EMPLOYEE ACTION DETAIL
REPORT DESCRIPTION BP179 | WEB INTELLIGENCE

The purpose of this Report Description is to explain how to display the Employee Action Detail report in the Integrated HR-Payroll System.

REPORT DESCRIPTION:

This report shows employee action detail & action count for a specified Effective Date range or Processed Date range and includes Integrated HR-Payroll actions and PMIS converted actions. Provides jump to *B0022: Comments* report.

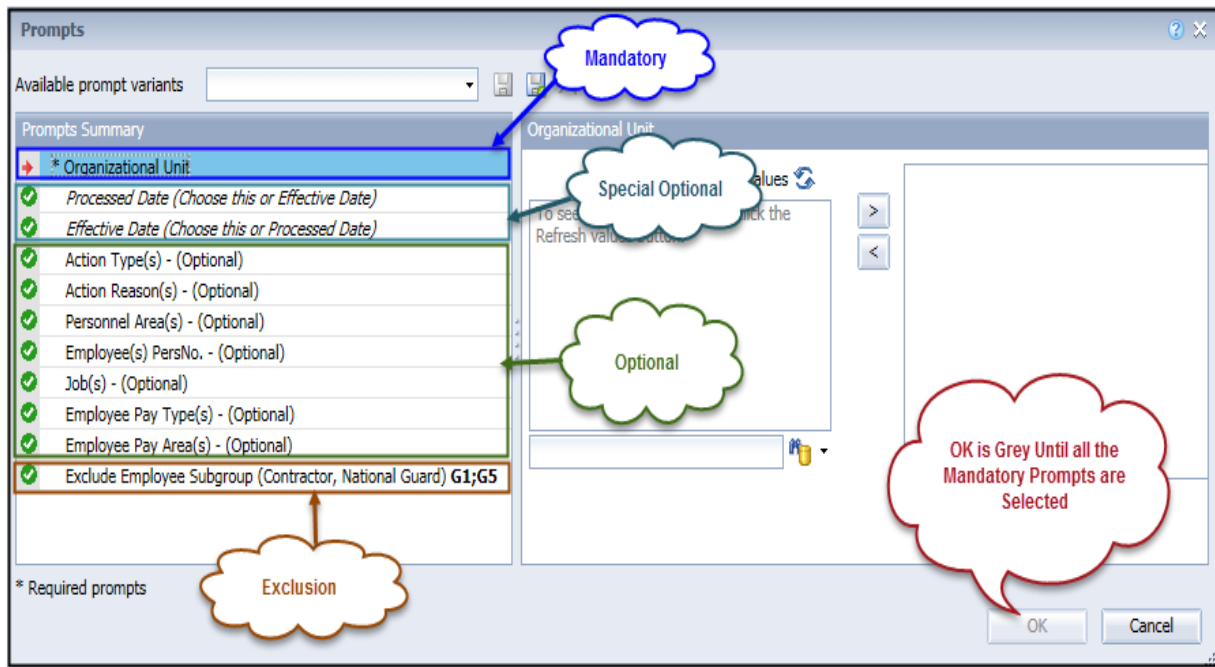**REPORT LOCATION:**

PA: Employee Actions

REPORT USES:

Action Monitoring
- Approved PCR matches information in system
- View to see if comments are attached
- Provide specific action information as needed
- Who is completing the actions

Quick Links	

How to generate this report

Mandatory Prompts

Mandatory prompts have a red arrow indicator (➜) followed by an asterisk (*) on the left side of the prompts. When a valid value(s) is entered, this indicator will turn into a green check mark (✓).

➜ *Organizational Unit:* To select data for this prompt:
- Make sure you have "Organizational Unit" prompt selected (1)
- Click on the "Refresh Values" icon to see the list of Org Units (2)
- Navigate down to the desired Org Unit (3)
- Click on the right arrow to add it to the selection box (4)
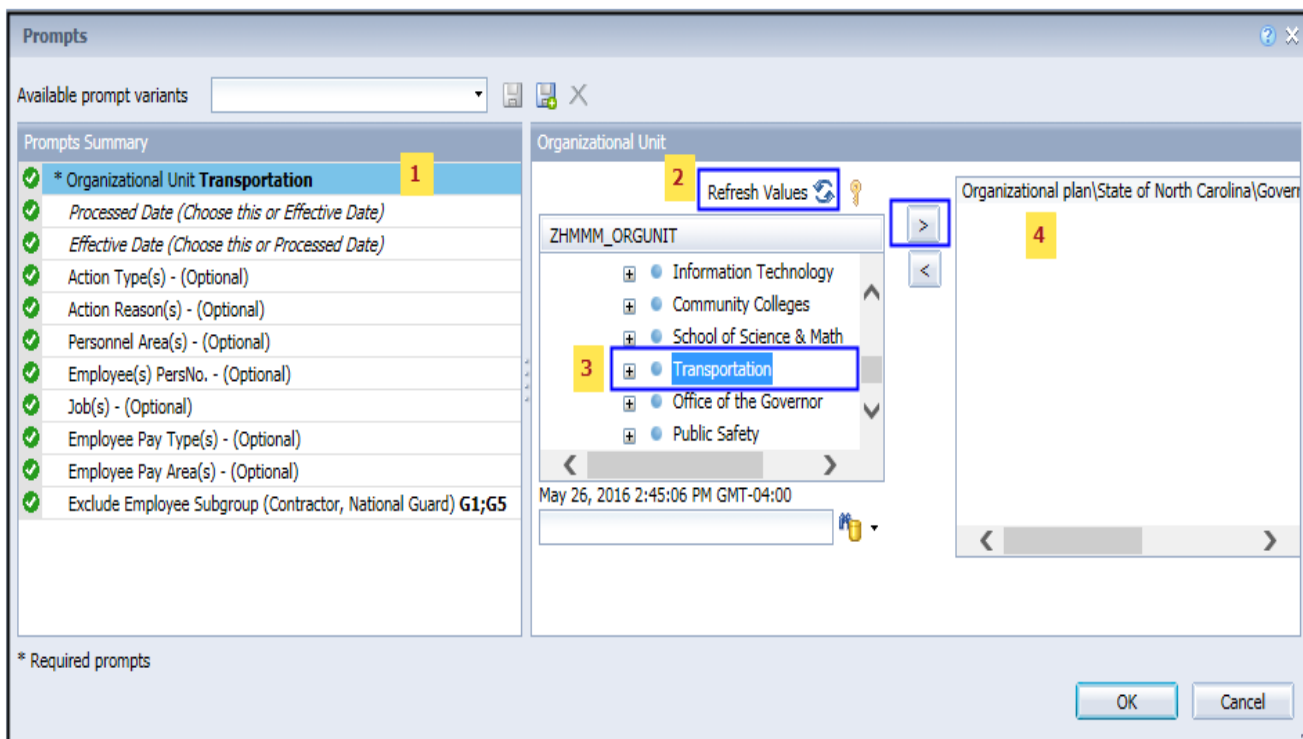
IMPORTANT!

