



## BOBJ REPORT DESCRIPTION

### B0201 Quota Balances with Estimated Cost

#### 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

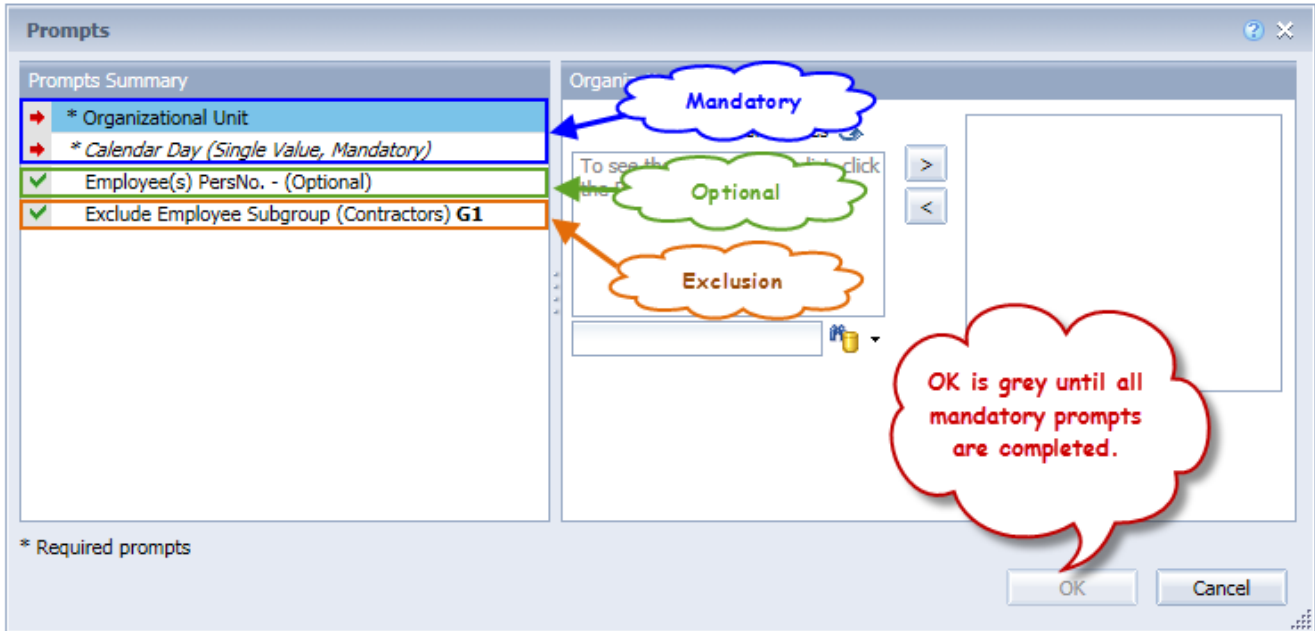
#### Report uses

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

#### Quick Links

How to run this report .....	2
Mandatory Prompts .....	2
Optional Prompts .....	4
Exclusion Prompts .....	5
Default Layout .....	6
Available Objects .....	7
Special Report Considerations/Features .....	8
Change Log .....	9

