Oracle® Human Resources Management Systems

Strategic Reporting (HRMSi) User Guide

Release 11*i*

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Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide, Release 11*i*

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Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle HRMS.

  If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University
- Oracle Self-Service Web Applications.

  To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

See Related Documents on page xii for more Oracle Applications product information.

TTY Access to Oracle Support Services

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Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Structure

Related Documents

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle HRMS.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

OA Personalization Framework and OA Extensibility Framework

Learn about the capabilities of the 5.6 Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

Learn how to use Oracle HRMS to represent your enterprise. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining person types to represent your workforce, and also how to manage your budgets and costs.

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

Learn about wage attachments, taxes and social insurance, the payroll run, and other processes.

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

Learn how to use Oracle HRMS to manage your total compensation package. For example, read how to administer salaries and benefits, set up automated grade/step progression, and allocate salary budgets. You can also learn about setting up earnings and deductions for payroll processing, managing leave and absences, and reporting on compensation across your enterprise.

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration in Oracle HRMS

Learn about extending and configuring Oracle HRMS, managing security, auditing, information access, and letter generation.

Oracle Human Resources Management Systems Implementation Guide

Learn about the setup procedures you need to carry out in order to successfully implement Oracle HRMS in your enterprise.

Oracle Human Resources Management Systems FastFormula User Guide

Learn about the different uses of Oracle FastFormula, and understand the rules and techniques you should employ when defining and amending formulas for use with Oracle applications.

Oracle Human Resources Management Systems Deploy Self-Service Capability Guide

Set up and use self-service human resources (SSHR) functions for managers, HR Professionals, and employees.

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMSi) in your environment.

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence reports included in the HRMSi product, including Daily Business Intelligence reports, Discoverer workbooks, and Performance Management Framework reports.

Implementing Oracle Approvals Management

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications. Download this guide from Oracle *MetaLink*, Note: 282529.1.

Oracle iRecruitment Implementation Guide

Set up Oracle *i*Recruitment to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

Set up and use Oracle Learning Management to accomplish your online and offline learning goals.

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

Learn how to capture work patterns such as shift hours so that this information can be used by other applications such as General Ledger.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

"About" Document

For information about implementation and user document, instructions for applying patches, new and changes setup steps, and descriptions of software updates, refer to the "About" document for your product. "About" documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License

Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle HRMS implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*.

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. this manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

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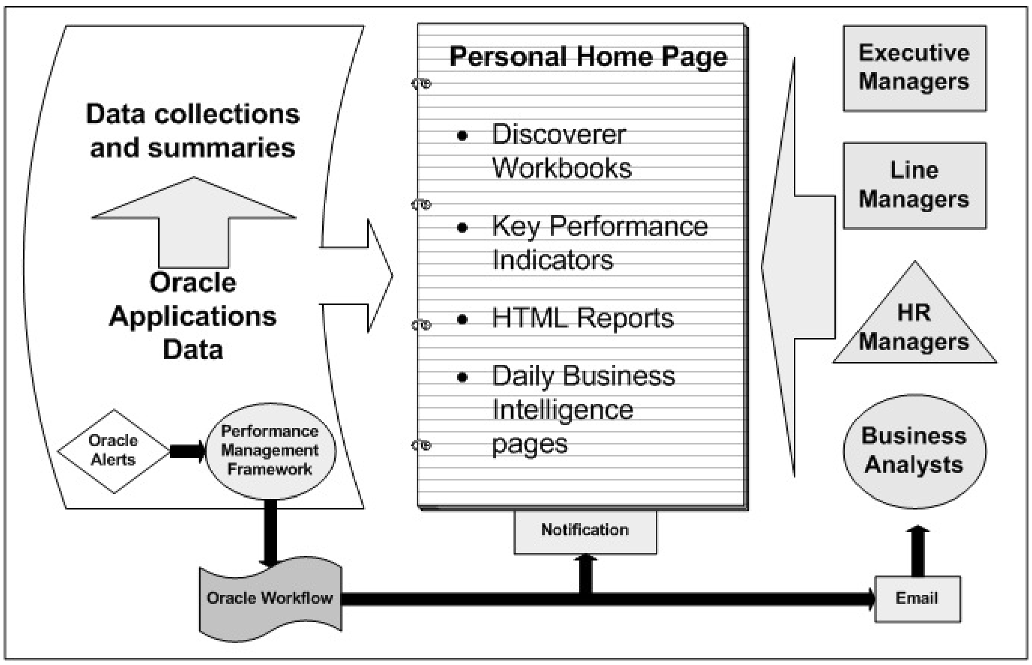
Strategic Reporting (HRMSi) User Guide

Strategic Reporting Overview

Oracle HRMS Intelligence (HRMSi) is a product in Oracle's E-Business Intelligence System application suite (E-BI) specific to human resources. HRMSi provides a web-enabled suite of strategic reports that provide summaries and details of HRMS application data. It also provides the tools to create your own reports.

The aim of HRMSi strategic reports is to enable you to measure, monitor and manage enterprise performance to make better, timelier decisions. To achieve this HRMSi uses a variety of reporting systems and database technologies to provide reports across the range of HRMS functionality.

The diagram below provides an outline of how HRMSi reporting modules work together to provide a range of users with strategic reports through Oracle Self Service.



Each module is described in detail below. Your system administrator may implement all, or individual modules, depending on which modules best meet your enterprise reporting requirements.

Discoverer Workbooks and End User Layer (EUL)

HRMSi uses Oracle Discoverer to create workbooks containing worksheet reports and graphs. The worksheets provide:

- Summaries of your enterprise human resources data.
- Analyses of trends over time.
- Comparisons of workforce changes across your enterprise.

Discoverer Analytics Reports

Discoverer Analytics reports are Discoverer workbooks are intended for use by business analysts, or those wanting further understanding of HR data. They provide detailed analysis of aspects of the HR system, and are adept at analyzing data over time and comparing trends.

Performance Management Framework

The Performance Management Framework (PMF) is central to HRMSi and enables you to assess the performance of your enterprise against predefined targets using Key Performance Indicators (KPIs).

You can use the KPIs to:

- Store target figures and tolerance ranges.
- Automatically generate alerts to notify you when actual values are outside your target tolerance levels.
- Create workflows to take action against out of tolerance situations.

The Performance Management Viewer (PMV) reports enable you to view KPI values and compare them with actual values. In the graph region you can display KPIs graphically to track your KPI trends.

Data Warehouse Module

The Data Warehouse module contains Discoverer workbooks that are based on Oracle Embedded Data Warehouse (EDW). HRMSi uses EDW to collect human resources data into a number of facts and dimensions (data warehouse structures).

The data in the facts and dimensions is structured to more closely match reporting requirements, which improves report performance. The data is not real-time, but only current for the last collection date.

HTML reports

HTML reports are based on the HRMS transactional tables. They enable you to view data at a high level using a standard web browser layout.

Daily Business Intelligence for HRMS

Daily Business Intelligence (DBI) for HRMS provides high level summary reports tailored for managers. DBI presents the HRMS reports as tables and graphs in the HR Management HTML page. The tables and graphs summarize the HRMS data.

Other product groups, such as Financials, create pages with reports relevant to their products. For a description of all DBI reports see: *Oracle E-Business Intelligence Daily Business Intelligence User Guide* on Metalink.

What is Strategic Reporting?

The following sections answer common questions on HRMSi strategic reporting and give an overview of the functionality.

What does Strategic Reporting mean?

HRMSi strategic reports are fully integrated with Oracle HRMS and allow you to gather high-level strategic information concerning the key business performance issues and business questions relating to human resources.

You can set targets for your business objectives, monitor performance, and receive notifications when performance is outside predefined tolerance limits for the targets; you can then respond quickly and effectively to maintain business performance.

You have pre-defined reports which can provide answers to typical, but complex, business questions, such as:

- *Are my different types of workers balanced to meet my business objectives?*
- *Do salaries correlate with other factors, such as age or service?*
- *How successful is my recruitment and what is the trend?*
- *What competencies do my employees hold, and what competencies do they require?*

Oracle HRMS Intelligence also provides an easy to use interface that enables you to produce adhoc reports across your system. It is a flexible system that enables you to extend the existing content. For analysis purposes, you can group employees by job, organization, cost-center, profit-center, ethnic or gender groups, age, service and compensation bands, to name only a few. In addition, the analytical concepts are easy to use, enabling you to do complex and detailed analysis of your workforce.

How does strategic reporting differ from standard workforce intelligence?

HRMSi reports do not, on the whole, report directly on data held in the HRMS transactional tables. Instead, they use a mixture of collected, pre-calculated information held in summary tables for complex data, and real-time data held in the transactional tables when reports require simple data. Some of the reporting technologies, for example Daily Business Intelligence, rely on collected data more than others.

The advantage of the summary tables is that you collect the more complex data prior to running the reports. The use of such complex data would otherwise impede reporting performance.

HRMSi provides programs you can run to update the data in the summary tables as often as you require.

In addition, HRMSi includes a performance management framework containing key performance indicators. You can set performance targets and receive alerts if your workforce changes become critical.

Strategic reporting therefore provides highly efficient summary information to enable you to quickly evaluate trends and statuses throughout your enterprise. This information enables you to respond in a timely manner to changes in your enterprise.

How can HRMSi meet my enterprise's unique reporting requirements?

HRMSi recognizes that reporting requirements for an enterprise are unique. You can adapt the predefined Discoverer workbooks to match your exact criteria. You can create your own workbooks based on the predefined Discoverer end user layer. HRMSi also provides analytical workbook templates and an analytical end user layer to enable you to define your own analysis of your workforce.

Strategic Reporting Key Concepts

Workforce

Workforce is one of the key concepts used within the HRMS reports and the Performance Management Framework. For information on how workforce is calculated, see: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

HRMS Intelligence Key Performance Indicators

This section provides guidelines for using the HRMS Intelligence Key Performance Indicators (KPIs).

Performance Management Framework

HRMSi provides a performance management framework that enables you to track the performance of key areas of your enterprise and act quickly when this performance falls beyond targets that you have set up.

Within the performance management framework, HRMSi provides KPIs in the following functional areas:

Salary and Grade Related Pay and Progression

- HRI Salaries Varying From Grade Mid Point KPI
- HRI Workforce Assignment Count Above Their Grade Mid Point KPI
- HRI Workforce Assignment Count Below Their Grade Mid Point KPI

Learning Management

- HRI Training Attendance Status KPI
- HRI Training Attendance with Job Category Status KPI

People Management

- HRI Employee Count Status KPI
- HRI Employee Count with Job Category Status KPI
- HRI Employee Separation Status KPI
- HRI Employee Separation with Job Category Status KPI
- HRI Workforce Headcount KPI
- HRI Workforce Headcount (Job Category) KPI
- HRI Workforce Full Time Equivalent (Job Category) KPI
- HRI Workforce Separation Full Time Equivalent by Rolling Month KPI
- HRI Workforce Separation Headcount by Rolling Month KPI

Recruiting and Hiring

- HRI Recruitment Success (Starts) Status KPI
- HRI Recruitment Success (Starts) with Job Category Status KPI

Use these KPIs to set target values for performance of your enterprise in these four areas. You can configure the performance management framework to send a notification when actual performance falls short of, or exceeds, the target value. For example, you may configure the performance management framework to send you a notification when workforce variance is greater than 10%, or when training success is below 50%.

Each KPI is processed by Oracle Alerts. The alerts run at predefined intervals to compare the actual performance against your target performance values. Where the target is exceeded, a workflow process then sends you the notification.

KPI Supporting Reports

Each KPI is associated with a supporting Performance Management Viewer (PMV) report that displays the current information relating to the KPI. The supporting PMV report compares the actual values with the KPI target values.

The following table indicates which reports support which KPIs:

KPIs and Supporting Reports

KPI Name	Report Name
HRI Salaries Varying From Grade Mid Point KPI	Salary to Grade Range Mid Point Variance
HRI Workforce Assignment Count Above Their Grade Mid Point KPI	Salary Distribution Within Grade Range
HRI Workforce Assignment Count Below Their Grade Mid Point KP	Salary Distribution Within Grade Range
HRI Training Attendance Status KPI	Internal Training Attendance KPI Status
HRI Training Attendance with Job Category Status KPI	Training Attendance with Job Category KPI
HRI Employee Count Status KPI	Employee Count KPI Status
HRI Employee Count with Job Category Status KPI	Employee Count with Job Category KPI
HRI Employee Separation Status KPI	Employee Separation KPI Status
HRI Employee Separation with Job Category Status KPI	Employee Separation with Job Category KPI
HRI Workforce Headcount KPI	Workforce Count KPI Status KPI
HRI Workforce Headcount (Job Category) KPI	Workforce Count Status (Job Category)
HRI Workforce Full Time Equivalent (Job Category) KPI	Workforce Count Status (Job Category)
HRI Workforce Separation Full Time Equivalent by Rolling Month KPI	Workforce Separation by Rolling Month – Status KPI
HRI Workforce Separation Headcount by Rolling Month KPI	Workforce Separation by Rolling Month – Status KPI
HRI Recruitment Success (Starts) Status KPI	Recruitment Success (Hires) KPI Status
HRI Recruitment Success (Starts) with Job Category Status KPI	Recruitment Success (Hires) with Job Category KPI Status

KPI Targets

To view the performance targets for your reports, select a business plan. When you set up your KPI, you can assign a business plan to a target. One business plan is linked to one KPI target. If you enter a business plan when running a PMV report, the associated target appears for each time period.

Targets only appear if the report parameters exactly match the KPI target dimensions. For example, if you have entered a region in the report parameters, the KPI must also have a region dimension.

The responsibility you are using to run the report must match the notification responsibility used in the KPI. If you are running the report using a responsibility that has not been used as a notification responsibility, then you cannot view the targets.

If you want to display targets on the report, do not select the Roll Up Organization parameter on the report. When you select Include Subordinate, the report includes information for all organizations within the hierarchy. Targets can only be for one organization. You can set up more than one target for the same organization or organization hierarchy, business plan, job, job category, budget measurement type, and time period. If you do this, the report uses the highest target value.

For information on using the Performance Management Framework with predefined KPIs, creating alerts, and defining targets, see: *Oracle E-Business Intelligence Performance Management Framework and Performance Management Viewer User Guide*

Frequency and Reporting Dates (HTML reports)

Many of the HTML reports include the following two fields:

- Frequency
- Reporting Dates

These fields enable you to report on information at a number of different points in time within one report.

For example, if you want to review two years, you could enter 01-Jan-2001 to 31-Dec-2002 in the Reporting Dates fields. You can then view the information at a number of points in this time period.

You enter how you want to divide the time period in the Frequency field.

For example, if you enter Year and the reporting dates 01-Jan-2002 to 31-Dec-2004, the reports calculate the workforce and salary for each of the following time periods:

- 01-Jan-2002 to 31-Dec-2002
- 01-Jan-2003 to 31-Dec-2003
- 01-Jan-2004 to 31-Dec-2004

The report uses the first day of the month that you enter as your Start Date in the first Reporting Date field. For example, if you enter 4-Jan-2000 as your intended start date, the report will use 1-Jan-2000.

The report uses the last day of the Frequency time period you enter in the Frequency field.

The report always includes the dates you enter in the parameters, even if these fall outside the frequency selected. For example, if you enter the reporting dates of 12-Jun-2001 and 20-Nov-2003, and the frequency of Year, the information for the report is taken from 01-Jun-2001 until 31-May-2004, as follows:

- 01-Jun-2001 to 31-May 2002
- 01-Jun-2002 to 31-May 2003
- 01-Jun-2003 to 31-May-2004

HR Management Page

The HR Management page displays Daily Business Intelligence reports for HRMS. The page provides a high-level summary of Human Resource measurements for the enterprise. To use this page you require the HR Line Manager or the Daily HR Intelligence responsibility.

To use this page effectively, you need to understand the following concepts:

Key Concepts

- **Top Line Manager**: This is the top manager of a hierarchy you select in the DBI Manager parameter.
- **Direct Reports**: Employees who report directly to the top line manager.
- **All**: Employees reporting to the top line manager.
- **Current Manager**: The manager for whom the row is displayed on the DBI report. The current manager reports to the Top Line Manager directly.
- **Reporting Period**: Days between prior period date and the effective date selected on the DBI page parameter.
- **Salary Conversion**: The salary for data points in the DBI salary trend graphs is based on the currency conversion rate as of the selected effective date. If you change the effective date to one of the previous data points on the graph, the salary for all data points will be based on the currency conversion rate as of the new effective date. Since the conversion rates could be different on each selected effective date, the salary shown on the salary trend graph for the same data points may differ for each selected effective date.

Parameters

The parameters on the DBI HR Management page determine what data you will see, to help you gather the most useful business information.

The following parameters are available:

- **Period Type:** You can select a period of Rolling 7 Days, Rolling 30 Days, Rolling 90 Days, or Rolling 365 Days. A rolling period type means that the report period ends at the Effective Date and starts at Effective Date minus Reporting Period plus 1 day. For example, if the date is 15-Aug-2004 and the period type is Rolling 30 Days, then the period start date will be 16-July-2004.

  Enter the effective date and select the Period Type to define the rolling period. The application calculates the start date as 7, 30, 90, or 365 days prior to the selected date depending on the Period Type.

  Where data is present in a report or graph, the Period Type you select affects the number of data points displayed in the graph:

  - **Rolling 7 Days:** displays 13 data points at 7 day intervals.
  - **Rolling 30 Days:** displays 12 data points at 30 day intervals.
  - **Rolling 90 Days:** displays 8 data points at 90 day intervals when compared to Prior Period, and displays 4 data points at 90 day intervals when compared to Prior Year.
  - **Rolling 365 Days:** displays 4 data points at 365 day intervals.

Note: The reports display the full number of data points for the selected Period Type only if you have collected the relevant data.

- **Compare To:** Use this parameter to compare values as of the date parameter to those either one period prior (using the Period Type parameter) or one year prior. Select a comparison type of Prior Year or Prior Period. If you select Prior Year, DBI reports with a Change column will reflect the change in the value compared to the value one calendar year ago. If you select Prior Period, reports with a Change column will reflect the change in the value compared to the same point in the previous period. So, if you have selected a period of Rolling 30 Days, Change columns will reflect the change compared to 30 days ago. Note that the prior period is not the same date in the previous period. If you compare 30 days the end of the previous period will be 31 days back.
- **Date:** The DBI date parameter determines the reporting date of the data displayed on the page. The default date for all the DBI pages is the current system date, but you can choose any date that is later than the global start date. The global start date is defined during DBI set up. For more information, see: *Daily Business Intelligence Implementation Guide* on Metalink (technical note number: 271413.1). The application displays the date information next to the date parameter. The details include the quarter, fiscal year, and the number of days remaining in the period. For example, if you enter 01-JAN-2003 as the date and select Rolling 90 Days as the Period Type, the date information would be Q4 FY03 Day -89.
- **Manager:** This parameter displays a list of people based on the Supervisor Hierarchy of the current user. It allows you to drill down from yourself to your subordinates. Each report then changes to reflect the manager you select.

  The list is indented to show the following levels:

  - Level 1 - The current user.
  - Level 2 - The manager currently selected in the HR Management page.
  - Level 3 - The direct reports of the manager selected in the HR Management page.
- **Currency:** The currency parameter determines the currency that is used to display monetary values. The DBI reports convert all the salaries to the reporting currency you select in the page parameter. The default currency for all pages is the primary global currency. For information on setting up currency details, see: *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink (technical note number: 271413.1).

Key Performance Indicators (KPIs)

The HR Management page provides KPIs that display a summary of workforce activity changes and salary changes in your enterprise. You can view the analytical data for the manager selected in the page parameter.

Using the KPIs you can gather the following information about the top line manager:

- Total headcount as of a point in time
- Total salary as of a point in time
- Average salary as of a point in time
- Total turnover for a selected reporting period

- Voluntary and involuntary turnover for a selected reporting period

The HR Management page provides the following KPIs:

- Total Headcount: This KPI is associated with the Headcount report, page 1-141. It calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy.
- Total Annualized Turnover: This KPI is associated with the Annualized Turnover Status report, page 1-140. It calculates the total annualized turnover in the reporting period for all employee assignments in the manager's hierarchy. You can also view the:
  - Annualized Voluntary Turnover change for the reporting period.
  - Annualized Involuntary Turnover change for the reporting period.
- Total Employee Salary: This KPI is associated with the Salary Status report, page 1-37. It calculates the total annualized salary at the effective date for all employee assignments in the manager's hierarchy. You can view the:
  - Average Salary change for the reporting period.

Leave and Absence Management Intelligence

Key Concepts for Leave and Absence Management Intelligence

To enable you to get the most out of Leave and Absence Management intelligence reports, you need to understand the following key concepts:

- Absence Hours, page 1-12
- Working Hours, page 1-12

Absence Hours

The Absence Hours reports use the element information created when you enter either an absence against the absence element, or an absence in the Absence Details window.

The report plots the absence hours for the date earned. This is entered for the element. If a date earned has not been entered, then the element's effective start date is taken as the date earned.

> **Note:** **Note:** If you have entered your absences using the Absence Details window, a date earned is not set up; therefore the report uses the effective start date of the element.

Regardless of the length of time an employee has been absent, the report always plots his or her absence hours on the date earned, or the effective start date of an element. It is possible, because of the frequency and time period you select, that an absence may fall into two different time periods. The absence hours are always shown in the first time period, rather than pro-rata across two time periods.

A pre-defined formula, TEMPLATE_BIS_DAYS_TO_HOURS, calculates the absence hours. You can configure this formula to meet your requirements. See Discoverer Workbooks Implementation Steps, *Deploy Strategic Reporting (HRMSi)*

Working Hours

Within Oracle HRMS, you record the number of regular and overtime hours worked using elements. The Hours Worked reports process information for the hours worked through formulas, which you must provide using Oracle FastFormula.

For more information, see Setting Up and Customizing Working Hours, *Deploy Strategic Reporting*.

The Hours Worked reports calculate the hours worked for each payroll time period using employee assignments. For the assignment to be included it must:

- Be active or suspended.
- Fit the criteria you enter. For example, if you enter a grade name, the assignment must have that grade entered against it.

> **Note:** You can only run the Hours Worked reports if you previously set up Oracle FastFormula to calculate your employees' regular hours and overtime hours.

The Hours Worked reports display information about the payroll periods that most closely match the start and end dates that you enter for the report. For example, if the first date you enter is 05-Jan-2001, and the payroll begins on 01-Jan-2001, the report includes information from 01-Jan-2001.

Absence Hours Report

This report investigates the absence hours recorded for employees in your enterprise. You can select the employees you want to run the report for by organization, location, job category, job, and grade. You can also run the report for the time period of your choice.

Business Questions

What is the absence record over time?

Report Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Location
- Job
- Grade
- Rollup Organizations (Yes/No)
- Frequency
- Reporting Dates

Related Topics

Absence Hours, page 1-12

Frequency and Reporting Dates (HTML reports), page 1-8

Employee Absence Hours (Organization Hierarchy) Trend Analytics Workbook

The Employee Absence Hours (Organization Hierarchy) Trend Analytics workbook investigates the absence hours recorded for employees in your enterprise over time. You can run the report for employees in a specific organization, location, job category, job, or grade. You can also run the report for the time period of your choice.

In order for an absence to appear in this report, you first need to link the Absence type to an Absence element.

The workbook plots the absence hours for the date earned that you have entered in the Payroll element. If no date earned exists, the workbook uses the element's effective start date as the date earned.

> **Note:** If you entered your absences using the Absence Details window, a date earned is not set up; therefore the report uses the effective start date of the element.

Regardless of the length of time an employee has been absent, the report always plots his or her absence hours on the date earned, or the effective start date of an element.

It is possible, because of the frequency and time period you select, that an absence may fall into two different time periods. The workbook always shows absence hours in the first time period, rather than distributed across two time periods.

Business Question

How does the absence record of people in my enterprise compare between organizations or jobs?

Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No

Use the following parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month

The worksheets display one row for each time period. For example, the Year worksheet displays one row per year.

Headings and Calculations

All worksheets contain the following columns:

- **Start Date:** The start date of the time period.

- **End Date:** The end date of the time period.
- **A time period column:** The heading depends on the selected worksheet, for example, in the by Year worksheet, this column is named "Year".
- **Absence Hours:** The absence hours incurred during the time period.

Related Topics

Absence Hours, page 1-12

Employee Hours Worked (Organization Hierarchy) Trend Analytics Workbook

The Employee Hours Worked (Organization Hierarchy) Trend Analytics workbook investigates the number of overtime and regular hours worked. The workbook displays the number of hours worked for each overtime band you use in your enterprise, such as double time or time-and-a-half.

Business Questions

How many regular hours are my people working, and how is this changing over time? How many overtime hours are my people working, and how is this changing over time? Am I paying too much in unplanned or poorly scheduled overtime?

Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Payroll Name – you can select multiple payrolls

Use the following parameters to further restrict the values in the workbook:

- Location (Geography)
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheet:

- By Payroll Period

The worksheet displays one row for each payroll period.

Headings and Calculations

The worksheet contains the following columns:

- **Period Start Date:** The start date of the payroll period.
- **Period End Date:** The end date of the payroll period.
- **Headcount:** Regular hours worked during the payroll period calculated as a headcount.
- **Fulltime Equivalent:** Regular hours worked during the payroll period calculated as Full Time Equivalent.
- **Overtime Band columns:** The number of overtime hours worked for the overtime band within each payroll period, with one column for each band you have included in Oracle FastFormula.

  See Setting Up and Customizing Working Hours, *Deploy Strategic Reporting*

Related Topics

Working Hours, page 1-12

Hours Worked Report

This report investigates the number of overtime and regular hours worked. The report displays the number of hours worked for each overtime band you use in your enterprise, such as double time or time-and-a-half. You can run the report for a selected time period.

Business Questions

How many hours have been worked over a number of periods?

Report Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job
- Grade
- Payroll
- Reporting Dates

Related Topics

Working Hours, page 1-12

Salary and Grade Related Pay and Progression Intelligence

Key Concepts for Salary and Grade Related Pay and Progression Intelligence

The Salary and Grade Related Pay and Progression Intelligence reports enable you to compare and contrast salaries among employees working in different circumstances, such as different jobs or organizations, within your enterprise. You can also examine salary trends, or you can view salary details for individual employees. You can set Key Performance Indicators to alert you to critical changes in salaries.

> **Note:** These reports will not return data if you have not attached your Grade Rates to a Salary Basis.

To enable you to get the most out of the Salary and Grade Related Pay and Progression intelligence reports, you need to understand the following key concepts:

- Salary Currencies, page 1-17
- Salary Annualization, page 1-17
- Grade Annualization, page 1-17
- Salaries and Assignments, page 1-17

Salary Currencies

The Salary and Grade Related Pay and Progression reports enable you to select the currency on which you want to report. If salaries exist that are not paid in the currency you select, you can include or exclude them from the report. If you include salaries that are not in the currency you select, the reports convert the salary using the general ledger (GL) daily rates. If the report cannot find a valid exchange rate, it ignores the salary.

For more information, see Entering A Conversion Rate Type, *Configuring, Reporting, and System Administration Guide*.

Salary Annualization

Most of the reports display salary values as annualized figures. Reports use the salary basis set up for the assignment to calculate the annualized figure. Reports only include the salary values they can convert to an annualized figure.

Grade Annualization

Reports display the minimum, mid-point, and maximum payments in a grade range as annualized figures. Reports use the grade annualization factor set up as part of the pay basis to calculate the annualized figure.

Salaries and Assignments

The Salary and Grade Related Pay and Progression reports show salaries for all assignments that satisfy the following criteria. For an assignment to be included in the reports, it must:

- Be active or suspended.

  Note: By including employees with a status of suspended, the reports ensure that employees on military leave, or those who have been temporarily suspended, are still included in the salary analysis.

- Have the latest approved salary proposal. Assignments with unapproved salary proposals are not included.
- Have all components of a salary increase approved for the Salary Component Trend report.
- Have a performance rating related to a current approved salary, if you group by performance for the Average Salary By Group report.
- Fit the criteria you enter. For example, if you enter a location, the assignment must be for that location.

Each assignment that matches the selection criteria appears on the report. If an employee has more than one assignment that matches all the criteria, the employee appears more than once on the report.

Assignments are shown on the day the report is run, except in the following HRMSi reports:

- Average Salary Trend report

  The report calculates the average salary on the last day of the frequency period. It calculates the average salary by totaling the salary for all relevant assignments, and dividing this value by the number of assignments.

- Salary Component Trend report

  The report calculates the amount attributed to the component reason for each frequency time period.

Average Salary By Group Report

Within your enterprise you have many different groups of employees. You can group employees by seven common criteria, as follows:

- Ethnic origin (or EEO category in the US)
- Grade
- Job
- Location
- Gender
- Performance
- Service band

This report enables you to investigate the average salaries of these different groups of employees. You can also select which area of your enterprise you want to investigate.

Note: This report does not support ethnic origin for the Singapore legislation. If your legislation is Singapore, this report will run, unless you view by Ethnic Origin.

Business Questions

How do salaries compare across members of a particular group?

Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job Category
- Job
- Grade
- View
- Reporting Currency
- Other Currencies (Include/Exclude)

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Average Salary Trend Report

This report reviews salary trends in different areas of your enterprise. It displays the average salary of all your employees who match the selection criteria. You can investigate the trends in average salaries for different organizations, jobs, grades, and locations. You can also choose the currency you want to view the salaries in, and include or exclude salaries that are not paid in your chosen currency.

Business Questions

How have average salaries changed over time?

Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job
- Grade
- Reporting Currency
- Other Currencies (Include/Exclude)
- Frequency

- Reporting Dates

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Frequency and Reporting Dates, page 1-8

Salary and Grade Range Report

Using Oracle HRMS you can define the minimum, mid points and maximum salaries for different grades in your enterprise. This report enables you to investigate how salaries relate to grade rates, including:

- Which employees are paid more than the maximum for their grade.
- Which employees are paid below the mid point or maximum for their grade and by how much.
- What would be the cost of increasing a group of employees to the mid point or maximum for their grade?

This report is particularly useful if you have set the midpoint at a recognized industry standard. You can then quickly see which employees are being paid below this standard and how much it will cost to raise salaries to the industry standard.

Business Questions

How do employee's salaries compare to their grade range?

Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job
- Grade
- Reporting Currency
- Other Currencies (Include/Exclude)

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Salary Component Trend Report

The amount your enterprise spends on salaries is likely to change over time. Oracle HRMS enables you to record a reason for each salary increase you give to an employee. Use the Salary Component Trend report to investigate the total cost of salary changes for each change component you have identified. For example, you can determine what is the total cost from January 1999 to January 2000 of salary changes attributed to cost of living.

You can investigate the salaries changes by components for different organizations, jobs, grades, and locations. You can also choose the currency you want to view the salaries in and include or exclude salaries that are not paid in your chosen currency.

Business Questions

What is the cost of a particular salary component and how is it changed over time?

Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job
- Grade
- Reporting Currency
- Other Currencies (Include/Exclude)
- Frequency
- Reporting Dates

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Frequency and Reporting Dates, page 1-8

Salary Spread Report

Within your enterprise it is useful to know the salary ranges for different groups of employees. This report investigates the spread of salaries by four different criteria:

- Age (in years)
- Length of service (in years)
- Grade
- Performance Rating

Employees, within the area of the enterprise you select, have their salary plotted against either age, length of service, grade or performance. You can then quickly see where the main spread of salaries lie for each group.

Business Questions

What range of salaries do employees have in a particular group?

Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job
- Grade
- Performance Rating
- View By
- Reporting Currency
- Other Currencies (Include/Exclude)

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Employee Salary (Organization Hierarchy) Trend Analytics Workbook

The Employee Salary (Organization Hierarchy) Trend Analytics workbook lists the average salaries of employees, within a given date range, for time periods such as year, semi-year, month, bi-month, and quarter. Each worksheet represents the average salaries for one specific time period.

You can select which area of your enterprise you want to investigate. You can also choose the currency you want to view the salaries in and include or exclude salaries that you pay in a different currency.

Business Questions

Are average salaries in my enterprise rising at a faster rate now than in previous time periods?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Convert to Currency

  The workbook converts the salaries to the currency you select here, before averaging them for the grouping

Use the following parameters to further restrict the values in the workbook:

- Area

- Country
- Region
- Location
- Job
- Grade
- Position
- Performance Rating
- Include Currencies

Worksheets

This workbook has the following worksheets:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month
- By Year and Organization
- By Quarter and Organization
- By Month and Organization

The worksheets display one row for each time period. For example, the by Year worksheet displays one row per year. The three reports that include Organization break the data down even further. For example, the by Month and Organization worksheet displays one row for each month per organization.

Headings and Calculations

All worksheets contain the following columns:

- **A time period column**

  This heading depends on the selected worksheet, for example, in the by Year worksheet, this column is named "Year".

- **Organization**

  One column for each sub-organization – appears only in the three worksheets that break the report down into time period and organization.

- **Date**

  The date corresponding to the start of each time period.

- **Total Salary**

  The total salary for each time period and organization.

- **Average Salary**

The average annualized salary per time period– appears only in the five worksheets that do not break the report down into sub-organizations.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Employee Salary Component (Organization Hierarchy) Trend Analytics Workbook

The amount your enterprise spends on components of salaries is likely to change over time. Oracle HRMS can record a reason for each salary increase you give to an employee.

Use the Employee Salary Component (Organization Hierarchy) Trend Analytics workbook to investigate the cost of salary changes for each change component over different time periods. For example, you can determine what proportion of total salary changes for January 1999 to January 2000 is attributable to the cost of living. You can view the changes over different time periods, such as monthly, bi-monthly, and yearly.

You can investigate the salary changes by components for different organizations, jobs, grades, locations, and salary component reasons. You can also choose the currency you want to view the salaries in and include or exclude salaries that you pay in a different currency.

Business Questions

What is the cost of a particular salary component and how has it changed over time?

When do salary proposals occur, and how do they break down into the salary components?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Convert to Currency

  The workbook converts the salaries to the currency you select here, before averaging them for the grouping

Use the following parameters to further restrict the values in the workbook:

- Location
- Job Category
- Job
- Grade
- Position

- Salary Component Reason
- Include Currencies

Worksheets

This workbook has the following worksheets:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month

The worksheets display one row for each time period. For example, the by Year worksheet displays one row per year.

A Total row displays the cost of each salary component reason within the selected start and end dates.

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **A time period column**

  This heading depends on the selected worksheet, for example, in the by Quarter worksheet, this column is named "Quarter".

- **Salary component reason columns**

  One column for each defined salary component reason – the total cost of the salary component for each time period.

- **Blank**

  The total cost of salary components with no associated reason for each time period.

- **Total**

  The total cost of all salary components for each time period.

  If no salary proposals occurred in a specific time period, a row for that time period does not appear.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Employee Salary and Grade Range (Organization Hierarchy) Detail Analytics Workbook

Using Oracle HRMS you can define the minimum, mid points and maximum salaries for different grades in your enterprise.

This workbook is particularly useful if you set the midpoint at a recognized industry standard. You can then quickly see if any employees receive less than the standard salary, and how much it will cost to raise salaries to the industry standard.

You can also choose the currency you want to view the salaries in and include or exclude salaries that you pay in a different currency.

Business Questions

Which employees are paid more than the maximum for their grade?

Which employees are paid below the mid point or maximum for their grade and by how much?

What would be the cost of increasing a group of employees to the mid point or maximum for their grade?

Workbook Parameters

You must enter a value for the following parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Convert to Currency

  The workbook converts the salaries to the currency you select here, before averaging them for the grouping

Use the following parameters to further restrict the values in the workbook:

- Location
- Job
- Grade
- Position
- Include Currencies

Worksheets

This workbook has the following worksheets:

- Full Details
- Graph

Full Details Worksheet

The Full Details worksheet compares employees' current salaries to their grade minimum, mid, and maximum points, and displays the value required for the employee's salary to reach the next point in the grade. It also includes details of employees' organization, location, job, and position.

The worksheet displays one row for each employee. It also includes a row totaling salaries, To Min values, To Mid values, and To Max values.

Business Questions

What is the position of employee salaries in relation to their grade minimum, mid, and maximum points?

Worksheet Headings and Calculations

The table displays the following columns:

- **Grade**

  The employee's current grade.

- **Person**

  The employee's name.

- **Salary**

  The employee's current salary.

- **Grade Min**

  The minimum salary for the grade

- **To Min**

  If the employee's salary is less than the grade minimum, displays the difference between the two. This could occur if grade rates change, leaving the salary of an employee below the new grade minimum.

- **Grade Mid**

  The mid salary for the grade

- **To Mid**

  If the employee's salary is less than the grade mid point, displays the difference between the two.

- **Grade Max**

  The maximum salary for the grade

- **To Max**

  If the employee's salary is less than the grade maximum, displays the difference between the two.

- **Organization**

  The employee's organization.

- **Location**

  The employee's location.

- **Job**

  The employee's job.

- **Position**

  The employee's position.

Graph Worksheet

The Graph worksheet displays a table and a chart that compare each employee's salary to the minimum, mid, and maximum points for their grade.

The table displays one row for each employee.

Business questions

What is the position of employee salaries in relation to their grade minimum, mid, and maximum points?

Worksheet Headings and Calculations

The table data reflects the data displayed in the chart. It displays the following columns, which match the bars in the chart:

- **Person**

  The employee's name.

- **Below Min**

  The grade minimum value.

- **Min to Mid**

  The difference between the grade minimum and grade mid-point values.

- **Mid to Max**

  The difference between the grade mid-point and grade maximum values.

Chart

The worksheet chart has a horizontal axis that shows values ranging from 0.00k to 100.00k. These values reflect the currency you select in the workbook parameters.

> **Note:** If you need to report on salaries outside of this range you can configure the Y1 axis and the Y2 axis of this worksheet using Discoverer Java Edition. You should ensure the Y1 axis and the Y2 axis remain equal in order to accurately plot the employee salaries against their grade.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Employee Salary by Group (Organization Hierarchy) Status Analytics Workbook

Within your enterprise you have many different groups of employees. You can group employees by common criteria, such as ethnic origin, grade, job, gender, and service band.

This workbook enables you to investigate the average salaries of these different groups of employees.

You can also select which area of your enterprise you want to investigate. You can choose the currency you want to view the salaries in and include or exclude salaries that you pay in a different currency.

Business Questions

Are average salaries in my enterprise rising at different rates for different groups of people in my enterprise?

How do salaries vary between different ethnic groups?

Workbook Parameters

You must enter a value for the following parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Convert to Currency

  The workbook converts the salaries to the currency you select here, before averaging them for the grouping

Use the following parameters to further restrict the values in the workbook:

- Location
- Job Category
- Job
- Grade
- Position
- Include Currencies

Worksheets

The workbook has the following worksheets, each representing a salary grouping:

- By Organization
- By Location
- By Job
- By Grade
- By Position
- By Performance Rating
- By Length of Work Band
- By Age Band
- By Gender
- By US Ethnic Group
- By GB Ethnic Group

The worksheets display one row for each grouping. For example, the by Position worksheet displays one row per position.

When you use the US Ethnic Group worksheet, or the GB Ethnic Group worksheet, employees from other countries will appear in the report with no ethnic group recorded against them. These employees will be counted as a separate group. To avoid this, you could restrict the report to just employees in the US or GB.

Headings and Calculations

All worksheets contain the following columns

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Length of Work Band worksheet, this column is named “Length of Work Band”

- **Average Salary**

  The current average annualized salary per grouping.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Employee Salary by Job and Grade Status Workbook

This workbook enables you to compare employee salaries for each job and grade. The worksheet shows the average, minimum, and maximum employee salaries for jobs and grades.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to compare employee salaries for each job and grade. The report shows the average, minimum, and maximum employee salaries for jobs and grades, for a given organization and its subordinate organizations.

Business Questions

How do the lowest, average and highest salaries of employees in each organization, in a particular job, compare with the grade minimum, mid point and maximum?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

The worksheet includes those employees who held a primary assignment at the time of the Effective Date, and were employed within the selected organization hierarchy at the time of the Effective Date.

Headings and Calculations

This report uses the following calculations:

- **Annualized Grade Maximum**

  Calculates the annualized maximum payment in a grade range. The calculation uses the grade annualization factor that is set up as part of the pay basis.

- **Annualized Grade Mid Value**

  Calculates the annualized mid value payment in a grade range. The calculation uses the grade annualization factor that is set up as part of the pay basis.

- **Annualized Grade Minimum**

  Calculates the annualized minimum payment in a grade range. The calculation uses the grade annualization factor that is set up as part of the pay basis.

- **Number of incumbents**

  This returns the total number of assignments for an employee on the effective date.

Supervisor Hierarchy Worksheet

This worksheet enables you to compare employee salaries for each job and grade. The worksheet shows the average, minimum, and maximum employee salaries for jobs and grades, for a given supervisor and his/her subordinates.

Business Questions

How do the lowest, average and highest salaries of employees for a given supervisor, in a particular job, compare with the grade minimum, mid point and maximum?

Parameters

You must specify values for the following parameters:

- Supervisor
- Effective Date

The worksheet includes those employees who held a primary assignment at the time of the Effective Date, and were assigned to the selected supervisor at the time of the Effective Date.

Headings and Calculations

This report uses the following calculations:

- **Annualized Grade Maximum**

  Calculates the annualized maximum payment in a grade range. The calculation uses the grade annualization factor that is set up as part of the pay basis.

- **Annualized Grade Mid Value**

Calculates the annualized mid value payment in a grade range. The calculation uses the grade annualization factor that is set up as part of the pay basis.

- **Annualized Grade Minimum**

  Calculates the annualized minimum payment in a grade range. The calculation uses the grade annualization factor that is set up as part of the pay basis.

- **Number of incumbents**

  This returns the total number of assignments for an employee on the effective date.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Employee Salary Spread (Organization Hierarchy) Detail Analytics Workbook

Within your enterprise it is useful to know the salary ranges for different groups of employees. This workbook investigates the spread of salaries within groups such as age, position, grade, organization and location.

Employees, within the area of the enterprise you select, have their salary plotted against a group. You can then quickly see where the main spread of salaries lie for each group.

Business Questions

What range of salaries do employees have in a particular group?

How do salaries vary across age groups?

How do salaries vary across organizations or locations?

To what extent do salaries increase with length of service?

Workbook Parameters

You must enter a value for the following parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Convert to Currency

  The workbook converts the salaries to the currency you select here, before averaging them for the grouping

Use the following parameters to further restrict the values in the workbook:

- Location
- Job
- Grade
- Position
- Performance Rating

- Include Currencies

Worksheets

The workbook has the following worksheets, each representing a salary grouping:

- By Organization
- By Location
- By Job
- By Grade
- By Position
- By Performance Rating
- By Age
- By Length of Service

The worksheets display one row for each person. Age and Length of Service are measured in years.

Headings and Calculations

All worksheets contain the following columns

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Grade worksheet, this column is named “Grade”.

- **Person**

  Employee names listed within each grouping.

- **Total Salary**

  Displays the employee’s total annualized salary for all assignments Each employee appears in the worksheet grouping.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Salary Survey Comparison Workbook

The Salary Survey Comparison Workbook provides information on salary surveys linked to jobs and positions. It enables you to analyze salary information per job or position.

Worksheets

This workbook has the following worksheets:

- Salary Survey Mappings

Salary Survey Mappings Worksheet

This worksheet enables you to analyze salary surveys, which have been mapped to particular jobs or positions.

Business Questions

What are the details of salary surveys?

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 1-17

Salary Distribution Within Grade Range KPI PMV Report

The Salary Distribution Within Grade Range KPI PMV report provides a view of the following KPIs:

- HRI Workforce Assignment Count Above Grade Mid Point KPI, page 1-35
- HRI Workforce Assignment Count Below Grade Mid Point, page 1-35

Report Parameters

You must specify values for the following parameters:

- Organization
- View by (Organization, Location, Grade, Job, or Position)
- Business Plan

You can use the following optional parameters to further restrict the report:

- Grade
- Location
- Job
- Position

Salary Distribution Within Grade Range KPI PMV Report

The Salary to Grade Mid Point Variance Status KPI PMV report provides a view of the following data:

- HRI Salaries Varying From Grade Mid Point KPI, page 1-35

Report Parameters

You must specify values for the following parameters:

- Organization
- View by (Organization, Location, Grade, Job, or Position)
- Business Plan
- Grade

You can use the following optional parameters to further restrict the report:

- Job
- Position
- Location

HRI Salaries Varying From Grade Mid Point KPI

This KPI reports on the average variance of employees' salaries from the salary mid-point for their grade. It answers the following business question:

Tell me when the average difference between workforce salaries and their grade mid-point is outside a target percentage range.

Related Topics

Key Performance Indicators – Key Concepts, page 1-5

HRI Workforce Assignment Count Above Grade Mid Point KPI

This KPI reports on salaries for workforce assignments that are above the grade mid-point for the salary grade. It answers the following business question:

Tell me when the percentage of workforce assignment salaries that are above the grade mid-point for the salary, is outside the target percentage.

Related Topics

Key Performance Indicators – Key Concepts, page 1-5

HRI Workforce Assignment Count Below Grade Mid Point KPI

This KPI reports on salaries for workforce assignments that are below the grade mid-point for the salary grade. It answers the following business question:

Tell me when the percentage of workforce assignment salaries that are below the grade mid-point for the salary, is outside the target percentage.

Related Topics

Key Performance Indicators – Key Concepts, page 1-5

Headcount and Salary Detail

You access this report from the Total Salary column in the Salary by Job Family Status report.

This report lists the employees and their salary that comprise the Total Salary value you drilled from. This report displays the salaries in both their local currency and in the DBI primary or the global currency.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

This report includes the following headings:

- **Name:** The employee's name.
- **Manager:** The employee's current manager.
- **Department:** The employee's current organization.
- **Country:** The employee's country, based on the assignment location.
- **Job:** The employee's job title.
- **Local Salary:** The employee's annualized salary in their local currency. Two columns show the salary value and the local currency code.
- **Global Salary:** The employee's annualized salary in the enterprise global currency. Two columns show the salary value and the global currency code.
- **Length of Service (Years):** This will be the employee's last period of service, excluding all previous periods of service. For example, if an employee works for 5 years from 1990 to 1995, then leaves the enterprise, and returns to work between 1997 and 1999, the application considers the last period of service of 2 years as the length of service. The application displays the length of service (period between the hire date and the end date) for a person and not the period of different assignment/s that the person holds.

Headcount and Salary Trend

This report shows changes in headcount and salaries over time for the selected top line manager.

The report displays the total employee headcount and salary for all subordinates of the top line manager and excludes the top line manager from the total.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

There are no calculations in this report.

Headcount and Salary by Country

This report displays the total employee headcount, percentage headcount change, average salary and percentage average salary change for the countries with the highest headcount for the selected manager. It may also display an extra row of Others that displays totals for any additional countries in which the manager may have subordinates, or for where the manager has subordinates without any assigned location.

The report first sorts the top eight countries by the total employee headcount, then by the average salary, and finally by the alphabetical order of the country code for the top line manager. The Grand Total value displays the total for the manager selected in the Manager parameter.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

This report includes the following calculations:

- **Headcount:** Displays the total headcount by country for the top line manager as of the reporting date selected on page parameters.
- **Change (Headcount):** The percentage change in headcount between the start and end of the reporting period. This is calculated as:

  (Current Headcount - Previous Headcount)/Previous Headcount * 100

  If you select a comparison type of Prior Period in the Compare To parameter, the Previous Headcount is the headcount 7, 30, 90, or 365 days prior to your selected date, depending on the Period Type you have selected.

  If you select a comparison type of Prior Year, the Previous Headcount is the headcount a year prior to your selected date.
- **Average Salary:** The average salary paid to employees reporting to the top line manager by country as of the reporting date.
- **Change (Average Salary):** The percentage change in average salary between the start and end of the reporting period. This is calculated as:

  (Current Average Salary - Previous Average Salary)/Previous Average Salary * 100

  If you select a comparison type of Prior Period in the Compare To parameter, the Previous Average Salary is the average salary 7, 30, 90, or 365 days prior to your selected date, depending on the Period Type you have selected.

  If you select a comparison type of Prior Year, the Previous Average Salary is the average salary a year prior to your selected date.

Salary

The Salary report displays the employee total salary, average salary and salary change percent of all direct reports of the selected top line manager.

The report displays one row for each direct report of the top line manager, if that direct report has at least one subordinate. The Salary report also displays one row for the direct reports.

The Total Salary column displays the total salary for each direct report for your selected date. This value includes the salaries of all the subordinates of the direct report line manager, but excludes the salary of the direct report line manager. The report includes only salaries allocated to employee from the assignment Salary Administration. The report converts all the salaries to the currency you selected in the Currency parameter. The Grand Total value displays the total for the manager selected in the Manager parameter.

Drill reports are available from the values in the Total Salary column to enable you to view salaries by Job Function and Job Family.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

This report includes the following headings and calculations:

- **Manager:** The employee's current manager.
- **Total Salary:** The total salary paid to employees reporting to the top line manager by country as of the reporting date. You can access the Salary by Job Function Status report, page 1-38 available from the Total Salary column values.
- **Change (Total Salary):** The percentage change in total salary between the start and end of the reporting period. This is calculated as:

  (Current Total Salary - Previous Total Salary)/Previous Total Salary * 100
- **Average Salary:** The average salary paid to employees reporting to the top line manager by country as of the reporting date. This is calculated as:

  Total Salary/Total Headcount
- **Change (Average Salary):** The percentage change in average salary between the start and end of the reporting period. This is calculated as:

  (Current Average Salary - Previous Average Salary)/Previous Average Salary * 100

  If you select a comparison type of Prior Period in the Compare To parameter, the Previous Average Salary is the average salary 7, 30, 90, or 365 days prior to your selected date, depending on the Period Type you have selected.

  If you select a comparison type of Prior Year, the Previous Average Salary is the average salary a year prior to your selected date.

Salary by Job Function Status

You can access this report from the Total Salary column in the parent Salary report. This report is similar to the Salary report, except that it presents a view of the selected manager's employees by job function.

> **Note:** You need to set up the Job key flexfield and perform profile changes to use the Job Family Status report and the Job Function Status report. If you do not perform this setup the reports will work, but you will not see a breakdown of job functions and job families. For more information, see: Setting Up the Job Hierarchy, *Daily Business Intelligence for HRMS Implementation Guide*

The report displays the same columns as the Salary report, except that Job Function replaces Manager.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

This report includes the following calculations:

- **Job Function:** This column lists the job functions in which the selected manager has headcount. You can access the Salary by Job Family Status report, page 1-39 available from the Job Function column names.
- **Headcount:** The total headcount by job function as of the reporting date.
- **Total Salary:** The total salary paid to employees reporting to the top line manager by job function as of the reporting date.
- **Change (Total Salary):** The percentage change in total salary between the start and end of the reporting period. This is calculated as:

  (Current Total Salary - Previous Total Salary)/Previous Total Salary * 100
- **Average Salary:** The average salary paid to employees reporting to the top line manager by job function as of the reporting date.
- **Change (Average Salary):** The percentage change in average salary between the start and end of the reporting period. This is calculated as:

  (Current Average Salary - Previous Average Salary)/Previous Average Salary * 100

  If you select a comparison type of Prior Period in the Compare To parameter, the Previous Average Salary is the average salary 7, 30, 90, or 365 days prior to your selected date, depending on the Period Type you have selected.

  If you select a comparison type of Prior Year, the Previous Average Salary is the average salary a year prior to your selected date.

Salary by Job Family Status

You can access this report from the Job Function names in the Salary by Job Function report.

This report is similar to the Salary report, except that it presents a view of the selected manager's employees by job family.

> **Note:** You need to set up the Job key flexfield and perform profile changes to use the Job Family Status report and the Job Function Status report. If you do not perform this setup the reports will work, but you will not see a breakdown of job functions and job families. For more information, see: Setting Up the Job Hierarchy, *Daily Business Intelligence for HRMS Implementation Guide*

The report displays the same columns as the Salary report, except that Job Family replaces Manager. The report is similar to the Salary report except that it presents a view of the selected manager's employees by job family for a particular job function or job functions.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

This report includes the following heading and calculations:

- **Job Family:** This column lists the names of the current manager's job families that are within the selected job function.
- **Headcount:** The total headcount by job family as of the reporting date.
- **Total Salary:** The total salary paid to employees reporting to the top line manager by job family as of the reporting date. You can access the Headcount and Salary Detail report , page 1-35 available from the Total Salary column values.
- **Change (Total Salary):** The percentage change in total salary between the start and end of the reporting period. This is calculated as:

  (Current Total Salary - Previous Total Salary)/Previous Total Salary * 100
- **Average Salary:** The average salary paid to employees reporting to the top line manager by job family as of the reporting date.
- **Change (Average Salary):** The percentage change in average salary between the start and end of the reporting period. This is calculated as:

  (Current Average Salary - Previous Average Salary)/Previous Average Salary * 100

  If you select a comparison type of Prior Period in the Compare To parameter, the Previous Average Salary is the average salary 7, 30, 90, or 365 days prior to your selected date, depending on the Period Type you have selected.

  If you select a comparison type of Prior Year, the Previous Average Salary is the average salary a year prior to your selected date.

Organization Structures Intelligence

Organization Workforce Report

This HTML report investigates the performance of your organizations as measured by the increase and decrease in workforce over a selected time period.

To investigate the workforce changes for a particular organization, click on the organization name in the report table to access the Workforce Summary Analysis report, page 1-137.

Business Questions

Tell me about changes in my workforce throughout my organization.

Report Parameters

This report has the following mandatory parameters:

- Organization
- Rollup Organizations (Yes/No)
- Budget Measurement Type
- Display

  Use this parameter to control how the report displays your data.
- Order By
- Reporting Dates

Report Key Concepts

You should be aware of the following concepts when interpreting this report:

Separation Variance

When investigating variance in workforce using the Organization Workforce report, the total workforce that exists on the start and end dates is calculated for each organization on which you report. The total amount of workforce lost is the difference between the total workforce at the start and end dates of the time period you are interested in. An assignment is not counted as a loss if your employee's assignment starts and ends within the time period.

Report Headings and calculations

This report uses the following calculations:

Total Workforce Calculation

The report calculates the total workforce that exists on the start and end dates for each organization defined by the parameters. The report only includes active assignments that meet the selection criteria.

To calculate the absolute workforce for each organization, the report subtracts the amount of workforce at the start date from the amount of workforce at the end date.

Employment Agreements and Legal Compliance Intelligence (U.S.)

Employee Equal Opportunity by Job (United States Specific) Comparison Workbook

This workbook enables you to report on employee primary assignments (male, female, total) for your reporting establishments by ethnic origin, location, organization, and job name.

Worksheets

This workbook has the following worksheets:

- By Establishment Hierarchy
- By Organization Hierarchy

By Establishment Hierarchy Worksheet

The Establishment Hierarchy worksheet enables you to report on the number of employee primary assignments (male, female, total) for your reporting establishments by ethnic origin, location, and job name.

Business Questions

Show me the distribution of my employees within each establishment by ethnic origin, gender, work location, and job.

Parameters

You must specify values for the following parameters:

- Establishment Hierarchy
- Top Establishment
- Effective Date

The report includes employees who have a primary assignment within the selected establishment hierarchy on the selected Effective Date.

Headings and Calculations

This worksheet uses the following calculations:

- **Male**

  This calculation returns 1 if an assignment is for a male and 0 if an assignment is for a female.

- **Female**

  This calculation returns 1 if an assignment is for a female and 0 if an assignment is for a male.

By Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on the number of employee primary assignments (male, female, total) for your reporting establishments by ethnic origin, organization and job name

Business Questions

Show me the distribution of my employees within each organization by ethnic origin, gender, work location, and job.

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

The report includes employees who have a primary assignment within the selected organization hierarchy during the period on the selected Effective Date.

Headings and Calculations

This worksheet uses the following calculations:

- **Male**

  This calculation returns 1 if an assignment is for a male and 0 if an assignment is for a female.

- **Female**

  This calculation returns 1 if an assignment is for a female and 0 if an assignment is for a male.

People, Budgets and Costing Intelligence

Key Concepts for People Budgets and Costing Intelligence

The following concepts enable you to accurately interpret the results of the People Budgets and Costing intelligence reports:

- Workforce Count, page 1-44
- Position Control Budgets, page 1-44

Workforce Count

One of the most powerful features of the People Budgets and Costing reports is that you can define how the reports count workforce.

Workforce does not necessarily have to be a count of the number of people in your enterprise; it can instead be a count of the assignments and any budget measurement type you have set up. For example, you can count workforce using the budget measurement types of FTE or Headcount.

Additionally, by writing your own formula, using Oracle FastFormula, or the provided formula, you can instruct the report to count workforce exactly how you want to.

See: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Position Control Budgets

HRMSi reports on two types of budgets:

- Position Control
- Non-Position Control

For information on Position Control budgets see Position Control, *Oracle HRMS Enterprise and Workforce Management Guide*

Employee Budget Trend Workbook

This workbook investigates the difference between budgeted workforce and actual numbers of employees working for your enterprise, across organizations, jobs, grades, and positions.

The worksheets report on previous controlled budgets, as well as current ones.

The Open Budgets worksheet shows all open budgets irrespective of organization, job, grade, or position.

Worksheets

This workbook has the following worksheets:

- Open Budgets
- By Organization
- By Job

- By Grade
- By Position

Workbook Parameters

Before you run the worksheets, you must specify values for the following parameters:

- Business Group
- Budget Name

Key Concepts

The following concepts enable you to accurately interpret the results of this workbook:

Budget Elements

When you set up a budget you can link it to an organization, job, position, or grade.

The Employee Budget Status workbook uses a different budget element for each worksheet.

- Only budgets that have the correct element are included in the worksheet.

  For example, the Position Budget worksheet only includes budgets that have a position, and the Grade Budget worksheet only includes budgets that have grades.

- The worksheets count all assignments for the element at each element level.

  For example, the Job Budget worksheet includes all assignments for a job regardless of the organization, position, or grade.

  > **Note:** Ensure that you do not have rollup budgets set up, as they will be included in the totals. For example, consider the following budgets for the Sales West organization:
  >
  > - Sales West Grade 1 budget
  >
  >   Budget Value = 10
  >
  > - Sales West Grade 2 budget
  >
  >   Budget Value = 15
  >
  > If you had set up a rollup budget for Sales West, with a budget value of 25, combining the budget values for Grade 1 and 2, the workbook would calculate the budget value for Sales West as 50.

Headings and Calculations

The report uses the following calculations:

- **Workforce Variance**

  Populates the Workforce Variance column with the variance between the actual and planned workforce values.

- **Workforce variance ratio**

  Populates the workforce variance ratio column, by dividing the workforce variance by the planned workforce value.

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 1-44

Employee Budget Status Workbook

This workbook investigates the difference between budgeted workforce and actual numbers of employees working for your enterprise, for a specific organization, job, grade, or position.

The worksheets report on previous controlled budgets, as well as current ones.

Worksheets

This workbook has the following worksheets:

- Organization Budget
- Job Budget
- Grade Budget
- Position Budget

Workbook Parameters

Before you run the worksheets, you must specify values for the following parameters:

- Business Group
- Budget Name
- Budget Version
- Organization / Job / Grade / Position (depending on which worksheet you run)

Key Concepts

The following concepts enable you to accurately interpret the results of this workbook:

Budget Elements

When you set up a budget you can link it to an organization, job, position, or grade.

The Employee Budget Status workbook uses a different budget element for each worksheet.

- Only budgets that have the correct element are included in the worksheet.

  For example, the Position Budget worksheet only includes budgets that have a position, and the Grade Budget worksheet only includes budgets that have grades.

- The worksheets count all assignments for the element at each element level.

  For example, the Job Budget worksheet includes all assignments for a job regardless of the organization, position, or grade.

  Note: Ensure that you do not have rollup budgets set up, as they will be included in the totals. For example, consider the following budgets for the Sales West organization:

  - Sales West Grade 1 budget

Budget Value = 10

- Sales West Grade 2 budget

  Budget Value = 15

If you had set up a rollup budget for Sales West, with a budget value of 25, combining the budget values for Grade 1 and 2, the workbook would calculate the budget value for Sales West as 50.

Headings and Calculations

The report uses the following calculations:

- **Workforce Variance**

  Populates the Workforce Variance column with the variance between the actual and planned workforce values.

- **Workforce variance ratio**

  Populates the workforce variance ratio column, by dividing the workforce variance by the planned workforce value.

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 1-44

Employee Budget (Non-Position Control) Analysis Workbook

This workbook investigates the difference between budgeted workforce and actual numbers of employees working for your enterprise, for a specific organization, job, grade, or position.

The workbook reports on current non-position controlled budgets only.

Worksheets

This workbook has the following worksheets:

- Budget by Organization
- Budget by Job
- Budget by Grade
- Budget by Position

Workbook Parameters

Before you run the worksheets, you must specify values for the following parameters:

- Business Group
- Budget Name
- Budget Version
- Organization / Job / Grade / Position (depending on which worksheet you run)

Key Concepts

The following concepts enable you to accurately interpret the results of this workbook:

Budget Elements

When you set up a budget you can link it to an organization, job, position, or grade.

The Employee Budget Status workbook uses a different budget element for each worksheet.

- Only budgets that have the correct element are included in the worksheet.

  For example, the Position Budget worksheet only includes budgets that have a position, and the Grade Budget worksheet only includes budgets that have grades.

- The worksheets count all assignments for the element at each element level.

  For example, the Job Budget worksheet includes all assignments for a job regardless of the organization, position, or grade.

