B0039 Employee Licenses, Certifications & Registrations

Report Description:

B0039: Employee Licenses, Certifications & Registrations report counts the total number of employees holding specific licenses and the total number of expired licenses by org unit.

Report Location:

PA: Certification and Qualifications

Report uses:

- This report counts the total number of employees holding specific licenses and the total number of expired licenses by org unit.
- This report is used to monitor the validity of required licenses, certifications and registrations that employees need for their job functions.
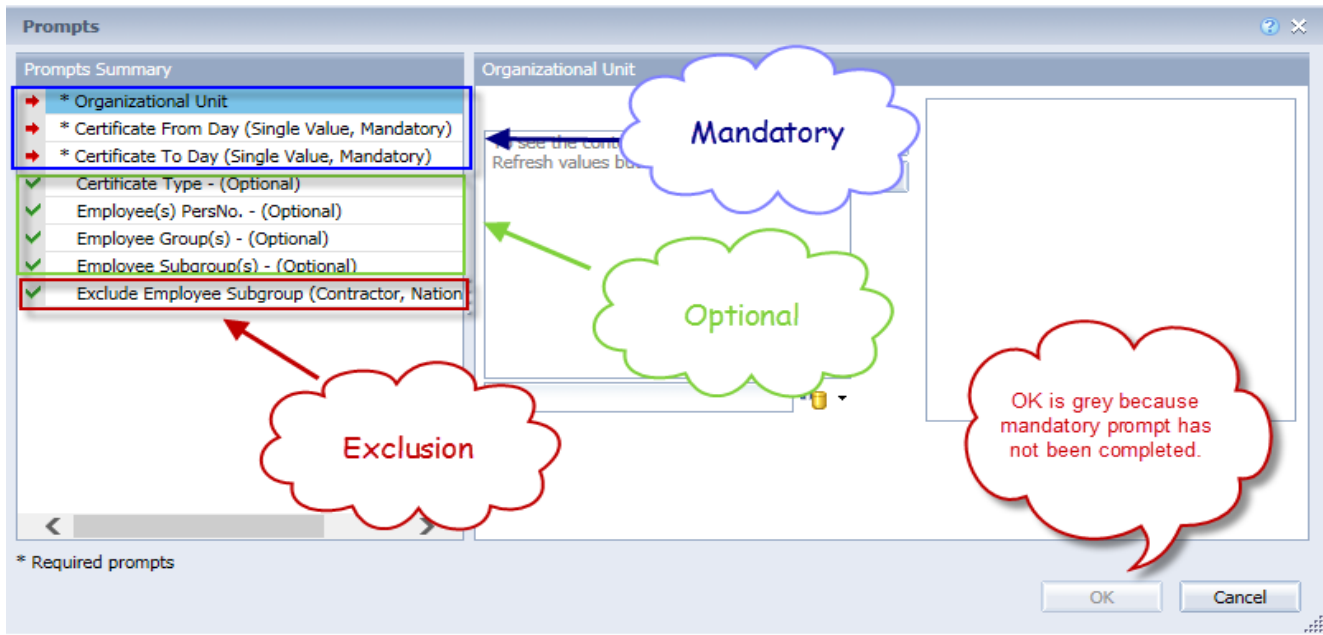
How to run this report

