

Oracle® Human Resources Management Systems

Strategic Reporting (HRMSi) User Guide

Release 11*i*

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Primary Author: Jo Turner, Gowri Arur, Samuel Thomas

Contributing Author: Christopher Bridge, Justin Hyde, Jeff Titmas, Steve Sherlock

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Contents

Send Us Your Comments

Preface

1 Strategic Reporting (HRMSi) User Guide

Strategic Reporting Overview	1-1
What is Strategic Reporting?	1-3
Strategic Reporting Key Concepts	1-4
Workforce	1-5
HRMS Intelligence Key Performance Indicators	1-5
Frequency and Reporting Dates (HTML reports)	1-7
Chief HR Officer- Overview Dashboard	1-8
Chief HR Officer- Headcount Dashboard	1-9
Chief HR Officer- Turnover- Dashboard	1-10
HR Management - Overview Dashboard	1-11
HR Management - Headcount Dashboard	1-12
HR Management - Turnover Dashboard	1-13
Workforce Budget Management Dashboard	1-14
Open Enrollment Management Dashboard	1-15
Employee Absence Management Dashboard	1-16
How DBI for HRMS Derives Report Values	1-17
How DBI for HRMS Parameters Affect Reports.	1-26
Troubleshooting DBI for HRMS Reports.	1-38

2 Leave and Absence Management Intelligence

Leave and Absence Management Intelligence	2-1
Workforce Intelligence Key Concepts for Leave and Absence Management.	2-2
Absence Hours Report	2-3
Employee Absence Hours (Organization Hierarchy) Trend Analytics Workbook	2-3
Employee Hours Worked (Organization Hierarchy) Trend Analytics Workbook	2-5
Hours Worked Report	2-6
Employee Absence Trend	2-7
Absence Summary by Manager	2-7
Employee Absence Duration by Category	2-8
Absence Summary by Manager Status	2-8

Employee Absence Summary by Category Status	2-9
Employee Absence by Category Trend	2-10
Employee Absence Detail	2-11

3 Salary and Grade Related Pay and Progression Intelligence

Salary and Grade Related Pay and Progression Intelligence	3-1
Key Concepts for Salary, Grades, and Pay Administration Intelligence.	3-2
Average Salary By Group Report	3-3
Average Salary Trend Report	3-4
Salary and Grade Range Report	3-5
Salary Component Trend Report	3-5
Salary Spread Report	3-6
Employee Salary (Organization Hierarchy) Trend Analytics Workbook	3-7
Employee Salary Component (Organization Hierarchy) Trend Analytics Workbook	3-9
Employee Salary and Grade Range (Organization Hierarchy) Detail Analytics Workbook	3-11
Employee Salary by Group (Organization Hierarchy) Status Analytics Workbook.	3-14
Employee Salary by Job and Grade Status Workbook	3-15
Employee Salary Spread (Organization Hierarchy) Detail Analytics Workbook	3-17
Salary Survey Comparison Workbook.	3-19
Salary Distribution Within Grade Range KPI PMV Report	3-19
Salary to Grade Mid Point Variance Status KPI PMV Report	3-20
HRI Salaries Varying From Grade Mid Point KPI	3-20
HRI Workforce Assignment Count Above Grade Mid Point KPI	3-20
HRI Workforce Assignment Count Below Grade Mid Point KPI	3-20
Employee Detail	3-21
Employee Headcount and Salary Trend	3-22
Headcount and Salary Top 10 Countries.	3-22
Salary by Manager Status	3-23
Salary by Job Function Status	3-25
Salary by Job Family Status	3-26
Average Salary for Top 4 Countries Trend	3-27

4 Organization Structures Intelligence

Organization Structures Intelligence	4-1
Organization Workforce Report	4-2

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

Employment Agreements and Legal Compliance Intelligence (U.S.).	5-1
Employee Equal Opportunity by Job (United States Specific) Comparison Workbook	5-2

6 People, Budgets and Costing Intelligence

People, Budgets and Costing Intelligence	6-1
Key Concepts for People Budgets and Costing Intelligence.	6-2
Employee Budget Trend Workbook	6-2

Employee Budget Status Workbook.	6-3
Employee Budget Trend Report	6-5
Organization Budget (Employee) Status Report	6-6
Employee Headcount Budget Trend Report	6-7
Labor Cost Distribution by Organization	6-8
Labor Cost Distribution by Position.	6-9
Labor Cost Distribution by Element.	6-9
Labor Cost Distribution by Funding Source	6-10
Workforce Occupancy Details	6-10
Labor Cost with Headcount	6-11
Headcount Distribution by Organization Report	6-11

7 Competencies, Qualifications, and Development Intelligence

Competencies, Qualifications, and Development Intelligence	7-1
Key Concepts for Competencies, Qualifications, and Development Intelligence.	7-2
Competence Levels (Organization Hierarchy) Detail Analytics Workbook	7-2
Competence Match (Organization Hierarchy) Status Analytics Workbook	7-4
Competence Levels Report	7-9
Group Competencies Report.	7-9
Individual Competencies Report	7-11

8 People Management Intelligence

People Management Intelligence	8-1
Key Concepts for People Management Intelligence	8-2
Workforce Count (Organization Hierarchy) Trend Analytics Workbook	8-5
Workforce Count Change (Organization Hierarchy) Status Analytics Workbook	8-6
Workforce Separation by Competence (Organization Hierarchy) Status Analytics Workbook	8-8
Workforce Separation by Competence (Organization Hierarchy) Trend Analytics Workbook	8-10
Workforce Separation by Length of Work (Organization Hierarchy) Status Analytics Workbook.	8-12
Workforce Separation by Length of Work (Organization Hierarchy) Trend Analytics Workbook.	8-13
Workforce Separation by Reason (Organization Hierarchy) Status Analytics Workbook	8-14
Workforce Separation by Reason (Organization Hierarchy) Trend Analytics Workbook	8-16
Workforce Separation (Organization Hierarchy) Template Analytics Workbook.	8-17
Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics Workbook.	8-20
Workforce Count by Job Category (Organization Hierarchy) Trend Analytics Workbook.	8-22
Workforce Count (Organization Hierarchy) Template Analytics Workbook	8-23
Workforce Gain (Organization Hierarchy) Status Analytics Workbook.	8-25
Workforce Gain (Organization Hierarchy) Trend Analytics Workbook.	8-26
Workforce Gain (Organization Hierarchy) Template Analytics Workbook	8-28
Workforce Loss (Organization Hierarchy) Status Analytics Workbook.	8-31
Workforce Loss (Organization Hierarchy) Trend Analytics Workbook	8-32
Workforce Loss (Organization Hierarchy) Template Analytics Workbook	8-34

Employee Movement by Organization Analysis Workbook	8-37
Employee Primary Assignment Count (by Location and Employment Category) Comparison Workbook	8-39
Employee Primary Assignment Count (by Organization and Employment Category) Comparison Workbook	8-41
Workforce Assignment Activity Analysis Workbook (EDW)	8-43
Workforce Composition Analysis Workbook (EDW)	8-45
Workforce Planning Summary Analysis Workbook (EDW).	8-47
Workforce Separation Analysis Workbook (EDW)	8-51
Employee Count KPI Status PMV Report	8-55
HRI Employee Count Status KPI	8-55
Employee Count with Job Category KPI Status PMV Report	8-56
HRI Employee Count with Job Category Status KPI.	8-57
Employee Separation KPI Status PMV Report	8-58
HRI Employee Separation Status KPI	8-58
Workforce Separation by Rolling Month – Status KPI PMV Report	8-59
HRI Workforce Separation Full Time Equivalent by Rolling Month KPI	8-60
HRI Workforce Separation Headcount by Rolling Month KPI	8-60
Employee Separation with Job Category KPI Status PMV Report	8-61
HRI Employee Separation with Job Category Status KPI.	8-62
Workforce Count KPI Status PMV Report	8-63
HRI Workforce Headcount KPI	8-63
Workforce Count Status (Job Category) KPI PMV Report	8-64
HRI Workforce Full Time Equivalent (Job Category) KPI	8-64
HRI Workforce Head Count (Job Category) KPI	8-65
Separations By Competency Report.	8-66
Separations By Leaving Reason Report	8-67
Separations By Service Bands Report	8-67
Separations Trend Reports.	8-68
Workforce Comparison Report.	8-68
Workforce Gains Report.	8-69
Workforce Losses Report	8-70
Workforce Ratio Report	8-71
Workforce Summary Analysis Report	8-72
Organization Separation Report	8-73
Annualized Employee Turnover by Manager Status.	8-74
Annualized Turnover for Top 4 Countries	8-75
Annualized Turnover for Top 10 Countries	8-76
Annualized Employee Turnover Report	8-76
Annualized Employee Turnover Trend	8-77
Employee Activity by Manager Status.	8-78
Employees for Top 4 Countries Trend	8-80
Employee Hire Detail	8-80
Employee Ratio by Length of Service Trend	8-81
Employee Ratio by Performance Band Trend	8-81
Employee Ratio with Length of Service Status	8-82

Employee Ratio with Performance Band Status	8-83
Employee Transfer (Minus) Detail	8-84
Employee Transfer (Plus) Detail	8-85
Employee Termination Detail	8-86
Employee Summary Status	8-87
Employee Termination Status	8-88
Employee Terminations by Job Functions	8-89
Employee Terminations with Length of Service Status.	8-90
Employee Turnover Detail.	8-91
Employee Turnover Ratio by Performance Band Trend	8-92
Employee Turnover Ratio with Performance Band Status	8-93
Employee Turnover Summary Status	8-94
Employee Voluntary Terminations	8-95
HR Staff Ratio by Country.	8-96
HR Ratio Detail	8-96
Contingent Worker Trend	8-97
Contingent Worker Activity by Manager Status	8-98
Contingent Worker Ratio with Length of Placement Status.	8-99
Length of Placement Trend	8-100
Length of Placement Ratio Trend	8-101
Worker Detail	8-101
Contingent Worker Detail by Placement End.	8-102
Contingent Worker Placement Detail	8-103
Contingent Worker End Placement Detail	8-104
Contingent Worker Transfer (Minus) Detail	8-105
Contingent Worker Transfer (Plus) Detail	8-106
Workforce Activity by Manager Status	8-106
Staff Transfer (Minus) Detail	8-108
Staff Transfer (Plus) Detail.	8-109
Workforce Ratio Trend	8-110

9 Recruiting and Hiring Intelligence

Recruiting and Hiring Intelligence	9-1
Key Concepts for Recruiting and Hiring Intelligence	9-2
Applicant Time to Start Comparison Workbook	9-4
Application Termination Analysis Workbook	9-5
Applications Analysis Workbook.	9-5
Recruitment Efficiency Analysis Workbook	9-7
Vacancy Hire Success (Organization Hierarchy) Status Analytics workbook	9-9
Vacancy Hire Success (Organization Hierarchy) Trend Analytics Workbook	9-11
Vacancy Hire Success (Organization Hierarchy) Template Analytics Workbook.	9-13
Recruitment by Authorizer Analysis Workbook (EDW)	9-15
Recruitment by Recruiter Analysis Workbook (EDW)	9-19
Workforce Recruitment Stage Analysis Workbook (EDW)	9-22
Recruitment Success (Hires) KPI Status PMV Report	9-28

HRI Recruitment Success (Starts) Status KPI	9-29
Recruitment Success (Hires) with Job Category KPI Status PMV Report	9-30
HRI Recruitment Success (Starts) with Job Category Status KPI.	9-30
Recruitment Success Report	9-31

10 Learning Management Intelligence

Learning Management Intelligence	10-1
Workforce Intelligence for Learning Management Overview	10-2
Training Class Ranking Status Workbook	10-3
Student Training Success (External Students) Analysis Workbook.	10-5
Student Training Success (Internal Students) Analysis Workbook	10-6
Training Cost and Revenue Analysis Workbook	10-9
Training Course Ranking by Amount Status Workbook	10-14
Training Success Workbook	10-16
Employee Training Attendance Success (Organization Hierarchy) Status Analytics Workbook.	10-21
Employee Training Attendance Success (Organization Hierarchy) Trend Analytics Workbook.	10-22
Employee Training Attendance Success (Organization Hierarchy) Template Analytics Workbook.	10-23
Training Attendance KPI Status PMV Report.	10-26
HRI Training Attendance Status KPI	10-26
Training Attendance with Job Category KPI Status PMV Report	10-27
HRI Training Attendance with Job Category Status KPI	10-28
Training Classes by Competence Report.	10-28
Training Success Report	10-29

HRMS Glossary

Index

Send Us Your Comments

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

Part No. B14375-02

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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- Did you understand the context of the procedures?
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Preface

Intended Audience

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

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

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

If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University

- Oracle Self-Service Web Applications.

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

- The Oracle Applications graphical user interface.

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

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

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

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Structure

- 1 Strategic Reporting (HRMSi) User Guide
 - 2 Leave and Absence Management Intelligence
 - 3 Salary and Grade Related Pay and Progression Intelligence
 - 4 Organization Structures Intelligence
 - 5 Employment Agreements and Legal Compliance Intelligence (U.S.)
 - 6 People, Budgets and Costing Intelligence
 - 7 Competencies, Qualifications, and Development Intelligence
 - 8 People Management Intelligence
 - 9 Recruiting and Hiring Intelligence
 - 10 Learning Management Intelligence
- HRMS Glossary

Related Information Sources

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

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

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

Guides Related to This Product

Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide

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

OA Personalization Framework and OA Extensibility Framework

Learn about the capabilities of the 5.6 Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

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

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

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

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

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

Oracle Human Resources Management Systems Deploy Self-Service Capability Guide

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

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

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

Implementing Oracle Approvals Management

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

Oracle iRecruitment Implementation Guide

Set up Oracle 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, Auto Patch, 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 11i.

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.

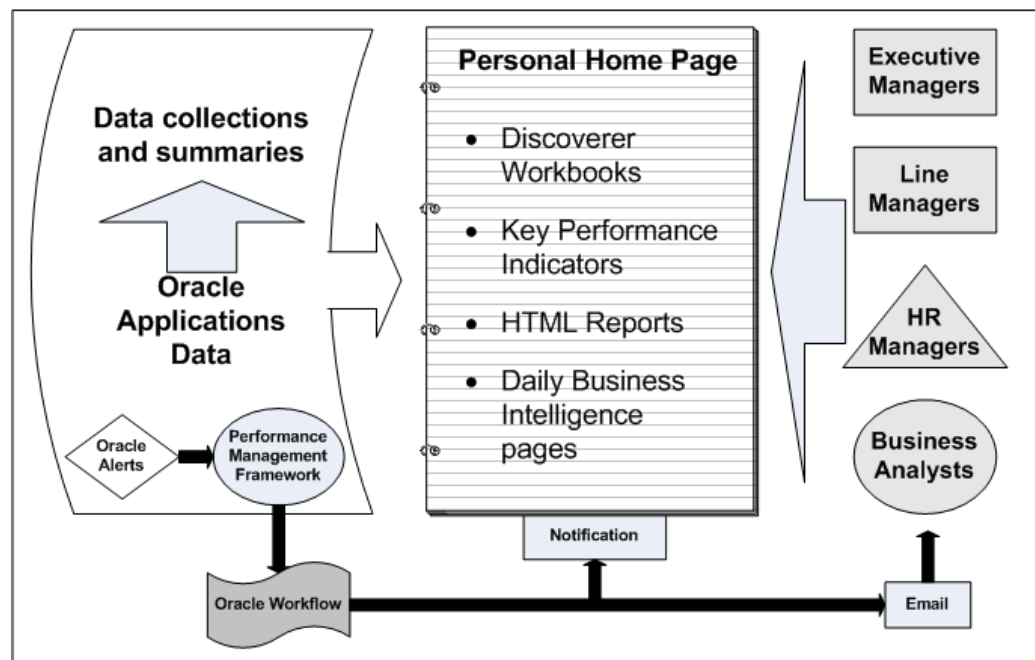
Strategic Reporting (HRMSi) User Guide

Strategic Reporting Overview

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

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

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



Each module is described in detail below. You can choose to implement all, or individual modules, depending on which modules best meet your enterprise reporting requirements.

Discoverer Workbooks and End User Layer (EUL)

HRMSi uses Oracle Discoverer to create workbooks containing worksheet reports and graphs. The workbooks access your application data through a Discoverer End User Layer that organizes your application data into business areas and folders.

The worksheets provide:

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

The workbooks are ready to use. However, you can amend any of the supplied workbooks to meet your individual enterprise requirements. You can also use Discoverer User to create your own workbooks, based on the HRMS Discoverer End User Layer (EUL).

For a list of the HRMS Discoverer EUL Business Areas, see Discoverer End User Layer Business Area Descriptions, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

You can find full instructions on developing the Discoverer EUL and creating and maintaining Discoverer workbooks in the *Oracle Discoverer Plus User's Guide* and the *Oracle Discoverer Plus Administrator's Guide*

Discoverer Analytics Reports

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

Some of the analytical structures are collected, and some are direct views of the HRMS transactional tables. This allows for near real-time reporting, with the advantage of collecting the more complex data that would otherwise impede the performance of the reports.

HRMSi also provides a set of analytical workbook templates based on the analytics summary structures so that you can extend the range of analytical reports as you wish. To develop reports using these templates, you need a good understanding of data warehouse structures.

HRMSi provides a set of business areas in the Discoverer End User Layer to support analytical reporting. For a list of the HRMSi Analytics Discoverer Business Areas, see Discoverer Analytics Business Areas, *Oracle HRMS Deploy Strategic Reporting (HRMSi)*

Performance Management Framework

The Performance Management Framework (PMF) is central to HRMSi and enables you to assess the performance of your enterprise against predefined targets using Key Performance Indicators (KPIs). The PMF contains forms to identify and store your KPI targets and tolerances, and can automatically generate alerts to notify you that actual values are outside your target tolerance levels. You can also create workflows to take action against these out of tolerance situations. The Performance Management Viewer (PMV) reports enable you to view KPI values and compare them with actual values. In the graph region you can display KPIs graphically to track your KPI trends.

Data Warehouse Module

The Data Warehouse module contains Discoverer workbooks that are based on Oracle Embedded Data Warehouse (EDW). HRMSi uses EDW to collect human resources data into a number of facts and dimensions (data warehouse structures). The facts are the actual data that you are interested in, such as salaries; the dimensions divide the facts into areas of interest, for example the salary budget per organization, or per job.

The data in the facts and dimensions is structured to more closely match reporting requirements, which improves report performance. The data is not real-time, but only current for the last collection date. You collect the data into the facts and dimensions using load and collection programs. You then determine how often you need to re-collect the data.

HTML reports

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

Daily Business Intelligence for HRMS

Daily Business Intelligence (DBI) for HRMS provides high level summary reports tailored for managers. DBI presents the HRMS reports as tables and graphs in the HR Management HTML page. The tables and graphs summarize the HRMS data using materialized views and base summary tables. HRMSi provides request sets containing programs to load your data into the summary structures. You can refresh the data daily to keep it up to date.

For a description of all DBI for HRMS reports see: *Oracle E-Business Intelligence Daily Business Intelligence User Guide* on Metalink.

To make DBI available to your users, you must first set up Daily Business Intelligence. See: *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* on Metalink.

Other product groups, such as Financials, create pages with reports relevant to their products.

What is Strategic Reporting?

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

What does Strategic Reporting mean?

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

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

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

- *Are my different types of workers balanced to meet my business objectives?*

- *Do salaries correlate with other factors, such as age or service?*
- *How successful is my recruitment and what is the trend?*
- *What competencies do my employees hold, and what competencies do they require?*

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

How does strategic reporting differ from standard workforce intelligence?

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

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

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

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

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

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

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

Strategic Reporting Key Concepts

Workforce

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

HRMS Intelligence Key Performance Indicators

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

Performance Management Framework

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

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

Salary and Grade Related Pay and Progression

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

Learning Management

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

People Management

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

Recruiting and Hiring

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

Use these KPIs to set target values for performance of your enterprise in these four areas. You can configure the performance management framework to send a notification

when actual performance falls short of, or exceeds, the target value. For example, you may configure the performance management framework to send you a notification when workforce variance is greater than 10%, or when training success is below 50%.

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

KPI Supporting Reports

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

The following table indicates which reports support which KPIs:

KPIs and Supporting Reports

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

KPI Targets

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

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

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

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

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

Frequency and Reporting Dates (HTML reports)

Many of the HTML reports include the following two fields:

- Frequency
- Reporting Dates

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

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

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

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

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

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

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

The report always includes the dates you enter in the parameters, even if these fall outside the frequency selected. For example, if you enter the reporting dates of

12-Jun-2001 and 20-Nov-2003, and the frequency of Year, the information for the report is taken from 01-Jun-2001 until 31-May-2004, as follows:

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

Chief HR Officer- Overview Dashboard

The Chief HR Officer - Overview dashboard displays Daily Business Intelligence reports for Oracle HRMS and provides an enterprise-level summary of workforce headcount, salary, and turnover information. To use this dashboard you require the Chief HR Officer responsibility.

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

Parameters

The Chief HR Officer - Overview dashboard uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

Key Performance Indicators (KPIs)

The Chief HR Officer - 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, in the selected period. You can view the analytical data for the manager selected in the dashboard parameter using the following KPIs:

- Employees: calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy. You can access the Employee Activity by Manager Status report, page 8-78 from this KPI.
 - Average Years of Service: calculates the average length of service for all current employees in the manager's hierarchy.
- Total Salary: calculates the total annualized salary at the effective date for all employee assignments in the manager's hierarchy. You can access the Employee Summary Status report, page 8-87 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 Employee Turnover Summary Status report, page 8-94 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.
- Total Terminations: calculates the total terminations based on the reporting period for all employee assignments in the manager's hierarchy. You can access the Employee Turnover Ratio with Performance Band Status, page 8-93 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 Employee Turnover Ratio with Performance Band Status, page 8-93 from these KPIs.
- Total HR Staff Ratio (1:N): calculates the average headcount ratio of HR personnel in relation to workers in the enterprise. DBI for HRMS includes both employees and contingent workers when it calculates this KPI. You can access the HR Staff Ratio by Country report , page 8-96 from this KPI.

Note: This KPI is an enterprise level view KPI and displays information only for the person specified in the HRI: DBI Chief HR Officer Named User profile option . The KPI value does not change if you select different managers.

For information on KPI calculations, see: How DBI for HRMS Derives Report Values, page 1-17

Chief HR Officer- Headcount Dashboard

The Chief HR Officer- Headcount dashboard displays Daily Business Intelligence reports for Oracle HRMS and provides an enterprise-level view of employee headcount information by line manager, country, performance bands, and length of service. To use this dashboard you require the Chief HR Officer responsibility.

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

Parameters

The Chief HR Officer - Headcount dashboard uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

Key Performance Indicators (KPIs)

The Chief HR Officer Headcount dashboard contains new KPIs to enable you to see the number of high, mid, low, and not rated performers within your enterprise 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:

- **Employees:** calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy. You can access the Employee Activity by Manager Status report, page 8-78 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 enterprise 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 Employee Ratio with Performance Band Status report, page 8-83 from these KPIs.

For information on KPI calculations, see: How DBI for HRMS Derives Report Values, page 1-17

Chief HR Officer- Turnover- Dashboard

The Chief HR Officer - Turnover dashboard displays Daily Business Intelligence reports for Oracle HRMS and provides an enterprise-level summary of Human Resource measurements for the employee turnover in your enterprise. To use this dashboard you require the Chief HR Officer responsibility.

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

Parameters

The Chief HR Officer - Turnover dashboard uses the following parameters:

- **Effective Date,** page 1-30
- **Period,** page 1-33
- **Compare To,** page 1-28
- **Manager,** page 1-32
- **Currency,** page 1-29

Key Performance Indicators (KPIs)

The Chief HR Officer - 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:

- **Employees:** calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy. You can access the Employee Activity by Manager Status report, page 8-78 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 Employee Turnover Summary Status report, page 8-94 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 Employee Turnover Ratio with Performance Band Status report, page 8-93 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 Employee Turnover Ratio with Performance Band Status report, page 8-93 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 1-17

HR Management - Overview Dashboard

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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

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:

- **Employees:** calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy. You can access the Employee Activity by Manager Status report, page 8-78 from this KPI.
 - **Average Years of Service:** calculates the average length of service for all current employees in the manager's hierarchy.
- **Total Salary:** calculates the total annualized salary at the effective date for all employee assignments in the manager's hierarchy. You can access the Employee Summary Status report, page 8-87 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 Employee Turnover Summary Status report, page 8-94 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 1-17

HR Management - Headcount Dashboard

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 1-30
- **Period,** page 1-33
- **Compare To,** page 1-28
- **Manager,** page 1-32
- **Currency,** page 1-29

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:

- **Employees:** calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy. You can access the Employee Activity by Manager Status report, page 8-78 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 Employee Ratio with Performance Band Status report, page 8-83 from these KPIs.

For information on KPI calculations, see: How DBI for HRMS Derives Report Values, page 1-17

HR Management - Turnover Dashboard

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 1-30
- **Period,** page 1-33
- **Compare To,** page 1-28
- **Manager,** page 1-32
- **Currency,** page 1-29

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:

- **Employees:** calculates the total headcount at the effective date for all employee assignments in the manager's hierarchy. You can access the Employee Activity by Manager Status report, page 8-78 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 Employee Turnover Summary Status report, page 8-94 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 Employee Turnover Ratio with Performance Band Status report, page 8-93 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 Employee Turnover Ratio with Performance Band Status report , page 8-93 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 1-17

Workforce Budget Management Dashboard

The Workforce Budget Management dashboard provides a high-level summary of budget information for the enterprise, enabling organization and budget managers to make informed strategic decisions about personnel costs. If you have implemented HRMS Budgeting and Payroll, you can measure, monitor, and manage labor cost and headcount using the information the dashboard provides about budgeted, committed, actual, and available resources. The graphs, tables, and reports give you a date-effective view of:

- Budget status
- Budget trends
- Workforce occupancy details

You must have a Workforce Budget Manager responsibility to use the dashboard.

Dashboard Parameters

This dashboard uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

The dashboard displays budget information for the rolling period you choose from the Period list, not an HRMS budget period.

The budget dashboard's Manager list uses an organization manager hierarchy instead of the manager hierarchy typical of DBI for HRMS dashboards, adding an additional filter that displays and considers only those subordinate managers who own organizations.

Key Performance Indicators (KPIs)

The following KPIs provide analytical summary data for the selected manager's workforce budgets. Each KPI represents a total budget amount for the organizations the selected manager and subordinates own.

- **Budgeted Labor Cost:** calculates the estimated cost of positions for the specified period.
- **Committed Labor Cost:** calculates the remaining amount budgeted organizations must spend on labor cost during the specified period. For periods where you have completed all payroll runs, committed labor cost is zero.
- **Actual Labor Cost:** calculates the amount organizations have spent on labor cost during the specified period. The calculation considers only costing data the application derives from payroll runs.
- **Available Labor Cost Budget:** calculates the amount remaining in the budget for the specified period. First the application adds committed and actual amounts to arrive at a projected amount, then subtracts projected from budgeted.
- **Budgeted Headcount:** calculates estimated headcount for the specified period.
- **Actual Headcount:** calculates headcount of employee primary assignments for the specified period. The calculation considers Assignment Budget Values, or data from a FastFormula you define.
- **Available Headcount Budget:** calculates the headcount remaining in the budget for the specified period. The calculation subtracts actual headcount from budgeted.

For information on KPI Calculations, see *How DBI for HRMS Derives Report Values*, page 1-17

For information on budgeting terminology, see *Control Budget Reports*, *Oracle HRMS Enterprise and Workforce Management Guide*

Open Enrollment Management Dashboard

The Open Enrollment Management dashboard displays Daily Business Intelligence reports for Oracle HRMS that provide a high-level summary of activity for your open enrollment period. In addition to viewing key performance indicators that track the number of participants who have enrolled during the period, you can navigate to reports that display life event information for participants, open action items, and employee participation by plan type, plan, or option in plan.

You must use the Benefits Manager responsibility to access this dashboard. To use the dashboard effectively, you need to understand the following concepts:

Dashboard Parameters

This dashboard uses the following parameters:

- Effective Date, page 1-30
- Program, page 1-35

Key Performance Indicators (KPIs)

The Open Enrollment Management dashboard provides KPIs that display a summary of open enrollment activity, including the number of eligible person's enrolled and not enrolled in the period. You can view the data for the selected program in the dashboard using the following KPIs:

- Number of Total Eligible Participants
- Number of Participants Who Have Made Elections
- Number of Participants Who Have Not Made Elections
- Number of Participants in Defaulted Elections

Employee Absence Management Dashboard

The Employee Absence Management dashboard provides a high-level summary of absence information in your organization.

The dashboard keeps you up-to-date on your employee absences and also provides analytical insights through trend charts and drill down reports enabling you to take informed decisions about employee absences.

Parameters

Use the following to narrow the reporting scope:

- Effective Date , page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32

Key Performance Indicators (KPIs)

The Employee Absence Management Dashboard provides analytical summaries of the following key performance indicators of employee absences for the selected manager:

- The total number of employees (headcount) reporting to the manager at the effective date. You can change the effective date using the Effective Date parameter. Drill down from the Employees KPI to the summary of the employee details.

See: How DBI for HRMS calculates the Employees., page 1-17

- The number of absences occurring in a period. You can change the period by choosing different values for the Effective Date and Period parameters. Drill down from the Absence Occurrence KPI to the absence summary by manager information.

