



BOBJ REPORT DESCRIPTION

B0040 Employee Performance Rating & Salary

Report Description:

The B0040: Employee Performance Rating & Salary report provides a list of active employees within the organizational unit selected, along with each employee's performance rating and salary as of the end of the year cycle selected.

Report Location:

PA: Performance Ratings

Report uses:

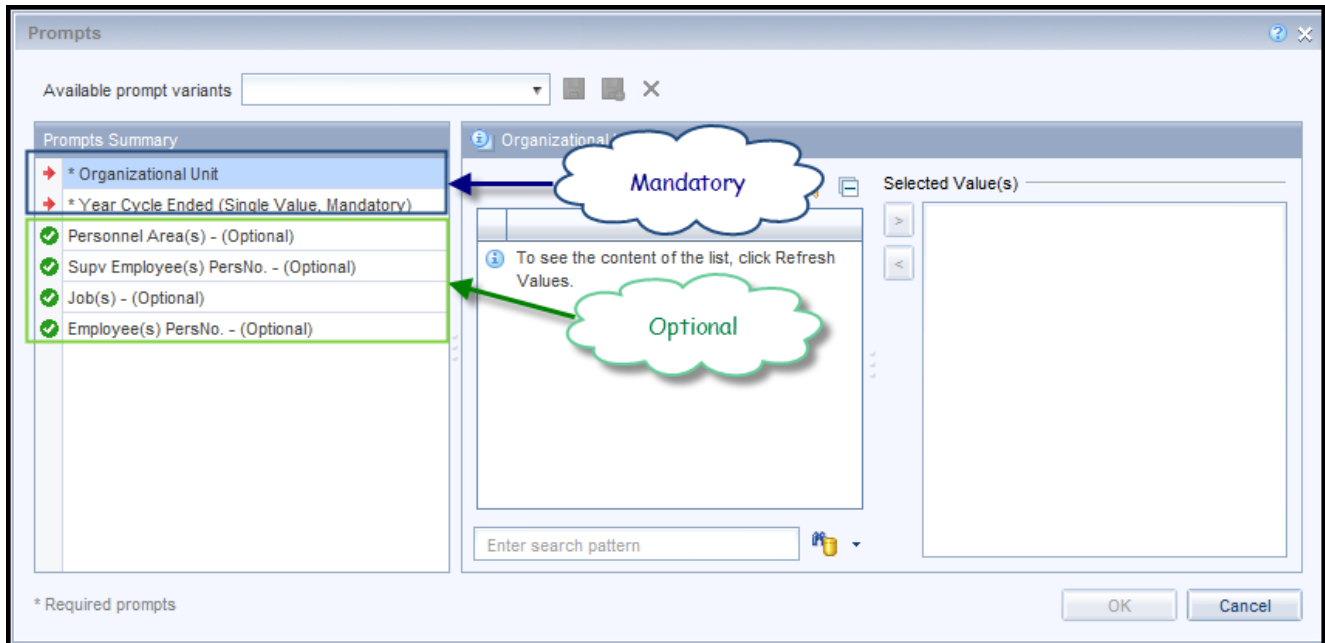
- This report can be used to obtain the list of performance ratings for the organizational unit specified to view the ratings have been entered for the employees within the organizational unit specified.
- This report can be used to determine if a supervisor has completed the ratings for the employees within his/her unit, or if there are missing entries for specific employees.