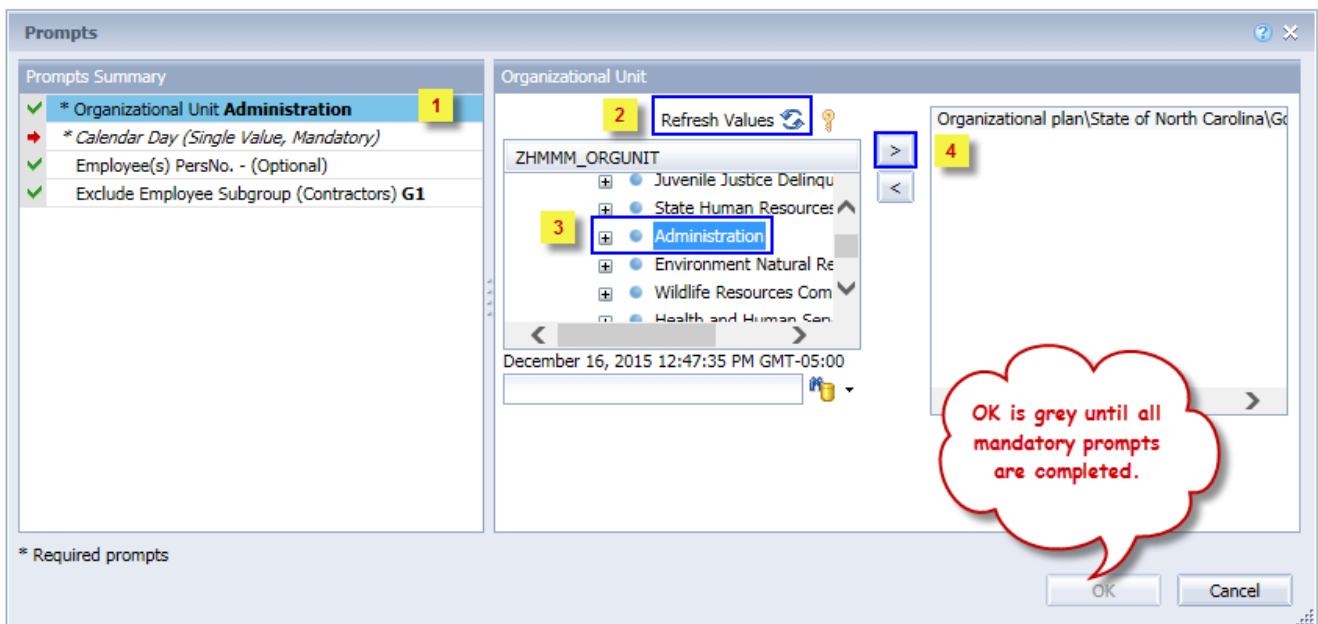
## How to run this report



## 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 the “Refresh Values” icon to see the list of Organizational Units (2).
  - Navigate down to select the desired Org Unit (3).
  - Click the right arrow to add it to the selection box (4).



## BO201 QUOTA BALANCES WITH ESTIMATED COST

- **\*Calendar Day:** To select data for this prompt:
- Make sure the *Calendar Day* prompt is selected (1).
  - Type the desired date using the m/d/yyyy format (2).
- OR** click the calendar icon to select a date from the calendar (3).

The screenshot shows a 'Prompts' dialog box with two main sections. On the left, the 'Prompts Summary' lists several prompts: '\* Organizational Unit Administration' (checked), '\* Calendar Day (Single Value, Mandatory)' (selected with a red arrow and a yellow '1' callout), 'Employee(s) PersNo. - (Optional)' (checked), and 'Exclude Employee Subgroup (Contractors) G1' (checked). On the right, the 'Calendar Day (Single Value, Mandatory)' section shows a text input field with the placeholder 'M/d/yyyy' (with a yellow '2' callout) and a calendar icon (with a blue arrow and a yellow '3' callout pointing to it). A red speech bubble with white text says 'OK is grey until all mandatory prompts are completed.' At the bottom right, there are 'OK' and 'Cancel' buttons. The 'OK' button is currently disabled (greyed out). A '\* Required prompts' label is visible at the bottom left of the dialog.

📁 **NOTE:** The quota data in BI is extracted twice a week on Wednesdays and Saturdays, so you will need to enter a *Calendar Day* that falls on a Wednesday or Saturday.

# BO201 QUOTA BALANCES WITH ESTIMATED COST

## Optional Prompts

Optional prompts are indicated with a green check mark (✓) and are not required. These prompts are used to assist in further 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 the search icon drop down arrow and select “Search in key” (3).
  - Click the search icon (4).
  - Click the key icon (5) to see the employee number.
  - 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*