See: How DBI for HRMS calculates the Absence Occurrences., page 1-25

- Total number of absences days or hours in the reporting period for the manager. You can change the period by choosing different values for the Effective Date and

Period parameters. Drill down from the Total Absence Duration KPI to the absence summary by manager information.

See: How DBI for HRMS calculates Total Absence Duration., page 1-25

- The average number of absence days or hours for each employee.
- The average number of absence days or hours for each absence occurrence.
- The average number of days of advance notifications the manager receives from employees. Drill down from the Average Notification Days KPI to the absence summary by manager information.
- See: How DBI for HRMS calculates Average Notification Days., page 1-26

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

DBI for HRMS reports on headcount, not number of workers. 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 and money. Normally (by default) secondary assignments have zero headcount.

Headcount is based on a worker's assignments. A worker, page Glossary-34 can have more than one assignment, each with a headcount of 1.

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

Note: If you delete a worker 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

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

Calculations that DBI for HRMS Performs on Headcount

The following headcount calculations appear in DBI for HRMS reports:

- **Total**

This is the total headcount of employee assignments.

- **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 Employee 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 Employee 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 Labor Cost

DBI reports labor cost by collecting HRMS budget, assignment, salary, and payroll data. If you implement HRMS Budgeting, you can compare budgeted, actual, committed, projected, and available amounts for labor cost in the currency of your choice. The Workforce Budget Management dashboard displays budget status information as of the effective date and period you choose, by correlating data about your selected manager and subordinates, the organizations they manage, and the budgets in effect at that point in time.

For information about HRMS Budgeting, see: *People Budgets and Costing Overview, Oracle HRMS Enterprise and Workforce Management Guide*

For information about budgeting terminology and calculations, see: *Control Budget Reports, Oracle HRMS Enterprise and Workforce Management Guide*

How DBI for HRMS Calculates Worker Transfers

A transfer occurs when a worker, page Glossary-34 assignment 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.

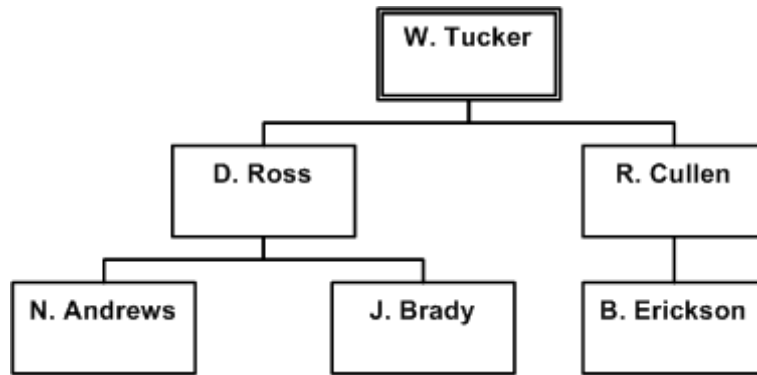
DBI counts transfers in and out of a manager hierarchy on the day the worker starts work for a new manager.

DBI for HRMS calculates an assignment transfer as one transfer out of the hierarchy of the worker's previous direct supervisor, and as one transfer into the hierarchy of the worker's current direct supervisor.

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

When calculating the total transfers into a manager's hierarchy, DBI for HRMS only counts assignments that have transferred from a different manager's hierarchy. Similarly, when calculating the total transfers out of a manager's hierarchy, DBI for HRMS only counts assignments that have transferred into a different manager's hierarchy.

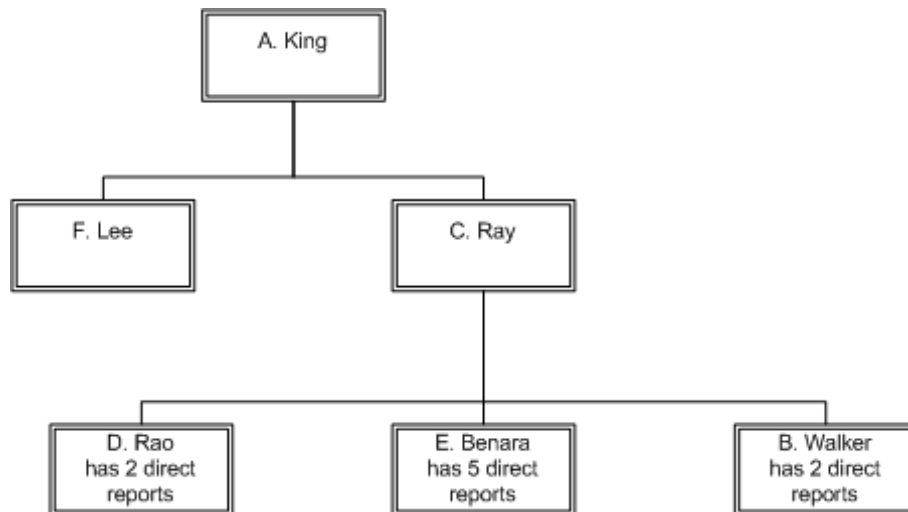
DBI for HRMS does not count transfers within a manager's hierarchy, since they are of no interest to that manager. For example:



A transfer of J. Brady's assignment 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.

If an worker's assignment transfers together with subordinate assignments, DBI for HRMS calculates the total number of transfers out of the hierarchy of the worker's previous immediate supervisor, and the total number of transfers into the hierarchy of the worker's current immediate supervisor.

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



If the assignment of manager E. Benara, with 5 direct reports, transfers from manager C. Ray 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. Ray's hierarchy. No workers 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 worker's return from a long-term absence as a transfer in.

Note: If an employee's primary and secondary assignments switch (the secondary assignment becomes the primary assignment and visa versa) and the two assignments have different managers, DBI for HRMS does not count the change of manager for the employee as a transfer, since the assignment has not transferred from one manager to another. See Discrepancies Between Start and End Headcount Values, page 1-41

When a manager is terminated, DBI for HRMS shows all the workers in the hierarchy either assigned or unassigned as transfers out.

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 all assignments on the associated person's hire date, page Glossary-16.

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 Contingent Worker Placements

DBI for HRMS counts contingent worker placements that occur within the reporting period. A Placement value represents the headcount of an assignment on the associated person's placement start date, page Glossary-24

Calculations that DBI for HRMS Performs on Contingent Worker Placements

DBI for HRMS performs the following calculations on placements:

- **Total**

This returns the sum of placements 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-32. 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 employee's headcount value on their 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 1-42

How DBI for HRMS Calculates Contingent Worker End Placements

A contingent worker's placement at the enterprise ends from the day after their end placement date, page Glossary-13. They are still employed on their termination date.

DBI for HRMS counts the contingent worker end placements that occur within the reporting period. A End Placement value represents the headcount of an assignment on the associated person's end placement date.

Calculations that DBI for HRMS Performs on End Placements

DBI for HRMS performs the following calculations on end placements:

- **Total**

This returns the sum of end placements that occur within the reporting period.

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 1-42

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 for Employees

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-16 to the effective date, page Glossary-12. 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-32.

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 Length of Placement for Contingent Workers

Several reports provide you with information about your contingent workers' length of placement.

For active contingent workers, page Glossary-2, DBI for HRMS calculates their length of placement from their placement start date, page Glossary-24 to the effective date, page Glossary-12. For contingent workers whose placement has ended before the effective date, DBI for HRMS calculates their length of placement from their latest placement date to their latest end placement date.

DBI for HRMS groups the length of placement values into Length of Placement Bands. A Length of Placement Band is a user-defined period that has default delivered bands. You will have several Length of Placement Bands for consecutive periods, for example < 3 months, 3-6 months, 6-12 months, 12-24 months, and <24 months.

The application includes the length of placement in the band, only if the placement date is earlier than the effective date and the end placement date (if any) is later than the start of the reporting period.

Calculations that DBI for HRMS Performs on Length of Placement

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

- **Total**

This returns the total headcount appearing within a Length of Placement band.

- **Average Months of Placement**

DBI for HRMS calculates the average months of placement as the total length of placement, divided by the number of contingent workers.

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 1-29, using the GL Daily Rates as at the effective date, page Glossary-12.

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 Calculates Initial Placement and Extension for Contingent Workers

DBI for HRMS calculates the initial placement as the length of time in months between a contingent worker's placement start date and the date of the first extension. The application calculates the extension period as the time from the date of the first extension to either the effective date for an active contingent worker or to the latest end placement date.

Calculations that DBI Performs on Initial Placement and Extension for Contingent Workers

The following example explains the initial placement and extension:

You create an assignment record for the contingent worker S.Smith on 14th May 2005, but do not enter a projected end date.

On 23rd May 2005 you update the projected end date to 31st October 2005.

On 18th September 2005, you again update the projected end to 31st Dec 2005.

DBI calculates the initial placement as the number of months between 14 May and 31st October. It performs the following calculations on extensions:

- If the effective date is later than 31 Dec, then the application calculates the extension period as the number of months between 1 Nov and 31 Dec.
- If the effective date is 30 Nov, then the application calculates extension period as the number of months between 1 Nov and 30 Nov.
- If the effective date is 30 Sep 2005, then the application calculates the initial placement period up to that date and there will be no extension.

The following initial placement and extension calculations appear in DBI for HRMS reports:

- **Total**

This returns the total (in average months) of initial placement and extension for contingent worker assignments within the reporting period.

- **Average** DBI for HRMS calculates the average months of initial placement and extension as the total length of initial placement and extension divided by the number of contingent workers.

How DBI for HRMS Calculates Absence

Absence, for DBI, is the total number of absences occurring in a reporting period. For absences without an end date, DBI considers that the absence ends after the reporting period. However, DBI sets the end date to the latest collection date for reporting purposes.

DBI attributes absences to the manager the employee reports to at the time of the absence. If an employee transfers to a different manager during absence, DBI counts the absence against both the managers.

A person can have more than one absence occurrence on the same day, such as personal leave in the morning and medical leave in the afternoon.

How DBI for HRMS Calculates Absence Duration

Absence duration is the working time lost in days or hours due to absence within a reporting period.

If an employee transfers from one manager to another during an absence, the absence duration is distributed appropriately between both the managers.

Average Absence Duration

DBI calculates the average absence duration by dividing the total absence duration by the number of absence occurrences in a reporting period.

Following is an illustration to calculate average absence duration.

Average Absence Duration Calculation: Example

Employee Name	Absence Category	Absence Duration in days
Andrew	Personal Leave	5
Andrew	Family Leave	3
John	Personal Leave	8
John	Medical Leave	10
Mary	Medical Leave	2

Total absence duration = 5+3+8+10+2=28 days

Absence Occurrences = 5

Average absence duration = 28/5 = 5.6 days

Average Employee Absence Duration

DBI calculates average employee absence duration by dividing the total absence duration by the number of employees reporting to the selected manager. You can set up DBI to use the employee headcount at the reporting period end date or the average of the headcount at the start and end of the period for the purposes of calculating the average employee absence duration. Use the profile option HRI: Workforce in Period Calculation Method to specify the headcount value to use.

Following is an illustration for calculating average employee absence duration.

Average Employee Absence Duration Calculation :Example

Employee Name	Absence Category	Absence Duration in days
Andrew	Personal Leave	5
Andrew	Family Leave	3
John	Personal Leave	8
John	Medical leave	10
Mary	Medical leave	2

Total absence duration = 5+3+8+10+2=28 days

Headcount = 3 (assuming that Andrew, John and Mary are the only members in the team and that each has a headcount of 1)

Average Employee Duration = 28/3 = 9.3 days

How DBI for HRMS Calculates the Average Notification Period

Notification period is the number of days between the absence request date and the absence start date.

If an employee transfers from one manager to another manager during an absence, DBI calculates the notification period for the absence once against each manager.

The average notification days is the total notification period divided by the number of absence occurrences within a reporting period for the selected manager.

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.

Absence Category

Use this parameter to restrict the report to one or more absence categories. All absences that do not have a defined absence type are displayed in the Unassigned column in the report. The selected absence categories affect all absence measures except the Employees column in the report.

Area

Use this parameter to report on employee activity in a geographic area. An area is a grouping of countries. For example, Europe could be an area that includes all the European countries. Global enterprises can use this feature for strategic reporting and to compare headcount and salaries across geographic areas.

This single-select optional parameter lists all areas recorded for your enterprise, plus a value of Unassigned. Reports only display information for the assignments of employees that match the selected area. If you select Unassigned, the reports display information for assignments that are not associated with any area.

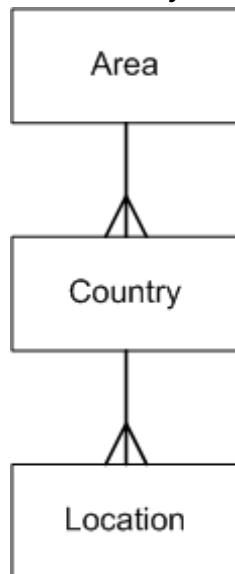
The default value for this parameter is All.

Understanding the Area Hierarchy

DBI for HRMS supports an Area hierarchy that consists of country and location. Your system administrator defines the areas.

Typically, one area is associated with a number of countries, and each country has number of assignment locations.

Area Hierarchy



For information on defining areas, see: Set Up Geography Dimension , *Daily Business Intelligence for HRMS Implementation Guide*

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>)

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.

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*.

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 1-33 parameters.

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

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 1-30

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.

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 1-30

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 1-36

Length of Placement Band

DBI for HRMS groups contingent workers' length of placement into user-defined Length of Placement Bands. Use this parameter to track the contingent workers length of placement.

This multi-select optional parameter lists all the Length of Placement Bands. Reports only display information for the assignments of contingent workers who have a length of placement 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 Placement*, page 1-22

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 multi-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 1-22

Manager

This parameter displays a list of managers, page Glossary-19 within your Manager hierarchy, page 1-33. 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 Employee 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 1-18

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 includes 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 1-38

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 1-23

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 1-30 and Compare To, page 1-28 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

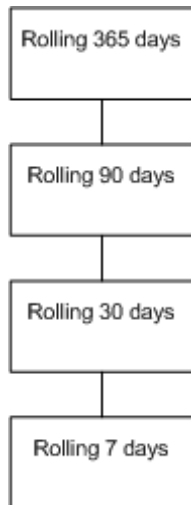
This parameter also determines the periods that the trend reports compare. Trend reports show you the change in values over several rolling periods, depending on which Period you select, as follows:

- **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 1-38

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.

Program

Use this single-select parameter to select which benefit programs you want to report on. For some reports, you can narrow the scope of the report further by selecting values in the Plan Type and Plan parameters. The default value for this parameter is All.

For an explanation of programs, plan types, and plans, see *Plan Design, Compensation and Benefits Management Guide*

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-32 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:

Area View By

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

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

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 1-30 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 1-30 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-19 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 1-33

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 1-33, 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.

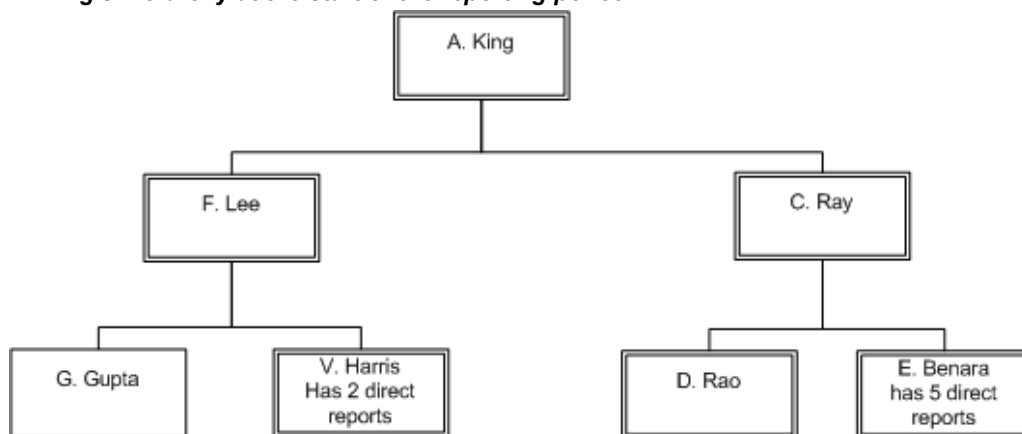
When the Hire, Termination, and Transfer Totals Don't Tally

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. Ray. F. Lee manages G. Gupta and V. Harris who has 2 direct reports. C. Ray manages D. Rao, and E. Benara, who has 5 direct reports.

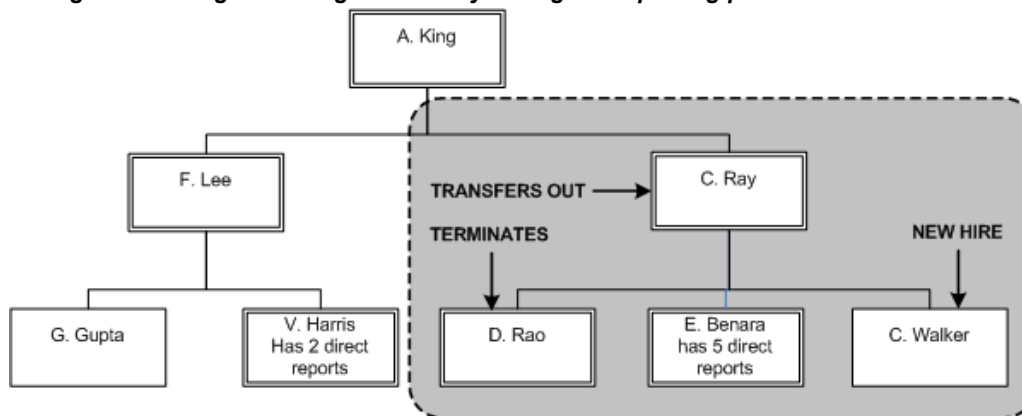
A. King's hierarchy at the start of the reporting period



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

- D. Rao separates from the enterprise.
- C. Ray hires C. Walker as a direct report.
- C. Ray 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. Ray, 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. Ray), 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. Ray 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.

Discrepancies Between Start and End Headcount Values

You may see a difference between the Start and End headcount values, with no corresponding change in hire, termination, or transfer values. This discrepancy can occur if an employee's primary and secondary assignments switch (the secondary assignment becomes the primary assignment and visa versa), and the two assignments have different managers. In this case, DBI for HRMS does not count the change of manager for the employee as a transfer, since the assignment has not transferred from one manager to another.

Take, for example, an employee who has a primary assignment for D. Ross, and a secondary assignment for R. Cullen. If the assignments switch so that the primary assignment is for R. Cullen and the secondary assignment is for D. Ross, the status change will affect headcount calculations. Assuming that the primary assignment has a headcount value of 1, and the secondary assignment a headcount of 0, D. Ross has lost one headcount, and R. Cullen has gained a headcount. The assignments have not transferred, so the switch does not affect the gain or loss figures.

The example above would affect the Headcount Activity by Manager report as follows, assuming no other headcount activity took place during the reporting period, and both managers started with a headcount of 6:

Manager	Start	Plus Hire	Plus Transfer	Minus Termination	Minus Transfer	End
D. Ross	6	0	0	0	0	5
R. Cullen	6	0	0	0	0	7

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.

Leave and Absence Management Intelligence

Leave and Absence Management Intelligence

Workforce Intelligence Key Concepts for Leave and Absence Management

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

- Absence Hours, page 2-2
- Working Hours, page 2-2

Absence Hours

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

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

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

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

A pre-defined formula, `TEMPLATE_BIS_DAYS_TO_HOURS`, calculates the absence hours. You can configure this formula to meet your requirements.

See: Discoverer Workbooks Implementation Steps, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

Working Hours

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

See: Setting Up and Customizing Working Hours, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

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

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

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

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

Absence Hours Report

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

Business Questions

What is the absence record over time?

Report Parameters

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

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

Related Topics

Absence Hours, page 2-2

Frequency and Reporting Dates (HTML reports), page 1-7

Employee Absence Hours (Organization Hierarchy) Trend Analytics Workbook

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

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

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

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

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

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

Business Question

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

Parameters

You must enter a value for the following parameters:

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

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

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

Worksheets

This workbook has the following worksheets:

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

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

Headings and Calculations

All worksheets contain the following columns:

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

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

Related Topics

Absence Hours, page 2-2

Employee Hours Worked (Organization Hierarchy) Trend Analytics Workbook

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

Business Questions

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

Parameters

You must enter a value for the following parameters:

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

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

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

Worksheets

This workbook has the following worksheet:

- By Payroll Period

The worksheet displays one row for each payroll period.

Headings and Calculations

The worksheet contains the following columns:

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

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

Related Topics

Working Hours, page 2-2

Hours Worked Report

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

Business Questions

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

Report Parameters

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

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

Related Topics

Working Hours, page 2-2

Employee Absence Trend

Use the Employee Absence Trend report to analyze the following trends in your organization:

- The average of the employee absence duration
- The sum of the working time lost due to absence

You can configure the report to display the duration values in days or hours. Use the HRI: Absence Duration Units profile option to control the unit of measurement for this report.

Parameters

Use the following to narrow the reporting scope:

- Effective Date , page 1-30
- Period, page 1-33
- Manager, page 1-32

Reports and Links

Click the links in the chart or the table to view the absence trends for a narrower period. You can change the detail level of the report by choosing a different period.

Related Topics

The Key Performance Indicators for Employee Absence Management Dashboard, page 1-16

Absence Summary by Manager

The Absence Summary by Manager report provides a summary of employee absences for the selected manager's group. You can view:

- The total number of employees reporting to the manager.
- The number of absences occurring over a period in a manager's group.
- The average number of days of advance notifications the manager receives from employees on their absence. You can also view the percentage change of average notification from the prior year or prior period. You select the period for comparison using the Compare To parameter.
- The sum of the duration of absences of all employees in days or hours and its percentage change with respect to the prior year or prior period.

You can configure the report to display the duration values in days or hours. Use the HRI: Absence Duration Units profile option to control the unit of measurement for this report.

Parameters

Use the following to narrow the reporting scope:

- Effective Date , page 1-30

- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32

Reports and Links

- Click a manager's name to view the summary of absences for that manager. See: Absence Summary by Manager Status, page 2-8
- Click Direct Reports in the Manager column to view the details of employees who reports directly to the manager. See: Employee Detail, page 3-21
- Click the Absences column value of the Direct Reports row to view the absence details of the directs reports. See: Employee Absence Detail, page 2-11

Related Topics

The Key Performance Indicators for Employee Absence Management Dashboard, page 1-16

Employee Absence Duration by Category

Use the Employee Absence Duration by Category report to analyze the percentage employee absence duration in the top five absences categories in your organization. The application determines the top five categories on the basis of the total absence duration under each category. All other categories appear in the Others slice of the pie chart.

Parameters

Use the following to narrow the reporting scope:

- Effective Date , page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32

Reports and Links

Click a category slice to drill down to the details of the employee absences in that category. See: Employee Absence Detail, page 2-11

Related Topics

The Key Performance Indicators for Employee Absence Management Dashboard, page 1-16

Absence Summary by Manager Status

The Absence Summary by Manager Status report complements the information in the Absence Summary by Manager report. The report helps you analyze:

- The average number of days or hours of advance notifications a manager receives from employees on their absences.
- The number of absences days each employee has taken.
- The change in percentage of each employee's absence duration compared to the prior reporting period. You select the period for comparison using the Compare To parameter.

Parameters

Use the following to narrow the reporting scope:

- Effective Date , page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32

You can configure the report to display the duration values in days or hours. Use the HRI: Absence Duration Units profile option to control the unit of measurement for this report.

Reports and Links

- Click a manager's name to view the summary of absences for that manager. See: Absence Summary by Manager Status, page 2-8
- Click Direct Reports in the Manager column to view the details of employees who reports directly to the manager. See: Employee Detail, page 3-21
- Click the Absences column value of the Direct Reports row to view the absence details of the directs reports. See: Employee Absence Detail, page 2-11

Employee Absence Summary by Category Status

Use the charts in the Employee Absence Summary by Category Status report to view the following:

- The average number of days or hours of advance notifications of absences received for each category.
- The number of days or hours each category contributes to the duration of absences.
- The percentage change in the duration of absences compared to the previous reporting period. You select the period for comparison using the Compare To parameter.

The table complements the charts and displays the following measures for each category:

- The number of employee absences.
- The average number of days or hours of advance notifications the manager receives from employees on their absence and the percentage change with respect to the prior reporting period.
- The sum of the duration of absences of all employees in days or hours and its percentage change with respect to the prior reporting period. The period for comparison depends on the value in the Compare To parameter.

You can configure the report to display the duration values in days or hours. Use the HRI: Absence Duration Units profile option to control the unit of measurement for this report.

Parameters

Use the following to narrow the reporting scope:

- Effective Date , page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32

Reports and Links

Click the Absence column value to view the absence details of the employees for a particular category. See: Employee Absence Detail, page 2-11

Employee Absence by Category Trend

Use the Employee Absence by Category Trend report to view the average of the absence days or hours for the top four categories across the reporting period in a graph. The application determines the top four categories on the basis of the total absence duration under each category.

The table provides details of the actual duration of absences for the top four categories across the reporting period. The application determines the top four categories on the basis of the total absence duration under each category.

You can configure the report to display the duration values in days or hours. Use the HRI: Absence Duration Units profile option to control the unit of measurement for this report.

Parameters

Use the following to narrow the reporting scope:

- Effective Date , page 1-30
- Period, page 1-33
- Manager, page 1-32

Reports and Links

Click the links in the chart or the table to view the absence trends by category for a narrower period. You can change the detail level of the report by choosing a different period.

Related Topics

The Key Performance Indicators for Employee Absence Management Dashboard, page 1-16

Employee Absence Detail

Use the Employee Absence Detail report to view the details of employee absences during the reporting period. Apart from the other details, you can also view the duration of the absence in the reporting period and the total duration of that absence occurrence.

You can configure the report to display the duration values in days or hours. Use the HRI: Absence Duration Units profile option to control the unit of measurement for this report.

Parameters

Use the following to narrow the reporting scope:

- Effective Date , page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Absence Category, page 1-27
- Staff, page 1-35

Reports and Links

Click an employee name or the manager name to view further details of the employee and their hierarchy through the employee self-service directory.

Related Topics

The Key Performance Indicators for Employee Absence Management Dashboard, page 1-16

Salary and Grade Related Pay and Progression Intelligence

Salary and Grade Related Pay and Progression Intelligence

Key Concepts for Salary, Grades, and Pay Administration Intelligence

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

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

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

- Salary Currencies, page 3-2
- Salary Annualization, page 3-2
- Grade Annualization, page 3-2
- Salaries and Assignments, page 3-2

Salary Currencies

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

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

Salary Annualization

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

Grade Annualization

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

Salaries and Assignments

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

- Be active or suspended.

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

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

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

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

- Average Salary Trend report
The report calculates the average salary on the last day of the frequency period. It calculates the average salary by totaling the salary for all relevant assignments, and dividing this value by the number of assignments.
- Salary Component Trend report
The report calculates the amount attributed to the component reason for each frequency time period.

Average Salary By Group Report

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

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

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

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

Business Questions

How do salaries compare across members of a particular group?

Parameters

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

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Average Salary Trend Report

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

Business Questions

How have average salaries changed over time?

Parameters

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

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

- Reporting Dates

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Frequency and Reporting Dates, page 1-7

Salary and Grade Range Report

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

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

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

Business Questions

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

Parameters

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

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Salary Component Trend Report

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

determine what is the total cost from January 1999 to January 2000 of salary changes attributed to cost of living.

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

Business Questions

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

Parameters

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

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Frequency and Reporting Dates, page 1-7

Salary Spread Report

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

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

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

Key Concepts

In order for this report to return data, you must have successfully attached performance reviews to the pay proposals. To attach a performance review, set a performance

review date before you approve the pay proposal. For instructions see: Changing Other Information in Proposing a Salary Change for a Current Employee, *Oracle HRMS Compensation and Benefits Management Guide*

Business Questions

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

Parameters

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

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Employee Salary (Organization Hierarchy) Trend Analytics Workbook

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

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization

- Rollup Organizations – Yes/No
- Convert to Currency

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

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

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

Worksheets

This workbook has the following worksheets:

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

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

Headings and Calculations

All worksheets contain the following columns:

- **A time period column**

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

- **Organization**

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

- **Date**

The date corresponding to the start of each time period.

- **Total Salary**

The total salary for each time period and organization.

- **Average Salary**

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Employee Salary Component (Organization Hierarchy) Trend Analytics Workbook

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

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

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

Business Questions

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

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

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

- Location
- Job Category
- Job
- Grade
- Position
- Salary Component Reason
- Include Currencies

Worksheets

This workbook has the following worksheets:

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

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

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

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**
The start date of the time period.
- **End Date**
The end date of the time period.
- **A time period column**
This heading depends on the selected worksheet, for example, in the by Quarter worksheet, this column is named "Quarter".
- **Salary component reason columns**
One column for each defined salary component reason – the total cost of the salary component for each time period.
- **Blank**
The total cost of salary components with no associated reason for each time period.
- **Total**
The total cost of all salary components for each time period.
If no salary proposals occurred in a specific time period, a row for that time period does not appear.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

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

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

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

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

Business Questions

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

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

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

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

- Location
- Job
- Grade
- Position
- Include Currencies

Worksheets

This workbook has the following worksheets:

- Full Details
- Graph

Full Details Worksheet

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

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

Business Questions

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

Worksheet Headings and Calculations

The table displays the following columns:

- **Grade**
The employee's current grade.
- **Person**
The employee's name.
- **Salary**
The employee's current salary.
- **Grade Min**
The minimum salary for the grade
- **To Min**
If the employee's salary is less than the grade minimum, displays the difference between the two. This could occur if grade rates change, leaving the salary of an employee below the new grade minimum.
- **Grade Mid**
The mid salary for the grade
- **To Mid**
If the employee's salary is less than the grade mid point, displays the difference between the two.
- **Grade Max**
The maximum salary for the grade
- **To Max**
If the employee's salary is less than the grade maximum, displays the difference between the two.
- **Organization**
The employee's organization.
- **Location**
The employee's location.