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How to run this report

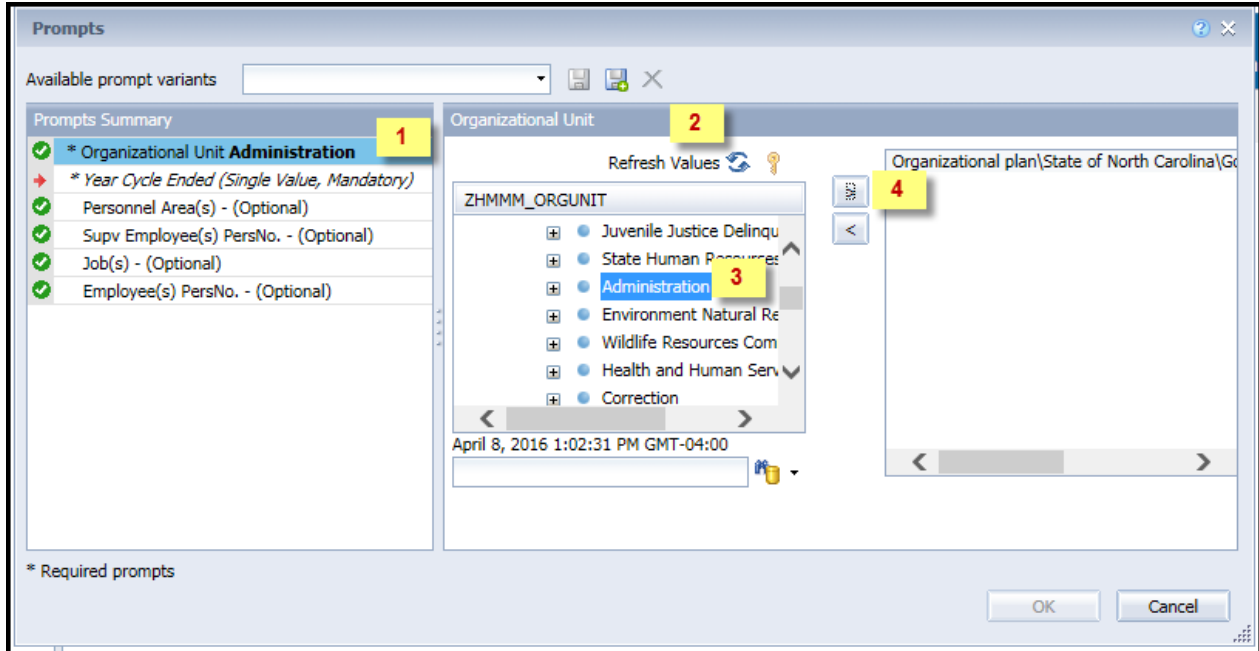
This report has two mandatory prompts and four optional prompts:



Mandatory Prompts

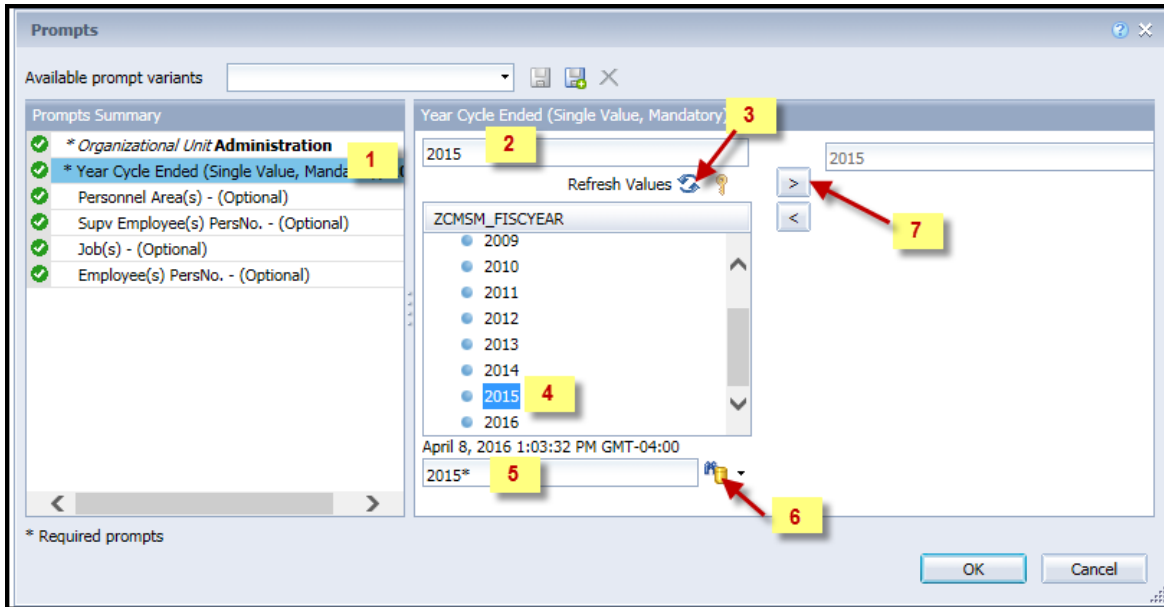
Mandatory prompts have a red arrow indicator (➔) followed by an asterisk (*) on the left side of the prompts. When a valid value(s) is entered, this indicator will turn into a green check mark (✓).

- ➔ ***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).



