



# EMPLOYEE APPOINTED EXEMPT DESIGNATION

## REPORT DESCRIPTION B0032 | WEB INTELLIGENCE

**BOBJ**

The purpose of this report description is to explain how to generate and use the Employee Appointed Exempt Designation report.

### REPORT DESCRIPTION

This report shows the appointed employee designations to Exempt Policy-Making and Exempt Managerial. It also provides necessary information for determining employment rights when the employee is removed from the exempt appointment.

### REPORT LOCATION

PA: EMPLOYEE DETAILS

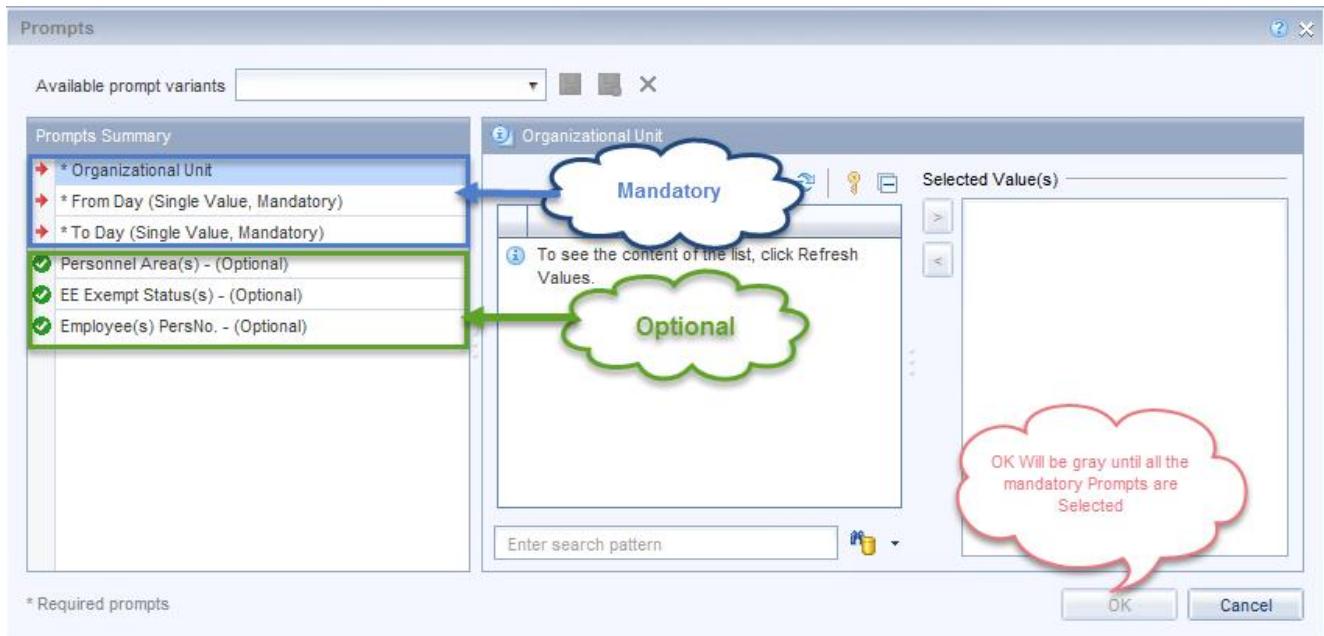
### REPORT USES

To verify the number of exempt appointments for these two categories and to assist with employment rights as needed.

