

Oracle® Human Resources Management Systems

Deploy Strategic Reporting (HRMSi)

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Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi), Release 12

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Contents

Send Us Your Comments

Preface

1 Administer Strategic Reporting

Strategic Reporting Overview	1-1
What is Strategic Reporting?	1-4
Strategic Reporting Key Concepts	1-6
Responsibilities for Strategic Reporting.....	1-6
Workforce.....	1-7
HRMS Intelligence Key Performance Indicators.....	1-7
Discoverer Analytics	1-11
Discoverer Analytics Overview.....	1-11
Analytics Business Areas.....	1-11
The Data Warehouse Module	1-13
Data Warehouse Module Overview.....	1-13
Data Warehouse Module Responsibilities.....	1-13
Daily Business Intelligence for HRMS	1-14
Daily Business Intelligence for HRMS Overview.....	1-14
DBI Responsibilities and Roles.....	1-15
DBI for HRMS Data Security.....	1-16
How DBI for HRMS Derives Report Values.....	1-17
How DBI for HRMS Parameters Affect Reports.....	1-28
Troubleshooting DBI for HRMS Reports.....	1-42
DBI for HRMS Diagnostics Reports.....	1-47
Information for Non-DBI for HRMS Customers.....	1-49

2 Implement Strategic Reporting

Implementation Checklist (HRMSi).....	2-1
Implementation Flowcharts (HRMSi).....	2-2
Implement Discoverer Workbooks.....	2-7
Implement Key Performance Indicators.....	2-10
Implement the Data Warehouse Module.....	2-10
Implement People Management Dashboards.....	2-14
Implement Workforce Budget Management Dashboard.....	2-21
Implement Open Enrollment Management Dashboard.....	2-24
Implement Employee Absence Management Dashboard.....	2-26
Technical Essays.....	2-30
Data Warehouse Module Technical Essays.....	2-30
Example Configuration Script.....	2-30

3 Deploy Strategic Reporting

Deploy Strategic Reporting.....	3-2
Programs to Populate HRMSi Strategic Reports.....	3-2
Deploy Discoverer Analytics.....	3-7
Deploy Discoverer Analytics Overview.....	3-7
Setting Up Geography.....	3-7
Defining Areas, Countries, and Regions.....	3-8
Assigning Areas, Countries, and Regions.....	3-8
Setting Up a Region Segment.....	3-9
Assigning a Region to a Location.....	3-9
Mapping the Region Flexfield Segment to the Geography Dimension.....	3-10
Setting Up and Configuring Training Hours.....	3-11
Amending Default Training Hours.....	3-12
Adding Additional Training Time Periods.....	3-13
Setting Up and Configuring Working Hours.....	3-14
Creating Database Items for Working Hours Input Values.....	3-17
Adapting the Hours Worked Workbook.....	3-18
Populating the Competence Level Hierarchy.....	3-18
Populating Job Competence Requirements.....	3-19
Populating the Time Dimension for Analytics.....	3-20
Populating the Geography Dimension.....	3-21
Deploy the Data Warehouse Module.....	3-23
Deploy the Data Warehouse Module.....	3-23
Programs to Populate the Data Warehouse Module.....	3-23
Standard Data Warehouse Configuration.....	3-25

Job Category Sets.....	3-28
Configuring Age Bands.....	3-29
Configuring Period of Work Bands.....	3-30
Configuring Job Category Sets.....	3-31
Configuring Person Types.....	3-33
Populating Facts and Dimensions.....	3-35
Deploy Daily Business Intelligence for HRMS.....	3-37
Deploy Daily Business Intelligence for HRMS.....	3-37
Programs to Populate DBI Base Summary Tables.....	3-37
Checking System Profiles	3-44
Managing Multi-Threading.....	3-48
Defining Separation Categories.....	3-49
Categorizing Separation Reasons.....	3-50
Loading Separation Reasons.....	3-52
Setting Up the Job Hierarchy.....	3-52
Structuring the Job Hierarchy.....	3-55
Checking the Job Hierarchy Setup	3-55
Checking the Job Hierarchy Structure Setup.....	3-56
Checking the Job Hierarchy database setup.....	3-56
Setting Up Job Roles.....	3-56
Setting Up the Length of Work Bands.....	3-58
Setting Up the Period of Placement Bands.....	3-59
Setting Up Performance Bands.....	3-59
Creating a Formula for Performance Review Ratings.....	3-61
Creating a Formula for Performance Appraisal Ratings.....	3-62
Updating the Performance Banding Bucket.....	3-63
Setting Up Area Geography Dimension.....	3-64
Categorizing Workers.....	3-65
Enabling the Payroll Events Model.....	3-67
Ensuring Triggers are Activated for all Business Groups	3-69
Running the Diagnostics Setup Reports.....	3-70
Populating the Time Dimension.....	3-71
Populating the DBI for HRMS Base Summary Tables	3-72