BOO40 EMPLOYEE PERFORMANCE RATING & SALARY

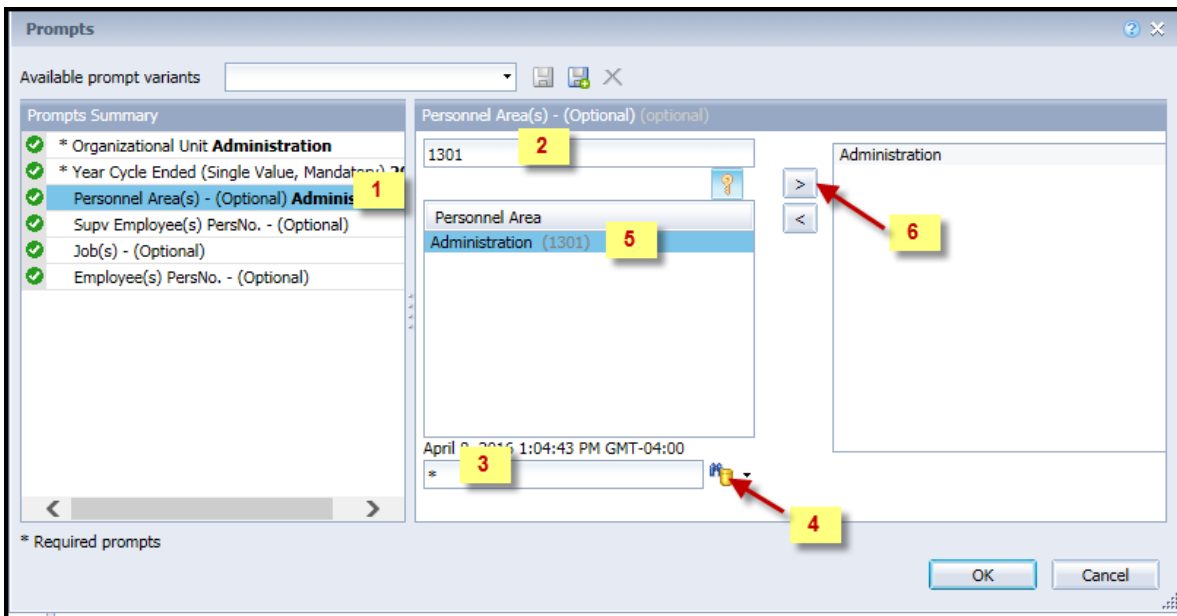
- ***Year Cycle Ended:** To select data for this prompt:
- Make sure the Year Cycle Ended prompt is selected (1).
 - Enter the four-digit year in CCYY order (2).
- OR
- Click the “Refresh Values” icon to see the list of years (3).
 - Highlight the year you want to select (4).
- OR
- Enter a year in the search box (5.)
 - Click the search icon (6).
- Click the right arrow to add it to the selection box (7).



Optional Prompts:

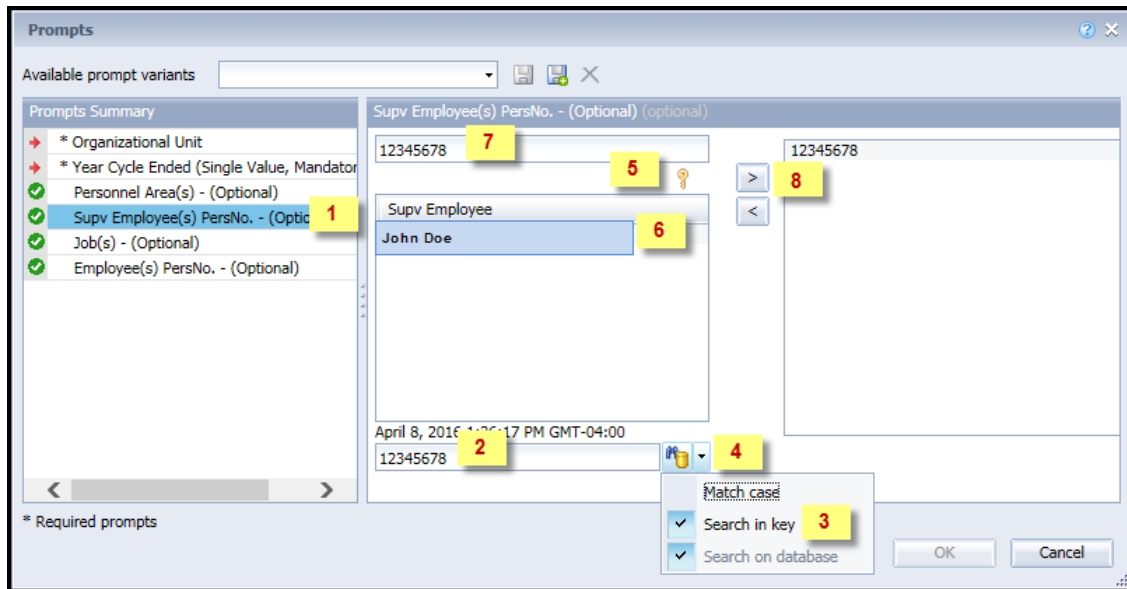
Optional prompts are indicated with a green check mark (✓) and are not required. Sometimes they are pre-filled with a default value. They are used to assist with limiting the amount of data that is retrieved into the body of the report.