  Note: Ensure that you do not have rollup budgets set up, as they will be included in the totals. For example, consider the following budgets for the Sales West organization:

  - Sales West Grade 1 budget

    Budget Value = 10

  - Sales West Grade 2 budget

    Budget Value = 15

  If you had set up a rollup budget for Sales West, with a budget value of 25, combining the budget values for Grade 1 and 2, the workbook would calculate the budget value for Sales West as 50.

Headings and Calculations

The report uses the following calculations:

- **Workforce Variance**

  Populates the Workforce Variance column with the variance between the actual and planned workforce values.

- **Workforce variance ratio**

  Populates the workforce variance ratio column, by dividing the workforce variance by the planned workforce value.

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 1-44

Employee Budget (Non-Position Control) Trend Report

This report compares the number of employees you have budgeted for against the number of employees that actually exists. The report enables you to review all the organizations within a budget. You can select the time period you want to analyze.

This report covers current non-position controlled budgets only.

Note: This report enables you to investigate budget information for organizations. It does not include budget values that are not linked to an organization.

Business Questions

How do my non-position controlled employee budgets compare with actual employee numbers?

Report Parameters

Before you run the report, you must specify values for the following parameters:

- Budget
- Reporting Dates

  Since this report covers current budgets, you should enter the current date, or later, for the reporting end date.

Key Concepts

The following concepts enable you to accurately interpret the results of this report:

Budget Elements

When you set up a budget you can link it to an organization, job, position, and grade. This report calculates budget information at the organization level. The report counts all assignments for the organization regardless of their job, position, or grade. However, the report only includes budgets that have an organization set up against them.

For example, consider the following budgets for the Sales West organization:

- Sales West Grade 1 budget

  Budget Value = 10
- Sales West Grade 2 budget

  Budget Value = 15

The report ignores the grade element and displays the value for the organization Sales West as 25.

Note: Ensure that you do not have rollup budgets set up, as the report includes them in the report and workbook totals. Using the above example again, if you had set up a rollup budget for Sales West, with a budget value of 25, combining the budget values for Grade 1 and 2, both the report and the workbook would calculate the budget value for Sales West as 50.

Budget Versions

When you run this report, you select a budget. If more than one version of the budget exists, the report only displays information for the version that is effective at today's date. Use the Employee Budget Status workbook if you want to select a specific version of a budget.

Budget Time Periods

This report enables you to investigate budgets within a specific time period. If you enter a time period, the report includes all the information for the calendar month at the start and end of the period. For example, if you enter 21-Jan-1998 to 21-Nov-1998, the report includes information from 01-Jan-1998 to 30-Nov-1998. Use the Employee Budget Status workbook if you want to view all the budget periods for a particular budget without entering a time period.

Headings and Calculations

The report uses the following calculations:

Budget Value

The report counts the budget value for each organization included in the budget. If an organization is used more than once within a budget, the report adds all the budget values together to produce a budget value.

Workforce variance

The report calculates workforce variance using the budget measurement type of the budget version; and using the workforce figures for the last day of the time period you have entered. The calculation is as follows:

Workforce Variance = Workforce Actual - Workforce Budgeted

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 1-44

Employee Budget Trend Report

This report compares the number of employees you have budgeted for against the number of employees that actually exists. The report enables you to review all the organizations within a budget. You can select the time period you want to analyze.

This report covers current position controlled budgets only.

> **Note:** This report enables you to investigate budget information for organizations. It does not include budget values that are not linked to an organization.

Business Questions

How do my position controlled employee budgets compare with actual employee numbers?

Report Parameters

Before you run the report, you must specify values for the following parameters:

- Budget
- Budget Measurement Type
- Reporting Dates

Since this report covers current budgets only, you should enter the current date, or later, for the reporting end date.

Key Concepts

The following concepts enable you to accurately interpret the results of this report:

Budget Elements

When you set up a budget you can link it to an organization, job, position, and grade. This report calculates budget information at the organization level. The report counts all assignments for the organization regardless of their job, position, or grade. However, the report only includes budgets that have an organization set up against them.

For example, consider the following budgets for the Sales West organization:

- Sales West Grade 1 budget

  Budget Value = 10

- Sales West Grade 2 budget

  Budget Value = 15

The report ignores the grade element and displays the value for the organization Sales West as 25.

> **Note:** You should ensure that rollup budgets have not been set up, as the report includes them in the report and workbook totals. Using the above example again, if you had set up a rollup budget for Sales West, with a budget value of 25, combining the budget values for Grade 1 and 2, both the report and the workbook would calculate the budget value for Sales West as 50.

Budget Versions

When you run this report, you select a budget. If more than one version of the budget exists, the report only displays information for the version that is effective at today's date. Use the Employee Budget Status workbook if you want to select a specific version of a budget.

Budget Time Periods

This report enables you to investigate budgets within a specific time period. If you enter a time period, the report includes all the information for the calendar month at the start and end of the period. For example, if you enter 21-Jan-1998 to 21-Nov-1998, the report includes information from 01-Jan-1998 to 30-Nov-1998. Use the Employee Budget Status workbook if you want to view all the budget periods for a particular budget without entering a time period.

Headings and Calculations

The report uses the following calculations:

Budget Value

The report counts the budget value for each organization included in the budget. If an organization is used more than once within a budget, the report adds all the budget values together to produce a budget value.

Workforce variance

The report calculates workforce variance using budget measurement type you entered; and using the workforce figures for the last day of the time period you entered. The calculation is as follows:

Workforce Variance = Workforce Actual - Workforce Budgeted

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 1-44

Organization Budget (Non-Position) Status Report

This report investigates the performance of your best and worst organizations. It measures performance by the variance between the budgeted and actual number of employees in each organization. Top organizations are those with the largest variance. Bottom organizations are those with the least variance.

This report covers current non-position controlled budgets only.

To investigate the budgeted and actual workforce for all organizations included in the budget, run the related Employee Budget (Non Positional Control) Trend report.

If you run the Employee Budget (Non Positional Control) Trend report from the link in this report, it runs for the year commencing with the date you enter in the Reporting Date parameter in this report.

Business Questions

How do my workforce budgets compare with actual budgets?

Report Parameters

Before you run the report, you must specify values for the following parameters:

- Budget
- Display
- Reporting Date

Unlike the other Workforce Variance reports, when using the Organization Budget report, you do not enter the organization. Instead, the report displays the organizations used in the budget. You can select how many organizations you want to display, and whether to display the top and bottom organizations from the surplus or deficit list.

You can only select budgets that have a current version. The report also uses the version of the budget that most closely matches the reporting date.

Key Concepts

When considering performance, you can select to display the top organizations; these are the organizations with the greatest increase or least decrease in Workforce. Alternatively, you can select the bottom organizations; these are the organizations with the lowest increase or greatest decrease in Workforce. You can investigate up to 99 organizations in a section of your enterprise. This gives you the ability to consider the best 10 performers in a small section of your enterprise, or the worst 50 performers in a larger section of your enterprise.

Headings and Calculations

The report uses the following calculations:

Budget Value

The report counts the budget value for each organization included in the budget. If an organization is used more than once within a budget, the report adds all the budget values together to produce a budget value.

Workforce variance

The report calculates workforce variance using the budget measurement type of the budget version; and using the workforce figures for the reporting date. The calculation is as follows:

Workforce Variance = Workforce Actual - Workforce Budgeted

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 1-44

Organization Budget (Employee) Status Report

This report investigates the performance of your best and worst organizations. It measures performance by the variance between the budgeted and actual number of employees in each organization. Top organizations are those with the largest variance. Bottom organizations are those with the least variance.

This report covers current position controlled budgets only.

To investigate the budgeted and actual workforce for all organizations included in the budget, run the related Employee Budget Trend report.

If you run the Employee Budget Trend report from the link in this report, it runs for the year commencing with the date you enter in the Reporting Date parameter in this report.

Business Questions

How do my workforce budgets compare with actual budgets?

Report Parameters

Before you run the report, you must specify values for the following parameters:

- Budget

- Budget Measurement Type
- Display
- Reporting Date

Unlike the other Workforce Variance reports, when using the Organization Budget report, you do not enter the organization. Instead, the report displays the organizations used in the budget. You can select how many organizations you want to display, and whether to display the top and bottom organizations from the surplus or deficit list.

You can only select budgets that have a current version. The report also uses the version of the budget that most closely matches the reporting date.

Key Concepts

When considering performance, you can select to display the top organizations; these are the organizations with the greatest increase or least decrease in Workforce. Alternatively, you can select the bottom organizations; these are the organizations with the lowest increase or greatest decrease in Workforce. You can investigate up to 99 organizations in a section of your enterprise. This gives you the ability to consider the best 10 performers in a small section of your enterprise, or the worst 50 performers in a larger section of your enterprise.

Headings and Calculations

The report uses the following calculations:

Budget Value

The report counts the budget value for each organization included in the budget. If an organization is used more than once within a budget, the report adds all the budget values together to produce a budget value.

Workforce variance

The report calculates workforce variance using the budget measurement type you enter in the report parameters; and using the workforce figures for the reporting date. The calculation is as follows:

Workforce Variance = Workforce Actual - Workforce Budgeted

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 1-44

Headcount Budget Trend

This report shows changes in actual and budgeted employee headcount over time for the selected top line manager.

The report displays the total actual and budgeted headcount for all subordinates of the top line manager. The report excludes the top line manager from the total. The graph also displays the future dated data points to show the future dated headcount budget projections by period types selected in the parameter. Budget data is displayed for controlled budgets that are created for an organization.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

There are no calculations in this report.

Competencies, Qualifications and Development Intelligence

Key Concepts for Competencies, Qualifications, and Development Intelligence

Competencies, Qualifications and Development Intelligence enables you to investigate the competencies and proficiencies of employees and applicants.

The following concepts enable you to accurately interpret the results of the Competencies, Qualifications and Development intelligence reports:

Competencies and Proficiencies

Within Oracle HRMS, you define competencies and proficiencies against a person and job. If a person has multiple assignments for the same job, these reports only count the person once. This ensures that trends remain accurate.

In order to appear in the reports, people must work for the required job and grade for a competence on the report run date.

> **Note:** You must define competencies against jobs, and assign valid grades to jobs, or these reports will not be able to compare individual's proficiencies with their job competence requirements.

Competence Levels (Organization Hierarchy) Detail Analytics Workbook

The Competence Levels (Organization Hierarchy) Detail Analytics workbook displays the competence levels attained by individuals in the enterprise for a competence.

Business Questions

Which people are the most proficient and which people are the least proficient in a competence?

Parameters

Before running the worksheets you must enter a value for the following parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Person Assignment Type

Use the following parameters to further restrict the values in the workbook:

- Competence Name

  Or you can select a competence from the Competence page item in each worksheet.

Worksheets

This workbook has the following worksheets:

- By Person with Rank

- By Person

By Person with Rank Worksheet

The by Person with Rank worksheet lists each individual who have the selected competence, and shows you both the proficiency level they have achieved, and the proficiency level translated into a proficiency rank. You define proficiency levels against a competence for a job.

Proficiency ranks translate the proficiency levels into a more even spread of values. These values can provide a more consistent method for assessing proficiency ratings across competencies.

Headings and Calculations

The Person with Rank worksheet contains the following columns:

- **Person**

  The person's name.

- **Proficiency Level**

  Each person's proficiency level for the selected competence.

- **Proficiency Level Percent**

  Each person's percentage proficiency level for the selected competence.

- **Proficiency Level Rank**

  Each person's proficiency rank for the selected competence.

- **Proficiency Rank Percent**

  Each person's percentage proficiency rank for the selected competence.

By Person Worksheet

The by Person worksheet examines the people who hold the selected competence and their proficiency levels.

Headings and Calculations

This worksheet uses the following calculations:

- **Person**

  The person's name.

- **Proficiency Level**

  Each person's proficiency level for the selected competence.

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 1-56

Competence Match (Organization Hierarchy) Status Analytics Workbook

The Competence Match (Organization Hierarchy) Status Analytics workbook compares the competence requirements of a person's job with the person's competence proficiency levels.

This workbook helps you decide which applicants suit a vacancy, or which contingent worker suits an assignment. The workbook also highlights competence gaps in your enterprise, and so you can use it to gather training requirements.

Business Questions

How do the competencies of people in my enterprise match the competence requirements for jobs in my enterprise?

Parameters

Before running the worksheets you must enter a value for the following parameters:

- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Job
- Person Assignment Type

Worksheets

This workbook has the following worksheets:

- Compare to Minimum Proficiency
- Compare to Range
- By Organization and Location
- By Person
- By Person Graph

Compare to Minimum Proficiency Worksheet

The Compare to Minimum Proficiency worksheet compares people's proficiency levels with the minimum proficiency requirement for each competence relevant to their job. The worksheet displays how many people have the required competencies, and compares people's proficiency levels to the required minimum.

Headings and Calculations

The Compare to Minimum Proficiency worksheet contains the following columns:

- **Competence**

  The competencies you have defined for the job you selected in the Job parameter.

- **Min Required**

  The minimum level required for the competence.

- **Max Required**

  The maximum level required for the competence.

- **Without Competence**

  The number of people in the job who have no competence recorded.

- **Without Level**

  The number of people who have the competence, but no recorded level.

The worksheet has further columns that list the number of people whose ratings are above or below the minimum competence level required for the job.

The columns are as follows:

Column Name	Rating
<-3	More than three levels below the competence minimum level
-3	Three levels below the competence minimum level
-2	Two levels below the competence minimum level
-1	One level below the competence minimum level
Exact Match (Min Required)	Matches the competence minimum level
+1	One level above the competence minimum level
+2	Two levels above the competence minimum level
+3	Three levels above the competence minimum level
<+3	More than three levels above the competence minimum level

Compare to Range Worksheet

The Compare to Minimum Proficiency worksheet compares people’s proficiency levels to the required proficiency range for each competence relevant to their job. The worksheet displays how many people have the required competencies, and compares people’s proficiency levels to the required proficiency level range.

Headings and Calculations

The Compare to Range worksheet contains the following columns:

- **Competence**

  The competencies you have defined for the job you selected in the Job parameter.

- **Min Required**

  The minimum level required for the competence.
- **Max Required**

  The maximum level required for the competence.
- **Without Competence**

  The number of people in the job who have no competence recorded.
- **Without Level**

  The number of people who have the competence, but no recorded level.

The worksheet has further columns that list the number of people whose ratings are above or below the minimum competence level required for the job.

The columns are as follows:

Column Name	Rating
<-3	More than three levels below the competence minimum level
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-2	Two levels below the competence minimum level
-1	One level below the competence minimum level
Exact Match (Min Required)	Matches the competence minimum level
+1	One level above the competence minimum level
+2	Two levels above the competence minimum level
+3	Three levels above the competence minimum level
<+3	More than three levels above the competence minimum level

By Organization and Location Worksheet

The by Organization and Location worksheet enables you to see each person's level of proficiency for the competencies for their job.

Headings and Calculations

The by Organization and Location worksheet contains the following columns:

- **Location Name**
- **Organization**

The organizations within each location.

- **Competence**

  The competencies you have defined for the selected job, for each organization.

- **Person**

  The people in each organization who hold the selected job.

- **Required Proficiency Level**

  The minimum proficiency level required for the competence for the person's job.

- **Requirement Effective From**

  The date the proficiency level requirement began.

- **Requirement Essential**

  Whether the competence is essential for the job.

- **Attained Proficiency Level**

  The proficiency level attained by the person.

- **Date Attained**

  The date the person attained the proficiency level.

By Person Worksheet

The by Person worksheet enables you to see individuals' proficiency levels.

You select an individual from the Person page item in the worksheet.

Headings and Calculations

The worksheet contains the following columns:

- **Competence**

  The competencies you have defined for the selected job.

- **Requirement Effective From**

  The date the proficiency level requirement began.

- **Requirement Essential**

  Whether the competence is essential for the job.

- **Attained Proficiency Level**

  The proficiency level attained by the person.

- **Date Attained**

  The date the person attained the proficiency level.

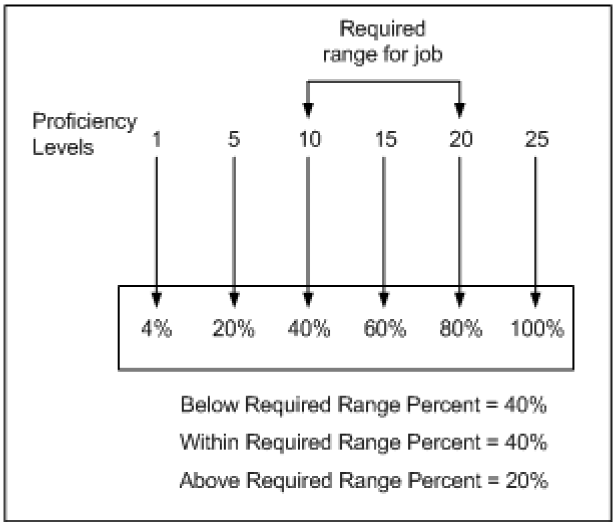
By Person Graph Worksheet

The by Person Graph worksheet breaks down each competence relevant to the selected job into percentages below, within, and above the required proficiency ranges for the job. It shows how an individual's competencies map to the requirement range.

You select an individual from the Person page item in the worksheet.

The workbook shows the percentage of the proficiency range that is below the minimum requirement, the percentage that is within the requirement range, and the percentage that is above the maximum requirement range. It reports the individual's proficiency in a competence as a percentage.

The diagram below shows you how proficiency levels for a competence translate into percentages.



Headings and Calculations

The worksheet contains the following columns:

- **Competence**

  The competencies you have defined for the selected job, for each selected organization.

- **Below Required Range Percent**

  The percentage of proficiency levels for the competence that are below the required minimum level for the job.

- **Within Required Range Percent**

  The percentage of proficiency levels for the competence that are within the required proficiency range for the job.

- **Above Required Range Percent**

  The percentage of proficiency levels for the competence that are above the required maximum level for the job.

- **Attained Level Percent**

  The percentage achievement level the selected person has attained for that competence.

Graph

A vertical bar chart enables you to see how an individual's proficiency level for a competence compares with the required proficiency standards. The chart displays two bars for each competence. The first bar represents the range of proficiency levels across a competence. The bar has three elements:

- The minimum achievable proficiency level to minimum required proficiency level.
- The minimum required proficiency level to maximum required proficiency level.
- The maximum required proficiency level to maximum achievable proficiency level.

The second bar displays the individual's attained proficiency level for the competence.

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 1-56

Competence Levels Report

This report displays the proficiency levels of employees or applicants for a competence.

If you want to find out which employees or applicants have the competence you require, run this report from the menu.

If you want to find out which employees or applicants have the competence you require for a particular job and grade, run this report from within the Group Competencies report by clicking on the competence name.

If you want to find out which employee or applicants have a competence at the proficiency level you require for a particular job and grade, run this report from within the Group Competencies report by clicking on the proficiency level number.

See: Group Competencies Report, page 1-63

Business Questions

How proficient are employees at a particular competency?

Parameters

Before you run the report you must specify values for the following parameters:

- Employee/Applicant
- Organization
- Rollup Organizations (Yes/No)
- Competence

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 1-56

Group Competencies Report

For each job and grade this report displays the proficiency levels for your employees or applicants in each required competence.

You can:

- View a list of all the people with a particular competence by selecting the competence you are interested in; this will run the Competence Levels report. For example, to list all the names and proficiency levels of people with communication skills, click on Communications in the table.
- View a list of all the people with a particular proficiency or proficiencies in a competence by selecting the number of people in that category; this will run the Competence Levels report. For example, you can list the names of the people with communications skills at a level below the required proficiency. You can then investigate how an individual's competencies match the job and grade requirements by clicking on the individual's name; this will run the Individual Competencies report.

See: Competence Levels Report, page 1-63

See: Individual Competencies Report, page 1-65

Important: In order to run the Group Competencies report successfully, you need to have valid mappings between jobs and grades.

Business Questions

How competent are my employees?

Parameters

Before you run the report you must specify values for the following parameters:

- Employee/Applicant
- Organization
- Rollup Organizations (Yes/No)
- Job
- Compare Against

Key Concepts

Using the Group Competencies report, you can investigate how many employees or applicants have a competence required for their job, and how far they are below or above the required competence proficiency level.

Reporting levels are:

- More than 3 proficiency levels below
- 3, 2, or 1 proficiency levels below
- Exact match for the proficiencies required
- 3, 2, or 1 proficiency levels above
- More than 3 proficiency levels above
- No matches

You can compare employees or applicants against either of the following:

- The lowest required proficiency level for each grade's competencies.
- The complete range of required proficiencies for each grade's competencies.

The report also makes the assumption that the proficiency scale defined for each competence is in ascending order, with low scores indicating low proficiency, and high scores indicating high proficiency.

Using the example of a senior manager, the lowest proficiency level required for the competence of team leading is 3. If all the counts are taken from the lowest proficiency level, employees with a proficiency level of 3 would be included in the exactly match band, employees with a proficiency level of 4 would be in the 3, 2, or 1 proficiency level above band, and so on.

If you choose to compare your employees or applicants against the complete range of proficiencies, then all counts are compared against the complete range of proficiencies. Using the senior manager example again, the range of proficiency levels is 3, 4, and 5. If an applicant or employee has a proficiency of 3, 4, or 5, they are counted as an exact match. If an applicant has a proficiency level of 6, they are counted as 1 proficiency level above and so on.

If applicants or employees do not have a grade recorded against their assignments, they are shown separately on the report.

If you do not use grades in your enterprise, the report only displays one bar chart instead of plotting a bar chart for each grade.

The report considers proficiencies and competencies for the job, on the day the report is run.

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 1-56

Individual Competencies Report

Run this report from the Group Competencies report.

This report compares an individual's competencies against the required competencies for the job and grade they hold.

If your employee does not have the proficiency level you require, a training course may exist to help. By clicking on a competence, you can run the Training Classes By Competence report to display courses that offer the selected competence.

> **Note:** You can only run this report from the Group Competencies report.

See: Group Competencies Report, page 1-63

See: Training Classes by Competence Report, page 1-206

Business Questions

How does an individual employee's actual competency compare with what is required?

Parameters

Before you run the report you must specify values for the following parameters:

- Job
- Grade
- Person

Key Concepts

Where the required competencies for a job and grade have different proficiency rating scales, the rating scales are combined so that the lowest proficiency levels are equal and then all subsequent levels will be equal.

For example, consider the following competencies and proficiency levels:

Competence = Team Leading, Proficiency Levels = 1, 2, 3, 4, 5, 6

Competence = Communication Proficiency Levels = 20, 30, 40, 50, 60

For the Individual Competencies report the proficiency levels would be mapped as follows:

1 = 20

2 = 30

3 = 40

4 = 50

5 = 60

6 does not have a matching communication proficiency level.

> **Note:** The chart excludes competencies held by the employee or applicant that are not required by the job or grade.

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 1-56

People Management Intelligence

Key Concepts for People Management Intelligence

The following concepts enable you to accurately interpret the results of the People Management intelligence reports:

- Workforce Count, page 1-67
- Workforce Gains and Losses, page 1-67
- Enterprise Selection, page 1-67
- Job Categories , page 1-69

Workforce Count

One of the most powerful features of the People Management reports is that you can define how workforce is counted.

Workforce does not necessarily have to be a count of the number of people in your enterprise; it can instead be a count of the assignments and any budget measurement type you have set up. For example, you can count workforce using the budget measurement types of FTE or Headcount.

Additionally, by writing your own formula, using Oracle FastFormula, or the provided formula, you can instruct the report to count workforce exactly how you want to.

See: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Workforce Gains and Losses

To enable you to investigate the workforce in your enterprise, the reports calculate gains and losses as follows:

- **Gains** are the total workforce that exists in the organization or organizations at the end of a time period, which did not exist at the beginning of the time period.
- **Losses** are the total workforce that exists in an organization or organizations at the beginning of a period, but no longer exists at the end of the period.
- **Total Workforce** is the workforce at the end of the time period.

Note: Workforce is counted using active and suspended assignments.

Enterprise Selection

You can decide which area of your enterprise to report on using the parameters of the reports. There are two different methods of enterprise selection:

- Rollup Organizations
- Rollup Each Organization

Note: Only the HTML Organization Workforce report uses the concept of Rollup Each Organization.

Rollup Organizations

Use the Organization or Top Organization and Hierarchy parameters, together with theOrganization Rollup parameter to report on one organization, an organization hierarchy, or a section of an organization hierarchy.

To report on a hierarchy, or a section of a hierarchy, enter the top organization or hierarchy you want to report on in the report parameters. You can then decide whether or not you want to rollup all the subordinate organizations in the hierarchy by entering either Yes or No in the Rollup Organizations parameter.

In some reports you can leave the Organization parameter blank to include all organizations in the hierarchy.

Rollup Each Organization

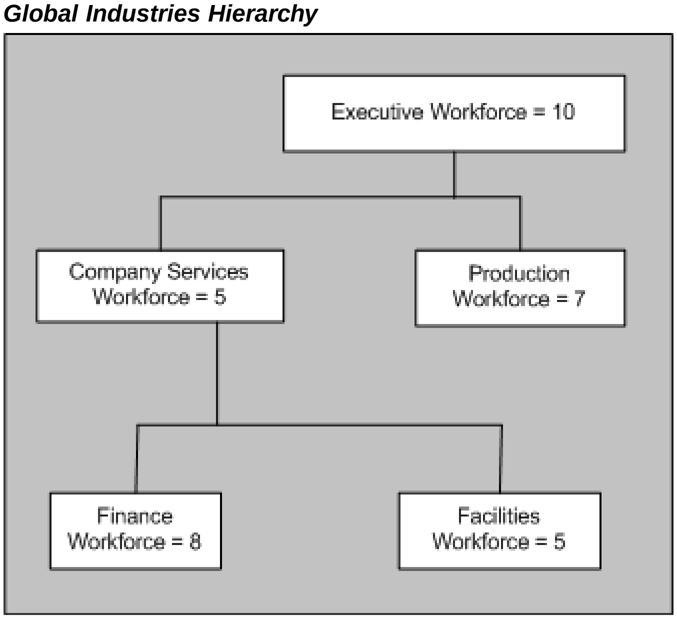
Select the area of your enterprise in the HTML reports by selecting a section of an organization hierarchy. For each report, you only need to enter one organization; all its subordinate organizations are included in the report.

You can then decide to either display information about each organization separately, or rollup information at each level of the hierarchy.

For example, consider the hierarchy for Global Industries shown in the diagram below. To select this section of the hierarchy, you enter Executive in the Organization parameter. The report automatically includes the Company Service, Production, Finance, and Facilities subsidiary organizations.

If you decide not to rollup the workforce count, the report displays each organization independently, and shows the workforce total for only that organization. The workforce total for each organization would be the same as shown in the diagram below. It shows the Executive Workforce of 10 at the top of the organization. Reporting to the Executive Workforce are the Production Workforce of 7, and the Company Services Workforce of 5. Reporting to the Company Services Workforce are the Financial Workforce of 8, and the Facilities Workforce of 5

Global Industries Hierarchy



If you decide to rollup each organization, the report will display information that is calculated for that organization and all the organizations below it in the hierarchy.

For Global Industries, the Workforce figures would be shown as in the following table:

Organization	Rolled Up Workforce
Executive (Top Organization)	35
Company Services	18
Finance	8
Facilities	5
Production	7

Job Categories

The Workforce Summary Analysis, Workforce Ratio, and Workforce Comparison HRMSi reports use job categories to investigate Workforce within your enterprise.

> **Note:** You can also analyze how successfully you are recruiting for each job category using the Recruiting and Hiring HRMSi reports.

Oracle HRMS enables you to set up job categories for the different jobs within your enterprise. You can set up categories to classify all your jobs. So you could, for example, set up the job categories of technical, managerial, administration, and so on.

Jobs within your enterprise can fall into more than one category, and HRMS enables you to enter as many categories as you need for a job.

Use the Workforce Ratio report to analyze the percentage of workforce your enterprise has in different job categories. Use the Workforce Comparison report to analyze the absolute levels of workforce.

Both the Workforce Ratio, and the Workforce Comparison reports use assignments to calculate the workforce for each job category. For an assignment to be included it must:

- Be active or suspended.
- Have the job and job category selected.
- Fit the selection criteria entered.

  For example: if you report on salaries by grade, the assignment must be for that grade.

If a job category does not have any workforce associated with it, the reports show it as a zero on the table, but do not display it in the bar chart.

Jobs may be assigned to more than one category. For example the job of Software Manager could have the job categories of technical and managerial. If you choose to report on both these categories, reports will display all assignments with the job of Software Manager in both the managerial and technical job categories.

For information on associating jobs with specific job categories, see Defining A Job, *Oracle HRMS Enterprise and Workforce Management Guide*

Workforce Count (Organization Hierarchy) Trend Analytics Workbook

The Workforce Count (Organization Hierarchy) Trend Analytics workbook calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range.

You can access this workbook from the Human Resources Intelligence – End User Self-Service menu.

Business Questions

How does the total number of employees in my enterprise change over time?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a time period, or a time period and another structure:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month
- By Year and Organization
- By Year and Geography

Most worksheets display one row for each time period. For example, the by Month worksheet displays one row for each month. However, the by Year and Organization worksheet displays one row for each year per organization, and similarly the by Year and Geography worksheet displays one row for each year per geographic area.

Workbook Headings and Calculations

The worksheets contain the following columns:

- **A time period column**

  The heading depends on the selected worksheet, for example, in the by Month worksheet, this column is named "Month".

- **Date**

  The start date of each time period.

- **Organization**

  Appears only in the by Year and Organization worksheet.

- **Area**

  Appears only in the by Year and Geography worksheet.

- **Workforce Measurement Value**

  The total Headcount or Full Time Equivalent (depending on your selection in the worksheet parameter) at the start of each time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Count Change (Organization Hierarchy) Status Analytics Workbook

The Workforce Count Change (Organization Hierarchy) Status Analytics workbook calculates the Workforce Measurement Value (Head Count or FTE) of your workforce and compares it across various groups such as organization, and geography.

You can access this workbook from the Human Resources Intelligence – End User Self-Service menu.

Business Questions

How does the change in the total number of employees in my enterprise compare across different organizations or geographical areas in my enterprise?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy

- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following optional parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a grouping within your organization:

- By Organization
- By Geography Area
- By Separation Category

The worksheets display one row for grouping. For example, the by Geography Area worksheet displays one row for each geographical area.

Workbook Headings and Calculations

The worksheets contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Job worksheet, this column is named "Job".

- **Start**

  The workforce total as at the start date entered in the worksheet parameters.

- **End**

  The workforce total as at the end date entered in the worksheet parameters.

- **Change**

  The numeric change in the workforce total over the selected time period.

- **Change Percent**

  The percentage change in the workforce total over the selected time period.

The numeric change in the workforce total is calculated as the difference between the Workforce Measurement Value on the Start Date and the Workforce Measurement Value on the End Date. The percentage change in the workforce total is calculated as the numeric change in the workforce total divided by the Workforce Measurement Value on the Start Date.

