EMPLOYEE PERSONAL DATA
REPORT DESCRIPTION B0037 | WEB INTELLIGENCE

BOBJ

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

Report Description

The B0037: Employee Personal Data report provides a list of employees who are currently active within the organizational unit selected. This report provides personal details about an employee such as home address, emergency contact information, and birth date.

Report Location

PA: Employee Details

Report Uses

- This report can be used to obtain the permanent addresses for employees if there is a need to mail information to employees' home addresses.

- It can be used to obtain emergency contact information for an individual employee or for all employees within an org unit in the event of a disaster or a state of emergency.

- This report contains date of birth, so it can be used in circumstances where there is a business need to gather this information for a group of employees.

- The report also contains only the month and day of birth date, and it can be used to compile a birthday list for employees within an org unit.

Quick Links	

How to generate this report
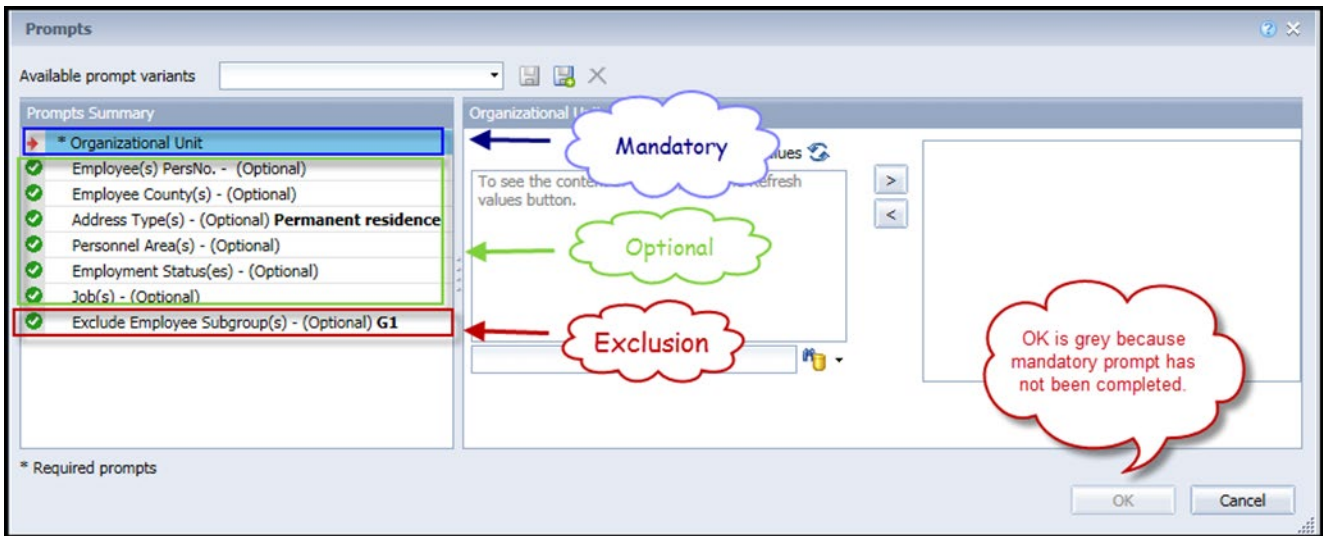
Mandatory Prompts