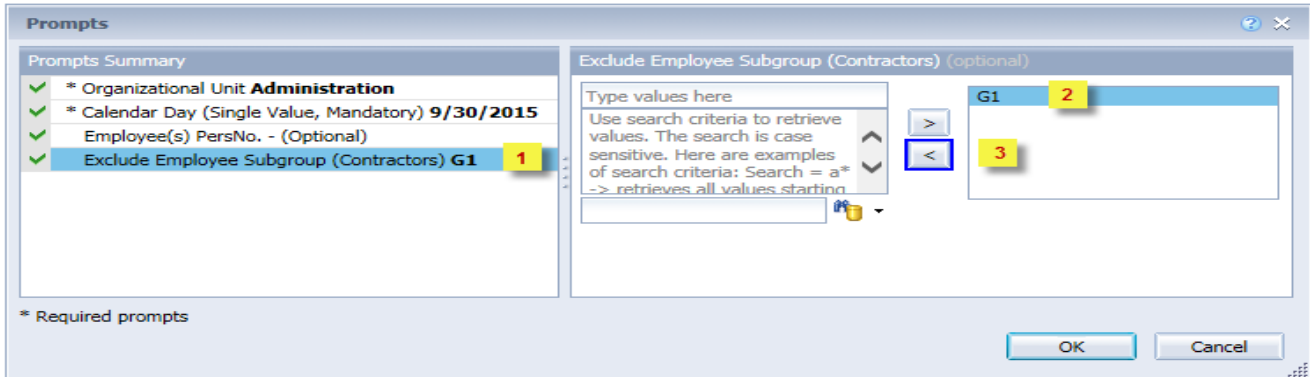
If you know the employee number, it is best to use the manual entry field (in step 7) to enter your selection.

# BO201 QUOTA BALANCES WITH ESTIMATED COST

## Exclusion Prompts

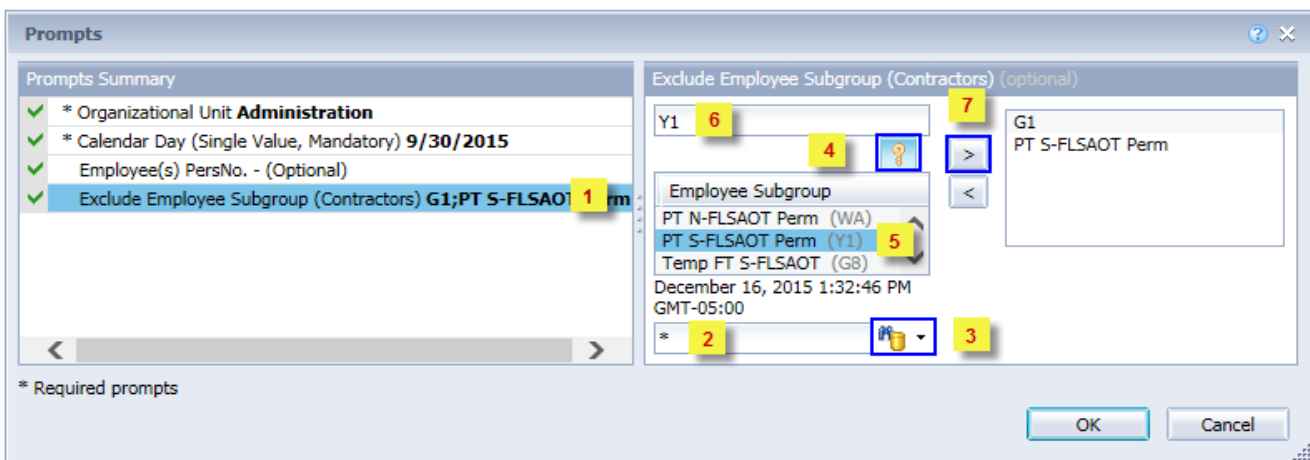
Exclusion prompts are also indicated with a green check mark (✓) but are generally prefilled with a specific set of data values. They are provided as a way to exclude specified data by default while allowing customers the flexibility of changing them when necessary. Any rows containing data values listed in the exclusion selection box will not be retrieved into the report.

- ✓ **Exclude Employee Subgroup (Contractors) G1** - To remove this exclusion
  - Make sure the “Exclude Employee Subgroup” prompt is selected (1).
  - Select the G1 value in the right box (2).
  - Click the left arrow icon to remove the G1 exclusion (3).