- **Job**
The employee's job.
- **Position**
The employee's position.

Graph Worksheet

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

The table displays one row for each employee.

Business questions

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

Worksheet Headings and Calculations

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

- **Person**
The employee's name.
- **Below Min**
The grade minimum value.
- **Min to Mid**
The difference between the grade minimum and grade mid-point values.
- **Mid to Max**
The difference between the grade mid-point and grade maximum values.

Chart

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

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Employee Salary by Group (Organization Hierarchy) Status Analytics Workbook

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

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

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

Business Questions

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

How do salaries vary between different ethnic groups?

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

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

Worksheets

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

- By Organization
- By Location
- By Job
- By Grade
- By Position

- By Performance Rating
- By Length of Work Band
- By Age Band
- By Gender
- By US Ethnic Group
- By GB Ethnic Group

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

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

Headings and Calculations

All worksheets contain the following columns

- **A grouping column**

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

- **Average Salary**

The current average annualized salary per grouping.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Employee Salary by Job and Grade Status Workbook

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

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

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

Business Questions

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

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

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

Headings and Calculations

This report uses the following calculations:

- **Annualized Grade Maximum**

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

- **Annualized Grade Mid Value**

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

- **Annualized Grade Minimum**

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

- **Number of incumbents**

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

Supervisor Hierarchy Worksheet

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

Business Questions

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

Parameters

You must specify values for the following parameters:

- Supervisor
- Effective Date

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

Headings and Calculations

This report uses the following calculations:

- **Annualized Grade Maximum**
Calculates the annualized maximum payment in a grade range. The calculation uses the grade annualization factor that is set up as part of the pay basis.
- **Annualized Grade Mid Value**
Calculates the annualized mid value payment in a grade range. The calculation uses the grade annualization factor that is set up as part of the pay basis.
- **Annualized Grade Minimum**
Calculates the annualized minimum payment in a grade range. The calculation uses the grade annualization factor that is set up as part of the pay basis.
- **Number of incumbents**
This returns the total number of assignments for an employee on the effective date.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Employee Salary Spread (Organization Hierarchy) Detail Analytics Workbook

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

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

Business Questions

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

How do salaries vary across age groups?

How do salaries vary across organizations or locations?

To what extent do salaries increase with length of service?

Key Concepts

In order for this report to return data, you must have successfully attached performance reviews to the pay proposals. To attach a performance review, set a performance review date before you approve the pay proposal. For instructions see: Changing Other Information in Proposing a Salary Change for a Current Employee, *Oracle HRMS Compensation and Benefits Management Guide*

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

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

Worksheets

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

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

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

Headings and Calculations

All worksheets contain the following columns

- **A grouping column**

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

- **Person**

Employee names listed within each grouping.

- **Total Salary**

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Salary Survey Comparison Workbook

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

Worksheets

This workbook has the following worksheets:

- Salary Survey Mappings

Salary Survey Mappings Worksheet

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

Business Questions

What are the details of salary surveys?

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 3-2

Salary Distribution Within Grade Range KPI PMV Report

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

- HRI Workforce Assignment Count Above Grade Mid Point KPI, page 3-20
- HRI Workforce Assignment Count Below Grade Mid Point, page 3-20

Report Parameters

You must specify values for the following parameters:

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

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

- Grade
- Location
- Job

- Position

Salary to Grade Mid Point Variance Status KPI PMV Report

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

- HRI Salaries Varying From Grade Mid Point KPI, page 3-20

Report Parameters

You must specify values for the following parameters:

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

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

- Job
- Position
- Location

HRI Salaries Varying From Grade Mid Point KPI

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

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

Related Topics

Key Performance Indicators – Key Concepts, page 1-5

HRI Workforce Assignment Count Above Grade Mid Point KPI

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

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

Related Topics

Key Performance Indicators – Key Concepts, page 1-5

HRI Workforce Assignment Count Below Grade Mid Point KPI

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

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

Related Topics

Key Performance Indicators – Key Concepts, page 1-5

Employee Detail

The Employee Detail report displays employee 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 1-30
- Period, page 1-33
- Manager, page 1-32
- Currency, page 1-29
- Staff, page 1-35
- Area, page 1-27
- Country, page 1-29
- Job Function, page 1-31
- Job Family, page 1-30
- Length of Service Band, page 1-32
- Performance Band, page 1-33

Headings

This report includes the following headings:

- Name: The employee's name.
- Manager, page Glossary-19
- Department, page Glossary-11
- 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 1-29
- Length of Service (Years), page 1-22
- Performance Band, page 1-33

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Employee 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29
- Time, page 1-38

Calculations

The report uses the following calculations:

- Headcount, page 1-17
- Salary, page 1-23

Reports and Links

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

Headcount and Salary 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

Calculations

This report uses the following calculations:

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

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

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:

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

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 Status

The Salary by Manager Status 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: $(\text{Current Total Salary} - \text{Previous Total Salary}) * 100 / \text{Previous Total Salary}$. 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: $(\text{Current Average Salary} - \text{Previous Average Salary}) * 100 / \text{Previous Average Salary}$.

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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

Calculations

This report uses the following calculations:

- 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:

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

- Average Salary: The average salary paid to employees reporting to the selected manager by country as of the reporting date. This is calculated as:

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

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

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

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 Summary Status report, page 8-87 (for a specific manager) available from the Manager column names and Direct Reports.
- Salary by Job Function Status report, page 3-25 available from the Total Salary column values.
- Employee Detail report, page 3-21 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

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

- **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:

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

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 3-26 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29
- Job Function, page 1-31

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:

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

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

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 3-21 available from the Total Salary 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29
- View By -Time, page 1-38

Reports and Links

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

Organization Structures Intelligence

Organization Structures Intelligence

Organization Workforce Report

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

To investigate the workforce changes for a particular organization, click on the organization name in the report table to access the Workforce Summary Analysis report, page 8-72.

Business Questions

Tell me about changes in my workforce throughout my organization.

Report Parameters

This report has the following mandatory parameters:

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

Use this parameter to control how the report displays your data.

- Order By
- Reporting Dates

Report Key Concepts

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

Separation Variance

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

Report Headings and calculations

This report uses the following calculations:

Total Workforce Calculation

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

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

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

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

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

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

Worksheets

This workbook has the following worksheets:

- By Establishment Hierarchy
- By Organization Hierarchy

By Establishment Hierarchy Worksheet

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

Business Questions

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

Parameters

You must specify values for the following parameters:

- Establishment Hierarchy
- Top Establishment
- Effective Date

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

Headings and Calculations

This worksheet uses the following calculations:

- **Male**

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

- **Female**

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

By Organization Hierarchy Worksheet

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

Business Questions

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

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

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

Headings and Calculations

This worksheet uses the following calculations:

- **Male**

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

- **Female**

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

People, Budgets and Costing Intelligence

People, Budgets and Costing Intelligence

Key Concepts for People Budgets and Costing Intelligence

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

- Workforce Count, page 6-2
- Control Budgets, page 6-2

Workforce Count

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

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

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

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

Control Budgets

HRMSi provides budget trend and budget status reports for control budgets. You can review differences between your budgeted workforce and the actual number of employees for specific budgets, organizations, jobs, grades, or positions.

See: Position Control, *Oracle HRMS Enterprise and Workforce Management Guide*

See: People Budgets and Costing Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

Employee Budget Trend Workbook

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

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

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

Worksheets

This workbook has the following worksheets:

- Open Budgets
- By Organization
- By Job

- By Grade
- By Position

Workbook Parameters

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

- Business Group
- Budget Name

Key Concepts

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

Budget Entities

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

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

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

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

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

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

Headings and Calculations

The report uses the following calculations:

- **Workforce Variance**

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

- **Workforce variance ratio**

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

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 6-2

Employee Budget Status Workbook

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

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

Worksheets

This workbook has the following worksheets:

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

Workbook Parameters

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

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

Key Concepts

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

Budget Entities

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

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

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

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

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

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

Headings and Calculations

The report uses the following calculations:

- **Workforce Variance**

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

- **Workforce variance ratio**

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

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 6-2

Employee Budget Trend Report

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

This report covers current position controlled budgets only.

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

Business Questions

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

Report Parameters

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

- Budget
- Budget Measurement Type
- Reporting Dates

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

Key Concepts

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

Budget Entities

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

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

- Sales West Grade 1 budget
Budget Value = 10
- Sales West Grade 2 budget
Budget Value = 15

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

Budget Versions

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

Budget Time Periods

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

Headings and Calculations

The report uses the following calculations:

Budget Value

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

Workforce variance

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

$\text{Workforce Variance} = \text{Workforce Actual} - \text{Workforce Budgeted}$

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 6-2

Organization Budget (Employee) Status Report

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

This report covers current position controlled budgets only.

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

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

Business Questions

How do my workforce budgets compare with actual budgets?

Report Parameters

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

- Budget
- Budget Measurement Type

- Display
- Reporting Date

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

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

Key Concepts

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

Headings and Calculations

The report uses the following calculations:

Budget Value

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

Workforce variance

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

Workforce Variance = Workforce Actual - Workforce Budgeted

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 6-2

Employee Headcount Budget Trend Report

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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

Calculations

There are no calculations in this report.

Labor Cost Distribution by Organization

Labor Cost Distribution by Organization displays budgeted, committed, actual, and available amounts for your selected manager and subordinates, by organization, as of your selected period and effective date. You can compare changes to budget amounts (including percentage change) with the prior period or the prior year, in your currency of choice. You can access this page by clicking Labor Cost Distribution or Labor Cost Budget Trend from the Workforce Budget Management dashboard.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

The dashboard displays budget information for the rolling period you choose from the Period list, not an HRMS budget period.

The budget dashboard's Manager list uses an organization manager hierarchy instead of the manager hierarchy typical of DBI for HRMS dashboards, adding an additional filter that displays and considers only those subordinate managers who own organizations.

Calculations

This report uses the following calculations:

- Labor Cost, page 1-18

Labor Cost Distribution by Position

Labor Cost Distribution by Position displays budgeted, projected, actual, and available amounts for your selected manager and subordinates, by position, as of your selected period and effective date. You can compare budget amounts with the prior period or the prior year, in your currency of choice.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

The dashboard displays budget information for the rolling period you choose from the Period list, not an HRMS budget period.

The budget dashboard's Manager list uses an organization manager hierarchy instead of the manager hierarchy typical of DBI for HRMS dashboards, adding an additional filter that displays and considers only those subordinate managers who own organizations.

Calculations

This report uses the following calculations:

- Labor Cost, page 1-18

Labor Cost Distribution by Element

Labor Cost Distribution by Element displays budgeted, projected, actual, and available amounts for your selected manager and subordinates, by budget element, as of your selected period and effective date. You can compare budget amounts with the prior period or the prior year, in your currency of choice.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

The dashboard displays budget information for the rolling period you choose from the Period list, not an HRMS budget period.

The budget dashboard's Manager list uses an organization manager hierarchy instead of the manager hierarchy typical of DBI for HRMS dashboards, adding an additional filter that displays and considers only those subordinate managers who own organizations.

Calculations

This report uses the following calculations:

- Labor Cost, page 1-18

Labor Cost Distribution by Funding Source

Labor Cost Distribution by Funding Source displays budgeted, projected, actual, and available amounts for your selected manager and subordinates, by funding source, as of your selected period and effective date. You can compare budget amounts with the prior period or the prior year, in your currency of choice.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

The dashboard displays budget information for the rolling period you choose from the Period list, not an HRMS budget period.

The budget dashboard's Manager list uses an organization manager hierarchy instead of the manager hierarchy typical of DBI for HRMS dashboards, adding an additional filter that displays and considers only those subordinate managers who own organizations.

Calculations

This report uses the following calculations:

- Labor Cost, page 1-18

Workforce Occupancy Details

The Workforce Occupancy Details page displays the incumbents of the selected position, as of your period and effective date. You can view only those incumbents reporting to your selected manager and subordinates. The page provides related information for each person, such as organization, job, position, or grade. You can review committed, actual, and projected amounts for each person, in your preferred currency. You can also change the column sequence, or include links to web pages or related reports.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Manager, page 1-32

- Currency, page 1-29

The budget dashboard's Manager list uses an organization manager hierarchy instead of the manager hierarchy typical of DBI for HRMS dashboards, adding an additional filter that displays and considers only those subordinate managers who own organizations.

The page retrieves standard position occupancy data available in HRMS.

Related Reports and Links

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

- Employee Directory (Employee Details)

Labor Cost with Headcount

Labor Cost with Headcount displays budgeted and projected labor cost and headcount for your selected manager and subordinates as of your selected period and effective date. You can compare changes to budgeted amounts and headcount with the prior period or the prior year, in your currency of choice.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

Calculations

This report uses the following calculations:

- Labor Cost, page 1-18

Headcount Distribution by Organization Report

The Headcount Distribution by Organization Report displays budgeted and actual headcount for your selected manager and subordinates, by organization, as of your selected period and effective date. You can compare headcount change to the prior period or the prior year, and review budgeted, actual, and available amounts, along with percentage change.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28

- Manager, page 1-32

The dashboard displays budget information for the rolling period you choose from the Period list, not an HRMS budget period.

The budget dashboard's Manager list uses an organization manager hierarchy instead of the manager hierarchy typical of DBI for HRMS dashboards, adding an additional filter that displays and considers only those subordinate managers who own organizations.

Calculations

This report uses the following calculations:

- Headcount, page 1-17

Competencies, Qualifications, and Development Intelligence

Competencies, Qualifications, and Development Intelligence

Key Concepts for Competencies, Qualifications, and Development Intelligence

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

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

Competencies and Proficiencies

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

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

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

Competence Levels (Organization Hierarchy) Detail Analytics Workbook

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

Business Questions

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

Parameters

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

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

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

- Competence Name

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

Worksheets

This workbook has the following worksheets:

- By Person with Rank

- By Person

By Person with Rank Worksheet

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

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

Headings and Calculations

The Person with Rank worksheet contains the following columns:

- **Person**
The person's name.
- **Proficiency Level**
Each person's proficiency level for the selected competence.
- **Proficiency Level Percent**
Each person's percentage proficiency level for the selected competence.
- **Proficiency Level Rank**
Each person's proficiency rank for the selected competence.
- **Proficiency Rank Percent**
Each person's percentage proficiency rank for the selected competence.

By Person Worksheet

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

Headings and Calculations

This worksheet uses the following calculations:

- **Person**
The person's name.
- **Proficiency Level**
Each person's proficiency level for the selected competence.

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 7-2

Competence Match (Organization Hierarchy) Status Analytics Workbook

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

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

Business Questions

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

Parameters

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

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

Worksheets

This workbook has the following worksheets:

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

Compare to Minimum Proficiency Worksheet

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

Headings and Calculations

The Compare to Minimum Proficiency worksheet contains the following columns:

- **Competence**
The competencies you have defined for the job you selected in the Job parameter.
- **Min Required**
The minimum level required for the competence.

- **Max Required**

The maximum level required for the competence.

- **Without Competence**

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

- **Without Level**

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

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

The columns are as follows:

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

Compare to Range Worksheet

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

Headings and Calculations

The Compare to Range worksheet contains the following columns:

- **Competence**

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

- **Min Required**

The minimum level required for the competence.

- **Max Required**

The maximum level required for the competence.

- **Without Competence**

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

- **Without Level**

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

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

The columns are as follows:

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

By Organization and Location Worksheet

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

Headings and Calculations

The by Organization and Location worksheet contains the following columns:

- **Location Name**

- **Organization**

The organizations within each location.

- **Competence**

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

- **Person**

The people in each organization who hold the selected job.

- **Required Proficiency Level**

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

- **Requirement Effective From**

The date the proficiency level requirement began.

- **Requirement Essential**

Whether the competence is essential for the job.

- **Attained Proficiency Level**

The proficiency level attained by the person.

- **Date Attained**

The date the person attained the proficiency level.

By Person Worksheet

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

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

Headings and Calculations

The worksheet contains the following columns:

- **Competence**

The competencies you have defined for the selected job.

- **Requirement Effective From**

The date the proficiency level requirement began.

- **Requirement Essential**

Whether the competence is essential for the job.

- **Attained Proficiency Level**

The proficiency level attained by the person.

- **Date Attained**

The date the person attained the proficiency level.

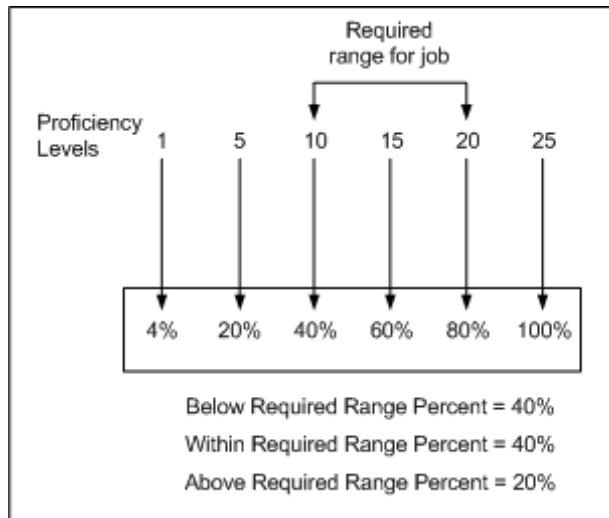
By Person Graph Worksheet

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

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

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

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



Headings and Calculations

The worksheet contains the following columns:

- Competence**
 The competencies you have defined for the selected job, for each selected organization.
- Below Required Range Percent**
 The percentage of proficiency levels for the competence that are below the required minimum level for the job.
- Within Required Range Percent**
 The percentage of proficiency levels for the competence that are within the required proficiency range for the job.
- Above Required Range Percent**
 The percentage of proficiency levels for the competence that are above the required maximum level for the job.
- Attained Level Percent**
 The percentage achievement level the selected person has attained for that competence.

Graph

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

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

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

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 7-2

Competence Levels Report

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

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

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

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

See: Group Competencies Report, page 7-9

Business Questions

How proficient are employees at a particular competency?

Parameters

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

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

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 7-2

Group Competencies Report

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

You can:

- View a list of all the people with a particular competence by selecting the competence you are interested in; this will run the Competence Levels report. For example, to list all the names and proficiency levels of people with communication skills, click on Communications in the table.
- View a list of all the people with a particular proficiency or proficiencies in a competence by selecting the number of people in that category; this will run the Competence Levels report. For example, you can list the names of the people with communications skills at a level below the required proficiency. You can then

investigate how an individual's competencies match the job and grade requirements by clicking on the individual's name; this will run the Individual Competencies report.

See: Competence Levels Report, page 7-9

See: Individual Competencies Report, page 7-11

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

Business Questions

How competent are my employees?

Parameters

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

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

Key Concepts

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

Reporting levels are:

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

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

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

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

Using the example of a senior manager, the lowest proficiency level required for the competence of team leading is 3. If all the counts are taken from the lowest proficiency level, employees with a proficiency level of 3 would be included in the exactly match

band, employees with a proficiency level of 4 would be in the 3, 2, or 1 proficiency level above band, and so on.

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

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

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

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

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 7-2

Individual Competencies Report

Run this report from the Group Competencies report.

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

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

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

See: Group Competencies Report, page 7-9

Business Questions

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

Parameters

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

- Job
- Grade
- Person

Key Concepts

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

For example, consider the following competencies and proficiency levels:

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

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

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

1 = 20

2 = 30

3 = 40

4 = 50

5 = 60

6 does not have a matching communication proficiency level.

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

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 7-2

People Management Intelligence

People Management Intelligence

Key Concepts for People Management Intelligence

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

- Workforce Count, page 8-2
- Workforce Gains and Losses, page 8-2
- Enterprise Selection, page 8-2
- Job Categories , page 8-4

Workforce Count

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

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

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

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

Workforce Gains and Losses

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

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

Note: Workforce is counted using active and suspended assignments.

Enterprise Selection

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

- Rollup Organizations
- Rollup Each Organization

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

Rollup Organizations

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

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

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

Rollup Each Organization

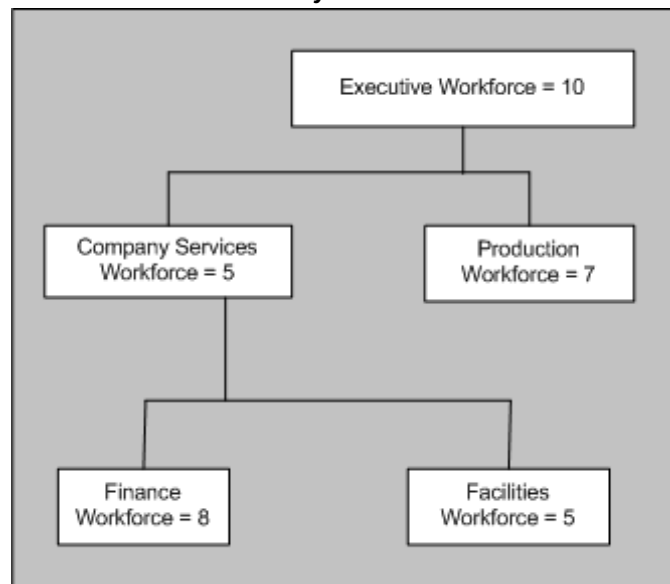
Select the area of your enterprise in the HTML reports by selecting a section of an organization hierarchy. For each report, you only need to enter one organization; all its subordinate organizations are included in the report.

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

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

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

Global Industries Hierarchy



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

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

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

Job Categories

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

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

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

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

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

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

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

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

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

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

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

Workforce Count (Organization Hierarchy) Trend Analytics Workbook

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

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

Business Questions

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

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

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

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

Worksheets

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

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

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

Workbook Headings and Calculations

The worksheets contain the following columns:

- **A time period column**

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

- **Date**

The start date of each time period.

- **Organization**

Appears only in the by Year and Organization worksheet.

- **Area**

Appears only in the by Year and Geography worksheet.

- **Workforce Measurement Value**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Count Change (Organization Hierarchy) Status Analytics Workbook

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

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy

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

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

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

Worksheets

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

- By Organization
- By Geography Area
- By Separation Category

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

Workbook Headings and Calculations

The worksheets contain the following columns:

- **A grouping column**

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

- **Start**

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

- **End**

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

- **Change**

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

- **Change Percent**

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

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

the numeric change in the workforce total divided by the Workforce Measurement Value on the Start Date.

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Separation by Competence (Organization Hierarchy) Status Analytics Workbook

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

Business Questions

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

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

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

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

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

Worksheets

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

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

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

By Organization Worksheet and by Geography Area Worksheet Headings and Calculations

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

- **A grouping column**
The heading depends on the selected worksheet, for example, in the by Organization worksheet, this column is named "Organization".
- **Competence columns** (one column per defined competence)
The number of people in each group who have separated from the workforce during the selected time period, and hold the competence.

By Scale Level Worksheet Headings and Calculations

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

The matrix report contains the following columns:

- **Competence**
The competencies associated with people who have separated from your workforce in the selected time period.
- **Min Required**
The minimum proficiency level required for the competence.
- **Max Required**
The maximum proficiency level required for the competence.
- **Scale level columns** (one column per defined scale level)
The number of people who have separated from the workforce during the selected time period and have achieved the scale level for the competence.
- **Blank**
The number of people who have separated from the workforce during the selected time period, with no associated scale level for the competence.

By Rank Level Worksheet Headings and Calculations

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

The matrix report contains the following columns:

- **Competence**
The competencies associated with people who have separated from your workforce in the selected time period.
- **Min Required**
The minimum proficiency level required for the competence.
- **Max Required**
The maximum proficiency level required for the competence.
- **Rank level columns** (one column per defined rank level)
The number of people who have separated from the workforce during the selected time period and have achieved the rank level for the competence.
- **Blank**
The number of people who have separated from the workforce during the selected time period, with no associated rank level for the competence.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Separation by Competence (Organization Hierarchy) Trend Analytics Workbook

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

Worksheets

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

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

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Start Date**

The start date of each time period.

- **End Date**

The end date of each time period.

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

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

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

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

Business Questions

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

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

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

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

Worksheets

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

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

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

Headings and Calculations

The matrix reports contain the following columns:

- **A grouping column**

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

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

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

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

- **Total**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

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

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

- Job
- Grade
- Position

Worksheets

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

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

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**
The heading depends on the selected worksheet, for example, in the by Month worksheet, this column is named "Month".
- **Start Date**
The start date of each time period.
- **End Date**
The end date of each time period.
- **Length of work band columns** (one column per defined length of work band)
The number of people who have separated from the workforce whose length of service matches the length of work band.
- **Total**
The total number of separations for the time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Separation by Reason (Organization Hierarchy) Status Analytics Workbook

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

Business Questions

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

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

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

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

Worksheets

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

- By Organization
- By Geography Area
- By Separation Category

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

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

Headings and Calculations

The matrix reports contain the following columns:

- **A grouping column**

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

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

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

- **A blank column**

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

- **Total**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Separation by Reason (Organization Hierarchy) Trend Analytics Workbook

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

Worksheets

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

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

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Start Date**

The start date of each time period.

- **End Date**

The end date of each time period.

- **Leaving reason columns** (one column per defined leaving reason, divided into voluntary and involuntary leaving reasons)

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

- **Blank**

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

- **Total**

The total number of separations for the time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Separation (Organization Hierarchy) Template Analytics Workbook

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

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

Workbook Parameters

The template includes the following mandatory parameters:

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

The template includes the following optional parameters:

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

Worksheets

This template workbook has the following worksheets:

- By Year, Organization and Separation Category
- Details

By Year, Organization and Separation Category Worksheet

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

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

Headings and Calculations

The worksheet contains the following columns:

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

The start date of the year.

- **End Date**

The end date of the year.

- **Separation Category columns**

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

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

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

- **Total**

The total number of separations within each year.

Details Worksheet

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

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

Headings and Calculations

The worksheet contains the following columns:

- **Event date**

The date on which the separation occurred.

- **Workforce Separations**

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

- **Organization**

The organization that had the separation.

- **Location**

The location from which the separation took place.

- **Job**

The job that had the separation.

- **Grade**

The grade that had the separation.

- **Position**

The position that had the separation.

- **Separation Category**

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

- **Separation Reason**

The reason for the separation.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

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

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

Business Questions

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

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

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

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

Worksheets

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

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

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

Headings and Calculations

The matrix reports contain the following columns:

- **A grouping column**

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

- **Job Category**

The job categories that exist for each worksheet grouping.

- **Start**

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

- **End**

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

- **Change**

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

- **Change Percent**

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

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

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

As an example, if the difference between the Workforce Measurement Value on the start date and end date is 10, and the start date workforce Measurement Value is 120, the percentage change in the workforce total is $10/120$, making a percentage change of 8.33%.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

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

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

Worksheets

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

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

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Date**

The start date of each time period.

- **Job Category**

Lists the job categories that exist within each time period.

- **Workforce Measurement Value**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Count (Organization Hierarchy) Template Analytics Workbook

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

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

Workbook Parameters

The template includes the following mandatory parameters:

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

The template includes the following optional parameters:

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

- Job
- Grade
- Position

Worksheets

This template workbook has the following worksheets:

- By Year
- Details

By Year Worksheet

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

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

Headings and Calculations

The worksheet contains the following columns:

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

The start date of the year.

- **Workforce Measurement Value**

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

Details Worksheet

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

Use the Year page item in the worksheet to select the year you are interested in.

The worksheet displays one row for each organization, location, job, grade, and position.

Headings and Calculations

The worksheet contains the following columns:

- **Organization**

The organization that had the gain.

- **Location**

The location where the gain took place.

- **Job**

The job of the gain.

- **Grade**

The grade of the gain.

- **Position**

The position of the gain.

- **Workforce Measurement Value**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Gain (Organization Hierarchy) Status Analytics Workbook

The Workforce Gain (Organization Hierarchy) Status Analytics workbook lists the total gains that occurred within a given time period for various groups such as organization, location, gender, and ethnic origin. Each worksheet represents the total gains for one specific grouping. You can also select which area of your enterprise you want to investigate.

The workbook identifies a gain when an employee is active one day and inactive the next. It attributes the gain to the first date on which the employee is not active.

The report shows gains caused by transfers in depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of gains to my workforce, broken down into separations, long-term absence ends, transfers and secondary assignment starts, compare for different groupings in my organization?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

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

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

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

- Job
- Grade
- Position

Worksheets

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

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

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

Headings and Calculations

The worksheets contain the following columns:

- **A grouping column**

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

- **New Starts**

The total number of new starts for each grouping.

- **Transfers**

The total number of transfers in for each grouping.

- **Secondary Assignment Starts**

The total number of secondary assignment starts for each grouping.

- **Long Term Absence Returns**

The total number of returns from long term absences for each grouping.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Gain (Organization Hierarchy) Trend Analytics Workbook

The Workforce Gain (Organization Hierarchy) Trend Analytics workbook lists the total gains that occurred within a given date range for time periods such as year, semi-year, month, bi-month, and quarter. Each worksheet represents the total gains for one specific time period. You can also select which area of your enterprise you want to investigate.

The workbook identifies a gain when an employee is inactive one day and active the next. It attributes the gain to the first date on which the employee is active.

