

**HR Management Quota Activity (QU-001)**

**Description:** Quota usage and balance per month by specified quota types and business area. Sick leave data used for HR Management workforce reporting. Individual views include Quota Used and Quota Balance. Excludes non-employees.

- ✓ **Universe** WWA EDW Quota.unx
- ✓ **Required filter prompt** Calendar Year Month
- ✓ **Quota Used (default)** Average quota used per month by Business Area and Quota Type
- ✓ **Quota Balance** Average quota balance per month by Business Area and Quota Type

The standard report is located in the Washington Workforce Analytics Reports - Web Intelligence > Quota folder.

Title	Type	Description
Financials	Folder	AFRS reports
Grievance	Folder	Grievance reports
Headcount and Personnel Actions	Folder	Headcount and Personnel Actions reports
Payroll	Folder	Payroll reports
<b>Quota</b>	Folder	Quota reports
Staffing Assignments	Folder	Staffing Assignments reports

**Sample View - HR Management Quota Activity > Quota Used**

Business Area Code (EE)	Business Area (EE)	Quota Type	Unit of Measure	202212	202301	202302	202303	202304	Average Quota Used
3100	Department of Corrections	Annual Leave/Vacation	Hours	14.36095	6.95787	7.66709	9.63128	11.15760	<b>9.95496</b>
3100	Department of Corrections	Compensatory Time	Hours	12.76697	9.19629	9.61085	10.51748	11.55230	<b>10.72878</b>
3100	Department of Corrections	Excess Vacation Accrual	Hours	0.00000	0.00000	0.00000	2.10008		<b>0.52502</b>
3100	Department of Corrections	Foster Parent Leave Pool	Hours	0.00000	0.00000	0.00000	0.00000	0.00000	<b>0.00000</b>
3100	Department of Corrections	Holiday Comp/Credits WSP	Hours	0.00000	0.00000	0.00000	0.00000	0.00000	<b>0.00000</b>
3100	Department of Corrections	Jus.Excess Leave	Hours	7.33333	5.50000	16.46666	21.50000	9.08334	<b>11.97667</b>
3100	Department of Corrections	Military Leave	Hours	1.46565	1.35223	1.23094	1.68000	1.61731	<b>1.46923</b>
3100	Department of Corrections	Personal Holiday - Shift	Days	0.82641	0.05159	0.05890	0.05610	0.06330	<b>0.21126</b>
3100	Department of Corrections	Personal Leave Day	Days	0.57755	0.06073	0.06169	0.10795	0.13152	<b>0.18789</b>
3100	Department of Corrections	PH - Shared Lv. Donation	Hours	0.00000	0.00000	0.00000	0.00000	0.00000	<b>0.00000</b>
3100	Department of Corrections	Shared Leave	Hours	18.01316	12.21652	12.77845	12.73361	14.57767	<b>14.06388</b>
3100	Department of Corrections	Sick Leave	Hours	8.17017	6.22712	6.51962	7.84324	6.69110	<b>7.09025</b>

## Prompts

Prompt values restrict the data pulled from the Enterprise Data Warehouse.

**Required Prompts** must include value(s) for Calendar Year Month.

### Optional Prompts

- Business Area (EE)
- Business Area Code (EE)
- Employment Status
- Employment Status Code
- Job (EE)
- Job Class Abbr (EE)
- Job Code (EE)
- Organizational Unit
- Organizational Unit Code
- Personnel Area (EE)
- Personnel Area Code (EE)
- Personnel Subarea (EE)
- Personnel Subarea Code (EE)
- Quota Type

## Query Results

### Default Data Fields

These fields are included in the standard report by default. Adding or removing default data fields may impact the calculated results.

#### Quota Used

- Business Area Code (EE)
- Business Area (EE)
- Quota Type
- Unit of Measure
- Calendar Year Month
- Average Quota Used

#### Quota Balance

- Business Area Code (EE)
- Business Area (EE)
- Quota Type
- Unit of Measure
- Calendar Year Month
- Average Quota Balance

### Additional Fields

These additional fields may be added to the standard report for detail and analysis. Adding or removing additional data fields may impact the calculated results.