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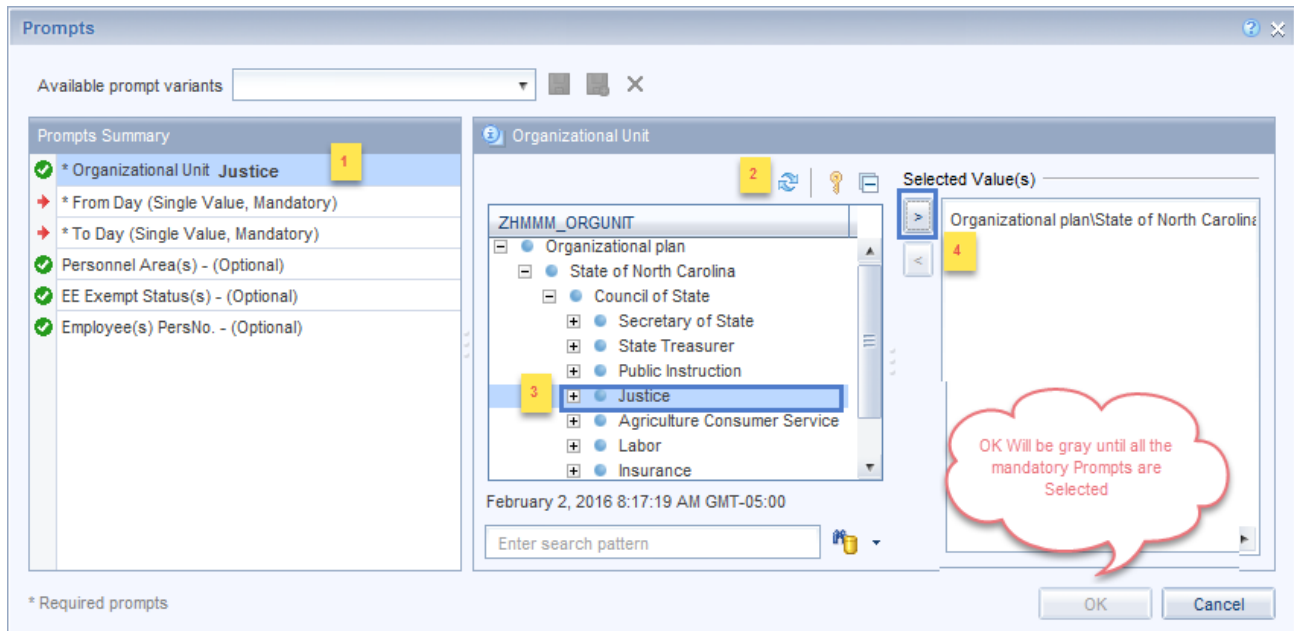
## How to generate this report



### 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 Org Units (2).
  - Navigate down to the desired Org Unit (3).
  - Click the right arrow to add it to the selection box (4).



- ➔ **\*From Day (Single Value, Mandatory):** To select data for this prompt:
- Make sure the “From Day (Single Value, Mandatory)” prompt is selected (1).
  - Enter a date using the ‘mm/dd/yyyy’ format.
  - To choose from a calendar,
    - Click the calendar icon (2).
    - Click the up or down arrow icon to select the desired month/year (3).
    - Click the date as needed (4).

The screenshot shows a 'Prompts' dialog box with a 'Prompts Summary' list on the left and a 'From Day (Single Value, Mandatory)' prompt on the right. The summary list includes several prompts, with '\* From Day (Single Value, Mandatory) 2/2/2016' highlighted. The right panel shows a date field with '2/2/2016' and a calendar icon (2). Below the date field is a calendar for February 2016 (3). The calendar shows days of the week (S, M, T, W, T, F, S) and dates (1 through 29). The date '2' is selected (4). At the bottom of the calendar is a 'Today' button. The dialog box has 'OK' and 'Cancel' buttons at the bottom right.

- ➔ **\*To Day (Single Value, Mandatory):** To select data for this prompt:
- Make sure the “To Day (Single Value, Mandatory)” prompt selected (1).
  - Enter a date using the ‘mm/dd/yyyy’ format.
  - To choose from a calendar,
    - Click the calendar icon (2).
    - Click the up or down arrow icon to select the desired month/year (3).
    - Click the date as needed (4).

