

Oracle® HR Intelligence

Daily Business Intelligence for HRMS User Guide

Release 11*i*

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HRMS Glossary

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Oracle HR Intelligence Daily Business Intelligence for HRMS User Guide, Release 11i

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Oracle welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

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Preface

Intended Audience

Welcome to Release 11i of the *Oracle HR Intelligence Daily Business Intelligence for HRMS 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.

- 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 viii for more Oracle Applications product information.

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Structure

1 Daily Business Intelligence for HRMS
HRMS Glossary

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 HR Intelligence Daily Business Intelligence for HRMS Implementation Guide

This guide provides detailed information on how to set up and maintain Daily Business Intelligence for HRMS.

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.

Oracle E-Business Intelligence Daily Business Intelligence User Guide

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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 Self-Service Human Resources 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 iRecruitment 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 *OracleMetaLink* 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 *OracleMetalink*.

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.

Daily Business Intelligence for HRMS

Daily Business Intelligence for HRMS

Daily Business Intelligence for HRMS Overview

Oracle Daily Business Intelligence (DBI) for HRMS provides information about your workforce and your human resource management processes. It is a comprehensive reporting solution that provides workforce analysis, workforce distribution, and workforce cost visibility. Built on the proven Oracle Human Resources suite of transactional applications, Daily Business Intelligence for HRMS provides executives and Human Resource line managers a daily view of the enterprise workforce through the HR Management dashboards and underlying reports.

Using the extensive reporting and analytical capabilities of DBI for HRMS, managers can obtain comprehensive, real-time views of the workforce, assess current employee performance and, if necessary, take action on human resource issues.

The following dashboards are available to provide you with compact, summarized information relating to your workforce:

- **HR Management – Overview**
- **HR Management – Turnover**
- **HR Management – Headcount**

From each dashboard you can drill to related reports for more in-depth analysis.

See *Oracle E-Business Intelligence Daily Business Intelligence User Guide* for a complete list of dashboards and content available in Daily Business Intelligence.

Common concepts

To get the most out of DBI for HRMS you need to understand the following concepts:

- DBI Responsibilities, page 1-2
- DBI for HRMS Data Security, page 1-3
- How DBI for HRMS Derives Report Values, page 1-3
- How DBI for HRMS Parameters Affect Reports, page 1-8
- Troubleshooting DBI for HRMS Reports, page 1-18

DBI Responsibilities

You can access the HR Management dashboards using the following responsibilities:

- HR Line Manager
- Daily HR Intelligence

These responsibilities provide access to the HR Management dashboards and all of the associated regions and underlying reports.

The reports are based on the Supervisor hierarchy.

DBI for HRMS Data Security

Daily Business Intelligence for HRMS uses the supervisor hierarchy, based on the association between assignment and supervisor in the Assignment window, to secure data.

As an employee you are associated with your Oracle Applications user ID. When you log in, the application authenticates your user ID. In the HR Management dashboards, you are treated as the top line manager in the Manager parameter.

Once logged in, you can view information about your subordinates in the supervisor hierarchy, but not information about your supervisor or peer managers.

For information on standard DBI security, see *Daily Business Intelligence Implementation Guide* on Metalink.

How DBI for HRMS Derives Report Values

You can interpret DBI for HRMS reports accurately if you understand how the reports calculate and derive values.

How DBI for HRMS Calculates Headcount

Headcount is one method that an enterprise can use to measure its workforce (other methods include FTE, Money, and Hours). DBI currently only supports headcount.

DBI for HRMS measures headcount at a point in time. The point in time may be:

- The start or end date of the reporting period
- For trend reports, the rolling Period dates within a reporting period
- An event date, such as termination date or hire date

An employee can have more than one assignment, each with a headcount of 1. DBI for HRMS reports on headcount, not number of employees.

If you need to know more about how HRMS reports gather workforce statistics, see *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

Note: If you delete an employee record, to remove a person or assignment that is incorrect, DBI for HRMS does not include that record in any headcount calculations, including gains or losses. If you change the effective date to the period before the deletion, the record will not appear.

Calculations that DBI for HRMS Performs on Headcount

The following headcount calculations appear in DBI for HRMS reports:

- **Total**

This is the total headcount.

- **Headcount Ratio**

Ratio columns tell you what percentage of the total row headcount meets each column criteria. If you view a report by manager, each row tells what percentage of that manager's headcount meets the column criteria. Each row totals 100%.

For example, if you view the Headcount Ratio with Performance Band Status report by Manager, each row tells you, for each manager, what percentage of the manager's headcount falls within each Performance band. The row values add up to 100%.

If you view the Terminations with Length of Service Status report by manager, each row displays the percentage of the manager's total terminated headcount that falls within each Length of Service band.

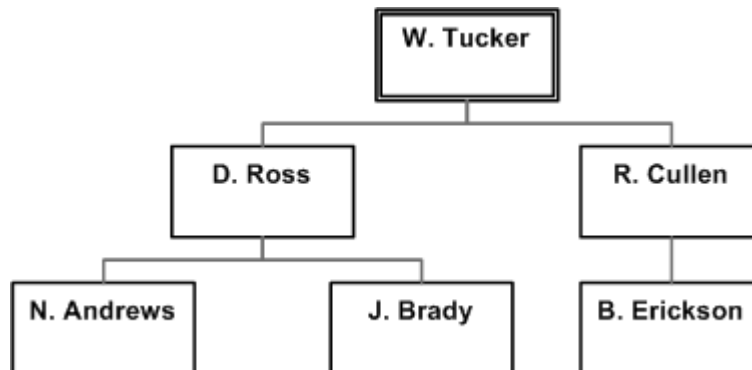
How DBI for HRMS Calculates Employee Transfers

A transfer occurs when an employee transfers from one manager in the enterprise to another. A transfer is therefore both a headcount gain (transfer in) and a headcount loss (transfer out) for a manager hierarchy, though not necessarily within the same hierarchy.

DBI counts transfers in and out of a manager hierarchy on the day the employee starts work for a new manager.

Transfers can occur at any level in a hierarchy. DBI for HRMS counts a transfer out against the employee's former manager, and against all managers higher in that hierarchy. It counts a transfer in against the employee's new manager, and against all managers higher in that hierarchy.

DBI for HRMS does not count transfers within a manager's hierarchy, since they are of no interest to that manager. For example:



A transfer of J. Brady from D. Ross to R. Cullen will show as -1 on D. Ross's line and +1 on R. Cullen's line. However, this transfer will not appear on W. Tucker's total line because there is no net gain or loss to W. Tucker. It is simply a transfer within W. Tucker's hierarchy.

When calculating the total transfers into a manager's hierarchy, DBI for HRMS only includes subordinates that were previously from a different manager's hierarchy.

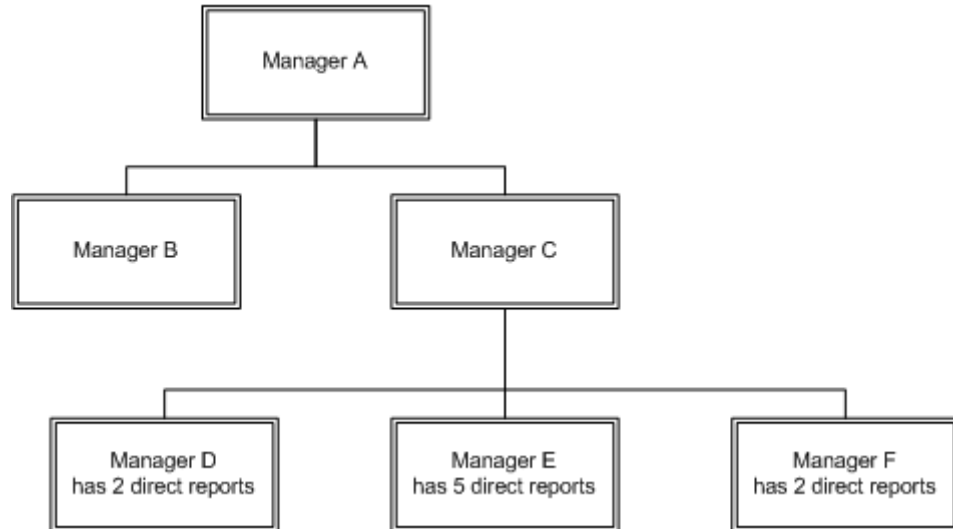
Similarly, when calculating the total transfers out of a manager's hierarchy, DBI for HRMS only includes subordinates that are going to report to a different manager's hierarchy.

If an employee transfers within the current manager's hierarchy, DBI for HRMS calculates the transfer as one transfer out of the hierarchy of the employee's previous direct supervisor, and as one transfer into the hierarchy of the employee's current direct supervisor.

If an employee transfers within the current supervisor hierarchy, together with his subordinates, DBI for HRMS calculates the total number of transfers out of the hierarchy

of the employee's previous immediate supervisor, and the total number of transfers into the hierarchy of the employee's current immediate supervisor.

For example, consider the following hierarchy, where A. King manages F. Lee and C. Arur, and C. Arur manages D. Rao, E. Benara, and B. Walker, and E. Benara manages 5 people.



If manager E. Benara, with 5 direct reports, transfers supervisor from manager C. Arur to manager F. Lee, DBI for HRMS calculates that 6 people have transferred into F. Lee's hierarchy, and 6 people have transferred out of C. Arur's hierarchy. No employees have transferred into or out of manager A. King's hierarchy, since the transfers took place *within* A. King's hierarchy.

DBI for HRMS counts only transfers that occur within the reporting period, and only if the transferring assignment has a headcount value greater than zero.

DBI for HRMS does not count long-term absence as a transfer out, nor an employee's return from a long-term absence as a transfer in.

How DBI for HRMS Calculates Employee Hires

DBI for HRMS counts employee hires that occur within the reporting period. A Hire value represents the headcount of an assignment on the associated person's hire date, page Glossary-15.

Calculations that DBI for HRMS Performs on Employee Hires

DBI for HRMS performs the following calculations on hires:

- **Total**

This returns the sum of hires within the reporting period.

How DBI for HRMS Calculates Employee Terminations

An employee terminates or separates from the enterprise the day after their termination date, page Glossary-31. They are still employed on their termination date.

DBI for HRMS counts employee terminations that occur within the reporting period. A Termination value represents the headcount of an assignment on the associated person's termination date.