As an example, if the difference between the Workforce Measurement Value on the start date and end date is 10, and the start date workforce Measurement Value is 120, the percentage change in the workforce total is 120/10, making a percentage change of 12%.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Separation by Competence (Organization Hierarchy) Status Analytics Workbook

The Workforce Separation by Competence (Organization Hierarchy) Status Analytics workbook compares employee competencies to separations across organizations and geographical areas. It also enables you to view separations across different competence scales and ranks.

Business Questions

Does the level of employee competence bear any relation to separations from different organizations or geographical areas within my enterprise?

Is my enterprise losing people who have a particular competence at a specific level?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a grouping within your organization:

- By Organization
- By Geography Area
- By Scale Level
- By Rank Level

The by Organization worksheet displays one row for each organization. The by Geography Area worksheet displays one row for each geographical area. The by Scale Level and by Rank Level worksheets display one row for each competence.

By Organization Worksheet and by Geography Area Worksheet Headings and Calculations

The by Organization and by Geography Area worksheets each contain a matrix report with the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Organization worksheet, this column is named "Organization".

- **Competence columns** (one column per defined competence)

  The number of people in each group who have separated from the workforce during the selected time period, and hold the competence.

By Scale Level Worksheet Headings and Calculations

The by Scale Level worksheet enables you to see the number of people who have separated from the workforce who hold competencies at a specific scale level.

The matrix report contains the following columns:

- **Competence**

  The competencies associated with people who have separated from your workforce in the selected time period.

- **Min Required**

  The minimum proficiency level required for the competence.

- **Max Required**

  The maximum proficiency level required for the competence.

- **Scale level columns** (one column per defined scale level)

  The number of people who have separated from the workforce during the selected time period and have achieved the scale level for the competence.

- **Blank**

  The number of people who have separated from the workforce during the selected time period, with no associated scale level for the competence.

By Rank Level Worksheet Headings and Calculations

The by Rank Level worksheet enables you to see the number of people who have separated from the workforce who hold competencies at a specific rank level.

The matrix report contains the following columns:

- **Competence**

  The competencies associated with people who have separated from your workforce in the selected time period.

- **Min Required**

  The minimum proficiency level required for the competence.

- **Max Required**

  The maximum proficiency level required for the competence.

- **Rank level columns** (one column per defined rank level)

  The number of people who have separated from the workforce during the selected time period and have achieved the rank level for the competence.

- **Blank**

  The number of people who have separated from the workforce during the selected time period, with no associated rank level for the competence.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Separation by Competence (Organization Hierarchy) Trend Analytics Workbook

The Workforce Separation by Competence (Organization Hierarchy) Trend Analytics workbook compares employees' competencies, to the rate of separation over time.

Business Questions

Does the level of employee competencies bear any relation to the rate of separation from my enterprise?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following optional parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a time period, or a time period and another structure:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month

The worksheet matrix reports display one row for each time period. For example, the by Month worksheet displays one row for each month.

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

  The heading depends on the selected worksheet, for example, in the by Month worksheet, this column is named “Month”.

- **Start Date**

  The start date of each time period.

- **End Date**

  The end date of each time period.

- **Competence columns** (one column per defined competence)

  The number of people in each time period who have separated from the workforce and hold the competence.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Separation by Length of Work (Organization Hierarchy) Status Analytics Workbook

The Workforce Separation by Length of Work (Organization Hierarchy) Status Analytics workbook compares employees' length of service across various groups such as organization, geographical area and separation category.

Business Questions

To what extent does employee length of service vary across different groups in my enterprise?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a grouping within your organization:

- By Organization
- By Geography Area
- By Separation Category & Reason

The worksheets display one row for each group. For example, the by Organization worksheet displays one row for each organization. The by Separation Category & Reason worksheet displays one row for each Separation Reason within each Separation Category.

Headings and Calculations

The matrix reports contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Organization worksheet, this column is named "Organization".

  If you select the by Separation Category & Reason worksheet, two columns appear in the matrix – one for Separation Category and one for Separation Reason. Each row represents a Separation Reason within each Separation Category.

- **Length of work band columns** (one column per defined length of work band)

  The number of people who have separated from the workforce during the selected time period whose length of service matches the length of work band.

- **Total**

  The total number of separations during the selected time period for each group.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Separation by Length of Work (Organization Hierarchy) Trend Analytics Workbook

The Workforce Separation by Length of Work (Organization Hierarchy) Trend Analytics workbook compares the amount of time people have been with your enterprise, to the separation rate over time.

Business Questions

How long do employees tend to work for the enterprise? Does the length of service change over time?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following optional parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category

- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a time period, or a time period and another structure:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month

The worksheet matrix reports display one row for each time period. For example, the by Month worksheet displays one row for each month.

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

  The heading depends on the selected worksheet, for example, in the by Month worksheet, this column is named "Month".

- **Start Date**

  The start date of each time period.

- **End Date**

  The end date of each time period.

- **Length of work band columns** (one column per defined length of work band)

  The number of people who have separated from the workforce whose length of service matches the length of work band.

- **Total**

  The total number of separations for the time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Separation by Reason (Organization Hierarchy) Status Analytics Workbook

The Workforce Separation by Reason (Organization Hierarchy) Status Analytics workbook investigates the different reasons for separations within groups such as organization, geographical area, and separation category. You can determine if employees in different groups leave your enterprise for different reasons.

Business Questions

Why are employees leaving my enterprise? Do the leaving reasons vary between employee groups?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a grouping within your organization:

- By Organization
- By Geography Area
- By Separation Category

The worksheets display one row for each group. For example, the by Organization worksheet displays one row for each organization.

A Total row returns the total number of separations for each leaving reason.

Headings and Calculations

The matrix reports contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Organization worksheet, this column is named “Organization”.

- **Leaving reason columns** (one column per defined leaving reason)

  The number of people who have separated from the workforce for the leaving reason.

- **A blank column**

  The number of people who have separated from the workforce during the selected time period, with no associated leaving reason.

- **Total**

  The total number of separations during the selected time period for each worksheet grouping.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Separation by Reason (Organization Hierarchy) Trend Analytics Workbook

The Workforce Separation by Reason (Organization Hierarchy) Trend Analytics workbook enables you to investigate the different reasons why your enterprise is losing workforce over time.

Business Questions

Why are employees leaving my enterprise? Do the leaving reasons change over time?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following optional parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a time period, or a time period and another structure:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month

The worksheet matrix reports display one row for each time period. For example, the by Month worksheet displays one row for each month.

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

  The heading depends on the selected worksheet, for example, in the by Month worksheet, this column is named “Month”.
- **Start Date**

  The start date of each time period.
- **End Date**

  The end date of each time period.
- **Leaving reason columns** (one column per defined leaving reason, divided into voluntary and involuntary leaving reasons)

  The number of people who have separated from the workforce for the leaving reason for each time period.
- **Blank**

  The number of people who have separated from the workforce, with no associated leaving reason for each time period.
- **Total**

  The total number of separations for the time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Separation (Organization Hierarchy) Template Analytics Workbook

The Workforce Separation (Organization Hierarchy) Template Analytics workbook provides two worksheets looking at separations from your workforce over time, for different reasons, and across different organizations.

These worksheets help you to create reports to analyze the trend of separations from your workplace for different organizations and different separation reasons.

Workbook Parameters

The template includes the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

The template includes the following optional parameters:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This template workbook has the following worksheets:

- By Year, Organization and Separation Category
- Details

By Year, Organization and Separation Category Worksheet

The by Year, Organization and Separation Category worksheet investigates separations from the workforce for different organizations and different leaving reasons over yearly periods.

The worksheet displays one row for each year within the start and end dates you selected in the worksheet parameters.

Headings and Calculations

The worksheet contains the following columns:

- **Year**
- **Start Date**

  The start date of the year.

- **End Date**

  The end date of the year.

- **Separation Category columns**

  One set of columns for each separation category that you have defined. Each set includes a column for each relevant organization, as defined below.

- **Organization columns** (one column per organization that has had separations for the separation category)

  The number of people in the organization who have separated from the workforce within the specified separation category.

- **Total**

  The total number of separations within each year.

Details Worksheet

The Details worksheet tells you how separations from your workforce vary across different groups within your organization, such as organization, job, and location. For any date, you can see how many separations have occurred within each organization, location, job, grade, position, separation category, and separation reason.

A Total row displays the workforce separations for the period within the start and end dates selected in the parameters.

Headings and Calculations

The worksheet contains the following columns:

- **Event date**

  The date on which the separation occurred.

- **Workforce Separations**

  The number of separations for that date, for the same organization, location, job, grade, position, separation category, and separation reason.

- **Organization**

  The organization that had the separation.

- **Location**

  The location from which the separation took place.

- **Job**

  The job that had the separation.

- **Grade**

  The grade that had the separation.

- **Position**

  The position that had the separation.

- **Separation Category**

The separation category that had the separation, for example involuntary or voluntary.

- **Separation Reason**

  The reason for the separation.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics Workbook

This workbook calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each job category, and compares it across various groups such as organization, job, grade, and geography.

Business Questions

How does the total number of employees for different groupings in my organization, broken down, for example, by job category, change over time?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a grouping within your organization:

- By Organization
- By Geography Area
- By Job
- By Grade
- By Position

The worksheets display one row for each grouping. For example, the by Position worksheet displays one row for each position within each job category, and the Grade worksheet displays one row for each grade within each job category.

Headings and Calculations

The matrix reports contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Grade worksheet, this column is named "Grade".

- **Job Category**

  The job categories that exist for each worksheet grouping.

- **Start**

  The workforce total as at the start date entered in the worksheet parameters.

- **End**

  The workforce total as at the end date entered in the worksheet parameters.

- **Change**

  The numeric change in the workforce total over the selected time period.

- **Change Percent**

  The percentage change in the workforce total over the selected time period.

The numeric change in the workforce total is calculated as the difference between the Workforce Measurement Value on the Start Date and the Workforce Measurement Value on the End Date.

The percentage change in the workforce total is calculated as the numeric change in the workforce total divided by the Workforce Measurement Value on the Start Date.

As an example, if the difference between the Workforce Measurement Value on the start date and end date is 10, and the start date workforce Measurement Value is 120, the percentage change in the workforce total is 120/10, making a percentage change of 12%.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Count by Job Category (Organization Hierarchy) Trend Analytics Workbook

The Workforce Count by Job Category (Organization Hierarchy) Trend Analytics workbook calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each time period within the given date range.

Business Questions

How does the total number of employees, broken down by job category, change over time?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following optional parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a time period, or a time period and another structure:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month

The worksheets display one row for each time period for each job category. For example, the by Month worksheet displays one row for each month for each job category.

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

  The heading depends on the selected worksheet, for example, in the by Month worksheet, this column is named “Month”.

- **Date**

  The start date of each time period.

- **Job Category**

  Lists the job categories that exist within each time period.

- **Workforce Measurement Value**

  The total Headcount or Full Time Equivalent (depending on your selection in the worksheet parameter) for each job category at the start of each time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Count (Organization Hierarchy) Template Analytics Workbook

The Workforce Count (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating workforce losses that occur within yearly periods, the other providing a detailed analysis of the losses within yearly periods.

These worksheets help you to create reports to analyze how your workforce is changing. For an explanation of how workforce count is calculated, see: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Workbook Parameters

The template includes the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

The template includes the following optional parameters:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category

- Job
- Grade
- Position

Worksheets

This template workbook has the following worksheets:

- By Year
- Details

By Year Worksheet

The by Year worksheet analyses how your workforce fluctuates over time.

It displays one row for each year within the start and end dates you selected in the worksheet parameters.

Headings and Calculations

The worksheet contains the following columns:

- **Year**
- **Date**

  The start date of the year.
- **Workforce Measurement Value**

  The total workforce count for each year (the returned value depends on the workforce measurement value you selected in the worksheet parameters).

Details Worksheet

The Detail worksheet tells you how your workforce fluctuates across different groups within your organization, such as organization, job, and location. You view the detail for one year at a time.

Use the Year page item in the worksheet to select the year you are interested in.

The worksheet displays one row for each organization, location, job, grade, and position.

Headings and Calculations

The worksheet contains the following columns:

- **Organization**

  The organization that had the gain.
- **Location**

  The location where the gain took place.
- **Job**

  The job of the gain.
- **Grade**

The grade of the gain.

- **Position**

  The position of the gain.

- **Workforce Measurement Value**

  The total workforce count for each of the above groups (the returned value depends on the workforce measurement value you selected in the worksheet parameters).

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Gain (Organization Hierarchy) Status Analytics Workbook

The Workforce Gain (Organization Hierarchy) Status Analytics workbook lists the total gains that occurred within a given time period for various groups such as organization, location, gender, and ethnic origin. Each worksheet represents the total gains for one specific grouping. You can also select which area of your enterprise you want to investigate.

The workbook identifies a gain when an employee is active one day and inactive the next. It attributes the gain to the first date on which the employee is not active.

The report shows gains caused by transfers in depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of gains to my workforce, broken down into separations, long-term absence ends, transfers and secondary assignment starts, compare for different groupings in my organization?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category

- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a grouping within your organization:

- By Organization
- By Geography Area
- Job
- Grade
- Position

The worksheets display one row for each grouping. For example, the by Position worksheet displays one row per position.

Headings and Calculations

The worksheets contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Job worksheet, this column is named “Job”.

- **New Starts**

  The total number of new starts for each grouping.

- **Transfers**

  The total number of transfers in for each grouping.

- **Secondary Assignment Starts**

  The total number of secondary assignment starts for each grouping.

- **Long Term Absence Returns**

  The total number of returns from long term absences for each grouping.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Gain (Organization Hierarchy) Trend Analytics Workbook

The Workforce Gain (Organization Hierarchy) Trend Analytics workbook lists the total gains that occurred within a given date range for time periods such as year, semi-year, month, bi-month, and quarter. Each worksheet represents the total gains for one specific time period. You can also select which area of your enterprise you want to investigate.

The workbook identifies a gain when an employee is inactive one day and active the next. It attributes the gain to the first date on which the employee is active.

The workbook shows gains caused by transfers in depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of gains to my workforce, broken down into new starts, long-term absence ends, transfers in and secondary assignment starts, change over time?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following optional parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a time period, or a time period and another structure:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month

The worksheets display one row for each time period. For example, the by Year worksheet displays one row per year.

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

  The heading depends on the selected worksheet, for example, in the by Year worksheet, this column is named "Year".

- **Start Date**

  The start date of each time period.

- **End Date**

  The end date of each time period.

- **Total Gains**

  The total of all workforce gains due to new starts, transfers in, secondary assignment starts, and long term absence returns.

- **New Starts**

  The total workforce gains attributable to new starters with the organization.

- **Transfers**

  The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

  The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

  The total workforce gains attributable to returns from long term absences.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Gain (Organization Hierarchy) Template Analytics Workbook

The Workforce Gain (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating workforce gains that occur within yearly periods and within different organizations, the other providing a detailed analysis of gains in the workforce.

These worksheets help you to create reports to analyze how your workforce is growing. The workbook identifies a gain when an employee is inactive one day and active the next. It attributes the gain to the first date on which the employee is active.

The workbook shows gains caused by transfers in depending on the portion of the organization hierarchy you are viewing.

Workbook Parameters

The template includes the following mandatory parameters:

- Start Date
- End Date

- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

The template includes the following optional parameters:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This template workbook has the following worksheets:

- By Year and Organization
- Detail

By Year and Organization Worksheet

The by Year and Organization worksheet analyses how workforce gains have occurred, and compares the gains over time and across organizations.

It displays one row for each organization within each year.

Headings and Calculations

The worksheet contains the following columns:

- **Year**
- **Year Start Date**
- **Year End Date**
- **Organization**

  The name of each organization in which gains have occurred within each year.
- **Total Gains**

  The total of all workforce gains due to new starts, transfers in, secondary assignment starts, and long term absence returns.
- **New Starts**

  The total workforce gains attributable to new starters with the organization.
- **Transfers**

The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

  The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

  The total workforce gains attributable to returns from long term absences.

Detail Worksheet

The Detail worksheet tells you how the gains occurred and how the gains have been deployed within the workforce.

The worksheet displays one row for all gain events occurring on a specific date within the worksheet parameter start and end dates, within each organization, location, job, grade, and position.

Headings and Calculations

The worksheet contains the following columns:

- **Event Date**

  The date the gain took place.

- **Total Gains**

  The total of all workforce gains occurring on the event date within the same organization, location, job, grade and position.

- **New Starts**

  The total workforce gains attributable to new starters with the organization.

- **Transfers**

  The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

  The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

  The total workforce gains attributable to returns from long term absences.

- **Organization**

  The organization that had the gain.

- **Location**

  The location where the gain took place.

- **Job**

  The job of the gain.

- **Grade**

  The grade of the gain.

- **Position**

  The position of the gain.

- **Workforce Measurement Value**

  The total workforce count for each of the above groups (the returned value depends on the workforce measurement value you selected in the worksheet parameters).

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Loss (Organization Hierarchy) Status Analytics Workbook

The Workforce Loss (Organization Hierarchy) Status Analytics workbook lists the total losses that occurred within a given time period for various groups such as organization, location, gender, and ethnic origin. Each worksheet represents the total losses for one specific grouping. You can also select which area of your enterprise you want to investigate.

The workbook identifies a loss when an employee is active one day and inactive the next. It attributes the loss to the first date on which the employee is not active.

For terminations, the loss occurs one day after the termination separation date (as the termination date coincides with the employees' last day at work).

The workbook includes long-term absences or suspensions only once. If you permanently terminate or transfer an employee who is on long-term absence or suspension, the report does not count the termination or transfer because the employee wasn't active when terminated or transferred.

The report shows losses caused by transfers out depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of losses from my enterprise, broken down into separations, long term absences, transfers and secondary assignment ends, compare for different groupings in my organization?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region

- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a grouping within your organization:

- By Organization
- By Geography Area
- Job
- Grade
- Position

The worksheets display one row for each grouping. For example, the by Position worksheet displays one row per position.

Headings and Calculations

The worksheets contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Job worksheet, this column is named "Job".

- **Separations**

  The total number of separations from your organization for each grouping.

- **Transfers**

  The total number of transfers out of your organization for each grouping.

- **Secondary Assignment Ends**

  The total number of secondary assignment ends for each grouping.

- **Long Term Absences**

  The total number of long term absences for each grouping.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Loss (Organization Hierarchy) Trend Analytics Workbook

The Workforce Loss (Organization Hierarchy) Trend Analytics workbook lists the total losses that occurred within a given date range for time periods such as year, semi-year, month, bi-month, and quarter. Each worksheet represents the total losses for one specific time period. You can also select which area of your enterprise you want to investigate.

The workbook identifies a loss when an employee is active one day and inactive the next. It attributes the loss to the first date on which the employee is not active.

For terminations, the loss occurs one day after the termination separation date (as the termination date coincides with the employees' last day at work).

The workbook includes long-term absences or suspensions only once. If you permanently terminate or transfer an employee who is on long-term absence or suspension, the report does not count the termination or transfer because the employee wasn't active when terminated or transferred.

The workbook shows losses caused by transfers out depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of losses from my enterprise, broken down into separations, long term absences, transfers and secondary assignment ends, change over time?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following optional parameters to further restrict the values in the workbook:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This workbook has the following worksheets, each representing a time period, or a time period and another structure:

- By Year
- By Semi Year

- By Quarter
- By Bi Month
- By Month
- By Position

The worksheets display one row for each time period. For example, the by Year worksheet displays one row per year.

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

  The heading depends on the selected worksheet, for example, in the by Year worksheet, this column is named "Year".

- **Start Date**

  The start date of each time period.

- **End Date**

  The end date of each time period.

- **Total Losses**

  The total workforce losses for the period.

- **Separations**

  The total workforce losses attributable to separations from your organization.

- **Transfers**

  The total workforce losses attributable to transfers out of the organization for time period.

- **Secondary Assignment Ends**

  The total workforce losses attributable to the ending of secondary assignments within the organization for time period.

- **Long Term Absences**

  The total workforce losses attributable to long term absences from the organization for time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Loss (Organization Hierarchy) Template Analytics Workbook

The Workforce Loss (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating workforce losses that occurred within yearly periods and within different organizations, the other providing a detailed analysis of losses in the workforce.

These worksheets help you to create reports to analyze how your workforce is decreasing. The workbook identifies a loss when an employee is active one day and inactive the next. It attributes the loss to the first date on which the employee is inactive.

The workbook shows losses caused by transfers out depending on the portion of the organization hierarchy you are viewing.

Workbook Parameters

The template includes the following mandatory parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

The template includes the following optional parameters:

- Geography Area
- Geography Country
- Geography Region
- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

This template workbook has the following worksheets:

- By Year and Organization
- Detail

By Year and Organization Worksheet

The by Year and Organization worksheet analyses when and where workforce gains occur. It compares workforce gains over time and across organizations.

It displays one row for each organization within each year.

Headings and Calculations

The worksheet contains the following columns:

- **Year**
- **Year Start Date**

- **Year End Date**
- **Organization**

  The name of each organization in which losses have occurred within each year.
- **Total Losses**

  The total of all workforce losses due to separations, transfers out, secondary assignment ends, and long term absences.
- **Separations**

  The total workforce losses attributable to separations from the organization.
- **Transfers**

  The total workforce losses attributable to transfers out of the organization.
- **Secondary Assignment Ends**

  The total workforce losses attributable to the ending of secondary assignments.
- **Long Term Absences**

  The total workforce losses attributable to long term absences from the organization.

Detail Worksheet

The Detail worksheet tells you how losses occurred and where losses occurred within the workforce.

The worksheet displays one row for all loss events occurring on a specific date within the worksheet parameter start and end dates, within each organization, location, job, grade, and position.

Headings and Calculations

The worksheet contains the following columns:

- **Event Date**

  The date the loss took place.
- **Organization**

  The organization that had the loss.
- **Location**

  The location where the loss took place.
- **Job**

  The job of the loss.
- **Grade**

  The grade of the loss.
- **Position**

  The position of the loss.
- **Total Losses**

The total of all workforce losses occurring on the event date within the same organization, location, job, grade and position.

- **Separations**

  The total workforce losses attributable to separations from the organization.

- **Transfers**

  The total workforce losses attributable to transfers out of the organization.

- **Secondary Assignment Ends**

  The total workforce losses attributable to the ending of secondary assignments.

- **Long Term Absences**

  The total workforce losses attributable to long term absences from the organization.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Employee Movement by Organization Analysis Workbook

This workbook investigates changes in organization employees over specified periods of time. Changes are measured using budget measurement type as a parameter, and retrieving the relevant assignment budget value.

The resulting information enables you to:

- Analyze employee turnover across organizations by quarter
- View hire information across organizations
- Analyze terminations across organizations
- View employee transfer information across organizations

Worksheets

This workbook has the following worksheets:

- Hires, Terminations and Transfers
- Hires
- Terminations
- Transfers In
- Transfers Out

Hires, Terminations and Transfers Worksheet

This worksheet enables you to view high-level information about the value of hires, terminations, and transfers in all organizations within your Business Group, by year quarter. The resulting information enables you to:

- Analyze employee changes by quarter.
- Compare employee change across all organizations within a Business Group.

Business Questions

What are the workforce movements within my organization?

Parameters

You must specify values for the following parameters:

- Summary Budget Measurement Type
- Summary Year
- Summary Quarter

Hires Worksheet

This worksheet displays hire information in detail. The worksheet enables you to analyze hire information by job, position, assignment, or location. It enables you to:

- Analyze hire trends within an organization.
- Analyze skills required within an organization.

Business Questions

Who has been hired into my organization?

Parameters

You must specify values for the following parameters:

- Hires Budget Measurement Type
- Hires Year
- Hires Quarter

Terminations Worksheet

This worksheet enables you to analyze terminations within your organizations in detail. For each termination you can analyze employee terminations across all organizations within a Business Group.

Business Questions

Who has left my organization?

Parameters

You must specify values for the following parameters:

- Termination Budget Measurement Type
- Termination Year
- Termination Quarter

Transfers In Worksheet

This worksheet enables you to investigate the total budget value of employees transferring into different organizations in your Business Group. For each transfer you can analyze the:

- Organization transferred from.
- Location transferred from.
- Position or job transferred from.

Business Questions

Who has transferred into my organization?

Parameters

You must specify values for the following parameters:

- Transfers In Budget Measurement Type
- Transfers In Year
- Transfers In Quarter

Transfers Out Worksheet

This worksheet enables you to investigate the total budget value of employees transferring out of different organizations in your Business Group. For each transfer you can analyze the:

- Organization transferred to.
- Location transferred to.
- Position or job transferred to.

Business Questions

Who has transferred out of my organization?

Parameters

You must specify values for the following parameters:

- Transfers Out Budget Measurement Type
- Transfers Out Year
- Transfers Out Quarter

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Employee Primary Assignment Count (by Location and Employment Category) Comparison Workbook

This workbook enables you to report on employee primary assignment numbers by location, for organization and supervisor hierarchies.

The workbook groups employee primary assignments by employment category (for example, Fulltime – Regular, Fulltime – Temporary). Employee assignments that are not assigned an employment category display in a blank worksheet column.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Without Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given organization hierarchy.

You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Business Questions

How many employees for a given organization work in each location?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date
- Assignment Statuses To Include
- Locations to Include

The worksheet includes employees who have an assignment on the effective date, at a selected location, within the selected organization hierarchy.

You can further restrict the report by using the following parameter:

- Person Types to Exclude

Without Organization Hierarchy Worksheet

The Without Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location without using organization or supervisor hierarchies.

You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Business Questions

How many employees work in each location?

Parameters

You must specify values for the following parameters:

- Effective Date
- Assignment Statuses To Include

- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes the selected people types who have an assignment on the effective date that matches a selected assignment status, and is at a selected location.

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given supervisor.

You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Business Questions

How many employees reporting to a specific supervisor work in each location?

Parameters

You must specify values for the following parameters:

- Supervisor Name
- Effective Date
- Assignment Statuses To Include
- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes employees who have an assignment on the effective date with a selected assignment status, at a selected location, and within the selected supervisor hierarchy.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Employee Primary Assignment Count (by Organization and Employment Category) Comparison Workbook

This workbook enables you to report on employee primary assignment numbers by organization, for organization and supervisor hierarchies.

The workbook shows employee primary assignment count for each employment category (for example, Full time – Regular, or Full time – Temporary). Employee assignments that do not have an employment category display in a column with a blank title in each worksheet.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Organization Hierarchy Rollup
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on employee primary assignment numbers by location for a given organization hierarchy.

You can use the worksheet parameters to customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

Business Questions

How many employees work in each organization in my hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date
- Assignment Statuses To Include
- Locations to Include

The worksheet includes employees who have an assignment on the effective date, at a selected location, within the selected organization hierarchy.

You can further restrict the report by using the following parameter:

- Person Types to Exclude

Organization Hierarchy Rollup Worksheet

The Organization Hierarchy Rollup worksheet allows you to report on employee primary assignment numbers by Organization Rollup for a given organization.

The worksheet parameters enable you customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

Business Questions

How many employees work in each organization in my hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

- Assignment Statuses To Include
- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes the selected people types who have an assignment on the effective date that matches a selected assignment status, and is at a selected location, and within the selected hierarchy.

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on employee primary assignment numbers by organization for a given supervisor.

Use the worksheet parameters to configure the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

Business Questions

How many employees reporting, directly or indirectly to a specific supervisor, work in each organization in my hierarchy?

Parameters

You must specify values for the following parameters:

- Supervisor Name
- Effective Date
- Assignment Statuses To Include
- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes employees who have an assignment on the effective date with a selected assignment status, at a selected location, and within the selected supervisor hierarchy.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Assignment Activity Analysis Workbook (EDW)

The Workforce Assignment Activity Analysis workbook gives you a view of the changes in workforce assignments within your enterprise; for example, the number of grade and location changes within a particular organization.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Organization Changes
- Location Changes
- Grade Changes

Organization Changes Worksheet

The Organization Changes worksheet provides a summary of the headcount or full-time equivalent for employees changing organizations within a specified calendar year. Initially the worksheet only displays the top-level employing organizations; you need to drill down to see transfers between organizations further down the organizational hierarchy.

The worksheet excludes new hires to your enterprise, since new hires have not changed organization.

Business Questions

How many transfers have occurred over the past 12 months?

Parameters

This worksheet has no parameters.

Location Changes Worksheet

The Location Changes Worksheet provides a summary of the head count or full time equivalent for people changing locations for a specified top-level employing organization within a specified calendar year.

The worksheet uses a grid to represent the location changes for an employee; the location the employee moved from appears on the left, and the location the employee moved to appears across the top.

The worksheet excludes new hires to your enterprise, since new hires have not changed location.

Business Questions

How many people have changed location or have been re-deployed to a specific location over the last year?

Parameters

This worksheet has no parameters.

Grade Changes Worksheet

The Grade Changes worksheet provides a summary of the head count or full time equivalent, or the average number of months between grade changes, for a specified top-level employing organization within a particular calendar year, for employees changing grade.

The worksheet uses a grid to represent the grade changes for an employee; the grade the employee changed from appears on the left, and the grade the employee changed to appears across the top.

The worksheet excludes new hires to your enterprise, since new hires have not changed grade.

Business Questions

How many grade changes have occurred in the enterprise this year?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Composition Analysis Workbook (EDW)

The Workforce Composition Analysis workbook is designed to give you detailed analysis of the makeup of the workforce, including items such as headcount or full-time equivalent, period of work, location of workforce, and sensitive employment data. This data is then displayed by organization.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

Composition Summary Worksheet

The Composition Summary worksheet provides a summary of person head count or full-time equivalent for top-level employing organizations for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

Show me my workforce full-time equivalent broken down for each organization in a Business Group.

What is the workforce headcount for a specific organization and its subordinates, for a specific organization hierarchy version?

Show me the total workforce full-time equivalents in my Business Group.

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Period of Service Worksheet

The Composition by Period of Service worksheet provides a summary of person head count or full-time equivalent by period of service for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

Show me my workforce by length of service band.

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Age Band Worksheet

The Composition by Age Band worksheet provides a summary of person head count or full-time equivalent by employee age band for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

Show me my workforce broken by age band.

What are the current ages of my workforce in age bands?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Disability Status Worksheet

The Composition by Disability Status worksheet provides a summary of person head count or full-time equivalent by disability status (disabled, not disabled, or undefined) for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

What is my workforce composition over time?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Gender Worksheet

The Composition by Gender worksheet provides a summary of person head count or full-time equivalent by gender for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

What is my workforce full-time equivalent by gender over time?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Location Worksheet

The Composition by Location worksheet provides a summary of person head count or full-time equivalent, by location, for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

What is the composition of my workforce at each location of my enterprise, over time?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Planning Summary Analysis Workbook (EDW)

The Workforce Planning workbook is designed to give an executive overview of workforce changes within an enterprise. This workbook is intended for Human Resources staff at the Director level or above.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Recruitment by Organization, page 1-113
- Recruitment Efficiency (Average Days), page 1-113
- Composition Summary, page 1-114
- Composition by Location, page 1-114
- Organization Changes, page 1-115
- Separation by Organization, page 1-115
- Voluntary/Involuntary Separation, page 1-115

Recruitment by Organization Worksheet

The Recruitment by Organization worksheet gives you a recruitment summary by top-level employing organization. You can report on the following measures:

- Head count
- Full-time equivalent
- Average number of days between application and hire
- Average number of days

Business Questions

Show me my total gains for all the organizations in the primary hierarchy of a Business Group.

