2 PRM Q Permanent 🛨 🖃
	3 SNL Q Seasonal + -
	4 TRN Q Trainee + -
Empl Personalize Find View All 2 R First (1) ID of 1 (2) Last Empl ID (1) 1 (1) (2) (1) (1) (1) (1) (1) (1) (1) (1) (1) (1	
Reports Personalize Find View All [2] []] First () 1 To of 1 () Last	Organizational Relationship Personalize Find View All [2]]] First () 1 of 1 () Last
Reports To Description	Organizational Relationship
	1

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.

	Process Scheduler Request							
	User ID		Run Control ID	obaidexar	nple		Help	
	Server Name	V Ru	Date 11/08/2021	8				
	Recurrence		Time 3:40:37PM		Reset to Cu	irrent Date/Time]	
	Time Zone							
	ess List							
Select	Description	Process Name	Ргосева Туре	•туре	*Format	Distribution		
~	Enterprise Personnel Report	WI_ENTPERRPT	Application Engine	Web	V TXT	 Distribution 		
		-						
Oł	Cancel							

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**

Enterprise Personnel Report Report Fields		
Run Control ID jobaidexample	Report Manager Process Monitor Run Process Instance:3420614	
*As Of Date: 11/08/2021		
Business Unit:		
Department:		
Officer Code:		
HR Status: Active V Payroll Status:		
Salary Plan:		
Grade:		
Do not type % for partial search in First & Last Name fields		
First Name		
Last Name		
Jobcode View All 🖉 First 🕢 1 of 1 💿 Last	Employee Class View All 🖉 First 🕢 1-4 of	4 🛞 Last
Job Code Description	Employee Class Description	
1 80300 Q AIRCRAFT PILOT	1 PPR Q Project - Permanent	+ -
	2 PRM Q Permanent	+ -
	3 SNL Q Seasonal	• =
	3 SNL Q. Seasonal 4 TRN Q. Trainee	
Empl Personalize Find View All D R First () 1 ID of 1 () Last Empl ID 1 0 0 () () () () () () () () () () () () ()		÷ -
ID of 1 () Last		+ -
Implifie of 1 (): Last Implifie Implifie Implifie Impl	4 TRN Q Trainee Organizational Personalize Find View All	+ -

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".

	Process List	Server List								
Viev	v Process Rec	quest For								
	User ID	Q	Туре	~	Last	~	1 Days	▼	Refre	<u>sh</u>
	Server	~	Name WI	_ENTPERRPT (A Instance Fi	rom Instanc	е То	Re	port Manag	er
F	tun Status	~	Distribu	tion Status	,	 Save On Refresh 				
Proc	ess List									
=	Q									1-2 of 2 💙 🕨 🕨 View All
Sele	ct Instance S	eq. Process	зТуре	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Quick Links
	3420614	Applicat	ion Engine	WI_ENTPERRPT	out to the second	11/08/2021 3:27:14PM CST	Success	Posted	Details	Q 🗙 🐜
	3420613	Applicat	ion Engine	WI_ENTPERRPT	047503.004	11/08/2021 3:22:27PM CST	Success	Posted	Details	Q X 🖛

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

			I	Process Detai	I		×
							Help
Process							
	Instance	3420614		Туре	Application E	ingine	
	Name	WI_ENTPERRPT		Description	Enterprise Pe	ersonnel Report	
	Run Status	Success	Distr	ibution Status	Posted		
Run	Run Control ID Location Server Recurrence	Server PSUNXMA1		○ Cance ○ Delete		े Restart Request	
Date/Time	1			Actions			
ок	Run Anytim Began Proc	ated On 11/08/2021 ne After 11/08/2021 cess At 11/08/2021 cess At 11/08/2021	3:27:14PM CST 3:27:23PM CST	Batch	neters Ige Log Timings .og/Trace	Transfer View Locks	

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

		View	/ Log/Trace			×
Report Report ID Name Run Status	WI_ENTPERRPT	Process Instan Process Tyj	ce 3420614 pe Application Er	Message Log	Help	•
		Expirati	on Date 02/06/2	022		
File List Name			File Size (bytes)	Datetime Created		
AE_WI_ENTPE	RRPT_3420614.log		8,630	11/08/2021 3:27:32.340	555PM CST	
AE_WI_ENTPE	RRPT_3420614_110815272	3.AET	5,011	11/08/2021 3:27:32.340	555PM CST	
WI_PY_342061	4_EnterprisePersonnelRpt.x	Is	36,742	11/08/2021 3:27:32.340	555PM CST	1
Distribute To						
Distribution ID	Туре	 Distribut 	on ID			
User		100.000	CRIA.			
Return						

- 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.

Microso	oft B	Excel
		The file format and extension of 'WI_PY_3420614_EnterprisePersonnelRpt.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?
		Yes No Help