Special Optional Prompts

Special Optional prompts are indicated with a green check mark (✓) but are not pre-filled. These prompts are designed as a group. You can use either prompt but ONE prompt from this group must be answered.

- ✓ **Processed Date (Choose this or Effective Date**)
     OR
- ✓ **Effective Date (Choose this or Processed Date**)

One of these two prompts must be selected:
- Select the prompt field first (1)
- Type in the Start date (2)
- OR click or click on the calendar icon to select the Start date (3)
- Type in the End date (4)
- OR click or click on the calendar icon to select the End date (5)
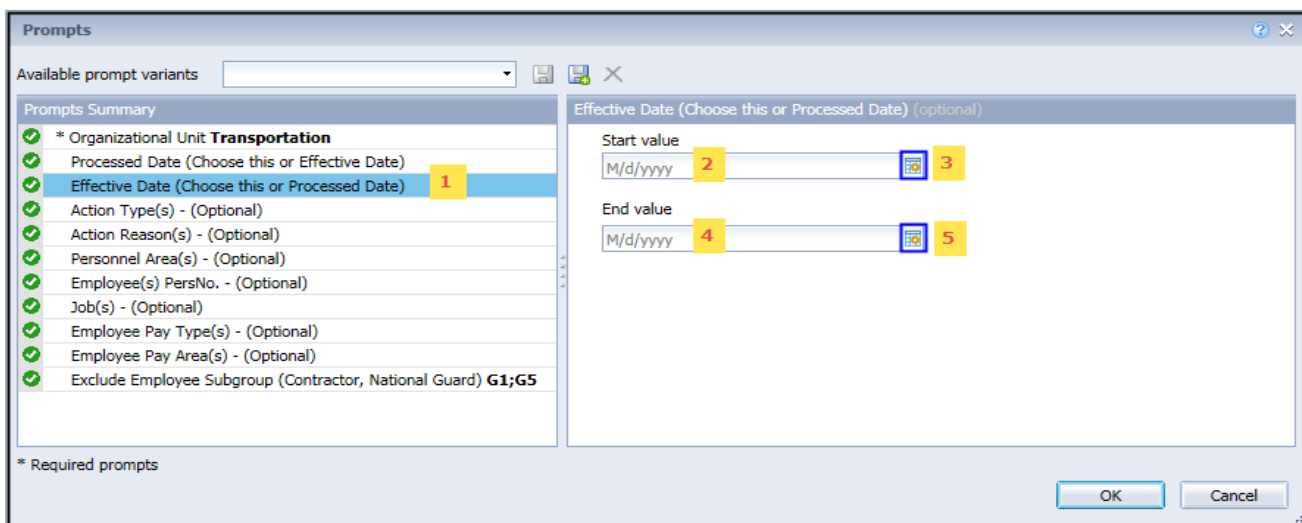
Note: Must enter OrgUnit AND Processed or Effective Date before proceeding to other prompts.
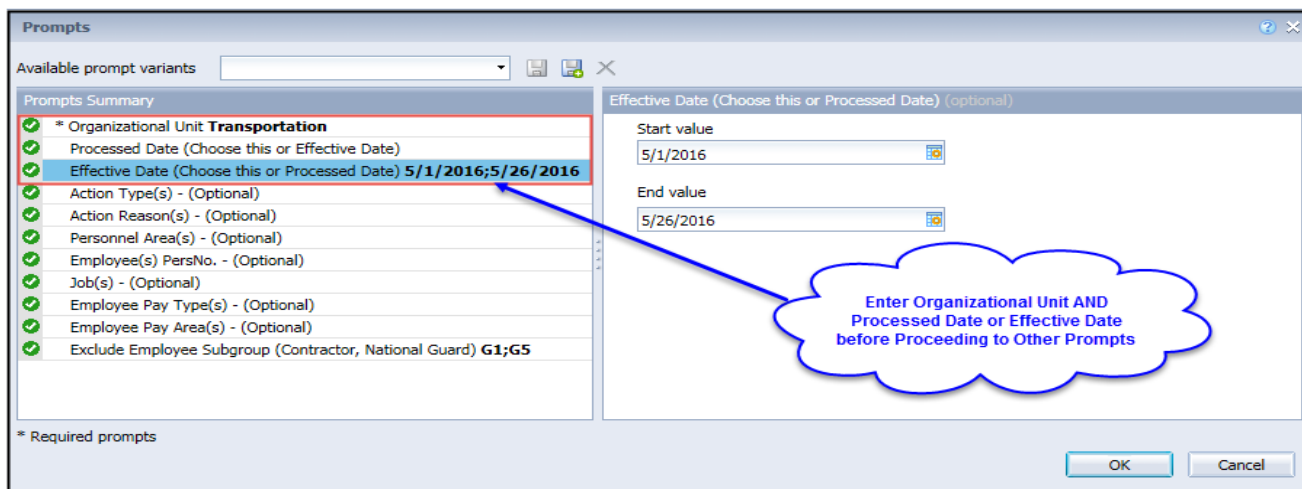
Optional Prompts

Optional prompts are indicated with a green check mark (✔) and are not required. They are used to assist in further limiting the amount of data that is retrieved into the body of the report.