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 the "Organizational Unit" prompt is 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)
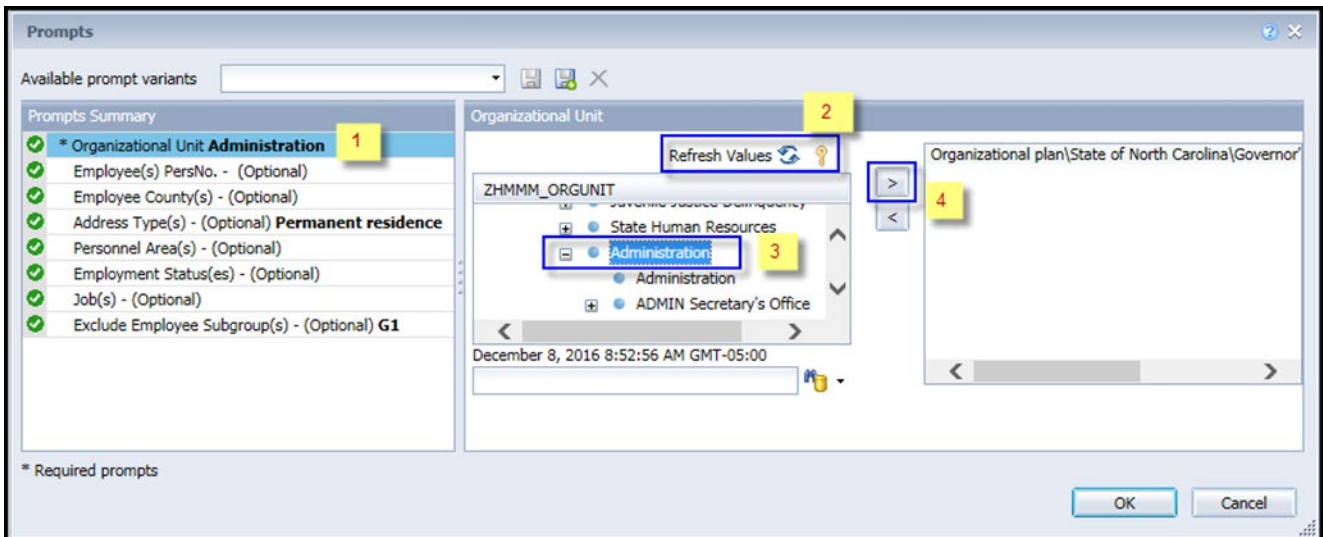
Optional Prompts

Optional prompts are indicated with a green check mark (✔) but are not required. Sometimes they are pre-filled with a default value. They are used to assist with limiting the amount of data that is retrieved into the body of the report.

✓ **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 name (2)
- Click the search icon drop down arrow and select "Search in key" (3)
- Click the search icon (4)
- To see the employee number, click the key icon (5)
- Select the desired Employee (6)
- OR, if you do not need to verify the employee number, you can skip steps 2 through 6 and enter it directly in (7)
- Click the right arrow to add the Employee to the selection box (8)
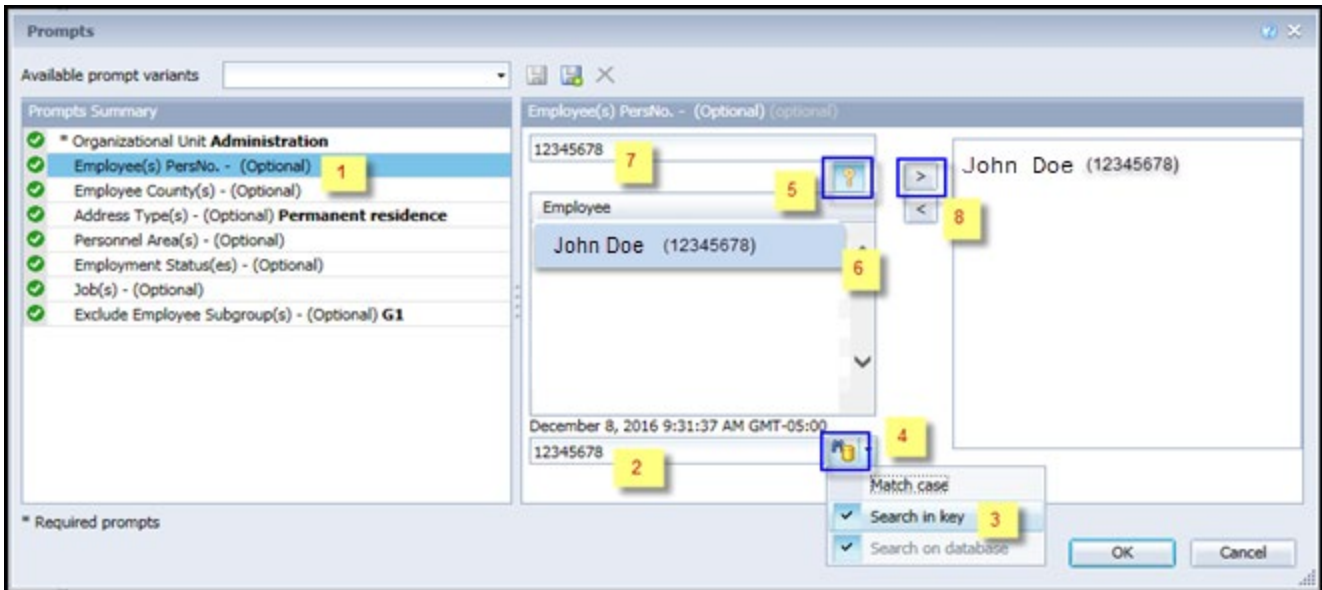
NOTE: Since we have many employees in the system, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If you do not know the employee number and must do a name search, you can narrow down your search by using the wildcard with specific text strings when looking for an employee by name such as:
Jane*Doe*
*Doe