The workbook shows gains caused by transfers in depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of gains to my workforce, broken down into new starts, long-term absence ends, transfers in and secondary assignment starts, change over time?

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

Worksheets

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

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

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Start Date**

The start date of each time period.

- **End Date**

The end date of each time period.

- **Total Gains**

The total of all workforce gains due to new starts, transfers in, secondary assignment starts, and long term absence returns.

- **New Starts**

The total workforce gains attributable to new starters with the organization.

- **Transfers**

The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

The total workforce gains attributable to returns from long term absences.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Gain (Organization Hierarchy) Template Analytics Workbook

The Workforce Gain (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating workforce gains that occur within yearly periods and within different organizations, the other providing a detailed analysis of gains in the workforce.

These worksheets help you to create reports to analyze how your workforce is growing. The workbook identifies a gain when an employee is inactive one day and active the next. It attributes the gain to the first date on which the employee is active.

The workbook shows gains caused by transfers in depending on the portion of the organization hierarchy you are viewing.

Workbook Parameters

The template includes the following mandatory parameters:

- Start Date
- End Date

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

The template includes the following optional parameters:

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

Worksheets

This template workbook has the following worksheets:

- By Year and Organization
- Detail

By Year and Organization Worksheet

The by Year and Organization worksheet analyses how workforce gains have occurred, and compares the gains over time and across organizations.

It displays one row for each organization within each year.

Headings and Calculations

The worksheet contains the following columns:

- **Year**
- **Year Start Date**
- **Year End Date**
- **Organization**

The name of each organization in which gains have occurred within each year.

- **Total Gains**

The total of all workforce gains due to new starts, transfers in, secondary assignment starts, and long term absence returns.

- **New Starts**

The total workforce gains attributable to new starters with the organization.

- **Transfers**

The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

The total workforce gains attributable to returns from long term absences.

Detail Worksheet

The Detail worksheet tells you how the gains occurred and how the gains have been deployed within the workforce.

The worksheet displays one row for all gain events occurring on a specific date within the worksheet parameter start and end dates, within each organization, location, job, grade, and position.

Headings and Calculations

The worksheet contains the following columns:

- **Event Date**

The date the gain took place.

- **Total Gains**

The total of all workforce gains occurring on the event date within the same organization, location, job, grade and position.

- **New Starts**

The total workforce gains attributable to new starters with the organization.

- **Transfers**

The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

The total workforce gains attributable to returns from long term absences.

- **Organization**

The organization that had the gain.

- **Location**

The location where the gain took place.

- **Job**

The job of the gain.

- **Grade**

The grade of the gain.

- **Position**

The position of the gain.

- **Workforce Measurement Value**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Loss (Organization Hierarchy) Status Analytics Workbook

The Workforce Loss (Organization Hierarchy) Status Analytics workbook lists the total losses that occurred within a given time period for various groups such as organization, location, gender, and ethnic origin. Each worksheet represents the total losses for one specific grouping. You can also select which area of your enterprise you want to investigate.

The workbook identifies a loss when an employee is active one day and inactive the next. It attributes the loss to the first date on which the employee is not active.

For terminations, the loss occurs one day after the termination separation date (as the termination date coincides with the employees' last day at work).

The workbook includes long-term absences or suspensions only once. If you permanently terminate or transfer an employee who is on long-term absence or suspension, the report does not count the termination or transfer because the employee wasn't active when terminated or transferred.

The report shows losses caused by transfers out depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of losses from my enterprise, broken down into separations, long term absences, transfers and secondary assignment ends, compare for different groupings in my organization?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

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

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

- Geography Area
- Geography Country
- Geography Region

- Geography Location
- Job Category
- Job
- Grade
- Position

Worksheets

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

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

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

Headings and Calculations

The worksheets contain the following columns:

- **A grouping column**

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

- **Separations**

The total number of separations from your organization for each grouping.

- **Transfers**

The total number of transfers out of your organization for each grouping.

- **Secondary Assignment Ends**

The total number of secondary assignment ends for each grouping.

- **Long Term Absences**

The total number of long term absences for each grouping.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Loss (Organization Hierarchy) Trend Analytics Workbook

The Workforce Loss (Organization Hierarchy) Trend Analytics workbook lists the total losses that occurred within a given date range for time periods such as year, semi-year, month, bi-month, and quarter. Each worksheet represents the total

losses for one specific time period. You can also select which area of your enterprise you want to investigate.

The workbook identifies a loss when an employee is active one day and inactive the next. It attributes the loss to the first date on which the employee is not active.

For terminations, the loss occurs one day after the termination separation date (as the termination date coincides with the employees' last day at work).

The workbook includes long-term absences or suspensions only once. If you permanently terminate or transfer an employee who is on long-term absence or suspension, the report does not count the termination or transfer because the employee wasn't active when terminated or transferred.

The workbook shows losses caused by transfers out depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of losses from my enterprise, broken down into separations, long term absences, transfers and secondary assignment ends, change over time?

Workbook Parameters

You must enter a value for the following parameters:

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

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

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

Worksheets

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

- By Year
- By Semi Year

- By Quarter
- By Bi Month
- By Month
- By Position

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Start Date**

The start date of each time period.

- **End Date**

The end date of each time period.

- **Total Losses**

The total workforce losses for the period.

- **Separations**

The total workforce losses attributable to separations from your organization.

- **Transfers**

The total workforce losses attributable to transfers out of the organization for time period.

- **Secondary Assignment Ends**

The total workforce losses attributable to the ending of secondary assignments within the organization for time period.

- **Long Term Absences**

The total workforce losses attributable to long term absences from the organization for time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Loss (Organization Hierarchy) Template Analytics Workbook

The Workforce Loss (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating workforce losses that occurred within yearly periods and within different organizations, the other providing a detailed analysis of losses in the workforce.

These worksheets help you to create reports to analyze how your workforce is decreasing. The workbook identifies a loss when an employee is active one day and inactive the next. It attributes the loss to the first date on which the employee is inactive.

The workbook shows losses caused by transfers out depending on the portion of the organization hierarchy you are viewing.

Workbook Parameters

The template includes the following mandatory parameters:

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

The template includes the following optional parameters:

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

Worksheets

This template workbook has the following worksheets:

- By Year and Organization
- Detail

By Year and Organization Worksheet

The by Year and Organization worksheet analyses when and where workforce gains occur. It compares workforce gains over time and across organizations.

It displays one row for each organization within each year.

Headings and Calculations

The worksheet contains the following columns:

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

- **Year End Date**
- **Organization**
The name of each organization in which losses have occurred within each year.
- **Total Losses**
The total of all workforce losses due to separations, transfers out, secondary assignment ends, and long term absences.
- **Separations**
The total workforce losses attributable to separations from the organization.
- **Transfers**
The total workforce losses attributable to transfers out of the organization.
- **Secondary Assignment Ends**
The total workforce losses attributable to the ending of secondary assignments.
- **Long Term Absences**
The total workforce losses attributable to long term absences from the organization.

Detail Worksheet

The Detail worksheet tells you how losses occurred and where losses occurred within the workforce.

The worksheet displays one row for all loss events occurring on a specific date within the worksheet parameter start and end dates, within each organization, location, job, grade, and position.

Headings and Calculations

The worksheet contains the following columns:

- **Event Date**
The date the loss took place.
- **Organization**
The organization that had the loss.
- **Location**
The location where the loss took place.
- **Job**
The job of the loss.
- **Grade**
The grade of the loss.
- **Position**
The position of the loss.
- **Total Losses**

The total of all workforce losses occurring on the event date within the same organization, location, job, grade and position.

- **Separations**

The total workforce losses attributable to separations from the organization.

- **Transfers**

The total workforce losses attributable to transfers out of the organization.

- **Secondary Assignment Ends**

The total workforce losses attributable to the ending of secondary assignments.

- **Long Term Absences**

The total workforce losses attributable to long term absences from the organization.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Employee Movement by Organization Analysis Workbook

This workbook investigates changes in organization employees over specified periods of time. Changes are measured using budget measurement type as a parameter, and retrieving the relevant assignment budget value.

The resulting information enables you to:

- Analyze employee turnover across organizations by quarter
- View hire information across organizations
- Analyze terminations across organizations
- View employee transfer information across organizations

Worksheets

This workbook has the following worksheets:

- Hires, Terminations and Transfers
- Hires
- Terminations
- Transfers In
- Transfers Out

Hires, Terminations and Transfers Worksheet

This worksheet enables you to view high-level information about the value of hires, terminations, and transfers in all organizations within your Business Group, by year quarter. The resulting information enables you to:

- Analyze employee changes by quarter.
- Compare employee change across all organizations within a Business Group.

Business Questions

What are the workforce movements within my organization?

Parameters

You must specify values for the following parameters:

- Summary Budget Measurement Type
- Summary Year
- Summary Quarter

Hires Worksheet

This worksheet displays hire information in detail. The worksheet enables you to analyze hire information by job, position, assignment, or location. It enables you to:

- Analyze hire trends within an organization.
- Analyze skills required within an organization.

Business Questions

Who has been hired into my organization?

Parameters

You must specify values for the following parameters:

- Hires Budget Measurement Type
- Hires Year
- Hires Quarter

Terminations Worksheet

This worksheet enables you to analyze terminations within your organizations in detail. For each termination you can analyze employee terminations across all organizations within a Business Group.

Business Questions

Who has left my organization?

Parameters

You must specify values for the following parameters:

- Termination Budget Measurement Type
- Termination Year
- Termination Quarter

Transfers In Worksheet

This worksheet enables you to investigate the total budget value of employees transferring into different organizations in your Business Group. For each transfer you can analyze the:

- Organization transferred from.
- Location transferred from.
- Position or job transferred from.

Business Questions

Who has transferred into my organization?

Parameters

You must specify values for the following parameters:

- Transfers In Budget Measurement Type
- Transfers In Year
- Transfers In Quarter

Transfers Out Worksheet

This worksheet enables you to investigate the total budget value of employees transferring out of different organizations in your Business Group. For each transfer you can analyze the:

- Organization transferred to.
- Location transferred to.
- Position or job transferred to.

Business Questions

Who has transferred out of my organization?

Parameters

You must specify values for the following parameters:

- Transfers Out Budget Measurement Type
- Transfers Out Year
- Transfers Out Quarter

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Employee Primary Assignment Count (by Location and Employment Category) Comparison Workbook

This workbook enables you to report on employee primary assignment numbers by location, for organization and supervisor hierarchies.

The workbook groups employee primary assignments by employment category (for example, Fulltime – Regular, Fulltime – Temporary). Employee assignments that are not assigned an employment category display in a blank worksheet column.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Without Organization Hierarchy
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given organization hierarchy.

You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Business Questions

How many employees for a given organization work in each location?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date
- Assignment Statuses To Include
- Locations to Include

The worksheet includes employees who have an assignment on the effective date, at a selected location, within the selected organization hierarchy.

You can further restrict the report by using the following parameter:

- Person Types to Exclude

Without Organization Hierarchy Worksheet

The Without Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location without using organization or supervisor hierarchies.

You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Business Questions

How many employees work in each location?

Parameters

You must specify values for the following parameters:

- Effective Date
- Assignment Statuses To Include

- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes the selected people types who have an assignment on the effective date that matches a selected assignment status, and is at a selected location.

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given supervisor.

You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Business Questions

How many employees reporting to a specific supervisor work in each location?

Parameters

You must specify values for the following parameters:

- Supervisor Name
- Effective Date
- Assignment Statuses To Include
- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes employees who have an assignment on the effective date with a selected assignment status, at a selected location, and within the selected supervisor hierarchy.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Employee Primary Assignment Count (by Organization and Employment Category) Comparison Workbook

This workbook enables you to report on employee primary assignment numbers by organization, for organization and supervisor hierarchies.

The workbook shows employee primary assignment count for each employment category (for example, Full time – Regular, or Full time – Temporary). Employee assignments that do not have an employment category display in a column with a blank title in each worksheet.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy
- Organization Hierarchy Rollup
- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on employee primary assignment numbers by location for a given organization hierarchy.

You can use the worksheet parameters to customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

Business Questions

How many employees work in each organization in my hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date
- Assignment Statuses To Include
- Locations to Include

The worksheet includes employees who have an assignment on the effective date, at a selected location, within the selected organization hierarchy.

You can further restrict the report by using the following parameter:

- Person Types to Exclude

Organization Hierarchy Rollup Worksheet

The Organization Hierarchy Rollup worksheet allows you to report on employee primary assignment numbers by Organization Rollup for a given organization.

The worksheet parameters enable you customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

Business Questions

How many employees work in each organization in my hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy
- Top Organization
- Effective Date

- Assignment Statuses To Include
- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes the selected people types who have an assignment on the effective date that matches a selected assignment status, and is at a selected location, and within the selected hierarchy.

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on employee primary assignment numbers by organization for a given supervisor.

Use the worksheet parameters to configure the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

Business Questions

How many employees reporting, directly or indirectly to a specific supervisor, work in each organization in my hierarchy?

Parameters

You must specify values for the following parameters:

- Supervisor Name
- Effective Date
- Assignment Statuses To Include
- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes employees who have an assignment on the effective date with a selected assignment status, at a selected location, and within the selected supervisor hierarchy.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Assignment Activity Analysis Workbook (EDW)

The Workforce Assignment Activity Analysis workbook gives you a view of the changes in workforce assignments within your enterprise; for example, the number of grade and location changes within a particular organization.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Organization Changes
- Location Changes
- Grade Changes

Organization Changes Worksheet

The Organization Changes worksheet provides a summary of the headcount or full-time equivalent for employees changing organizations within a specified calendar year. Initially the worksheet only displays the top-level employing organizations; you need to drill down to see transfers between organizations further down the organizational hierarchy.

The worksheet excludes new hires to your enterprise, since new hires have not changed organization.

Business Questions

How many transfers have occurred over the past 12 months?

Parameters

This worksheet has no parameters.

Location Changes Worksheet

The Location Changes Worksheet provides a summary of the head count or full time equivalent for people changing locations for a specified top-level employing organization within a specified calendar year.

The worksheet uses a grid to represent the location changes for an employee; the location the employee moved from appears on the left, and the location the employee moved to appears across the top.

The worksheet excludes new hires to your enterprise, since new hires have not changed location.

Business Questions

How many people have changed location or have been re-deployed to a specific location over the last year?

Parameters

This worksheet has no parameters.

Grade Changes Worksheet

The Grade Changes worksheet provides a summary of the head count or full time equivalent, or the average number of months between grade changes, for a specified top-level employing organization within a particular calendar year, for employees changing grade.

The worksheet uses a grid to represent the grade changes for an employee; the grade the employee changed from appears on the left, and the grade the employee changed to appears across the top.

The worksheet excludes new hires to your enterprise, since new hires have not changed grade.

Business Questions

How many grade changes have occurred in the enterprise this year?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Composition Analysis Workbook (EDW)

The Workforce Composition Analysis workbook is designed to give you detailed analysis of the makeup of the workforce, including items such as headcount or full-time equivalent, period of work, location of workforce, and sensitive employment data. This data is then displayed by organization.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Composition Summary, page 8-45
- Composition by Period of Service, page 8-46
- Composition by Age Band, page 8-46
- Composition by Disability Status, page 8-46
- Composition by Gender, page 8-47
- Composition by Location, page 8-47

Composition Summary Worksheet

The Composition Summary worksheet provides a summary of person head count or full-time equivalent for top-level employing organizations for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

Show me my workforce full-time equivalent broken down for each organization in a Business Group.

What is the workforce headcount for a specific organization and its subordinates, for a specific organization hierarchy version?

Show me the total workforce full-time equivalents in my Business Group.

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Period of Service Worksheet

The Composition by Period of Service worksheet provides a summary of person head count or full-time equivalent by period of service for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

Show me my workforce by length of service band.

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Age Band Worksheet

The Composition by Age Band worksheet provides a summary of person head count or full-time equivalent by employee age band for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

Show me my workforce broken by age band.

What are the current ages of my workforce in age bands?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Disability Status Worksheet

The Composition by Disability Status worksheet provides a summary of person head count or full-time equivalent by disability status (disabled, not disabled, or undefined) for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

What is my workforce composition over time?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Gender Worksheet

The Composition by Gender worksheet provides a summary of person head count or full-time equivalent by gender for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

What is my workforce full-time equivalent by gender over time?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Location Worksheet

The Composition by Location worksheet provides a summary of person head count or full-time equivalent, by location, for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

What is the composition of my workforce at each location of my enterprise, over time?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Planning Summary Analysis Workbook (EDW)

The Workforce Planning workbook is designed to give an executive overview of workforce changes within an enterprise. This workbook is intended for Human Resources staff at the Director level or above.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Recruitment by Organization, page 8-48
- Recruitment Efficiency (Average Days), page 8-48
- Composition Summary, page 8-49
- Composition by Location, page 8-49
- Organization Changes, page 8-50
- Separation by Organization, page 8-50
- Voluntary/Involuntary Separation, page 8-50

Recruitment by Organization Worksheet

The Recruitment by Organization worksheet gives you a recruitment summary by top-level employing organization. You can report on the following measures:

- Head count
- Full-time equivalent
- Average number of days between application and hire
- Average number of days

Business Questions

Show me my total gains for all the organizations in the primary hierarchy of a Business Group.

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**
Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Recruitment Efficiency (Average Days) Worksheet

The Recruitment Efficiency (Average Days) worksheet provides information concerning efficiency of recruitment for a specified calendar year (based on the date employment started) for each top-level employing organization.

You can report on the average number of days from application to termination (the date the application was ended by the employer or the applicant), first interview, second interview, offer, acceptance, and hire.

Business Questions

Show me the average time to hire/offer/first interview by job, location, etc.

What is the average time to offer/rejection by job, location, etc?

From which locations/jobs do we have the greatest difficulty (based on average time to hire) or the greatest cost in hiring?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Composition Summary Worksheet

The Composition Summary worksheet provides a summary of workforce composition for a top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

Show me my workforce full-time equivalents for each organization in a Business Group.

What is the workforce headcount for a specific organization and its subordinates, for a specific organization hierarchy version?

Show me the total workforce full-time equivalents in my Business Group.

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Composition by Location Worksheet

The Composition by Location worksheet provides a summary of person head count or full-time equivalent, by location, for a specified top-level employing organization for the period of time you specify in the worksheet parameters. The worksheet includes all workforce composition data collected within that period.

Business Questions

What is the composition of my workforce at each location of my enterprise, over time?

Parameters

You must specify values for the following parameters:

- Composition Start
- Composition End

Organization Changes Worksheet

The Organization Changes worksheet provides a summary of the headcount or full time equivalent for employees changing organizations within a specified calendar year. Initially only the top-level employing organizations are displayed; you need to drill down to see transfers between organizations further down the organizational hierarchy.

The worksheet uses a grid to represent organization changes for an employee; organization transferred from appears on the left, and organization transferred to appears across the top.

The worksheet excludes new hires to your enterprise, since new hires have not changed organization.

Business Questions

How many transfers have occurred over the past 12 months?

Parameters

This worksheet uses no parameters.

Separation by Organization Worksheet

The Separation by Organization worksheet provides a summary of person head count or full-time equivalent by top-level employing organization.

Business Questions

How many separations (headcount or full-time equivalent) have occurred in each of my organizations over the past 12 months, by month?

Show me my total losses for this year, for each organization in a particular hierarchy.

Parameters

This worksheet uses no parameters.

Voluntary/Involuntary Separation Worksheet

The Voluntary/Involuntary Separation worksheet provides a summary of person head count or full-time equivalent for a selected top-level employing organization by loss type (voluntary or involuntary) for the last 3 years and the current year.

Business Questions

What is the ratio of voluntary to involuntary terminations month-by-month and year-by-year?

Parameters

This worksheet uses no parameters.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Separation Analysis Workbook (EDW)

The Workforce Separation workbook is designed to give you detailed analysis of the employees leaving your workforce.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Separation by Organization, page 8-51
- Separation Reasons by Organization, page 8-51
- Separation by Period of Service, page 8-52
- Separation by Period of Service and Reason, page 8-52
- Voluntary/Involuntary Separation, page 8-53
- Separation by Age Band, page 8-53
- Separation by Disabled Status, page 8-54
- Separation by Gender, page 8-54
- Separation Reasons by Age Band, Disability Status, and Gender, page 8-54

Separation by Organization Worksheet

The Separation by Organization worksheet provides a summary of person head count or full-time equivalent by top-level employing organization.

Business Questions

How many separations (headcount or full-time equivalent) have occurred in each of my organizations over the past 12 months, by month?

Show me my total losses for this year, for each organization in a particular hierarchy.

Parameters

This worksheet uses no parameters.

Separation Reasons by Organization Worksheet

The Separation Reasons by Organization worksheet provides a summary of person head count or full-time equivalent for a selected top-level employing organization, by separation type (voluntary or involuntary) and separation reason (for example, by disability, poor performance, or end of contract).

Business Questions

What is the breakdown of the separations (headcount or full-time equivalent) by reason?

What are the main reasons given by people for separating, and how do the reasons compare to last year?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Period of Service Worksheet

The Separation by Period of Service worksheet provides a summary of person head count or full-time equivalent by period of service for a selected top-level employing organization.

Business Questions

What are the separations by period of service band?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Period of Service and Reason Worksheet

The Separation by Period of Service and Reason worksheet provides a summary of person head count or full-time equivalent by period of service and separation reason for a selected top-level employing organization and calendar year (based on the year separation occurred).

Business Questions

What are the separations by period of service band?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Voluntary/Involuntary Separation Worksheet

The Voluntary/Involuntary Separation worksheet provides a summary of person head count or full-time equivalent for a specified top-level employing organization by voluntary or involuntary separation type.

Business Questions

What is the ratio of voluntary to involuntary terminations, month-by-month and year-by-year?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Age Band Worksheet

The Separation by Age band worksheet provides a summary of person head count or full-time equivalent by employee age band for a selected top-level employing organization.

Business Questions

How do the number of separations compare across age groups?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Disabled Status Worksheet

The Separation by Disabled Status worksheet provides a summary of person head count or full-time equivalent by disability status (disabled, not disabled, or undefined) for a selected top-level employing organization.

Business Questions

How many separations are in a known minority group (disability status)?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation by Gender Worksheet

The Separation by Gender worksheet provides a summary of person head count or full-time equivalent by gender for a selected top-level employing organization.

Business Questions

How many separations are in a known minority group (gender)?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Separation Reasons by Age Band, Disability Status, and Gender Worksheet

The Separation Reasons by Age Band, Disability Status, and Gender worksheet provides a summary of person head count or full-time equivalent by separation reason for a selected top-level employing organization, by age band, disability status, or gender.

Business Questions

How many separations are in known minority groups (age, gender, disability status)?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Vacancy Start to Hire column, and calculates the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Employee Count KPI Status PMV Report

The Employee Count KPI Status PMV report provides a view of the HRI Employee Count Status KPI data.

See: HRI Employee Count Status KPI, page 8-55

Report Parameters

You must specify values for the following parameters:

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

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

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

HRI Employee Count Status KPI

Use the HRI Employee Count Status KPI to notify a particular responsibility when employee levels are below or above your budgeted level.

For example, you can set up the target Employee Count of 50 Full-time Equivalent (FTE), and the below target of 10% and above target of 20% in the notification range. The application notifies the selected responsibility when the FTE falls below 45 or rises above 60, using the Employee Count KPI Status PMV report .

Business Questions

Tell me when the number of my employees rises or falls outside of my budget level.

KPI Parameters

The HRI Employee Count Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Workforce Measurement Type

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the budget measurement value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and Full-Time Equivalent (FTE).

For more information, see *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments that are:

- Active on the KPI execution date.
- For the organization defined by the HR Organization parameter.

Related Topics

Employee Count KPI Status PMV Report, page 8-55

Employee Count with Job Category KPI Status PMV Report

The Employee Count with Job Category KPI Status PMV report provides a view of the HRI Employee Count with Job Category Status KPI data.

See: HRI Employee Count with Job Category Status KPI, page 8-57

Report Parameters

You must specify values for the following parameters:

- Organization
- Job Category
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

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

- Area/Country/Region/Location
- Grade
- Position

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

HRI Employee Count with Job Category Status KPI

Use the HRI Employee Count with Job Category Status KPI to notify a particular responsibility when employee levels in a job category are below or above your budgeted level.

For example, you can set up the target employee count in a job category of 50 Full-time Equivalent (FTE), and the below target of 10% and above target of 20% in the notification range. The application notifies the selected responsibility when the FTE in a job category falls below 45 or rises above 60.

Business Questions

Tell me when the number of my employees for a specific job category rises or falls outside of my budget level.

KPI Parameters

The HRI Employee Count with Job Category Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category
- Workforce Measurement Type

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the budget measurement value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and Full-Time Equivalent (FTE).

For more information, see *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments that are:

- Active on the KPI execution date.
- For the organization defined by the HR Organization parameter.
- For the job category specified by the Job Category parameter.

Related Topics

Employee Count with Job Category KPI Status PMV Report, page 8-56

Employee Separation KPI Status PMV Report

The Employee Separation Status KPI PMV report provides a view of the HRI Employee Separation Status KPI data.

See: HRI Employee Separation Status KPI, page 8-58

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

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

- Area/Country/Region/Location
- Job
- Grade
- Position
- Separation Category
- Separation Reason

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

HRI Employee Separation Status KPI

Use the HRI Employee Separation Status KPI to notify a particular responsibility when the number of employees leaving your organization exceeds the predefined target levels.

For example, you can notify all users with a management responsibility when employee separation rises above 75%.

Business Questions

Tell me when the number of employees leaving my organization rises above my target level.

KPI Parameters

The HRI Employee Count Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Workforce Measurement Type
- From Date

- To Date

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the budget measurement value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and Full-time Equivalent (FTE).

For more information, see *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments as separated that are:

- Linked to an employee who has left your enterprise.
- Not transferred to a different organization, suspended, or ended.
- Active at the beginning of the time period defined by the time dimension, but not active at the end of the time period.
- For the organization defined by the HR Organization parameter.

Related Topics

Employee Separation KPI Status PMV Report, page 8-58

Workforce Separation by Rolling Month – Status KPI PMV Report

The Workforce Separation by Rolling Month – Status KPI PMV report provides a view of the HRI Workforce Separation Full Time Equivalent by Rolling Month KPI, and the HRI Workforce Separation Headcount by Rolling Month KPI data. It includes target and actual values.

See: HRI Workforce Separation Full Time Equivalent by Rolling Month KPI, page 8-60 and HRI Workforce Separation Headcount by Rolling Month KPI, page 8-60

Report Parameters

You must specify values for the following parameters:

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

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

- Location
- Job
- Grade
- Position
- Separation Category
- Separation Reason

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

HRI Workforce Separation Full Time Equivalent by Rolling Month KPI

This KPI reports on the number of separations by FTE from your organization in the previous rolling month.

Business Questions

Tell me when my workforce separation, by FTE, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Separation Full Time Equivalent by Rolling Month KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Separation Category, or Total Workforce Activity Type (depending on which predefined KPI level you select)

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Full Time Equivalent (FTE).

For more information, see *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments as separated that are:

- Linked to an employee who has left your enterprise.
- Not transferred to a different organization, suspended, or ended.
- Active at the beginning of the time period defined by the time dimension, but not active at the end of the time period.
- For the organization defined by the HR Organization parameter.
- For the separation category defined by the separation category parameter, or for the total workforce activity type defined by the total workforce activity type parameter, depending on which predefined KPI level you select.

Related Topics

Workforce Separation by Rolling Month – Status KPI PMV Report, page 8-59

HRI Workforce Separation Headcount by Rolling Month KPI

This KPI reports on the number of separations by headcount from your organization in the previous rolling month.

Business Questions

Tell me when my workforce separation, by headcount, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Separation Headcount by Rolling Month KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Separation Category, or Total Workforce Activity Type (depending on which predefined KPI level you select)

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Headcount.

For more information, see *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments as separated that are:

- Linked to an employee who has left your enterprise.
- Not transferred to a different organization, suspended, or ended.
- Active at the beginning of the time period defined by the time dimension, but not active at the end of the time period.
- For the organization defined by the HR Organization parameter.
- For the separation category defined by the separation category parameter, or for the total workforce activity type defined by the total workforce activity type parameter, depending on which predefined KPI level you select.

Related Topics

Workforce Separation by Rolling Month – Status KPI PMV Report, page 8-59

Employee Separation with Job Category KPI Status PMV Report

The Employee Separation with Job Category KPI Status PMV report provides a view of the HRI Employee Separation with Job Category Status KPI data.

See: HRI Employee Separation with Job Category Status KPI, page 8-62

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Job Category

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

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

- Area/Country/Region/Location
- Grade
- Position
- Separation Category
- Separation Reason

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

HRI Employee Separation with Job Category Status KPI

Use the HRI Employee Separation with Job Category Status KPI to notify a particular responsibility when the number of employees in a job category leaving your organization exceeds the predefined target levels.

For example, you can notify all users with a management responsibility when employee separation for a job category rises above 75%.

Business Questions

Tell me when the number of employees leaving a specific job category in my organization rises above my target level.

KPI Parameters

The HRI Employee Count Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category
- Workforce Measurement Type
- From Date
- To Date

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the budget measurement value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and Full-time Equivalent (FTE).

For more information, see Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts employee assignments as separated that are:

- Linked to an employee who has left your enterprise.
- Not transferred to a different organization, suspended, or ended.
- Active at the beginning of the time period defined by the time dimension, but not active at the end of the time period.
- For the organization defined by the HR Organization parameter.