NOTE:

If you search for any values in the Optional Prompts without first entering Prompt Values for **Organizational Unit** AND **Processing Date or Effective Date**, the search will not return any values.

✓   **Action Type(s) - (Optional):** To select data for this prompt:
- Make sure the "Action Type(s) - (Optional)" prompt is selected (1)
- Enter a search text with an asterisk (*) in the search box to view the list of values for Action Type (2)
- Click on the search icon (3)
- To see the key value for each Action Type, click on the key icon (4)
- Click on the desired Action Type (5)
- OR if the Action Type key or Action Type name are known, skip steps 2 through 5 and enter it directly in (6)
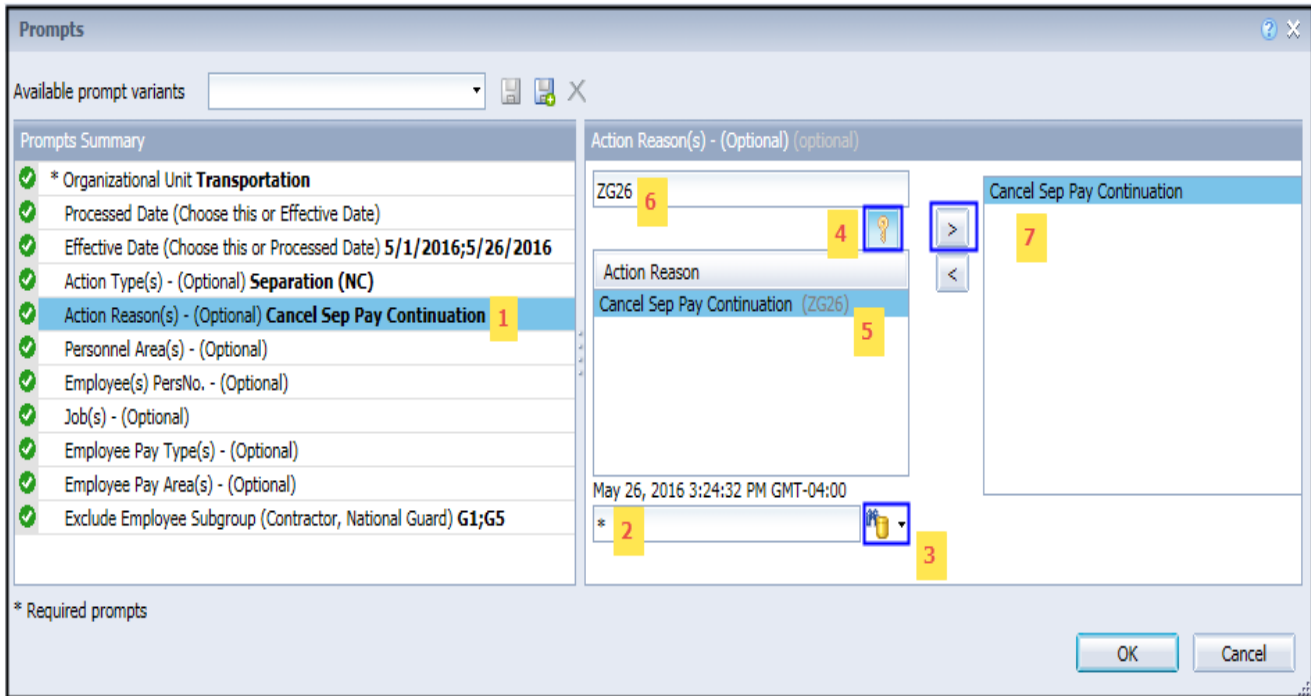- Click on the right arrow to add the Action Type to the selection box (7)
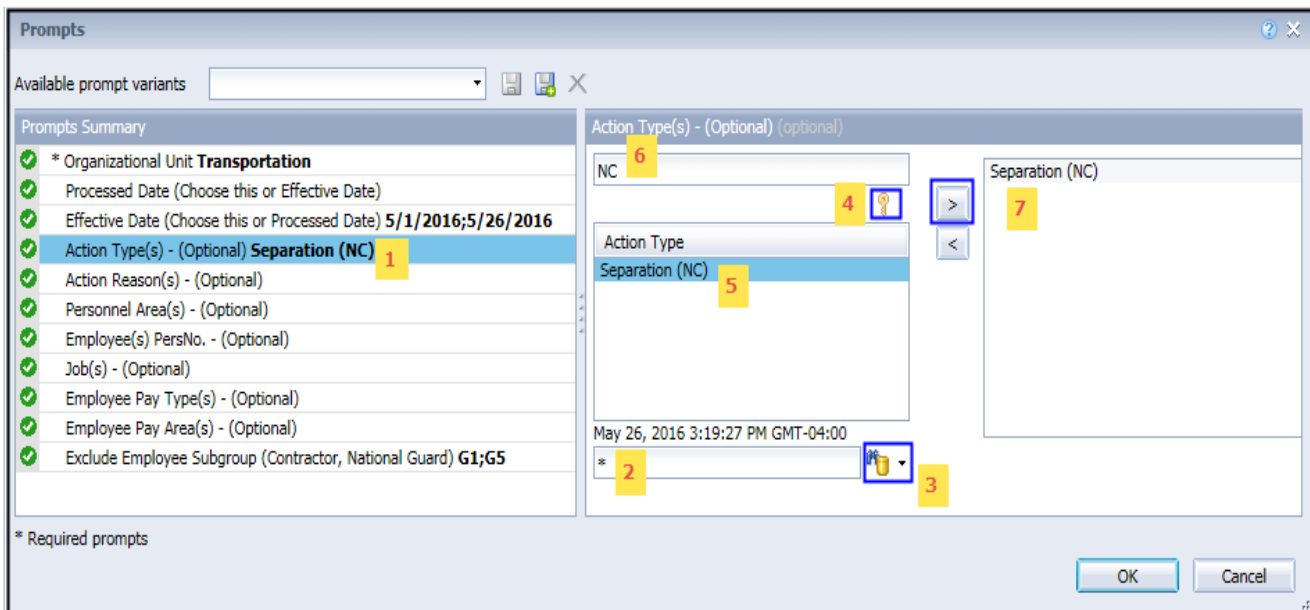
✓ **Action Reason(s) - (Optional):** To select data for this prompt:
- Make sure the "Action Reason(s) - (Optional)" prompt is selected (1)
- Enter a search text with an asterisk (*) in the search box to view the list of values for Action Type (2)
- Click on the search icon (3)
- To see the key value for each Action Reason, click on the key icon (4)
- Click on the desired Action Reason (5)
- OR if the Action Reason key or Action Reason name are known, skip steps 2 through 5 and enter it directly in (6)