This report has three mandatory prompts, four optional prompts and one exclusion prompt
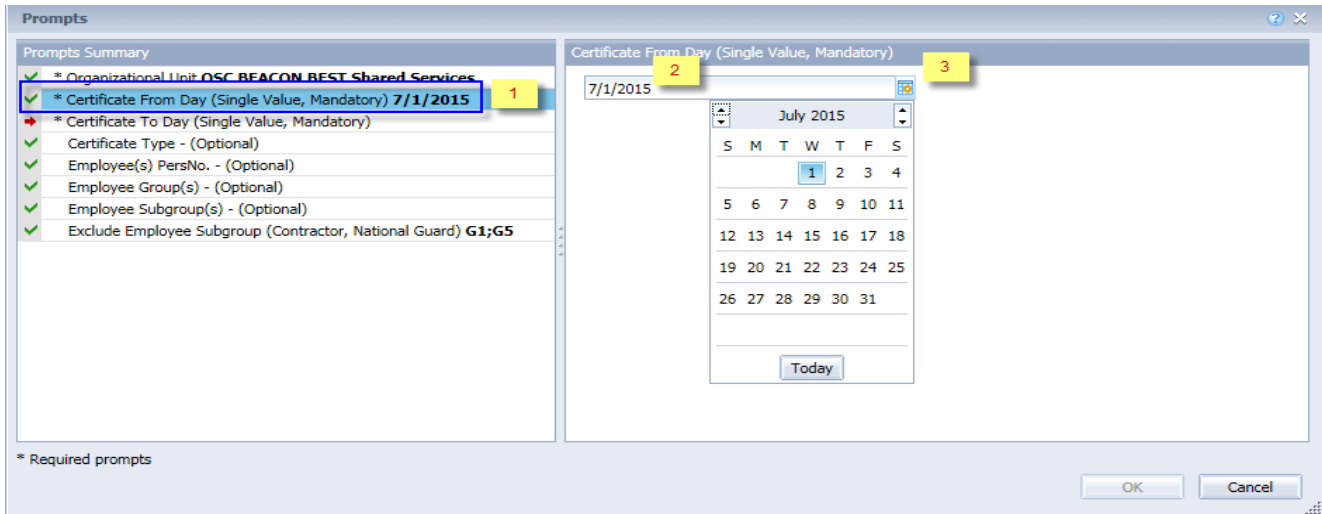

Mandatory Prompts

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 the "Refresh Values" icon to see the list of Org Units (2).
- Navigate down to the desired Org Unit (3).
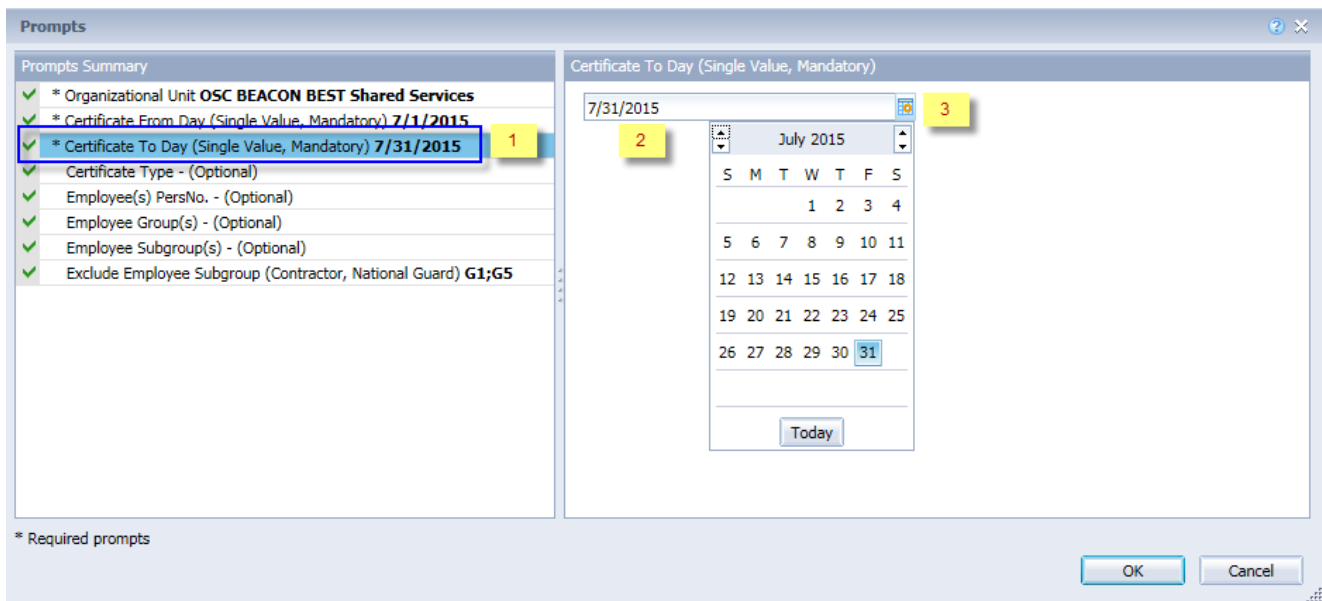- Click the right arrow to add it to the selection box (4).
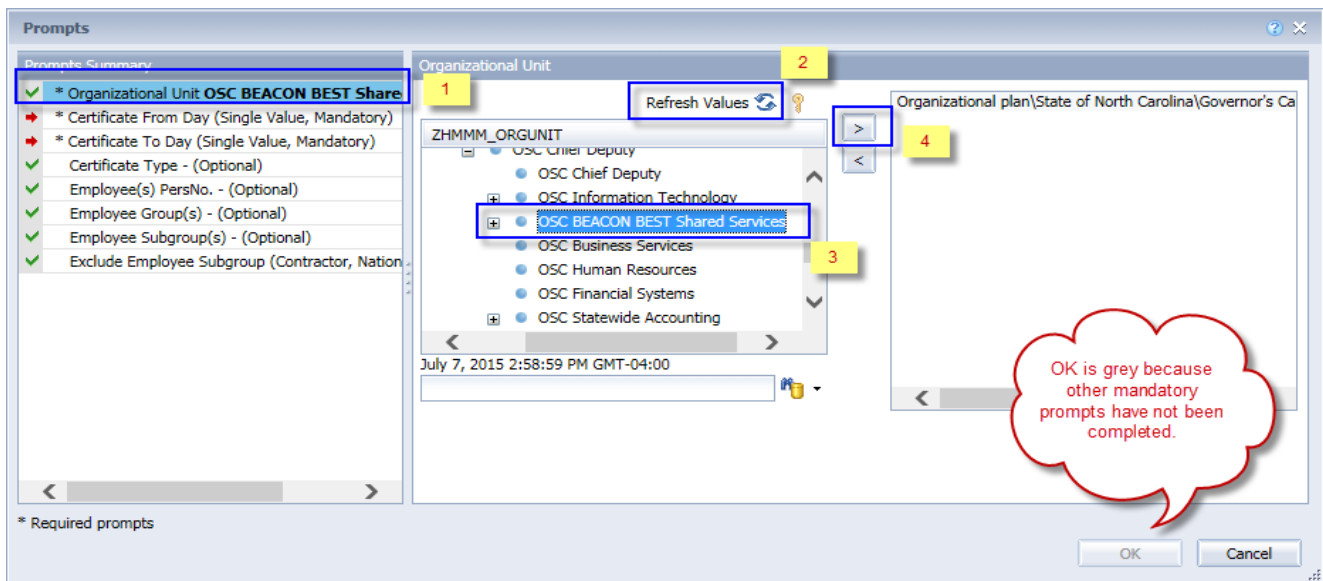
➔ **Certificate From Day (Single Value, Mandatory):** To select data for this prompt
  - Make sure the "Certificate From Day (Single Value, Mandatory)" prompt is selected (1).
  - Type the date using the format 'mm/dd/yyyy' (2).
  - **OR**, click the calendar icon to select the date (3).

