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.

How to run 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 (✓) and 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 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 you do not need to verify the employee number, then you can skip steps 2 through 6 and enter it directly in (7).
  - Click on the right arrow to add the Employee to the selection box (8).

**NOTE:** Since we have a large number of 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:
  - Mickey*Mouse*
  - *Mouse

If you know the employee number, it is best to use the manual entry field (in step 7) to enter your selection.
**B0037: Employee Personal Data**

**Business Objects Web Intelligence**

- **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 on the search icon (3).
  - Click on the desired Employee County (4).
  - OR if you know the Employee County name already, then you can skip steps 2 through 4 and enter it directly in (5); must enter name in CAPs.
  - Click on 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).
- Click on "Permanent residence" in the right box to select (2).
- Click on 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 on the search icon (3).
- To see the key value for each Address Type, click on the key icon (4).
- Click on the desired Address Type (5).
- OR if you know the Address Type key or Address Type name already, then you can skip steps 2 through 5 and enter it directly in (6).
- Click on the right arrow to add the Address Type to the selection box (7).
**Employment Status(es) - (Optional):** To select data for this prompt

- Make sure the Employment Status(es) - (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 on the key icon (4).
- Click on the desired Employment Status (5).
- OR if you know the Employment Status key or Employment Status name already, then you can skip steps 2 through 5 and enter it directly in (6).
- Click on 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 on the key icon (4).
- Click on the desired Job (5).
- OR if you know the Job key or Job name already, then you can 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).
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 (Contractor) G1
To remove this exclusion
- Make sure the Exclude Employee Subgroup (Contractor) prompt is selected (1).
- Click on the G1 value in the right box to select (2).
- Click on the left arrow icon to remove the G1 exclusion (3).
Default 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.

<table>
<thead>
<tr>
<th>Employee's Name</th>
<th>Employee</th>
<th>Address Type</th>
<th>Address Line 1</th>
<th>Contact Name</th>
<th>Address Line 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTION, DYNA</td>
<td>100</td>
<td>Permanent residence</td>
<td>1 way</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Continued…

<table>
<thead>
<tr>
<th>City</th>
<th>County</th>
<th>State</th>
<th>Postal Code</th>
<th>Telephone #</th>
<th>Address Change Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raleigh</td>
<td>NC</td>
<td>27609</td>
<td>#</td>
<td>4/21/08</td>
<td></td>
</tr>
</tbody>
</table>
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.