  NOTE:

  Since Action Reason is Compounded with Action Type, when entering key values for Action Reason, the Action Type key & Action Reason key need to be entered together as one concatenated value. Example: ZG26 (Action Type ZG and Action Reason 26). If you are entering Text, then you can enter directly.
- Click on the right arrow to add the Action Reason to the selection box (7)

✓ **Personnel Area(s) - (Optional):** To select data for this prompt:
- Make sure the "Personnel Area(s) - (Optional)" prompt is selected (1)
- Enter a search text with an asterisk (*) in the search box to view the list of values for Personnel Area (2)
- Click on the search icon (3)
- To see the key value for each Personnel Area, click on the key icon (4)
- Click on the desired Personnel Area (5)
- OR if the Personnel Area key or Personnel Area name are known, skip steps (2) through (5) and enter it directly in (6)
- Click on the right arrow to add the Personnel Area to the selection box (7)
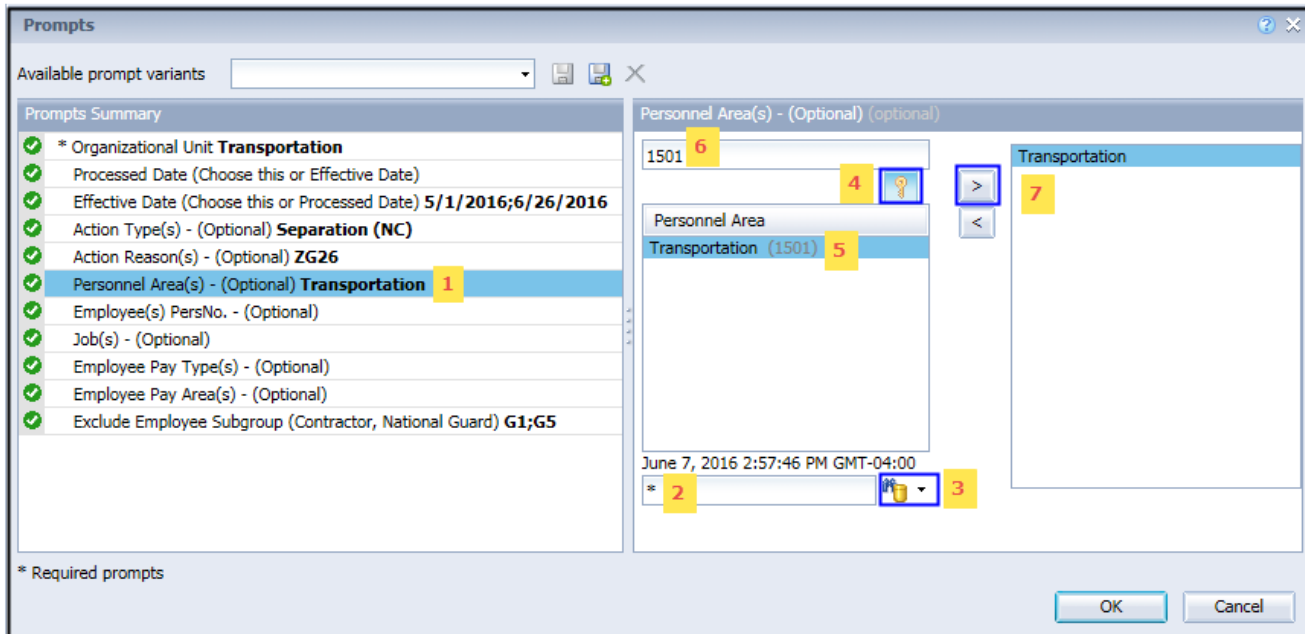
✓ **Employee(s) PersNo. - (Optional):** To select data for this prompt:
- Make sure the "Employee(s) PersNo. - (Optional)" prompt is selected (1)
- Enter an employee number in the search box to verify the employee's name (2)
- Click on the search icon drop down arrow and select "Search in key" (3)
- Then click the search icon (4)
- To see the employee number, click on the key icon (5)
- Click on the desired Employee (6)
- OR if the employee number is known, skip steps 2 through 6 and enter it directly in (7)
- Then click on the right arrow to add the Employee to the selection box (8)
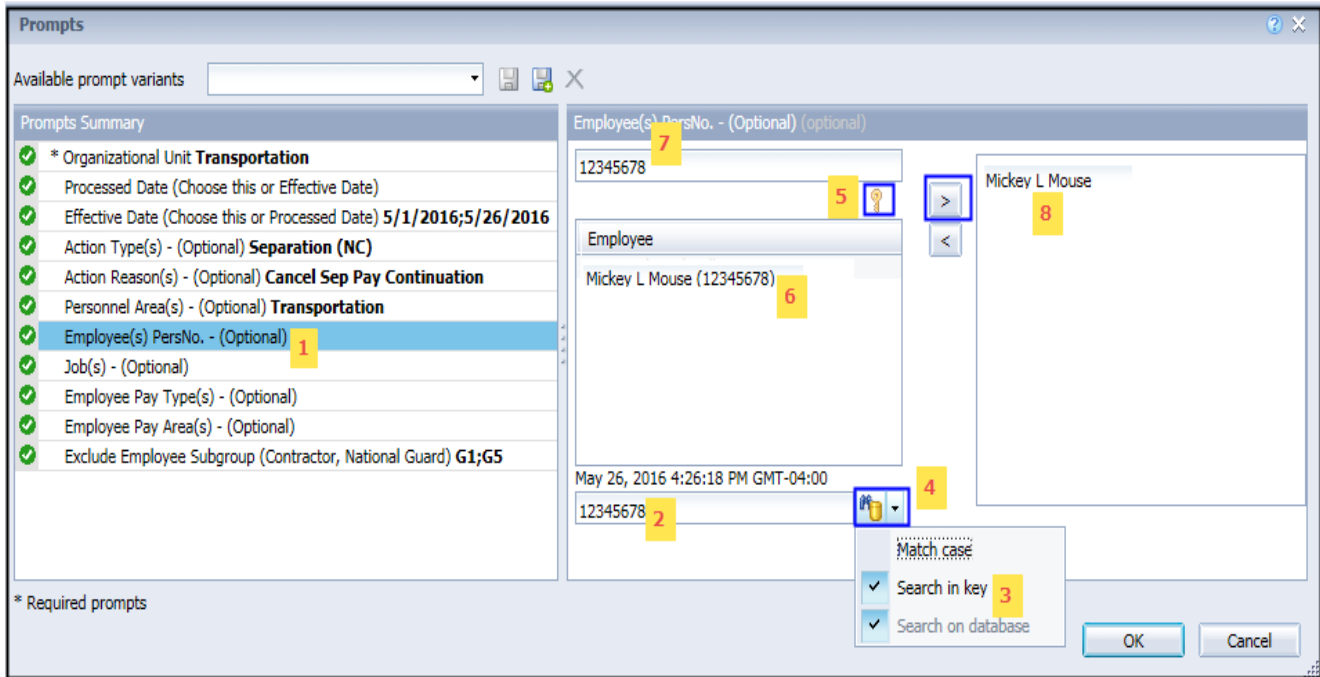
NOTE: Since the system has many employees, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If the employee number is not known and a name search must be done, narrow down the search by using the wildcard with specific text strings when looking for an employee by name such as:

