

B0201 Quota Balances with Estimated Cost

Purpose

The purpose of this report description is to explain how to generate the Quota Balances with Estimated Cost report.

Report Description

This report displays the ending quota balances for one or more employees on a specified day within the current or three prior months. It also displays a cost estimate for each quota based on a calculated hourly rate.

Report Location

PT: Leave Quotas

Report Uses

Agencies use this report to project expected payouts for employees who are retiring or separating for other reasons.

How to Generate This Report

This report is generated after selecting values for the mandatory prompts. All mandatory prompts must have values selected before the Run Icon can be used to generate the report. Mandatory prompts can be identified as mandatory by the exclamation mark inside of the yellow-orange triangle, the square with the checkmark, or the display of (Mandatory). Detailed instructions for interaction with each prompt can be found on the [Web Intelligence Prompt List](#) on the [OSC website](#).

The Mandatory prompts for this report are:

- Organizational Unit
- Calendar Day (Single Value, Mandatory)

This report can also be further limited by utilizing the Optional prompts to further limiting the amount of data that retrieved into the body of the report. Optional prompts are indicated as optional in parentheses beside the prompt.

The Optional prompts are:

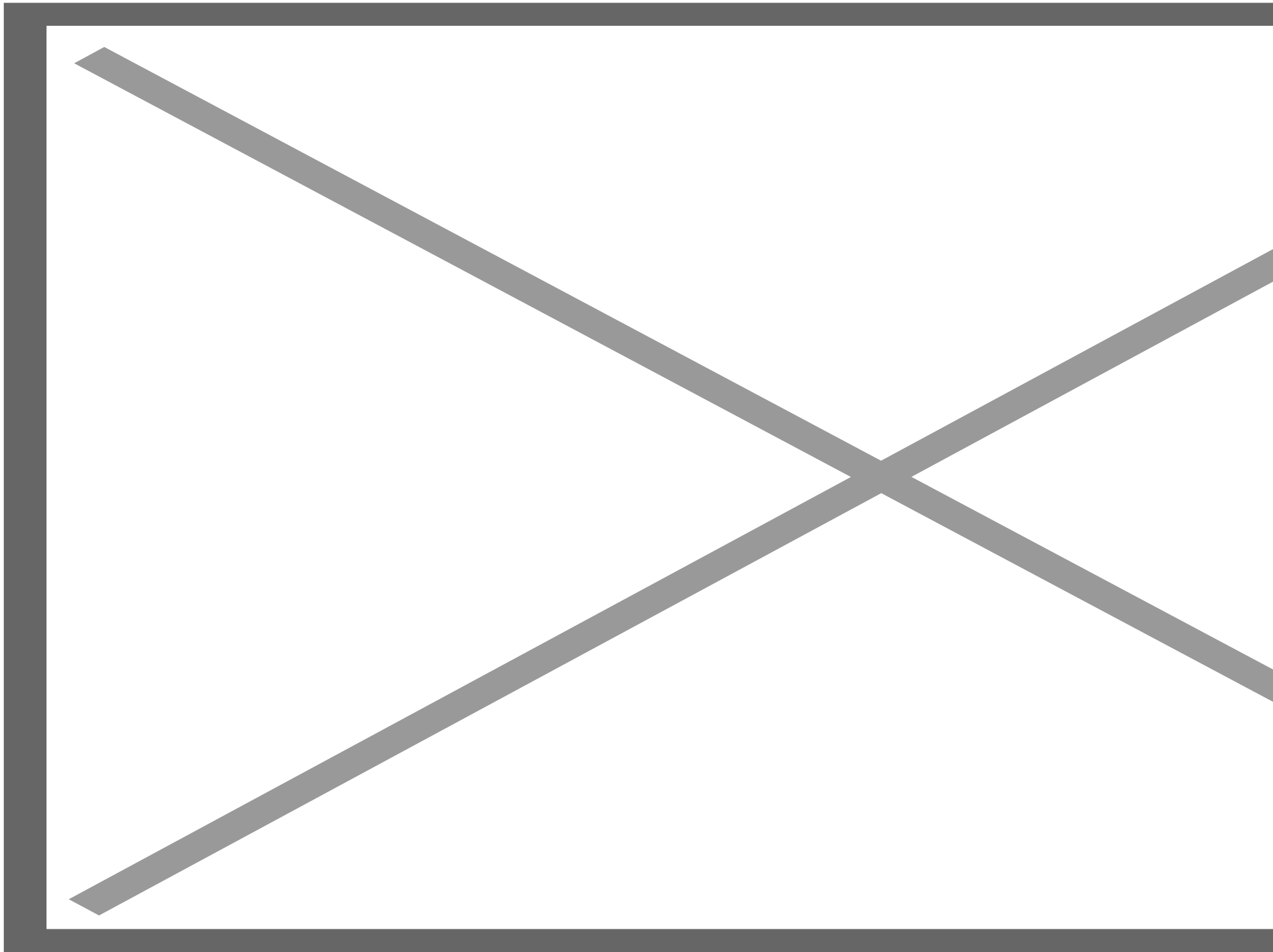
- Employee(s) PersNo. - (Optional)