To select other subgroups to exclude

- Make sure the “Exclude Employee Subgroup” prompt is selected (1).
- Enter a search text with an asterisk (\*) in the search box to view the list of values for Employee Subgroup (2).
- Click the search icon (3).
- Click the key icon (4) to see the key value for each Employee Subgroup.
- Select the desired Employee Subgroup (5).
- **OR** if you know the Employee Subgroup key or Employee Subgroup name, you can skip steps 2 through 5 and enter it directly in (6).
- Click the right arrow to add the Employee Subgroup to the selection box (7).



## B0201 QUOTA BALANCES WITH ESTIMATED COST

### Default Layout

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

<b><u>B0201: Quota Balances with Estimated Cost as of 9/30/2015</u></b>								
Organizational Unit	Organizational Unit Desc	Employee Name	Employee	Quota/ Att&Abs Type	10 : Vacation Leave		15 : Sick Leave	
					Ending Balance	Estimated Cost	Ending Balance	Estimated Cost
25555555	Communications	MOUSE, MICKEY	12345678		141.01	2,309.74	427.00	6,994.26
26666666	Public Relations	PIG, PETUNIA	12345679		55.98	849.78	48.00	728.64
<b>Total</b>					<b>196.99</b>	<b>3,159.52</b>	<b>475.00</b>	<b>7,722.90</b>

*Continued...*

20 : Overtime Comp Time		21 : Gap Hrs Comp Time		22 : Holiday Comp Time		50 : Bonus Leave		Total	
Ending Balance	Estimated Cost	Ending Balance	Estimated Cost	Ending Balance	Estimated Cost	Ending Balance	Estimated Cost	Ending Balance	Estimated Cost
95.13	1,558.23	3.00	49.14			40.00	655.20	706.14	11,566.57
11.64	176.70			8.00	121.44			123.62	1,876.56
<b>106.77</b>	<b>1,734.93</b>	<b>3.00</b>	<b>49.14</b>	<b>8.00</b>	<b>121.44</b>	<b>40.00</b>	<b>655.20</b>	<b>829.76</b>	<b>13,443.13</b>

# B0201 QUOTA BALANCES WITH ESTIMATED COST

## Available Objects

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

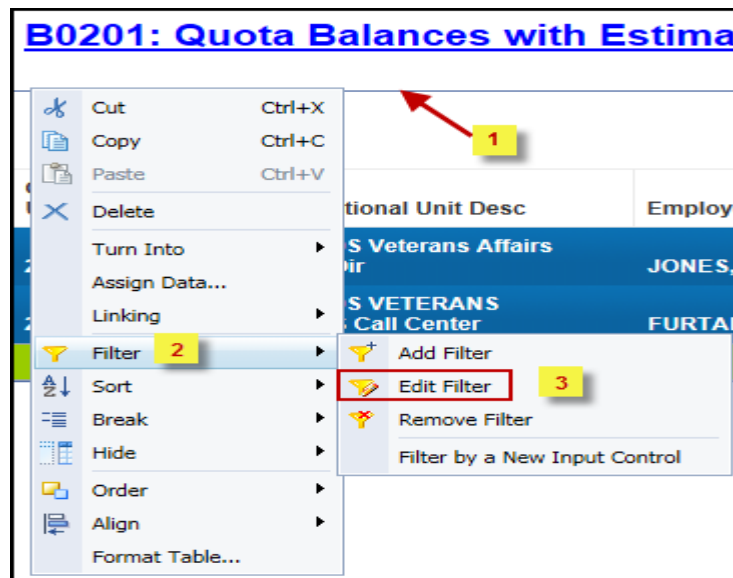
B0201: Quota Balances with Estimated Cost

- + 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
- + Working Week
- + Work Schedule Rule
- Ending Balance
- Estimated Cost
- Variables
  - Prompt Response Calendar Day
  - Prompt Response Employee PersNo
  - Prompt Response Exclude Employee Subgroup
  - Prompt Response Organizational Unit