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

✓ **Employee County(s) - (Optional):** To select data for this prompt:
- Make sure the 'Employee County(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 County (2)
- Click the search icon (3)
- Select the desired Employee County (4)
- OR, if you know the Employee County name, you can skip steps 2 through 4 and enter it directly in (5)
  Note: Must enter name in ALL CAPs.
- Click the right arrow to add the Employee County to the selection box (6)
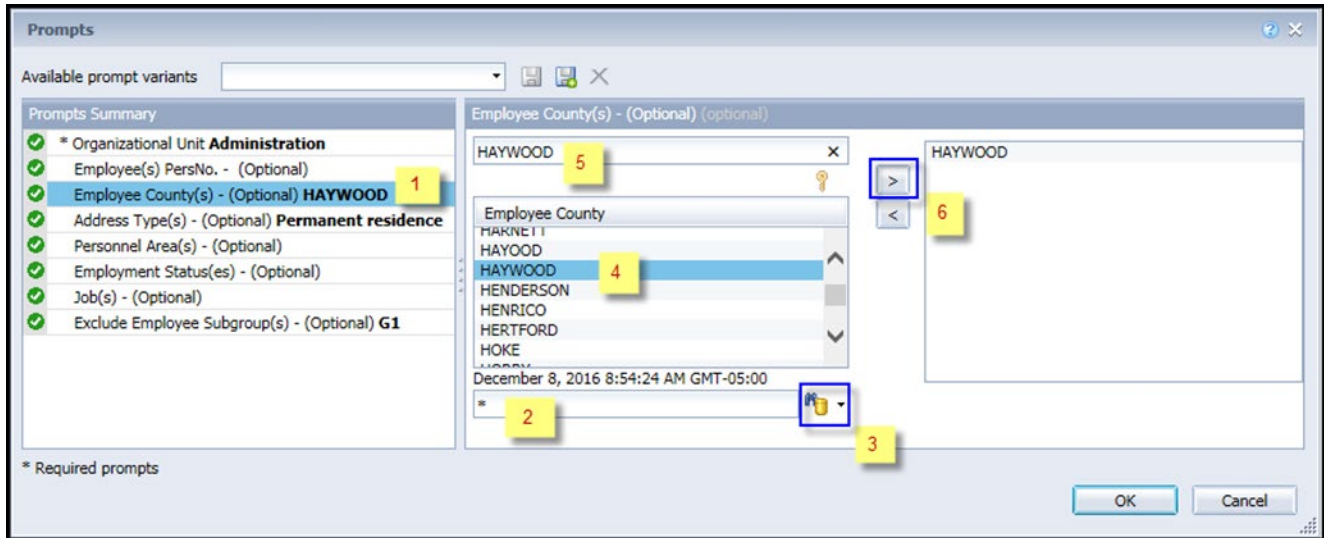
✓ **Address Type(s) - (Optional):** This prompt defaults to Permanent residence.
To remove the default (this will allow all Address Types to render in report):