Exclusion prompts exclude specified data by default while allowing customers the flexibility of changing them when necessary. Exclusion prompts are identified by the term Exclude followed by the prompt.

The Exclusion prompts are:

- Exclude Employee Subgroup (Contractors)

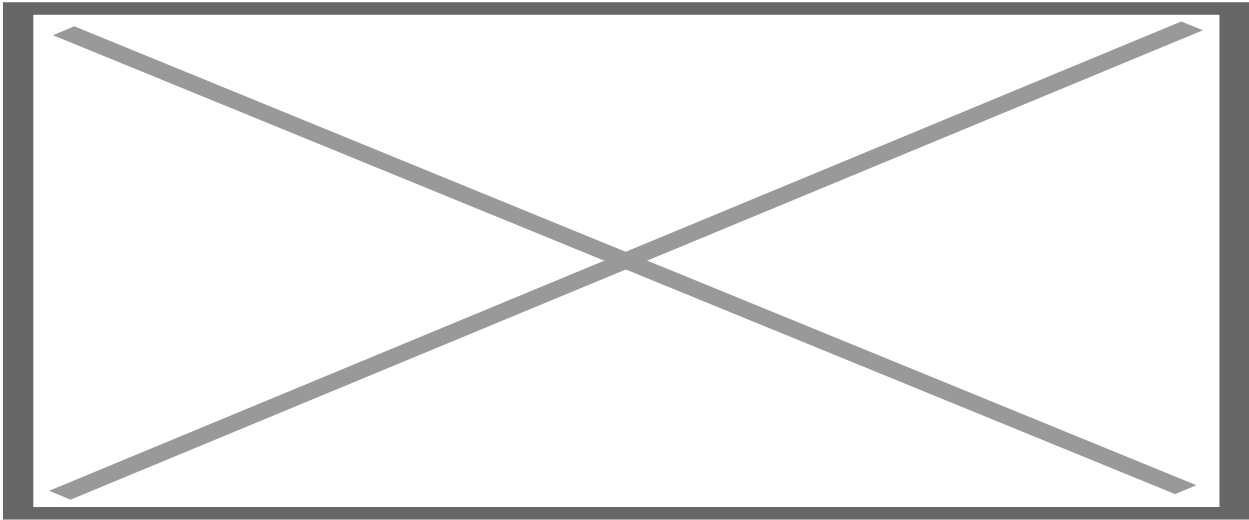
Image



Initial Layout

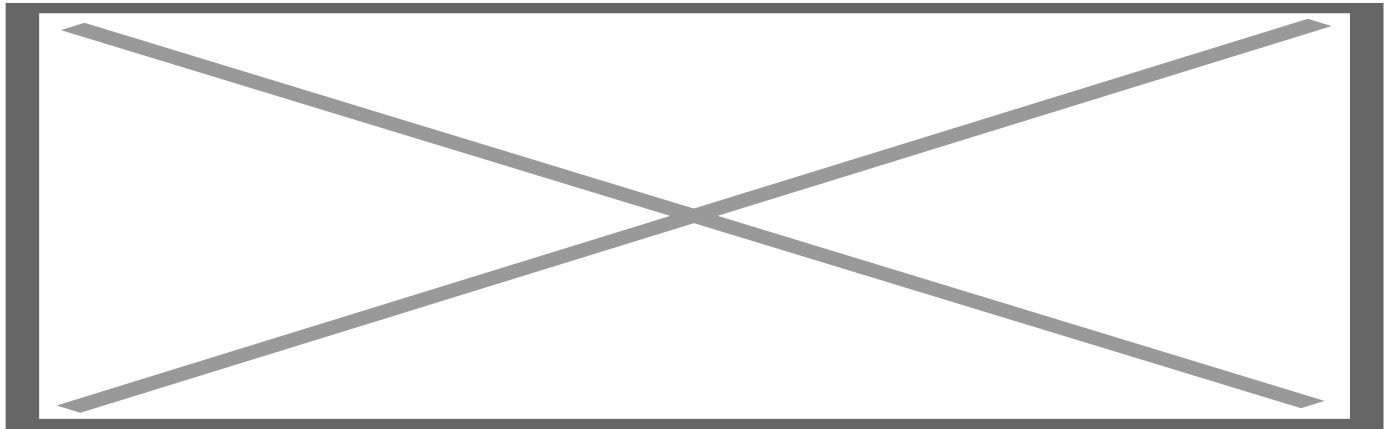
The report lists quota balances and estimated cost for each employee as of the date selected. Below is a sample rendering.

Image



Continued...

Image



Available Objects

This is a list of the available objects that can be added to the report, from the Document Dictionary once in the Design mode.

Dimensions

- Age Range
- Cal Mth/Yr
- EE Hrly Rate
- EE Hrs Per Wk
- Employee
- Employee Group
- Employee Name
- Employee Subgroup
- Employment Status
- Job
- Mths of Svc
- Organizational Unit
- Personnel Area
- Personnel Subarea
- Position
- Position County
- Quota/Att&Abs Type
- Supv Employee
- Supv Position
- Time Mgmt Status
- Time Type Group
- Work Schedule Rule
- Working Week