- ✓ **Personnel Area(s) - (Optional):** To select data for this prompt:
 - Make sure the “Personnel Area(s) – (Optional)” prompt is selected (1).
 - If you know the personnel area, enter the 4 digit number (2).
 - OR
 - Enter an asterisk in the search box (3).
 - Click the search icon (4).
 - Highlight the personnel area you want to select (5).
 - Click the right arrow to add it to the selection box (6).



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- ✓ **Supv Employee(s) PersNo. - (Optional):** To select data for this prompt:
 - Make sure the “Supv Employee(s) PersNo. - (Optional)” prompt is selected (1).
 - Enter an employee number of the supervisor in the search box to verify the supervisor employee name (2).
 - Click the search icon drop-down arrow and select “Search in key” (3).
 - Click the search icon (4).
 - To see the supervisor employee number, click the key icon (5).
 - Select the desired Supv Employee (6).
 - **OR**, if you do not need to verify the supervisor’s employee number, you can skip steps 2 through 6 and enter it directly in (7).
 - Click the right arrow to add the Supv Employee to the selection box (8).



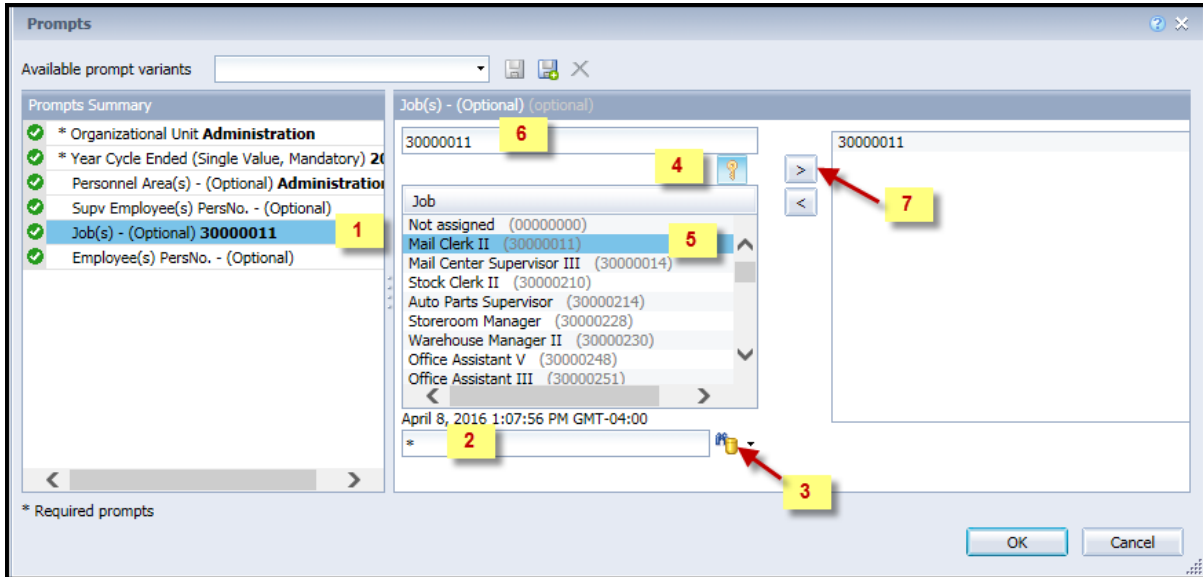
NOTE: Since we have a large number of employees in the system, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If you do not know the supervisor’s employee number and must do a name search, you can narrow down your search by using the wildcard with specific text strings when looking for a supervisor’s employee by name such as:

- Mickey*Mouse*
- *Mouse

If you know the supervisor’s employee number, it is best to use the manual entry field (in step 7) to enter your selection.