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Recruitment Efficiency (Average Days) Worksheet

The Recruitment Efficiency (Average Days) worksheet provides information concerning efficiency of recruitment for a specified calendar year (based on the date employment started) for each top-level employing organization.

You can report on the average number of days from application to termination (the date the application was ended by the employer or the applicant), first interview, second interview, offer, acceptance, and hire.

Business Questions

Show me the average time to hire/offer/first interview by job, location, etc.

What is the average time to offer/rejection by job, location, etc?

From which locations/jobs do we have the greatest difficulty (based on average time to hire) or the greatest cost in hiring?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Composition Summary Worksheet

The Composition Summary worksheet provides a summary of workforce composition for a top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

Show me my workforce full-time equivalents for each organization in a Business Group.

What is the workforce headcount for a specific organization and its subordinates, for a specific organization hierarchy version?

Show me the total workforce full-time equivalents in my Business Group.

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Location Worksheet

The Composition by Location worksheet provides a summary of person head count or full-time equivalent, by location, for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

What is the composition of my workforce at each location of my enterprise, over time?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Organization Changes Worksheet

The Organization Changes worksheet provides a summary of the headcount or full time equivalent for employees changing organizations within a specified calendar year. Initially only the top-level employing organizations are displayed; you need to drill down to see transfers between organizations further down the organizational hierarchy.

The worksheet uses a grid to represent organization changes for an employee; organization transferred from appears on the left, and organization transferred to appears across the top.

The worksheet excludes new hires to your enterprise, since new hires have not changed organization.

Business Questions

How many transfers have occurred over the past 12 months?

Parameters

This worksheet uses no parameters.

Separation by Organization Worksheet

The Separation by Organization worksheet provides a summary of person head count or full-time equivalent by top-level employing organization.

Business Questions

How many separations (headcount or full-time equivalent) have occurred in each of my organizations over the past 12 months, by month?

Show me my total losses for this year, for each organization in a particular hierarchy.

Parameters

This worksheet uses no parameters.

Voluntary/Involuntary Separation Worksheet

The Voluntary/Involuntary Separation worksheet provides a summary of person head count or full-time equivalent for a selected top-level employing organization by loss type (voluntary or involuntary) for the last 3 years and the current year.

Business Questions

What is the ratio of voluntary to involuntary terminations month-by-month and year-by-year?

Parameters

This worksheet uses no parameters.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Separation Analysis Workbook (EDW)

The Workforce Separation workbook is designed to give you detailed analysis of the employees leaving your workforce.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Separation by Organization, page 1-116
- Separation Reasons by Organization, page 1-116
- Separation by Period of Service, page 1-117
- Separation by Period of Service and Reason, page 1-117
- Voluntary/Involuntary Separation, page 1-118
- Separation by Age Band, page 1-118
- Separation by Disabled Status, page 1-119
- Separation by Gender, page 1-119
- Separation Reasons by Age Band, Disability Status, and Gender, page 1-119

Separation by Organization Worksheet

The Separation by Organization worksheet provides a summary of person head count or full-time equivalent by top-level employing organization.

Business Questions

How many separations (headcount or full-time equivalent) have occurred in each of my organizations over the past 12 months, by month?

Show me my total losses for this year, for each organization in a particular hierarchy.

Parameters

This worksheet uses no parameters.

Separation Reasons by Organization Worksheet

The Separation Reasons by Organization worksheet provides a summary of person head count or full-time equivalent for a selected top-level employing organization, by separation type (voluntary or involuntary) and separation reason (for example, by disability, poor performance, or end of contract).

Business Questions

What is the breakdown of the separations (headcount or full-time equivalent) by reason?

What are the main reasons given by people for separating, and how do the reasons compare to last year?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Period of Service Worksheet

The Separation by Period of Service worksheet provides a summary of person head count or full-time equivalent by period of service for a selected top-level employing organization.

Business Questions

What are the separations by period of service band?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Period of Service and Reason Worksheet

The Separation by Period of Service and Reason worksheet provides a summary of person head count or full-time equivalent by period of service and separation reason for a selected top-level employing organization and calendar year (based on the year separation occurred).

Business Questions

What are the separations by period of service band?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Voluntary/Involuntary Separation Worksheet

The Voluntary/Involuntary Separation worksheet provides a summary of person head count or full-time equivalent for a specified top-level employing organization by voluntary or involuntary separation type.

Business Questions

What is the ratio of voluntary to involuntary terminations, month-by-month and year-by-year?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Age Band Worksheet

The Separation by Age band worksheet provides a summary of person head count or full-time equivalent by employee age band for a selected top-level employing organization.

Business Questions

How do the number of separations compare across age groups?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Disabled Status Worksheet

The Separation by Disabled Status worksheet provides a summary of person head count or full-time equivalent by disability status (disabled, not disabled, or undefined) for a selected top-level employing organization.

Business Questions

How many separations are in a known minority group (disability status)?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Gender Worksheet

The Separation by Gender worksheet provides a summary of person head count or full-time equivalent by gender for a selected top-level employing organization.

Business Questions

How many separations are in a known minority group (gender)?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation Reasons by Age Band, Disability Status, and Gender Worksheet

The Separation Reasons by Age Band, Disability Status, and Gender worksheet provides a summary of person head count or full-time equivalent by separation reason for a selected top-level employing organization, by age band, disability status, or gender.

Business Questions

How many separations are in known minority groups (age, gender, disability status)?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Employee Count KPI Status PMV Report

The Employee Count KPI Status PMV report provides a view of the HRI Employee Count Status KPI data.

See: HRI Employee Count Status KPI, page 1-120

Report Parameters

You must specify values for the following parameters:

- Organization
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Job
- Grade
- Position

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

HRI Employee Count Status KPI

Use the HRI Employee Count Status KPI to notify a particular responsibility when employee levels are below or above your budgeted level.

For example, you can set up the target Employee Count of 50 Full–time Equivalent (FTE), and the below target of 10% and above target of 20% in the notification range. The application notifies the selected responsibility when the FTE falls below 45 or rises above 60, using the Employee Count KPI Status PMV report .

Business Questions

Tell me when the number of my employees rises or falls outside of my budget level.

KPI Parameters

The HRI Employee Count Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Workforce Measurement Type

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the budget measurement value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and Full-Time Equivalent (FTE).

For more information, see Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments that are:

- Active on the KPI execution date.
- For the organization defined by the HR Organization parameter.

Related Topics

Employee Count KPI Status PMV Report, page 1-120

Employee Count with Job Category KPI Status PMV Report

The Employee Count with Job Category KPI Status PMV report provides a view of the HRI Employee Count with Job Category Status KPI data.

See: HRI Employee Count with Job Category Status KPI, page 1-122

Report Parameters

You must specify values for the following parameters:

- Organization
- Job Category
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Grade
- Position

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

HRI Employee Count with Job Category Status KPI

Use the HRI Employee Count with Job Category Status KPI to notify a particular responsibility when employee levels in a job category are below or above your budgeted level.

For example, you can set up the target employee count in a job category of 50 Full–time Equivalent (FTE), and the below target of 10% and above target of 20% in the notification range. The application notifies the selected responsibility when the FTE in a job category falls below 45 or rises above 60.

Business Questions

Tell me when the number of my employees for a specific job category rises or falls outside of my budget level.

KPI Parameters

The HRI Employee Count with Job Category Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category
- Workforce Measurement Type

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the budget measurement value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and Full-Time Equivalent (FTE).

For more information, see Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments that are:

- Active on the KPI execution date.
- For the organization defined by the HR Organization parameter.
- For the job category specified by the Job Category parameter.

Related Topics

Employee Count with Job Category KPI Status PMV Report, page 1-121

Employee Separation KPI Status PMV Report

The Employee Separation Status KPI PMV report provides a view of the HRI Employee Separation Status KPI data.

See: HRI Employee Separation Status KPI, page 1-123

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Job
- Grade
- Position
- Separation Category
- Separation Reason

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

HRI Employee Separation Status KPI

Use the HRI Employee Separation Status KPI to notify a particular responsibility when the number of employees leaving your organization exceeds the predefined target levels.

For example, you can notify all users with a management responsibility when employee separation rises above 75%.

Business Questions

Tell me when the number of employees leaving my organization rises above my target level.

KPI Parameters

The HRI Employee Count Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Workforce Measurement Type
- From Date

- To Date

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the budget measurement value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and Full–time Equivalent (FTE).

For more information, see Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments as separated that are:

- Linked to an employee who has left your enterprise.
- Not transferred to a different organization, suspended, or ended.
- Active at the beginning of the time period defined by the time dimension, but not active at the end of the time period.
- For the organization defined by the HR Organization parameter.

Related Topics

Employee Separation KPI Status PMV Report, page 1-123

Workforce Separation by Rolling Month – Status KPI PMV Report

The Workforce Separation by Rolling Month – Status KPI PMV report provides a view of the HRI Workforce Separation Full Time Equivalent by Rolling Month KPI, and the HRI Workforce Separation Headcount by Rolling Month KPI data. It includes target and actual values.

See: HRI Workforce Separation Full Time Equivalent by Rolling Month KPI, page 1-125 and HRI Workforce Separation Headcount by Rolling Month KPI, page 1-125

Report Parameters

You must specify values for the following parameters:

- Organization
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Location
- Job
- Grade
- Position
- Separation Category
- Separation Reason

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

HRI Workforce Separation Full Time Equivalent by Rolling Month KPI

This KPI reports on the number of separations by FTE from your organization in the previous rolling month.

Business Questions

Tell me when my workforce separation, by FTE, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Separation Full Time Equivalent by Rolling Month KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Separation Category, or Total Workforce Activity Type (depending on which predefined KPI level you select)

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Full Time Equivalent (FTE).

For more information, see Workforce Calculation, *Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments as separated that are:

- Linked to an employee who has left your enterprise.
- Not transferred to a different organization, suspended, or ended.
- Active at the beginning of the time period defined by the time dimension, but not active at the end of the time period.
- For the organization defined by the HR Organization parameter.
- For the separation category defined by the separation category parameter, or for the total workforce activity type defined by the total workforce activity type parameter, depending on which predefined KPI level you select.

Related Topics

Workforce Separation by Rolling Month – Status KPI PMV Report, page 1-124

HRI Workforce Separation Headcount by Rolling Month KPI

This KPI reports on the number of separations by headcount from your organization in the previous rolling month.

Business Questions

Tell me when my workforce separation, by headcount, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Separation Headcount by Rolling Month KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Separation Category, or Total Workforce Activity Type (depending on which predefined KPI level you select)

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Heacount.

For more information, see Workforce Calculation, *Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments as separated that are:

- Linked to an employee who has left your enterprise.
- Not transferred to a different organization, suspended, or ended.
- Active at the beginning of the time period defined by the time dimension, but not active at the end of the time period.
- For the organization defined by the HR Organization parameter.
- For the separation category defined by the separation category parameter, or for the total workforce activity type defined by the total workforce activity type parameter, depending on which predefined KPI level you select.

Related Topics

Workforce Separation by Rolling Month – Status KPI PMV Report, page 1-124

Employee Separation with Job Category KPI Status PMV Report

The Employee Separation with Job Category KPI Status PMV report provides a view of the HRI Employee Separation with Job Category Status KPI data.

See: HRI Employee Separation with Job Category Status KPI, page 1-127

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Job Category

- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Grade
- Position
- Separation Category
- Separation Reason

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

HRI Employee Separation with Job Category Status KPI

Use the HRI Employee Separation with Job Category Status KPI to notify a particular responsibility when the number of employees in a job category leaving your organization exceeds the predefined target levels.

For example, you can notify all users with a management responsibility when employee separation for a job category rises above 75%.

Business Questions

Tell me when the number of employees leaving a specific job category in my organization rises above my target level.

KPI Parameters

The HRI Employee Count Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category
- Workforce Measurement Type
- From Date
- To Date

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the budget measurement value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and Full–time Equivalent (FTE).

For more information, see Workforce Calculation, *Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments as separated that are:

- Linked to an employee who has left your enterprise.
- Not transferred to a different organization, suspended, or ended.
- Active at the beginning of the time period defined by the time dimension, but not active at the end of the time period.
- For the organization defined by the HR Organization parameter.

Related Topics

Employee Separation with Job Category KPI Status PMV Report, page 1-126

Workforce Count KPI Status PMV Report

The Workforce Count KPI Status PMV report provides you with a view of the HRI Workforce Headcount KPI data, including target and actual values.

See: HRI Workforce Headcount KPI, page 1-128

Report Parameters

You must specify values for the following parameters:

- Organization
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Location
- Job
- Grade
- Position

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

HRI Workforce Headcount KPI

This KPI reports on the size of your workforce.

Business Questions

Tell me when my workforce, by head count, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Headcount KPI includes the following mandatory parameters:

- Business Plan

- HR Organization

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Headcount.

For more information, see Workforce Calculation, *Configuring, Reporting, and System Administration Guide*

The KPI only counts assignments that are for the organization defined by the HR Organization parameter.

Related Topics

Workforce Count KPI Status PMV Report, page 1-128

Workforce Count Status (Job Category) KPI PMV Report

The Workforce Count Status (Job Category) KPI PMV report provides you with a view of the HRI Workforce Full Time Equivalent (Job Category) KPI data, and the HRI Workforce Head Count (Job Category) KPI data including target and actual values.

See: HRI Workforce Full Time Equivalent (Job Category) KPI, page 1-129

See: HRI Workforce Head Count (Job Category) KPI, page 1-130

Report Parameters

You must specify values for the following parameters:

- Organization
- Job Category
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Grade
- Position

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

HRI Workforce Full Time Equivalent (Job Category) KPI

This KPI reports on the size of your workforce (FTE) within specific job categories

Business Questions

Tell me when my workforce for a job category, by FTE, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Full Time Equivalent (Job Category) KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Full Time Equivalent (FTE).

For more information, see Workforce Calculation, *Configuring, Reporting, and System Administration Guide*

The KPI only counts assignments that are:

- For the organization defined by the HR Organization parameter.
- For the job category defined by the Job Category parameter.

Related Topics

Workforce Count Status (Job Category) KPI PMV Report, page 1-129

HRI Workforce Head Count (Job Category) KPI

This KPI reports on the size of your workforce (Head Count) within specific job categories.

Business Questions

Tell me when my workforce for a job category, by head count, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Headcount KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Headcount.

For more information, see Workforce Calculation, *Configuring, Reporting, and System Administration Guide*

The KPI only counts assignments that are:

- For the organization defined by the HR Organization parameter.
- For the job category defined by the Job Category parameter.

Related Topics

Workforce Count Status (Job Category) KPI PMV Report, page 1-129

Separations By Competency Report

Run this report from the Separations by Leaving Reason report.

When employees leave your enterprise you lose the competencies they possess. This can become a problem if you continue to lose people with the same abilities. This report investigates the competencies and levels of proficiency you are losing.

This report only includes workforce that has left your enterprise. It does not include workforce that has transferred to a different area of your enterprise or assignments that have been ended or suspended.

This report displays information for the specific time period for which you ran the Separations By Leaving Reason report. The Separations By Leaving Reason report retrieves the time period from the Workforce Losses report.

Business Questions

What competencies have I lost due to separation?

Report Parameters

This report has no parameters.

Key Concepts

This report takes the Amount Lost from the budget value of the assignment. It gives each competence the same budget values as the assignment.

Therefore if an employee had a budget value of 2 and had the planning and teamwork competencies, each competence has a budget value of 2.

The report calculates the total losses by considering all employees who have the same competence and have left. For example, if two employees have teamwork as a competence, they are shown in the same bar of the graph. Each competence is then divided into the different levels of competencies you have lost.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Separations By Leaving Reason Report

Run this report from the Workforce Losses report.

This report enables you to investigate the different reasons why your enterprise is losing workforce. It only includes the workforce that has left your enterprise. It does not include workforce that has transferred to a different area of your enterprise or assignments that have ended or been suspended.

The report is run for the specific time period you selected in the Workforce Losses report.

If you want to investigate the relationship between how long employees stay with your enterprise and their reason for leaving, use the related Separations by Service Band report.

If you want to investigate proficiency levels for the types of competencies you are losing, use the Separations by Competence report.

Business Questions

Why are employees leaving the enterprise?

Report Parameters

This report has no parameters.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Separations By Service Bands Report

Run this report from the Separations by Leaving Reason report.

This report investigates the relationship between the reasons people give for leaving and the amount of time they have been with your enterprise.

This report only includes workforce that has left your enterprise. It does not include workforce that has transferred to a different area of your enterprise or assignments that have been ended or suspended.

> **Note:** When you run this report, you are running it from the Separations By Leaving Reason report. The information this report displays is based on this report, not the original Workforce Summary report. For example, the report displays information for the time period you specified for the Separations By Leaving Reason report.

Business Questions

Why are employees leaving the enterprise and is the reason related to period of service?

Report Parameters

This report has no parameters.

Key Concepts

The report measures the losses and gains for the service bands by the length of employment in the enterprise, not the length of employment in the organization.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Separations Trend Reports

Run these reports from the Workforce Losses report.

Both of the Separations Trend reports include people who have left your enterprise. They do not include workforce that has transferred to a different area of your enterprise or assignments that have been ended or suspended.

Both reports run for the specific time period you selected in the Workforce Losses report.

Separations Trend By Leaving Reason Report

Use this report to investigate the trends in why people are leaving your enterprise.

Separations Trend By Service Band Report

Use this report to investigate the trends in the length of time employees remain with your enterprise.

Business Questions

Why are employees leaving the enterprise and how does that vary over time?

What is the composition of those leaving and how does the composition change over time?

Report Parameters

These reports have no parameters.

Key Concepts

The Separations Trend by Service Band report measures losses and gains for the service bands by the length of employment in the enterprise, not the length of employment in the organization.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Comparison Report

The workforce assigned to different types of jobs can vary over time. This report compares the workforce assigned to up to three job categories over time. For example, you can compare the number of managers against the number of technical staff you employed last year.

To investigate the percentage of employees for different job categories rather than the absolute amount, run the related Workforce Ratio report from this report.

Click on the time period to compare the workforce for a specific time period.

Business Questions

How does the head count or full-time equivalent of groups of employees change over time and how do the groups compare with each other?

Report Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job Category 1
- Job Category 2
- Job Category 3
- Grade
- Budget Measurement Type
- Frequency
- Reporting Dates

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Gains Report

Run this report from the Workforce Summary Analysis report.

Organizations within your enterprise may be gaining workforce for different reasons. This report investigates whether workforce is increasing because:

- New employees are being hired by your enterprise.
- Existing employees are being given new assignments in different parts of your enterprise.
- Existing employees are transferring assignments to different parts of your enterprise.
- Employees' assignments are being re-activated from suspended to active.

Click on a particular time period to investigate the gains made month by month.

Business Questions

How many people are joining my organization over time?

Report Parameters

This report has no parameters.

Headings and Calculations

The Workforce Gains report shows the following types of gains:

- **New Hires**

  New employees who have started to work for your enterprise.

- **New Assignments**

  New assignments created for employees who already work for your enterprise. The start date of the assignment is not the same as the start date of the employee.

- **Transfer In**

  Existing employee assignments that transfer into the reporting organization or organizations from an organization outside the scope of the report.

- **Re-activated**

  Assignments in which the status has changed from Suspended to Active. For example, when an employee has returned after a sabbatical.

The last change of assignment before the end of each frequency period determines the category in which an employee is included. For example, if in a monthly frequency period, an employee is hired, transferred out of the organization or organizations, and then transferred in again, the employee would be in the Transfer In category.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Losses Report

Run this report from the Workforce Summary Analysis report.

This report investigates the different reasons you are losing workforce within your enterprise.

Click on a time period to run the Losses report for a specific time period and see the losses made month by month.

Click in the Separated column to run the Separations By Leaving Reason report and investigate the reasons for workforce leaving your enterprise.

You can also access the following related reports:

- **Separations Trend by Leaving Reason report**

  This report investigates the trends in reasons for workforce leaving your enterprise.

- **Separations Trend By Service Band report**

  This report investigates the time periods for which your workforce was employed before leaving your enterprise.

Business Questions

Am I losing workforce because workforce is transferring to different parts of my enterprise, current employee assignments are ending, employee assignments are being suspended, or because employees are leaving my enterprise?

Report Parameters

This report has no parameters.

Headings and Calculations

The Workforce Losses report shows the following types of losses:

- **Separations**

  Employees who have finished working for any part of your enterprise.

- **Ended Assignments**

  Assignments that are no longer active or suspended, but the employee is still with your enterprise.

- **Transfer Out**

  Employees and assignments that have transferred to an organization outside the scope of the report.

- **Suspended**

  The employee status has changed from Active to Suspended. For example, an employee has taken maternity leave.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Ratio Report

The workforce assigned to different types of jobs can vary over time. This report compares the percentage of workforce assigned to up to three job categories over time. For example, you could compare the percentage of managers against the percentage of technical staff you employed last year.

If you want to investigate the absolute number of employees for different job categories rather than the percentage of employees, you can run the related Workforce Comparison report from this report.

Click on the time period to compare the workforce for a specific time period.

Business Questions

How does the head count or full-time equivalent of groups of employees change over time and how do the groups compare with each other?

Report Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job Category 1
- Job Category 2
- Job Category 3
- Grade
- Budget Measurement Type
- Frequency
- Reporting Dates

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Workforce Summary Analysis Report

This report is the first in a suite of reports that enables you to investigate workforce in your enterprise. You can review the losses, gains and total workforce you have in different organizations within your enterprise.

You can run the Workforce Summary Analysis report for each organization. If you select Yes in the Rollup Each Organization parameter, the report will use the selected organization, and all its subordinates. If you select No in the Rollup Each Organization parameter, the report will use the selected organization, and does not include its subordinates.

Within the report, you can investigate:

- Monthly breakdowns of the workforce, by clicking on a specific time period.
- The different gains in workforce, by clicking on the report column heading Gains. This action runs the Workforce Gains report.
- The different losses in workforce, by clicking on the report column heading Losses. This action runs the Workforce Losses report.

Business Questions

How is my workforce changing over time?

Report Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organization?
- Business Plan
- Area / Country / Region

- Country
- Region
- Product Category
- Job Category
- Job
- Budget Measurement Type
- View By
- Frequency
- Reporting Dates

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Organization Separation Report

This report investigates the performance of your best and worst organizations based on the workforce separation. This can be an absolute figure or a percentage of the workforce for the organization.

Click on the organization name in the table to investigate the workforce changes for an organization.

Business Questions

How many people are leaving my organizations?

Report Parameters

Before you run the report you must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Budget Measurement Type
- Separation Reason
- Display

  When considering performance, you can select to display the top organizations; these are the organizations with the greatest increase or least decrease in Workforce. Alternatively, you can select the bottom organizations; these are the organizations with the lowest increase or greatest decrease in Workforce.
- Order By
- Reporting Dates

You can investigate up to 99 organizations in a section of your enterprise. This gives you the ability to consider the best 10 performers in a small section of your enterprise, or the worst 50 performers in a larger section of your enterprise.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 1-67

Annualized Turnover

This report displays the annualized employee headcount turnover for the selected top line manager. The report categorizes turnover as either voluntary or involuntary.

The report displays one row for each direct report of the top line manager, if that direct report has at least one subordinate and a row for the direct reports. The report also displays managers who have a zero headcount as they had some activity in the reporting period such as hires, terminations, or transfers. The Grand Total value displays the total for the manager selected in the Manager parameter.

Depending on the setting in the HRMS: Workforce Turnover Calculation Method profile option, the application uses the headcount at the end of the reporting period or the average of the headcount at the start and headcount at the end of the reporting period to calculate the turnover. Turnover is calculated as total termination in a selected reporting period divided by headcount.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

This report includes the following headings and calculations:

- **Manager:** The employee's current manager. You can access the Annualized Turnover (for a specific manager) report from the Manager column.
- **Total:** The total percentage of headcount turnover. You can access the Annualized Turnover Status report, page 1-140 from the Total column values. The Annualized Turnover Status report displays values as well as percentages.

  The Period Type you select affects the turnover displayed:

  - **Rolling 7 Days:** The total turnover within the previous 7 days * 52.14 based on the selected date.
  - **Rolling 30 Days:** The total turnover within the previous 30 days * 12.16 based on the selected date.
  - **Rolling 90 Days:** The total turnover within the previous 90 days * 4 based on the selected date.
  - **Rolling 365 Days:** The total turnover within the previous 365 days based on the selected date.

    Note: Depending on the period type you select the annual turnover may exceed 100%.

- **Change:** The actual change in turnover calculated as:

  Current Turnover - Previous Turnover

If you select a comparison type of Prior Period in the Compare To parameter, the Previous Turnover is the turnover 7, 30, 90, or 365 days prior to your selected date, depending on the Period Type you have selected.

If you select a comparison type of Prior Year, the Previous Turnover is the turnover a year prior to your selected date.

Annualized Turnover Status

You access this report from the Total column in the Annualized Turnover report.

The totals in this report are consistent with other turnover reports and turnover KPIs. The report also displays the percentage annualized turnover for the top line manager selected on the parameter page portlet. The report displays one row for each direct report of the top line manager, if that direct report has at least one subordinate and one row for the direct reports. The report also displays the start and the end headcount for the direct reports of the selected manager for the selected reporting period.

Depending on the setting in the HRMS: Workforce Turnover Calculation Method profile option, the application uses the headcount at the end of the reporting period or the average of the headcount at the start and headcount at the end of the reporting period to calculate the turnover. Turnover is calculated as total termination in a selected reporting period divided by headcount.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

The table comprises the following columns:

- **Headcount Start**: Displays the headcount at the start of the reporting period.
- **Headcount End:** The headcount at the end of the reporting period. This is calculated as:

  Start Headcount + Hires and Transfers (plus) - Terminations and Transfers (minus)
- **Voluntary Terminations:** The number of voluntary terminations during the reporting period.
- **Voluntary Percent:** The percentage change in voluntary employee turnover in this reporting period compared with the preceding reporting period. This is calculated as:

  (Total voluntary turnover this reporting period -Total voluntary turnover preceding reporting period)*100/(Total voluntary turnover preceding reporting period)
- **Involuntary Terminations:** The number of involuntary terminations during the reporting period.
- **Involuntary Percent:** The percentage change in involuntary employee turnover in this reporting period compared with the preceding reporting period. This is calculated as:

  (Total involuntary turnover this reporting period -Total involuntary turnover preceding reporting period)*100/(Total involuntary turnover preceding reporting period)

- **Total Terminations:** The total number of terminations during the reporting period.
- **Total Percent:** The percentage change in total employee turnover in this reporting period compared with the preceding reporting period. This is calculated as:

  (Total turnover this reporting period -Total turnover preceding reporting period)*100/(Total turnover preceding reporting period)

Calculations are based on assignments active at the separation date.

You can access the Turnover Detail report, page 1-146 from the values in the Voluntary Terminations, Involuntary Terminations, and Total Terminations columns.

Annualized Turnover Trend

This report shows changes in the annualized employee headcount turnover over time for the selected top line manager. The report categorizes turnover into voluntary and involuntary separations.

The report aggregates turnover. The aggregates include all the subordinates of the top line manager, but exclude the top line manager.

Depending on the setting in the HRMS: Workforce Turnover Calculation Method profile option, the application uses the headcount at the end of the reporting period or the average of the headcount at the start and headcount at the end of the reporting period to calculate the turnover. Turnover is calculated as total termination in a selected reporting period divided by headcount.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

This report includes the following headings and calculations:

- **Total:** The total percentage of headcount turnover.

  The Period Type you select affects the turnover displayed:

  - **Rolling 7 Days:** The total turnover within the previous 7 days * 52.14 based on the selected date.
  - **Rolling 30 Days:** The total turnover within the previous 30 days * 12.16 based on the selected date.
  - **Rolling 90 Days:** The total turnover within the previous 90 days * 4 based on the selected date.
  - **Rolling 365 Days:** The total turnover within the previous 365 days based on the selected date.

Headcount

This report displays the total employee headcount of the direct reports for the selected top line manager.

The report displays one row for each direct report of the top line manager, if that direct report has at least one subordinate and one row for the direct reports.

The end date of the reporting period is the date you have selected in the date parameter, and the start date is 7, 30, 90, or 365 days prior to your selected date, depending on the Period Type you have selected.

The Headcount column displays the headcount value for your selected date. The report also displays managers who have a zero headcount as they had some activity in the reporting period such as hires, terminations, or transfers.

The Hire, Transfer (plus), Termination and Transfer (minus) columns display headcount activity over the selected period. The report also shows the headcount values at the start and end of the selected period. The Transfer (Plus) and the Transfer (Minus) columns display the total number of transfers in and out of the manager's hierarchy and not within the hierarchy. For the top line manager, if people are moved around within the same hierarchy, but are still under the same main manager then this is not counted in the grand total for transfers in and out columns, and it will not impact the end headcount either. For example, top line manager A has managers B and C reporting to him. B has D and E as his reports. If D and E start reporting to C, the transfer and end headcount values will change for B and C, they will not change for A, as A has not lost or gained any persons. When you select B or C you can view the changes in the transfers.

The Termination column is the sum of the headcount of all assignment ends in the reporting period. This includes the assignment ends that occur at the same time as a termination and those that are not necessarily part of a termination. For example, employees John Smith, Sara Brown and Anna Scott report to Allen Matthew. They each have a primary and secondary assignment and all assignments have a headcount value of 1. John Smith is terminated on 27-Jul-2003 (ending his primary assignment) and his secondary assignment ended on 21-Jan-2003. Sara Brown is terminated on 16-Jul-2003 (both assignments ended on that date). Anna Scott is a current employee, however her secondary assignment ended on 20-Jul-2003. If you run the report with an effective date of 31-Jul-2003 and with a period type of Rolling 365 days the Headcount report will show 5 terminations and the Turnover report will show 3. The Headcount report shows all assignment ends in the period: John Smith's two assignments, Sara Brown's two assignments and Anna Scott's second assignment end. The Turnover Detail report , page 1-146 includes the assignments that ended on the termination date: John Smith's primary assignment that ended on his termination date and both of Sara Brown's assignments (because they both ended on the same day).

The Grand Total value displays the total for the manager selected in the Manager parameter. Drill reports are available from the values in these columns.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

This report uses the following headings and calculations:

- **Manager:** You can access the Headcount (for a specific manager) report available from the names in the Manager column.
- **Start Headcount:** Displays the headcount at the start of the reporting period.