Related Topics

Employee Separation with Job Category KPI Status PMV Report, page 8-61

Workforce Count KPI Status PMV Report

The Workforce Count KPI Status PMV report provides you with a view of the HRI Workforce Headcount KPI data, including target and actual values.

See: HRI Workforce Headcount KPI, page 8-63

Report Parameters

You must specify values for the following parameters:

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

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

- Location
- Job
- Grade
- Position

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

HRI Workforce Headcount KPI

This KPI reports on the size of your workforce.

Business Questions

Tell me when my workforce, by head count, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Headcount KPI includes the following mandatory parameters:

- Business Plan

- HR Organization

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Headcount.

For more information, see *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts assignments that are for the organization defined by the HR Organization parameter.

Related Topics

Workforce Count KPI Status PMV Report, page 8-63

Workforce Count Status (Job Category) KPI PMV Report

The Workforce Count Status (Job Category) KPI PMV report provides you with a view of the HRI Workforce Full Time Equivalent (Job Category) KPI data, and the HRI Workforce Head Count (Job Category) KPI data including target and actual values.

See: HRI Workforce Full Time Equivalent (Job Category) KPI, page 8-64

See: HRI Workforce Head Count (Job Category) KPI, page 8-65

Report Parameters

You must specify values for the following parameters:

- Organization
- Job Category
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

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

- Area/Country/Region/Location
- Grade
- Position

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

HRI Workforce Full Time Equivalent (Job Category) KPI

This KPI reports on the size of your workforce (FTE) within specific job categories

Business Questions

Tell me when my workforce for a job category, by FTE, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Full Time Equivalent (Job Category) KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Full Time Equivalent (FTE).

For more information, see *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts assignments that are:

- For the organization defined by the HR Organization parameter.
- For the job category defined by the Job Category parameter.

Related Topics

Workforce Count Status (Job Category) KPI PMV Report, page 8-64

HRI Workforce Head Count (Job Category) KPI

This KPI reports on the size of your workforce (Head Count) within specific job categories.

Business Questions

Tell me when my workforce for a job category, by head count, is outside a target range for an organization.

KPI Parameters

The HRI Workforce Headcount KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category

Target Comparisons

The KPI uses assignments to calculate the actual number of people in the workforce. It calculates the worth of an assignment by using the predefined Oracle FastFormula for Headcount.

For more information, see *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

The KPI only counts assignments that are:

- For the organization defined by the HR Organization parameter.
- For the job category defined by the Job Category parameter.

Related Topics

Workforce Count Status (Job Category) KPI PMV Report, page 8-64

Separations By Competency Report

Run this report from the Separations by Leaving Reason report.

When employees leave your enterprise you lose the competencies they possess. This can become a problem if you continue to lose people with the same abilities. This report investigates the competencies and levels of proficiency you are losing.

This report only includes workforce that has left your enterprise. It does not include workforce that has transferred to a different area of your enterprise or assignments that have been ended or suspended.

This report displays information for the specific time period for which you ran the Separations By Leaving Reason report. The Separations By Leaving Reason report retrieves the time period from the Workforce Losses report.

Business Questions

What competencies have I lost due to separation?

Report Parameters

This report has no parameters.

Key Concepts

This report takes the Amount Lost from the budget value of the assignment. It gives each competence the same budget values as the assignment.

Therefore if an employee had a budget value of 2 and had the planning and teamwork competencies, each competence has a budget value of 2.

The report calculates the total losses by considering all employees who have the same competence and have left. For example, if two employees have teamwork as a competence, they are shown in the same bar of the graph. Each competence is then divided into the different levels of competencies you have lost.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Separations By Leaving Reason Report

Run this report from the Workforce Losses report.

This report enables you to investigate the different reasons why your enterprise is losing workforce. It only includes the workforce that has left your enterprise. It does not include workforce that has transferred to a different area of your enterprise or assignments that have ended or been suspended.

The report is run for the specific time period you selected in the Workforce Losses report.

If you want to investigate the relationship between how long employees stay with your enterprise and their reason for leaving, use the related Separations by Service Band report.

If you want to investigate proficiency levels for the types of competencies you are losing, use the Separations by Competence report.

Business Questions

Why are employees leaving the enterprise?

Report Parameters

This report has no parameters.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Separations By Service Bands Report

Run this report from the Separations by Leaving Reason report.

This report investigates the relationship between the reasons people give for leaving and the amount of time they have been with your enterprise.

This report only includes workforce that has left your enterprise. It does not include workforce that has transferred to a different area of your enterprise or assignments that have been ended or suspended.

Note: When you run this report, you are running it from the Separations By Leaving Reason report. The information this report displays is based on this report, not the original Workforce Summary report. For example, the report displays information for the time period you specified for the Separations By Leaving Reason report.

Business Questions

Why are employees leaving the enterprise and is the reason related to period of service?

Report Parameters

This report has no parameters.

Key Concepts

The report measures the losses and gains for the service bands by the length of employment in the enterprise, not the length of employment in the organization.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Separations Trend Reports

Run these reports from the Workforce Losses report.

Both of the Separations Trend reports include people who have left your enterprise. They do not include workforce that has transferred to a different area of your enterprise or assignments that have been ended or suspended.

Both reports run for the specific time period you selected in the Workforce Losses report.

Separations Trend By Leaving Reason Report

Use this report to investigate the trends in why people are leaving your enterprise.

Separations Trend By Service Band Report

Use this report to investigate the trends in the length of time employees remain with your enterprise.

Business Questions

Why are employees leaving the enterprise and how does that vary over time?

What is the composition of those leaving and how does the composition change over time?

Report Parameters

These reports have no parameters.

Key Concepts

The Separations Trend by Service Band report measures losses and gains for the service bands by the length of employment in the enterprise, not the length of employment in the organization.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Comparison Report

The workforce assigned to different types of jobs can vary over time. This report compares the workforce assigned to up to three job categories over time. For example, you can compare the number of managers against the number of technical staff you employed last year.

To investigate the percentage of employees for different job categories rather than the absolute amount, run the related Workforce Ratio report from this report.

Click on the time period to compare the workforce for a specific time period.

Business Questions

How does the head count or full-time equivalent of groups of employees change over time and how do the groups compare with each other?

Report Parameters

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

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job Category 1
- Job Category 2
- Job Category 3
- Grade
- Budget Measurement Type
- Frequency
- Reporting Dates

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Gains Report

Run this report from the Workforce Summary Analysis report.

Organizations within your enterprise may be gaining workforce for different reasons. This report investigates whether workforce is increasing because:

- New employees are being hired by your enterprise.
- Existing employees are being given new assignments in different parts of your enterprise.
- Existing employees are transferring assignments to different parts of your enterprise.
- Employees' assignments are being re-activated from suspended to active.

Click on a particular time period to investigate the gains made month by month.

Business Questions

How many people are joining my organization over time?

Report Parameters

This report has no parameters.

Headings and Calculations

The Workforce Gains report shows the following types of gains:

- **New Hires**

New employees who have started to work for your enterprise.

- **New Assignments**

New assignments created for employees who already work for your enterprise. The start date of the assignment is not the same as the start date of the employee.

- **Transfer In**

Existing employee assignments that transfer into the reporting organization or organizations from an organization outside the scope of the report.

- **Re-activated**

Assignments in which the status has changed from Suspended to Active. For example, when an employee has returned after a sabbatical.

The last change of assignment before the end of each frequency period determines the category in which an employee is included. For example, if in a monthly frequency period, an employee is hired, transferred out of the organization or organizations, and then transferred in again, the employee would be in the Transfer In category.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Losses Report

Run this report from the Workforce Summary Analysis report.

This report investigates the different reasons you are losing workforce within your enterprise.

Click on a time period to run the Losses report for a specific time period and see the losses made month by month.

Click in the Separated column to run the Separations By Leaving Reason report and investigate the reasons for workforce leaving your enterprise.

You can also access the following related reports:

- **Separations Trend by Leaving Reason report**

This report investigates the trends in reasons for workforce leaving your enterprise.

- **Separations Trend By Service Band report**

This report investigates the time periods for which your workforce was employed before leaving your enterprise.

Business Questions

Am I losing workforce because workforce is transferring to different parts of my enterprise, current employee assignments are ending, employee assignments are being suspended, or because employees are leaving my enterprise?

Report Parameters

This report has no parameters.

Headings and Calculations

The Workforce Losses report shows the following types of losses:

- **Separations**

Employees who have finished working for any part of your enterprise.

- **Ended Assignments**

Assignments that are no longer active or suspended, but the employee is still with your enterprise.

- **Transfer Out**

Employees and assignments that have transferred to an organization outside the scope of the report.

- **Suspended**

The employee status has changed from Active to Suspended. For example, an employee has taken maternity leave.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Ratio Report

The workforce assigned to different types of jobs can vary over time. This report compares the percentage of workforce assigned to up to three job categories over time. For example, you could compare the percentage of managers against the percentage of technical staff you employed last year.

If you want to investigate the absolute number of employees for different job categories rather than the percentage of employees, you can run the related Workforce Comparison report from this report.

Click on the time period to compare the workforce for a specific time period.

Business Questions

How does the head count or full-time equivalent of groups of employees change over time and how do the groups compare with each other?

Report Parameters

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

- Organization
- Rollup Organizations (Yes/No)
- Location
- Job Category 1
- Job Category 2
- Job Category 3
- Grade
- Budget Measurement Type
- Frequency
- Reporting Dates

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Workforce Summary Analysis Report

This report is the first in a suite of reports that enables you to investigate workforce in your enterprise. You can review the losses, gains and total workforce you have in different organizations within your enterprise.

You can run the Workforce Summary Analysis report for each organization. If you select Yes in the Rollup Each Organization parameter, the report will use the selected organization, and all its subordinates. If you select No in the Rollup Each Organization parameter, the report will use the selected organization, and does not include its subordinates.

Within the report, you can investigate:

- Monthly breakdowns of the workforce, by clicking on a specific time period.
- The different gains in workforce, by clicking on the report column heading Gains. This action runs the Workforce Gains report.
- The different losses in workforce, by clicking on the report column heading Losses. This action runs the Workforce Losses report.

Business Questions

How is my workforce changing over time?

Report Parameters

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

- Organization
- Rollup Organization?
- Business Plan
- Area / Country / Region

- Country
- Region
- Product Category
- Job Category
- Job
- Budget Measurement Type
- View By
- Frequency
- Reporting Dates

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Organization Separation Report

This report investigates the performance of your best and worst organizations based on the workforce separation. This can be an absolute figure or a percentage of the workforce for the organization.

Click on the organization name in the table to investigate the workforce changes for an organization.

Business Questions

How many people are leaving my organizations?

Report Parameters

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

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

When considering performance, you can select to display the top organizations; these are the organizations with the greatest increase or least decrease in Workforce. Alternatively, you can select the bottom organizations; these are the organizations with the lowest increase or greatest decrease in Workforce.

- Order By
- Reporting Dates

You can investigate up to 99 organizations in a section of your enterprise. This gives you the ability to consider the best 10 performers in a small section of your enterprise, or the worst 50 performers in a larger section of your enterprise.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 8-2

Annualized Employee 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 HRI: Workforce in Period 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 1-30
- Period, page 1-33
- Manager, page 1-32

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:

$$\frac{(\text{Total involuntary turnover this reporting period} - \text{Total involuntary turnover preceding reporting period}) * 100}{(\text{Total involuntary turnover preceding reporting period})}$$
- 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:

$$\frac{(\text{Total turnover this reporting period} - \text{Total turnover preceding reporting period}) * 100}{(\text{Total turnover preceding reporting period})}$$

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.
- Employee Turnover Detail, page 8-91 available from the Terminations (Voluntary, Involuntary, and Total) column values.
- Employee Detail report , page 3-21 available from Direct Reports.

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 1-30
- Period, page 1-33
- Manager, page 1-32
- View By - Time, page 1-38

Reports and Links

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

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 1-30
- Period, page 1-33
- Manager, page 1-32
- View By - Time, page 1-38

Calculations

This report uses the following calculations:

- Turnover, page 1-21

Annualized Employee 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 HRI: Workforce in Period 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29

Calculations

This report includes the following calculations:

- Manager, page Glossary-19
- Terminations (Voluntary and Involuntary), page 1-20
- 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 8-94 available from the Manager column values.

Annualized Employee Turnover Trend

The Annualized Employee 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- View By -Time, page 1-38

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 1-21

Reports and Links

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

Employee 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 a list of all the direct reports of the selected manager who manage a headcount more than zero. A separate row called 'Direct Reports' summarizes the details about the employees who report directly to the selected manager.

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 1-18

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:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32

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 employee headcount at the start of the reporting period.
- Hire (Plus): The total headcount of employees hired over the reporting period.
- Transfer (Plus): The total headcount of employees transferred in during the reporting period.
- Transfer (Minus): The total headcount of employees transferred out during the reporting period.
- Termination (Minus): The total headcount of employees who have separated from the selected manager during the reporting period.
- End Headcount: The total headcount of employees 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:

- Employee Hire Detail report , page 8-80 available from the Plus-Hire column values.
- Employee Transfer (Plus) Detail report , page 8-85 available from the Plus-Transfer column values.
- Employee Termination Detail report , page 8-86 available from the Minus-Termination column values.
- Employee Transfer (Minus) Detail report , page 8-84 available from the Minus-Transfer column values.
- Employee Detail report , page 3-21 available from Direct Reports.

Employees 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- View By - Time, page 1-38

Reports and Links

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

Employee 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 1-30
- Period, page 1-33
- Manager, page 1-32
- Staff, page 1-35

Headings

This report includes the following headings:

- Name: The employee's name.
- Manager, page Glossary-19
- Department, page Glossary-11
- Country: The employee's country, based on the assignment location.

- Job: The employee's job title.
- Hire Date: The employment start date.

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Employee Ratio by Length of Service Trend

The Employee 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: $(\text{Headcount for the Manager} / \text{Length of Service}) / \text{Total Headcount for the Manager}$.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- View By - Time, page 1-38

Calculations

This report uses the following calculations:

- Length of Service, page 1-22

Reports and Links

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

Employee Ratio by Performance Band Trend

The Employee 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 1-17

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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- View By - Time, page 1-38

Reports and Links

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

Employee Ratio with Length of Service Status

The Employee Ratio with Length of Service Status 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 1-30
- Period, page 1-33
- Manager, page 1-32
- Country, page 1-29
- Job Function, page 1-31
- Job Family, page 1-30
- Performance Band, page 1-33
- View By:
 - Country, page 1-37
 - Job Function, page 1-37

- Job Family, page 1-37
- Manager, page 1-38
- Performance Band, page 1-38

Calculations

This report uses the following calculations:

- Headcount, page 1-17
- Length of Service, page 1-22

Reports and Links

- You can access Employee Detail report , page 3-21 available from the Headcount (Length of Service) and Direct Report column values.
- Drill/Pivot reports: Depending on the parameters you select, these reports include the details about countries, job functions, job families, or performance 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*

Employee Ratio with Performance Band Status

The Employee 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 1-17. 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 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 1-30
- Period, page 1-33
- Manager, page 1-32
- Country, page 1-29
- Job Function, page 1-31

- Job Family, page 1-30
- Length of Service Band, page 1-32
- View By:
 - Country, page 1-37
 - Job Function, page 1-37
 - Job Family, page 1-37
 - Length of Service Band, page 1-37
 - Manager, page 1-38

Calculations

This report uses the following calculations:

- Headcount (High, Mid, Low, Not Rated), Headcount Ratio and Total Headcount, page 1-17

Reports and Links

- Drill/Pivot reports: Depending on the parameters you select, these reports include the details about countries, job functions, job families, 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*
- You can access Employee Detail report, page 3-21 available from the Headcount (High, Mid, Low, and Not Rated), and Direct Report column values.

Employee Transfer (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 1-30
- Period, page 1-33
- Manager, page 1-32
- Staff, page 1-35

Headings and Calculations

This report uses the following headings and calculations:

- Name: The employee's name.

- **Manager:** The employee's previous manager. For more information, see: Manager, page Glossary-19
- **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 current country, based on the assignment location.
- **Job:** The employee's current job title.
- **Transfer Date:** The last day of the reporting to the current manager.
- **Length of Service (Years),** page 1-22
- **Performance Band,** page 1-33

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: Link to HR Employee Directory , *Daily Business Intelligence for HRMS Implementation Guide*

Employee Transfer (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 1-30
- **Period,** page 1-33
- **Manager,** page 1-32
- **Staff,** page 1-35

Headings

The report uses the following headings:

- **Name:** The employee's name.
- **Manager:** The employee's current manager. For more information, see: Manager, page Glossary-19
- **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 current country, based on the assignment location.
- Job: The employee's current job title.
- Transfer Date: Transfer date of an employee.

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Employee 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 1-33
- Manager, page 1-32
- Staff, page 1-35

Headings and Calculations

This report uses the following headings and calculations:

- Name: The employee's name.
- Manager, page Glossary-19
- Department, page Glossary-11
- Country: The employee's country, based on the assignment location.
- Job: The employee's job title
- Termination Date, page Glossary-32 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 1-33

- Length of Service (Years), page 1-22

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: Link to HR Employee Directory , *Daily Business Intelligence for HRMS Implementation Guide*

Employee Summary Status

The Employee 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Currency, page 1-29
- Area, page 1-27
- Country, page 1-29
- Job Function, page 1-31
- Job Family, page 1-30
- Length of Service Band, page 1-32
- Performance Band, page 1-33
- Termination Category, page 1-36
- Leaving Reason, page 1-31

- View By, page 1-36

Headings and Calculations

This report uses the following headings and calculations:

- Manager, page Glossary-19
- Employees, page 1-17
- Salary, page 1-23
- Annualized Turnover, page 1-21

Related Reports and Links

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

- Employee Summary Status (for a specific manager): available from the Manager column values.
- Employee Detail report , page 3-21 available from the Total (Headcount) column values and Direct Reports.
- Employee Turnover Detail report , page 8-91 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 area, 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*.

Employee Termination Status

The Employee 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Country, page 1-29
- Area, page 1-27
- Job Function, page 1-31

- Job Family, page 1-30
- Length of Service Band, page 1-32
- Performance Band, page 1-33
- Termination Category, page 1-36
- Leaving Reason, page 1-31
- View By, page 1-36
 - Manager, page 1-38
 - Area, page 1-37
 - Country, page 1-37
 - Job Function, page 1-37
 - Job Family, page 1-37
 - Performance Band, page 1-38
 - Length of Service Band, page 1-37
 - Leaving Reason, page 1-37

Calculations

This report uses the following calculations:

- Manager, page Glossary-19
- Termination, page 1-20

Reports and Links

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

- Employee Turnover Detail report, page 8-91 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 area, 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*.

Employee Terminations by Job Functions

The Employee Terminations by 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 1-30
- Period, page 1-33
- Manager, page 1-32
- Currency, page 1-29
- Staff, page 1-35
- Separation Category, page 1-36
- View By - Job Function, page 1-37

Calculations

This report uses the following calculations:

- Termination, page 1-20

Reports and Links

You can access Employee Turnover Detail report, page 8-91 available from the pie chart segments and the Terminations values.

Employee 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: (Total termination for a particular period of service band / 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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Country, page 1-29
- Job Function, page 1-31

- Job Family, page 1-30
- Performance Band, page 1-33
- View By:
 - Country, page 1-37
 - Job Function, page 1-37
 - Job Family, page 1-37
 - Manager, page 1-38
 - Performance Band, page 1-38

Calculations

This report uses the following calculations:

- Length of Service (Amount and Ratio) , page 1-22
- Total Terminations, page 1-20

Reports and Links

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

- Employee Terminations with Length of Service Status (for a specific manager): available from the Manager column values.
- Employee Turnover Detail report, page 8-91 available from the Amount column values of the different length of service bands.
- Employee Detail report , page 3-21 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*.

Employee 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 1-33
- Manager, page 1-32
- Staff, page 1-35
- Area, page 1-27
- Country, page 1-29

- Job Function, page 1-31
- Job Family, page 1-30
- Length of Service Band, page 1-32
- Performance Band, page 1-33
- Termination Category, page 1-36
- Leaving Reason, page 1-31

Headings and Calculations

This report uses the following headings and calculations:

- Manager, page Glossary-19
- Department, page Glossary-11
- Job: The employee's job title.
- Hire Date, page Glossary-16
- Termination Date, page Glossary-32
- Termination Reason: The employee's leaving reason.
- Length of Service (Years), page 1-22
- Performance Band, page 1-33

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Employee Turnover Ratio by Performance Band Trend

The Employee Turnover Ratio by Performance Band Trend 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 1-30

- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- View By - Time, page 1-38

Reports and Links

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

- Drill Reports available from the Time column values.

Employee Turnover Ratio with Performance Band Status

Use the Employee 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 selected 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 1-30
- Period, page 1-33
- Manager, page 1-32
- Country, page 1-29
- Job Function, page 1-31
- Job Family, page 1-30
- Length of Service Band, page 1-32
- View By:
 - Country, page 1-37
 - Job Function, page 1-37
 - Job Family, page 1-37
 - Length of Service Band, page 1-37
 - Manager, page 1-38

Calculations

This report uses the following calculations:

- Termination (Performance Bands and Not Rated) and Total Terminations, page 1-20

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.
- Employee Turnover Detail report, page 8-91 available from the Terminations column values.
- Employee Detail report , page 3-21 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*.

Employee Turnover Summary Status

The Employee 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 1-17

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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- Area, page 1-27
- Country, page 1-29
- Job Function, page 1-31
- Job Family, page 1-30
- Length of Service Band, page 1-32
- Performance Band, page 1-33
- View By:
 - Area, page 1-37
 - Country, page 1-37
 - Job Function, page 1-37

- Job Family, page 1-37
- Length of Service Band, page 1-37
- Manager, page 1-38
- Performance Band, page 1-38

Calculations

This report uses the following calculations:

- Employee , page 1-17
- Termination, page 1-20
- Annualized Turnover, page 1-21

Reports and Links

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

- Employee Turnover Summary Status (for a specific manager) available from the Manager column values.
- Employee Turnover Detail report, page 8-91 available from the Terminations (Voluntary), Terminations (Involuntary), and Terminations (Total) column values.
- Employee Detail report , page 3-21 available from Direct Reports.
- Drill/Pivot reports: Depending on the parameters you select, these reports include the details about areas, 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*.

Employee Voluntary Terminations

The Employee Voluntary Terminations 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 1-30
- Period, page 1-33
- Manager, page 1-32
- View By - Leaving Reason, page 1-37

Calculations

This report uses the following calculations:

- Terminations, page 1-20

Reports and Links

- Employee Turnover Detail report, page 8-91 available from the Terminations column values and the pie chart segments.

HR Staff Ratio by Country

The HR Staff Ratio by Country report tracks the ratio of HR personnel to workers in your enterprise by country.

The report displays the list of countries ranked by total headcount for all assignments at the effective date in the hierarchy of the chief HR officer specified in the HRI: DBI Chief HR Officer Named User profile option. The Unassigned row displays assignments at the effective date that are not associated with a country.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28

Calculations

This report includes the following calculations:

- Total Workforce: calculates the total headcount for both employees and contingent workers for each selected country for the enterprise.
- HR Workforce: calculates the total HR headcount for both employees and contingent workers for each selected country for the enterprise at the effective date.
- Ratio (1:N): calculates ratio as Total workforce/ HR workforce
- Change: calculates the change in the ratio of the workforce from the prior period or prior year depending on the Compare To parameter.

Reports and Links

You can access the HR Ratio Detail , page 8-96 report from the HR Workforce column values.

HR Ratio Detail

Use this report to view the details of HR employees such as name, current manager, assignment location, and job.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Country, page 1-29

Headings

This report includes the following headings:

- Name: The employee's name.
- Manager, page Glossary-19
- Department, page Glossary-11
- Country: The employee's country, based on the assignment location.
- Job: The employee's job title.

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Contingent Worker Trend

Use the Contingent Worker Trend report to see how the contingent workforce has changed over time for the selected manager. The report calculates the headcount for contingent worker assignments at each data point for assignments reporting to the manager.

Report Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- View By -Time, page 1-38

Calculations

This report includes the following calculations:

- Total: The total percentage of headcount turnover.

Reports and Links

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

Contingent Worker Activity by Manager Status

Use this report to find the total contingent worker 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 contingent worker assignments in the manager's hierarchy.

The report displays a list of all the direct reports of the selected manager who manage a headcount more than zero. A separate row called 'Direct Reports' summarizes the details about the workers who report directly to the selected manager.

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 manager. The application calculates percentage 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 $\text{Start Headcount} + \text{Placements and Transfers (Plus)} - \text{end Placements and Transfers (Minus)}$.

The Place, Transfer (plus), End 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 1-18

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:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32

Calculations

This report uses the following calculations:

- Start Headcount: Displays the total headcount of contingent workers at the start of the reporting period.

- Place (Plus): The total headcount of contingent workers placed in the reporting period.
- Transfer (Plus): The total headcount of contingent workers transferred in during the reporting period.
- Transfer (Minus): The total headcount of contingent workers transferred out during the reporting period.
- End (Minus): The total headcount of contingent workers whose placements ended during the reporting period.
- End Headcount: The headcount at the end of the reporting period, calculated as:
Start Headcount + Hires and Transfers (Plus) - End Placement 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:

- Contingent Worker Activity by Manager Status report for a specific manager from the Manager column values.
- Contingent Worker Placement Detail report , page 8-103 available from the Plus-Place column values.
- Contingent Worker Transfer (Plus) Detail report , page 8-106 available from the Plus-Transfer column values.
- Contingent Worker End Placement Detail report , page 8-104 available from the Minus-End Place column values.
- Contingent Worker Transfer (Minus) Detail report , page 8-105 available from the Minus-Transfer column values.
- Contingent Worker Detail by Placement End report , page 8-102 available from Direct Reports.

Contingent Worker Ratio with Length of Placement Status

The Contingent Worker Ratio with Length of Placement Status report provides information about the average duration of a contingent worker's period of placement. It displays the ratio of contingent workers in each length of placement band by manager and the selected parameters.

The Headcount Ratio graph displays the percentage headcount ratio for each manager. The list of managers includes the contingent workers 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 contingent workers.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Manager, page 1-32
- Country, page 1-29
- Job Function, page 1-31
- Job Family, page 1-30
- View By:
 - Manager, page 1-38
 - Country, page 1-37
 - Job Function, page 1-37
 - Job Family, page 1-37

Calculations

This report uses the following calculations:

- Headcount, page 1-17
- Length of Placement, page 1-22

Reports and Links

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

- Contingent Worker Ratio with Length of Placement report for a specific manager from the Manager column values.
- Contingent Worker Detail by Placement End , page 8-102 available from the Headcount (Length of Placement) and Direct Report column values.

Length of Placement Trend

Use the Length of Placement report to find the average duration of contingent worker assignments. You can gather information such as the total number of contingent workers whose placement is extended and the duration of their assignment extension. The application calculates the length of placement for contingent worker assignments at each data point for assignments reporting to the selected manager.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32

- View By - Time, page 1-38

Calculations

This report uses the following calculations:

- Initial Placement, page 1-24
- Extension, page 1-24
- Total Placement, page 1-24

Reports and Links

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

Length of Placement Ratio Trend

Use the Length of Placement Ratio trend report to find the average duration of contingent worker assignments' period of placement and how the average changes over time.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- View By - Time, page 1-38

Calculations

This report uses the following calculation:

- Length of Placement, page 1-22

Reports and Links

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

Worker Detail

Use the Worker Detail report to gather information about workers such as name, current manager, country, and job.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30

- Period, page 1-33
- Manager, page 1-32
- Staff, page 1-35

Headings

This report includes the following calculations:

- Name: The worker's name.
- Manager, page Glossary-19
- Department, page Glossary-11
- Country: The worker's country, based on the assignment location.
- Job: The worker's job title.

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Contingent Worker Detail by Placement End

You can access this report from the Direct Reports value in the Manager column in the parent Contingent Worker Activity by Manager Status report. The report displays the contingent worker details and sorts the information by the placement end date.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Manager, page 1-32
- Staff, page 1-35
- Country, page 1-29
- Job Function, page 1-31
- Job Family, page 1-30
- Length of Placement Band, page 1-32

Headings

This report includes the following headings:

- Name: The contingent worker's name.

- Manager, page Glossary-19
- Department, page Glossary-11
- Country: The contingent worker's country, based on the assignment location.
- Job: The contingent worker's job title.
- Length of Placement (Months), page 1-22
- Placement, page Glossary-24
- End Placement, page Glossary-13

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: Link to HR Employee Directory , *Daily Business Intelligence for HRMS Implementation Guide*

Contingent Worker Placement Detail

You access this report from the Plus-Place column in the Contingent Worker Activity by Manager report. You can use this report to view a list of contingent workers whose placement started in the reporting period for the selected manager.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Manager, page 1-32
- Staff, page 1-35

Headings

This report includes the following headings:

- Name: The contingent worker's name.
- Manager, page Glossary-19
- Department, page Glossary-11
- Country: The contingent worker's country, based on the assignment location.
- Job: The contingent worker's job title.
- Placement Date, page Glossary-24

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Contingent Worker End Placement Detail

You access this report from the Minus-End Place column value in the parent Contingent Activity by Manager Status report.