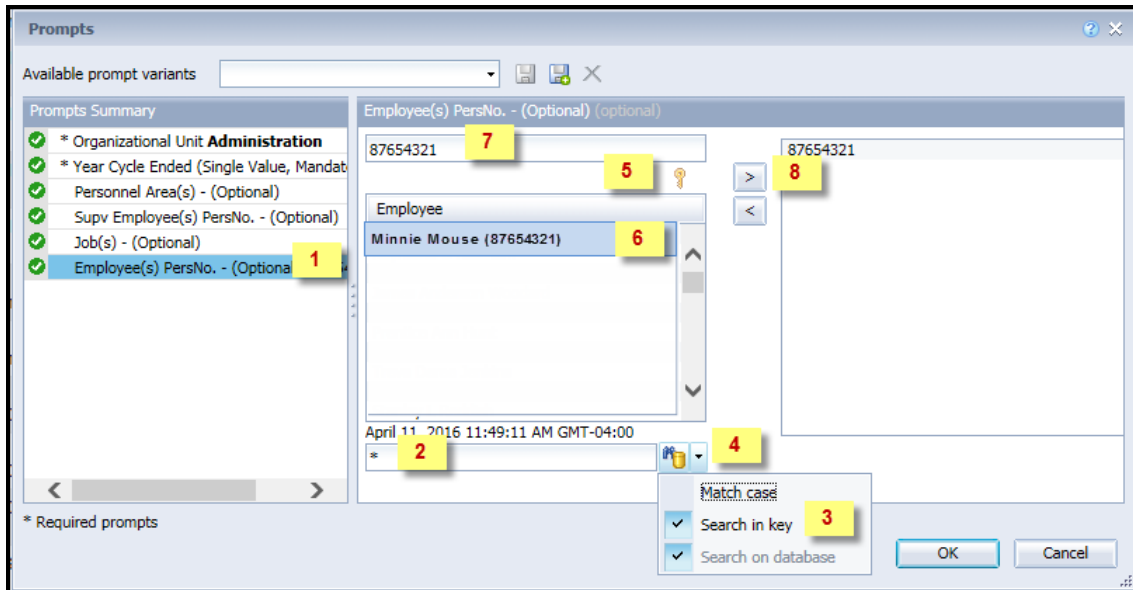
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- ✓ **Job(s) - (Optional):** To select data for this prompt
 - Make sure the “Job(s) - (Optional)” prompt is selected (1).
 - Enter a search text with an asterisk (*) in the search box to view the list of values for Job (2).
 - Click the search icon (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).



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- ✓ **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 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.

BO040 EMPLOYEE PERFORMANCE RATING & SALARY

Initial Layout:

The report is generated with a list of active employees who have a performance rating in the system for the organizational unit and fiscal year end selected. Below is a sample of the report:

| <u>BO040: Employee Performance Rating & Salary for FY Cycle 2015</u> | | | | |
|---|--------------------------|----------------|-----------------------------|---------------|
| Organizational Unit | Organizational Unit Desc | Personnel Area | Supv Position Desc | Supv Employee |
| 22222222 | ADMIN SO Administration | Administration | Secretary Of Administration | John Doe |

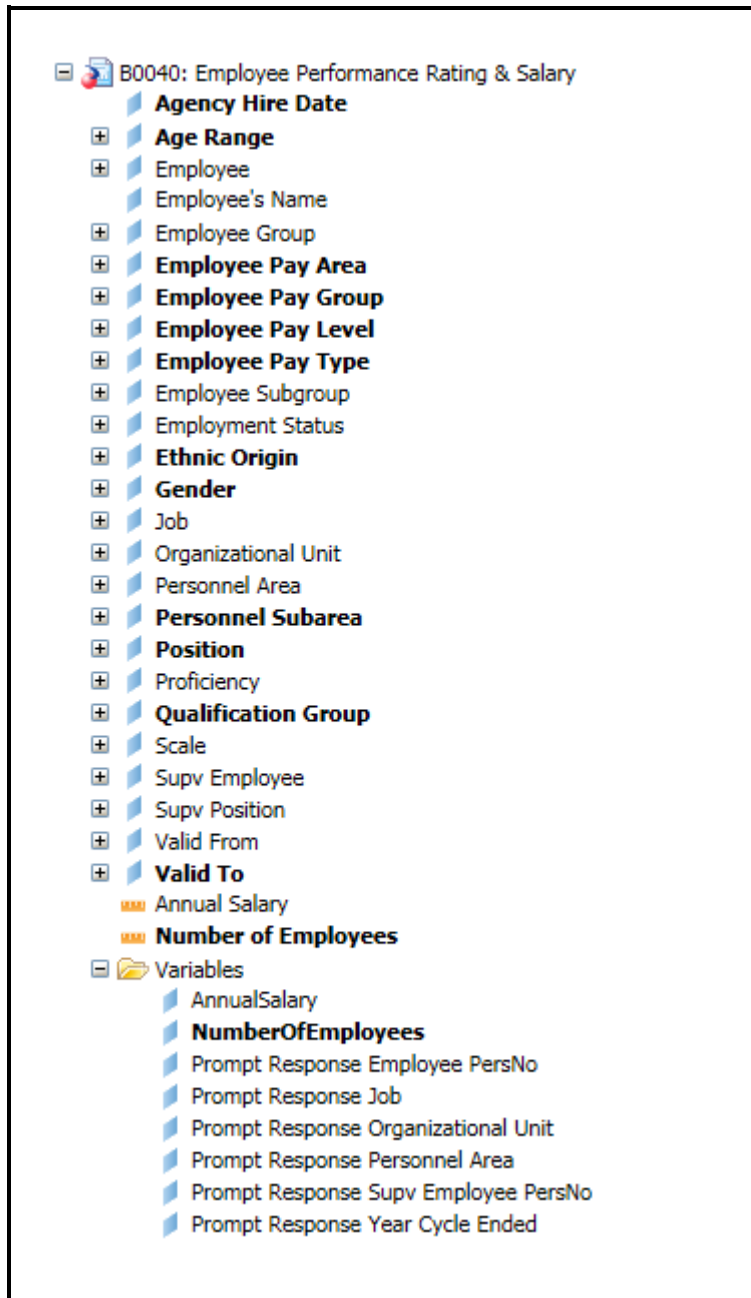
Continued...