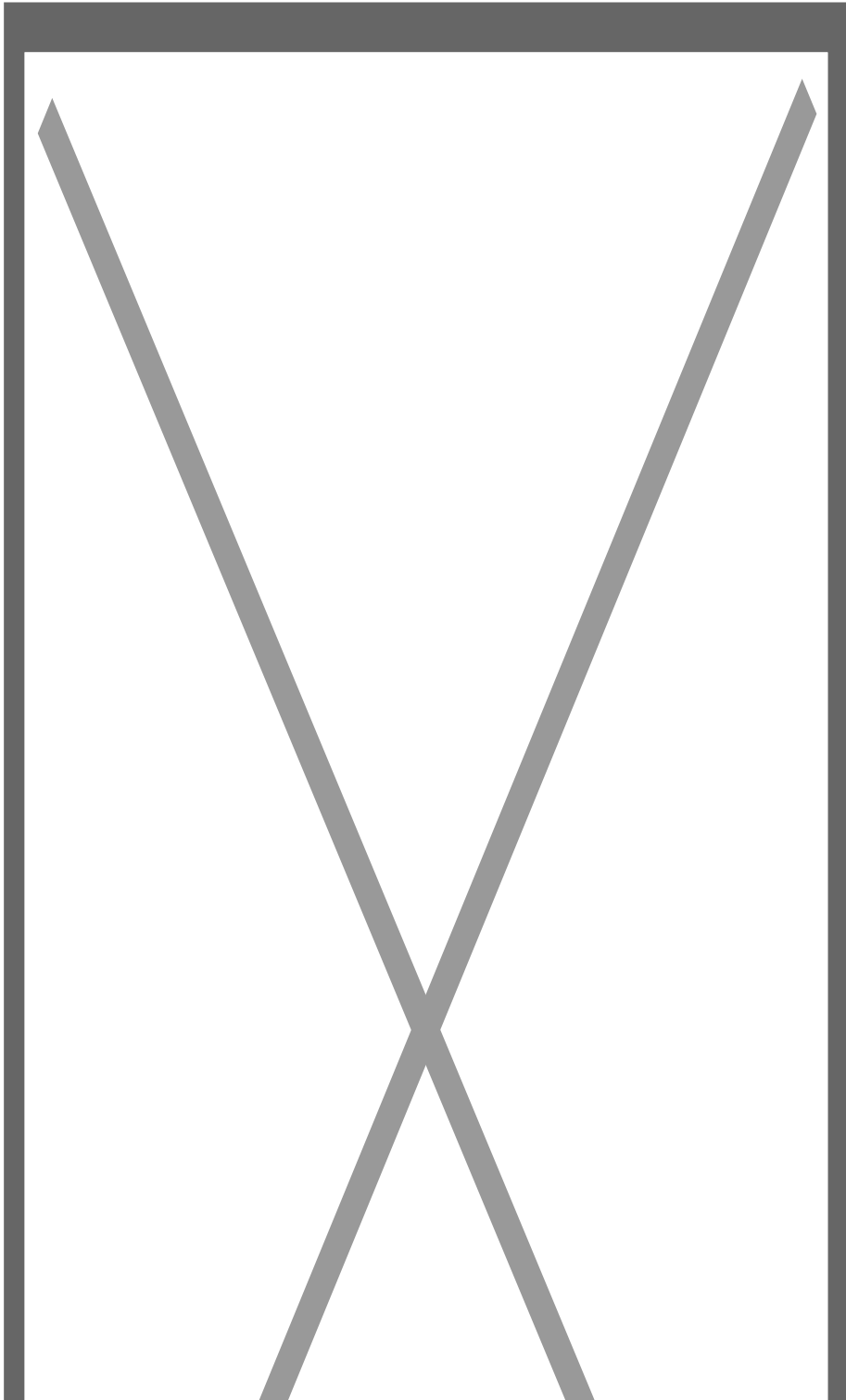
Measures

- Ending Balance
- Estimated Cost

Variables

- Prompt Response Calendar Day
- Prompt Response Employee PersNo
- Prompt Response Exclude Employee Subgroup
- Prompt Response Organizational Unit