   - Make sure the 'Address Type(s) - (Optional)' prompt is selected (1)
   - Select "Permanent residence" in the right box (2)
   - Click the left arrow to remove from the selection box (3)
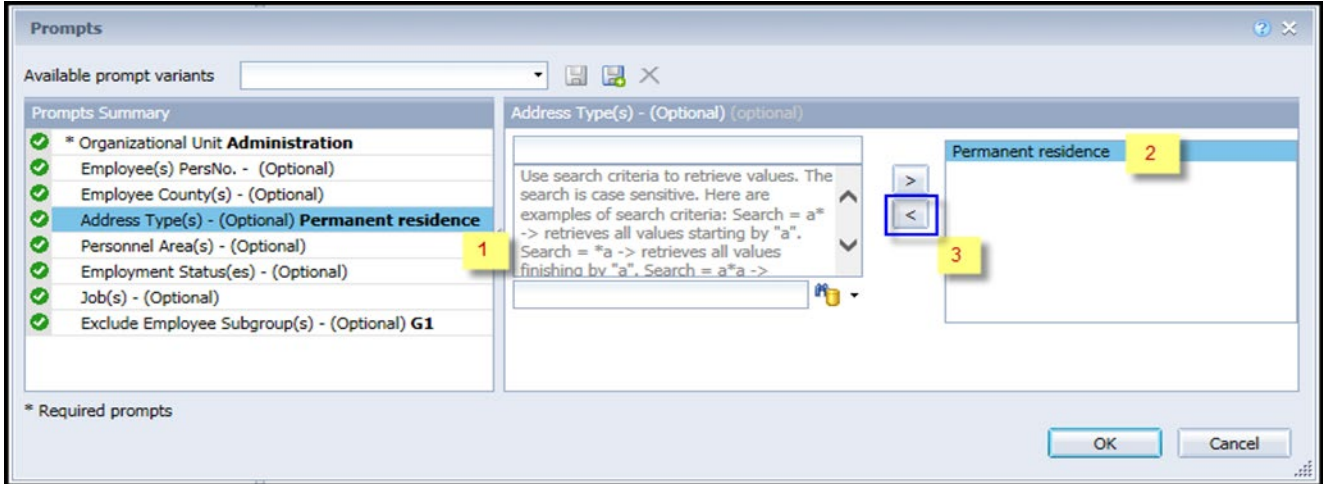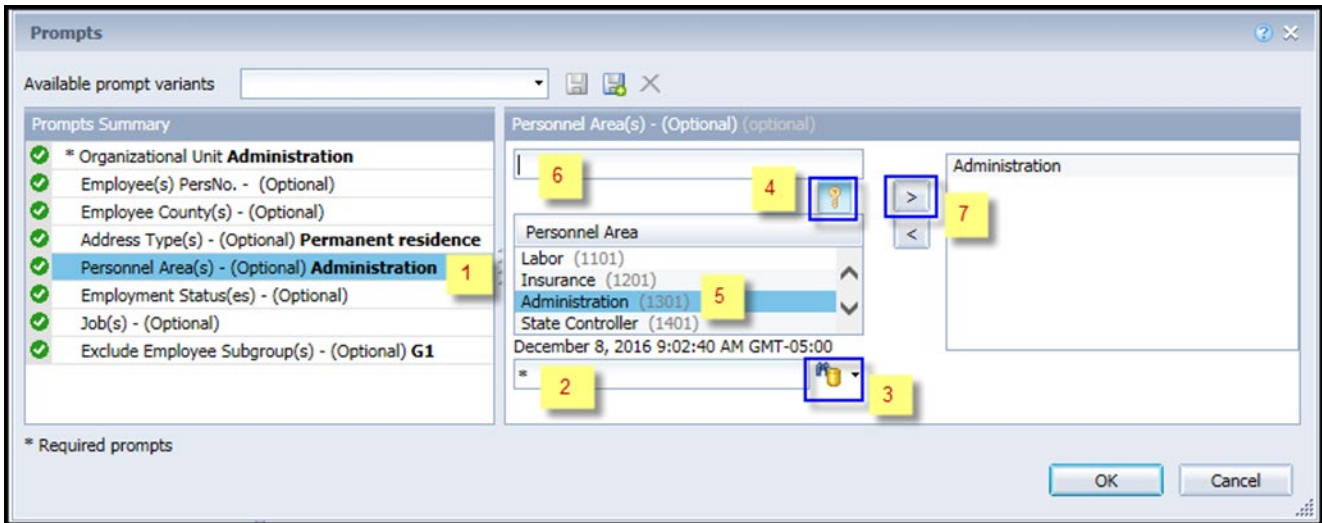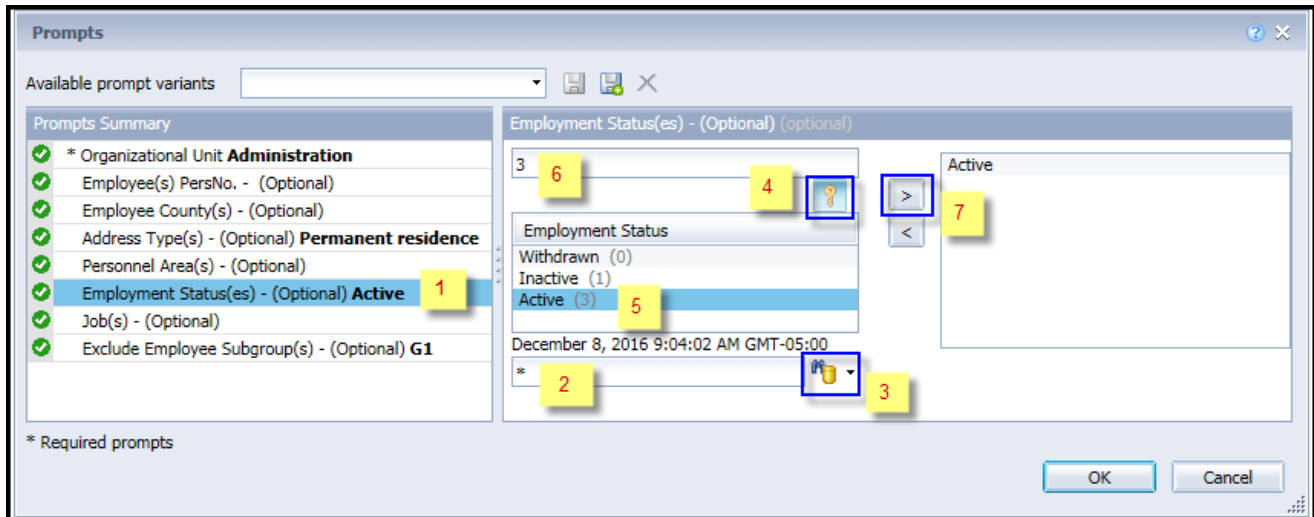
To select a different Address Type:
- Make sure the 'Address Type(s)' prompt is selected (1)
- Enter a search text with an asterisk (*) in the search box to view the list of values for Address Type (2)
- Click the search icon (3)
- To see the key value for each Address Type, click the key icon (4)
- Select the desired Address Type (5)
- **OR**, if you know the Address Type key or Address Type name, you can skip steps 2 through 5 and enter it directly in (6)