The report displays the contingent worker records that make up the total value that appeared in the Contingent Worker Activity by Manager region. The report lists contingent workers whose placement ended in the reporting period, together with the supporting details.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Manager, page 1-32
- Staff, page 1-35

Headings

This report uses the following headings:

- Name: The contingent worker's name.
- Manager, page Glossary-19
- Department, page Glossary-11
- Country: The employee's country, based on the assignment location.
- Job: The employee's job title.
- Placement Date, page Glossary-24
- End Placement Date, page Glossary-13
- End Placement Reason: The contingent worker's end placement reason.
- Length of Placement (Months), page 1-22

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Contingent Worker Transfer (Minus) Detail

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

The report displays the contingent worker records that make up the total value that appeared in the Contingent Worker Activity by Manager Status report, including reorganizations. The report provides information about contingent workers who have moved out of the selected manager's hierarchy.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Manager, page 1-32
- Staff, page 1-35

Headings

This report uses the following headings:

- Name: The contingent worker's name.
- Manager From: The contingent worker's previous manager.
- Manager To: The contingent worker's current manager.
- Department From: The contingent worker's previous organization, if any.
- Department To: The contingent worker's current organization. Note that the previous and current departments can be the same.
- Country: The contingent worker's country, based on the assignment location.
- Job: The contingent worker's job title.
- Transfer Date: The last day of the reporting to the current manager.
- Length of Placement (Months), page 1-22

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Contingent Worker Transfer (Plus) Detail

You access this report from the Plus-Transfer column in the parent Contingent Worker by Manager report. The report displays the contingent worker records that make up the total value that appeared in the Contingent Worker Activity by Manager report, including reorganizations.

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

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Manager, page 1-32
- Staff, page 1-35

Headings

The report uses the following headings:

- Name: The contingent worker's name.
- Manager: The contingent worker's current manager.
- Department From: The contingent worker's previous organization, if any.
- Department To: The contingent worker's current organization. Note that the previous and current departments can be the same.
- Country: The contingent worker's current country, based on the assignment location.
- Job: The contingent worker's current job title.
- Transfer Date: Transfer date of the contingent worker.

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Workforce Activity by Manager Status

This report helps you find the total worker , page Glossary-34 headcount of the direct reports for the selected manager. The application calculates the start and the end headcount based on the effective date and the reporting period for all the worker assignments in the selected manager's hierarchy.

The report displays a list of all the direct reports of the selected manager who manage a headcount more than zero. A separate row called 'Direct Reports' summarizes the details about the workers who report directly to the selected manager.

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 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 $\text{Start Headcount} + \text{Hires} + \text{Placements and Transfers (Plus)} - \text{Terminations} + \text{End Placements and Transfers (Minus)}$.

The Hire, Place, Transfer (plus), Termination, End Place 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 1-18

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 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32

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 total headcount of workers at the start of the reporting period.
- Hire (Plus): The total headcount of employees hired over the reporting period.
- Place (Plus): The total headcount of contingent workers placed over the reporting period.
- Transfer (Plus): The total headcount of workers transferred in during the reporting period.
- Termination (Minus): The total headcount of employees who have separated from the selected manager during the reporting period.

- **Transfer (Minus):** The total headcount of workers transferred out during the reporting period.
- **End (Minus):** The total headcount of contingent workers whose placement ended during the reporting period.
- **End Headcount:** The total headcount of workers at the end of the reporting period, calculated as:

$$\text{Start Headcount} + \text{Hires and Transfers (Plus)} - \text{End Placement and Transfers (Minus)}$$
- **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:

- Employee Hire Detail report , page 8-80 available from the Plus-Hire column values.
- Contingent Worker Placement Detail report , page 8-103 available from the Plus-Place column values.
- Staff Transfer (Plus) Detail report , page 8-109 available from the Plus-Transfer column values.
- Employee Termination Detail report , page 8-86 available from the Minus-Termination column values.
- Contingent Worker End Placement Detail report , page 8-104 available from the Minus-End Place column values.
- Staff Transfer (Minus) Detail report , page 8-108 available from the Minus-Transfer column values.
- Worker Detail report , page 8-101 available from Direct Reports.

Staff Transfer (Minus) Detail

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

The report displays the worker records that make up the total value that appeared in the Workforce Activity by Manager Status report, including reorganizations. The report provides information about workers who have moved out of the selected manager's hierarchy.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Manager, page 1-32

- Staff, page 1-35

Headings

This report uses the following headings:

- Name: The worker's name.
- Manager From: The worker's previous manager.
- Manager To: The worker's current manager.
- Department From: The worker's previous organization, if any.
- Department To: The worker's current organization. Note that the previous and current departments can be the same.
- Country: The worker's country, based on the assignment location.
- Job: The worker's job title.
- Transfer Date: The last day of the reporting to the current manager.

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Staff Transfer (Plus) Detail

You access this report from the Plus-Transfer column in the parent Workforce Activity by Manager Status report. The report displays the worker, page Glossary-34 records that make up the total value that appeared in the Workforce Activity by Manager Status Manager report, including reorganizations.

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

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Manager, page 1-32
- Staff, page 1-35

Calculations

The report uses the following headings:

- Name: The worker's name.

- **Manager:** The worker's current manager.
- **Department From:** The worker's previous organization, if any.
- **Department To:** The worker's current organization. Note that the previous and current departments can be the same.
- **Country:** The worker's current country, based on the assignment location.
- **Job:** The worker's current job title.
- **Transfer Date:** Transfer date of a worker.

Reports and Links

You can navigate directly to specific worker records in the Self Service HR Employee Directory from the Manager and Name column values and Direct Reports.

Note: You can view the worker's data only if the effective date is the current date.

See: [Link to HR Employee Directory](#) , *Daily Business Intelligence for HRMS Implementation Guide*

Workforce Ratio Trend

Use the Workforce Ratio Trend report to understand the change in the composition of total workforce over time in your enterprise. You can find out the percentage of contingent workers and employees that report to the selected manager.

Parameters

This report uses the following parameters:

- Effective Date, page 1-30
- Period, page 1-33
- Compare To, page 1-28
- Manager, page 1-32
- View By
 - Time, page 1-38
 - Manager, page 1-38

Calculations

This report includes the following calculations:

- **Employee Ratio:** The employee headcount ratio is calculated as:

$$\text{Total employee headcount} / \text{Total workforce headcount (total employee headcount + total contingent worker headcount)}$$
- **Contingent Worker Ratio:** The contingent worker headcount ratio is calculated as:

$$\text{Total contingent worker headcount} / \text{Total workforce headcount}$$

Reports and Links

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

Recruiting and Hiring Intelligence

Recruiting and Hiring Intelligence

Key Concepts for Recruiting and Hiring Intelligence

The following concepts enable you to accurately interpret the results of the Recruiting and Hiring reports.

- Discoverer Workbook Calculations, page 9-2
- Key Concepts for Recruiting and Hiring PMV Reports, page 9-3
 - Budget Measurement Types for KPIs, page 9-3
 - Percentage Recruitment Success, page 9-3
 - Vacancies, page 9-3
 - Filled Vacancies, page 9-3
 - Guidelines for Recruitment Targets, page 9-3

Discoverer Workbook Calculations

The predefined recruiting and hiring workbooks, in addition to displaying information set up within Oracle HRMS, calculate the following:

- **New Applicants**

The number of applicants for the vacancy who have the status of active application.

- **Terminations**

The number of applicants whose applicant assignment has ended, and for whom an employee assignment has not been created.

- **Offers**

The number of applicants that have the status of Offer.

Note: Applicants can have only one status at any time, therefore the number of offers represents offers which have been made and not yet accepted; it does not include offers which have subsequently been accepted.

- **Accepts**

The number of applicants that have the status of Accept.

- **Hired**

The number of applicant assignments that have been converted to employee assignments, regardless of whether the applicant already works for your enterprise.

- **Still Employed**

The number of applicant assignments that have been converted to employee assignments that are currently active.

- **Applicant Age**

The current age of the applicant, not their age when they applied for the vacancy.

Note: Applicants must have a birth date set up to be included in the worksheet. You cannot enter a date of birth on the Applicant Quick Entry window, so you must use the People window to set this up.

- **Days to Fill Vacancy**

The number of days from opening the vacancy until an applicant is hired.

Key Concepts for Recruiting and Hiring PMV Reports

The following concepts affect the Recruiting and Hiring PMV reports.

Budget Measurement Types for KPIs

All predefined KPIs consider only those vacancies which have values set up for the Budget Measurement Type of HEAD for head count, and FTE for Full-time Equivalent.

Note: You set Budget measurement values by using the Lookup type of BUDGET_MEASUREMENT_TYPE on the HRMS Requisition and Vacancy window.

To see the success of your recruitment for all vacancies, you must use the same Budget Measurement Type for all vacancies. For example, use FTE as the Budget Measurement Type for all vacancies.

Percentage Recruitment Success

To compare actual recruitment success against your target, the reports define recruitment success as the percentage of vacancies filled compared to openings.

Vacancies

The reports calculate vacancies by totaling the Budget Measurement Value of the relevant vacancies within the time dimension of the target.

Filled Vacancies

The reports calculate filled vacancies total by totaling the workforce created to fill the vacancies.

The reports calculate workforce by using assignments. They calculate the worth of each assignment by using the Budget Measurement Value or, if a value does not exist, the predefined Oracle FastFormula for Headcount and FTE.

For more information, see: *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

Guidelines for Recruitment Targets

Use the following guidelines when setting up targets for the HRI Recruitment Success (Starts) Status KPI

- **Percentage success**

Enter the target as a percentage of the success you expect. For example, enter 70 if the recruitment success target is 70%.

- **Below Target Values**

Only set up Below Target values in the ranges for each notification responsibility. For example, if you enter 10% in the Below Target field, and the target is 70%, the KPI sends a notification when the recruitment success falls below 63%.

The HRI Recruitment Success (Starts) Status KPI indicates when recruitment falls below the targets level. Do **not** set up Above Target values.

Applicant Time to Start Comparison Workbook

This workbook analyses the days required to fill vacancies within a recruitment activity. It only reports on job applicants that have been hired.

Business Questions

How efficient is my recruitment process?

Worksheets

The workbook contains the following worksheets:

- By Ethnic Group (United States specific)
- By Ethnic Origin (United Kingdom specific)
- By Gender
- By Job
- By Grade
- By Organization
- By Location
- By Vacancy

Workbook Parameters

This workbook does not use parameters.

Workbook Headings and calculations

The workbook uses the following calculation:

Average Days to Fill Vacancy

This calculation provides the Average Days from Vacancy Start to Hire; it is based on the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 9-2

Application Termination Analysis Workbook

This workbook investigates the reasons your enterprise has terminated applications for different vacancies and individual applicants. The workbook only includes terminated applications.

Business Questions

Why are applicants dropping out of the recruitment process?

Worksheets

This workbook contains the following worksheets:

- Termination Details
- Termination Reasons by Vacancy

Workbook Parameters

This workbook does not use parameters.

Workbook Headings and calculations

The workbook does not use any calculations.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 9-2

Applications Analysis Workbook

This workbook investigates the applications for vacancies within your enterprise.

You can investigate the following by vacancy, recruitment, and applicant status:

- Number of openings for a vacancy
- New applicants
- Applications which have been terminated
- Offers to applicants
- Accepted offers
- Number of applicants hired

Parameters

The workbook does not use parameters.

Worksheets

This workbook has the following worksheets:

- Age Analysis, page 9-6
- Applicant Status, page 9-6

- Recruitment Activity Summary, page 9-6
- Vacancy Summary, page 9-6

Age Analysis Worksheet

This worksheet enables you to investigate the current age of applicants for a particular vacancy.

Business Questions

What is the age spread of my applicants?

Worksheet headings and calculations

This worksheet does not use calculations.

Applicant Status Worksheet

This worksheet enables you to investigate the applications that exist for a Business Group, requisition, and recruiter.

Business Questions

What is the status of my applicants?

Worksheet headings and calculations

This worksheet does not use calculations.

Recruitment Activity Summary Worksheet

This worksheet enables you to investigate recruitment activities within your Business Group. You can analyze the current status of recruitment activities, for example, the number of new applicants, the number of offers made, and the number of terminated applicants. You can view recruitment activity information for a Business Group, requisition, vacancy, and recruitment type.

Business Questions

How many applicants are there at each recruitment stage?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires**

Populates the Hires column in the worksheet with the number of applicants that have been hired into the vacancy from the recruitment activity.

Vacancy Summary Worksheet

This worksheet enables you to investigate vacancies within your Business Group. You can analyze the current status of vacancies, for example, the number of remaining applicants, the number of new applicants, and the number of terminated applicants. You

can view vacancy information for a Business Group, recruitment type, and recruitment activity.

Business Questions

How many applicants are there at each recruitment stage?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires**
Populates the Hires column in the worksheet with the number of applicants that have been hired into the vacancy from the recruitment activity.
- **Planned Cost with Currency**
Populates the Planned Cost with Currency page item in the worksheet. It is a concatenation of planned cost and currency code.
- **Actual Cost with Currency**
Populates the Actual Cost with Currency page item in the worksheet. It is a concatenation of actual cost and currency code.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 9-2

Recruitment Efficiency Analysis Workbook

This workbook analyses vacancy ratios, vacancy ratios by recruitment activity, recruitment activity ratios, and hires versus openings summary for recruitment within your enterprise.

Parameters

The workbook does not use parameters.

Worksheets

This workbook has the following worksheets:

- Vacancy Ratios, page 9-7
- Vacancy Ratios by Recruitment Activity, page 9-8
- Recruitment Activity Ratios, page 9-8
- Hires versus Openings Summary, page 9-9

Vacancy Ratios Worksheet

Business Questions

How successful is my recruitment?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Hires/Offers**

Populates the Hires / Offers column with the percentage of hires who are employed as of the system date, against the number of open offers as of the system date.

- **Vacancy/Offers**

Populates the Hires / Openings column with the percentage of vacancy hires, against the number of openings.

- **Hires/Openings**

Populates the Hires / Openings column with the percentage of hires who are employed as of the system date, against the number of initial openings.

- **Vacancy Hires**

Populates the Hires column with the number of applicants who have been made an offer for a vacancy.

Vacancy Ratios by Recruitment Activity Worksheet

Business Questions

How many applicants are there at each recruitment stage?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires/Openings**

Populates the Hires / Openings column with the percentage of recruitment activity hires, against the number of openings.

- **Recruitment Activity Vacancy Offers/Recruitment Activity Vacancy Hires**

Populates the Hires / Opening column with the percentage of hires, against the number of offers made.

- **Recruitment Activity Vacancy Hires** Populates the Hires column with the number of applicants that have been hired into the vacancy from the recruitment activity.

- **Recruitment Activity Vacancy Offers** Populates the Offers column with the number of applicants that have been made offers via the recruitment activity.

- **Cost per Hire**

Populates the Cost per Hire column with the actual cost of recruitment activity divided by the number of successful recruitments using that activity.

Recruitment Activity Ratios Worksheet

Business Questions

How successful is my recruitment?

How much does my recruitment cost?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Hires/Recruitment Activity Offers**

Populates the Hires / Opening column with the percentage of hires, against the number of offers made.

- **Recruitment Activity Offers**Populates the Offers column with the number of offers made from a recruitment activity.

- **Cost per Hire**

Populates the Cost per Hire column with the actual cost of recruitment activity divided by the number of successful recruitments using that activity.

- **Recruitment Activity Hires**Populates the Recruitment Activity Hires column with the number of hires a recruitment activity has achieved.

Hires versus Openings Summary Worksheet

Business Questions

How successful is my recruitment?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires/Openings**

Populates the Hires / Offers column with the percentage of recruitment activity hires, against the number of openings.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 9-2

Vacancy Hire Success (Organization Hierarchy) Status Analytics workbook

The Vacancy Hire Success (Organization Hierarchy) Status Analytics workbook provides a status analysis comparing the changes in vacancy success across organizations in your enterprise, or across geographical areas. You can analyze the:

- Total number of openings recorded for vacancies.
- Total number of openings that have been filled.

This workbook also enables you to view the success of your recruitment activities.

The workbook calculates the total number of vacancy openings and the number of filled vacancies in a particular time period, to produce a vacancy success rate. Vacancy success is defined as the percentage of vacancy openings that are filled.

The workbook only includes vacancies that have a status of Closed and have an End Date within the selected time period.

The workbook only includes assignments that match the criteria selected in the workbook parameters. For example, an assignment must have the same budget measurement value as the worksheet parameter.

Business Questions

How many vacancies have there been in my enterprise within a specific geographical area?

How many of these vacancies have been filled? How does this compare with other geographical areas?

Parameters

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

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

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

- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Organization
- By Geography Area

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

Headings and Calculations

All worksheets contain the following columns:

- **A grouping column**
The heading depends on the selected worksheet, for example, in the by Organization worksheet, this column is named “Organization”.
- **Openings**
The number of openings for each group.
- **Employee Starts**

The number of employee starts for each group. The worksheets calculate the Employee Starts total by totaling the employee assignments created to fill the vacancies.

- **Success Rate Percent**

Displays the total workforce starts as a percentage of total workforce openings.

The worksheets count employee assignments using Workforce, enabling you to define the employee value of each assignment. See: *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 9-2

Vacancy Hire Success (Organization Hierarchy) Trend Analytics Workbook

The Vacancy Hire Success (Organization Hierarchy) Trend Analytics workbook provides a trend analysis showing the changes in vacancy success over a selected period of time. You can analyze the:

- Total number of openings recorded for vacancies.
- Total number of openings that have been filled.

This workbook also enables you to view the success of your recruitment activities.

The workbook calculates the total number of vacancy openings and the number of filled vacancies in a particular time period, to produce a vacancy success rate. Vacancy success is defined as the percentage of vacancy openings that are filled.

The workbook only includes vacancies that have a status of Closed and have an End Date within the selected time period.

The workbook only includes assignment that match the criteria selected in the workbook parameters. For example, an assignment must have the same budget measurement value as the worksheet parameter.

Business Questions

How many vacancies have there been in my enterprise over, for example, the last quarter?

How many of these vacancies have been filled? How does this compare with the previous quarter?

Parameters

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

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

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

- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

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

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

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**
The start date of the time period.
- **End Date**
The end date of the time period.
- **A time period column**
The heading depends on the selected worksheet, for example, in the by Year worksheet, this column is named "Year".
- **Openings**
The number of openings within the time period.
- **Employee Starts**
The number of employee starts within the time period. The worksheets calculate the Employee Starts total by totaling the employee assignments created to fill the vacancies
- **Success Rate Percent**
Displays the total workforce starts as a percentage of total workforce openings.

The worksheets count employee assignments using Workforce, enabling you to define the employee value of each assignment. See: *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 10-2

Vacancy Hire Success (Organization Hierarchy) Template Analytics Workbook

The Vacancy Hire Success (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating vacancy success over yearly periods, the other providing a detailed analysis of vacancy success in the workforce.

These worksheets help you to create reports to analyze the success of your recruitment activities. Recruitment success is defined as the percentage of vacancy openings that are filled.

The workbook calculates the total number of vacancy openings for each year, and how many of these have been filled.

The workbook uses the Budget Measurement Value to calculate the number of openings. The worksheet Openings column displays the number of Headcounts or Full Time Equivalents (depending on your Budget Measurement Value) represented by your vacancies.

The workbook only includes vacancies that have been closed within the selected time period.

The vacancy must also match all the selection criteria. For example, if you select an organization and a job, you must have entered an organization and job for the vacancy on the HRMS Requisition and Vacancy window.

The workbook calculates the Employee Starts total by totaling the employee assignments created to fill the vacancies. HRMS Intelligence counts employee assignments using Workforce, enabling you to define the employee value of each assignment.

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

The assignments created to fill the vacancy must match the criteria selected in the report, to appear in the Openings Filled total. For example, an assignment must have the same budget measurement value as the report parameters.

The success rate calculation is:

$$\frac{\text{Total Workforce Measurement Value for all Employee Starts} \times 100}{\text{Total Workforce Measurement Value for Openings}}$$

Parameters

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

- Start Date
- End Date

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

The template includes the following optional parameters:

- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Year
- By Detail

By Year Worksheet

The by Year worksheet enables you to see vacancy success for each year.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Start Date**
The start date of the time period.
- **End Date**
The end date of the time period.
- **Year**
The time period for which this worksheet is run.
- **Openings**
The number of openings within the time period.
- **Employee Starts**
The number of employee starts within the time period.
- **Success Rate Percent**
Displays the vacancy success rate.

Detail Worksheet

The Detail worksheet calculates the vacancy success rates for vacancies with the same opening and closing dates, for each organization, location, job, grade, and position.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Vacancy Open Date**

The date the vacancy opened.

- **Vacancy Close Date**

The date the vacancy closed.

- **Openings**

The number of openings within the vacancy open and close date, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Employee Starts**

The number of employee starts for openings within the vacancy open and close date, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value. The worksheets calculate the Employee Starts total by totaling the employee assignments created to fill the vacancies.

- **Success Rate Percent**

Displays the vacancy success rate. Recruitment success is a calculation of the total workforce starts as a percentage of total workforce openings.

- **Organization**

The organization that had the vacancy.

- **Location**

The location where the vacancy occurred.

- **Job**

The job for which the vacancy occurred.

- **Grade**

The grade for which the vacancy occurred.

- **Position**

The position for which the vacancy occurred.

Related Topics

Workforce Intelligence for Learning Management Key Concepts, page 10-2

Recruitment by Authorizer Analysis Workbook (EDW)

The Recruitment by Authorizer Analysis workbook is designed to present the Human Resources professional with detailed recruitment related data; for example, individual

authorizer activities, or number of days from start of vacancy until the hiring of the applicant is completed.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Average Days to Recruit, page 9-16
- Average Days to Recruit Over Time, page 9-16
- Average Days to Recruit by Organization, page 9-17
- Average Days to Recruit by Stage and Job Category, page 9-17
- Average Days to Recruit by Stage and Job, page 9-18
- Vacancy Activity, page 9-18

Average Days to Recruit Worksheet

The Average Days to Recruit worksheet measures the average number of days from both the vacancy start date to hire, and the application date to hire. Average values for both measures are also shown. This information is given for each recruitment authorizer within a specified top-level employing organization during a specified calendar year in which the applicant was hired.

The report is ordered by Average Days from Application to Hire, in descending order.

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**
Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit Over Time Worksheet

The Average Days to Recruit Over Time worksheet measures the average number of days from vacancy start date to hire, and application date to hire, for the past three calendar years and the current calendar year; average values for both measures are also given. This information is reported for each recruitment authorizer within a specified top-level employing organization.

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit by Organization Worksheet

The Average Days to Recruit by Organization worksheet measures both the average number of days from the vacancy start date to hire and from the application date to hire; average values for both measures are given for each organization and overall. This information is reported for each recruitment authorizer within all top-level employing organizations during a specific calendar year (the year the applicant was hired).

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit by Stage and Job Category Worksheet

The Average Days to Recruit by Stage and Job Category worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job category and each recruitment authorizer, during a specified calendar year (the year the applicant was hired).

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

No calculations are used by this worksheet.

Average Days to Recruit by Stage and Job Worksheet

The Average Days to Recruit by Stage and Job worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job and for a specified recruitment authorizer, during a specified calendar year (the year the applicant was hired).

Business Questions

Which authorizers are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

No calculations are used by this worksheet.

Vacancy Activity Worksheet

The Vacancy Activity worksheet provides information for a specified authorizer on the status of each vacancy. It reports the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Business Questions

What recruitment stages have applicants for vacancies reached, by authorizer?

Parameters

You must specify values for the following parameters:

- Vacancy Start From
- Vacancy Start To

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

- **Openings Remaining**

Populates the Openings Remaining column with the difference between the number of openings for a vacancy and the number of applicants hired.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 9-2

Recruitment by Recruiter Analysis Workbook (EDW)

The Recruitment by Recruiter Analysis workbook is designed to present the Human Resources professional with detailed recruitment related data; for example, individual recruiter activities, or number of days from start of vacancy until the hiring of the applicant is completed.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Worksheets

This workbook has the following worksheets:

- Average Days to Recruit, page 9-19
- Average Days to Recruit Over Time, page 9-20
- Average Days to Recruit by Organization, page 9-20
- Average Days to Recruit by Stage and Job Category, page 9-21
- Average Days to Recruit by Stage and Job, page 9-21
- Vacancy Activity, page 9-21

Average Days to Recruit Worksheet

The Average Days to Recruit worksheet measures the average number of days from both the vacancy start date to hire, and the application date to hire. Average values for both measures are also shown. This information is given for each recruiter within a specified top-level employing organization during a specified calendar year in which the applicant was hired.

The report is ordered by Average Days from Application to Hire, in descending order.

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit Over Time Worksheet

The Average Days to Recruit Over Time worksheet measures the average number of days from vacancy start date to hire, and application date to hire, for the past three calendar years and the current calendar year; average values for both measures are also given. This information is reported for each recruiter within a specified top-level employing organization.

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit by Organization Worksheet

The Average Days to Recruit by Organization worksheet measures both the average number of days from the vacancy start date to hire and from the application date to hire; average values for both measures are given for each organization and overall. This information is reported for each recruiter within all top-level employing organizations during a specific calendar year (the year the applicant was hired).

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Average Days to Recruit by Stage and Job Category Worksheet

The Average Days to Recruit by Stage and Job Category worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job category and each recruiter, during a specified calendar year (the year the applicant was hired).

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

No calculations are used by this worksheet.

Average Days to Recruit by Stage and Job Worksheet

The Average Days to Recruit by Stage and Job worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job and for a specified recruiter, during a specified calendar year (the year the applicant was hired).

Business Questions

Which recruiters are the most or least successful in recruiting for a given organization, position, location, etc?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

No calculations are used by this worksheet.

Vacancy Activity Worksheet

The Vacancy Activity worksheet provides information for a specified recruiter on the status of each vacancy. It reports the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Business Questions

What recruitment stages have applicants for vacancies reached, by recruiter?

Parameters

You must specify values for the following parameters:

- Vacancy Start From
- Vacancy Start To

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Average Days to Fill**
Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.
- **Openings Remaining**
Populates the Openings Remaining column with the difference between the number of openings for a vacancy and the number of applicants hired.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 9-2

Workforce Recruitment Stage Analysis Workbook (EDW)

The Workforce Recruitment Stage Analysis workbook is designed to report on the details of each stage of a recruitment activity, such as first interview, offer, and acceptance.

Worksheets

This workbook has the following worksheets:

- Recruitment by Organization, page 9-23
- Recruitment by Age Band, page 9-23
- Recruitment by Disability Status, page 9-24
- Recruitment by Gender, page 9-24
- Recruitment by Location, page 9-25
- Vacancy Activity, page 9-26
- Vacancy Activity by Job, page 9-26
- Efficiency (Average Days), page 9-27
- Average Days to Recruit by Stage and Job Category, page 9-27
- Average Days to Recruit by Stage and Job, page 9-28

Recruitment by Organization Worksheet

The Recruitment by Organization worksheet provides a recruitment summary for a specified top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.
- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

Show me the total gains for all organizations in the primary hierarchy of a Business Group.

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Recruitment by Age Band Worksheet

The Recruitment by Age Band worksheet provides a recruitment summary by age band for a selected top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.
- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

How many applicants are in a known minority age group, as a ratio of all applicants?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Recruitment by Disability Status Worksheet

The Recruitment by Disability Status worksheet provides a recruitment summary by disability status (disabled, not disabled, or undefined) for a selected top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.
- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

How many applicants are in a known minority group (disability status) as a ratio of all applicants?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Recruitment by Gender Worksheet

The Recruitment by Gender worksheet provides a recruitment summary by gender for a selected top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.

- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

How many applicants are in a known minority gender group as a ratio of all applicants?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Recruitment by Location Worksheet

The Recruitment by Location worksheet provides a recruitment summary by location for a selected top-level employing organization. You can report on the following measures:

- Head count.
- Full time equivalent.
- Average number of days between application and hire for each assignment by organization and year.
- Average number of days between vacancy start and hire for each assignment by organization and year.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

How is my recruitment activity spread over different enterprise locations?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses the following calculation:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

Vacancy Activity Worksheet

The Vacancy Activity worksheet provides information for a specified top-level employing organization on the status of each vacancy; for example, the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Business Questions

How many open vacancies do I have?

Show me the number of applicants for each vacancy.

Parameters

You must specify values for the following parameters:

- Vacancy Start From
- Vacancy Start To

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

- **Openings Remaining**

Populates the Openings Remaining column with the difference between the number of openings for a vacancy and the number of applicants hired.

Vacancy Activity by Job Worksheet

The Vacancy Activity by Job worksheet provides information for a specified top-level employing organization and job on the status of each vacancy; for example, the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Business Questions

How many open vacancies do I have?

Show me the number of applicants for each vacancy.

Parameters

You must specify values for the following parameters:

- Vacancy Start From
- Vacancy Start To

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Average Days to Fill**

Populates the Average Days from Vacancy Start to Hire column with the average interval in days between the date that the vacancy started, and the date that the employee was hired. The calculation excludes the vacancy start date and the employee hire date.

- **Openings Remaining**

Populates the Openings Remaining column with the difference between the number of openings for a vacancy and the number of applicants hired.

Efficiency (Average Days) Worksheet

The Efficiency (Average Days) worksheet provides information concerning the recruitment efficiency of each top-level employing organization for a specified calendar year. It reports the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

Show me the average time to hire/offer/first interview by job, location, etc.

What is the average time to offer/rejection by job, location, etc?

From which locations/jobs do we have the greatest difficulty (based on average time to hire) or the greatest cost in hiring?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses no calculations.