Image



Special Report Considerations/Features

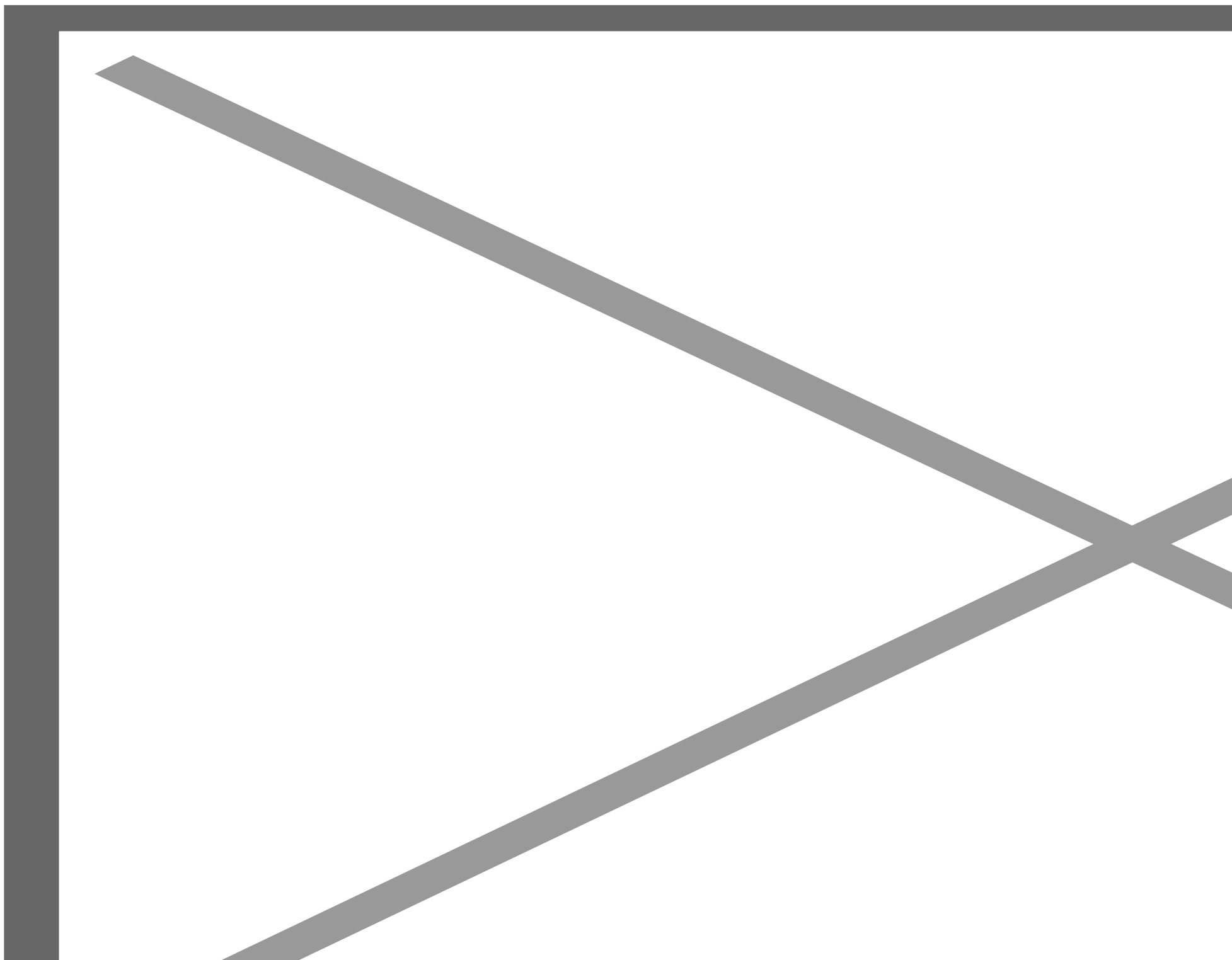
- Quota data in BI is extracted twice a week on Wednesdays and Saturdays, so the “Calendar Day” date prompt needs to include a date that falls on a Wednesday or Saturday.
- This report will include only data that is extracted for the previous 3 months up to the current date.
- Contractors are excluded by default on this report. This can be changed.
- There is a known issue with the precision in the quota balance hours when a position is split funded. For example, 40.00 hours may be presented as 40.02 hours. This is caused by a rounding issue when the hours are broken down by the split fund percentages.
- There is a default filter applied to the crosstab table to only show the following quotas:
 - 10: Vacation Leave
 - 15: Sick Leave
 - 20: Overtime Comp Time
 - 21: Gap Hrs Comp Time
 - 22: Holiday Comp Time
 - 30: PTO EHRA Personal Lv
 - 50: Bonus Leave
 - To modify this default filter to allow other quotas to be shown, please follow the steps below. There are 6 steps to complete this process.

Step 1: In Design Mode, click on any row in the report and click Show data/format panel icon.

Step 2: Click on the Filter Icon.

Step 3: Click on the ellipses next to “Quotas/Att&Abs” Type and click Manage filter button.