➔ **Certificate To Day (Single Value, Mandatory):** To select data for this prompt
  - Make sure the "Certificate To Day (Single Value, Mandatory)" prompt is selected (1).
  - Type the date using the 'mm/dd/yyyy' format (2).
  - **OR**, click the calendar icon to select the date (3).
  - If no other prompts are required, click the "OK" button to run the report.
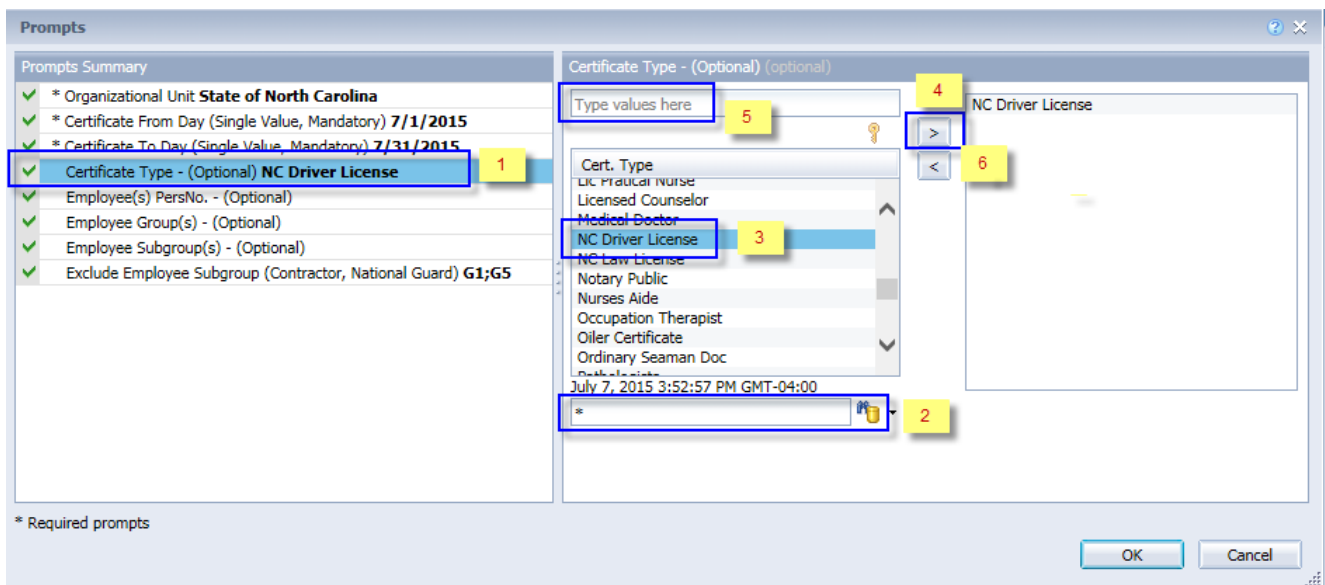
Optional Prompts:

Optional prompts are indicated with a green check mark (✓) but are not pre-filled or required. They are used to assist with limiting the amount of data that is retrieved into the body of the report. The optional prompts on this report are:

✓ **Certificate Type(s) - (Optional):** To select data for this prompt
  - Make sure the "Certificate Type - (Optional)" prompt is selected (1).
  - In the search box, narrow down the Certificate Type selection by using the wildcard * format and press the enter key (2).
  - Navigate down to the desired Certificate Type (3).
  - Click the right arrow to add it to the selection box (4).
  - **OR**, if you know the Certificate Type key or Certificate Type name, you can skip steps 2 through 4 and enter it directly in (5).
  - Click the ">" icon (6) to add it to the selection box.

✓ **Employee(s) PersNo. – (Optional)**: To select data for this prompt,
- Make sure the "Employee(s) PersNo. – (Optional)" prompt is selected (1).
- Enter the employee number in the search box (2).
- Click the binoculars search icon (3).
- Click the key symbol to display the employee number with the name (4).
- Select the employee entry (5).
- **OR**, if you know the Employee PersNo, you can skip steps 2 through 5 and enter it directly in (6)
- Click the right arrow to add the employee to the selection box (7).

📁 *Note: This prompt is in sync with the mandatory prompt Organizational Unit and will show only the Employees for the given Organizational Unit in the mandatory prompt.*

Important! The search feature is supported on this prompt [(2) and (3)], however, when the search option is used, the report attempts to retrieve all employee numbers from the OrgUnit given.