- John*John*
- *Doe

If the employee number is known, it is best to use the manual entry field (in step 7) to enter the selection.

✓ **Job(s) - (Optional):** To select data for this prompt:
- Make sure the "Job(s) - (Optional)" prompt is selected (1)
- Enter a search text with an asterisk (*) in the search box to view the list of values for Jobs (2)
- Click on the search icon (3)
- To see the key value for each Jobs, click on the key icon (4)
- Click on the desired Job (5)
- OR if the Job number or Job title already are known, skip steps (2) through (5) and enter it directly in (6)
- Click on the right arrow to add the Job to the selection box (7)

✓ **Employee Pay Type(s) - (Optional):** To select data for this prompt:
  - Make sure the "Employee Pay Type(s) - (Optional)" prompt is selected (1)
  - Enter a search text with an asterisk (*) in the search box to view the list of values for Employee Pay Types (2)
  - Click on the search icon (3)
  - To see the key value for each Employee Pay Type, click on the key icon (4)
  - Click on the desired Employee Pay Type (5)
  - OR if the Employee Pay Type key or Employee Pay Type name are known, skip steps (2) through (5) and enter it directly in (6)
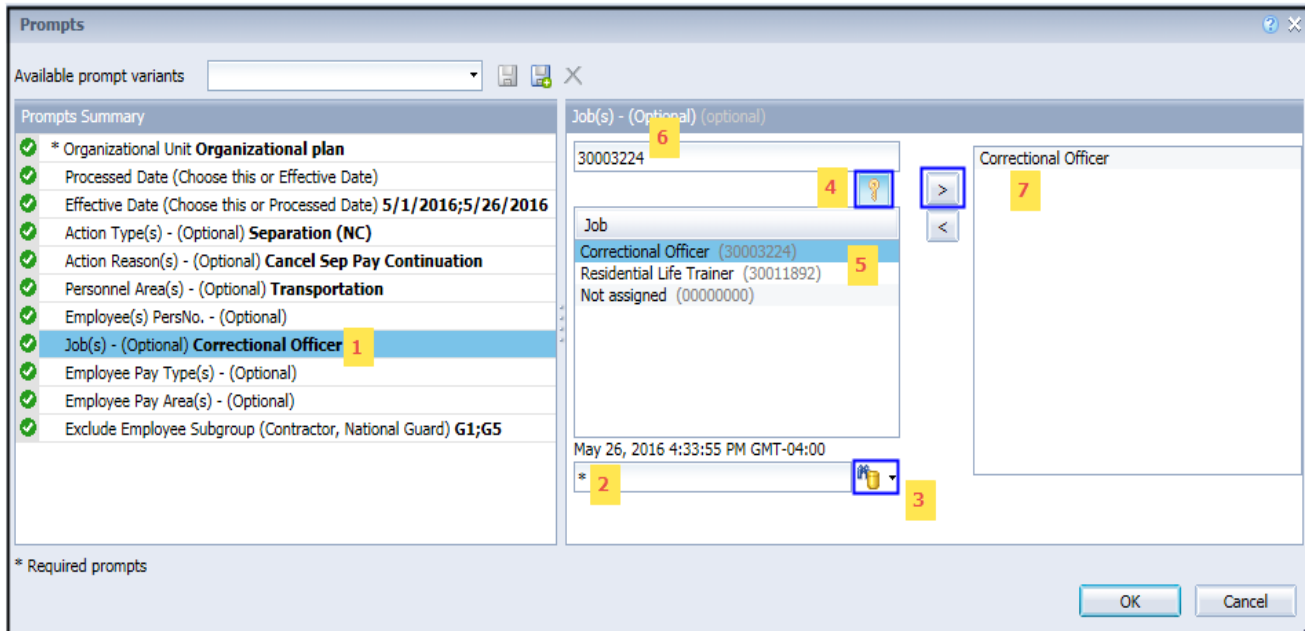 - Click on the right arrow to add the Employee Pay Type to the selection box (7)
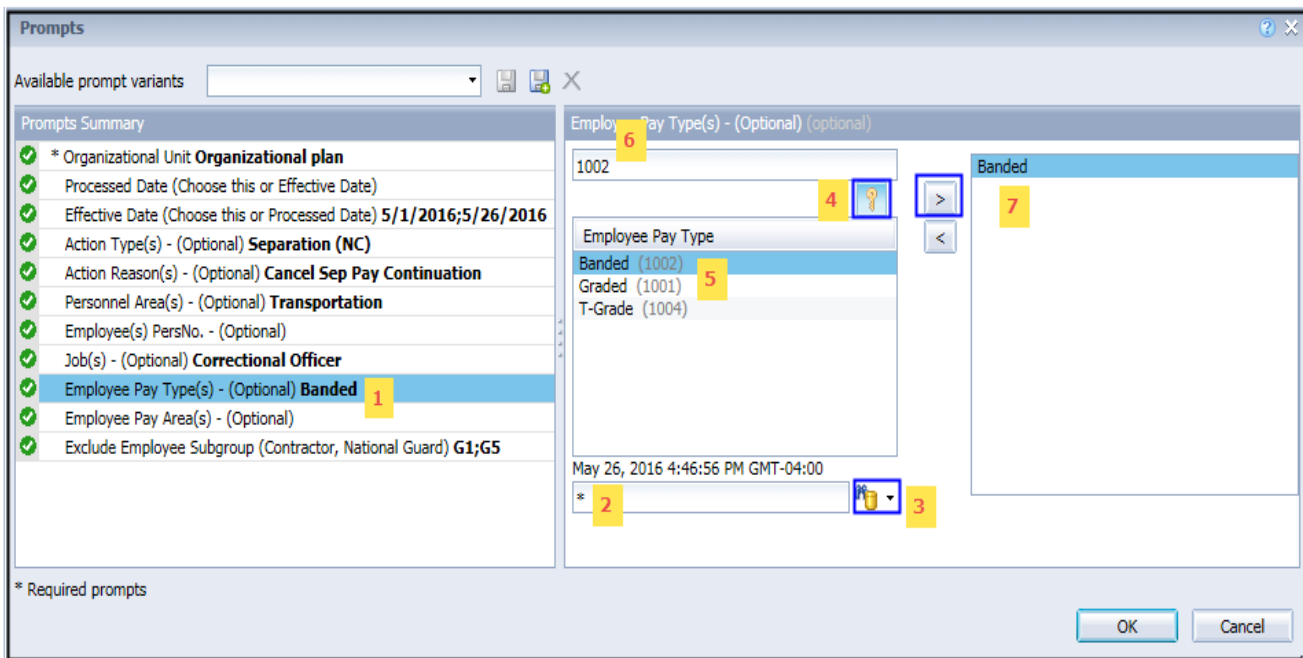
✓ **Employee Pay Area(s) - (Optional):** To select data for this prompt:
- Make sure the "Employee Pay Area(s) - (Optional)" prompt is selected (1)
- Enter a search text with an asterisk (*) in the search box to view the list of values for Employee Pay Areas (2)
- Click on the search icon (3)
- To see the key value for each Employee Pay Area, click on the key icon (4)
- Click on the desired Employee Pay Area (5)
- OR if the Employee Pay Area key or Employee Pay Area name are known, skip steps (2) through (5) and enter it directly in (6)
- Click on the right arrow to add the Employee Pay Area to the selection box (7)
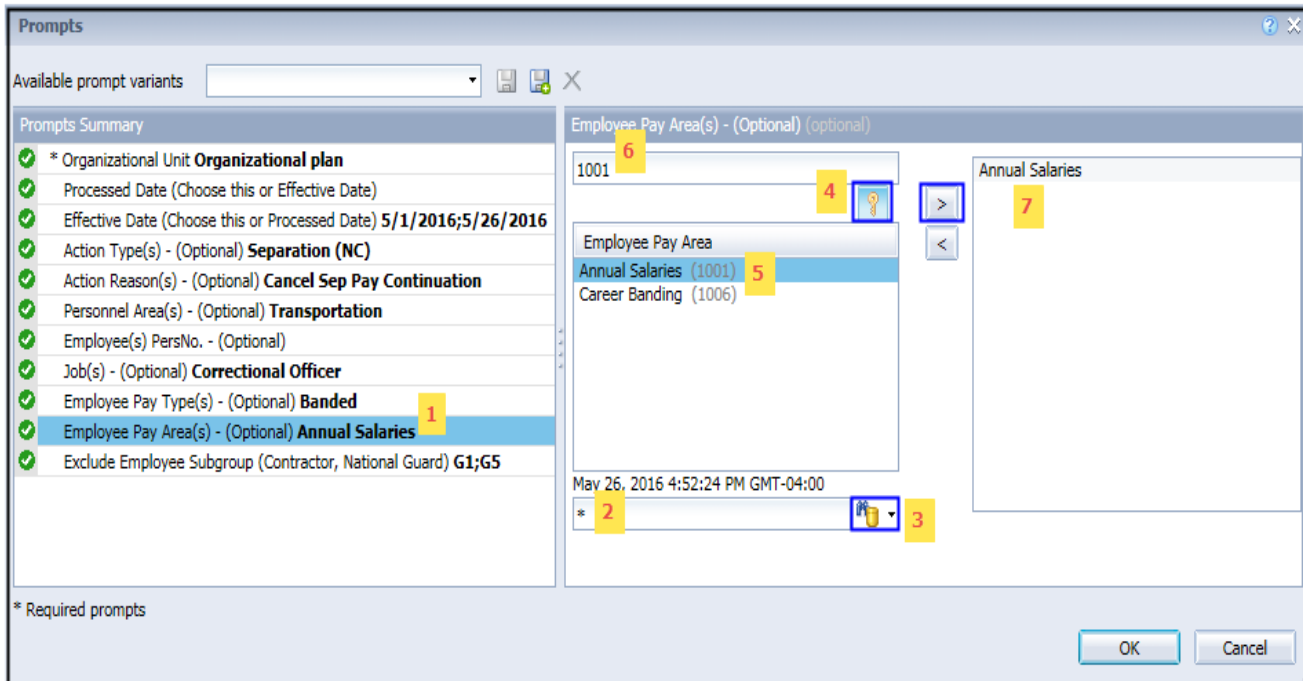
Exclusion Prompts

Exclusion prompts are indicated with a green check mark (✓) but are generally prefilled with a specific set of data values. They are provided to exclude specified data by default while allowing customers the flexibility of changing them when necessary. Any rows containing data values listed in the exclusion selection box will not be fetched into the report.