- Click the right arrow to add the Address Type to the selection box (7)
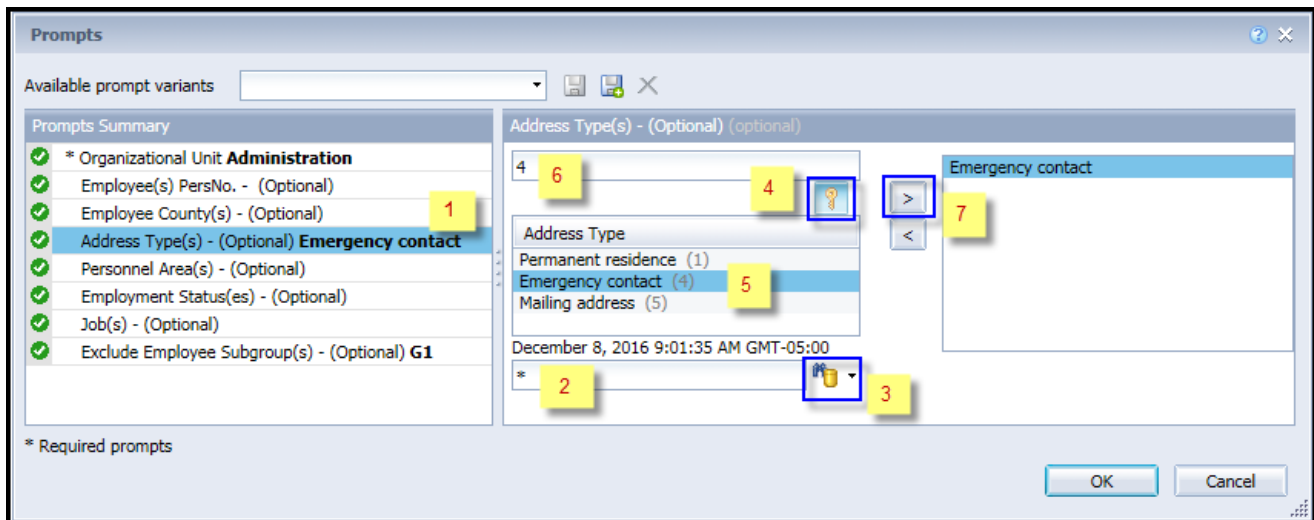
✓ **Personnel Area(s). - (Optional):** To select data for this prompt:
  - Make sure the 'Personnel Area(s) - (Optional)' prompt is selected (1)
  - Enter a search text with an asterisk (*) in the search box to view the list of values for Personnel Area (2)
  - Click on the search icon (3)
  - To see the key value for each Personnel Area, click the key icon lick the search icon (4)
  - Select the desired Personnel Area (5)
  - **OR**, if you know the Personnel Area key or Personnel Area name, you can skip steps 2 through 5 and enter it directly in (6)
  - Click the right arrow to add the Personnel Area to the selection box (7)