- **Hire (Plus):** The total headcount hired over the reporting period. You can access the Headcount Hire Detail report , page 1-144available from the Plus-Hire column values.
- **Transfer (Plus):** The total headcount transferring in during the reporting period. You can access the Headcount Transfer (Plus) Detail report , page 1-143 available from the Plus-Transfer column values.
- **Transfer (Minus):** The total headcount transferring out during the reporting period. You can access the Headcount Transfer (Minus) Detail report , page 1-144 available from the Minus-Transfer column values.
- **Termination (Minus):** The total headcount terminated during the reporting period. You can access the Headcount Termination Detail report , page 1-145 available from the Minus-Termination column values.
- **End Headcount:** The headcount at the end of the reporting period, calculated as:

  Start Headcount + Hires and Transfers (Plus) - Terminations and Transfers (Minus)
- **Net:** The difference between the Plus and Minus columns and the difference between Start and End columns
- **Change:** The percentage change in the headcount over the reporting period, calculated as:

  (Current Headcount - Previous Headcount)* 100/Previous Headcount

Headcount Transfer (Plus) Detail

You access this report from the Plus-Transfer column in the parent Headcount report. The report displays the employee records that comprise the total value you drilled from in the Headcount report, including transfers and reorganizations.

The report provides information about employees who have moved into the selected manager's hierarchy.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

The report includes the following columns:

- **Name:** The employee's name.
- **Manager:** The employee's current manager.
- **Department From:** The employee's previous organization, if any.
- **Department To:** The employee's current organization. Note that the previous and current departments can be the same.
- **Transfer Date:** Transfer date of an employee.

Headcount Hire Detail

You access this report from the Plus-Hire column in the Headcount report. This report lists the records that comprise the Plus-Hire value you drilled from in the Headcount report, including hires, re-hires and secondary assignment starts.

The report shows employees who have been hired or re-hired into a named manager's hierarchy in a given period, including secondary assignment starts, and contractors who become employees. Secondary assignment starts are included only if the secondary assignment is given an assignment value or is included in the fast formula. The report excludes people who have a zero headcount value.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

This report includes the following headings:

- **Name:** The employee's name.
- **Manager:** The employee's current manager.
- **Department:** The employee's current organization.
- **Country:** The employee's country, based on the assignment location.
- **Job:** The employee's job title.
- **Hire Date**: The employment start date.

Headcount Transfer (Minus) Detail

You access this report from the Minus-Transfer column in the parent Headcount report.

The report displays the employee records that comprise the total value you drilled from in the Headcount report, including transfers and reorganizations. The report provides information about employees who have moved out of the selected manager's hierarchy.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Page Parameters, page 1-9

Report Headings and Calculations

This report includes the following headings:

- **Name:** The employee's name.
- **Manager:** The employee's current manager.
- **Department From:** The employee's previous organization, if any.
- **Job:** The employee's job title.
- **Hire Date:** Employment start date.

- **Transfer Date:** The last day of the reporting to the current manager.
- **Length of Service (Years):** This will be the employee's last period of service, excluding all previous periods of service. For example, if an employee works for 5 years from 1990 to 1995, then leaves the enterprise, and returns to work between 1997 and 1999, the application considers the last period of service of 2 years as the length of service. The application displays the length of service (period between the hire date and the end date) for a person and not the period of different assignment/s that the person holds.

Headcount Termination Detail

You access this report from the Minus-Termination column in the parent Headcount report.

The report displays the employee records that make up the total value you drilled from in the Headcount report. The report lists employees who have terminated from the manager's hierarchy in the given period, together with supporting details.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

The report includes the following columns:

- **Name:** The employee's name.
- **Department:** The employee's current organization
- **Job:** The employee's job title
- **Hire Date:** Employment start date.
- **Termination Date:** This will be empty for secondary assignment ends
- **Termination Reason:** This will be empty for secondary assignment ends.
- **Length of Service (Years):** This will be the employee's last period of service, excluding all previous periods of service. For example, if an employee works for 5 years from 1990 to 1995, then leaves the enterprise, and returns to work between 1997 and 1999, the application considers the last period of service of 2 years as the length of service. The application displays the length of service (period between the hire date and the end date) for a person and not the period of different assignment/s that the person holds.

Headcount by Country Trend

This report shows changes in headcount over time for the four countries with the highest headcount for the selected top line manager.

The report displays the total headcount for all subordinates of the top line manager within each country. and excludes the top line manager from the total.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

There are no calculations in this report.

Turnover Detail

You can access this report from the Annualized Turnover Status report. This report lists the ex-employees who comprise the value you drilled from. The report is the sum of the headcount of assignment ends that occur at the same time as a termination.

Report Parameters

This report uses only the page parameters. For information on how page parameters affect the report, see: Parameters, page 1-9

Report Headings and Calculations

The table comprises the following columns:

- **Job:** The employee's job title.
- **Hire Date:** The employment start date.
- **Termination Date:** The employment end date.
- **Termination Reason:** The employee's leaving reason.
- **Length of Service (Years):** This will be the employee's last period of service, excluding all previous periods of service. For example, if an employee works for 5 years from 1990 to 1995, then leaves the enterprise, and returns to work between 1997 and 1999, the application considers the last period of service of 2 years as the length of service. The application displays the length of service (period between the hire date and the end date) for a person and not the period of different assignment/s that the person holds.

Recruiting and Hiring Intelligence

Key Concepts for Recruiting and Hiring Intelligence

The following concepts enable you to accurately interpret the results of the Recruiting and Hiring reports.

Discoverer Workbook Calculations

The predefined recruiting and hiring workbooks, in addition to displaying information set up within Oracle HRMS, calculate the following:

- **New Applicants**

  The number of applicants for the vacancy who have the status of active application.

- **Terminations**

  The number of applicants whose applicant assignment has ended, and for whom an employee assignment has not been created.

- **Offers**

  The number of applicants that have the status of Offer.

  > **Note:** Applicants can have only one status at any time, therefore the number of offers represents offers which have been made and not yet accepted; it does not include offers which have subsequently been accepted.

- **Accepts**

  The number of applicants that have the status of Accept.

- Hired

  The number of applicant assignments that have been converted to employee assignments, regardless of whether the applicant already works for your enterprise.

- **Still Employed**

  The number of applicant assignments that have been converted to employee assignments that are currently active.

- **Applicant Age**

  The current age of the applicant, not their age when they applied for the vacancy.

Note: Applicants must have a birth date set up to be included in the worksheet. You cannot enter a date of birth on the Applicant Quick Entry window, so you must use the People window to set this up.

- **Days to Fill Vacancy**

  The number of days from opening the vacancy until an applicant is hired.

Key Concepts for Recruiting and Hiring PMV Reports

The following concepts affect the Recruiting and Hiring PMV reports.

Budget Measurement Types for KPIs

All predefined KPIs consider only those vacancies which have values set up for the Budget Measurement Type of HEAD for head count, and FTE for Full–time Equivalent.

Note: You set Budget measurement values by using the Lookup type of BUDGET_MEASUREMENT_TYPE on the HRMS Requisition and Vacancy window.

To see the success of your recruitment for all vacancies, you must use the same Budget Measurement Type for all vacancies. For example, use FTE as the Budget Measurement Type for all vacancies.

Percentage Recruitment Success

To compare actual recruitment success against your target, the reports define recruitment success as the percentage of vacancies filled compared to openings.

Vacancies

The reports calculate vacancies by totaling the Budget Measurement Value of the relevant vacancies within the time dimension of the target.

Filled Vacancies

The reports calculate filled vacancies total by totaling the workforce created to fill the vacancies.

The reports calculate workforce by using assignments. They calculate the worth of each assignment by using the Budget Measurement Value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and FTE.

For more information, see: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Guidelines for Recruitment Targets

Use the following guidelines when setting up targets for the HRI Recruitment Success (Starts) Status KPI

- **Percentage success**

  Enter the target as a percentage of the success you expect. For example, enter 70 if the recruitment success target is 70%.

- **Below Target Values**

Only set up Below Target values in the ranges for each notification responsibility. For example, if you enter 10% in the Below Target field, and the target is 70%, the KPI sends a notification when the recruitment success falls below 63%.

The HRI Recruitment Success (Starts) Status KPI indicates when recruitment falls below the targets level. Do **not** set up Above Target values.

Applicant Time to Start Comparison Workbook

This workbook analyses the days required to fill vacancies within a recruitment activity. It only reports on job applicants that have been hired.

Business Questions

How efficient is my recruitment process?

Worksheets

The workbook contains the following worksheets:

- By Ethnic Group (United States specific)
- By Ethnic Origin (United Kingdom specific)
- By Gende
- By Job
- By Grade
- By Organization
- By Location
- By Vacancy

Workbook Parameters

This workbook does not use parameters.

Workbook Headings and calculations

The workbook uses the following calculation:

Average Days to Fill Vacancy

This calculation provides the Average Days from Vacancy Start to Hire; it is based on the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 1-147

Application Termination Analysis Workbook

This workbook investigates the reasons your enterprise has terminated applications for different vacancies and individual applicants. The workbook only includes terminated applications.

Business Questions

Why are applicants dropping out of the recruitment process?

Worksheets

This workbook contains the following worksheets:

- Termination Details
- Termination Reasons by Vacancy

Workbook Parameters

This workbook does not use parameters.

Workbook Headings and calculations

The workbook does not use any calculations.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 1-147

Applications Analysis Workbook

This workbook investigates the applications for vacancies within your enterprise.

You can investigate the following by vacancy, recruitment, and applicant status:

- Number of openings for a vacancy
- New applicants
- Applications which have been terminated
- Offers to applicants
- Accepted offers
- Number of applicants hired

Parameters

The workbook does not use parameters.

Worksheets

This workbook has the following worksheets:

- Age Analysis, page 1-151
- Applicant Status, page 1-151

- Recruitment Activity Summary, page 1-151
- Vacancy Summary, page 1-151

Age Analysis Worksheet

This worksheet enables you to investigate the current age of applicants for a particular vacancy.

Business Questions

What is the age spread of my applicants?

Worksheet headings and calculations

This worksheet does not use calculations.

Applicant Status Worksheet

This worksheet enables you to investigate the applications that exist for a Business Group, requisition, and recruiter.

Business Questions

What is the status of my applicants?

Worksheet headings and calculations

This worksheet does not use calculations.

Recruitment Activity Summary Worksheet

This worksheet enables you to investigate recruitment activities within your Business Group. You can analyze the current status of recruitment activities, for example, the number of new applicants, the number of offers made, and the number of terminated applicants. You can view recruitment activity information for a Business Group, requisition, vacancy, and recruitment type.

Business Questions

How many applicants are there at each recruitment stage?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires**

  Populates the Hires column in the worksheet with the number of applicants that have been hired into the vacancy from the recruitment activity.

Vacancy Summary Worksheet

This worksheet enables you to investigate vacancies within your Business Group. You can analyze the current status of vacancies, for example, the number of remaining applicants, the number of new applicants, and the number of terminated applicants. You can view vacancy information for a Business Group, recruitment type, and recruitment activity.

Business Questions

How many applicants are there at each recruitment stage?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires**

  Populates the Hires column in the worksheet with the number of applicants that have been hired into the vacancy from the recruitment activity.

- **Planned Cost with Currency**

  Populates the Planned Cost with Currency page item in the worksheet. It is a concatenation of planned cost and currency code.

- **Actual Cost with Currency**

  Populates the Actual Cost with Currency page item in the worksheet. It is a concatenation of actual cost and currency code.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 1-147

Recruitment Efficiency Analysis Workbook

This workbook analyses vacancy ratios, vacancy ratios by recruitment activity, recruitment activity ratios, and hires versus openings summary for recruitment within your enterprise.

Parameters

The workbook does not use parameters.

Worksheets

This workbook has the following worksheets:

- Vacancy Ratios, page 1-152
- Vacancy Ratios by Recruitment Activity, page 1-153
- Recruitment Activity Ratios, page 1-153
- Hires versus Openings Summary, page 1-154

Vacancy Ratios Worksheet

Business Questions

How successful is my recruitment?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Hires/Offers**

  Populates the Hires / Offers column with the percentage of hires who are still employed as of the system date, against the number of offers made.

- **Vacancy/Offers**

  Populates the Hires / Openings column with the percentage of vacancy hires, against the number of openings.

- **Hires/Openings**

  Populates the Hires / Openings column with the percentage of hires who are still employed as of the system date, against the number of initial openings.

- **Vacancy Hires**

  Populates the Hires column with the number of applicants who have been made an offer for a vacancy.

Vacancy Ratios by Recruitment Activity Worksheet

Business Questions

How many applicants are there at each recruitment stage?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires/Openings**

  Populates the Hires / Openings column with the percentage of recruitment activity hires, against the number of openings.

- **Recruitment Activity Vacancy Offers/Recruitment Activity Vacancy Hires**

  Populates the Hires / Opening column with the percentage of hires, against the number of offers made.

- **Recruitment Activity Vacancy Hires**Populates the Hires column with the number of applicants that have been hired into the vacancy from the recruitment activity.

- **Recruitment Activity Vacancy Offers**Populates the Offers column with the number of applicants that have been made offers via the recruitment activity.

- **Cost per Hire**

  Populates the Cost per Hire column with the actual cost of recruitment activity divided by the number of successful recruitments using that activity.

Recruitment Activity Ratios Worksheet

Business Questions

How successful is my recruitment?

How much does my recruitment cost?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Hires/Recruitment Activity Offers**

  Populates the Hires / Opening column with the percentage of hires, against the number of offers made.

- **Recruitment Activity Offers**Populates the Offers column with the number of offers made from a recruitment activity.

- **Cost per Hire**

  Populates the Cost per Hire column with the actual cost of recruitment activity divided by the number of successful recruitments using that activity.

- **Recruitment Activity Hires**Populates the Recruitment Activity Hires column with the number of hires a recruitment activity has achieved.

Hires versus Openings Summary Worksheet

Business Questions

How successful is my recruitment?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires/Openings**

  Populates the Hires / Offers column with the percentage of recruitment activity hires, against the number of openings.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 1-147

Vacancy Hire Success (Organization Hierarchy) Status Analytics workbook

The Vacancy Hire Success (Organization Hierarchy) Status Analytics workbook provides a status analysis comparing the changes in vacancy success across organizations in your enterprise, or across geographical areas. You can analyze the:

- Total number of openings recorded for vacancies.
- Total number of openings that have been filled.

This workbook also enables you to view the success of your recruitment activities.

The workbook calculates the total number of vacancy openings and the number of filled vacancies in a particular time period, to produce a vacancy success rate. Vacancy success is defined as the percentage of vacancy openings that are filled.

The workbook only includes vacancies that have a status of Closed and have an End Date within the selected time period.

The workbook only includes assignments that match the criteria selected in the workbook parameters. For example, an assignment must have the same budget measurement value as the worksheet parameter.

Business Questions

How many vacancies have there been in my enterprise within a specific geographical area?

How many of these vacancies have been filled? How does this compare with other geographical areas?

Parameters

Before running the worksheets you must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following parameters to further restrict the values in the workbook:

- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Organization
- By Geography Area

The worksheets display one row for each grouping. For example, the by Organization worksheet displays one row per organization.

Headings and Calculations

All worksheets contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Organization worksheet, this column is named "Organization".

- **Openings**

  The number of openings for each group.

- **Employee Starts**

The number of employee starts for each group. The worksheets calculate the Employee Starts total by totaling the employee assignments created to fill the vacancies.

- **Success Rate Percent**

  Displays the total workforce starts as a percentage of total workforce openings.

The worksheets count employee assignments using Workforce, enabling you to define the employee value of each assignment. See: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 1-147

Vacancy Hire Success (Organization Hierarchy) Trend Analytics Workbook

The Vacancy Hire Success (Organization Hierarchy) Trend Analytics workbook provides a trend analysis showing the changes in vacancy success over a selected period of time. You can analyze the:

- Total number of openings recorded for vacancies.
- Total number of openings that have been filled.

This workbook also enables you to view the success of your recruitment activities.

The workbook calculates the total number of vacancy openings and the number of filled vacancies in a particular time period, to produce a vacancy success rate. Vacancy success is defined as the percentage of vacancy openings that are filled.

The workbook only includes vacancies that have a status of Closed and have an End Date within the selected time period.

The workbook only includes assignment that match the criteria selected in the workbook parameters. For example, an assignment must have the same budget measurement value as the worksheet parameter.

Business Questions

How many vacancies have there been in my enterprise over, for example, the last quarter?

How many of these vacancies have been filled? How does this compare with the previous quarter?

Parameters

Before running the worksheets you must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

Use the following parameters to further restrict the values in the workbook:

- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month

The worksheets display one row for each time period. For example, the by Month worksheet displays one row per month.

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **A time period column**

  The heading depends on the selected worksheet, for example, in the by Year worksheet, this column is named “Year”.

- **Openings**

  The number of openings within the time period.

- **Employee Starts**

  The number of employee starts within the time period. The worksheets calculate the Employee Starts total by totaling the employee assignments created to fill the vacancies

- **Success Rate Percent**

  Displays the total workforce starts as a percentage of total workforce openings.

The worksheets count employee assignments using Workforce, enabling you to define the employee value of each assignment. See: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Vacancy Hire Success (Organization Hierarchy) Template Analytics Workbook

The Vacancy Hire Success (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating vacancy success over yearly periods, the other providing a detailed analysis of vacancy success in the workforce.

These worksheets help you to create reports to analyze the success of your recruitment activities. Recruitment success is defined as the percentage of vacancy openings that are filled.

The workbook calculates the total number of vacancy openings for each year, and how many of these have been filled.

The workbook uses the Budget Measurement Value to calculate the number of openings. The worksheet Openings column displays the number of Headcounts or Full Time Equivalents (depending on your Budget Measurement Value) represented by your vacancies.

The workbook only includes vacancies that have been closed within the selected time period.

The vacancy must also match all the selection criteria. For example, if you select an organization and a job, you must have entered an organization and job for the vacancy on the HRMS Requisition and Vacancy window.

The workbook calculates the Employee Starts total by totaling the employee assignments created to fill the vacancies. HRMS Intelligence counts employee assignments using Workforce, enabling you to define the employee value of each assignment.

See: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The assignments created to fill the vacancy must match the criteria selected in the report, to appear in the Openings Filled total. For example, an assignment must have the same budget measurement value as the report parameters.

The success rate calculation is:

```
Total Workforce Measurement Value for all Employee Starts*100/Tot
al Workforce Measurement Value for Openings
```

Parameters

Before running the template worksheets you must enter a value for the following parameters:

- Start Date
- End Date

- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Workforce Measurement Type

The template includes the following optional parameters:

- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Year
- By Detail

By Year Worksheet

The by Year worksheet enables you to see vacancy success for each year.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Start Date**

  The start date of the time period.
- **End Date**

  The end date of the time period.
- **Year**

  The time period for which this worksheet is run.
- **Openings**

  The number of openings within the time period.
- **Employee Starts**

  The number of employee starts within the time period.
- **Success Rate Percent**

  Displays the vacancy success rate.

Detail Worksheet

The Detail worksheet calculates the vacancy success rates for vacancies with the same opening and closing dates, for each organization, location, job, grade, and position.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Vacancy Open Date**

  The date the vacancy opened.

- **Vacancy Close Date**

  The date the vacancy closed.

- **Openings**

  The number of openings within the vacancy open and close date, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Employee Starts**

  The number of employee starts for openings within the vacancy open and close date, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value. The worksheets calculate the Employee Starts total by totaling the employee assignments created to fill the vacancies.

- **Success Rate Percent**

  Displays the vacancy success rate. Recruitment success is a calculation of the total workforce starts as a percentage of total workforce openings.

- **Organization**

  The organization that had the vacancy.

- **Location**

  The location where the vacancy occurred.

- **Job**

  The job for which the vacancy occurred.

- **Grade**

  The grade for which the vacancy occurred.

- **Position**

  The position for which the vacancy occurred.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Recruitment by Authorizer Analysis Workbook (EDW)

The Recruitment by Authorizer Analysis workbook is designed to present the Human Resources professional with detailed recruitment related data; for example, individual authorizer activities, or number of days from start of vacancy until the hiring of the applicant is completed.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Average Days to Recruit, page 1-161
- Average Days to Recruit Over Time, page 1-161
- Average Days to Recruit by Organization, page 1-162
- Average Days to Recruit by Stage and Job Category, page 1-162
- Average Days to Recruit by Stage and Job, page 1-163
- Vacancy Activity, page 1-163

Average Days to Recruit Worksheet

The Average Days to Recruit worksheet measures the average number of days from both the vacancy start date to hire, and the application date to hire. Average values for both measures are also shown. This information is given for each recruitment authorizer within a specified top-level employing organization during a specified calendar year in which the applicant was hired.

The report is ordered by Average Days from Application to Hire, in descending order.

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit Over Time Worksheet

The Average Days to Recruit Over Time worksheet measures the average number of days from vacancy start date to hire, and application date to hire, for the past three calendar years and the current calendar year; average values for both measures are also given. This information is reported for each recruitment authorizer within a specified top-level employing organization.

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit by Organization Worksheet

The Average Days to Recruit by Organization worksheet measures both the average number of days from the vacancy start date to hire and from the application date to hire; average values for both measures are given for each organization and overall. This information is reported for each recruitment authorizer within all top-level employing organizations during a specific calendar year (the year the applicant was hired).

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit by Stage and Job Category Worksheet

The Average Days to Recruit by Stage and Job Category worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job category and each recruitment authorizer, during a specified calendar year (the year the applicant was hired).

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

No calculations are used by this worksheet.

Average Days to Recruit by Stage and Job Worksheet

The Average Days to Recruit by Stage and Job worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job and for a specified recruitment authorizer, during a specified calendar year (the year the applicant was hired).

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

No calculations are used by this worksheet.

Vacancy Activity Worksheet

The Vacancy Activity worksheet provides information for a specified authorizer on the status of each vacancy. It reports the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Business Questions

What recruitment stages have applicants for vacancies reached, by authorizer?

Parameters

You must specify values for the following parameters:

- Vacancy Start From
- Vacancy Start To

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

- **Openings Remaining**

  Populates the Openings Remaining column with the difference between the number of openings for a vacancy and the number of applicants hired.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 1-147

Recruitment by Recruiter Analysis Workbook (EDW)

The Recruitment by Recruiter Analysis workbook is designed to present the Human Resources professional with detailed recruitment related data; for example, individual recruiter activities, or number of days from start of vacancy until the hiring of the applicant is completed.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Average Days to Recruit, page 1-164
- Average Days to Recruit Over Time, page 1-165
- Average Days to Recruit by Organization, page 1-165
- Average Days to Recruit by Stage and Job Category, page 1-166
- Average Days to Recruit by Stage and Job, page 1-166
- Vacancy Activity, page 1-166

Average Days to Recruit Worksheet

The Average Days to Recruit worksheet measures the average number of days from both the vacancy start date to hire, and the application date to hire. Average values for both measures are also shown. This information is given for each recruiter within a specified top-level employing organization during a specified calendar year in which the applicant was hired.

The report is ordered by Average Days from Application to Hire, in descending order.

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit Over Time Worksheet

The Average Days to Recruit Over Time worksheet measures the average number of days from vacancy start date to hire, and application date to hire, for the past three calendar years and the current calendar year; average values for both measures are also given. This information is reported for each recruiter within a specified top-level employing organization.

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit by Organization Worksheet

The Average Days to Recruit by Organization worksheet measures both the average number of days from the vacancy start date to hire and from the application date to hire; average values for both measures are given for each organization and overall. This information is reported for each recruiter within all top-level employing organizations during a specific calendar year (the year the applicant was hired).

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit by Stage and Job Category Worksheet

The Average Days to Recruit by Stage and Job Category worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job category and each recruiter, during a specified calendar year (the year the applicant was hired).

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

No calculations are used by this worksheet.

Average Days to Recruit by Stage and Job Worksheet

The Average Days to Recruit by Stage and Job worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job and for a specified recruiter, during a specified calendar year (the year the applicant was hired).

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

No calculations are used by this worksheet.

Vacancy Activity Worksheet

The Vacancy Activity worksheet provides information for a specified recruiter on the status of each vacancy. It reports the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Business Questions

What recruitment stages have applicants for vacancies reached, by recruiter?

Parameters

You must specify values for the following parameters:

- Vacancy Start From
- Vacancy Start To

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

- **Openings Remaining**

  Populates the Openings Remaining column with the difference between the number of openings for a vacancy and the number of applicants hired.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 1-147

Workforce Recruitment Stage Analysis Workbook (EDW)

The Workforce Recruitment Stage Analysis workbook is designed to report on the details of each stage of a recruitment activity, such as first interview, offer, and acceptance.

Worksheets

This workbook has the following worksheets:

Recruitment by Organization Worksheet

The Recruitment by Organization worksheet provides a recruitment summary for a specified top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.
- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

Show me the total gains for all organizations in the primary hierarchy of a Business Group.

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Recruitment by Age Band Worksheet

The Recruitment by Age Band worksheet provides a recruitment summary by age band for a selected top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.
- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

How many applicants are in a known minority age group, as a ratio of all applicants?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Recruitment by Disability Status Worksheet

The Recruitment by Disability Status worksheet provides a recruitment summary by disability status (disabled, not disabled, or undefined) for a selected top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.
- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

How many applicants are in a known minority group (disability status) as a ratio of all applicants?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Recruitment by Gender Worksheet

The Recruitment by Gender worksheet provides a recruitment summary by gender for a selected top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.

- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

How many applicants are in a known minority gender group as a ratio of all applicants?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Recruitment by Location Worksheet

The Recruitment by Location worksheet provides a recruitment summary by location for a selected top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.
- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

How is my recruitment activity spread over different enterprise locations?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Vacancy Activity Worksheet

The Vacancy Activity worksheet provides information for a specified top-level employing organization on the status of each vacancy; for example, the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Business Questions

How many open vacancies do I have?

Show me the number of applicants for each vacancy.

Parameters

You must specify values for the following parameters:

- Vacancy Start From
- Vacancy Start To

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

- **Openings Remaining**

  Populates the Openings Remaining column with the difference between the number of openings for a vacancy and the number of applicants hired.

Vacancy Activity by Job Worksheet

The Vacancy Activity by Job worksheet provides information for a specified top-level employing organization and job on the status of each vacancy; for example, the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Business Questions

How many open vacancies do I have?

Show me the number of applicants for each vacancy.

Parameters

You must specify values for the following parameters:

- Vacancy Start From
- Vacancy Start To

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Average Days to Fill**

  Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

- **Openings Remaining**

  Populates the Openings Remaining column with the difference between the number of openings for a vacancy and the number of applicants hired.

Efficiency (Average Days) Worksheet

The Efficiency (Average Days) worksheet provides information concerning the recruitment efficiency of each top-level employing organization for a specified calendar year. It reports the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

Show me the average time to hire/offer/first interview by job, location, etc.

What is the average time to offer/rejection by job, location, etc?

From which locations/jobs do we have the greatest difficulty (based on average time to hire) or the greatest cost in hiring?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses no calculations.

Average Days to Recruit by Stage and Job Category Worksheet

The Average Days to Recruit by Stage and Job Category worksheet provides recruitment information for each job category in a top-level employing organization within a specified calendar year. It reports the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

Show me the average time to hire/offer/first interview by job, location, etc.

What is the average time to offer/rejection by job, location, etc?

From which locations/jobs do we have the greatest difficulty (based on average time to hire) or the greatest cost in hiring?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses no calculations.

Average Days to Recruit by Stage and Job Worksheet

The Average Days to Recruit by Stage and Job worksheet provides recruitment information for each job (for example, Line Manager or Sales Person) in a top-level employing organization within a specified calendar year. You can report on the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

Show me the average time to hire/offer/first interview by job, location, etc.

What is the average time to offer/rejection by job, location, etc?

From which locations/jobs do we have the greatest difficulty (based on average time to hire) or the greatest cost in hiring?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses no calculations.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 1-147

Recruitment Success (Hires) KPI Status PMV Report

The Recruitment Success (Hires) KPI Status PMV report provides you with a view of the HRI Recruitment Success (Starts) Status KPI data, including the number of vacancies, the actual number of successful vacancy starts, and the target number for successful vacancy starts. The report groups this information into Organizations, Locations, Grades, Jobs, or Positions, depending on the value you select in the View By parameter.

See: HRI Recruitment Success (Starts) Status KPI, page 1-174

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Job
- Grade
- Position

Related Topics

Key Concepts for Recruiting and Hiring PMV Reports, page 1-148

HRI Recruitment Success (Starts) Status KPI

Use the HRI Recruitment Success (Starts) Status KPI to set up targets and notify a particular responsibility when recruitment success falls below a predefined level.

For example, you can notify all users with a management responsibility when recruitment success falls below 70%.

Business Questions

Tell me when recruitment in my organization is unsuccessful, compared to my target for recruitment success.

KPI Parameters

The HRI Recruitment Success (Starts) Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Workforce Measurement Type
- Start Date
- End Date

Target Comparisons

The KPI compares your targets to vacancies that:

- Have a status of closed in the time period for the target.
- Are for the organization defined by the organization parameter.
- Are defined with the selected budget measurement type.

Related Topics

Recruitment Success (Hires) KPI Status PMV Report, page 1-173

Recruitment Success (Hires) with Job Category KPI Status PMV Report

The Recruitment Success (Hires) with Job Category KPI Status PMV report provides you with a view of the HRI Recruitment Success (Starts) Job Category Status KPI data including the number of vacancies within a job category, the actual number of successful vacancy starts for a job category, and the target number for successful vacancy starts within a job category.

The report groups this information into Organizations, Locations, Grades, Jobs, or Positions, depending on the value selected in the View By parameter.

See: HRI Recruitment Success (Starts) with Job Category Status KPI, page 1-175

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Job Category
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Grade
- Position

Related Topics

Key Concepts for Recruiting and Hiring PMV Reports, page 1-148

HRI Recruitment Success (Starts) with Job Category Status KPI

The HRI Recruitment Success (Starts) with Job Category Status KPI enables you to set up targets and notify a particular responsibility when recruitment success falls below a predefined level for a specific job category.

For example, you can notify all users with a management responsibility when recruitment success in a job category falls below 70%.

Business Questions

Tell me when recruitment to a job category in my organization is unsuccessful, compared to my target for recruitment success.

KPI Parameters

The HRI Recruitment Success (Starts) Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category
- Workforce Measurement Type
- Start Date
- End Date

Target Comparisons

The KPI compares your targets to vacancies that:

- Have a status of closed in the time period for the target.
- Are for the organization defined by the organization parameter.
- Have the job category defined in the job parameter.
- Are defined with the selected budget measurement type.

Related Topics

Recruitment Success (Hires) with Job Category KPI Status PMV Report, page 1-175

Recruitment Success Report

This report provides a trend analysis showing the changes in recruitment success over a selected period of time. You can analyze the:

- Total number of openings recorded for vacancies.
- Total number of openings that have been filled.
- Performance Management Framework recruitment success targets.