✓ **Exclude Employee Subgroup (Contractors) G1**
   To remove this exclusion

- Make sure the "Exclude Employee Subgroup" prompt is selected (1)
- Click on one or more Employee Subgroup(s) to remove from the 'Selected Value(s) box (2)
- Click on the left arrow icon to remove the desired Employee Subgroup(s) (3)
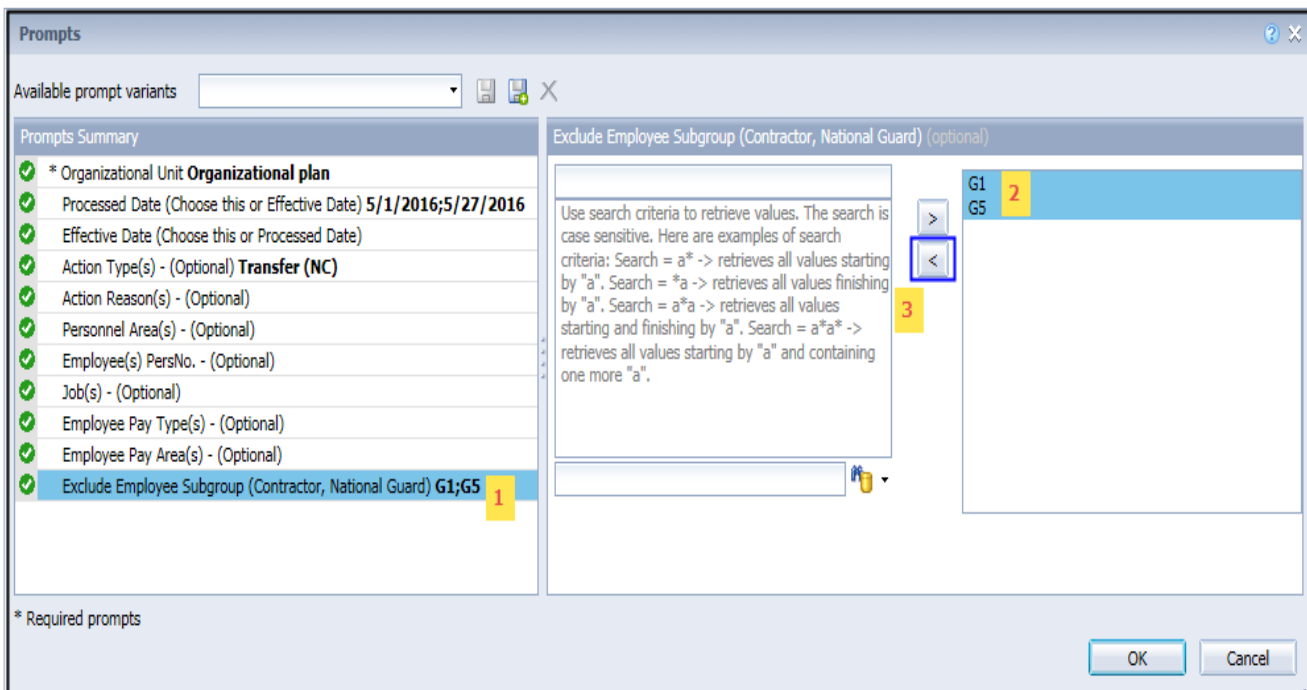
Initial Layout

The report lists all actions based on the prompt selections. Below is a sample of the initial layout rendered.

BP179: Employee Action Detail

Effective Date: 5/1/2016 - 6/6/2016

Personnel Area	Org Unit	Org Unit Desc	Employee	Employee's Name	Original Hire Date	Effective Date	Processed Date	PCR ID	Changed By
Transportation	11111111	DOT Office of the General Counsel	12345678	MOUSE, MICKEY	2/27/2013	5/2/2016	5/20/2016	1000600703	Pamela Mitchell Mckelvy
	22222222	DOT Chief Deputy	98765432	DUCK, DONALD	9/3/1994	5/7/2016	5/2/2016	1000598446	John Alexander

Continued….

Execution Date : 6/6/16

Action Type	Action Type Desc	Action Reason	Action Reason Desc	Job	Job Desc	Position	Position Desc	Employee Pay Type
Z2	Reinstatement/Reemployment(NC)	04	Return to State within 5 years	30011226	Agency General Counsel II	55555555	General Counsel Sr. Advisor	T-Grade
Z8	Transfer (NC)	60	Within Agency Reorganization	31000043	Business Systems Analyst	66666666	Business Systems Analyst	Banded

Continued…

Employee Pay Area	Employee Pay Group	Employee Pay Level	Annual Salary	Prior Salary	Salary Change	% Change	Compa Ratio	Comments?	Number of Actions
Annual Salaries	TG85	#	125,000.00	71,480.00	53,520.00	74.87	1.25	#	1
Career Banding	31000043	A	100,000.00	100,000.00	0.00	0.00	1.12	X	1
Personnel Area - Transportation									2
Total									2

Click on "X" hyperlink to Jump to "B0022: Comments"

B0022: Comments

Employee	98765432 - Donald Duck
Organizational Unit	22222222 - DOT Chief Deputy
Position	66666666 - Business Systems Analyst
Infotype	0000 - Actions
Subtype	# - Not assigned
Valid From - Valid To	5/7/16 - 12/31/99

Transfer#

Bugs R. Bunny, 04/28/2016#

Position Transfer, Effective 05/07/2016#

Position 66666666, Business Systems Analyst Advanced and Employee

Donald Duck 98765432 is being transferred to org unit 22222222 and

will be reporting directly to Chief Deputy Minnie Mouse (61111111).

There will be no change in salary, budgeted salary, or costcenter.