HRMS Glossary

Index

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Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi), Release 12 Part No. B31655-02

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Preface

Intended Audience

Welcome to Release 12 of the *Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)*.

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.
- The Oracle Applications graphical user interface.

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

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

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Structure

- 1 Administer Strategic Reporting**
- 2 Implement Strategic Reporting**
- 3 Deploy Strategic Reporting**
- 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 data, 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 Daily Business Intelligence for HRMS User Guide

This guide describes the dashboards and reports available for HR Line Managers, Chief HR Officer, Budget Managers, and Benefits Managers using Daily Business Intelligence for HRMS. It includes information on using parameters, how DBI for HRMS derives values, and how to troubleshoot dashboards and reports.

Oracle Daily Business Intelligence for HRMS Implementation Guide

This guide provides basic setup procedures for implementing and maintaining HRMS-related dashboards.

Oracle Daily Business Intelligence Implementation Guide

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

Oracle Daily Business Intelligence User Guide

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

Oracle Application Framework Personalization Guide

Learn about the capabilities of the OA 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 Guide

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 implement Oracle HRMS successfully in your enterprise.

Oracle Human Resources Management Systems FastFormula User Guide

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

Oracle Self-Service Human Resources Deploy Self-Service Capability Guide

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

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

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

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications.

Oracle Human Resources Management Systems Window Navigation and Reports Guide

This guide lists the default navigation paths for all windows and the default reports and processes as they are supplied in Oracle HRMS.

Oracle iRecruitment Implementation and User Guide

Set up and use Oracle iRecruitment to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

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 12. 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.

Oracle Applications Installation Guide: Using Rapid Install

This guide provides instructions for managing the installation of Oracle Applications products. Oracle Rapid Install 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.

Oracle Applications Upgrade Guide: Release 11i to Release 12

Refer to this guide if you are upgrading your Oracle Applications Release 11i products to Release 12. This guide describes the upgrade process and lists database and product-specific upgrade tasks.

Oracle Applications Maintenance Procedures and Oracle Applications Maintenance Utilities

Use these guides to help you run the various AD utilities (such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, and License Manager) and maintain the Oracle applications file system and database.

Oracle Applications System Administrator's Guides

These guides (Configuration, Maintenance, and Security) provide planning and reference information for the Oracle Applications System Administrator. They describe 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 Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

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

on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

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

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

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.