Average Days to Recruit by Stage and Job Category Worksheet

The Average Days to Recruit by Stage and Job Category worksheet provides recruitment information for each job category in a top-level employing organization within a specified calendar year. It reports the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

Show me the average time to hire/offer/first interview by job, location, etc.

What is the average time to offer/rejection by job, location, etc?

From which locations/jobs do we have the greatest difficulty (based on average time to hire) or the greatest cost in hiring?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses no calculations.

Average Days to Recruit by Stage and Job Worksheet

The Average Days to Recruit by Stage and Job worksheet provides recruitment information for each job (for example, Line Manager or Sales Person) in a top-level employing organization within a specified calendar year. You can report on the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

The workbook includes information for the previous three calendar years (from 1 January 3 years ago, to the current year) and for the current calendar year to date.

Business Questions

Show me the average time to hire/offer/first interview by job, location, etc.

What is the average time to offer/rejection by job, location, etc?

From which locations/jobs do we have the greatest difficulty (based on average time to hire) or the greatest cost in hiring?

Parameters

This worksheet has no parameters.

Worksheet headings and calculations

This worksheet uses no calculations.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 9-2

Recruitment Success (Hires) KPI Status PMV Report

The Recruitment Success (Hires) KPI Status PMV report provides you with a view of the HRI Recruitment Success (Starts) Status KPI data, including the number of vacancies, the actual number of successful vacancy starts, and the target number for successful vacancy starts. The report groups this information into Organizations, Locations, Grades, Jobs, or Positions, depending on the value you select in the View By parameter.

See: HRI Recruitment Success (Starts) Status KPI, page 9-29

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

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

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

Related Topics

Key Concepts for Recruiting and Hiring PMV Reports, page 9-3

HRI Recruitment Success (Starts) Status KPI

Use the HRI Recruitment Success (Starts) Status KPI to set up targets and notify a particular responsibility when recruitment success falls below a predefined level.

For example, you can notify all users with a management responsibility when recruitment success falls below 70%.

Business Questions

Tell me when recruitment in my organization is unsuccessful, compared to my target for recruitment success.

KPI Parameters

The HRI Recruitment Success (Starts) Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Workforce Measurement Type
- Start Date
- End Date

Target Comparisons

The KPI compares your targets to vacancies that:

- Have a status of closed in the time period for the target.

- Are for the organization defined by the organization parameter.
- Are defined with the selected budget measurement type.

Related Topics

Recruitment Success (Hires) KPI Status PMV Report, page 9-28

Recruitment Success (Hires) with Job Category KPI Status PMV Report

The Recruitment Success (Hires) with Job Category KPI Status PMV report provides you with a view of the HRI Recruitment Success (Starts) Job Category Status KPI data including the number of vacancies within a job category, the actual number of successful vacancy starts for a job category, and the target number for successful vacancy starts within a job category.

The report groups this information into Organizations, Locations, Grades, Jobs, or Positions, depending on the value selected in the View By parameter.

See: HRI Recruitment Success (Starts) with Job Category Status KPI, page 9-30

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Job Category
- Workforce Measurement Type
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

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

- Area/Country/Region/Location
- Grade
- Position

Related Topics

Key Concepts for Recruiting and Hiring PMV Reports, page 9-3

HRI Recruitment Success (Starts) with Job Category Status KPI

The HRI Recruitment Success (Starts) with Job Category Status KPI enables you to set up targets and notify a particular responsibility when recruitment success falls below a predefined level for a specific job category.

For example, you can notify all users with a management responsibility when recruitment success in a job category falls below 70%.

Business Questions

Tell me when recruitment to a job category in my organization is unsuccessful, compared to my target for recruitment success.

KPI Parameters

The HRI Recruitment Success (Starts) Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category
- Workforce Measurement Type
- Start Date
- End Date

Target Comparisons

The KPI compares your targets to vacancies that:

- Have a status of closed in the time period for the target.
- Are for the organization defined by the organization parameter.
- Have the job category defined in the job parameter.
- Are defined with the selected budget measurement type.

Related Topics

Recruitment Success (Hires) with Job Category KPI Status PMV Report, page 9-30

Recruitment Success Report

This report provides a trend analysis showing the changes in recruitment success over a selected period of time. You can analyze the:

- Total number of openings recorded for vacancies.
- Total number of openings that have been filled.
- Performance Management Framework recruitment success targets.

This report also enables you to view the success of your recruitment activities. The report defines recruitment success as the percentage of vacancy openings that are filled.

The report uses the workforce created to fill the vacancies to calculate the openings filled total for each time period.

Business Questions

How successful is my recruitment and what is the trend?

Report Parameters

You must specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Budget Measurement Type
- Job Category
- Job
- Business Plan
- Frequency
- Reporting Dates

Key Concepts

The Recruitment Success report calculates the total number of vacancy openings in a particular time period, and how many of these have been filled.

Number of Openings

For an opening to be included, it must be for a vacancy that has been closed in the selected time period. The vacancy must also match all the selection criteria.

For example, if you select an organization and a job, you must have entered an organization and job for the vacancy on the HRMS Requisition and Vacancy window.

Openings Filled

The report calculates the Openings Filled total by totaling the employee assignments created to fill the vacancies. Within HRMS Intelligence, you count employee assignments using Workforce; enabling you to define the employee value of each assignment. See: *Workforce Calculation, Oracle HRMS Configuring, Reporting, and System Administration Guide*

The assignments created to fill the vacancy must match the criteria you select in the report parameters. The report does not include assignments in the Openings Filled total that do not match these criteria. For example, an assignment must have the same budget measurement value as the report parameters.

Recruitment Success

Recruitment success is calculated as:

$$\left(\frac{\text{Total Budget Values for all Relevant Vacancies}}{\text{Total Budget Value for Employee Assignments}} \right) \times 100$$

Learning Management Intelligence

Learning Management Intelligence

Workforce Intelligence for Learning Management Overview

To use the Learning Management reports and workbooks, you must install both Oracle HRMS and Oracle Learning Management (OLM, formerly Oracle Training Administration).

The following key concepts enable you to accurately interpret the results of the reports in Learning Management:

- Calculation of Training Event Hours, page 10-2
- Successful Hours, page 10-2
- Calculation of Training Success, page 10-2
- Report Data, page 10-3
- Scope of Training Success Reports, page 10-3
- Training Success Targets for KPIs, page 10-3

Calculation of Training Event Hours

The Learning Management reports calculate the total number of hours employees have spent on training classes. For the reports to include a training class in calculations, the training class must:

- Have ended in the time period defined by the time parameters
- Have a status of Normal or Closed, if the class is scheduled
- Not have a status of cancelled

The reports calculate the hours spent on each training class and multiply them by the number of relevant employees who attended the course.

Because students can be internal or external, the reports use the enrollment status of Attended, rather than assignment budget values, to count employees.

Successful Hours

If a learner has successfully attended a class, the reports calculate the hours of the class using a predefined formula, then calculate the total number of successful hours for all relevant employees.

See: *Amending the Default Training Hours, Oracle HRMS Configuring, Reporting, and System Administration Guide* and *Adding Additional Training Time Periods, Oracle HRMS Configuring, Reporting, and System Administration Guide*

Calculation of Training Success

Most reports and workbooks calculate training success as the percentage of total training hours delivered for your employees against the number of those hours that were successful.

The Analytics workbooks, however, calculate training success as the percentage of successful students against the total number of attendees of a class.

Report data

The reports display employee job, grade, position, and organization as of the date the employee enrolled in the class. The reports do not show any updates to these values after enrollment, unless another enrollment occurs.

Scope of Training Success Reports

Training Success reports and workbooks include only employees who:

- Worked in the selected organization on the date they enrolled in the class.
- Have the class enrollment status of Attended.
- Have, on the enrollment date, an assignment that matches the parameters you select.

When you enroll an employee in a class, you record their assignment. The reports and workbooks use this assignment, even if the employee subsequently changed their assignment.

Training Success reports and workbooks include a class only if:

- An employee included in the report attended it.
- The class ended prior to the workbook end date.
- The class status is Normal or Closed.
- The class has not been cancelled.

If a training event runs over two time periods the reports count it only once, since the Training Success reports and workbooks use the class end date to count classes.

Training Success Targets for KPIs

Use the following guidelines when setting up targets for the Human Resources Intelligence (HRI) Training Attendance Key Performance Indicators (KPIs):

- Enter the target as a percentage of the success you expect. For example, enter 90 if the training success target is 90%.
- Only set up Below Target values in the ranges for each notification responsibility. These KPIs indicate when training success falls below the targets level.
- Do **not** set up Above Target values.

Training Class Ranking Status Workbook

This workbook investigates the popularity of training classes within a given period of time, by class days and attendance.

Worksheets

This workbook has the following worksheets:

- By Class Days
- By Attendance

By Class Days Worksheet

This worksheet enables you to investigate the popularity of training classes by ranking them by class days.

Business Questions

Which are the most popular classes by class days?

Which classes could be most profitable?

Parameters

You need to specify values for the following parameters:

- Class From Date
- Class To Date

Headings and Calculations

This worksheet contains the following column:

- **Free Seats**

Values in this column are based on the Maximum Attendees minus Student Count. The calculation takes into account the number of canceled internal students as well as the number of canceled external students.

By Attendance Worksheet

This worksheet enables you to analyze the popularity of training classes by ranking them by course attendance.

Business Questions

Which are the most popular classes by attendance?

Which classes are in high demand?

Parameters

You need to specify values for the following parameters:

- Class From Date
- Class To Date

Headings and Calculations

This worksheet contains the following column:

- **Free Seats**

Values in this column are based on the Maximum Attendees minus Student Count. The calculation takes into account the number of canceled internal students as well as the number of canceled external students.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Student Training Success (External Students) Analysis Workbook

This workbook investigates the training success ratio for external learners (students not employed by the organization running the training). If the SUCCESSFUL_ATTENDANCE_FLAG column of the OTA_DELEGATE_BOOKING table in the OTA schema is set to Yes, that enrollment is considered successful.

Worksheets

This workbook includes the following worksheets:

- By Company
- By Company and Year

Key Concepts

These worksheets use classes to calculate success. For a class to be included it must:

- Have an end date prior to the present date.
- Have a status of Normal or Closed, if the class is scheduled.
- Not be Canceled.

The hours of a class are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of classes, you may need to customize this formula. See *Setting Up and Customizing Training Hours, Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in OLM and HRMS, the Student Training Success (External Students) Analysis workbook calculates the following:

- **Hours Delivered**

The total number of training hours of all the relevant classes multiplied by the number of places filled by students on these classes.

- **Successful Hours**

If a student is recorded as successfully having attended the class, then the employee's hours for this class are recorded as successful hours.

In the workbook, the successful hours are the total number of successful hours for all relevant classes.

- **Success Rate Percentage**

Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Company Worksheet

This worksheet enables you to analyze the success of training hours delivered to external students for a company. You can investigate this for a business group and year.

Business Questions

What is the student success ratio for a particular company (or customer)?

Which company has the highest training success ratio?

Parameters

This worksheet has no parameters.

By Company and Year Worksheet

This worksheet enables you to analyze the success of training hours delivered to external students for a company, for different years. You can investigate this for a business group and each company.

Business Questions

In which training year did a particular customer have the highest student success ratio?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Student Training Success (Internal Students) Analysis Workbook

This workbook investigates the training success ratio for internal students (students employed by the organization running the training).

Success ratio is calculated as the number of successful training hours delivered to internal students divided by the total number of training hours delivered to internal students. The number of successful training hours per class is the number of successful internal students enrolled for a class, multiplied by the course duration in days for that class.

The total number of training hours delivered to internal students for a class is the total number of internal students enrolled for a class, multiplied by the course duration in days for that class.

If the SUCCESSFUL_ATTENDANCE_FLAG column of the OTA_DELEGATE_BOOKING table in the OTA schema is set to Yes, that enrollment is considered successful.

Worksheets

This workbook includes the following worksheets:

- By Organization and Year
- By Location and Year
- By Job Category and Year
- By Job and Year
- Attendance Summary

Key Concepts

These worksheets use classes to calculate success. For a class to be included it must:

- Have an end date prior to the present date.

- Have a status of Normal or Closed, if the class is scheduled.
- Not be Cancelled.

The hours of a class are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of classes, you may need to customize this formula. See *Setting Up and Customizing Training Hours, Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in OLM and HRMS, the Student Training Success (Internal Students) Analysis workbook calculates the following:

- **Hours Offered**

The total number of training hours for all relevant classes multiplied by the number of places available in all relevant classes.

- **Hours Delivered**

The total number of training hours of all the relevant classes multiplied by the number of places filled by students in these classes.

- **Hours Received**

The total number of training hours employees have attended for all relevant training classes.

- **Successful Hours**

If a student is recorded as successfully having attended the class, then the employee's hours for this class are recorded as successful hours.

In the workbook, the successful hours are the total number of successful hours for all relevant classes.

- **Utilization %**

The total hours delivered as a percentage of the hours offered. For example, if 5 hours were delivered, and 10 hours were offered, then the utilization percentage would be 50%.

- **Success Rate %**

Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Organization and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students each year, and the success of these hours. You can investigate student success rates for a business group and organization within your enterprise.

Business Questions

What is the training success rate of an organization over a given period of time?

In which year did an organization have highest training success rate?

Parameters

This worksheet has no parameters.

By Location and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students for a location each year, and the success of these hours. You can investigate student success rates for a business group and organization within your enterprise.

Business Questions

What is the training success rate for a training location over a given period of time?

In which training year did a particular training location have the highest training success rate?

Parameters

This worksheet has no parameters.

By Job Category and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students each year for a job by category, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Business Questions

What is the training success rate for a job category over a given period of time?

In which training year was the success rate highest for a particular job category?

Parameters

This worksheet has no parameters.

By Job and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students for a job by year, and the success of these hours. You can investigate student success rates for a business group and organization within your enterprise.

Business Questions

What is the training success rate for a job over a given period of time?

In which year did a job have the highest training success rate?

Parameters

This worksheet has no parameters.

Attendance Summary Worksheet

This worksheet enables you to analyze the number of internal students attending training classes. You can view internal student attendance by activity type, analyze success rates and information about failures.

Business Questions

How successful are my courses?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Training Cost and Revenue Analysis Workbook

This workbook investigates the costs involved in running training activities (courses), and indicates the revenue generated by these events (classes). It analyzes costs and revenue information by training course, sponsoring organization, training center, training category and competence.

Worksheets

This workbook has the following worksheets:

- By Training Course
- Training Course by Year
- By Sponsoring Organization
- Sponsoring Organization by Year
- By Training Center
- Training Center by Year
- By Training Category
- Training Category by Year
- By Competence
- By Competence and Year

Headings and Calculations

This workbook uses the following headings and calculations:

Currency of Results

Within OLM you can enter your costs in any currency you have set up, so that the worksheets all report in the same currency. HRMSi converts the results into the base currency of the business group.

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

Budget Cost

Budget costs are calculated using the costs of scheduled events (classes). The budget costs for scheduled events (classes) are taken from the budget cost entered in the OLM Class page.

Actual Cost

Actual costs are taken as the actual cost of the scheduled event (class), entered in the OLM Class page, and the cost of resources booked for the event (class).

For the cost of a resource to be included, it must be confirmed and associated with the event (class). Enter the cost for one resource per day. The cost is then multiplied by the quantity of resource required, and number of days.

The actual cost of an event (class) is the actual cost plus the cost of all resources for the event (class).

Actual Revenue

Actual revenue is the sum of internal and external revenue for each scheduled event (class). Internal revenue is calculated using the internal enrollments for a scheduled event (class).

Internal enrollments are entered in the Enrollment Details window using the organization type. For the enrollment to be included, it must have a status of Attended.

Note: The workbook does not use the Internal check box on the Enrollment page.

The number of places for all internal enrollments are then added together. This is then multiplied by the price basis amount for the event (class).

External revenue is calculated using all the external enrollments for a scheduled event (class). For the enrollment to be included, it must have a status of Attended.

External enrollments are linked to a finance line, which includes the cost of the enrollment. For a finance line to be included, it must be of the type Enrollment and must not be cancelled.

The total external revenue is the sum of the finance line amounts, summed over all the external bookings.

Students Enrolled

The total number of external students enrolled, added to the total number of internal students enrolled.

Cost per Student

The actual cost divided by the students enrolled.

Revenue per Student

The actual revenue divided by the students enrolled.

Hours Offered

The total number of training hours for all relevant events (classes) multiplied by the number of places available on these events (classes).

Hours Delivered

The total number of training hours for all relevant events (classes), multiplied by the number of places filled by students on these events (classes).

Cost per Hour

The actual costs divided by the hours delivered.

By Training Course Worksheet

This worksheet enables you to analyze the cost and revenue generated by training events (classes). You can investigate training activities for a specific Business Group, sponsoring organization and year.

Business Questions

What are the costs involved in running training events (classes) by course?

How much revenue is generated by these training events (classes), every year?

Parameters

This worksheet does not use parameters.

Training Course by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities for different years, by business group and sponsoring organization.

Business Questions

What are the costs involved in running a training course?

How much revenue is generated by this course each year?

Parameters

This worksheet does not use parameters.

By Sponsoring Organization Worksheet

This worksheet enables you to analyze the cost and revenue of training events (classes) for different organizations, by business group and year.

Business Questions

For each sponsoring organization, what are the actual and budgeted training costs?

How much revenue is generated during a year?

Parameters

This worksheet does not use parameters.

Sponsoring Organization by Year Worksheet

This worksheet enables you to analyze the costs and revenue associated with training for different years. You can investigate costs and revenue for a Business Group and sponsoring organization.

Business Questions

What are the training costs and revenues generated for a sponsoring organization by training year?

Parameters

This worksheet does not use parameters.

By Training Center Worksheet

This worksheet enables you to analyze the costs and revenue of a training event (classes) for a training center, by business group, sponsoring organization and year.

Business Questions

What are the actual and budgeted training costs for each training center?

How much revenue is generated by each training center by year?

Parameters

You need to specify values for the following parameters:

- Event Training Center Hierarchy
- Top Event Training Center

Training Center by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities for different years. You can investigate by business group, sponsoring organization, and training center.

Business Questions

For each training center, what are the actual and budgeted training costs?

How much revenue is generated for a sponsoring organization by training year?

Parameters

You need to specify values for the following parameters:

- Event Training Center Hierarchy
- Top Event Training Center

By Training Category Worksheet

This worksheet enables you to analyze the cost and revenue of training events (classes) for a training category. You can investigate costs and revenue for a business group, sponsoring organization, and year.

Business Questions

What are the costs involved in running training events (classes) by category?

How much revenue is generated by each category?

Parameters

This worksheet does not use parameters.

Training Category by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training events (classes) in different years. You can investigate costs and revenue for a business group, sponsoring organization, and training category.

Business Questions

What are the costs involved in running training events (classes) for a training category by year?

How much revenue is generated by training events (classes) for a training category by year?

Parameters

This worksheet does not use parameters.

By Competence Worksheet

This worksheet enables you to analyze the cost and revenue of training activities by the competence achieved if a student successfully completes the course.

Business Questions

What are the costs involved in running training events (classes) by year for a training competence?

How much revenue is generated by training events (classes) by year for a training competence?

Parameters

This worksheet does not use parameters.

By Competence and Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities by competence and year.

Business Questions

What are the costs involved in running training events (classes) for a training competence by year?

Tell me how much revenue is generated by running training events (classes) for a training competence by year.

Parameters

This worksheet does not use parameters.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Training Course Ranking by Amount Status Workbook

This workbook investigates the total amount of money generated by enrollments in each training class, and allows training classes to be ranked by the enrollment amount generated.

Enrollments for a course may occur using a variety of currencies. The Course Ranking by Amount Workbook can convert foreign currencies to a common currency for reporting purposes. Currencies are converted using exchange rates maintained in a general ledger application.

Enrollments are possible through both OLM and Order Management (OM). This workbook reports on enrollments from both systems to produce a total enrollment amount for each class.

Worksheets

This workbook includes the following worksheet:

- Course Ranking by Amount

Business Questions

Which is the most profitable training class?

Which is the least profitable training class?

What is the total enrollment amount generated within a given period of time?

Parameters

You must specify values for some of the following parameters:

- Category
- Class start date
- Class end date
- Reporting currency
- Exchange rate
- Training class status
- Order header status
- Order line status
- Training center hierarchy
- Top training center

Worksheet Calculations

The worksheet uses the following calculations:

- **Class days**

Calculates the page item Class Duration Days, based on the Class Duration in days multiplied by the total number of enrollments.

- **Class days – internal**

Calculates the page item, Class Days--Internal, based on a sum of Total Internal Enrollments multiplied by the Class Duration.

- **Class days – external**

Calculates the page item, Class Days--External, based on a sum of Total External Enrollments multiplied by the Class Duration.

- **Class duration days**

Calculates the page item, Class Duration, based on the number of days between the Class Start Date and Class End Date.

- **Reporting currency**

Populates the Reporting Currency column with the currency code for the currency being used.

- **Total amount per class**

Populates the page item Total Amount per Class with the sum of Amount per Class.

- **Total attended amount**

Calculates the page item Total Non Attended Amount, based on a sum of Total Amount where the booking status is equal to Attended.

- **Total enrollments**

Calculates the total number of enrollments for each iLearning training class, based on a sum of Places Booked per Class.

- **Total external enrollments**

Populates the variable Total External Enrollments, based on a sum of Places Booked for external bookings only.

- **Total internal booking amount**

Populates the page item Total Internal Booking Amount, based on a sum of Internal Booking Amount per Class.

- **Total internal enrollments**

Populates the variable Total Internal Enrollments, based on a sum of Places Booked for internal bookings only.

- **Total non-attended amount**

Calculates the page item Total Non Attended Amount, based on a sum of Total Amount where the enrollment status is not equal to Attended.

- **Total OM amount per class**

Calculates the page item, Total OM Amount per Class, based on a sum of OM Amount per Class.

- **Total OTA amount per class**

Populates the variable Total External Enrollments, based on a sum of Places Booked for external bookings only.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Training Success Workbook

This workbook investigates the time utilization and success rate of training classes.

To calculate the time utilization of the training classes, the report divides the total number of students confirmed in the class by the maximum number of students allowed to enroll in the class.

To calculate the success rate of the training class the report divides the total number of successful students by the total number of students confirmed in the class.

Worksheets

This workbook includes the following worksheets:

- By Sponsoring Organization
- By Sponsor Organization and Year
- By Training Course
- By Training Course and Year
- By Training Center
- By Training Center and Year
- By Training Category
- By Training Category and Year
- By Competence
- By Competence and Year

Headings and Calculations

The workbook uses the following calculations:

- **Success Rate**

Success rate is calculated as a number of successful training hours delivered to external students divided by the total number of training hours delivered to external students, where:

- The number of successful training hours per class is the number of successful external students enrolled, multiplied by the class duration.
- The total number of training hours delivered to external students for a class is the total number of external students enrolled in the class, multiplied by the class duration in days.

- **Successful Hours**

This calculation is based on the number of Training Hours multiplied by the number of successful students.

- **Utilization**

This calculation is based on the Training Hours Delivered divided by the Training Hours Offered.

- **Hours Delivered**

This calculation is based on the number of training hours required by the class multiplied by the number of enrolled students.

- **Hours Offered**

This calculation is based on the number of training hours required by the class multiplied by the maximum number of attendees.

Key Concepts

These worksheets use classes to calculate success. For a class to be included it must:

- Have an end date prior to the present date.
- Have a status of Normal or Closed, if the class is scheduled.
- Not be Cancelled.

The hours of a class are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of classes, you may need to customize this formula. See *Setting Up and Customizing Training Hours, Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in OLM and HRMS, the Training Success workbook calculates the following:

- **Hours Offered**

The total number of training hours for all relevant classes multiplied by the number of places available in all relevant classes.

- **Hours Delivered**

The total number of training hours of all the relevant classes multiplied by the number of places filled by students in these classes.

- **Hours Received**

The total number of training hours employees have attended for all relevant training classes.

- **Successful Hours**

If a student is recorded as successfully having attended the class, then the employee's hours for this class are recorded as successful hours.

In the workbook, the successful hours are the total number of successful hours for all relevant classes.

- **Utilization %**

The total hours delivered as a percentage of the hours offered. For example, if 5 hours were delivered, and 10 hours were offered, then the utilization percentage would be 50%.

- **Success Rate %**

Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Sponsoring Organization Worksheet

This worksheet enables you to investigate the training success rate of training classes for different sponsoring organizations.

Business Questions

What is the training utilization rate by sponsoring organization for a year?

What is the training success rate by sponsoring organization for a year?

Parameters

This worksheet has no parameters.

By Sponsoring Organization and Year Worksheet

This worksheet enables you to investigate the training success rate of training classes for a sponsoring organization for each year.

Business Questions

What is the training utilization rate for a sponsoring organization by year?

What is the training success rate by sponsoring organization by year?

Parameters

This worksheet has no parameters.

By Training Course Worksheet

This worksheet enables you to investigate the success rate of different training courses. You can investigate courses by year and sponsoring organization.

Business Questions

What is the training utilization rate by training course for a year?

What is the training success rate by training course for a year?

Parameters

This worksheet has no parameters.

By Training Course and Year Worksheet

This worksheet enables you to investigate the success rate of courses each year. You can investigate courses by business group and course.

Business Questions

What is the training utilization rate for a training course by year?

What is the training success rate for a training course by year?

Parameters

This worksheet has no parameters.

By Training Center Worksheet

This worksheet enables you to investigate the training success rate of different training centers, by business group and year.

Business Questions

What is the training utilization rate by training center for a class year?

What is the training success rate by training center for a class year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Training Center and Year Worksheet

This worksheet enables you to investigate the training success rate of a training center over a number of years. You can analyze success by business group and training center.

Business Questions

What is the training utilization rate for a training center by training year?

What is the training success rate for a training center by training year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Training Category Worksheet

This worksheet enables you to investigate the training success rate of classes by training category. You can investigate different training categories for a business group and year.

Business Questions

What is the training utilization rate by training category for a training year?

What is the training success rate by training category for a training year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Training Category and Year Worksheet

This worksheet enables you to investigate the training success rate of a training class in different years. You can analyze training success for a business group and training category.

Business Questions

What is the training utilization rate for a training category by year?

What is the training success rate for a training category by year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Competence Worksheet

This worksheet enables you to investigate the success rate of a training course by competencies. You can investigate competencies for a sponsoring organization and year.

Business Questions

What is the training utilization rate by training competency for a class year?

What is the training success rate by training competency for a class year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Competence and Year Worksheet

This worksheet enables you to investigate the training success rate of training activities for a competence over a number of years. You can investigate a competence for each sponsoring organization.

Business Questions

What is the training utilization rate for a training competence by class year?

What is the training success rate for a training competence by class year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Employee Training Attendance Success (Organization Hierarchy) Status Analytics Workbook

The Training Success (Organization Hierarchy) Status Analytics workbook investigates how successfully employees in different organizations and geographical areas are attending training courses.

Business Questions

How successful is employee training across different organizations or geographical areas?

Which organization is the most successful at training?

Which geographical area is the least successful at training?

Parameters

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

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Organization
- By Geography Area

The worksheets display one row for each grouping. For example, the By Organization worksheet displays one row per organization.

Headings and Calculations

All worksheets contain the following columns:

- **A grouping column**
The heading depends on the selected worksheet; for example, in the By Organization worksheet, the heading is Organization.
- **Attendees**
The number of attendees on training courses for each group.
- **Successful Attendees**
The number of successful attendees of training courses for each group.
- **Success Rate Percent**
Displays the number of successful attendees as a percentage of the total number of attendees.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Employee Training Attendance Success (Organization Hierarchy) Trend Analytics Workbook

The Training Success (Organization Hierarchy) Trend Analytics workbook investigates how successfully employees are attending training courses over time.

Business Questions

Is the training in my enterprise become more or less successful over time?

Parameters

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

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name

- Position Name

Worksheets

This workbook has the following worksheets:

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

The worksheets display one row for each time period. For example, the By Month worksheet displays one row per month.

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**
The start date of the time period.
- **End Date**
The end date of the time period.
- **A time period column**
The heading depends on the selected worksheet; for example, in the by Year worksheet, this column heading is Year.
- **Attendees**
The number of attendees of training courses for each time period.
- **Successful Attendees**
The number of successful attendees of training courses for each time period.
- **Success Rate Percent**
Displays the number of successful attendees as a percentage of the total number of attendees.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Employee Training Attendance Success (Organization Hierarchy) Template Analytics Workbook

The Employee Training Attendance Success (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating training success over yearly periods, the other providing a detailed analysis of training success in the workforce. These worksheets help you to create reports to analyze the success of your

training courses. Training success is defined as the percentage of training courses that are successfully completed.

Parameters

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

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook includes the following worksheets:

- By Year
- By Detail

By Year Worksheet

The By Year worksheet enables you to see training success for each year.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Start Date**
The start date of the time period.
- **End Date**
The end date of the time period.
- **Year**
The time period for which this worksheet is run.
- **Attendees**
The number of attendees on training courses for each group.

- **Successful Attendees**

The number of successful attendees on training courses for each group.

- **Success Rate Percent**

Displays the number of successful attendees as a percentage of the total number of attendees.

Detail Worksheet

The Detail worksheet calculates the training success rates for training classes with the same start and end dates, for attendees in each organization, location, job, grade, and position.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Training Class Start Date**

The date the class started.

- **Training Class End Date**

The date the class ended.

- **Attendees**

The number of attendees of classes with the same start and end dates, who are in the same organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Successful Attendees**

The number of attendees successfully completing the training class, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Success Rate Percent**

Displays the number of successful attendees as a percentage of the total number of attendees.