This report also enables you to view the success of your recruitment activities. The report defines recruitment success as the percentage of vacancy openings that are filled.

The report uses the workforce created to fill the vacancies to calculate the openings filled total for each time period.

Business Questions

How successful is my recruitment and what is the trend?

Report Parameters

You must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Budget Measurement Type
- Job Category
- Job
- Business Plan
- Frequency
- Reporting Dates

Key Concepts

The Recruitment Success report calculates the total number of vacancy openings in a particular time period, and how many of these have been filled.

Number of Openings

For an opening to be included, it must be for a vacancy that has been closed in the selected time period. The vacancy must also match all the selection criteria.

For example, if you select an organization and a job, you must have entered an organization and job for the vacancy on the HRMS Requisition and Vacancy window.

Openings Filled

The report calculates the Openings Filled total by totaling the employee assignments created to fill the vacancies. Within HRMS Intelligence, you count employee assignments using Workforce; enabling you to define the employee value of each assignment. See: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Admnistration Guide*

The assignments created to fill the vacancy must match the criteria you select in the report parameters. The report does not include assignments in the Openings Filled total that do not match these criteria. For example, an assignment must have the same budget measurement value as the report parameters.

Recruitment Success

Recruitment success is calculated as:

```
(Total Budget Values for all Relevant Vacancies/Total Budget Valu
e for Employee Assignments) x 100
```

Learning Management Intelligence

Key Concepts for Learning Management Intelligence

To use the Learning Management reports and workbooks, you must install both Oracle HRMS and Oracle Learning Management. The reports and workbooks only include training events that are managed using Oracle Learning Management.

The following concepts enable you to accurately interpret the results of the reports in Learning Management:

- Calculation of Training Event Hours, page 1-178
- Successful Hours, page 1-178
- Calculation of Training Success, page 1-178
- Report Data, page 1-179
- Scope of Training Success Reports, page 1-179
- Training Success Targets for KPIs, page 1-179

Calculation of Training Event Hours

The Learning Management reports calculate the total number of hours employees have spent on training events. For the reports to include a training event in calculations, the training event must:

- Have ended in the time period defined by the time parameters.
- Have a status of Normal or Closed, if the event is scheduled.
- Not have a status of canceled.

The reports calculate the hours spent on each training event and multiply them by the number of relevant employees who attended the course.

Because students can be internal or external, the reports use the enrollment status of Attended, rather than assignment budget values, to count employees.

Successful Hours

The organizer of an event uses the Oracle Learning Management Enrollment Details window, or the Mass Update feature, to record whether a student successfully attended an event. If the student is successful, the reports calculate the hours of the event using a predefined formula, then calculate the total number of successful hours for all relevant employees.

See: Amending the Default Training Hours, *Configuring, Reporting, and System Administration Guide* and Adding Additional Training Time Periods, *Configuring, Reporting, and System Administration Guide*

Calculation of Training Success

Most reports and workbooks calculate training success as the percentage of total training hours delivered for your employees against the number of those hours that were successful.

The Analytics workbooks, however, calculate training success as the percentage successful students against the total number of attendees of an event.

Report data

The Learning Management reports display employees' job, grade, position and organization as of the date the employee was enrolled on the training course. The reports will not show any updates to these values after enrolment, unless there is another booking.

Scope of Training Success Reports

Training Success reports and workbooks only include employees who:

- Worked in the selected organization at the date they enrolled in the event.
- Have the enrollment status of attended for an event.
- Have an assignment on the date of enrollment that matches the parameters you select.

When you, or an HR administrator, book an employee on an event, you record their assignment. The reports and workbooks use this assignment, even if the employee subsequently changed their assignment.

Training Success reports and workbooks only include a training event if:

- An employee included in the report attended it.
- The event ended prior to the workbook End Date.
- The event status is Normal or Closed.
- The event has not been cancelled.

If a training event runs over two time periods it is only counted once, since the Training Success reports and workbooks use the event end date to count events.

Training Success Targets for KPIs

Use the following guidelines when setting up targets for the HRI Training Attendance KPIs: Percentage success:

- Enter the target as a percentage of the success you expect. For example, enter 90 if the training success target is 90%.
- Only set up Below Target values in the ranges for each notification responsibility. These KPIs indicate when training success falls below the targets level.
- Do **not** set up Above Target values.

Event Ranking Analysis Workbook

This workbook investigates the popularity of training events within a given period of time, by event days and student attendance.

Worksheets

This workbook has the following worksheets:

- By Event Days
- By Attendance

By Event Days Worksheet

This worksheet enables you to investigate the popularity of training events by ranking them by event days.

Business Questions

Which are the most popular events by event days?

Which events could be most profitable?

Parameters

You need to specify values for the following parameters:

- Event From
- Event To

Headings and Calculations

This worksheet contains the following column:

- **Free Seats**

  Values in this column are based on the Maximum Attendees minus Student Count. The calculation takes into account the number of canceled internal students as well as the number of canceled external students.

By Attendance Worksheet

This worksheet enables you to analyze the popularity of training events by ranking them by course attendance.

Business Questions

Which are the most popular events by attendance?

Which events are in high demand?

Parameters

You need to specify values for the following parameters:

- Event From
- Event To

Headings and Calculations

This worksheet contains the following column:

- **Free Seats**

  Values in this column are based on the Maximum Attendees minus Student Count. The calculation takes into account the number of canceled internal students as well as the number of canceled external students.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Student Training Success (External Students) Analysis Workbook

This workbook investigates the training success ratio for external students (students not employed by the organization running the training). If the SUCCESSFUL_ATTENDANCE_FLAG column of the OTA_DELEGATE_BOOKING table in the Oracle Learning Management schema is set to Yes, that enrollment is considered as a successful enrollment.

Worksheets

This workbook has the following worksheets:

- By Company
- By Company and Year

Key Concepts

These worksheets use events to calculate success. For an event to be included it must:

- Have an end date which is prior to the present date.
- Have a status of Normal or Closed, if the event is scheduled.
- Not be a canceled event.

The hours of an event are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of events, you may need to customize this formula. See: Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in Oracle Learning Management and HRMS, the Student Training Success (External Students) Analysis workbook calculates the following:

- **Hours Offered**

  The total number of training hours for all relevant events multiplied by the number of places available on all relevant events.

- **Hours Delivered**

  The total number of training hours of all the relevant events multiplied by the number of places filled by students on these events.

- **Hours Received**

  The total number of training hours employees have attended for all relevant training events.

- **Successful Hours**

  Using the Enrollment Details window, or the Mass Update feature, the organizer of the event can record whether a student has successfully attended an event. If the student is recorded as successfully having attended the event, then the employee's hours for this event are recorded as successful hours.

In the workbook, the successful hours are the total number of successful hours for all relevant events.

- **Utilization %**

  The total hours delivered as a percentage of the hours offered. For example, if 5 hours were delivered, and 10 hours were offered, then the utilization percentage would be 50%.

- **Success Rate %**

  Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Company Worksheet

This worksheet enables you to analyze the success of training hours delivered to external students for a company. You can investigate this for a Business Group and year.

Business Questions

What is the student success ratio for a particular company (or customer)?

Which company has the highest training success ratio?

Parameters

This worksheet has no parameters.

By Company and Year Worksheet

This worksheet enables you to analyze the success of training hours delivered to external students for a company, for different years. You can investigate this for a Business group and each company.

Business Questions

In which training year did a particular customer have the highest student success ratio?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Student Training Success (Internal Students) Analysis Workbook

This workbook investigates the training success ratio for internal students (students employed by the organization running the training).

Success ratio is calculated as the number of successful training hours delivered to internal students divided by the total number of training hours delivered to internal students. The number of successful training hours per event is the number of successful internal students enrolled for an event, multiplied by the course duration in days for that event.

The total number of training hours delivered to internal students for an event is the total number of internal students enrolled for an event, multiplied by the course duration in days for that event.

If the SUCCESSFUL_ATTENDANCE_FLAG column of the OTA_DELEGATE_BOOKING table in the Oracle Learning Management schema is set to Yes, that enrollment is considered as a successful enrollment.

Worksheets

This workbook has the following worksheets:

- By Organization and Year
- By Location and Year
- By Job Category and Year
- By Job and Year
- Attendance Summary

Key Concepts

These worksheets use events to calculate success. For an event to be included it must:

- Have an end date which is prior to the present date.
- Have a status of Normal or Closed, if the event is scheduled.
- Not be a canceled event.

The hours of an event are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of events, you may need to customize this formula. See: Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in Oracle Learning Management and HRMS, the Student Training Success (Internal Students) Analysis workbook calculates the following:

- **Hours Offered**

  The total number of training hours for all relevant events multiplied by the number of places available on all relevant events.

- **Hours Delivered**

  The total number of training hours of all the relevant events multiplied by the number of places filled by students on these events.

- **Hours Received**

  The total number of training hours employees have attended for all relevant training events.

- **Successful Hours**

  Using the Enrollment Details window, or the Mass Update feature, the organizer of the event can record whether a student has successfully attended an event. If the student is recorded as successfully having attended the event, then the employee's hours for this event are recorded as successful hours.

In the workbook, the successful hours are the total number of successful hours for all relevant events.

- **Utilization %**

  The total hours delivered as a percentage of the hours offered. For example, if 5 hours were delivered, and 10 hours were offered, then the utilization percentage would be 50%.

- **Success Rate %**

  Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Organization and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students each year, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Business Questions

What is the training success rate of an organization over a given period of time?

In which year did an organization have highest training success rate?

Parameters

This worksheet has no parameters.

By Location and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students for a location each year, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Business Questions

What is the training success rate for a training location over a given period of time?

In which training year did a particular training location have the highest training success rate?

Parameters

This worksheet has no parameters.

By Job Category and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students each year for a job by category, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Business Questions

What is the training success rate for a job category over a given period of time?

In which training year was the success rate highest for a particular job category?

Parameters

This worksheet has no parameters.

By Job and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students for a job by year, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Business Questions

What is the training success rate for a job over a given period of time?

In which year did a job have the highest training success rate?

Parameters

This worksheet has no parameters.

Attendance Summary Worksheet

This worksheet enables you to analyze the number of internal students attending training events. You can view internal student attendance by activity type, analyze success rates and information about failures.

Business Questions

How successful are my courses?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Training Cost and Revenue Analysis Workbook

This workbook investigates the costs involved in running training activities (courses), and indicates the revenue generated by these events. It analyzes costs and revenue information by training activity, sponsoring organization, training center, training category and competence.

Worksheets

This workbook has the following worksheets:

- By Training Activity, page 1-188
- Training Activity by Year, page 1-188
- By Sponsoring Organization, page 1-189
- Sponsoring Organization by Year, page 1-189
- By Training Center, page 1-189

Headings and Calculations

This workbook uses the following headings and calculations:

Currency of Results

Within Oracle Learning Management you can enter your costs in any currency you have set up, so that the worksheets all report in the same currency. HRMSi converts the results into the base currency of the Business Group.

For more information, see Entering A Conversion Rate Type, *Configuring, Reporting, and System Administration Guide*

Budget Cost

Budget costs are calculated using the costs of scheduled events, and events included in a program. The budget costs for scheduled events are taken from the budget cost entered in the Scheduled Event window.

An event can also be included in a program. The cost of these events is also included in the budget cost total. A single budget cost is entered for all events in a program using the Programs window. You can calculate the budget cost of an individual event within a program as follows:

- The duration of each event, in hours, is calculated.

  The duration of an event can be recorded in many different time units, such as days, weeks, or months. To convert the duration time into hours, the workbook uses the predefined Oracle FastFormula TEMPLATE_BIS_TRAINING_ CONVERT_DURATION.

  For more information, see Amending the Default Training Hours, *Configuring, Reporting, and System Administration Guide*, and Adding Additional Training Time Periods, *Configuring, Reporting, and System Administration Guide*
- The durations of all events in the program, in hours, are added together.
- The total duration of all events in the program, in hours, is divided by the duration in hours of the individual event. This prorates the number of hours for an individual event.
- The budget cost of the program event is multiplied by the pro-rata number of hours for an individual event.

The workbook repeats these steps for each event that is part of a program.

To calculate the final budget cost of an event, the workbook adds the scheduled budget cost of the event to the program budget cost of the event to obtain the total budget cost of an event.

Actual Cost

Actual costs are taken as the actual cost of the scheduled event, entered in the Scheduled Event window, and the cost of resources booked for the event.

Enter the cost of a resource for an event in the Book Resources window. For the cost of a resource to be included, it must be confirmed and associated with the event. Enter the cost for one resource per day. The cost is then multiplied by the quantity of resource required, and number of days.

The actual cost of an event is the actual cost, plus the cost of all resources for the event.

Actual Revenue

Actual revenue is the sum of internal and external revenue for each scheduled event. Internal revenue is calculated using the internal enrollments for a scheduled event.

Internal enrollments are entered in the Enrollment Details window using the organization type. For the enrollment to be included, it must have a status of Attended.

> **Note:** The workbook does not use the Internal checkbox on the Enrollment Details window.

The number of places for all internal enrollments are then added together. This is then multiplied by the price basis amount for the event (this is entered on the Scheduled Events window).

External revenue is calculated using all the external enrollments for a scheduled event. Enter the external enrollments in the Enrollment Details window using the Customer type. For the enrollment to be included, it must have a status of Attended.

External enrollments are linked to a finance line, which includes the cost of the enrollment. For a finance line to be included, it must be of the type Enrollment and must not be cancelled.

The total external revenue is the sum of the finance line amounts, summed over all the external bookings.

Since events can also be part of a program, the internal and external revenue costs for each event on a program must also be calculated. To do this the workbook:

- Calculates the duration of each event in hours.

  The duration of an event can be recorded in many different time units, such as days, weeks, or months. To convert the duration time into hours, the workbook uses the predefined Oracle FastFormula TEMPLATE_BIS_TRAINING_ CONVERT_DURATION.

  For more information, see Amending the Default Training Hours, *Configuring, Reporting, and System Administration Guide*, and Adding Additional Training Time Periods, *Configuring, Reporting, and System Administration Guide*

- The durations of all events in the program, in hours, are added together.

  The total duration of all events in the program, in hours, is divided by the duration in hours of the individual event. This prorates the number of hours for an individual event.

- The budget cost of the program event is multiplied by the pro-rata number of hours for an individual event.

- The internal revenue cost of the program event is calculated and multiplied by the pro-rata number of hours for an individual event.
- The external revenue cost of the program event is calculated and multiplied by the pro-rata number of hours for an individual event.

The workbook repeats these steps for each event that is part of a program.

To calculate the total Actual Revenue, the report adds together the external and internal revenue of all events, and then adds to this the external and internal revenue of all events included in a program.

Students Enrolled

The total number of external students enrolled, added to the total number of internal students enrolled.

Cost per Student

The actual cost divided by the students enrolled.

Revenue per Student

The actual revenue divided by the students enrolled.

Hours Offered

The total number of training hours for all relevant events multiplied by the number of places available on these events.

Hours Delivered

The total number of training hours for all relevant events, multiplied by the number of places filled by students on these events.

Cost per Hour

The actual costs divided by the hours delivered.

By Training Activity Worksheet

This worksheet enables you to analyze the cost and revenue generated by training events. You can investigate training activities for a specific Business Group, sponsoring organization and year.

Business Questions

What are the costs involved in running training events by activity?

How much revenue is generated by these training events, every year?

Parameters

This worksheet does not use parameters.

Training Activity by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities for different years, by Business group and sponsoring organization.

Business Questions

What are the costs involved in running a training activity?

How much revenue is generated by this activity each year?

Parameters

This worksheet does not use parameters.

By Sponsoring Organization Worksheet

This worksheet enables you to analyze the cost and revenue of training events for different organizations, by Business group and year.

Business Questions

For each sponsoring organization, what are the actual and budgeted training costs?

How much revenue is generated during a year?

Parameters

This worksheet does not use parameters.

Sponsoring Organization by Year Worksheet

This worksheet enables you to analyze the costs and revenue associated with training for different years. You can investigate costs and revenue for a Business Group and sponsoring organization.

Business Questions

What are the training costs and revenues generated for a sponsoring organization by training year?

Parameters

This worksheet does not use parameters.

By Training Center Worksheet

This worksheet enables you to analyze the costs and revenue of a training event for a training center, by Business Group, sponsoring organization and year.

Business Questions

What are the actual and budgeted training costs for each training center?

How much revenue is generated by each training center by year?

Parameters

You need to specify values for the following parameters:

- Event Training Center Hierarchy
- Top Event Training Center

Training Center by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities for different years. You can investigate by Business group, sponsoring organization, and training center.

Business Questions

For each training center, what are the actual and budgeted training costs?

How much revenue is generated for a sponsoring organization by training year?

Parameters

You need to specify values for the following parameters:

- Event Training Center Hierarchy
- Top Event Training Center

By Training Category Worksheet

This worksheet enables you to analyze the cost and revenue of training events for a training category. You can investigate costs and revenue for a Business group, sponsoring organization, and year.

Business Questions

What are the costs involved in running training events by category?

How much revenue is generated by each category?

Parameters

This worksheet does not use parameters.

Training Category by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training events in different years. You can investigate costs and revenue for a Business Group, sponsoring organization, and training category.

Business Questions

What are the costs involved in running training events for a training category by year?

How much revenue is generated by training events for a training category by year?

Parameters

This worksheet does not use parameters.

By Competence Worksheet

This worksheet enables you to analyze the cost and revenue of training activities by the competence achieved if a student successfully completes the activity.

Business Questions

What are the costs involved in running training events by year for a training competence?

How much revenue is generated by training events by year for a training competence?

Parameters

This worksheet does not use parameters.

By Competence and Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities by competence and year.

Business Questions

What are the costs involved in running training events for a training competence by year?

Tell me how much revenue is generated by running training events for a training competence by year.

Parameters

This worksheet does not use parameters.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Training Course Ranking by Amount Status Workbook

This workbook investigates the total amount of money generated by enrollments on each training event, and allows training events to be ranked by the enrollment amount generated.

Enrollments for a course may occur using a variety of currencies. To simplify this, the Course Ranking by Amount Workbook can convert foreign currencies to a common currency for reporting purposes. Currencies are converted using exchange rates maintained in a general ledger application.

Enrollments are possible through the Oracle Learning Management system as well as the Order Management (OM) system. This workbook reports on enrollments from both systems to produce a total enrollment amount for each event.

Worksheets

This workbook has the following worksheet:

- Course Ranking by Amount

Business Questions

Which is the most profitable training event?

Which is the least profitable training event?

What is the total enrollment amount generated within a given period of time?

Parameters

You need to specify values for the following parameters:

- Activity type
- Event start date
- Event end date
- Reporting currency
- Exchange rate
- Training event status
- Order header status
- Order line status
- Event training center hierarchy
- Top event training center

Worksheet Calcuations

The worksheet uses the following calculations:

- **Event days**

  Calculates the page item Event Duration Days. It is based on the Event Duration in days multiplied by the total number of enrollments.

- **Event days – internal**

  Calculates the page item, Event Days – Internal. It is based on a sum of Total Internal Enrollments multiplied by the Events Duration.

- **Event days – external**

  Calculates the page item, Event Days – External. It is based on a sum of Total External Enrollments multiplied by the Events Duration.

- **Event duration days**

  Calculates the page item, Event Duration. It is basde on the number of days between the Course Start Date and Course End Date.

- **Reporting currency**

  Populates the Reporting Currency column with the currency code for the currency that is being used.

- **Total amount per event**

  Populates the page item Total Amount per Event with the sum of Amount per Event.

- **Total attended amount**

  Calculates the page item Total Non Attended Amount. It is based on a sum of Total Amount where the booking status is equal to Attended.

- **Total enrollments**

  Calculates the total number of enrollments for each iLearning training event. It is based on a sum of Places Booked per Event.

- **Total external enrollments**

  Populates the variable Total External Enrollments, based on a sum of Places Booked for external bookings only.

- **Total internal booking amount**

  Populates the page item Total Internal Booking Amount, based on a sum of Internal Booking Amount per Event.

- **Total internal enrollments**

  Populates the variable Total Internal Enrollments, based on a sum of Places Booked for internal bookings only.

- **Total non-attended amount**

  Calculates the page item Total Non Attended Amount. It is based on a sum of Total Amount where booking status is not equal to Attended.

- **Total OM amount per event**

  Calculates the page item, Total OM Amount per Event. It is based on a sum of OM Amount per Event.

- **Total OTA amount per event**

  Populates the variable Total External Enrollments, based on a sum of Places Booked for external bookings only.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Training Success Workbook

This workbook investigates the time utilization and success rate of training events.

To calculate the time utilization of the training events, the report divides the total number of students confirmed on the course by the maximum number of students allowed to enroll on the event.

To calculate the success rate of the training event the report divides the total number of successful students by the total number of students confirmed on the course.

Worksheets

This workbook has the following worksheets:

- By Sponsoring Organization, page 1-195
- By Sponsor Organization and Year, page 1-195
- By Training Activity, page 1-196
- By Training Activity and Year, page 1-196
- By Training Center, page 1-196
- By Training Center and Year, page 1-196
- By Training Category, page 1-197

- By Training Category and Year, page 1-197
- By Competence, page 1-197
- By Competence and Year, page 1-198

Headings and Calculations

The workbook uses the following calculations:

- **Success Rate**

  Success rate is calculated as a number of successful training hours delivered to external students divided by the total number of training hours delivered to external students, where:

  - The number of successful training hours per event is the number of successful external students enrolled, multiplied by the course duration for the event.
  - The total number of training hours delivered to external students for an event is the total number of external students enrolled on the event, multiplied by the course duration in days for the event.

- **Successful Hours**

  This calculation is based on the number of Training Hours multiplied by the number of successful students.

- **Utilization**

  This calculation is based on the Training Hours Delivered divided by the Training Hours Offered.

- **Hours Delivered**

  This calculation is based on the number of training hours required by the activity multiplied by the number enrolled students.

- **Hours Offered**

  This calculation is based on the number of training hours required by the activity multiplied by the maximum number of attendees.

Key Concepts

These worksheets use events to calculate success. For an event to be included it must:

- Have an end date which is prior to the present date.
- Have a status of Normal or Closed, if the event is scheduled.
- Not be a canceled event.

The hours of an event are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of events, you may need to customize this formula. See: Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in Oracle Learning Management and HRMS, the Training Success workbook calculates the following:

- **Hours Offered**

The total number of training hours for all relevant events multiplied by the number of places available on all relevant events.

- **Hours Delivered**

  The total number of training hours of all the relevant events multiplied by the number of places filled by students on these events.

- **Hours Received**

  The total number of training hours employees have attended for all relevant training events.

- **Successful Hours**

  Using the Enrollment Details window, or the Mass Update feature, the organizer of the event can record whether a student has successfully attended an event. If the student is recorded as successfully having attended the event, then the employee's hours for this event are recorded as successful hours.

  In the workbook, the successful hours are the total number of successful hours for all relevant events.

- **Utilization %**

  The total hours delivered as a percentage of the hours offered. For example, if 5 hours were delivered, and 10 hours were offered, then the utilization percentage would be 50%.

- **Success Rate %**

  Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Sponsoring Organization Worksheet

This worksheet enables you to investigate the training success rate of training events for different sponsoring organizations.

Business Questions

What is the training utilization rate by sponsoring organization for a year?

What is the training success rate by sponsoring organization for a year?

Parameters

This worksheet has no parameters.

By Sponsoring Organization and Year Worksheet

This worksheet enables you to investigate the training success rate of training events for a sponsoring organization for each year.

Business Questions

What is the training utilization rate for a sponsoring organization by year?

What is the training success rate by sponsoring organization by year?

Parameters

This worksheet has no parameters.

By Training Activity Worksheet

This worksheet enables you to investigate the success rate of different training activities. You can investigate training activities by year and sponsoring organization.

Business Questions

What is the training utilization rate by training activity for a year?

What is the training success rate by training activity for a year?

Parameters

This worksheet has no parameters.

By Training Activity and Year Worksheet

This worksheet enables you to investigate the success rate of training activities each year. You can investigate training activities by Business Group and activity.

Business Questions

What is the training utilization rate for a training activity by year?

What is the training success rate for a training activity by year?

Parameters

This worksheet has no parameters.

By Training Center Worksheet

This worksheet enables you to investigate the training success rate of different training centers, by Business Group and year.

Business Questions

What is the training utilization rate by training center for an event year?

What is the training success rate by training center for an event year?

Parameters

You need to specify values for the following parameters:

- Event training center hierarchy
- Top event training center

By Training Center and Year Worksheet

This worksheet enables you to investigate the training success rate of a training center over a number of years. You can analyze success by Business Group and training center.

Business Questions

What is the training utilization rate for a training center by training year

What is the training success rate for a training center by training year?

Parameters

You need to specify values for the following parameters:

- Event training center hierarchy
- Top event training center

By Training Category Worksheet

This worksheet enables you to investigate the training success rate of events by training category. You can investigate different training categories for a Business Group and year.

Business Questions

What is the training utilization rate by training category for a training year?

What is the training success rate by training category for a training year?

Parameters

You need to specify values for the following parameters:

- Event training center hierarchy
- Top event training center

By Training Category and Year Worksheet

This worksheet enables you to investigate the training success rate of a training event in different years. You can analyze training success for a Business Group and training category.

Business Questions

What is the training utilization rate for a training category by year?

What is the training success rate for a training category by year?

Parameters

You need to specify values for the following parameters:

- Event training center hierarchy
- Top event training center

By Competence Worksheet

This worksheet enables you to investigate the success rate of a training activity by competencies. You can investigate competencies for a sponsoring organization and year.

Business Questions

What is the training utilization rate by training competency for an event year?

What is the training success rate by training competency for an event year?

Parameters

You need to specify values for the following parameters:

- Event training center hierarchy
- Top event training center

By Competence and Year Worksheet

This worksheet enables you to investigate the training success rate of training activities for a competence over a number of years. You can investigate a competence for each sponsoring organization.

Business Questions

What is the training utilization rate for a training competence by event year?

What is the training success rate for a training competence by event year?

Parameters

You need to specify values for the following parameters:

- Event training center hierarchy
- Top event training center

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Employee Training Attendance Success (Organization Hierarchy) Status Analytics Workbook

The Training Success (Organization Hierarchy) Status Analytics workbook investigates how successfully employees in different organizations and geographical areas are attending training courses.

Business Questions

How successful is employee training across different organizations or geographical areas?

Which organization is the most successful at training?

Which geographical area is the least successful at training?

Parameters

Before running the worksheets you must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy

- Top Organization
- Rollup Organizations – Yes/No
- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Organization
- By Geography Area

The worksheets display one row for each grouping. For example, the by Organization worksheet displays one row per organization.

Headings and Calculations

All worksheets contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Organization worksheet, this column is named "Organization".

- **Attendees**

  The number of attendees on training courses for each group.

- **Successful Attendees**

  The number of successful attendees on training courses for each group.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Employee Training Attendance Success (Organization Hierarchy) Trend Analytics Workbook

The Training Success (Organization Hierarchy) Trend Analytics workbook investigates how successfully employees are attending training courses over time.

Business Questions

Is the training in my enterprise become more or less successful over time?

Parameters

Before running the worksheets you must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Year
- By Semi Year
- By Quarter
- By Bi Month
- By Month

The worksheets display one row for each time period. For example, the by Month worksheet displays one row per month.

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **A time period column**

The heading depends on the selected worksheet, for example, in the by Year worksheet, this column is named “Year”.

- **Attendees**

  The number of attendees on training courses for each time period.

- **Successful Attendees**

  The number of successful attendees on training courses for each time period.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Employee Training Attendance Success (Organization Hierarchy) Template Analytics Workbook

The Employee Training Attendance Success (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating training success over yearly periods, the other providing a detailed analysis of training success in the workforce. These worksheets help you to create reports to analyze the success of your training activities. Training success is defined as the percentage of training courses that are successfully completed.

Parameters

Before running the worksheets you must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Year
- By Detail

By Year Worksheet

The by Year worksheet enables you to see training success for each year.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **Year**

  The time period for which this worksheet is run.

- **Attendees**

  The number of attendees on training courses for each group.

- **Successful Attendees**

  The number of successful attendees on training courses for each group.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

Detail Worksheet

The Detail worksheet calculates the training success rates for training events with the same start and end dates, for attendees in each organization, location, job, grade, and position.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Training Event Start Date**

  The date the training event started.

- **Training Event End Date**

  The date the training event ended.

- **Attendees**

  The number of attendees on training events with the same start and end dates, who are in the same organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Successful Attendees**

  The number of attendees successfully completing the training event, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

- **Organization**

  The organization of the attendees.

- **Location**

  The location of the attendees.

- **Job**

  The job held by the attendees.

- **Grade**

  The grade held by the attendees.

- **Position**

  The position of the attendees.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Training Attendance KPI Status PMV Report

The Training Attendance KPI Status PMV report provides you with a view of the HRI Training Attendance Status KPI data including the total number of attendees, the total number of successful attendees, the target values for training attendance success, and the actual values for training attendance success.

See: HRI Training Attendance Status KPI, page 1-204

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Job
- Grade

- Position

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

HRI Training Attendance Status KPI

Use the HRI Training Attendance Status KPI to notify different responsibilities when your training success falls below your target level. For example, you can notify all users with a senior management responsibility when the success of your training falls below 50%.

Business Questions

Tell me when training in my organization is unsuccessful, compared to my target for training success.

Target Comparisons

The HRI Training Attendance Status KPI compares your KPI targets with the training hours of employees who:

- Are employed in the selected organization, and defined by the organization dimension at the date they were enrolled on the event.
- Have the enrollment status of Attended for an event.

KPI Parameters

The HRI Training Attendance Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Start date
- End date

To understand how this KPI calculates training attendance success, see: Training Success Targets for KPIs, page 1-179

Related Topics

Training Attendance KPI Status PMV Report, page 1-203Workforce Intelligence for Learning Management Key Concepts, page 1-178

Training Attendance with Job Category KPI Status PMV Report

The Training Attendance with Job Category KPI PMV report provides you with a view of the HRI Training Attendance with Job Category Status KPI data including the total number of attendees in the selected job category, the total number of successful attendees, the target values for training attendance success, and the actual values for training attendance success.

See: HRI Training Attendance with Job Category Status KPI, page 1-205

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Job Category
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Grade
- Position
- Training Activity

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

HRI Training Attendance with Job Category Status KPI

Use the HRI Training Attendance with Job Category Status KPI to notify different responsibilities when your training success for a job category falls below your target level. For example, you can notify all users with a senior management responsibility when the success of your training for a job category falls below 50%.

Business Questions

Tell me when training for a job category in my organization is unsuccessful, compared to my target for training success.