Available Objects

This is a list of the available objects that can be added to the report, once in Design mode:

```
☐ 📄 BP179: Employee Action Detail          🔹 Pos Addr Street
  ⊞ 🔹 Action Reason                          🔹 Pos City
  ⊞ 🔹 Action Type                         ⊞ 🔹 Pos County
     🔹 Agency Hire Date                   ⊞ 🔹 Position
  ⊞ 🔹 Age Range                              🔹 Position Chief
  ⊞ 🔹 Changed By                         ⊞ 🔹 Prior Position
     🔹 Comments?                             🔹 Processed Date
  ⊞ 🔹 Country                            ⊞ 🔹 SOC Code
  ⊞ 🔹 EEO Category                       ⊞ 🔹 SOC State Subcat
  ⊞ 🔹 Effective Cal Mth/Yr               ⊞ 🔹 State
     🔹 Effective Cal Yr                   ⊞ 🔹 Supv Employee
     🔹 Effective Date                     ⊞ 🔹 Supv Position
  ⊞ 🔹 Effective Fiscal Period               🔹 Valid To
  ⊞ 🔹 Effective Fiscal Year                 📊 Annual Salary
  ⊞ 🔹 Employee                              📊 Change in Salary
     🔹 Employee's Name                      📊 Emp Reference Salary
  ⊞ 🔹 Employee Group                        📊 FTE Annual Salary
  ⊞ 🔹 Employee Pay Area                     📊 Job Reference Salary
  ⊞ 🔹 Employee Pay Group                    📊 Number of Actions
  ⊞ 🔹 Employee Pay Level                    📊 Pct Chg in Salary
  ⊞ 🔹 Employee Pay Type                     📊 Prior Salary
  ⊞ 🔹 Employee Subgroup                     📊 Related Education Month(s)
  ⊞ 🔹 Employment Status                     📊 Related Work Experience Month(s)
     🔹 ESG CAP                        ☐ 📁 Variables
  ⊞ 🔹 Ethnic Origin                         🔹 Processed in Cal Mth/Yr
  ⊞ 🔹 Gender                                🔹 Processed in Cal Yr
  ⊞ 🔹 Job                                   🔹 Prompt Response Action Reason
  ⊞ 🔹 Job Branch                            🔹 Prompt Response Action Type
  ⊞ 🔹 Job Family                            🔹 Prompt Response Effective Date
     🔹 Judicial Annv Date                   🔹 Prompt Response Employee Pay Area
     🔹 Length of Serv. as of Date of Action 🔹 Prompt Response Employee Pay Type
     🔹 Next Increase Date                   🔹 Prompt Response Employee PersNo
  ⊞ 🔹 Organizational Unit                   🔹 Prompt Response Exclude Employee Subgroup
     🔹 Original Hire Date                   🔹 Prompt Response Job
  ⊞ 🔹 Payroll Area                          🔹 Prompt Response Organizational Unit
     🔹 PCR ID                               🔹 Prompt Response Personnel Area
  ⊞ 🔹 Personnel Area                        🔹 Prompt Response Processed Date
  ⊞ 🔹 Personnel Subarea                     📊 Compa Ratio
                                            📊 Emp / Job Ref Salary
```

Special Report Considerations/Features

- Action records in PMIS have been converted to the Integrated HR-Payroll System action code equivalent for employee actions. Where no equivalent was available for an employee action, a Z# or X# employee action type was generated using the original PMIS action description.

- Annual Salary is displayed in two decimal places in this report as the repot will have Hourly Salary for Temps

- The 'Emp/Job Ref Salary' represents the Employee Reference Rate for Banded pay types; for all other pay types, it represents the Job Reference Rate.

- If you search for any values in the Optional Prompts without first entering Prompt Values for **Organizational Unit** AND **Processing Date or Effective Date**, then the search will not return any values.

- If one or more completed PCRs exist for an action, the "Processed Date" available object is populated with the "changed on" date from the most recent completed PCR. Also, the "Changed By" available object is populated with the user who made the change on the completed PCR. If no completed PCR exists for the action, then the Processed Date is populated with the "Changed on" date from the action, and the "Changed by" is populated with the user who made the change on the action.

- When you enter values for both Processing Date and Effective Date prompts, then you will get the following notification message at the top of the report.

BP179: Employee Action Detail

Processed Date: 5/1/2016 - 5/27/2016 AND Effective Date: 4/1/2016 - 4/30/2016

Both Process Date and Effective Date used for input. Results filtered for both dates. ←

Change Record

- 5/26/16
  - o Added Optional Prompts **Personnel Area(s), Job (s), Employee Pay Type(s)** and **Employee Pay Area(s).**
  - o Added **Employee Pay Type, Employee Pay Level, Employee Pay Area, Employee Pay Group** and **Compa Ratio** to Default Layout of the Report.
  - o **Compa Ratio** is calculated Based on Employee Reference Salary, Job Reference Salary and FTE Annual Salary.
  - o The Formula for **Compa Ratio** is *"(FTE Annual Salary) divided by (Emp / Job Ref Salary)"*. 'Emp /Job Ref Salary' represents the Employee Reference Rate for Banded pay types; for all other pay types, it represents the Job Reference Rate.
- 12/15/16
  - o BI Transfers out (X8) actions are now included on the report
  - o Judicial Anniversary Date has been added as an available object
- 12/2017
  - o The Processed Date available object was modified to be populated with the "changed on" date from the most recent completed PCR. If no completed PCR exists, then the Processed Date is populated with the "changed on" date of the action.
  - o The "changed by" available object was also modified to be populated with the user who made the change on the most recent completed PCR. If no completed PCR exists, the "Changed by" available object is populated with the user who made the change on the action.
- 6/17/21 - Added **Related Work Experience Month(s)** and **Related Education Month(s)** to Available Objects.
- 6/17/21 – Updated format and assigned reference number – C. Ennis
- 6/17/21- Added Alt Text updated Quick Links. L. Lee
- 7/7/22 - Added National Guard Status to Employee Attributes (expanded list) in Available Objects. Also, added Field/Home Based, Short Text, and Address Suppl to Position Attributes (expanded list) in Available Objects. S. Rich