Calculations that DBI for HRMS Performs on Employee Terminations

DBI for HRMS performs the following calculations on terminations:

- **Total**

This returns the sum of terminations within the reporting period.

Note: The information relating to terminations displayed in the Turnover reports varies from the information displayed in the Terminations report. See Variations in Turnover and Termination Calculations, page 1-22

How DBI for HRMS Calculates Turnover

Turnover represents the percentage of people who have left a Manager hierarchy over a given period.

DBI for HRMS calculates turnover as the total number of terminations at the effective date, divided by either:

- The total headcount of active employees at the effective date.
- The total headcount of active employees at the effective date, plus the total headcount of active employees at the start of the reporting period, divided by 2.

For example, if a manager had five terminations within the reporting period, and he had a headcount total of 52 at the start of the reporting period and 50 at the end of the reporting period (there were three hires), the two methods of turnover calculation yield:

- $5/50 = 10\%$
- $5/((50+52)/2) = 5/51 = 9.8\%$

Your system administrator sets a profile option, HRMS BIS Turnover Calculation Method, to determine which method DBI for HRMS uses.

Note: The information relating to terminations displayed in the Turnover reports varies from the information displayed in the Terminations report. See Variations in Turnover and Termination Calculations, page 1-22

Calculations

DBI for HRMS performs the following calculations on turnover:

- **Total**

This returns the sum of turnover.

- **Annualized Turnover**

Some DBI for HRMS reports and KPIs annualize turnover before reporting on it. Annualization enables DBI for HRMS to display the equivalent turnover for the whole year, whatever reporting period you select.

DBI for HRMS calculates annualized turnover by multiplying the turnover value for the reporting period by 365, and dividing the result by the number of days in the reporting period, or sub-period for trend reports.

For example, if a manager had 10% turnover within a 30-day reporting period, the annualized turnover calculation will be: $10\% * (365/30) = 121.7\%$

How DBI for HRMS Calculates Length of Service

Several reports provide you with information about your employees' length of service.

For active employees, page Glossary-1, DBI for HRMS calculates their length of service from their hire date, page Glossary-15 to the effective date, page Glossary-11. For employees who have terminated before the effective date, DBI for HRMS calculates their length of service from their latest hire date to their latest termination date, page Glossary-31.

DBI for HRMS groups the length of service values into Length of Service Bands. A Length of Service Band is a user-defined period. You will have several Length of Service Bands for consecutive periods, for example <1 years, 1-3 years, 3-5 years, 5-10 years, and >10 years.

For a Length of Service Band to include a length of service, the hire date must be earlier than the effective date and the termination date (if any) must be later than the start of the reporting period.

Calculations that DBI for HRMS Performs on Length of Service

The following length of service calculations appear in DBI for HRMS reports:

- **Total**

This returns the total headcount with a length of service within a Length of Service band.

- **Average Years of Service**

DBI for HRMS calculates average years of service as the total length of service, divided by the number of employees.

How DBI for HRMS Calculates Performance

Several reports provide you with information about your employees' performance.

Employees usually get a performance rating as part of their performance review. Performance ratings are alphanumeric and therefore they are difficult to order in reports.

To simplify performance reporting, DBI for HRMS maps the performance ratings into user defined Performance bands. Performance bands have a simpler structure. The DBI for HRMS reports then compare employee performance across the bands.

If an assignment has no performance rating, or its rating is not mapped to a performance band, DBI for HRMS includes it in a "Not Rated" band.

Calculations that DBI for HRMS Performs on Performance

The following performance calculations appear in DBI for HRMS reports:

- **Total**

This returns the total number of employees whose performance rating falls within a Performance band.

- **Average**

This returns the average length of service. DBI for HRMS calculates average length of service as the total length of service, divided by the number of employees.

How DBI for HRMS Calculates Salary

DBI for HRMS uses the most recent (prior to the effective date) approved salary from assignment salary administration.

DBI for HRMS annualizes these salaries before reporting on them. Annualization enables DBI for HRMS to display the equivalent salary for the whole year, whatever the employees' payment period.

For example, it multiplies:

- Annual salary by 1
- Monthly (calendar) salary by 12
- Weekly pay by 52

DBI converts the annualized salaries to the reporting currency and rate you have selected in the Currency parameter, page 1-13, using the GL Daily Rates as at the effective date, page Glossary-11.

DBI for HRMS measures salaries at a point in time. The point in time may be:

- The start or end date of the reporting period
- For trend reports, the rolling Period dates within a reporting period

For information about reporting currencies, see: Implementation Considerations for Daily Business Intelligence in the *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide*.

Calculations that DBI for HRMS Performs on Salaries

DBI for HRMS performs the following calculations on salaries:

- **Total**

This returns the sum of annualized salaries for a specific date.

- **Average**

This returns the average of annualized salaries for a specific date. DBI for HRMS calculates average salary as the sum of all annualized salaries divided by the sum of the headcount values of assignments (not divided by the number of assignments).

Note: The use of headcount values instead of the number of assignments is unlikely to affect the values in your reports, since all assignments typically carry a headcount value of 1.

How DBI for HRMS Parameters Affect Reports

This section describes all the parameters available in Oracle DBI for HRMS dashboards and reports, and how to use them effectively. Which parameters you see, depends on

which report you are viewing. See the individual report descriptions for details of which parameters are available for a specific report.

You can control the output of the dashboards and linked reports by selecting values from the parameter lists. Every time you change a report or dashboard parameter, the reports automatically refresh the data, so that you view only the business information you are interested in.

Parameters are one of the following two types:

- **Single-select**

These parameters enable you to choose one value from the parameter list.

- **Multi-select**

These parameters enable you to choose multiple values from the parameter list. The default value of multi-select parameters is All.

Effective Date

The Effective Date parameter defines the effective date of your reports. The effective date represents the end of the reporting period, and determines the information that appears on dashboards and in reports.

The default date 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 setup. For more information, see: *Daily Business Intelligence Implementation Guide* on Metalink (technical note number: 271413.1).

Event-based information, like hires and terminations, have their own dates (hire date and termination date). For DBI for HRMS to include these events, those dates must occur within the reporting period defined by the Effective Date and the Period, page 1-9 parameters.

For further information on this parameter see: Date Parameter in *Oracle E-Business Intelligence Daily Business Intelligence User Guide*.

Period

The Period parameter lists the following values:

- Rolling 7 Days
- Rolling 30 Days
- Rolling 90 Days
- Rolling 365 Days

The periods are "rolling", because the period you are viewing in the report moves as you change the Effective Date, page 1-9 and Compare To, page 1-11 parameters.

Select a rolling period to determine the reporting period. Your reporting period ends at the effective date. It starts at effective date minus the rolling period you have selected, plus 1 day.

For example, if the effective date is 15-Aug-2004 and you select a Period of Rolling 30 Days, then the reporting period start date is 17-July-2004 (15 Aug 2004, minus 30 days, plus 1 day).

The following examples show you how the reporting period changes depending on the Period you select:

Effective Date (Reporting Period End Date)	Period	Reporting Period Start Date
15 Oct 2004	Rolling 7 Days	15 Oct 2004 - 7 + 1 = 9 Oct 2004
15 Oct 2004	Rolling 30 Days	15 Oct 2004 - 30 + 1 = 16 Sep 2004
15 Oct 2004	Rolling 90 Days	15 Oct 2004 - 90 + 1 = 18 Jul 2004
15 Oct 2004	Rolling 365 Days	15 Oct 2004 - 365 + 1 = 17 Oct 2003

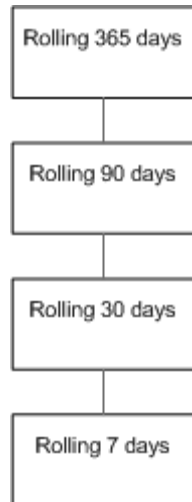
This parameter also determines the periods that the trend reports compare. Trend reports show you the change in values over several rolling periods, depending on which Period you select, as follows:

- **Rolling 7 Days:** displays data for 13 dates at 7-day consecutive intervals, ending with the effective date.
- **Rolling 30 Days:** displays data for 12 dates at 30-day consecutive intervals, ending with the effective date.
- **Rolling 90 Days:** also depends on the value you select in the Compare To parameter:
 - When you compare to the Prior Period, displays data for 8 dates at 90-day consecutive intervals, ending with the effective date.
 - When you compare to the Prior Year, displays data for 4 dates at 90-day consecutive intervals, ending with the effective date.
- **Rolling 365 Days:** displays data for 4 dates at 365-day consecutive intervals, ending with the effective date.

Note: The reports display the full number of data points for the selected Period only if your system has collected the relevant data. If you appear to be missing recent data, see: Troubleshooting DBI for HRMS Reports, page 1-18

Navigate the Time Hierarchy

DBI bases rolling periods on a Time hierarchy, with the following structure:



This time hierarchy enables you to drill through the trend reports, from a large reporting period, through to a smaller reporting period.

For example, if you view a trend report for rolling 365 days (comparing consecutive 365-day periods), you may want a breakdown of the data within one of the 365 day periods. Click on the date of the 365-day period to change the trend report to view rolling 90-day periods for the selected date.

You can similarly drill on the dates for each 90-day period to view 30-day periods, and drill on 30-day period dates to view 7 day periods.

The date you have clicked on becomes the effective date.

As you drill down the time hierarchy, the value in the Period parameter changes accordingly. You can use the Period parameter to return to the larger time periods.

Compare To

Use this parameter to compare the change in values between the reporting period and either one period prior (using the Period parameter) or one year prior. This parameter affects the Change columns.

Select one of the following two comparison types:

- **Prior Year**

If you select Prior Year, the Change columns compare the current value to the value one calendar year ago, or to values within the previous year.

- **Prior Period**

If you select Prior Period, the Change columns compare the current value to either the same point in the previous reporting period, or to the previous reporting period. So, if you have selected a period of Rolling 30 Days, the Change columns compare the current value to the value of 30 days ago, or to values within the previous 30 day period.

Whether the Change column compares values for dates or periods depends on the nature of the report. If the report is measuring values for a point in time (such as headcount or salary), the Change column compares dates; if it is measuring values over a period of time (such as hires within a period), the Change column compares periods.