The screenshot shows a 'Prompts' dialog box with a 'Prompts Summary' list on the left and a 'To Day (Single Value, Mandatory)' prompt on the right. The summary list includes several prompts, with '\* To Day (Single Value, Mandatory) 2/5/2016' highlighted and marked with a yellow '1'. The right panel shows the date '2/5/2016' with a calendar icon (2) and a dropdown arrow (3). The calendar for February 2016 is displayed, with the date '5' highlighted (4). The 'Today' button is at the bottom of the calendar. The dialog has 'OK' and 'Cancel' buttons at the bottom right.

**Note:** To Day must be a later date than From Day.

## Optional Prompts

Optional prompts are indicated with a green check mark (✓) but are not pre-filled or required. They are used to assist in further 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).
  - Enter a search text with an asterisk (\*) in the search box to view the list of values for Personnel Area (2).
  - Click the search icon (3).
  - To see the key value for each Personnel Area, click the key icon (4).
  - Select the desired Personnel Area (5).
  - **OR**, if the Personnel Area key or Personnel Area name is known, skip steps 2 through 5 and enter it directly in (6).
  - Click the right arrow to add the Personnel Area to the selection box (7).

The screenshot shows a 'Prompts' dialog box with the following components:

- Prompts Summary:** A list of prompts on the left. The 'Personnel Area(s) - (Optional)' prompt is highlighted with a yellow box labeled '1'.
- Personnel Area(s) - (Optional) Configuration:**
  - Type a value:** A search box containing '0701' with a yellow box labeled '6'.
  - Search Icon:** A magnifying glass icon with a yellow box labeled '3'.
  - Personnel Area List:** A list of values including 'State Treasurer (0701)', 'Public Instruction (0801)', 'Justice (0901)', 'Agriculture Consumer Services (1001)', 'Labor (1101)', 'Insurance (1201)', 'State Controller (1401)', and 'Transportation (1501)'. 'State Treasurer (0701)' is selected with a yellow box labeled '5'.
  - Key Icon:** A key icon with a yellow box labeled '4'.
  - Selected Value(s):** A box on the right containing 'State Treasurer' and 'Public Instruction'. 'State Treasurer' is highlighted with a yellow box labeled '7'.
  - Right Arrow:** A right-pointing arrow icon with a yellow box labeled '2'.
- Footer:** A timestamp 'February 2, 2016 8:59:58 AM GMT-05:00' and 'OK'/'Cancel' buttons.

- ✓ **EE Exempt Status(s) - (Optional):** To select data for this prompt:
  - Make sure the “EE Exempt Status(s) - (Optional)” prompt is selected (1).
  - Enter a search text with an asterisk (\*) in the search box to view the list of values for EE Exempt Status (2).
  - Click the search icon (3).
  - To see the key value for each EE Exempt Status, click the key icon (4).
  - Navigate down to the desired EE Exempt Status (5).
  - **OR**, if the EE Exempt Status key or EE Exempt Status name is known, skip steps 2 through 5 and enter it directly in (6).
  - Click the right arrow to add the EE Exempt Status to the selection box (7).

**Prompts**

Available prompt variants: [dropdown]

**Prompts Summary**

- ✓ \* Organizational Unit **State of North Carolina**
- ✓ \* From Day (Single Value, Mandatory) **2/2/2016**
- ✓ \* To Day (Single Value, Mandatory) **2/5/2016**
- ✓ Personnel Area(s) - (Optional) **State Treasurer;Agriculture**
- ✓ **EE Exempt Status(s) - (Optional) Exempt Policy-Making** (1)
- ✓ Employee(s) PersNo. - (Optional)

**EE Exempt Status(s) - (Optional) (optional)**

Search box: 0001 (6)

Search icon (3)

Key icon (4)

Results list:

- EE Exempt Status
- Exempt Policy-Making (0001) (5)
- Exempt Managerial (0002)

Selection box: Exempt Policy-Making (7)