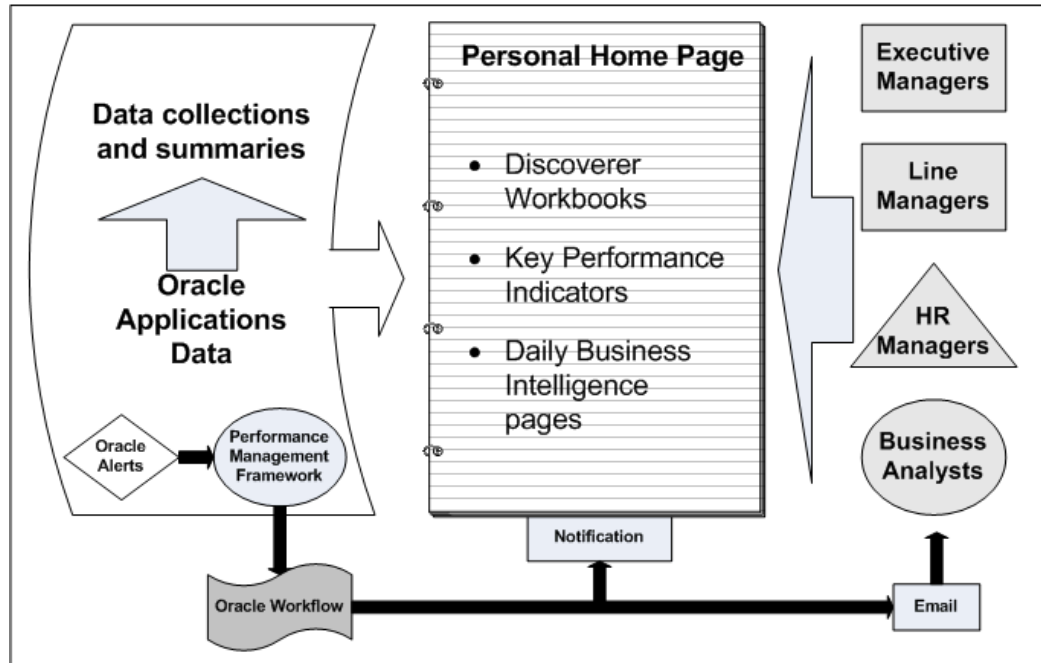
Administer Strategic Reporting

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

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*, page 1-11

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 the 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.

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 Daily Business Intelligence for HRMS User Guide*.

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

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

Responsibilities for Strategic Reporting

When accessing Human Resources secure folders in Discoverer, users will only be able to see data if they have a valid HRMS responsibility, that is, a responsibility that is registered to the HRMS suite. Therefore, before users access HRMSi reports, you must ensure that Human Resources security has been set up and that valid HRMS responsibilities have been assigned to those users.

Important: Unless you assign a valid HRMS responsibility to users, they will not be able to see any organization data.

HRMSi provides four standard responsibilities. These are:

- **Human Resources Intelligence – Administrator (OLTP)**

The existing Human Resources responsibility does not, by default, include all HRMSi reports and workbooks, since some workbooks are for administrative purposes. However, the Human Resources Intelligence – Administrator (OLTP) responsibility provides a full list of all reports, workbooks, and KPIs, apart from those in the data warehouse module. This responsibility is for use by system administrators; it should not be accessible to users.

- **Human Resources Intelligence – End User**

The Human Resources Intelligence – End User responsibility provides an example template of how the administrator may want to present reports to users.

- **Human Resources Intelligence – Analytics User**

The Human Resources Intelligence – Analytics User responsibility provides access to all the analytics reports.

- **Human Resources Intelligence – Embedded Data Warehouse**

The Human Resources Intelligence – Embedded Data Warehouse responsibility provides a full list of all workbooks in the data warehouse module.

Note: These responsibilities exclude all of the Daily Business Intelligence content, which has its own responsibility. See: DBI responsibilities and roles, page 1-15

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

KPI Name	Report Name
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*

Discoverer Analytics

Discoverer Analytics Overview

The HRMSi Discoverer Analytics workbooks and end user layer provide you with high level summary reports that track trends and statuses across a wide range of data. These workbooks enable you to compare your workforce activity across, for example, periods of time, organizational structures, or across types of employees or jobs.

To provide these high level summaries and comparisons, the analytics workbooks and end user layer rely on summarized data structures that are similar to the structures used in data warehousing. The summary data structures hold pre-calculated data. HRMSi provides a set of programs that you use to populate the summary structures with calculated data from your HRMS transactional tables. You can run the programs as often as you wish to keep the summary data up to date. See: Programs to Populate HRMSi Strategic Reports, page 3-2

HRMSi also provides analytics templates. You can use these templates to extend your range of analytics reports. To use the templates, you require a basic understanding of the following:

- Oracle Discoverer
- The principles of Online Analytical Processing (OLAP)
- The principles of data warehousing

Analytics Business Areas

The HRMSi Analytics reports are based on a Discoverer end user layer (EUL). The analytics EUL provides folders that access the data from summary tables as well as the HRMS transactional tables. You can use these folders to create your own analytics reports. The analytics end user layer organizes the folders into three business areas, as described below.

- **HRMSi – Administration – Analytic Dimensions**

This business area holds the dimension folders for analytics reporting.

- **HRMSi – Administration – Analytic Facts**

This business area holds the facts folders for analytics reporting.

- **HRMSi – Administration – Analytic Components**

This business area holds the component folders, such as lists and levels, for analytics reporting.

Some of the folders in the analytics business areas hold collected data. This is indicated in the folder name.

The analytics folders are for use by experienced developers who have an understanding of data warehouse structures.