The table below shows the actual days that are compared for an effective date of 12th June 2004, if you select a value of Rolling 30 days in the Period parameter:

Measure type	Compare To parameter value	Compares Change From	To
Point in Time (for example, a measurement of headcount or salary)	Prior Period	13 May 2004 (<i>Effective Date - 30 days</i>)	12 June 2004 (<i>Effective Date</i>)
Point in Time (for example, a measurement of headcount or salary)	Prior Year	13 June 2003 (<i>Effective Date - 365 days</i>)	12 June 2004 (<i>Effective Date</i>)
Events in a Period (for example, a measurement of the number of hires)	Prior Period	The 30-day period, 30 days prior to the effective date: the period from 14 April 2004 (<i>Effective Date - 30 days - 30 days + 1 day</i>) to 13 May 2004 (<i>Effective Date - 30 days</i>)	The 30-day period from 14 May 2004 (<i>Effective Date - 30 days + 1 day</i>) to 12 June 2004 (<i>Effective Date</i>)
Events in a Period (for example, a measurement of the number of hires)	Prior Year	The 30-day period, 365 days prior to the effective date: the period from 15 May 2002 (<i>Effective Date -365 days - 30 days + 1 day</i>) to 13 June 2003 (<i>Effective Date - 365 days</i>)	The 30-day period from 14 May 2004 (<i>Effective Date - 30 days + 1 day</i>) to 12 June 2004 (<i>Effective Date</i>)

Manager

This parameter displays a list of managers, page Glossary-18 within your Manager hierarchy, page 1-13. It enables you to drill down from yourself to your subordinate managers. You cannot select your peers, or your superior managers.

DBI for HRMS displays information related to workforce changes that occur within the selected manager's hierarchy. When you choose another manager, each report changes to display information relating to the manager you select.

The Manager list initially displays your name (as the currently selected manager), followed by an indented list of your subordinate managers. As you drill down the Manager hierarchy, the list displays your selected manager and the selected manager's subordinate managers. It continues to display managers higher in the hierarchy, so you can navigate back up the tree again. The list uses indentation to distinguish between managers at various levels.

The parameter list only displays people who supervise assignments (either directly or indirectly) with a headcount total greater than zero on the effective date.

Direct Reports

The Manager parameter affects all reports, but has a specific impact on those that display information for each manager. The Manager column of these reports lists the managers that directly report to the manager you select in the parameter. Each subordinate manager's row provides information about the workforce reporting to that subordinate manager. In addition, a Direct Reports row provides information about those managers that directly report to the selected manager.

For example, if you view the Staff Summary Status report by manager, it displays a row for each manager that directly reports to the selected manager. Each row provides headcount, salary, and turnover information for the workforce that each subordinate manager is responsible for. The Direct Reports row provides information on the total headcount, salary, and turnover of managers that directly report to the selected manager.

Understanding the Manager Hierarchy

This section provides information about how the Manager hierarchy is structured and which employees are included in the hierarchy.

The Manager hierarchy is based on the supervisor link on the primary assignments of employees.

HRMS records the start and end date of each relationship between a supervisor and subordinate. If the relationship is current, there is no end date. DBI uses these start and end dates to calculate the transfers in and out of a manager's hierarchy. To understand how DBI for HRMS counts assignment transfers from one manager to another, see: *How DBI for HRMS Calculates Employee Transfers*, page 1-4

Your system administrator can exclude certain types of employees, such as temporary employees or students, from DBI for HRMS reports. The reports do not count excluded employees. The Manager hierarchy, however, does include excluded employees, in order to maintain the hierarchy structure. The Manager hierarchy does not include contingent workers.

If a supervisor link is missing for any reason, this will affect the structure of the Manager hierarchy, and can result in reports omitting data. For further information, see: *Disconnections from the Manager Hierarchy in Troubleshooting DBI for HRMS Reports*, page 1-18

Currency

Use the Currency parameter to select the currency and exchange rate that DBI uses to display monetary values. The parameter lists two currencies - a primary currency, and a secondary currency. Each currency is shown against the name of an associated exchange rate. The primary and secondary currencies may be different currencies at the same rate, or the same currency at different rates, or different currencies at different rates.

When you switch currencies, DBI converts all the salaries to your selected currency using the GL Daily Rate for the associated exchange rate as at the effective date. The default currency for all dashboards is the primary global currency.

For information about reporting currencies, see: *Implementation Considerations for Daily Business Intelligence in the Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide*.

For further information on this parameter see: *Currency Parameter in Oracle E-Business Intelligence Daily Business Intelligence User Guide*.

Country

Use this multi-select optional parameter to report on workforce activity in one or more specific countries. The parameter lists all the countries recorded for your enterprise.

If you make a selection, the reports only display information for assignments where the country of the work location matches one of your selected countries.

The default value for this parameter is All. When displaying values for All countries, reports categorize assignments with no associated country as Unassigned.

This parameter is especially useful when comparing salaries and jobs.

Job Function

You can use this optional multi-select parameter to restrict report information to employees in specific areas of work. The parameter lists all the job functions recorded for your enterprise. The default value is All.

Reports only display information for assignments with a job within your selection of job functions.

When displaying values for All job functions, reports use an Unassigned category to display information for assignments with no job, or with a job that is not linked to a selected job function.

For more information on job functions, see: Job Hierarchy, page 1-14

Job Family

You can use this optional multi-select parameter to restrict report information to employees in specific areas of work. The parameter lists all the job families recorded for your enterprise. The default value is All.

Note: The parameter list may include duplicates if you have a job family listed within more than one job function. See Job Hierarchy, page 1-14

Reports only display information for assignments with a job within your selection of job families.

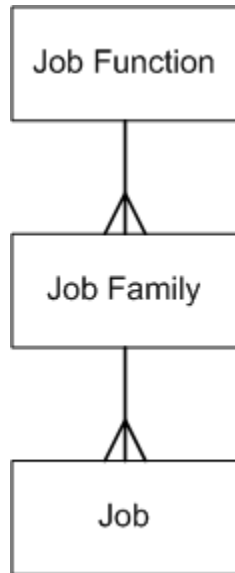
When displaying values for All job families, reports use an Unassigned category to display information for assignments with no job, or with a job that is not linked to a selected job function/family.

Understanding the Job Hierarchy

This section explains how the Job hierarchy is structured.

DBI for HRMS supports a job hierarchy that consists of job function and job family. Your system administrator defines the Job hierarchy.

Typically, one job function is associated with a number of job families, and each job family is associated with a number of jobs. One job typically appears in one job family and each job family typically appears in one job function.



It is possible, however, for two job families in two different job functions to have the same name.

Your system administrator may not have set up this hierarchy, or may have set up only Job Function or Job Family. If this hierarchy is incomplete, or does not exist, no values appear in the Job Function or Job Family parameters. When you view a report by either Job Function or Job Family, the report categorizes all assignments as Unassigned.

Leaving Reason

When employees separate from your organization, an HR user records their leaving reason. Use this parameter to examine information associated with one or more leaving reasons.

This multi-select optional parameter lists all the leaving reasons recorded for your enterprise. Reports only display information for assignments where the leaving reason recorded against the employee matches one of your selected leaving reasons.

The default value for this parameter is All.

You can also choose to view employees by Termination Category, page 1-17

Length of Service Band

DBI for HRMS groups employees' length of service into user-defined Length of Service Bands. Use this parameter if you want to investigate employees whose length of service falls within a specific length of service band.

This single-select optional parameter lists all the Length of Service Bands. Reports only display information for the assignments of employees who have a length of service within the selected band range.

The default value for this parameter is All.

For information on how DBI for HRMS derives length of service, see How DBI for HRMS Calculates Length of Service, page 1-7

Performance Band

DBI for HRMS groups employees' performance ratings into user-defined Performance Bands. Use this parameter if you want to investigate employees whose performance ratings fall within a specific performance band.

This single-select optional parameter lists all performance bands, plus a value of Not Rated.

Reports only display information for the assignments of employees who have a performance rating within the band range you have selected. If you select Not Rated, the reports display information for assignments that don't have a performance band or rating, or assignments that have a performance rating that is not mapped to a band, or assignments that have a performance rating that occurred before the start of the reporting period.

The default value for this parameter is All.

For information on how DBI for HRMS derives performance, see *How DBI for HRMS Calculates Performance*, page 1-7

Staff

Use this parameter to control whether a report displays only the direct reports of the selected manager, or all assignments associated with the selected manager.

This single-select mandatory parameter has two values:

- Direct Reports

The report displays only people who report directly to the selected manager.

- All

The report displays all employees within the selected manager's hierarchy.

DBI pre-selects a value for this parameter, depending on which link you select on the dashboard to access the report. You can use one of two methods to access a report that contains the Staff parameter:

- Select Direct Reports from the Manager column.

This action sets the Staff parameter to Direct Reports.

- Select a value, for example a headcount value.

This action sets the Staff parameter to All.

If the parameter has a value of Direct Reports, the report only lists the direct reports of the manager displayed in the Manager parameter. If the parameter has a value of All, the report lists all the assignments that comprise the value that you selected in the dashboard.

For example, if you are examining the Headcount Activity by Manager Status for manager B. Green, and B. Green has a direct report, C. Brown, who has had 3 transfers out of his Manager hierarchy in the reporting period, you could take one of the following actions:

- Select Direct Reports.

This action enables you to view the Employee Details of the direct reports of manager B. Green. The Staff parameter displays Direct Reports.

- Select the Minus Transfer value (3) for C. Brown.

This action takes you to the Headcount Reorganization (Minus) Detail report, where you can view details of all employees who have transferred out of C. Brown's hierarchy, irrespective of whether they report directly to C. Brown. The Staff parameter displays All.

Termination Category

You can use this single-select parameter to focus on people who have separated from your Manager hierarchy either voluntarily or involuntarily.

Leaving reasons are associated with a termination category, page Glossary-30 of either Voluntary and Involuntary. This parameter lists these two categories.

When you use this parameter, reports only display information for the assignments of employees who have a leaving reason within your selected category.

The default value for this parameter is All.

View By

This single-select, mandatory parameter enables you to change the category by which you view your report data. The View By value affects the first column of your reports, enabling you to compare your data across a different set of criteria.

The categories available in the View By parameter vary across reports. See the individual report description for details.

You can choose from the following View By categories:

Country View By

When you select this View By value, the first column of the report displays a list of countries relevant to the manager selected in the Manager parameter, and the report data is categorized by country.

The report only displays the countries associated with assignment work locations for those assignments reporting to the selected manager. Assignments for the selected manager, that are not associated with a country, appear in an Unassigned row.