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

✓ **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 Job (2)
  - Click on the search icon (3)
  - To see the key value for each Job, click the key icon (4)
  - Select the desired Job (5)
  - **OR**, if you know the Job key or Job name, you can skip steps 2 through 5 and enter it directly in (6)
  - Click the right arrow to add the Job to the selection box (7)
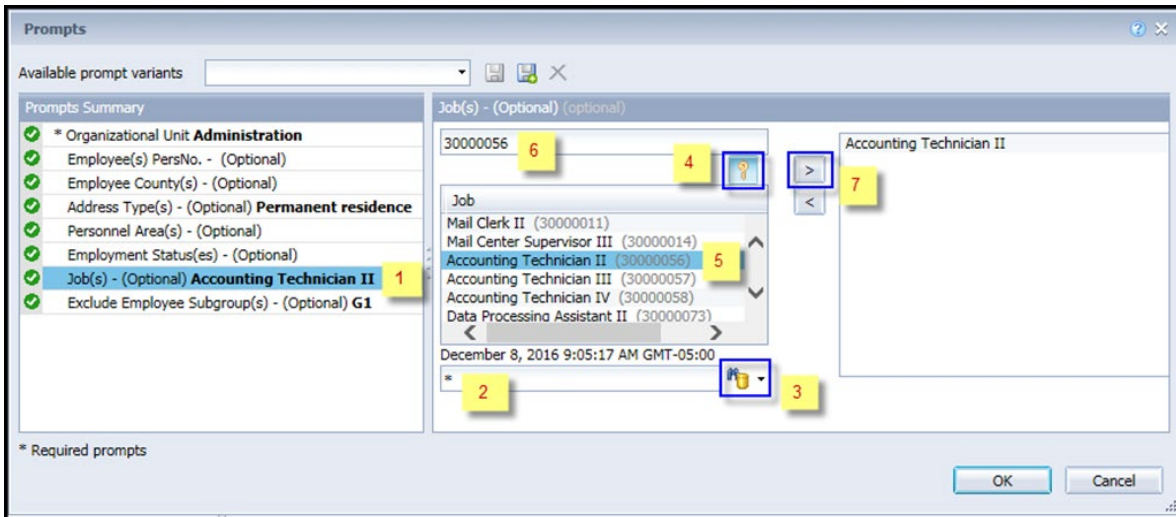
Exclusion Prompts