Target Comparisons

The HRI Training Attendance with Job Category Status KPI compares your KPI targets with the training hours of employees who:

- Are employed in the selected organization, and defined by the organization dimension at the date they were enrolled on the event.
- Have the enrollment status of Attended for an event.
- Are employed in the selected job category, and defined by the job category dimension, at the date they were enrolled on the event.

KPI Parameters

The HRI Training Attendance with Job Category Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization

- Job Category
- Start date
- End date

To understand how this KPI calculates training attendance success, see: Training Success Targets for KPIs, page 1-179

Related Topics

Training Attendance with Job Category KPI Status PMV Report, page 1-204Workforce Intelligence for Learning Management Key Concepts, page 1-178

Training Classes by Competence Report

Run this report from the Individual Competencies report.

This report enables you to investigate training classes that provide a selected competence. The report displays:

- Course time
- Competence level delivered
- Dates the course is run
- Class title
- Class status
- Places
- Venue
- Cost

> **Note:** You can only run this report from the Individual Competencies report.

See: Individual Competencies Report, page 1-65

Business Questions

Which training courses are aimed at improving a particular competency?

Parameters

You need to specify values for the following parameters:

- Competence

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Training Success Report

This report enables you to investigate how successfully employees are attending training courses for a particular organization, location, job, and job category. You can also display your Performance Management Framework (PMF) targets by selecting a business plan.

For a selected time period you can analyze:

- The number of hours you have spent training your employees.
- How many of these hours were recorded as successful by the training organization.

To be able to use this report you must have installed both Oracle HRMS and Oracle Training Administration (OTA). The report only includes training events that are managed using OTA.

The Training Success report uses a predefined FastFormula to calculate the number of hours in an event. You will need to customize the predefined formula if:

- The number of hours per time period do not match those of your enterprise.
- You have set up additional time periods to record the duration of events.

> **Note:** If you set up additional time periods using the predefined formula, these will not be converted to hours. If you want to include these time periods in the report, you must copy and amend the predefined formula.

See: Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

Business Questions

How successful are my courses?

Parameters

You need to specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Business Plan
- Location
- Job Category
- Job
- Frequency
- Reporting Dates

Key Concepts

In order to get the most out of this report, you need to understand the following concepts:

Training Success

This report compares the number of hours employees have spent on training events, and how many of these hours have been recorded as successful.

The report only includes information about training events that have been recorded using OTA. Any external training courses or internal training events not recorded using OTA are not included in the report

Relevant Employees

The report only includes the training hours of employees who:

- Are employed in the selected organization at the date they were enrolled on the event.
- Have the enrollment status of attended for an event.
- Have an assignment that matches the report parameters you select.

When an employee is booked on an event, their assignment is recorded. The report uses this assignment, regardless of whether or not the employee has subsequently changed their assignment.

Training Event Hours for Employees

The report calculates the total number of hours employees have spent on training events. For a training event to be included it must:

- Have been attended by an employee selected for the report.
- Have an end date that is prior to the present date.
- Have a status of Normal or Closed, if the event is scheduled.
- Not have been cancelled.

The hours spent on each training event are calculated, and then multiplied by the number of relevant employees who attended the course.

The Training Success report uses a predefined formula to calculate the number of hours in an event. Depending on how you record the duration of events, you may need to customize this formula. See: Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

Successful Hours

Using the OTA Enrollment Details window, or the Mass Update feature, the organizer of the event can record whether a student has successfully attended an event. If the student is recorded as successfully having attended the event, then the employee's hours for this event are recorded as successful hours.

Block Bookings

You are not required to enter student details when you make block bookings in OTA. Therefore, any hours for an event where students have been block-booked onto the event are not included in the report.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 1-178

Glossary

360-Degree Appraisal

Part of the SSHR Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

360-Degree Self Appraisal

Part of the SSHR Appraisal function and also known as a Group Appraisal. This is a 360-Degree appraisal initiated by an employee. The employee (initiator) can add managers and reviewers to the appraisal.

Absence

A period of time in which an employee performs no work for the assigned organization.

Absence Types

Categories of absence, such as medical leave or vacation leave, that you define for use in absence windows.

Accrual

The recognized amount of leave credited to an employee which is accumulated for a particular period.

Accrual Band

A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

Accrual Period

The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

Accrual Plan

See: *PTO Accrual Plan*, page Glossary-22

Accrual Term

The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

Activity Rate

The monetary amount or percentage associated with an activity, such as $12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

Actual Premium

The per-participant premium an insurance carrier charges the plan sponsor for a given benefit.

Administrative Enrollment

A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re-enrollment.

AdvancePay

A process that recalculates the amount to pay an employee in the current period, to make an authorized early payment of amounts that would normally be paid in future payroll periods.

Alert

An email notification that you can set up and define to send a recipient or group of recipients a reminder or warning to perform a certain task or simply a notification to inform the recipient of any important information.

API

Application Programmatic Interfaces, used to upload data to the Oracle Applications database. APIs handle error checking and ensure that invalid data is not uploaded to the database.

Applicant

A candidate for employment in a Business Group.

Applicant/Candidate Matching Criteria

Matching functionality in the iRecruitment system that systematically identifies which candidates and applicants possess the skills, knowledge and abilities to be considered for a specific vacancy. The following columns are used for matching:

- Skills
- FT/PT
- Contractor/Employee
- Work at Home
- Job Category
- Distance to Location
- Key Words
- Salary

Apply for a Job

An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

Appraisal

An appraisal is a process where an employee's work performance is rated and future objectives set.

See also: *Assessment*, page Glossary-3.

Appraisee

A person being appraised by an appraiser..

Appraiser

A person, usually a manager, who appraises an employee.

Appraising Manager

The person who initiates and performs an Employee-Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

Arrestment

Scottish court order made out for unpaid debts or maintenance payments.

See also: *Court Order* , page Glossary-8

Assessment

An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job.

See also: *Appraisal*, page Glossary-3.

Assignment

A worker's assignment identifies their role within a business group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is required (for employees only) for payment purposes.

Assignment Number

A number that uniquely identifies a worker's assignment. A worker with multiple assignments has multiple assignment numbers.

Assignment Rate

A monetary value paid to a contingent worker for a specified period of time. For example, an assignment rate could be an hourly overtime rate of $10.50.

Assignment Set

A grouping of employees and applicants that you define for running QuickPaint reports and processing payrolls.

See also: *QuickPaint Report*, page Glossary-23

Assignment Status

For workers, used to track their permanent or temporary departures from your enterprise and, for employees only, to control the remuneration they receive. For applicants, used to track the progress of their applications.

Authoria

A provider of health insurance and compensation information, that provides additional information about benefits choices.

BACS

Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

Balance Adjustment

A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

Balance Dimension

The period for which a balance sums its balance feeds, or the set of assignments/transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

Balance Feeds

These are the input values of matching units of measure of any elements defined to feed the balance.

Balances

Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers.

See also: *Predefined Components* , page Glossary-21

Bargaining Unit

A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

Base Currency

The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

Base Summary

A database table that holds the lowest level of summary. Summary tables are populated and maintained by user-written concurrent programs.

Behavioral Indicators

Characteristics that identify how a competence is exhibited in the work context.

See also: *Proficiency Level* , page Glossary-22

Beneficiary

A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

Benefit

Any part of an employee's remuneration package that is not pay. Vacation time, employer-paid medical insurance and stock options are all examples of benefits.

See also: *Elements*, page Glossary-11

Block

The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next.

See also: *Region*, page Glossary-24, *Field*, page Glossary-12

Budget Measurement Type (BMT)

A subset of Workforce Measurement Type. It consists of a number of different units used to measure the workforce. The most common units are headcount and full time equivalent.

Budget Value

In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

Business Group

The highest level organization in the Oracle HRMS system. A Business Group may correspond to the whole of your enterprise or to a major grouping such as a subsidiary or operating division. Each Business Group must correspond to a separate implementation of Oracle HRMS.

Business Number (BN)

In Canada, this is the employer's account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Cafeteria Benefits Plan

See: *Flexible Benefits Program*, page Glossary-12

Calendar Exceptions

If you are using the Statutory Absence Payments (UK) feature, you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

Calendars

In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. If you are using the Statutory Absence Payments (UK) feature, you define calendars to determine the start date and time for SSP qualifying patterns.

Canada/Quebec Pension Plan (CPP/QPP) Contributions

Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

Candidate

(iRecruitment) A candidate is a person who has either directly provided their personal and professional information to a company's job site or provided their resume and details to a manager or recruiter for entering in the iRecruitment system.

Candidate Offers

An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

Career Path

This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

Carry Over

The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost.

See also: *Residual*, page Glossary-25

Cash Analysis

A specification of the different currency denominations required for paying your employees in cash. Union contracts may require you to follow certain cash analysis rules.

Ceiling

The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

Certification

Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

Child/Family Support payments

In Canada, these are payments withheld from an employee's compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

Collective Agreement

A collective agreement is a form of contract between an employer or employer representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

Collective Agreement Grade

Combination of information that allows you to determine how an employee is ranked or graded in a collective agreement.

Communications

Benefits plan information that is presented in some form to participants. Examples include a pre-enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

Compensation

The pay you give to employees, including wages or salary, and bonuses.

See also: *Elements*, page Glossary-11

Compensation Object

For Standard and Advanced Benefits, compensation objects define, categorize, and help to manage the benefit plans that are offered to eligible participants. Compensation objects include programs, plan types, plans, options, and combinations of these entities.

Competence

Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competence can be a piece of knowledge, a skill, an attitude, or an attribute.

See also: *Unit Standard Competence*, page Glossary-29

Competence Evaluation

A method used to measure an employees ability to do a defined job.

Competence Profile

Where you record applicant and employee accomplishments, for example, proficiency in a competence.

Competence Requirements

Competencies required by an organization, job or position.

See also: *Competence*, page Glossary-7, *Core Competencies*, page Glossary-8

Competence Type

A group of related competencies.

Configurable Forms

Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of configuration.

Consideration

(iRecruitment) Consideration means that a decision is registered about a person in relation to a vacancy so that the person can be contacted.

Consolidation Set

A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post-run processing.

Contact

A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

Content

When you create a spreadsheet or word processing document using Web ADI, the content identifies the data in the document. Content is usually downloaded from the Oracle application database.

Contingent Worker

A worker who does not have a direct employment relationship with an enterprise and is typically a self-employed individual or an agency-supplied worker. The contingent worker is not paid via Oracle Payroll.

Contract

A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

Contribution

An employer's or employee's monetary or other contribution to a benefits plan.

Core Competencies

Also known as *Leadership Competencies* or *Management Competencies*. The competencies required by every person to enable the enterprise to meet its goals.

See also: *Competence*, page Glossary-7

Costable Type

A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

Costing

Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

Court Order

A ruling from a court that requires an employer to make deductions from an employee's salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority.

See also: *Arrestment*, page Glossary-3

Credit

A part of the Qualifications Framework. The value a national qualifications authority assigns to a unit standard competence or a qualification. For example, one credit may represent 10 hours of study, a unit standard competence may equate to 5 credits, and a qualification may equate to 30 credits.

Criteria Salary Rate

Variable rate of pay for a grade, or grade step. Used by Grade/Step Progression.

Database Item

An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

Date Earned

The date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed.

Date Paid

The effective date of a payroll run. Date paid dictates which tax rules apply and which tax period or tax year deductions are reported.

Date To and Date From

These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field.

See also: *DateTrack*, page Glossary-9, *Effective Date*, page Glossary-10

DateTrack

When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date.

See also: *Effective Date*, page Glossary-10

Default Postings

(iRecruitment) Default text stored against business groups, organizations, jobs, and/or positions. The default postings are used to create job postings for a vacancy.

Dependent

In a benefit plan, a person with a proven relationship to the primary participant whom the participant designates to receive coverage based on the terms of the plan.

Deployment Factors

See: *Work Choices*, page Glossary-30

Derived Factor

A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

Descriptive Flexfield

A field that your organization can configure to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also: *Key Flexfield* , page Glossary-15

Developer Descriptive Flexfield

A flexfield defined by your localization team to meet the specific legislative and reporting needs of your country.

See also: *Extra Information Types*, page Glossary-12

Direct Deposit

The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

Discoverer Workbook

A grouping of worksheets. Each worksheet is one report.

Discoverer Worksheet

A single report within a workbook. A report displays the values of predefined criteria for analysis.

Distribution

Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

Download

The process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

Effective Date

The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window.

See also: *DateTrack*, page Glossary-9

EIT

See: *Extra Information Type*, page Glossary-12

Electability

The process which determines whether a potential benefits participant, who has satisfied the eligibility rules governing a program, plan, or option in a plan, is able to elect benefits. Participants who are *eligible* for benefits do not always have *electable* benefit choices based on the rules established in a benefit plan design.

Element Classifications

These control the order in which elements are processed and the balances they feed. Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

Element Entry

The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.

See also: *Recurring Elements*, page Glossary-24, *Nonrecurring Elements*, page Glossary-18

Element Link

The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element.

See also: *Standard Link*, page Glossary-27

Elements

Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

Element Set

A group of elements that you define to process in a payroll run, or to control access to compensation information from a configured form, or for distributing costs.

Eligibility

The process by which a potential benefits participant satisfies the rules governing whether a person can ever enroll in a program, plan, or option in a plan. A participant who is *eligible* for benefits must also satisfy *electability* requirements.

Employee

A worker who has a direct employment relationship with the employer. Employees are typically paid compensation and benefits via the employer's payroll application.

Employee Histories

An SSHR function for an employee to view their Learning History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

Employment Category

A component of the employee assignment. Four categories are defined: Full Time - Regular, Full Time - Temporary, Part Time - Regular, and Part Time - Temporary.

Employment Equity Occupational Groups (EEOG)

In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

Employment Insurance (EI)

Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

Employment Insurance Rate

In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

Enrollment Action Type

Any action required to complete enrollment or de-enrollment in a benefit.

Entitlement

In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

ESS

Employee Self Service. A predefined SSHR responsibility.

Event

An activity such as a training day, review, or meeting, for employees or applicants. Known as *class* in OLM.

Ex-Applicant

Someone who has previously applied for a vacancy or multiple vacancies, but all applications have ended, either because the applicant has withdrawn interest or they have been rejected. Ex-Applicants can still be registered users.

Expected Week of Childbirth (EWC)

In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of childbirth is used in the calculations for Statutory Maternity Pay (SMP).

Extra Information Type (EIT)

A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country.

See also: *Developer Descriptive Flexfield*, page Glossary-10

Field

A view or entry area in a window where you enter, view, update, or delete information.

See also: *Block*, page Glossary-5, *Region*, page Glossary-24

Flex Credit

A unit of "purchasing power" in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to "purchase" benefits plans and/or levels of coverage within these plans.

Flexible Benefits Program

A benefits program that offers employees choices among benefits plans and/or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to "purchase" these benefits plans and/or coverage levels.

Flexible Spending Account

(FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care expenses. Annual monetary limits and use-it-or-lose it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

Form

A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components.

See also: *Block*, page Glossary-5, *Region*, page Glossary-24, *Field*, page Glossary-12

Full Time Equivalent (FTE)

A Workforce Measurement Type (WMT) that measures full time equivalent. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Global Value

A value you define for any formula to use. Global values can be dates, numbers or text.

Goods or Service Type

A list of goods or services a benefit plan sponsor has approved for reimbursement.

Grade

A component of an employee's assignment that defines their level and can be used to control the value of their salary and other compensation elements.

Grade Comparatio

A comparison of the amount of compensation an employee receives with the mid-point of the valid values defined for his or her grade.

Grade Ladder

The key component of Grade/Step Progression. You use a grade ladder to categorize grades, to determine the rules for how an employee progresses from one grade (or step) to the next, and to record the salary rates associated with each grade or step on the ladder.

Grade Rate

A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

Grade Scale

A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required.

See also: *Pay Scale*, page Glossary-19

Grade Step

An increment on a grade scale. Each grade step corresponds to one point on a pay scale.

See also: *Grade Scale*, page Glossary-13

Grandfathered

A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

Group

A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

Group Certificate

In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year..

Headcount(HEAD)

A Workforce Measurement Type (WMT) that measures headcount. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Hierarchy

An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

Imputed Income

Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non-cash awards.

Info Online

A generic framework to integrate Oracle applications with partner applications, enabling users to access information from third-party providers, Metalink and Learning Management.

Initiator

In SSHR a person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

Input Values

Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element's run result. You can define up to fifteen input values for an element.

Instructions

An SSHR user assistance component displayed on a web page to describe page functionality.

Integrator

Defines all the information that you need to download or upload from a particular window or database view using Web ADI.

Interface

A Web ADI term for the item that specifies the columns to be transferred from the Oracle applications database to your desktop or vice versa.

Involuntary

Used in turnover to describe employees who have ceased employment with the enterprise not of their own accord, for example, through redundancy.

Job

A job is a generic role within a business group, which is independent of any single organization. For example, the jobs "Manager" and "Consultant" can occur in many organizations.

Job Posting

An advertisement for a specific vacancy. This is the public side of the vacancy for which a candidate would apply.

Key Flexfield

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also: *Descriptive Flexfield*, page Glossary-10

Key Performance Indicator (KPI)

Target values that you set for the performance of your enterprise. This value comes from the corresponding KPI Portlet/Report. You can configure the Performance Management Framework to send a notification when actual performance falls short of, or exceeds, the target value. For example, you may configure the Performance Management Framework to send you a notification when workforce variance is greater than 10 percent, or when training success is below 50 percent.

Key Performance Indicator (KPI) Portlet/Report

Displays the executive summary of key measures such as total headcount and total salary.

Layout

Indicates the columns to be displayed in a spreadsheet or Word document created using Web ADI.

Learning Management

Oracle’s enterprise learning management system that administers online and offline educational content.

Leave Loading

In Australia, an additional percentage amount of the annual leave paid that is paid to the employee.

Leaver’s Statement

In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee’s entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

Legal Employer

A business in Australia that employs people and has registered with the Australian Tax Office as a Group Employer.

Life Event

A significant change in a person's life that results in a change in eligibility or ineligibility for a benefit.

Life Event Collision

A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

Life Event Enrollment

A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

Linked PIWs

In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee's entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

Linking Interval

In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.

LMSS

Line Manager Self Service. A predefined SSHR responsibility.

Long Service Leave

Leave with pay granted to employees of a particular employer after a prescribed period of service or employment with that employer.

Lookup Types

Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

Lower Earnings Limit (LEL)

In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

Manager

(iRecruitment) A manager accesses the iRecruitment system to document their hiring needs and conduct their recruiting activities online. Specifically, these activities include vacancy definition, searching for candidates, and processing applicants through the vacancy process.

Manager-Employee Appraisal

Part of the SSHR Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.

Mapping

If you are bringing in data from a text file to Oracle HRMS using a spreadsheet created in Web ADI, you need to map the columns in the text file to the application's tables and columns.

Maternity Pay Period

In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

Medicare Levy

An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

Menus

You set up your own navigation menus, to suit the needs of different users.

My Account

(iRecruitment) My Account is the total of either a candidate or applicant's personal and vacancy-specific information including the information needed to manage their progress through the recruitment process.

NACHA

National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

National Identifier

This is the alphanumeric code that is used to uniquely identify a person within their country. It is often used for taxation purposes. For example, in the US it is the Social Security Number, in Italy it is the Fiscal Code, and in New Zealand it is the IRD Number.

National Occupational Classification (NOC) code

In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

Net Accrual Calculation

The rule that defines which element entries add to or subtract from a plan's accrual amount to give net entitlement.

Net Entitlement

The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

Nonrecurring Elements

Elements that process for one payroll period only unless you make a new entry for an employee.

See also: *Recurring Elements*, page Glossary-24

North American Industrial Classification (NAIC) code

The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

Not in Program Plan

A benefit plan that you define outside of a program.

OLM

Oracle Learning Management.

Online Analytical Processing (OLAP)

Analysis of data that reveals business trends and statistics that are not immediately visible in operational data.

Online Transactional Processing (OLTP)

The storage of data from day-to-day business transactions into the database that contains operational data.

Open Enrollment

A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

Oracle FastFormula

Formulas are generic expressions of calculations or comparisons you want to repeat with different input values. With Oracle FastFormula you can write formulas using English words and basic mathematical functions. The output of FastFormulas is fed back into reports.

Organization

A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

OSSWA

Oracle Self Service Web Applications.

Outcome

For a unit standard competence, a behavior or performance standard associated with one or more assessment criteria. A worker achieves a unit standard competence when they achieve all outcomes for that competence.

Overrides

You can enter overrides for an element's pay or input values for a single payroll period. This is useful, for example, when you want to correct errors in data entry for a nonrecurring element before a payroll run.

Parameter Portlet

A portlet in which you select a number of parameters that may affect all your portlets on your page. These may include an effective date, the reporting period, the comparison type, the reporting manager, and the output currency for your reports. The parameter portlet is usually available at the top of the portal page.

Pattern

A pattern comprises a sequence of time units that are repeated at a specified frequency. The Statutory Absence Payments (UK) feature, uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

Pattern Time Units

A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

Pay Scale

A set of progression points that can be related to one or more rates of pay. Employee's are placed on a particular point on the scale according to their grade and, usually, work experience.

See also: *Grade Scale*, page Glossary-13

Pay Value

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-14

Payment Type

There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.

Payroll

A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

Payroll Reversal

A payroll reversal occurs when you reverse a payroll run for a single employee, in effect cancelling the run for this employee.

Payroll Rollback

You can schedule a payroll rollback when you want to reverse an entire payroll run, cancelling out all information processed in that run. To preserve data integrity, you can roll back only one payroll at a time, starting with the one most recently run.

Payroll Run

The process that performs all the payroll calculations. You can set payrolls to run at any interval you want.

People List

An SSHR line manager utility used to locate an employee.

Performance Management Framework (PMF)

A business intelligence tool used to alert users to exceptional circumstances, as defined by KPIs. When a particular factor measured by HRMSi goes beyond a threshold chosen by the user, the system sends the user a workflow notification.

Performance Management Viewer (PMV)

A reporting tool that displays the report that corresponds to one or more PMF targets.

Performance (within Assessment)

An expectation of "normal" performance of a competence over a given period. For example, a person may exceed performance expectation in the communication competence.

See also: *Proficiency (within Assessment)*, page Glossary-21, *Competence*, page Glossary-7, *Assessment*, page Glossary-3

Period of Incapacity for Work (PIW)

In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less then the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period of Placement

The period of time a contingent worker spends working for an organization. A contingent worker can have only one period of placement at a time although they can have multiple assignments during that time.

Period Type

A time division in a budgetary calendar, such as week, month, or quarter.

Personal Public Service Number (PPS)

The Irish equivalent to National Insurance number in the UK, or the Social Security number in the US.

Personal Tax Credits Return (TD1)

A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and

SIN. These credits determine the amount to withhold from the employee's wages for federal/provincial taxes.

Person Search

An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

Person Type

There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex-employees, applicants, and ex-applicants. The eighth category is 'External'. You can create your own user person types based on the eight system types.

Personnel Actions

Personnel actions is a public sector term describing business processes that define and document the status and conditions of employment. Examples include hiring, training, placement, discipline, promotion, transfer, compensation, or termination. Oracle HRMS uses the term *self-service actions* synonymously with this public sector term. Oracle Self Service Human Resources (SSHR) provides a configurable set of tools and web flows for initiating, updating, and approving self-service actions.

Plan Design

The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

Plan Sponsor

The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

Position

A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

Predefined Components

Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

Professional Information

An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.

Proficiency (within Assessment)

The perceived level of expertise of a person in a competence, in the opinion of the assessor, over a given period. For example, a person may demonstrate the communication competence at Expert level.

See also: *Performance (within Assessment)*, page Glossary-20, *Competence*, page Glossary-7, *Assessment*, page Glossary-3

Proficiency Level

A system for expressing and measuring how a competence is exhibited in the work context.

See also: *Behavioral Indicators*, page Glossary-4.

Progression Point

A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale.

See also: *Pay Scale*, page Glossary-19

Prospect Pool

(iRecruitment) The prospect pool contains all registered users who have given permission for their information to be published.

Provincial/Territorial Employment Standards Acts

In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public/general holidays, parental and adoption leave, etc., for employees regulated by provincial/territorial legislation.

Provincial Health Number

In Canada, this is the account number of the provincially administered health care plan that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

PTO Accrual Plan

A benefit in which employees enroll to entitle them to accrue and take paid time off (PTO). The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

QPP

(See Canada/Quebec Pension Plan)

QA Organization

Quality Assurance Organization. Providers of training that leads to Qualifications Framework qualifications register with a QA Organization. The QA Organization is responsible for monitoring training standards.

Qualification Type

An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test.

See also: *Competence*, page Glossary-7

Qualifications Framework

A national structure for the registration and definition of formal qualifications. It identifies the unit standard competencies that lead to a particular qualification, the awarding body, and the field of learning to which the qualification belongs, for example.

Qualifying Days

In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

Qualifying Pattern

See: *SSP Qualifying Pattern*, page Glossary-27

Qualifying Week

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number

In Canada, this is the employer's account number with the Ministere du Revenu du Quebec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire

An SSHR function which records the results of an appraisal.

QuickPaint Report

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, page Glossary-3

QuickPay

QuickPay allows you to run payroll processing for one employee in a few minutes' time. It is useful for calculating pay while someone waits, or for testing payroll formulas.

Ranking

(iRecruitment) A manually entered value to indicate the quality of the applicant against other applicants for a specific vacancy.

Rates

A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

Rating Scale

Used to describe an enterprise's competencies in a general way. You do not hold the proficiency level at the competence level.

See also: *Proficiency Level*, page Glossary-22

Record of Employment (ROE)

A Human Resources Development Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

Recruitment Activity

An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall activity.

Recurring Elements

Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links.

See also: *Nonrecurring Elements*, page Glossary-18, *Standard Link*, page Glossary-27

Region

A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window.

See also: *Block*, page Glossary-5, *Field*, page Glossary-12

Registered Pension Plan (RPP)

This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

Registered Retirement Savings Plan (RRSP)

This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

Registered User

(iRecruitment) A person who has registered with the iRecruitment site by entering an e-mail address and password. A registered user does not necessarily have to apply for jobs.

Report Parameters

Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Set

A group of reports and concurrent processes that you specify to run together.

Requisition

The statement of a requirement for a vacancy or group of vacancies.

Request Groups

A list of reports and processes that can be submitted by holders of a particular responsibility.

See also: *Responsibility*, page Glossary-25

Residual

The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit.

See also: *Carry Over*, page Glossary-6

Responsibility

A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities.

See also: *Security Profile*, page Glossary-26, *User Profile Options*, page Glossary-30, *Request Groups*, page Glossary-24, *Security Groups*, page Glossary-24

Resume

A document that describes the experience and qualifications of a candidate.

RetroPay

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

Retry

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

Revenue Canada

Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministere du Revenu du Quebec.

Reversal

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

Reviewer (SSHR)

A person invited by an appraising manager to add review comments to an appraisal.

RIA

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

Rollback

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

Rollup

An aggregate of data that includes subsidiary totals.

Run Item

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

Salary Basis

The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

Salary Rate

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

Scheduled Enrollment

A benefits plan enrollment that takes place during a predefined enrollment period, such as an open enrollment. Scheduled enrollments can be administrative, open, or unrestricted.

Search by Date

An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

Security Group

Security groups enable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-25, *Security Profile*, page Glossary-26, *User Profile Options*, page Glossary-30

Security Groups Enabled

Formerly known as Cross Business Group Responsibility security. This security model uses security groups and enables you to link one responsibility to many Business Groups.

Security Profile

Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities.

See also: *Responsibility*, page Glossary-25

Self Appraisal

Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

Site Visitor

(iRecruitment) A person who navigates to the iRecruitment web site and may view job postings. This person has not yet registered or logged in to the iRecruitment system. This individual may search for postings on the web site and also has the ability to log in or register with the iRecruitment site.

SMP

See: *Statutory Maternity Pay*, page Glossary-28

Social Insurance Number (SIN)

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

Source Deductions Return (TP 1015.3)

A Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

SSHR

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP

See: *Statutory Sick Pay*, page Glossary-28

SSP Qualifying Pattern

In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

Standard HRMS Security

The standard security model. Using this security model you must log on as a different user to see a different Business Group.

Standard Link

Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link.

See also: *Element Link*, page Glossary-11, *Recurring Elements*, page Glossary-24

Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1)

A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

Statement of Remuneration and Expenses (TD1X)

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

Statutory Maternity Pay

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Statutory Sick Pay

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

Succession Planning

An SSHR function which enables a manager to prepare a succession plan.

Suitability Matching

An SSHR function which enables a manager to compare and rank a persons competencies.

Superannuation Guarantee

An Australian system whereby employers are required to contribute a percentage of an eligible employee’s earnings to a superannuation fund to provide for their retirement.

Supplier

An internal or external organization providing contingent workers for an organization. Typically suppliers are employment or recruitment agencies.

Tabbed Regions

Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

Task Flows

A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task flows to meet the needs of groups of users.

Tax Point

The date from which tax becomes payable.

Template Letter

Form letter or skeleton letter that acts as the basis for creating mail merge letters. The template letter contains the standard text, and also contains field codes, which are replaced by data from the application during the mail merge process.

Terminating Employees

You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

Termination Rule

Specifies when entries of an element should close down for an employee who leaves your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

Tips

An SSHR user assistance component that provides information about a field.

Transcentive

A third-party compensation management solutions provider, that provides additional information about benefits choices.

Unit Standard

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

Unit Standard Competence

A competence that is defined in a Unit Standard and linked to a Qualifications Framework qualification.

Upload

The process of transferring the data from a spreadsheet on your desktop, created using Web ADI, back to the Oracle HRMS application.

User Assistance Components

SSHR online help comprising tips and instructions.

User Balances

Users can create, update and delete their own balances, including dimensions and balance feeds.

See also: *Balances*, page Glossary-4

User Profile Options

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-25, *Security Profile*, page Glossary-26

User-based Security

With this type of security, the application generates the security permissions for a current user when that user logs on to a system. The system uses the security profile (can be position, supervisor, or organization-based, for example) to generate security permissions for the current user, for example, based on the user's position. An alternative to user-based security is a security profile with defined security rules, for example, to specify that the top-level position for a position-based security profile is Position A, irrespective of the current user's position.

View

An example of an interface that you can use to download data from the Oracle HRMS application to a spreadsheet using Web ADI.

Viewer (SSHR)

A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

Viewer (Web ADI)

A desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS via Web ADI.

Voluntary

Term used in turnover to describe employees who have ceased employment with the enterprise of their own accord, for example, by resigning.

Waiting Days

In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.

WCB Account Number

In Canada, this is the account number of the provincially administered Worker's Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

Work Choices

Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person's capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

Worker

An employee or a contingent worker.

Worker's Compensation Board

In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the employer. Worker's Compensation Board premiums are paid entirely by the employer.

Workflow

An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

Workforce Measurement Type (WMT)

Groups of different units combined to measure the workforce. The most common units are headcount and full time equivalent.

Workforce Measurement Value (WMV)

A WMT value, for example, headcount or FTE.

Work Structures

The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

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