Job Function View By

When you select this View By value, the first column of the report displays a list of job functions relevant to the manager selected in the Manager parameter, and the report data is categorized by job function.

The report only displays the job functions associated with those assignments reporting to the selected manager. Assignments not associated with a job function appear in an Unassigned row.

See Job Hierarchy, page 1-14 for more information on job functions and families.

Job Family View By

When you select this View By value, the first column of the report displays a list of job families relevant to the manager selected in the Manager parameter, and the report data is categorized by job family.

The report only displays the job families associated with those assignments reporting to the selected manager. Assignments not associated with a job family appear in an Unassigned row.

See Job Hierarchy, page 1-14 for more information on job functions and families.

Leaving Reason View By

You can use this value to view the report data by leaving reasons. The first column will list all the leaving reasons recorded against employees who terminated in the reporting period, and who reported to the selected manager on their termination date.

Terminations with no leaving reason appear in an Unassigned row.

Length of Service Band View By

You can use this value to view the report data by length of service bands. The first column will list the length of service bands for those employees who report to the selected manager.

Manager View By

When you select this View By value, the first column of the report displays a list of managers, page Glossary-18 relevant to the manager selected in the Manager parameter, and the report categorizes your HRMS data by manager.

Performance Band View By

You can use this value to compare the report data by performance bands. If you choose this View By, the first column lists the performance bands for those employees who report to the selected manager.

Termination Category View By

If you change the View By parameter to Termination Category, the first column lists the termination categories. This enables you to compare the report data by termination category.

Time View By

If you choose to view by Time, your reports will compare your HRMS data across time periods, depending on your effective date, and your selected period.

To understand which periods the report compares, see: Period parameter, page 1-9

Troubleshooting DBI for HRMS Reports

You may find from time to time that the data in DBI for HRMS does not look the way you expect. Check the issues below for a possible explanation.

Excluded Events

Typically, your system administrator sets your system to collect HRMS information daily, or on a frequent enough basis for your reporting needs.

DBI information does not include events that occur between the effective date and the last collection date. For example, if your system collects data weekly on Sunday

nights, the reports you view just after the collection (say Monday morning) contain up-to-date information. However, if you view the same report on Wednesday, it only includes information up to the last collection on Sunday. If you view the report on Saturday, it still only contains information up to the previous Sunday.

This issue applies to all time periods, but will be more obvious for smaller time periods. If you select Rolling 7 Days in the Period parameter, page 1-9, this effect is quite marked because the number of hires, terminations and transfers decreases every day.

If your DBI for HRMS reports appear to exclude recent events as described above, and this does not suit your reporting requirements, you should contact your system administrator.

Excluded Employees

HRMS for DBI reports may not include all of your employees. A formula enables your system administrator to categorize employees according to their person type, then exclude groups from DBI for HRMS reports as required. For example, you can use this method to identify temporary employees or students and exclude them from reports.

Contact your system administrator to find out which employee groups are excluded.

All reports exclude all contingent workers, that is people with a system person type of contingent worker and assignments with a type of contingent worker. All the reports, apart from the Salary reports, exclude assignments with zero headcount.

Missing Employees

The manager hierarchy is based on the supervisor link on the primary assignments of employees. If the supervisor link is missing for any reason, this loss affects the structure of the manager hierarchy, and can result in erroneous data, and reports omitting employees and their subordinates.

Caution: For accurate reporting, the Manager hierarchy must not contain any broken links. A broken link occurs if employees who are not at the top of the hierarchy do not have a link to a supervisor. The Oracle Alert, HRMS Alert - People Without a Supervisor, lists employees who have no supervisor or who have a terminated supervisor.

New Hires Missing the Supervisor Link

If an HR end user fails to allocate a supervisor to an employee on the employee's hire date, this omission can result in erroneous data.

If the hire occurred prior to the reporting period and the HR end user allocated a supervisor during the reporting period, DBI does not count the employee as a transfer or hire into the Manager hierarchy. DBI will, however, adjust the headcount of the supervisor.

If the hire occurred during the reporting period, and the omission is also corrected during the reporting period, DBI will count the new hire in reports as usual.

Disconnections from the Manager Hierarchy

If the supervisor link is removed for any reason, it causes a disconnection within the Manager hierarchy. Disconnections are a data issue and DBI for HRMS never counts connections, disconnections and re-connections as any activity at all.

If a person becomes disconnected from the Manager hierarchy, DBI does not count the person, or their subordinates, as a transfer out. If the person, or their subordinates, terminate after becoming disconnected, DBI does not count their termination.

Headcount and salary calculations, and other dependent calculations, are based on connections within the hierarchy. If disconnections exist, the headcount and salary calculations may not match the changes in movements within the hierarchy.

The Oracle Alert, HRMS Alert - People Without a Supervisor, lists employees who have no supervisor or who have a terminated supervisor.

If such discrepancies appear in your reports, contact the person responsible for data entry.

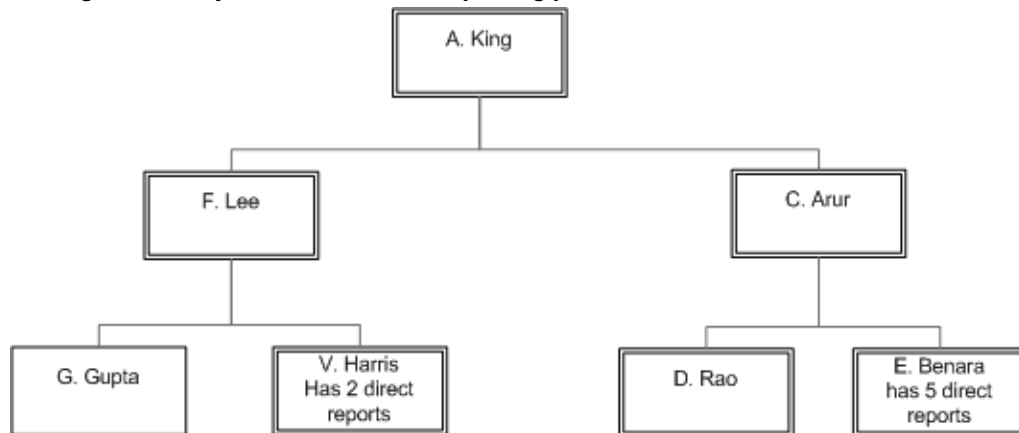
When the Hire, Termination, and Transfer Totals Don't Tally

A discrepancy between the Hire, Terminations and Transfer column values, and the totals of these columns, can occur if a subordinate manager leaves the selected manager's hierarchy prior to the effective date.

The absent manager does not appear in the Manager parameter list, nor in any reports, even if they were managers within the reporting period. However, DBI still displays any management activity (hires, transfers, or terminations) of the absent manager in the total line of the selected manager. In which case, the Hire and Termination column values may not add up to the Total values.

Consider the following example. At the start of the reporting period, A. King manages F. Lee and C. Arur. F. Lee manages G. Gupta and V. Harris who has 2 direct reports. C. Arur manages D. Rao, and E. Benara, who has 5 direct reports.

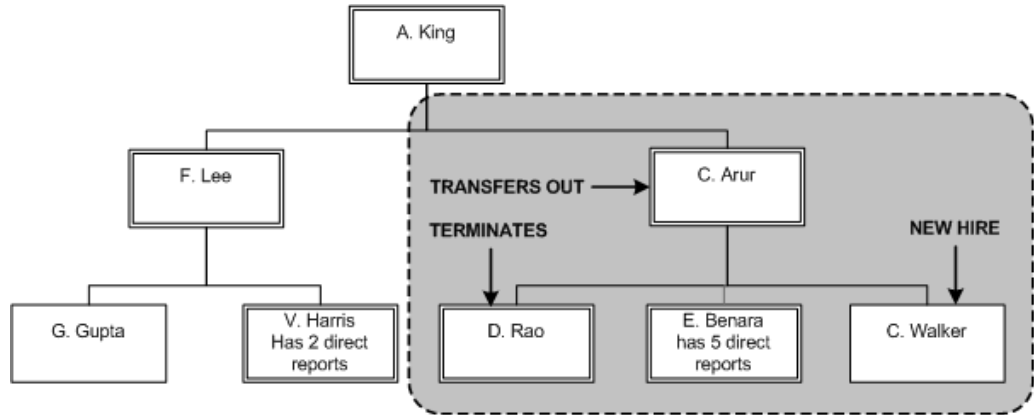
A. King's hierarchy at the start of the reporting period



During the reporting period, the following events occur within A. King's hierarchy:

- D. Rao separates from the enterprise.
- C. Arur hires C. Walker as a direct report.
- C. Arur transfers out of A. King's hierarchy, taking his subordinates with him.

Changes occurring in A. King's hierarchy during the reporting period



Within A. King's hierarchy there has been one hire, one termination, and 8 transfers out. The transfers out comprise C. Arur, E. Benara, E. Benara's 5 direct reports, and C. Walker.

These changes leave only two managers within A. King's hierarchy: F. Lee, and V. Harris. DBI for HRMS reports these changes in A. King's hierarchy as follows:

Manager	Start	Hires	Transfers In	Terminations	Transfers Out	End
F. Lee	4	0	0	0	0	4
Direct Reports	2	0	0	0	1	1
Total	13	1	0	1	8	5

The table above tells you that there has been no change in the number of subordinates reporting to F. Lee during the reporting period. It also tells you that A. King had 2 people reporting to him directly at the start of the reporting period, one of which transferred out (C. Arur), leaving one direct report (F. Lee) at the end of the reporting period. In total, A. King started with 13 subordinates. During the reporting period, there has been one hire, one termination and 8 transfers out of A. King's hierarchy, leaving him with 5 subordinates in total.

The figures accurately reflect the changes to managers' hierarchies. The Total row refers to the total changes that have occurred in A. King's hierarchy. Since C. Arur and E. Benara are no longer in A. King's hierarchy, their gains and losses appear in A. King's total figures, but not separately. Thus the column totals do not match the column values.

When Headcount Totals Don't Tally

An increase or decrease in the value of an assignment's headcount is neither a hire, a transfer, nor a termination. You will therefore not see a change in the values in the Hire, Transfer, or Termination columns.

An change in the headcount value will, however, affect headcount totals and may be the cause of discrepancies in the overall values of a report.

Typically, all assignments have a headcount value of 1, so this issue rarely arises.

Variations in Turnover and Termination Calculations

The Termination column of the Headcount reports displays all assignments that ended during the reporting period. By contrast, the Turnover reports display only assignments that ended at the time of an employee's termination.