- Calendar Year
- Calendar Year Month
- Calendar Year Quarter
- Contract Type
- Duty Station County
- Employee Group (EE)
- Employee Subgroup (EE)
- Employment Status
- Fiscal Year
- Fiscal Year Month
- Fiscal Year Quarter
- Job (EE)
- Job Class Abbr (EE)
- Job Code (EE)
- Name – Full
- Organizational Unit
- Organizational Unit Code
- Part Time Indicator
- Pay Area (EE)
- Pay Area Code (EE)
- Personnel Area (EE)
- Personnel Area Code (EE)
- Personnel Number
- Personnel Subarea (EE)
- Personnel Subarea Code (EE)
- Position
- Position Code
- Quota End Balance
- Quota Used
- Unemployment County
- Unemployment County Code
- Work Contract
- Work Contract Code
- Workforce Indicator (EE)
- Workforce Indicator Code (EE)

## Measures

These measures are included in the standard report. Adding or removing measures from the query will impact the calculated results.

- Distinct Employee Count
- Quota End Balance
- Quota Used

## Restrictions and Variables

Restrictions and formulas built into the report create standardized results across the enterprise.

### Restrictions

#### Non-Employee Exclusions

Excludes the following Organizational Unit Codes:

- 30002393 FPB – Preparedness - Mobes
- 31000100 EMERGENCY FIRE FIGHTERS
- 31000101 EMERGENCY FIRE FIGHTERS
- 31000175 EMERGENCY FIRE FIGHTERS
- 31000176 EMERGENCY FIRE FIGHTERS
- 31000177 EMERGENCY FIRE FIGHTERS
- 31000178 EMERGENCY FIRE FIGHTERS
- 31000179 EMERGENCY FIRE FIGHTERS
- 31007000 FPB – Preparedness – Fire Mobes

Excludes the following Personnel Area Codes (EE):

- 2201 Vol Firefighters/Res Officers
- 2251 WSP Disabled Non-Employee
- 2451 Mil Dept Misc Active Duty
- 3430 Higher Ed Coor Board
- 3460 Higher Ed Facilities
- 4611 Ecology Youth Corps
- 4612 Wa Conservation Corps
- 5401 Aberdeen Wex
- 5402 Bingen Wex
- 5403 Clallum Wex
- 5404 Kitsap Wex
- 5405 Okanogan Wex
- 5406 Okanogan Wex 2
- 5407 Rainier Wex
- 5408 Snohomish Wex
- 5409 Spokane Wex
- 5410 Tri-Cities Wex
- 5411 Americorp Star Vista
- 5412 Wa St Americorps
- 5413 JTPA 402 Prog Wen
- 5414 Washington Service Corps
- 5415 Washington Service Team
- 5416 Yakima Wex

Also excludes Pay Area Code (EE) 44 Work Study Student; Personnel Subarea Code (EE) 0005 Non-Employee; and Work Contract Code 24 Non Employee.

### Variables

The following variables are included in the report:

Variable	Formula
Average Employee Count	Average([Employee Count] ForEach([Calendar Year Month];[Business Area Code (EE)]))
Average Quota Balance	Average([Average – Quota Hours Balance])
Average Quota Used	Average([Average – Quota Hours Used])
Average – Quota Hours Balance	Sum(If [Employee Count] > 0 Then Round([Quota Hours Balance]/[Employee Count];5))
Average - Quota Hours Used	Sum(If [Employee Count] > 0 Then Round([Quota Used]/[Employee Count];5))
Employee Count	Sum(If [Employment Status] In ([Calendar Year Month];[Business Area Code (EE)];[Personnel Number]) InList ("Active";"Inactive") Then [Distinct Employee Count])
Quota Hours Balance	Sum(If [Employment Status] InList ("Active";"Inactive") Then [Quota End Balance])
Quota Hour Used	Sum([Quota Used])