

Personnel Planning Information

The Personnel Fiscal Planning Report in PWIORPT is designed to assist in personnel budgeting by gathering payroll and job detail information for unclassified and classified employees. All employees with Banner query access can run this report.

Report Data Elements:

Job Type	TS Org	Status	Rank	Rank Desc	Tenure
Annual Basis	ID	Name	Position	Suffix	Job Title
Begin Date	End Date	Base Rate	Uncls Eff Date	Appt Pct	Appt Salary
Assn Salary	Index	Fund	Orgn	Acct	Prog
Actv	LD%	Step	Grade	Merit Date	Adj Service Date

Retrieving Employee Data from Banner

1. In Banner, type in screen name PWIORPT.
2. From the “Report” drop-down menu select “*Personnel Fiscal Planning Report*”. Leave the output type as “Display/Print Report”
3. From the “Options” menu select “*Run Report*”.
 - A new browser window will appear. If prompted, enter user name and password and SUBMIT.
 - Type in the organization code for which you wish to retrieve the information. You can search on a data enterable or roll-up org as high as your Level 3 Org Code. If you have employees on different labor distribution orgs, you can use a higher-level org to get all of the employees paid on any of the orgs under it.
 - You may leave the start and end dates defaulted to the current year, or look at other year’s actuals by changing the dates.
 - When all your choices are entered, click on “Submit Query”.
4. When the report data appears select “Save”. Select an appropriate location on your computer for doing your personnel work. Name the file Personnel Data and save it to your computer as an Excel file.
5. You will need to exit the browser window and open the document you just created in Excel. You can now manipulate the information as you would any other Excel document.

Personnel from Student Affairs have developed a macro that allows you to reorganize your personnel data for use with the OPE Worksheets and the Classified Planning Worksheet. If you would like to utilize either of these sheets, the macro might be a useful tool. Alternatively, you may sort and group the personnel data yourself, in which case you could skip steps 1-4 below and proceed directly to the OPE and Classified Planning Worksheets.

Note: the following macro was created using Excel 2003. If you are running an older version of Excel, you may have problems with the macro's functionality.

1. From the BRP website, open up the Personnel Planning Macro file from the BRP website: http://brp/beginning_budget. You will get a security warning. Click ENABLE MACROS. The file will open up to what is apparently a blank worksheet.

If you do not get a security warning you'll need to adjust the macro security level of your computer. Under the Tools/Macros menu, choose Security. When the security dialog box appears, select Medium, click okay and then SAVE the Personnel Planning Macro file. Close and then re-open the file.

2. Minimize, but do not close the Personnel Planning Macro file. The file works in the background and must be open to work.
3. Open the Personnel Data file. You may wish to make a back-up copy of this file, for once the macro has run the file will be permanently changed. Look over the data carefully and make sure that all employees you wish to retain data on have a **Status** (column C) of "A". The macro will remove all employees with a status of "T". You may also wish to SORT on employee name and annual basis.

If you intend to use the data with the OPE worksheets, you should note the unclassified jobs that are Stipends (only variable OPE is charged) or employees who are working in post-retirement positions (no retirement is charged). Simply change the Status to "S" for stipend and "R" for retirement. You can then calculate the OPE separately for these jobs.

4. RUN the Macro
 - While holding down the **Alt** key, press the **F8** key.
 - A macro dialog box will appear, with two macros listed.
 - Select the "0708personnelplanningmacro" and press the **Run** key.
 - The report data will be reformatted and then six worksheets will be created: unclassified, IT, classified, OPE-unclassified, OPE-classified and OPE-IT.
 - The classified data is now formatted for use in the Classified Planning Worksheet.
 - IT employees, whose classifications do not have steps, have been copied to a separate sheet in the workbook. See Instructions for Budgeting for IT Employees below.
 - Unclassified employee data has been formatted for use in budget planning.
 - The three OPE tabs have data now formatted for use with the OPE worksheets (i.e., all duplicate entries created by labor distributions have been removed).

You may now use the data with the Classified Planning Worksheet, or the OPE Worksheets.

See the Word document: "Using Personnel Data with Budgeting Worksheets" on BRP's **OPE and Personnel Planning** website (or in the Employee Information area of Beginning Budget).