Take the following example:

An employee has four assignments, each with a headcount value of 1. Assignment 1 ends 1st March. Assignment 2 ends 5th June. The employee terminates on 3rd July, which ends assignments 3 and 4.

If your reporting period is 1st June to 31st July, then assignment 1 is not counted at all.

The Headcount reports show a termination value of 3. This counts the assignment that ended on 5th June, and the two that ended on the termination date.

By contrast, the Turnover reports show a termination value of 2, since these reports only count the assignments that end on the termination date.

Variations in Listed Managers

You will not always be able to use the Manager parameter to navigate to all the managers that appear in the Headcount and Annualized Turnover reports. This limitation occurs because of an inconsistency between the managers displayed in the Manager parameter, and those displayed in the Headcount and Annualized Turnover reports.

The Headcount reports include all managers who report to the selected manager at the effective date. They also include people who report to the selected manager at the effective date, are not currently managers, but had some headcount gains or losses during the reporting period.

The Annualized Turnover reports include all people who report to the selected manager at the effective date. They also include people who report to the selected manager at the effective date, are not currently managers, but had subordinates who terminated during the reporting period.

By contrast, the Manager parameter, and other reports, only list employees who are a manager on the effective date, irrespective of their status during the reporting period.

No Job Functions or Job Families

If no values appear in the Job Function or Job Family parameters, and reports categorizes all assignments as Unassigned when you view by Job Family or Job Function, the Job hierarchy is incomplete or missing.

If you need to report on assignments by Job Function or Job Family, contact your system administrator.

Diagnose your Data

DBI for HRMS is based on collected data. If discrepancies appear your reports, you can run the HRMSi (DBI) Diagnostics Data Setup report to check the collected HRMS data.

You can run this report in two modes:

- **Count Mode**

The Count mode provides you with a summary of all the objects you report on, such as the total number of people, and the total number of assignments.

- **Detail Mode**

The Detail mode provides detailed information about the objects you report on.

This mode includes two parameters, Section and Subsection. These parameters enable you to choose which reporting area you wish to view, for example, Assignments without a salary, or Salary Total by Supervisor. You must select a section from the Section parameter list, but the Subsection parameter is optional.

HR Management - Overview

HR Management - Overview

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

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

Parameters

The HR Management - Overview dashboard uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13

Key Performance Indicators (KPIs)

The HR Management - Overview dashboard provides KPIs that display a summary of workforce activity changes and salary changes in your enterprise for a given date with a percentage change, within the selected period. You can view the analytical data for the manager selected in the dashboard parameter using the following KPIs:

- Total Headcount: calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy. You can access the Headcount Activity by Manager Status report, page 1-26 from this KPI.
 - Average Years of Service: calculates the average length of service for all current employees in the manager's hierarchy.
- Total Employee Salary: calculates the total annualized salary at the effective date for all employee assignments in the manager's hierarchy. You can access the Staff Summary Status report, page 1-25 from this KPI.
 - Average Salary: calculates the average annualized salary at the effective date for all employee assignments in the manager's hierarchy.
- Total Annualized Turnover: calculates the total annualized turnover in the reporting period for all employee assignments in the manager's hierarchy. You can access the Turnover Summary Status report, page 1-49 from this KPI.
 - Annualized Voluntary Turnover: calculates the total annualized turnover in the reporting period for all employee assignments in the manager's hierarchy.
 - Annualized Involuntary Turnover: calculates the involuntary annualized turnover in the reporting period for all employee assignments in the manager's hierarchy.

For information on KPI calculations, see: How DBI for HRMS Derives Report Values, page 1-3

Headcount and Salary Trend

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

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

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13
- Time, page 1-18

Calculations

There are no calculations in this report.

Staff Summary Status

The Staff Summary Status report displays the headcount, average annualized salary, and the total annualized salary based on the effective date for all employee assignments in the manager's hierarchy. The list of managers includes those employees who report directly to the selected manager, and who have a total headcount greater than zero or who have a zero headcount with some activity in the reporting period such as hires, terminations, transfers, secondary assignment starts, and ends. The report also calculates the voluntary annualized turnover, involuntary annualized turnover, and the total annualized turnover based on the reporting period for all employee assignments in the manager's hierarchy. You can obtain information such as the headcount, salary, and turnover changes by country, job groups, performance band, and length of service. If the headcount is zero and there have been no terminations in the selected period, the report does not display the manager.

The Change percent graphs display the changes in the headcount, total salary, and annualized salary between the effective date and the reporting period of the employees based on the Compare To parameter .

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13

- Country, page 1-14
- Job Function, page 1-14
- Job Family, page 1-14
- Length of Service Band, page 1-15
- Performance Band, page 1-16
- Termination Category, page 1-17
- Leaving Reason, page 1-15
- View By, page 1-17

Calculations

This report uses the following calculations:

- Manager, page Glossary-18
- Headcount, page 1-3
- Salary, page 1-8
- Annualized Turnover, page 1-6

Related Reports and Links

You can access the following reports from the links in this report:

- Staff Summary Status (for a specific manager): available from the Manager column values.
- Employee Detail report , page 1-36 available from the Total (Headcount) column values and Direct Reports.
- Turnover Detail report , page 1-40 available from the Involuntary (Annualized Turnover), Voluntary (Annualized Turnover), and Total (Annualized Turnover) column values.
- Drill/Pivot reports: Depending on the parameter that you select, you can view the drill reports that include details about the country, job function, job family, performance band, and length of service band for which the manager has a headcount. For further information, see: Drill and Pivot in *Oracle E-Business Intelligence Daily Business Intelligence User Guide*.

Headcount Activity by Manager Status

This report displays the total employee headcount of the direct reports for the selected manager. This report calculates the start and end headcount based on the effective date and reporting period for all employee assignments in the manager's hierarchy.

The report displays one row for each direct report of the selected 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 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 Change Percent by Manager graph shows the percentage change in the headcount over the reporting period for the direct reports of the top line manager. The percentage is calculated as $(\text{Current Headcount} - \text{Previous Headcount}) * 100 / \text{Previous Headcount}$. The End Headcount by Manager graph shows the headcount at the end of the reporting period, calculated as $\text{Start Headcount} + \text{Hires and Transfers (Plus)} - \text{Terminations and Transfers (Minus)}$.

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. As you drill down the reports display transfers for individual managers within the hierarchy. For the manager, if people are moved around within the same hierarchy, but are still under the same main manager then DBI does not count this in the grand total for transfers in and out columns, and it will not impact the end headcount either. For more information, see: Transfer, page 1-4

The Termination column of the Headcount reports displays all assignment ends that occurred during the reporting period. By contrast, the Turnover reports display only assignment ends that were active at the time of termination.

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.

Parameters

This report uses the following parameters:

- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12

Calculations

This report uses the following 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.
- Transfer (Plus): The total headcount transferred in during the reporting period.
- Transfer (Minus): The total headcount transferred out during the reporting period.
- Termination (Minus): The total headcount terminated during the reporting period.
- End Headcount: The headcount at the end of the reporting period, calculated as:
 $\text{Start Headcount} + \text{Hires and Transfers (Plus)} - \text{Terminations and Transfers (Minus)}$
- 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:

$(\text{Current Headcount} - \text{Previous Headcount}) * 100 / \text{Previous Headcount}$

Reports and Links

You can access the following reports from the links in this report:

- Headcount Hire Detail report , page 1-28 available from the Plus-Hire column values.
- Headcount Reorganization (Plus) Detail report , page 1-29 available from the Plus-Transfer column values.
- Headcount Termination Detail report , page 1-30 available from the Minus-Termination column values.
- Headcount Reorganization (Minus) Detail report , page 1-29 available from the Minus-Transfer column values.
- Employee Detail report , page 1-36 available from Direct Reports.

Headcount Hire Detail

You access this report from the Plus-Hire column in the Headcount Activity by Manager 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 the selected manager's hierarchy in a given period, including secondary assignment starts and contingent workers rehired as employees. The application includes secondary assignment starts only if the secondary assignment is associated with an assignment value or is included in the fast formula. The report excludes assignments that have a zero headcount value.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12
- Staff, page 1-16

Calculations

This report includes the following calculations:

- Name: The employee's name.
- Manager, page Glossary-18
- Department, page Glossary-10
- Country: The employee's country, based on the assignment location.
- Job: The employee's job title.
- Hire Date: The employment start date.

Headcount Reorganization (Plus) Detail

You access this report from the Plus-Transfer column in the parent Headcount Activity by Manager report. The report displays the employee records that comprise the total value you drilled from in the Headcount Activity by Manager report, including reorganizations.

The report provides information about employees who have moved into the selected manager's hierarchy.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12
- Staff, page 1-16

Calculations

The report uses the following calculations:

- Name: The employee's name.
- Manager, page Glossary-18
- 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.
- Country: The employee's country, based on the assignment location.
- Job: The employee's job title.
- Transfer Date: Transfer date of an employee.

Headcount Reorganization (Minus) Detail

You access this report from the Minus-Transfer column in the parent Headcount Activity by Manager Status report.

The report displays the employee records that comprise the total value you drilled from in the Headcount Activity by Manager Status report, including reorganizations. The report provides information about employees who have moved out of the selected manager's hierarchy.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12
- Staff, page 1-16

Calculations

This report uses the following calculations:

- Name: The employee's name.
- Manager, page Glossary-18
- 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.
- Country: The employee's country, based on the assignment location.
- Job: The employee's job title.
- Transfer Date: The last day of the reporting to the current manager.
- Length of Service (Years), page 1-7
- Performance Band, page 1-16

Headcount Termination Detail

You access this report from the Termination column values in the Headcount Activity by Manager Status report.

The report displays the employee records that make up the total value you drilled from in the Headcount Activity by Manager region. The report lists employees who have terminated from the manager's hierarchy in the given period, together with supporting details.

Parameters

This report uses the following parameters:

- Period, page 1-9
- Manager, page 1-12
- Staff, page 1-16

Calculations

This report uses the following calculations:

- Name: The employee's name.
- Manager, page Glossary-18
- Department, page Glossary-10
- Country: The employee's country, based on the assignment location.
- Job: The employee's job title
- Termination Date, page Glossary-31 This will be empty for secondary assignment ends.
- Termination Reason: The employee's leaving reason. This will be empty for secondary assignment ends.
- Performance Band, page 1-16

- Length of Service (Years), page 1-7

Headcount for Top 4 Countries Trend

This report shows changes in headcount over time for the four countries with the highest headcount for the selected manager.