Image

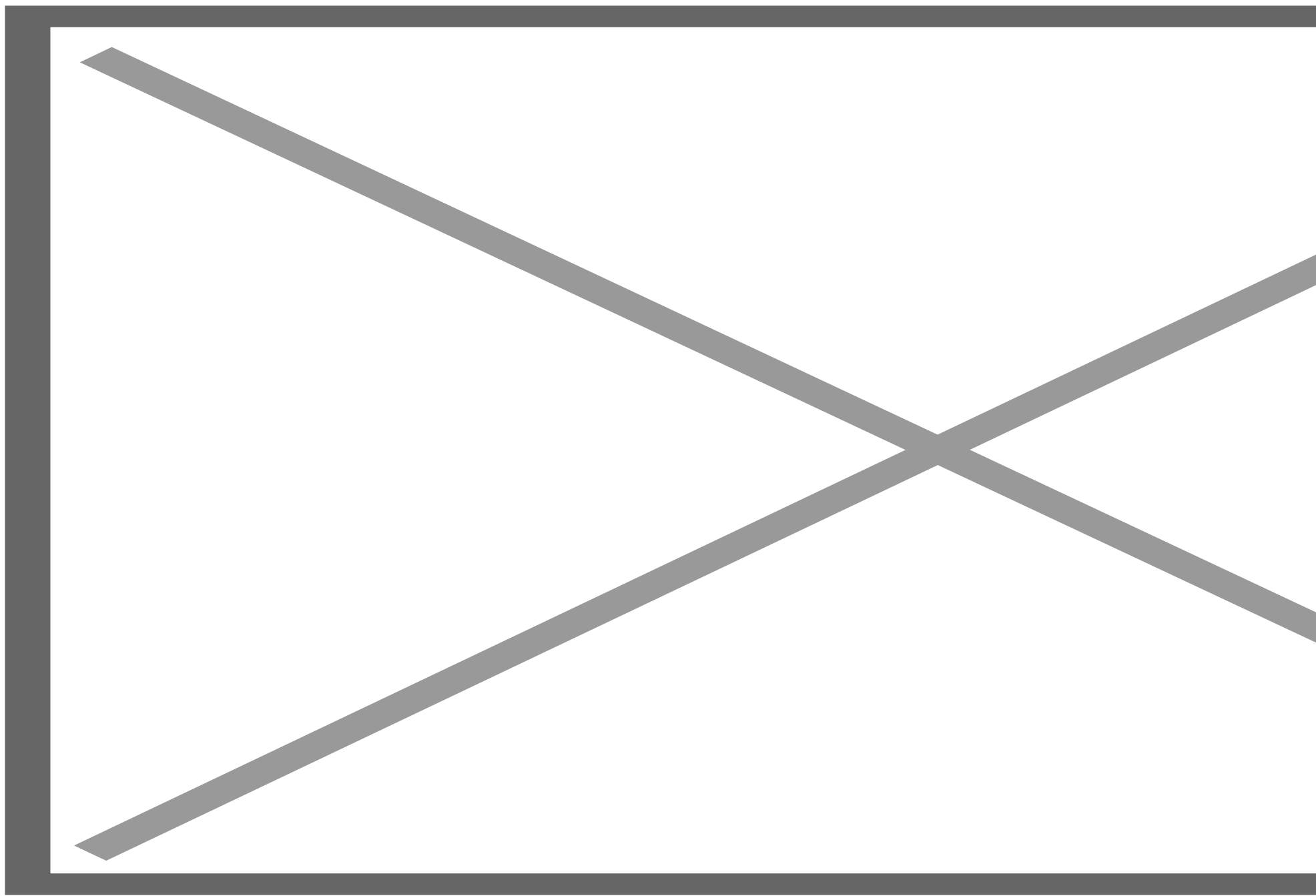


Step 4: When the Manage Filter pops up, click on any additional desired Quota/Att&Abs Type(s) boxes in the Available Values tab.

Step 5: A checkmark will appear, and the value selected will appear in the Selected Values tab on the right side.

Step 6: Click OK.

Image



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