# BO201 QUOTA BALANCES WITH ESTIMATED COST

## Special Report Considerations/Features

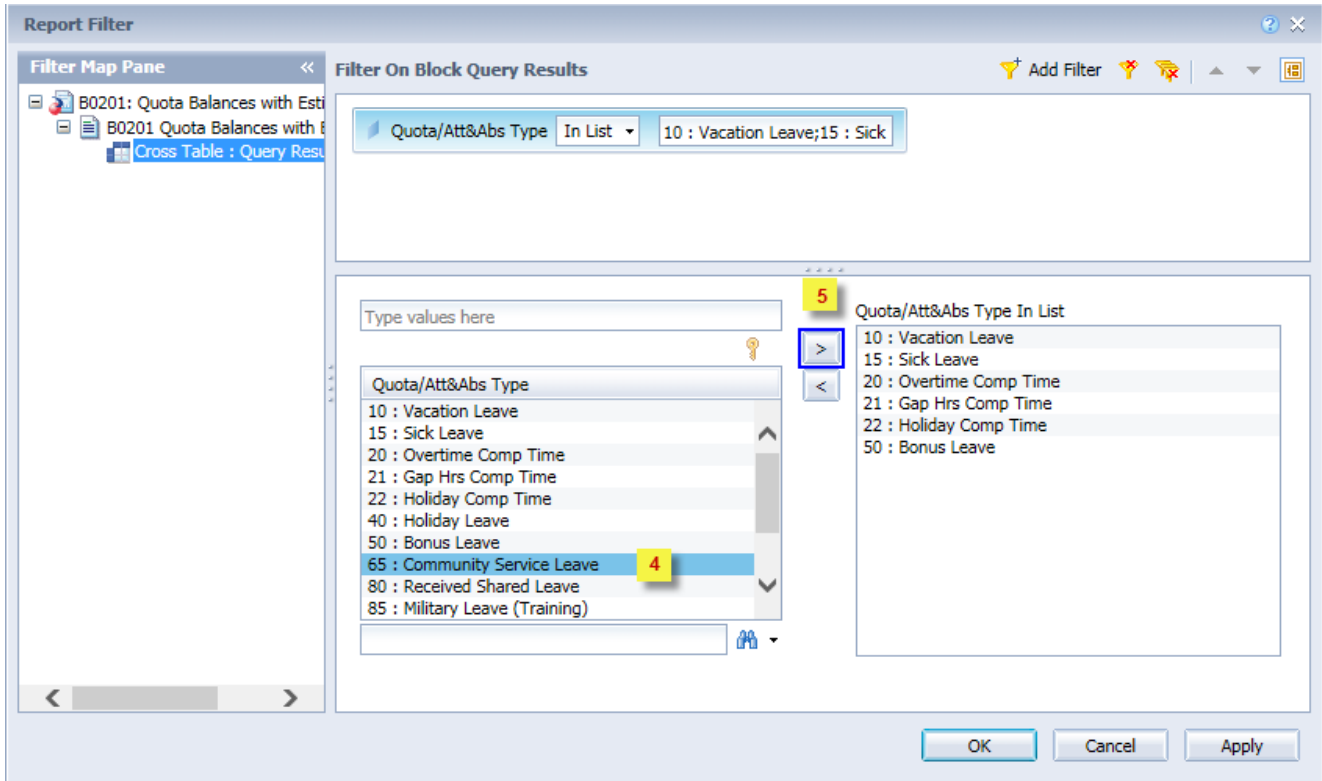
- Quota data in BI is extracted twice a week on Wednesdays and Saturdays, so the “Calendar Day” date prompt needs to include a date that falls on a Wednesday or Saturday.
  - This report will include only data that is extracted for the previous 3 months up to the current date.
  - Contractors are excluded 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
    - 50: Bonus Leave
- ✓ To modify this default filter to allow other quotas to be shown:
- Hover your mouse over the top edge of the crosstab table (1).
  - Right-mouse click to bring up the context menu.
  - Select *Filter* (2) then *Edit Filter* (3).





# BO201 QUOTA BALANCES WITH ESTIMATED COST

- When the Edit screen pops up, select any additional desired Quota/Att&Abs Type(s) (4).
- Click the right arrow to add it to the selection box (5).



## Change Log

Effective Date	Change description
1/7/2016	Initial version of report migrated to BOBJ.
10/18/18	Documentation updated to note quota balance precision error for split funded positions.
12/7/18	Documentation updated to clarify that the “Calendar Day” date prompt needs to include a date that falls on a Wednesday or Saturday. Also, clarified that the report will include only data this is extracted for the previous 3 months up to the current date.