The report displays the total headcount for all subordinates in the manager hierarchy.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- View By - Time, page 1-18

Reports and Links

Drill reports for the rolling periods are available from the Time column values.

Average Salary for Top 4 Countries Trend

The Average Salary for Top 4 Countries Trend report calculates the average annualized salary over time for all employee assignments for each selected country. The reports ranks top four countries based on headcount as at the effective date. Assignments that are not associated with a country will appear in the Unassigned row, if the unassigned series is in the top four headcount.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13
- View By -Time, page 1-18

Reports and Links

You can the access the next level of report for the Rolling Date Hierarchy from the Time column values.

Headcount and Salary for Top 10 Countries

This report displays the total employee headcount, percentage headcount change, average salary and percentage average salary change for the top 10 countries with the highest headcount for the selected manager. It may also display an extra row of Unassigned 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 ten countries by the total employee headcount, then by the average salary, and finally by the alphabetical order of the country code for the manager. The Grand Total value displays the total for the manager selected in the Manager parameter.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13

Calculations

This report uses the following calculations:

- Headcount: Displays the total headcount by country for the manager as of the reporting date.
- Change (Headcount): The percentage change in headcount between the previous period and the current period. This is calculated as:

$$(\text{Current Headcount} - \text{Previous Headcount}) / \text{Previous Headcount} * 100$$

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 selected manager by country as of the reporting date.

$$\text{Total Salary} / \text{Total Headcount}$$

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

$$(\text{Current Average Salary} - \text{Previous Average Salary}) / \text{Previous Average Salary} * 100$$

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 Manager

The Salary by Manager report displays the employee total salary, average salary, and salary change percent of all managers for the selected manager.

The report displays one row for each direct report for the manager, if that direct report has at least one subordinate. The Salary report also displays one row for the direct report that includes those direct reports who do not have any subordinates.

The Total Salary Change Percent by Manager graph displays the percentage change in total salary between the start and end of the reporting period of all direct reports of the selected manager. The application calculates this as: $(\text{Current Total Salary} - \text{Previous Total Salary}) / \text{Previous Total Salary} * 100$. The Average Salary Change Percent by Manager graph displays the percentage change in average salary between the start and end of the reporting period of all direct reports of the selected manager. The application calculates this as: $(\text{Current Average Salary} - \text{Previous Average Salary}) / \text{Previous Average Salary} * 100$.

The Total Salary column displays the total salary for each direct report for your selected date. The report includes only salaries allocated to employee from the assignment Salary Administration. The report converts all annualized 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.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13

Calculations

This report uses the following calculations:

- Manager, page Glossary-18
- Total Salary: The total salary paid to employees reporting to the selected manager by country 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:
$$(\text{Current Total Salary} - \text{Previous Total Salary}) / \text{Previous Total Salary} * 100$$
- Average Salary: The average salary paid to employees reporting to the selected 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:

$$(\text{Current Average Salary} - \text{Previous Average Salary}) / \text{Previous Average Salary} * 100$$

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.

Reports and Links

You can access the following report from the links in this report:

- Staff Summary Status report , page 1-25 (for a specific manager) available from the Manager column names and Direct Reports.
- Salary by Job Function Status report, page 1-34 available from the Total Salary column values.
- Employee Detail report , page 1-36 available from Direct Reports.

Salary by Job Function Status

You can access this report from the Total Salary column in the parent Salary by Manager report.

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. All persons will be grouped under unassigned job function and unassigned job family. 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.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13

Calculations

This report uses the following calculations:

- Job Function: This column lists the job functions in which the selected manager has headcount.
- Headcount: The total headcount by job function as of the reporting date.
- Total Salary: The total salary paid to employees reporting to the selected 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:

$$(\text{Current Total Salary} - \text{Previous Total Salary}) / \text{Previous Total Salary} * 100$$
- Average Salary: The average salary paid to employees reporting to the selected 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:

$$(\text{Current Average Salary} - \text{Previous Average Salary}) / \text{Previous Average Salary} * 100$$

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.

Related Reports and Links

You can access the following reports from the links in this report

- Salary by Job Family Status report, page 1-35 available from the Job Function column names.

Salary by Job Family Status

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

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.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9

- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13
- Job Function, page 1-14

Calculations

This report includes the following 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 selected manager by job family 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:

$$(\text{Current Total Salary} - \text{Previous Total Salary}) / \text{Previous Total Salary} * 100$$

- Average Salary: The average salary paid to employees reporting to the selected 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:

$$(\text{Current Average Salary} - \text{Previous Average Salary}) / \text{Previous Average Salary} * 100$$

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.

Reports and Links

You can access the following report from the links in this report:

- Employee Detail report , page 1-36 available from the Total Salary column values.

Employee Detail

The Employee Detail report displays employees details such as name, current manager, assignment location, and length of service.

This report converts the salaries to the currency and the rate you select in the currency parameter.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9

- Manager, page 1-12
- Currency, page 1-13
- Staff, page 1-16
- Country, page 1-14
- Job Function, page 1-14
- Job Family, page 1-14
- Length of Service Band, page 1-15
- Performance Band, page 1-16

Calculations

This report includes the following calculations:

- Name: The employee's name.
- Manager, page Glossary-18
- Department, page Glossary-10
- Country: The employee's country, based on the assignment location.
- Job: The employee's job title.
- Local Salary: The employee's salary in local currency.
- Global Salary: The employee's salary as shown in the selected currency parameter. For more information, see: Currency, page 1-13
- Length of Service (Years), page 1-7
- Performance Band, page 1-16

Annualized Turnover Report

This report displays the annualized employee headcount turnover for the selected manager. The report categorizes turnover as either voluntary or involuntary.

The report displays one row for each direct report for the selected 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.

Report Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9

- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13

Calculations

This report includes the following calculations:

- Manager, page Glossary-18
- Terminations (Voluntary and Involuntary), page 1-5
- Total: The total percentage of headcount turnover.
- 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 selected.

If you select a comparison type of Prior Year, the Previous Turnover is the turnover a year prior to your selected date.

Reports and Links

You can access the following reports from the links in this report:

- Turnover Summary Status report , page 1-49 available from the Manager column values.

Annualized Turnover Trend

The Annualized Turnover Trend report shows changes in the employee headcount turnover over time for the selected manager. The report categorizes turnover into voluntary and involuntary separations.

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 the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- View By -Time, page 1-18

Calculations

This report includes the following 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.
- Voluntary and Involuntary, page 1-6

Reports and Links

You can access the next level of report for the Rolling Date Hierarchy from the Time column values.

Annualized Turnover by Manager Status

This report displays the voluntary annualized turnover, involuntary annualized turnover and the total annualized turnover based on the reporting period for all employee assignments in the selected manager's hierarchy.

The totals in this report are consistent with other turnover reports and turnover KPIs. The report also displays the percentage annualized turnover for the selected manager. The report displays one row for each direct report of the selected 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.

The Annualized Turnover by Manager graph displays the percentage of the voluntary and involuntary terminations for the direct reports of the top line manager. The Terminations by Manager graph displays the total voluntary and involuntary terminations for the direct reports of 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.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12

Calculations

This report uses the following calculations:

- **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:
$$\text{Start Headcount} + \text{Hires and Transfers (plus)} - \text{Terminations and Transfers (minus)}$$
- **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:
$$(\text{Total voluntary turnover this reporting period} - \text{Total voluntary turnover preceding reporting period}) * 100 / (\text{Total voluntary turnover preceding reporting period})$$
- **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:
$$(\text{Total involuntary turnover this reporting period} - \text{Total involuntary turnover preceding reporting period}) * 100 / (\text{Total involuntary turnover preceding reporting period})$$
- **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:
$$(\text{Total turnover this reporting period} - \text{Total turnover preceding reporting period}) * 100 / (\text{Total turnover preceding reporting period})$$

Calculations are based on assignments active at the separation date.

Reports and Links

You can access the following reports from the links in this report:

- **Annualized Turnover by Manager Status** report for a specific manager from the Manager column values.
- **Turnover Details**, page 1-40 available from the Terminations (Voluntary, Involuntary, and Total) column values.
- **Employee Detail** report , page 1-36 available from Direct Reports.

Turnover Detail

This report displays the total number of employees separated from the specified supervisor's hierarchy in the effective period. The report is the sum of the headcount of assignment ends that occur at the same time as a termination.

Parameters

This report uses the following parameters:

- Period, page 1-9
- Manager, page 1-12
- Staff, page 1-16
- Country, page 1-14
- Job Function, page 1-14
- Job Family, page 1-14
- Length of Service Band, page 1-15
- Performance Band, page 1-16
- Termination Category, page 1-17
- Leaving Reason, page 1-15

Calculations

This report uses the following calculations:

- Manager, page Glossary-18
- Department, page Glossary-10
- Job: The employee's job title.
- Hire Date, page Glossary-15
- Termination Date, page Glossary-31
- Termination Reason: The employee's leaving reason.
- Length of Service (Years), page 1-7
- Performance Band, page 1-16

Hire Salary Variance (Top 10) by Job

This report displays the average salaries of new hires and compares them against the salaries of existing people in the same job, for the selected manager. The report displays the ten jobs that have the greatest variance between average hire salary and average current salary.

The report converts all the salaries to the currency you select in the Currency parameter.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12

- Currency, page 1-13

Calculations

This report uses the following calculations:

- Job: The jobs in which the selected manager has new hires. The job title displays the business group legislation code.
- Hires: The total number of new hires by job during the time period selected in the Period Type parameter.

If you select a comparison type of Prior Period in the Compare To parameter, the report calculates the total number of new hires and their average salary during the last 7, 30, 90, or 365 days, depending on the Period Type you select.

- Average Salary Hires: The average salary of new hires by job.
- Average Salary Current: The average salary paid to the current employees of the selected manager by job. The New Hire Average Salary is not included in the Current Average Salary.
- Average Salary Variance: The salary variance between new hires' average salary and current employees' average salary by job for the selected manager. This is calculated as:

$$(\text{New Hire Average Salary} - \text{Current Average Salary}) * 100 / \text{Current Average Salary}$$

The report aggregates the number of hires, the average salary of new hires, and the average salary of current employees. The aggregates include all the subordinates of the selected manager, but exclude the selected manager.