Navigation arrows: > <

February 2, 2016 12:53:04 PM GMT-05:00

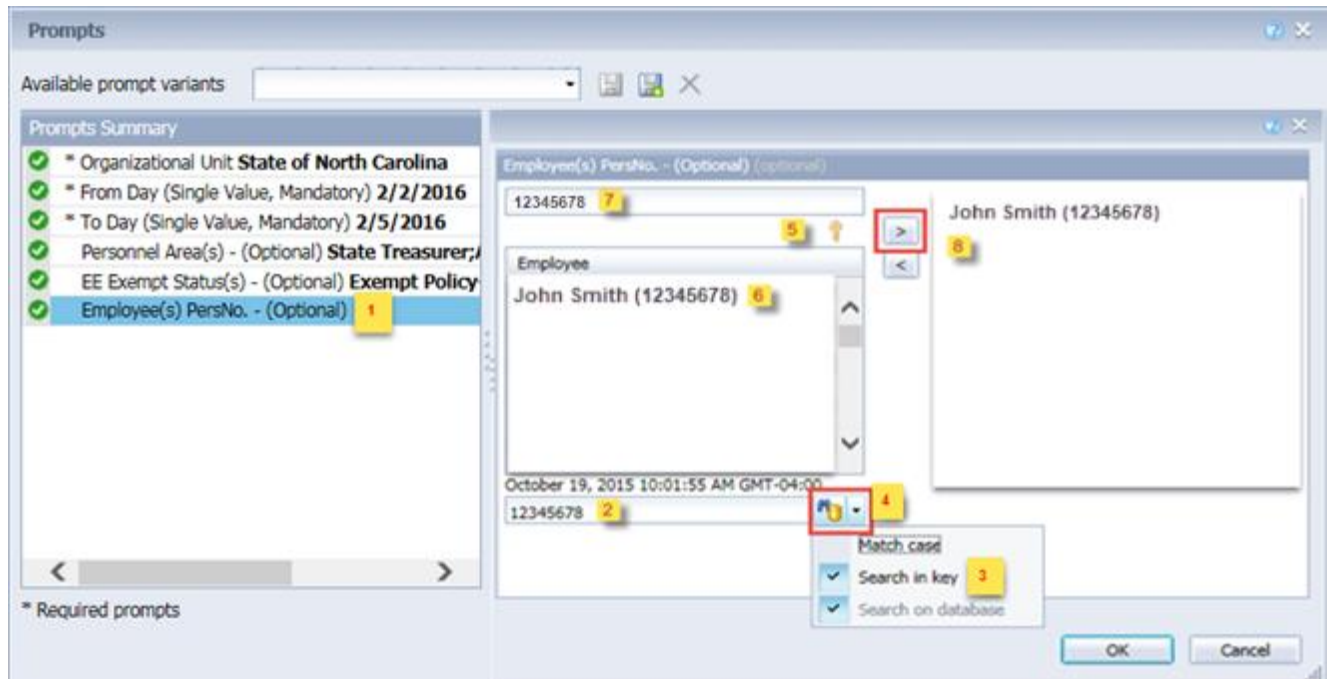
Search box: \* (2)

Search icon (3)

\* Required prompts

OK Cancel

- ✓ **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 the employee number is known, 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 the system has a large number of employees, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If the employee number is not known and a name search must be done, narrow down the search by using the wildcard with specific text strings when looking for an employee by name such as:

*John\*Smith\**

*\*Smith*

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

## Initial Layout

The report shows the appointed employee designations to Exempt Policy-Making and Exempt Managerial. Below is a sample of the report:

### B0032: Employee Appointed Exempt Designation

From Day - To Day : 4/1/2014 - 4/30/2014

Organizational Unit	Organizational Unit Desc	Personnel Area	Position	Position Desc	Job	Job Desc	Statutory Exemption Type	Employee's Name
22222222	HHS Office	Health Human Services	99999999	Technician II	31111111	Marketing Technician	Exempt Managerial	ALICE, BOB
22222222	HHS Office	Health Human Services	99999999	99999999	31002876	Media Technician	Not assigned	DOE, JANE
22222222	HHS Office	Health Human Services	99999999	99999999	33333333	Communications Specialist	Not assigned	SMITH, JOHN

Continued ...