| Employee | Employee's Name | Scale | Proficiency | Annual Salary | Valid From |
|----------|-----------------|-------------------------------------|-------------|---------------|------------|
| 87654321 | MOUSE, MINNIE | Performance Mgmt Summary Ratings | OUTSTANDING | 45,000 | 07/01/2014 |

BOO40 EMPLOYEE PERFORMANCE RATING & SALARY

Available Objects:

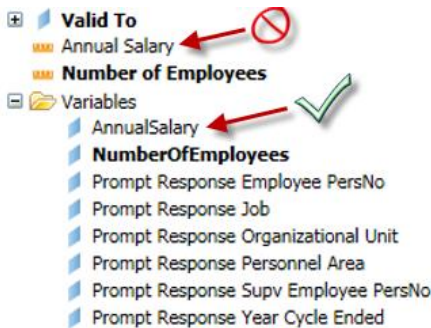
This is a list of the available objects that can be added to the report, once in Design mode:



BOO40 EMPLOYEE PERFORMANCE RATING & SALARY

Special Report Considerations/Features:

- The report defaults to generating list of all active employees who have a performance rating entered for the year selected.
- The data is refreshed daily, and is current as of the close of business from the previous business day.
- The annual salary on the base report is a variable named “AnnualSalary”. If you remove this variable from the report, and later decide that you need it, you will need to add the variable named “AnnualSalary” (shown with the check mark below). Do not use the measure named “Annual Salary”. If so, the report will return values of #UNAVAILABLE in that column due to filtering.

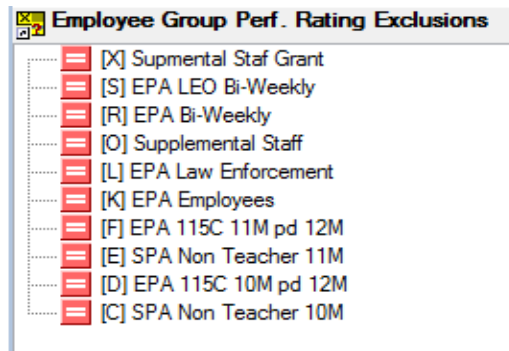


- This report contains filters that exclude specific jobs, employee groups and employee subgroups.
 - The following educational jobs are excluded from the report with a report filter:

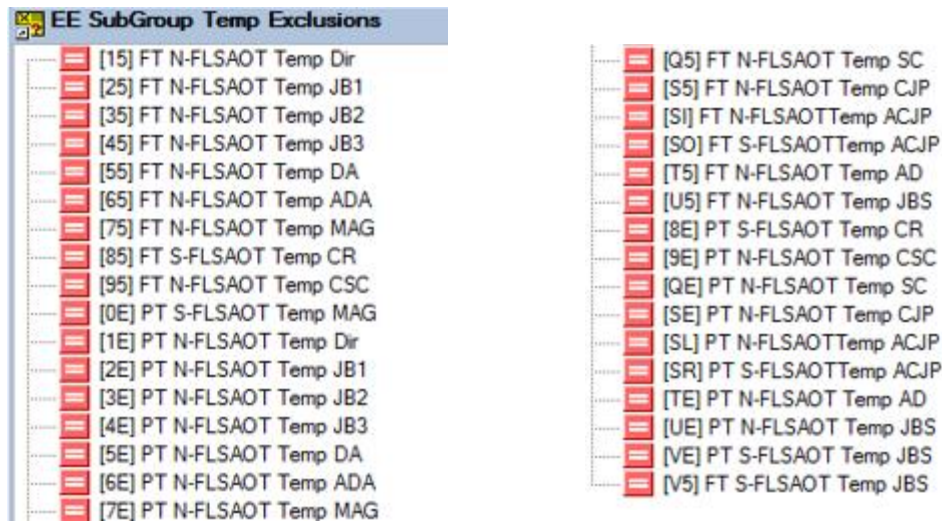
| Job Perf. Rating Exclusions | |
|-----------------------------|------------------------------------|
| [30002063] | School Educator-interim |
| [30002062] | School Educator-substitute |
| [30002055] | School Assistant Principal |
| [30002054] | School Administrator |
| [30002061] | School Educator-retired |
| [30001995] | School Vocational Educator |
| [30002044] | School Educator IV |
| [30002043] | School Educator III |
| [30001991] | School Educator II |
| [30001990] | School Educator I |
| [30002052] | School Speech-language Pathologist |
| [30002049] | School Psychologist |
| [30002046] | School Librarian |
| [30001970] | School Guidance Counselor |
| [30002053] | School Audiologist |
| [30002060] | School Principal |

BO040 EMPLOYEE PERFORMANCE RATING & SALARY

- The following Employee Groups are excluded from the report with a report filter:

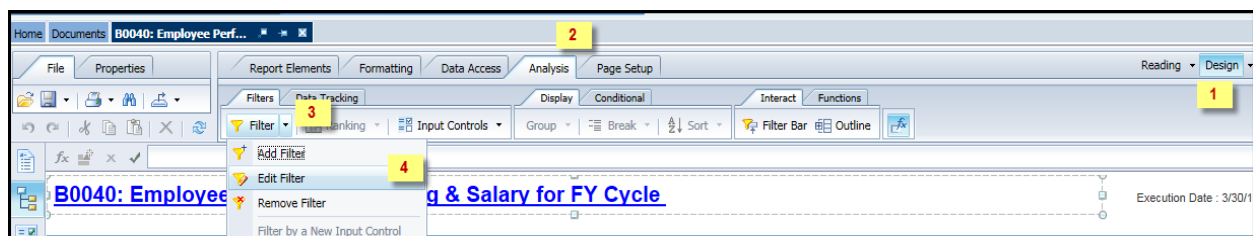


- The following Temporary Employee Subgroups are excluded from the report with a report filter:



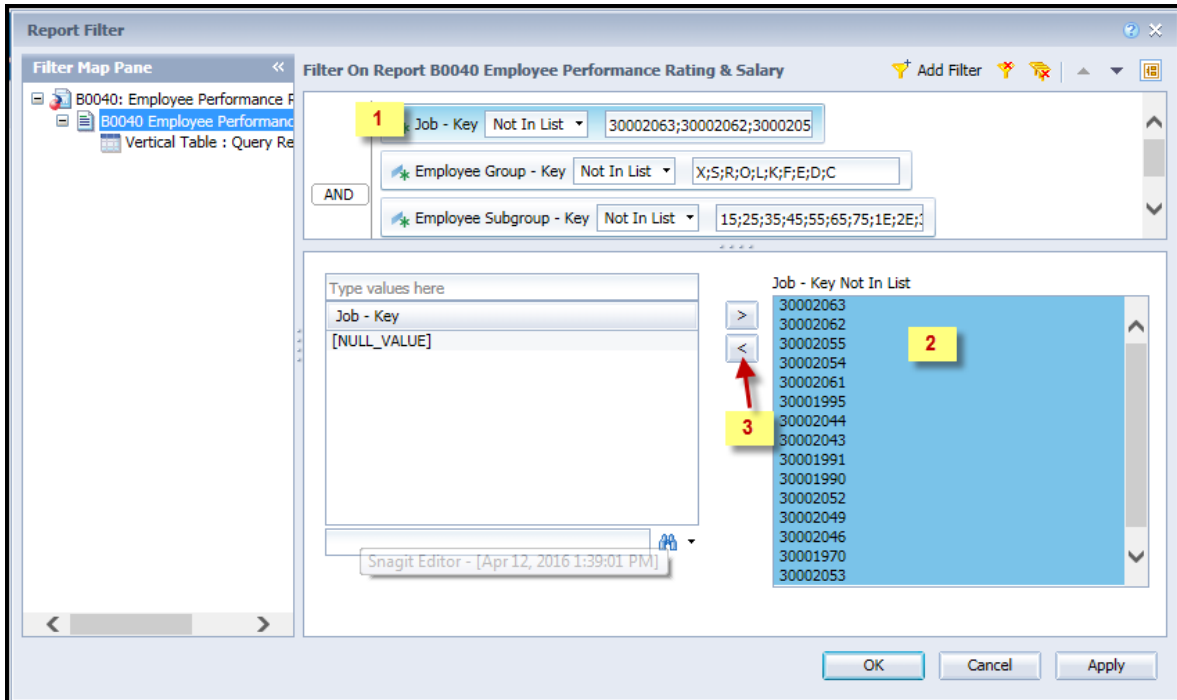
These filters can be edited if you need to include any of these values on the report:

- Once in the report, click on the “Design” menu option to go into design mode (1).
- Click the “Analysis” tab (2).
- Click the Filter drop-down arrow to see the filter options (3).
- Select “Edit Filter” (4).



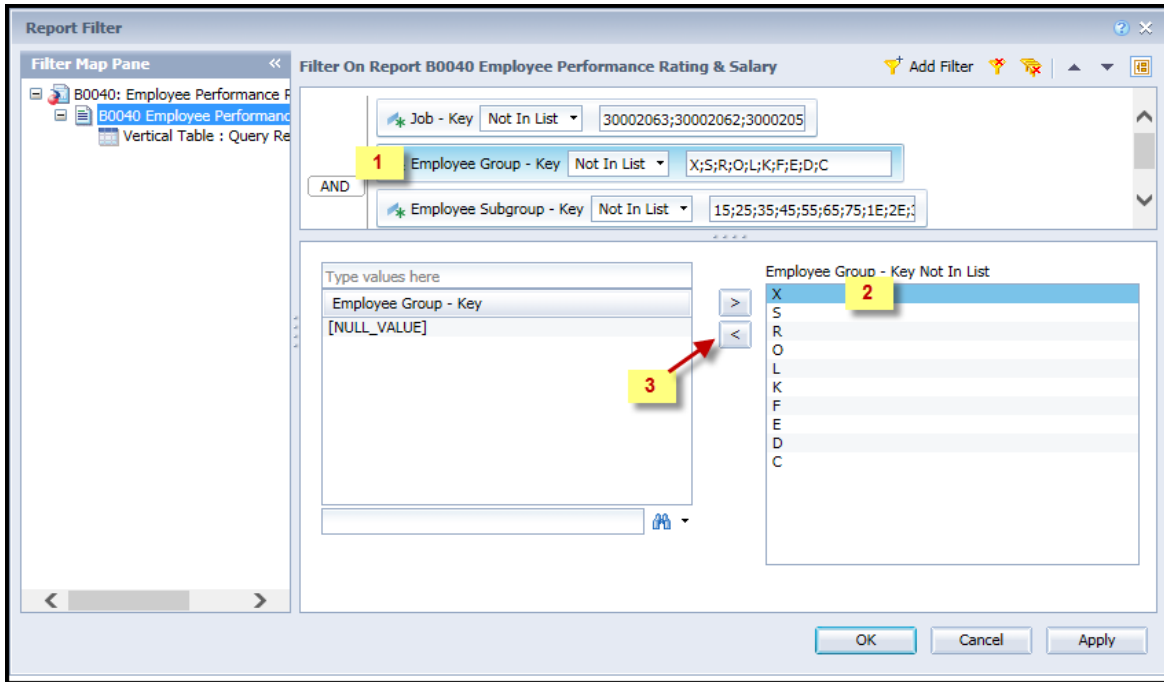
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- The report filter will display.
 - ➔ To include the jobs on the report:
 - Click the “Job – Key” filter to see the jobs that are excluded from the report (1).
 - Select the job(s) you want to include on the report. In this example, the complete list is selected (2).
 - Click the left arrow to remove the job(s) from the exclusion list (3).



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- To include the employee groups on the report:
 - Click the “Employee Group – Key” filter to see the employee groups that are excluded from the report (1).
 - Select the employee group(s) you want to include on the report (2).
 - Click the left arrow to remove the employee group(s) from the exclusion list (3).



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- To include the employee subgroups on the report:
- Click the “Employee Subgroup – Key” filter to see the employee subgroups that are excluded from the report (1).
 - Select the employee subgroup(s) you want to include on the report (2).
 - Click the left arrow to remove the employee subgroup(s) from the exclusion list (3).