HR Management - Headcount

HR Management - Headcount

The HR Management - Headcount dashboard displays Daily Business Intelligence reports for Oracle HRMS and provides a high-level summary of Human Resource measurements for the employee headcount in your enterprise. To use this dashboard you require the HR Line Manager or the Daily HR Intelligence responsibility.

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

Parameters

The HR Management - Headcount dashboard uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13

Key Performance Indicators (KPIs)

The HR Management Headcount dashboard contains new KPIs to enable you to see the number of high, mid, low, and not rated performers within your management hierarchy for a given date within the selected period. You can view the analytical data for the manager selected in the dashboard parameter using the following KPIs:

- Total Headcount: calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy. You can access the Headcount Activity by Manager Status report, page 1-26 from this KPI.
 - Average Years of Service: calculates the average length of service for all current employees in the manager's hierarchy.
 - Number of High, Mid, Low Performers and the Number Not Rated: calculate the headcount on the effective date for all employee assignments in the manager's hierarchy that are associated with a high, mid, low performance band. The Not Rated KPI includes the headcount of the employees not associated with any performance band. You can access the Headcount with Performance Bands Status report, page 1-44 from these KPIs.

For information on KPI calculations, see: How DBI for HRMS Derives Report Values, page 1-3

Headcount Ratio by Performance Band Trend

The Headcount Ratio by Performance Band Trend report displays the headcount change over time by performance band for the selected manager. The report calculates the employee headcount for each performance band for the selected manager if the assignment's performance rating falls within the performance band. The application calculates headcount ratio as: (Headcount for the manager or performance band

pair) / Total headcount for the manager. For more information on headcount calculation, see: How DBI for HRMS Calculates Headcount, page 1-3

The Not Rated column displays the percentage of employee assignments that do not have a performance rating or assignments that have a performance rating not mapped to a band or assignments that have a performance rating that occurred before the start of the reporting period.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- View By - Time, page 1-18

Reports and Links

You can access the next level of report for the Rolling Date Hierarchy from the Time column values.

Headcount Ratio with Performance Band Status

The Headcount Ratio with Performance Band Status report displays the total employee headcount and the headcount ratio for all employee assignments for each performance band for the selected manager. The list of managers includes employees who report directly to the manager defined by the parameter and who have a rolled up headcount greater than zero.

The report calculates headcount for all assignments for each performance band for a manager if the assignment's performance rating falls within the performance band. The headcount ratio is calculated as: (Headcount for the manager/Performance band pair) / Total headcount for the manager. For more information, see: How DBI for HRMS Calculates Headcount, page 1-3. The report also displays the total headcount pie chart.

The Not Rated column displays the percentage of employee assignments that do not have a performance rating or assignments that have a performance rating that is not mapped to a band, or assignments that have a performance rating that occurred before the start of the reporting period.

The report also displays one row for the total performance band for the direct reports who have no subordinates.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12

- Country, page 1-14
- Job Function, page 1-14
- Job Family, page 1-14
- Length of Service Band, page 1-15
- View By:
 - Country, page 1-17
 - Job Function, page 1-17
 - Job Family, page 1-17
 - Length of Service Band, page 1-18
 - Manager, page 1-18

Calculations

This report uses the following calculations:

- Manager, page Glossary-18
- Headcount (High, Mid, Low, Not Rated), Headcount Ratio and Total Headcount, page 1-3

Reports and Links

You can access Employee Detail report, page 1-36 available from the Headcount (High, Mid, Low, and Not Rated), and Direct Report column values.

Headcount Ratio by Length of Service Trend

The Headcount Ratio by Length of Service Trend report displays the headcount change over time by length of service for the selected manager. The application counts the length of service as the period between the hire date and the end date for a person and not the period of different assignments that the person holds.

The Headcount Ratio graph displays the headcount ratio percentage for each length of service. The application calculates the headcount ratio as: (Headcount for the Manager/Length of Service) / Total Headcount for the Manager.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- View By - Time, page 1-18

Calculations

This report uses the following calculations:

- Length of Service, page 1-7

Reports and Links

You can access the next level of report for the Rolling Date Hierarchy from the Time column values.

Headcount Ratio with Length of Service Status

The Headcount Ratio with Length of Service report displays the total headcount ratio for different periods of service of direct reports of the selected manager.

The Headcount Ratio graph displays the percentage headcount ratio for each manager. The list of managers includes the employees who report directly to the manager defined by the parameter and who have a total headcount greater than zero. You can also view the Headcount pie chart that displays the total headcount of the employees.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12
- Country, page 1-14
- Job Function, page 1-14
- Job Family, page 1-14
- Performance Band, page 1-16
- View By:
 - Country, page 1-17
 - Job Function, page 1-17
 - Job Family, page 1-17
 - Manager, page 1-18
 - Performance Band, page 1-18

Calculations

This report uses the following calculations:

- Headcount, page 1-3
- Length of Service, page 1-7

Reports and Links

You can access Employee Detail report , page 1-36 available from the Headcount (Length of Service) and Direct Report column values.

Headcount Budget Trend

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

The report displays the total actual and budgeted headcount for all subordinates of the manager. 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. For information on creating control budgets, see: *Defining Budget Characteristics, Oracle HRMS Enterprise and Workforce Management Guide*

For information on implementing budgets, see: *Human Resource Budgets, Oracle HRMS Implementation Guide*

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13

Calculations

There are no calculations in this report.

HR Management - Turnover

HR Management - Turnover

The HR Management - Turnover dashboard displays Daily Business Intelligence reports for Oracle HRMS and provides a high-level summary of Human Resource measurements for the employee turnover in your enterprise. To use this dashboard you require the HR Line Manager or the Daily HR Intelligence responsibility.

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

Parameters

The HR Management - Turnover dashboard uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Currency, page 1-13

Key Performance Indicators (KPIs)

The HR Management Turnover dashboard contains KPIs that display the turnover of staff at different performance levels for a given date with a percentage change within the selected period. You can view the analytical data for the manager selected in the dashboard parameter using the following KPIs:

- Total Headcount: calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy. You can access the Headcount Activity by Manager Status report, page 1-26 from this KPI.
 - Average Years of Service: calculates the average length of service for all current employees in the manager's hierarchy.
- Total Annualized Turnover: calculates the total annualized turnover in the reporting period for all employee assignments in the manager's hierarchy. You can access the Turnover Summary Status report, page 1-49 from this KPI.
 - Annualized Voluntary Turnover calculates the total voluntary annualized turnover in the reporting period for all employee assignments in the manager's hierarchy.
 - Annualized Involuntary Turnover calculates the involuntary annualized turnover in the reporting period for all employee assignments in the manager's hierarchy.
- Total Terminations: calculates the total terminations based on the reporting period for all employee assignments in the manager's hierarchy. You can access the Turnover Ratio with Performance Band Status, page 1-51 from this KPI.
 - High, Mid, and Low Performers and Not Rated: calculate the turnover based on the reporting period for all employee assignments in the manager's hierarchy that are associated with a high, mid, and low performance band. The Not Rated KPI counts the turnover of employees not associated with any performance

band. The application uses the most recent rating before the termination date for the KPI calculation. You can access the Turnover Ratio with Performance Band Status report, page 1-51 from these KPIs.

- Average Years of Service: calculates the average length of service for all employees in the manager's hierarchy that separated during the reporting period.

For information on KPI calculations, see: How DBI for HRMS Derives Report Values, page 1-3

Turnover Summary Status

The Turnover Summary Status report displays the voluntary annualized turnover, involuntary annualized turnover, and the total annualized turnover based on the reporting period for all employee assignments in the manager's hierarchy. This report calculates the start and end headcount based on the effective date and reporting period for all employee assignments in the manager's hierarchy. The application calculates Start Headcount as: Effective Date – Reporting Period. See: How DBI for HRMS Calculates Headcount, page 1-3

The Annualized Turnover graph displays the voluntary and the involuntary change percentage for the employees of the selected manager. The Terminations graph displays the voluntary and involuntary terminations for the employees of the selected manager.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Country, page 1-14
- Job Function, page 1-14
- Job Family, page 1-14
- Length of Service Band, page 1-15
- Performance Band, page 1-16
- View By:
 - Country, page 1-17
 - Job Function, page 1-17
 - Job Family, page 1-17
 - Length of Service Band, page 1-18
 - Manager, page 1-18
 - Performance Band, page 1-18

Calculations

This report uses the following calculations:

- Headcount, page 1-3
- Termination, page 1-5
- Annualized Turnover, page 1-6

Reports and Links

You can access the following reports from the links in this report:

- Turnover Summary Status (for a specific manager) available from the Manager column values.
- Turnover Detail report, page 1-40 available from the Terminations (Voluntary), Terminations (Involuntary), and Terminations (Total) column values.
- Employee Detail report , page 1-36 available from Direct Reports.
- Drill/Pivot reports: Depending on the parameters you select, these reports include the details about countries, job functions, job families, performance bands, or the length of service bands in which the manager has a headcount. For further information, see: Drill and Pivot in *Oracle E-Business Intelligence Daily Business Intelligence User Guide*.

Annualized Turnover for Top 10 Countries

The Annualized Turnover for Top 10 Countries report displays the total annualized turnover, voluntary annualized turnover, and the involuntary annualized turnover for the top ten countries with the highest headcount for the selected manager. The report includes only the countries that have non-zero headcount at the effective date or if they have terminations in the reporting period. The report will display the top 10 countries by headcount. If there are more than 10 countries, the report groups them in the Other column.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12
- View By - Time, page 1-18

Calculations

This report uses the following calculations:

- Country: The employee's country based on the assignment location.
- Turnover, page 1-6

Annualized Turnover for Top 4 Countries

The Annualized Turnover for Top 4 Countries report displays the changes over time in the annualized turnover for the top four countries at the selected date.

The Annualized Turnover graph shows the annualized turnover over time for all terminations of the selected manager for each of the top four countries. Terminations that are not associated with a country are included in the Unassigned column. The report displays the Unassigned column if it is in the top four by headcount.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12
- View By - Time, page 1-18

Turnover Ratio by Performance Band Trend

The Turnover Ratio by Performance Band report displays the changes over time in the employee turnover for different performance bands for the selected manager.

The Turnover ratio graph displays the termination headcount for a number of date points in time for employee assignments for the selected manager. The report uses the most recent rating before the termination date to calculate the turnover ratio.