✓ **Employee Group(s) - (Optional):** To select data for this prompt
- Make sure the "Employee Group(s) - (Optional)" prompt is selected (1).
- In the search box narrow down the Employee Group selection by using the wildcard * format and press the enter key (2).
- Navigate down to the desired Employee Group (3).
- Click the right arrow to add the "Employee Group" to the selection box (4).
- **OR**, if you know the Employee Group key or Employee Group name, you can skip steps 2 through 4 and enter it directly in (5),
- Click the ">" icon (6) to add to the selection box.
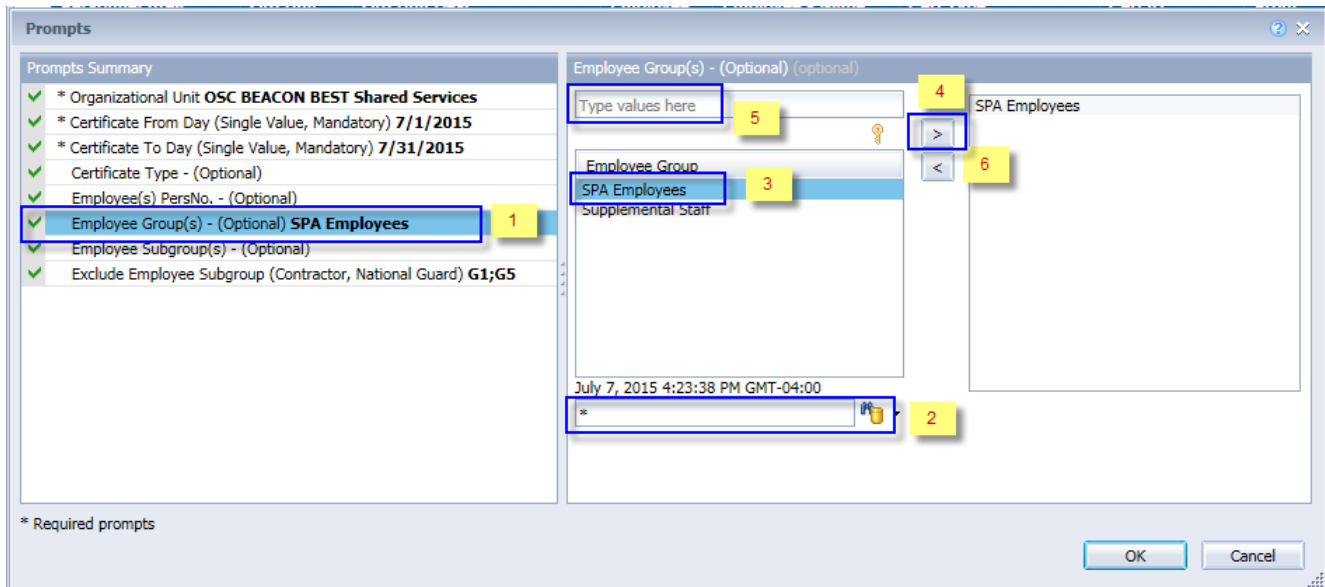
✓ **Employee Subgroup(s) - (Optional):** To select data for this prompt
  - Make sure the "Employee Subgroup(s) - (Optional)" prompt is selected (1).
  - In the search box, narrow down the Employee Subgroup selection by using the wildcard * format and press the enter key (2).
  - Navigate down to the desired Employee Subgroup (3).
  - Click on the right arrow to add to "Employee Subgroup" to the selection box (4),
  - **OR**, if you know the Employee Subgroup key or Employee Subgroup name, you can skip steps 2 through 4 and enter it directly in (5).
 - Click on the ">" icon (6) to select.
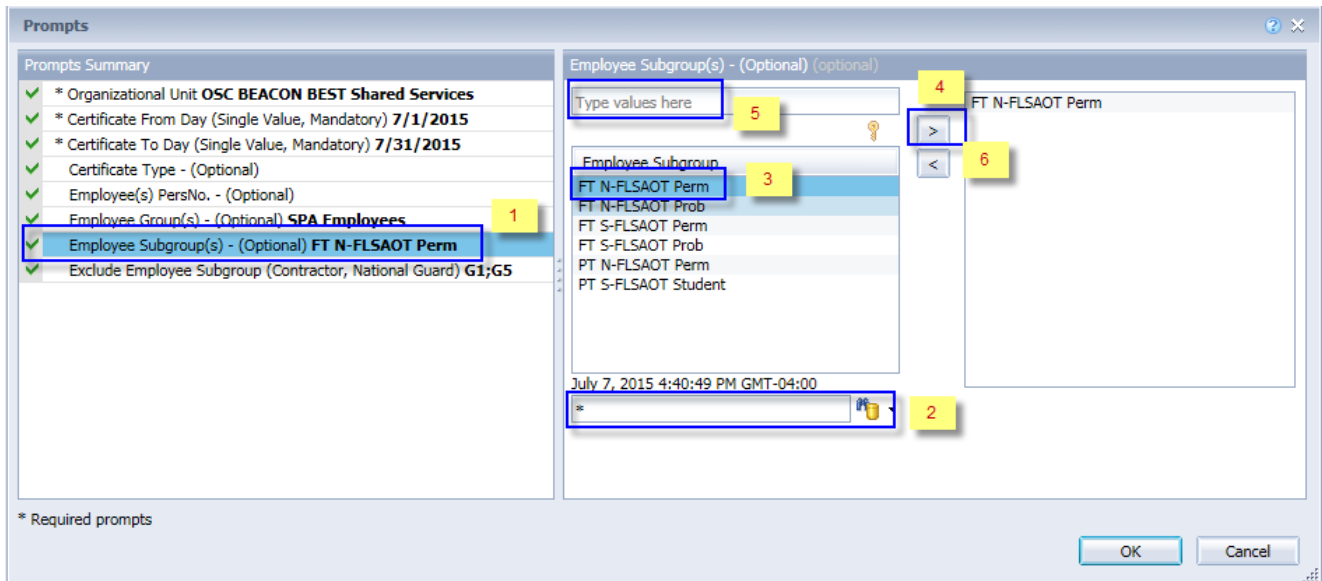
🗁 *Note:* Please select an Employee Subgroup relevant to the Employee Group selected. Otherwise report will show no result.