- **Organization**

The organization of the attendees.

- **Location**

The location of the attendees.

- **Job**

The job held by the attendees.

- **Grade**

The grade held by the attendees.

- **Position**

The position of the attendees.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Training Attendance KPI Status PMV Report

The Training Attendance KPI Status PMV report provides you with a view of the HRI Training Attendance Status KPI data including the total number of attendees, the total number of successful attendees, the target values for training attendance success, and the actual values for training attendance success.

See: HRI Training Attendance Status KPI, page 10-26

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

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

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

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

HRI Training Attendance Status KPI

Use the HRI Training Attendance Status KPI to notify different responsibilities when your training success falls below your target level. For example, you can notify all users with a senior management responsibility when the success of your training falls below 50%.

Business Questions

Tell me when training in my organization is unsuccessful, compared to my target for training success.

Target Comparisons

The HRI Training Attendance Status KPI compares your KPI targets with the training hours of employees who:

- Are employed in the selected organization, and defined by the organization dimension on the date they were enrolled in the class.

- Have the enrollment status of Attended for a class.

KPI Parameters

The HRI Training Attendance Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Start date
- End date

To understand how this KPI calculates training attendance success, see Training Success Targets for KPIs, page 10-3

Related Topics

Training Attendance KPI Status PMV Report, page 10-26

Workforce Intelligence for Learning Management Overview, page 10-2

Training Attendance with Job Category KPI Status PMV Report

The Training Attendance with Job Category KPI PMV report provides you with a view of the HRI Training Attendance with Job Category Status KPI data including the total number of attendees in the selected job category, the total number of successful attendees, the target values for training attendance success, and the actual values for training attendance success.

See: HRI Training Attendance with Job Category Status KPI, page 10-28

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Job Category
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

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

- Area/Country/Region/Location
- Grade
- Position
- Training Course

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

HRI Training Attendance with Job Category Status KPI

Use the HRI Training Attendance with Job Category Status KPI to notify different responsibilities when your training success for a job category falls below your target level. For example, you can notify all users with a senior management responsibility when the success of your training for a job category falls below 50%.

Business Questions

Tell me when training for a job category in my organization is unsuccessful, compared to my target for training success.

Target Comparisons

The HRI Training Attendance with Job Category Status KPI compares your KPI targets with the training hours of employees who:

- Are employed in the selected organization, and defined by the organization dimension at the date they were enrolled in the class.
- Have the enrollment status of Attended for a class.
- Are employed in the selected job category, and defined by the job category dimension, at the date they were enrolled in the class.

KPI Parameters

The HRI Training Attendance with Job Category Status KPI includes the following mandatory parameters:

- Business Plan
- HR Organization
- Job Category
- Start date
- End date

To understand how this KPI calculates training attendance success, see: Training Success Targets for KPIs, page 10-3

Related Topics

Training Attendance with Job Category KPI Status PMV Report, page 10-27

Workforce Intelligence for Learning Management Overview, page 10-2

Training Classes by Competence Report

Run this report from the Individual Competencies report.

This report enables you to investigate training classes that provide a selected competence. The report displays:

- Course time
- Competence level delivered

- Dates the course is run
- Class title
- Class status
- Places
- Venue
- Cost

Note: You can run this report only from the Individual Competencies report.

See Individual Competencies Report, page 7-11

Business Questions

Which training courses are aimed at improving a particular competency?

Parameters

You need to specify values for the following parameters:

- Competence

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Training Success Report

This report enables you to investigate how successfully employees are attending training courses for a particular organization, location, job, and job category. You can also display your Performance Management Framework (PMF) targets by selecting a business plan.

For a selected time period you can analyze:

- The number of hours you have spent training your employees.
- How many of these hours were recorded as successful by the training organization.

To be able to use this report you must have installed both Oracle HRMS and Oracle Learning Management (OLM). The report only includes training events (classes) that are managed using OLM.

The Training Success report uses a predefined FastFormula to calculate the number of hours in an event (class). You will need to customize the predefined formula if:

- The number of hours per time period do not match those of your enterprise.
- You have set up additional time periods to record the duration of events (classes).

Note: If you set up additional time periods using the predefined formula, these will not be converted to hours. If you want to include these time periods in the report, you must copy and amend the predefined formula.

See Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

Business Questions

How successful are my courses?

Parameters

You need to specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Business Plan
- Location
- Job Category
- Job
- Frequency
- Reporting Dates

Key Concepts

To get the most out of this report, you need to understand the following concepts:

Training Success

This report compares the number of hours employees have spent on training events (classes), and how many of these hours have been recorded as successful.

The report includes information only about training events (classes) that have been recorded using OLM. The report excludes any external training courses or internal training events (classes) not recorded using OLM.

Relevant Employees

The report includes the training hours only of employees who:

- Are employed in the selected organization at the date they enrolled in the event (class).
- Have the enrollment status of Attended for the event (class).
- Have an assignment that matches the report parameters you select.

When an employee enrolls in an event (class), their assignment is recorded. The report uses this assignment, regardless of whether or not the employee has subsequently changed their assignment.

Training event (class) Hours for Employees

The report calculates the total number of hours employees have spent in training events (classes). For a class to be included it must:

- Have been attended by an employee selected for the report.
- Have an end date prior to the present date.

- Have a class status of Normal or Closed, if the event (class) is scheduled.
- Not have been Cancelled.

The hours spent on each training event (class) are calculated then multiplied by the number of relevant employees who attended the course.

The Training Success report uses a predefined formula to calculate the number of hours in an event (class). Depending on how you record the duration of events (classes), you may need to customize this formula. See *Setting Up and Customizing Training Hours, Deploy Strategic Reporting (HRMSi)*

Successful Hours

If the student is recorded as successfully having attended the event (class), then the employee's hours for this event (class) are recorded as successful hours.

Block Bookings

You are not required to enter student details when you make bulk enrollments in OLM. Therefore, the report excludes any hours for an event (class) where students have been bulk enrolled in the event (class).

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

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.

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-25

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-13 as active if they have a current period of service, page Glossary-10 at the effective date, page Glossary-12

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.

Active Contingent Worker

DBI for HRMS counts a contingent worker, page Glossary-9 as active if they have a current period of placement , page Glossary-10 at the effective date, page Glossary-12.

If a contingent worker is suspended, DBI for HRMS still counts them as active. DBI for HRMS also uses the term Incumbent to refer to an active contingent worker.

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.

Agency

An external organization that assists an enterprise in their recruitment process. Agencies act on behalf of the candidates to help them search and apply for jobs. They provide candidates to the fill up job openings in an enterprise or sometimes handle the complete placement process for a vacancy.

Agency Candidate

An agency candidate is a person whose profile is created in iRecruitment by a recruiting agency. This profile includes personal and professional information.

Agency User

An external person who belongs to a recruiting agency and accesses iRecruitment to conduct recruiting activities such as creating candidates and applying on behalf of the candidates.

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.

Align

To define a relationship between objectives. Workers can align their own objectives with objectives that other workers have shared with them. Aligned objectives are also known as *supporting objectives*.

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-4.

Appraisee

The person who is the subject of an appraisal.

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-26

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-24

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.

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-27, *Field*, page Glossary-14

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-8

Cafeteria Benefits Plan

See: *Flexible Benefits Program*, page Glossary-14

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-28

Cascade

A process managers at each level in a hierarchy use to allocate their own objectives to workers who report directly to them. This technique enables the allocation of enterprise objectives in some form to all workers.

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.

Chief HR Officer

In DBI for HRMS the Chief HR Officer is the chief executive of the enterprise who can view the HR data at an enterprise-level.

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.

Competency

Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

See also: *Unit Standard Competency*, page Glossary-33

Competency Assessment Template

The entity that configures the Competencies section of an appraisal.

See also: *Objective Assessment Template*, page Glossary-21

Competency Evaluation

A method used to measure an employees ability to do a defined job.

Competency Profile

Where you record applicant and employee accomplishments, for example, proficiency in a competency.

Competency Requirements

Competencies required by an organization, job or position.

See also: *Competency*, page Glossary-8, *Core Competencies*, page Glossary-9

Competency 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: *Competency*, page Glossary-8

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.

Current Period of Placement

A contingent worker's period of placement, page Glossary-23 is current if their most recent placement start date is on or before the effective date, and either the contingent worker does not have a placement end date for their latest placement or their placement end date is later than the effective date.

Effective Date	Place Date	End Placement Date	Current Period of Placement?
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

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-11, *Effective Date*, page Glossary-12

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-12

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-34

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-17

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-14

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-11

EIT

See: *Extra Information Type*, page Glossary-14

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-27, *Nonrecurring Elements*, page Glossary-20

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-31

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.

End Placement Date

DBI for HRMS uses this term to specifically refer to the contingent worker's most recent placement end date prior to the effective date.

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-11

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-27

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-27, *Field*, page Glossary-14

Format Mask

A definition of a person-name format. The format mask comprises standard name components, such as title, first name, and last name, in an order appropriate to its purpose and legislation.

Format Type

A format-mask classification that identifies the mask's purpose. Oracle HRMS defines the Full Name, Display Name, List Name, and Order Name format types. You can also define your own format types for use in custom code.

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-22

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-15

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.

HR Staff

In DBI for HRMS the HR Staff are people who work in the Human Resources role. Chief HR Officers can track the ratio of HR professionals to the number of workers in their enterprise.

DBI for HRMS uses the HRI_MAP_JOB_JOB_ROLE formula to categorize workers into HR staff and non-HR staff.

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.

High Availability

iRecruitment functionality that enables enterprises to switch between two instances to continuously support the candidate job site.

Hire Date

In DBI for HRMS Hire Date is 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-11

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-27

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.

Objective Assessment Template

The entity that configures the Objectives section of the appraisal.

See also: **Competency Assessment Template**, page Glossary-8

Objectives Library

A collection of reusable objectives. HR Professionals can either create individual objectives in the Objectives Library or import them from an external source.

Off-Boarding

Descriptive term covering all HR processes and procedures involved in removing a worker from your organization, including termination, relocation, and long-term sickness.

OLM

Oracle Learning Management.

On-Boarding

Descriptive term covering all HR processes and procedures involved in hiring and integrating a worker in your organization, including recruitment, hiring, and orientation.

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.

Organization Manager Hierarchy

An HRMS structure that contains supervisors and subordinates on a reporting chain who also own organizations. HRMS uses this hierarchy to filter the information you display in report modules, such as the Daily Business Intelligence Workforce Budget Management dashboard, to include only managers who own organizations.

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-15

Pay Value

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

See also: *Input Values*, page Glossary-17

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 Plan

The entity that defines the performance-management process for a specified period. A component of the Workforce Performance Management function.

Performance Management Viewer (PMV)

A reporting tool that displays the report that corresponds to one or more PMF targets.

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 enterprise. A contingent worker can have only one period of placement at a time; however, a contingent worker can have multiple assignments during a single period of placement.

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.

Personal Scorecard

A collection of objectives for a single worker arising from a single Performance Management Plan.

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.

Placement Start Date

In DBI for HRMS Placement Date is the contingent worker's most recent start date prior to the effective date.

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-8

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

A worker's perceived level of expertise in a competency, in the opinion of an assessor, over a given period. For example, a worker may demonstrate the communication competency at Novice or Expert level.

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-22

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-8

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-30

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-4

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.

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-20, *Standard Link*, page Glossary-31

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-8

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-14

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-28

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-29, *User Profile Options*, page Glossary-33, *Request Groups*, page Glossary-28, *Security Groups*, page Glossary-28

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-28, *Security Profile*, page Glossary-29, *User Profile Options*, page Glossary-33

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-28

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-32

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-31

Social Insurance Number (SIN)

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

Source Deductions Return (TP 1015.3)

A Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

SSHR

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP

See: *Statutory Sick Pay*, page Glossary-31

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-12, *Recurring Elements*, page Glossary-27

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

A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

Statement of Remuneration and Expenses (TD1X)

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

Statutory Maternity Pay

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Statutory Sick Pay

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

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.

Supporting Objective

An objective aligned with another objective. Supporting objectives contribute to the achievement of the objectives they support.

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.

Transcensive

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 Competency

A competency 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-5

User Profile Options

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-28, *Security Profile*, page Glossary-29

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, page Glossary-13 or a contingent worker, page Glossary-9

In DBI for HRMS workers are employees and contingent workers who report to the selected manager.

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.

Workforce Performance Management

The Oracle HRMS functions that support enterprise-directed objective setting, management, and assessment.

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.

Index

A

- Absence Category parameter, 1-27
- Absence Summary by Manager report, 2-7
- Absence Summary by Manager Status report, 2-8
- alerts, 1-6
- analytics
 - Discoverer workbooks, 1-2
- Annualized Employee Turnover , 8-76
- Annualized Employee Turnover by Manager Status report, 8-74
- Annualized Employee Turnover Trend report, 8-77
- Annualized Turnover for Top 10 Countries report, 8-76
- Annualized Turnover for Top 4 Countries report, 8-75
- Area View By, 1-37
- Average Salary for Top 4 Countries Trend report, 3-27

B

- Budgets
 - counting workforce, 6-2
 - reporting, 6-2

C

- calculations
 - DBI, 1-17
- Change column, 1-28
- Chief HR Officer - Overview dashboard, 1-8
- Chief HR Officer - Turnover dashboard, 1-10
- Chief HR Officer- Headcount dashboard, 1-9
- columns
 - Change, 1-28
- Compare To parameter, 1-28
- Competencies
 - reporting, 7-2
- Contingent Worker Activity by Manager Status report, 8-98
- Contingent Worker Detail by Placement End report, 8-102
- Contingent Worker End Placement Detail report, 8-104
- Contingent Worker Placement Detail, 8-103

- Contingent Worker Ratio with Length of Placement Status report, 8-99
- Contingent Worker Transfer (Minus) Detail report, 8-105
- Contingent Worker Transfer (Plus) Detail report, 8-106
- Contingent Worker Trend report, 8-97
- Country parameter, 1-29
- Country view by, 1-37
- Currency parameter, 1-29

D

- Daily Business Intelligence for HRMS reports
 - Absence Summary by Manager , 2-7
 - Absence Summary by Manager Status, 2-8
 - Annualized Employee Turnover by Manager Status, 8-74
 - Annualized Employee Turnover Report, 8-76
 - Annualized Employee Turnover Trend, 8-77
 - Annualized Turnover for Top 10 Countries , 8-76
 - Annualized Turnover for Top 4 Countries, 8-75
 - Average Salary for Top 4 Countries Trend, 3-27
 - Contingent Worker Activity by Manager Status, 8-98
 - Contingent Worker Detail by Placement End , 8-102
 - Contingent Worker End Placement Detail, 8-104
 - Contingent Worker Placement Detail, 8-103
 - Contingent Worker Ratio with Length of Placement Status, 8-99
 - Contingent Worker Transfer (Minus) Detail, 8-105
 - Contingent Worker Transfer (Plus) Detail, 8-106
 - Contingent Worker Trend, 8-97
 - Employee Absence by Category Trend, 2-10
 - Employee Absence Detail, 2-11
 - Employee Absence Duration by Category , 2-8
 - Employee Absence Summary by Category Status, 2-9
 - Employee Absence Trend , 2-7
 - Employee Activity by Manager Status, 8-78
 - Employee Detail , 3-21

- Employee Headcount and Salary Trend, 3-22
- Employee Headcount Budget Trend, 6-7
- Employee Hire Detail, 8-80
- Employee Ratio by Length of Service Trend, 8-81
- Employee Ratio by Performance Band Trend, 8-81
- Employee Ratio with Length of Service Status, 8-82
- Employee Ratio with Performance Band Status, 8-83
- Employee Summary Status, 8-87
- Employee Termination Detail, 8-86
- Employee Termination Status, 8-88
- Employee Terminations by Job Functions, 8-89
- Employee Terminations with Length of Service Status, 8-90
- Employee Transfer (Minus) Detail Detail, 8-84
- Employee Transfer (Plus) Detail report, 8-85
- Employee Turnover Detail, 8-91
- Employee Turnover Ratio by Performance Band Trend, 8-92
- Employee Turnover Ratio with Performance Band Status, 8-93
- Employee Turnover Summary Status, 8-94
- Employee Voluntary Terminations, 8-95
- Employees for Top 4 Countries Trend, 8-80
- Headcount and Salary for Top 10 Countries, 3-22
- Headcount Distribution by Organization, 6-11
- HR Ratio Detail, 8-96
- HR Staff Ratio by Country , 8-96
- Labor Cost Distribution by Element, 6-9
- Labor Cost Distribution by Funding Source, 6-10
- Labor Cost Distribution by Organization, 6-8
- Labor Cost Distribution by Position, 6-9
- Labor Cost with Headcount Trend, 6-11
- Length of Placement Ratio Trend, 8-101
- Length of Placement Trend, 8-100
- Salary by Job Family Status, 3-26
- Salary by Job Function Status, 3-25
- Salary by Manager Status, 3-23
- Staff Transfer (Minus) Detail, 8-108
- Staff Transfer (Plus) Detail, 8-109
- Worker Detail , 8-101
- Workforce Activity by Manager Status, 8-106
- Workforce Occupancy Details, 6-10
- Workforce Ratio Trend, 8-110
- Data Warehouse Module
 - Discoverer workbooks, 1-3
 - See also* workbooks, EDW
- DBI
 - HR Management page, 1-3
- DBI calculations, 1-17
- DBI dashboard
 - Chief HR Officer - Overview, 1-8
 - Chief HR Officer - Turnover, 1-10

- Chief HR Officer- Headcount, 1-9
- Employee Absence Management, 1-16
- HR Management - Headcount, 1-12
- HR Management - Overview, 1-11
- HR Management - Turnover, 1-13
- Open Enrollment Management, 1-15
- Workforce Budget Management, 1-14
- DBI for HRMS troubleshooting, 1-38
- DBI parameters, 1-26
- diagnostics
 - data, 1-43
- Discoverer
 - end user layer, 1-2
 - workbooks, 1-2

E

- Effective Date parameter, 1-30
- Embedded Data Warehouse, 1-3
- Employee Absence by Category Trend report, 2-10
- Employee Absence Detail report, 2-11
- Employee Absence Duration by Category report, 2-8
- Employee Absence Management dashboard, 1-16
- Employee Absence Summary by Category Status report, 2-9
- Employee Absence Trend report, 2-7
- Employee Activity by Manager Status report, 8-78
- Employee Detail report, 3-21
- Employee Headcount and Salary Trend report, 3-22
- Employee Headcount Budget Trend report, 6-7
- Employee Hire Detail report, 8-80
- Employee Ratio by Length of Service Trend report, 8-81
- Employee Ratio by Performance Band Trend report, 8-81
- Employee Ratio with Length of Service Status report, 8-82
- Employee Ratio with Performance Band Status, 8-83
- Employee Summary Status report, 8-87
- Employee Termination Detail report, 8-86
- Employee Termination Status report, 8-88
- Employee Terminations by Job Functions report, 8-89
- Employee Terminations with Length of Service Status report, 8-90
- Employee Transfer (Minus) Detail report, 8-84
- Employee Transfer (Plus) Detail report, 8-85
- Employee Turnover Detail report, 8-91
- Employee Turnover Ratio by Performance Band Trend report, 8-92
- Employee Turnover Ratio with Performance Band Status Report , 8-93
- Employee Turnover Summary Status report, 8-94
- Employee Voluntary Terminations report, 8-95

Employees for Top 4 Countries Trend report, 8-80
enterprise
 select reporting area, 8-2
 select reporting area example, 8-3
events
 excluded, 1-38

H

Headcount and Salary for Top 10 Countries, 3-22
Headcount Distribution by Organization, 6-11
hierarchies
 Job, 1-30
 Manager, 1-33
 Time, 1-34
HR Management - Headcount dashboard, 1-12
HR Management - Overview , 1-11
HR Management - Turnover dashboard, 1-13
HR Ratio Detail report, 8-96
HR Staff Ratio by Country report, 8-96
HRMSi (DBI) Diagnostics Data Setup report, 1-43
HTML reports, 1-3
 Absence Hours, 2-3
 Average Salary By Group, 3-3
 Average Salary Trend, 3-4
 Competence Levels, 7-9
 Employee Budget Trend, 6-5
 Group Competencies, 7-9
 Hours Worked, 2-6
 Individual Competencies, 7-11
 Organization Budget (Employee) Status, 6-6
 Organization Separation, 8-73
 Organization Workforce, 4-2
 Recruitment Success, 9-31
 reporting dates, 1-7
 Salary and Grade Range, 3-5
 Salary Component Trend, 3-5
 Salary Spread, 3-6
 Separations By Competency, 8-66
 Separations By Leaving Reason, 8-67
 Separations By Service Bands, 8-67
 Separations Trend By Leaving Reason, 8-68
 Separations Trend By Service Band, 8-68
 Workforce Comparison, 8-68
 Workforce Gains, 8-69
 Workforce Losses, 8-70
 Workforce Ratio, 8-71
 Workforce Summary Analysis, 8-72

J

job categories, 8-4
Job Family parameter, 1-30
Job Family view by, 1-37
Job Function parameter, 1-31
Job Function view by, 1-37
Job hierarchy, 1-30

K

key concepts
 absence hours reporting, 2-2
 competencies, qualifications, and development intelligence, 7-2
 grade annualization for reporting, 3-2
 leave and absence management intelligence, 2-2
 people budgets and costing intelligence, 6-2
 people management intelligence, 8-2
 recruiting and hiring intelligence, 9-2
 salary and assignment reporting, 3-2
 salary annualization for reporting, 3-2
 salary currencies, 3-2
 salary, grades, and pay administration intelligence, 3-2
 working hours reporting, 2-2
Key Performance Indicators, 1-2, 1-5
 See also KPIs
 Chief HR Officer - Overview dashboard, 1-8
 Chief HR Officer - Turnover, 1-10
 Employee Absence Management- Overview dashboard, 1-16
 HR Management - Headcount dashboard, 1-9, 1-12
 HR Management dashboard, 1-13
 HR Management Overview dashboard, 1-11
 Open Enrollment Status dashboard, 1-16
 Workforce Budget Management Dashboard, 1-15
KPIs
 HRI Employee Count Status, 8-55
 HRI Employee Count with Job Category Status, 8-57
 HRI Employee Separation Status, 8-58
 HRI Employee Separation with Job Category Status, 8-62
 HRI Recruitment Success (Starts) Status, 9-29
 HRI Recruitment Success (Starts) with Job Category Status, 9-30
 HRI Salaries Varying From Grade Mid Point, 3-20
 HRI Workforce Assignment Count Above Grade Mid Point, 3-20
 HRI Workforce Assignment Count Below Grade Mid Point, 3-20
 HRI Workforce Full Time Equivalent (Job Category), 8-64
 HRI Workforce Head Count (Job Category), 8-65
 HRI Workforce Headcount, 8-63
 HRI Workforce Separation Full Time Equivalent by Rolling Month, 8-60
 HRI Workforce Separation Headcount by Rolling Month, 8-60
 list of, 1-5
 targets, 1-7

L

Labor Cost Distribution by Element, 6-9
Labor Cost Distribution by Funding Source, 6-10
Labor Cost Distribution by Organization, 6-8
Labor Cost Distribution by Position, 6-9
Labor Cost with Headcount Trend, 6-11
Leaving Reason parameter, 1-31
Leaving Reason view by, 1-37
Length of Placement Band parameter, 1-32
Length of Placement Ratio Trend report, 8-101
Length of Placement Trend report, 8-100
Length of Service Band parameter, 1-32
Length of Service Band view by, 1-37

M

Manager hierarchy, 1-33
Manager parameter, 1-32
Manager view by, 1-38

O

Open Enrollment Management , 1-15

P

Parameters
 program, 1-35
 Staff, 1-35
parameters
 Absence Category, 1-27
 Compare To, 1-28
 Country, 1-29
 Currency, 1-29
 DBI, 1-26
 Effective Date, 1-30
 Job Family, 1-30
 Job Function, 1-31
 Leaving Reason, 1-31
 Length of Placement Band, 1-32
 Length of Service Band, 1-32
 Manager, 1-32
 Performance Band, 1-33
 Period, 1-33
 Termination Category, 1-36
 View By, 1-36
Performance Band parameter, 1-33
Performance Band view by, 1-38
Performance Management Framework, 1-2, 1-5
Performance Management Viewer
 reports, 1-6
Performance Management Viewer reports, 1-2
 See also PMV reports
Period parameter, 1-33
PMV reports
 Employee Count KPI Status, 8-55
 Employee Count with Job Category KPI Status, 8-56

Employee Separation KPI Status, 8-58
Employee Separation with Job Category KPI Status, 8-61
Recruitment Success (Hires) KPI Status, 9-28
Recruitment Success (Hires) with Job Category KPI Status, 9-30
Salary Distribution Within Grade Range KPI, 3-19, 3-20
Workforce Count KPI Status, 8-63
Workforce Count Status (Job Category) KPI, 8-64
Workforce Separation by Rolling Month – Status KPI, 8-59

proficiencies
 reporting, 7-2
Program parameter, 1-35

R

reports
 HRMSi (DBI) Diagnostics Data Setup, 1-43

S

Salary by Job Family Status report, 3-26
Salary by Job Function Status report, 3-25
Salary by Manager report, 3-23
Staff parameter, 1-35
Staff Transfer (Minus) Detail report, 8-108
Staff Transfer (Plus) Detail Detail report, 8-109

T

Termination Category parameter, 1-36
Termination Category view by, 1-38
Time hierarchy, 1-34
Time view by, 1-38
troubleshooting, 1-38

V

View By parameter, 1-36
view bys
 Area, 1-37
 Country, 1-37
 Job Family, 1-37
 Job Function, 1-37
 Leaving Reason, 1-37
 Length of Service Band, 1-37
 Manager, 1-38
 Performance Band, 1-38
 Termination Category, 1-38
 Time, 1-38

W

workbooks
 analytics

Competence Levels (Organization Hierarchy) Detail Analytics, 7-2
 Competence Match (Organization Hierarchy) Status Analytics, 7-4
 Employee Absence Hours (Organization Hierarchy) Trend Analytics, 2-3
 Employee Hours Worked (Organization Hierarchy) Trend Analytics, 2-5
 Employee Salary (Organization Hierarchy) Trend Analytics, 3-7
 Employee Salary and Grade Range (Organization Hierarchy) Detail Analytics, 3-11
 Employee Salary by Group (Organization Hierarchy) Status Analytics, 3-14
 Employee Salary Component (Organization Hierarchy) Trend Analytics, 3-9
 Employee Salary Spread (Organization Hierarchy) Detail Analytics, 3-17
 Vacancy Hire Success (Organization Hierarchy) Status Analytics, 9-9
 Vacancy Hire Success (Organization Hierarchy) Trend Analytics, 9-11
 Workforce Count (Organization Hierarchy) Trend Analytics, 8-5
 Workforce Count by Job Category (Organization Hierarchy) Trend Analytics, 8-22
 Workforce Count Change (Organization Hierarchy) Status Analytics, 8-6
 Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics, 8-20
 Workforce Gain (Organization Hierarchy) Status Analytics, 8-25
 Workforce Gain (Organization Hierarchy) Trend Analytics, 8-26
 Workforce Loss (Organization Hierarchy) Status Analytics, 8-31
 Workforce Loss (Organization Hierarchy) Trend Analytics, 8-32
 Workforce Separation by Competence (Organization Hierarchy) Status Analytics, 8-8
 Workforce Separation by Competence (Organization Hierarchy) Trend Analytics, 8-10
 Workforce Separation by Length of Work (Organization Hierarchy) Status Analytics, 8-12
 Workforce Separation by Length of Work (Organization Hierarchy) Trend Analytics, 8-13
 Workforce Separation by Reason (Organization Hierarchy) Status Analytics, 8-14
 Workforce Separation by Reason (Organization Hierarchy) Trend Analytics, 8-16
 analytics templates
 Vacancy Hire Success (Organization Hierarchy) Template Analytics, 9-13
 Workforce Count (Organization Hierarchy) Template Analytics, 8-23
 Workforce Gain (Organization Hierarchy) Template Analytics, 8-28
 Workforce Loss (Organization Hierarchy) Template Analytics, 8-34
 Workforce Separation (Organization Hierarchy) Template Analytics, 8-17
 Applicant Time to Start Comparison, 9-4
 Application Termination Analysis, 9-5
 Applications Analysis, 9-5
 EDW
 Recruitment by Authorizer Analysis, 9-15
 Recruitment by Recruiter Analysis, 9-19
 Workforce Assignment Activity Analysis, 8-43
 Workforce Composition Analysis, 8-45
 Workforce Planning Summary Analysis, 8-47
 Workforce Recruitment Stage Analysis, 9-22
 Workforce Separation Analysis, 8-51
 Employee Budget Status, 6-3
 Employee Budget Trend, 6-2
 Employee Movement by Organization Analysis, 8-37
 Employee Primary Assignment Count (by Location and Employment Category) Comparison, 8-39
 Employee Primary Assignment Count (by Organization and Employment Category) Comparison, 8-41
 Employee Salary by Job and Grade Status, 3-15
 Recruitment Efficiency Analysis, 9-7
 Salary Survey Comparison, 3-19
 Worker Detail report, 8-101
 workforce, 1-5
 count, 8-2
 gains and losses, 8-2
 Workforce Activity by Manager Status report, 8-106
 Workforce Budget Management Dashboard, 1-14
 Workforce Occupancy Details, 6-10
 Workforce Ratio Trend report, 8-110