Employee	EE Exempt Status	Exempt Designation Date	Hire/Rehire Date	Career Status	Cumulative SPA Service Years	Priority Reemployment	Most Recent SPA Grade	Comments?	Most Recent SPA Salary
11111111	Exempt Managerial	7/31/13	5/28/79	Yes	10 or more years	Mandatory	63	X	40,000.00
12222222	NON Exempt	9/30/13	1/24/11	Yes	Less than 10 years	One-time	60	#	35,000.00
13333333	NON Exempt	8/31/13	3/1/07	Yes	10 or more years	One-time	62	#	37,000.00



The Report Info tab displays the information about the prompts entered.

### Report Info

**Prompt Input**

Organizational Unit	Organizational plan
From Day - To Day	9/1/2013 - 9/30/2013
Personnel Area(s)	
EE Exempt Status(s)	
Employee(s) PersNo.	

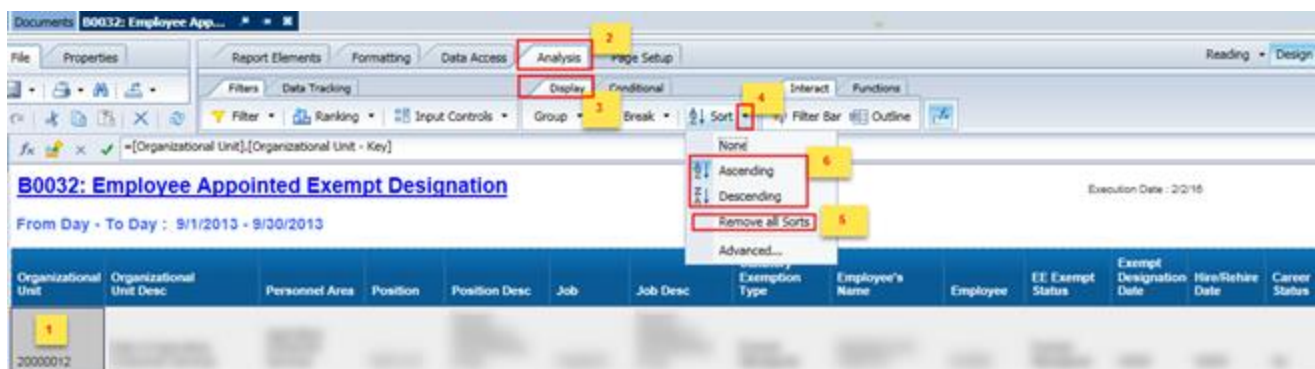
## Available Objects

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



## Special Report Considerations/Features

- ✓ To change the sorting for the desired column:
  - By default, data is sorted by Personnel Area. (This can be changed as needed).
  - Make sure the “desired column” is selected (1).
  - Click the “Analysis” tab (2).
  - By default, the “Display” tab is selected (3).
  - Click the “drop-down icon” as shown (4).
  - Click “Remove all sorts” (5).
  - Select ascending or descending sort order as needed (6).



- ✓ To View B0022: Comments Report (Hyperlink)
  - Make sure the desired column ‘Comments?’ is selected (1).
  - Click the ‘X’ as highlighted (1) to navigate to B0022: Comments.
  - The B0022: Comments report opens in a new tab.

Position Desc	Job	Job Desc	Statutory Exemption Type	Employee's Name	Employee	EE Exempt Status	Exempt Designation Date	Hire/Rehire Date	Career Status	Cumulative SPA Service Years	Priority Reemployment	Most Recent SPA Grade	Comments?	Most Recent SPA Salary
Program Manager	31111111	Program Manager	Exempt Managerial	SMITH, JANE	12345678	Exempt Managerial	7/31/13	5/28/79	Yes	10 or more years	Mandatory	64	<a href="#">X</a>	40,000.00

## Change Log

Effective Date	Change	Modifier
9/22/2020	Modified Screenshots	Laura Lee