Exclusion prompts are also 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(s) - (Optional) G1:** To remove this exclusion:
- Make sure the Exclude Employee Subgroup(s) prompt is selected (1)
- Select the G1 value in the right box (2)
- Click the left arrow icon to remove the G1 exclusion (3)
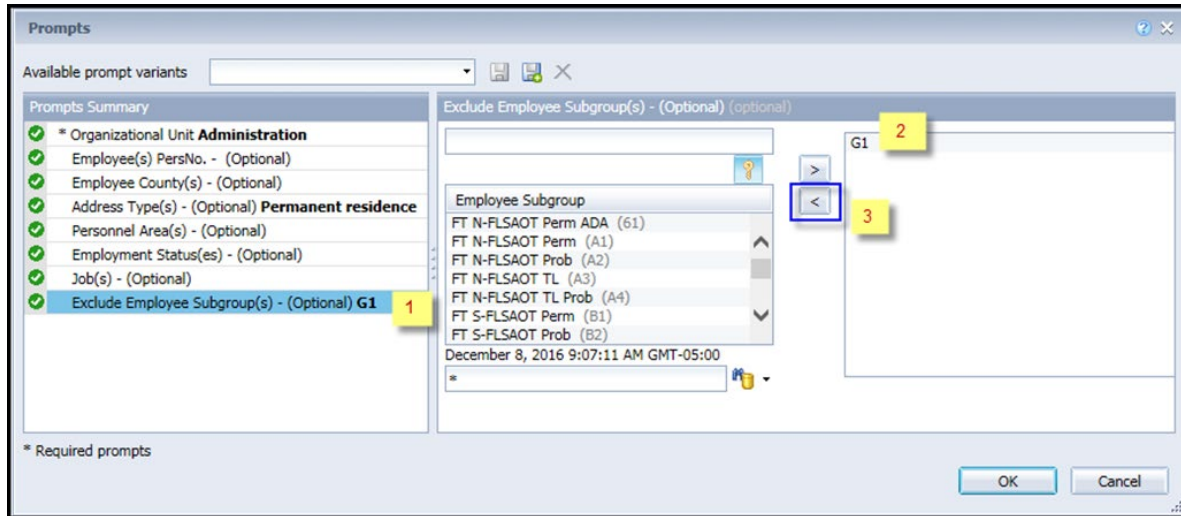
Initial Layout

The report is generated with a list of employees who have a valid current address in the system for the organizational unit selected. Below is a sample rendering.

B0037: Employee Personal Data

Employee's Name	Employee	Address Type	Address Line 1	Contact Name	Address Line 2
DOE, JOHN	100	Permanent residence	1 way		

Continued….

City	County	State	Postal Code	Telephone #	Address Change Date
Raleigh		NC	27609	#	4/21/08

Available Objects

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

Special Report Considerations/Features

- The report defaults to generating list of all employees who have a current address with a valid to high-date of 12/31/9999.
- The data is refreshed daily and is current as of the close of business from the previous business day.
- Contractors are excluded by default. This can be changed.
- 'EE Telework Eligible' and 'EE Telework Type' can be added to report by expanding the Employee attributes (expanded list) in Available Objects.

Change Log

- 12/16/2015 – Initial version
- 12/8/2016 – New Prompt on Personnel Area added
- 12/8/2016 - Age and Length of Service added to Available Objects
- 3/31/2021 – Added EE Telework Eligible and EE Telework Type to Employee attributes (expanded list) in Available Objects
- 3/31/2021 – Updated format and added ALT text. L.Lee
- 7/7/2022   Added National Guard Status to Employee Attributes (expanded list) in Available Objects