The Not Rated column includes the employee assignments that do not have a performance rating or the assignments that are not mapped to a performance band.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- View By - Time, page 1-18

Reports and Links

You can access the following reports from the links in this report:

- Drill Reports available from the Time column values.

Turnover Ratio with Performance Band Status

Use the Turnover Ratio with Performance Band Status report to investigate changes in employee turnover within each performance band. 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 uses the most recent performance rating before the termination date.

The Terminations with Performance Bands graph displays the total terminations in the performance bands for the employees. The Termination Ratio with Performance Bands graph displays the percentage ratio of terminations for each of the employees in the selected manager's hierarchy. You can also view the Total Terminations pie chart.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12
- Country, page 1-14
- Job Function, page 1-14
- Job Family, page 1-14
- Length of Service Band, page 1-15
- View By:
 - Country, page 1-17
 - Job Function, page 1-17
 - Job Family, page 1-17
 - Length of Service Band, page 1-18
 - Manager, page 1-18

Calculations

This report uses the following calculations:

- Termination (Performance Bands and Not Rated) and Total Terminations, page 1-5

Reports and Links

You can access the following reports from the links in this report:

- Turnover Ratio with Performance Band Status report for a specific manager from the Manager column values.
- Turnover Detail report, page 1-40 available from the Terminations column values.
- Employee Detail report , page 1-36 available from Direct Reports.
- Drill/Pivot reports: Depending on the parameter that you select, you can view the drill reports that include details about the country, job function, job family, and length of service band for which the manager has a headcount. For further information, see: Drill and Pivot in *Oracle E-Business Intelligence Daily Business Intelligence User Guide*.

Terminations with Length of Service Status

The Terminations with Length of Service Status report shows the ratio of terminations for different lengths of service for the selected manager. The list of managers includes the employees who report directly to the manager defined by the parameter and who have a total headcount greater than zero or who have a zero headcount with some activity in the reporting period such as terminations.

The Terminations with Length of Service graph displays the total terminations for each manager. The application calculates the total terminations based on the reporting period for all employee assignments in the manager's hierarchy and where the employee's length of service falls within the length of service band. The Termination Ratio with Length of Service graph displays the percentage of terminations for each manager. The application calculates the percentage as: $(\text{Total termination for a particular period of service band} / \text{Total termination headcount across all period of service bands on a particular row}) * 100$. You can also view the Total Terminations pie chart.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Country, page 1-14
- Job Function, page 1-14
- Job Family, page 1-14
- Performance Band, page 1-16
- View By:
 - Country, page 1-17
 - Job Function, page 1-17
 - Job Family, page 1-17
 - Manager, page 1-18
 - Performance Band, page 1-18

Calculations

This report uses the following calculations:

- Length of Service (Amount and Ratio) , page 1-7
- Total Terminations, page 1-5

Reports and Links

You can access the following reports from the links in this report:

- Terminations with Length of Service Status (for a specific manager): available from the Manager column values.

- Turnover Details report, page 1-40 available from the Amount column values of the different length of service bands.
- Employee Detail report , page 1-36 available from Direct Reports.
- Drill/Pivot reports: Depending on the parameter that you select, you can view the drill reports that include details about countries, job functions, job families, and performance bands, for which the manager has a headcount. For further information, see: Drill and Pivot in *Oracle E-Business Intelligence Daily Business Intelligence User Guide*.

Voluntary Terminations for Top 5 Reasons

The Voluntary Terminations for Top 5 Reasons report displays the top five leaving reasons for the total voluntary terminations for the selected manager. The Terminations graph shows the total terminations based on the reporting period for all employee assignments in the selected manager's hierarchy. The Terminations Change Percent graph shows the change percentage calculated as: Total Terminations in the Current Period – Total Terminations in the Prior Period. The Other segment includes the reasons that are not in the top five range.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12
- View By - Leaving Reason, page 1-18

Calculations

This report uses the following calculations:

- Termination, page 1-5

Reports and Links

- Turnover Detail report, page 1-40 available from the Terminations column values and the pie chart segments.

Terminations for Top 5 Job Functions

The Terminations for Top 5 Job Functions report displays total employee terminations for each of the top five job functions in the selected manager's hierarchy. The job functions are ranked by headcount as at the effective date. The total terminations are calculated for all assignment reports to the manager in the hierarchy, and for each of the top five job functions if the job is defined in the job function. The Other segment includes the job functions that are not in the top five range.

The Unassigned row includes the assignments that are not associated with a job function. The report shows the unassigned termination information if it is in the top five terminations.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Manager, page 1-12
- Currency, page 1-13
- Staff, page 1-16
- Separation Category, page 1-17
- View By - Job Function, page 1-17

Calculations

This report uses the following calculations:

- Termination, page 1-5

Reports and Links

You can access Turnover Detail report, page 1-40 available from the pie chart segments and the Terminations values.

Termination Status

The Termination Status report displays the total terminations based on the reporting period for all employee assignments in the manager's hierarchy. The Terminations graph shows the total terminations based on the reporting period for all employee assignments in the selected manager's hierarchy. The Terminations Change Percent graph shows the change percentage calculated as: Total Terminations in the Current Period – Total Terminations in the Prior Period.

Parameters

This report uses the following parameters:

- Effective Date, page 1-9
- Period, page 1-9
- Compare To, page 1-11
- Manager, page 1-12
- Country, page 1-14
- Job Function, page 1-14
- Job Family, page 1-14
- Length of Service Band, page 1-15
- Performance Band, page 1-16
- Termination Category, page 1-17
- Leaving Reason, page 1-15

- View By, page 1-17
 - Manager, page 1-18
 - Country, page 1-17
 - Job Function, page 1-17
 - Job Family, page 1-17
 - Performance Band, page 1-18
 - Length of Service Band, page 1-18
 - Leaving Reason, page 1-18

Calculations

This report uses the following calculations:

- Manager, page Glossary-18
- Termination, page 1-5

Reports and Links

You can access the following reports from the links in this report:

- Turnover Detail report, page 1-40 available from the Amount column values.
- Drill/Pivot reports: Depending on the parameter that you select, you can view the drill reports that include details about the country, job function, job family, performance band, length of service band, termination category, and leaving reason for which the manager has a headcount. For further information, see: Drill and Pivot in *Oracle E-Business Intelligence Daily Business Intelligence User Guide*.

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-23

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.

Active Employee

DBI for HRMS counts an employee, page Glossary-12 as active if they have a current period of service, page Glossary-9 at the effective date, page Glossary-11

If an employee is suspended, DBI for HRMS still counts them as active.

DBI for HRMS also uses the term Incumbent to refer to an active employee.

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

An applicant is a person who submits an application for employment to an organization.

Applicability

In HRMS budgeting, a term describing whether a budget reallocation rule pertains to donors or receivers.

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-9

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-24

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-23

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-23

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-12

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-25, *Field*, page Glossary-13

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 business group represents a country in which your enterprise operates. It enables you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

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.

Business Rule

See Configurable Business Rules, page Glossary-7

Cafeteria Benefits Plan

See: *Flexible Benefits Program*, page Glossary-13

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-26

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-12

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-31

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 Business Rule

In HRMS position control and budgeting, predefined routines (also called process rules) that run when you apply an online transaction, and validate proposed changes to positions, budgets, or assignments. You set their default status level (typically Warning) to Warning, Ignore, or Error.

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.

Current Period of Service

An employee's period of service is current if their most recent hire date is on or before the effective date, and either the employee does not have a termination date for their latest employment, or their termination date is later than the effective date.

The table below provides an example using an effective date of 12 October 2004:

Effective Date	Hire Date	Termination Date	Current Period of Service?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

Note: In Oracle HRMS an employee cannot transfer from one business group to another. To move from one business group to another, the business group they are leaving must terminate the employee, and the business group they are joining must re-hire the employee. Therefore the definition of period of service, above, does not take account of any service prior to the most recent business group transfer.

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-10, *Effective Date*, page Glossary-11

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-11

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.

Department

In DBI for HRMS, the term Department has the same meaning as Organization.

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-32

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-16

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-13

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-10

EIT

See: *Extra Information Type*, page Glossary-13

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-25, *Nonrecurring Elements*, page Glossary-19

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-29

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.

Employees have a system person type of Employee and one or more assignments with an assignment type of Employee.

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-25

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-25, *Field*, page Glossary-13

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-20

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-14

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.

Headcount Activity

DBI for HRMS uses this term to mean all the gains and losses occurring in a manager's hierarchy during a reporting period.

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.

Hire Date

When DBI for HRMS refers to Hire Date, it specifically means the employee's most recent hire date.

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.

Incumbent

See also: *Active Employee*, page Glossary-1

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.

Legal Entity

A legal entity represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate 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.

DBI for HRMS counts a person as a manager if they supervise assignments (directly or through subordinates) for which the total headcount value is greater than zero at the effective date.

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-25

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-14

Pay Value

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-15

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-23, *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 than 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.

Process Rule

See Configurable Business Rules, page Glossary-7

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-21, *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-20

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-29

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 Ministère du Revenu du Québec, 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-23

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-19, *Standard Link*, page Glossary-29

Referenced Rule

In HRMS budgeting, any predefined configurable business rule in the Assignment Modification, Position Modification, or Budget Preparation Categories you use as the basis for defining a new rule.

See Configurable Business Rules, page Glossary-7

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-13

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-26

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-28, *User Profile Options*, page Glossary-31, *Request Groups*, page Glossary-26, *Security Groups*, page Glossary-26

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 Ministère du Revenu du Québec.

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-26, *Security Profile*, page Glossary-28, *User Profile Options*, page Glossary-31

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-26

Self Appraisal

Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

Separation Category

See also: *termination category*, page Glossary-30

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-29

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 Ministère du Revenu du Québec 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-29

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-25

Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1)

A Ministère du Revenu du Québec 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).

Student Employee

A student who is following a work-study program. Student employees have HRMS person records (of system type Employee) so that you can include them in your payroll.

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 Category

When employees leave an enterprise, the decision is either made by the employee or by the enterprise. When the decision is made by the employee the termination is Voluntary. When the decision is made by the enterprise, the termination is Involuntary.

DBI for HRMS uses a formula to determine which category each termination belongs to, based on the associated leaving reason.

HRMSi elsewhere refers to Termination Category as Separation Category.

Termination Date

DBI for HRMS uses this term to specifically refer to the employee's most recent termination date prior to the effective date.

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.

Transcendentive

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-26, *Security Profile*, page Glossary-28

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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