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 as a way 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, National Guard) G1; G5**: To remove this exclusion
    - Make sure the "Exclude Employee Subgroup" prompt is selected (1).
    - Click G1 and/or G5 in the selection box (2).
    - Click the left arrow (3) to remove from the selection box.
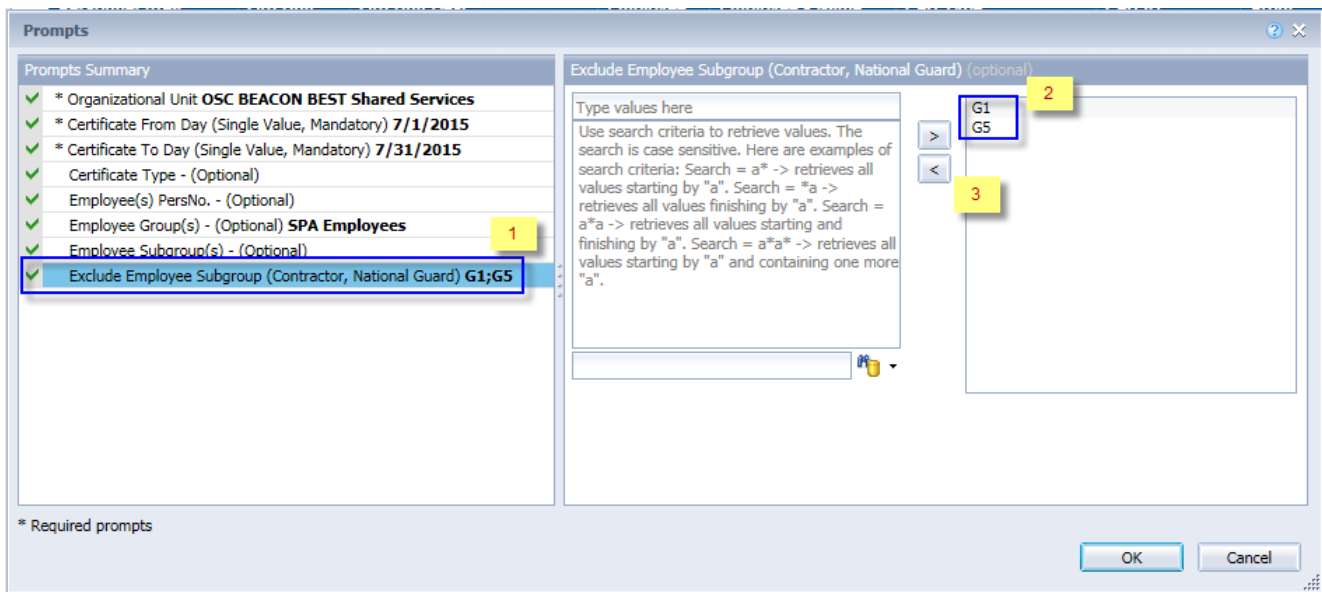
👉 *If you want Contractors to be included in the report, then click on the left arrow to clear G1 from the prompt and run.*

Initial Layout:

The report is generated with a list of Organizational No. of Employees by Employee Subgroup for each month. This is a sample of the report:

B0039: Employee Licenses, Certifications & Registrations — Execution Date:7/7/15

From 7/1/2015 To 7/31/2015

Personnel Area	Org Unit	Org Unit Desc	Employee	Employee's Name	Cert Type	Cert ID	Cert. Effective From	Cert. Effective To	Issuing Authority	Number of Records	License Expired
Transportation	20001845	DOT PAM/PD SH D1 M 2 NORTHHAMPTON CME			CommericalDriver Lic		10/5/07	7/17/15	NC DMV	1	
Transportation	20002081	DOT PAM/PD SH D7 M 1 ALAMANCE CME			CommericalDriver Lic		7/13/07	7/13/15	NC DMV	1	
Transportation	20002092	DOT PAM/PD SH D7 M 3 ROCKINGHAM CME			CommericalDriver Lic		7/17/07	7/26/15	NC DMV	1	
Transportation	20002133	DOT PAM/PD SH D8 M 3 SCME SCOTLAND			CommericalDriver Lic		7/31/07	7/31/15	NC DMV	1	
Transportation	20002136	DOT PAM/PD SH D8 OPS TRAFFIC			CommericalDriver Lic		5/4/07	7/8/15	NC DMV	1	
Transportation	20002141	DOT PAM/PD SH D8 CONSTRUCTION			NC Driver License		7/8/10	7/18/15	NC DMV	1	
Transportation	20002151	DOT PAM/PD SH D9 M DAVIDSON CME			CommericalDriver Lic		6/26/07	7/28/15	NC DMV	1	
Transportation	20002313	DOT PAM/PD SH D13 M 2 BCME BUNCOMBE			CommericalDriver Lic		5/4/07	7/3/15	NC DMV	1	Y
Transportation	20002433	DOT PAM/PD SH D5 D OPS EQ WARRENTON			CommericalDriver Lic		7/11/07	7/28/15	NC DMV	1	
Transportation	20002440	DOT PAM/PD SH D6 M EQ LUMBERTON			CommericalDriver Lic		2/26/07	7/3/15	NC DMV	1	Y

Available Objects:

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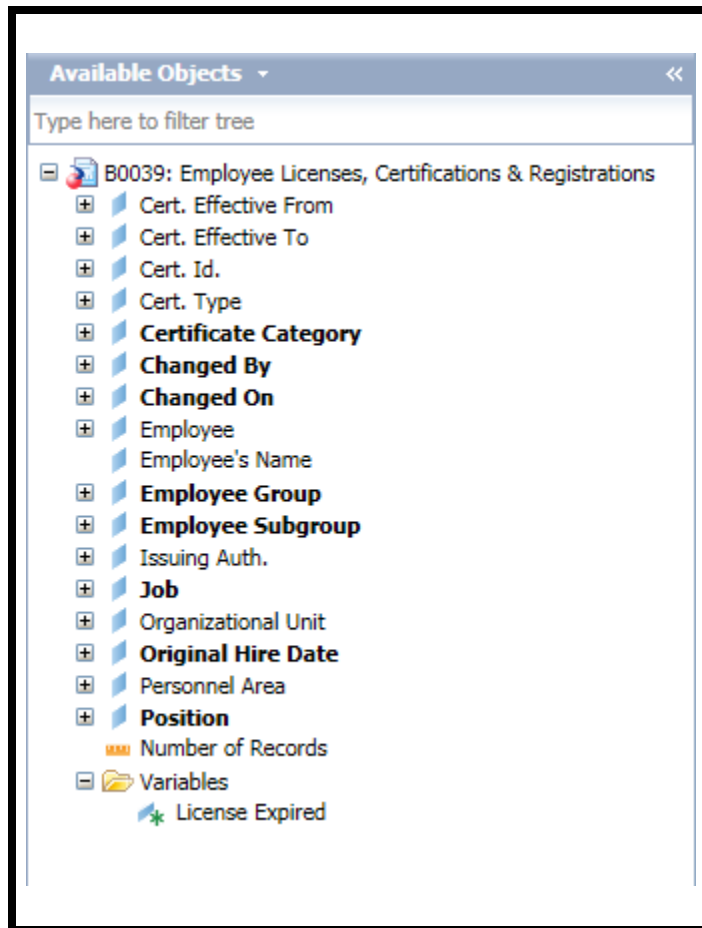
Special Report Considerations/Features:

- License Expired is determined based on the condition that if the 'Certificate Effective To' date is prior to system current date.

- Employee Subgroup G1 – Contractors and G5 – National Guards are excluded from the report. Refer the Exclusion Prompt "Exclude Employee SubGroup (Contractors, National Guard) G1; G5" for details.

- Employment Status - Active. Report runs for Active Employees only.

- Report displays a record only for Certificate Types assigned to an Employee License, Certification or Registration. Records with no Certificate Types assigned are not displayed.