The Data Warehouse Module

Data Warehouse Module Overview

To complement the transactional reporting capability, HRMSi allows you to report on your HRMS data using a data warehouse component. The data warehouse component of HRMSi offers you a number of Discoverer workbooks based on data warehouse facts and dimensions.

This module collects human resources data into a number of facts and dimensions (data warehouse structures). The facts are the actual data that the end user is 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. This structuring improves report performance. The data used here 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. The administrator will determine how often the data needs to be collected.

See: Processes to Populate the Data Warehouse Module, page 3-23

Data Warehouse Module Responsibilities

HRMSi provides two responsibilities for administrating the Data Warehouse Module. These are:

- Global Warehouse Administrator
- Site Warehouse Administrator

Daily Business Intelligence for HRMS

Daily Business Intelligence for HRMS Overview

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

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

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

- **Chief HR Officer - Overview**
- **Chief HR Officer - Headcount**
- **Chief HR Officer - Turnover**
- **HR Management – Overview**
- **HR Management – Turnover**
- **HR Management – Headcount**
- **Contingent Worker Management**
- **Workforce Budget Management**
- **Open Enrollment Management**
- **Employee Absence Management**

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

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

Common concepts

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

- DBI Responsibilities, page 1-15
- DBI for HRMS Data Security, page 1-16
- How DBI for HRMS Derives Report Values, page 1-17
- How DBI for HRMS Parameters Affect Reports, page 1-28
- Troubleshooting DBI for HRMS Reports, page 1-42

DBI Responsibilities and Roles

The following table shows the DBI responsibilities and the dashboards that you can access using the responsibilities:

Responsibilities	Dashboards
HR Line Manager	HR Management - Overview
Daily HR Intelligence	HR Management - Headcount
	HR Management - Turnover
	Contingent Worker Management
	Employee Absence Management
Workforce Budget Manager	Workforce Budget Management
Benefits Manager	Open Enrollment Management
Chief HR Officer	Chief HR Officer - Overview
	Chief HR Officer - Headcount
	Chief HR Officer - Turnover
	Contingent Worker Management
	Employee Absence Management

These responsibilities provide access to all of the associated regions and underlying reports. The reports provide information about subordinate managers found on the

supervisor hierarchy. Users who access the dashboards using the HR Line Manager and Daily HR Intelligence can only view the information in their management hierarchy. The Workforce Budget Management dashboard adds an additional filter, using an organization manager hierarchy that restricts the Manager list to display only subordinate managers who own organizations.

Enterprise Level Responsibility

Chief HR Officer

You can access the Chief HR Officer dashboards using the Chief HR Officer responsibility and view the associated KPIs, regions, and reports. This responsibility provides an enterprise level view of key HRMS metrics to help the chief HR officer or head of HR to understand the HR operations in the organization.

Roles

You can delegate access to specific routine tasks and reports to other staff, for example, line or HR managers, using the Daily HR Intelligence and Workforce Budget Manager roles. When you delegate a role, the recipient can log in with the same level of access as the manager, and view the data in the manager's hierarchy using a selected set of dashboards and reports. You can delegate a role for a limited time period. This feature is useful for sharing a large volume of routine HR transactions.

The following DBI for HRMS dashboards use the delegate roles feature:

- HR Management – Overview
- HR Management - Headcount
- HR Management - Turnover
- Contingent Worker Management
- Employee Absence Management
- Workforce Budget Management

The ability to grant roles to other users is part of Oracle Applications' role-based security. See: *Oracle Applications System Administrator's Guide - Security*.

Use the Administer Roles function of the Daily Business Intelligence Administrator responsibility to delegate roles. You can use the List of Grants page to review the existing delegations and then navigate to the Grant Roles page to delegate roles. The Associated Reports column helps you view a list of the reports delegated with a role.

DBI for HRMS Data Security

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

secure data.

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

Once logged in, you can view information about your subordinates in the supervisor hierarchy, but not information about your supervisor or peer managers. To view the HR data at the enterprise level, log in to the application using the Chief HR Officer responsibility. For information on enabling the CEO view for Chief HR Officer, see: Implement DBI for HRMS - People Management, *Daily Business Intelligence for HRMS Implementation Guide*

For the Open Enrollment Status dashboard, the application controls security at the responsibility level, based on the Benefits Manager responsibility that your system administrator assigns to the appropriate users.

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

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-43 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-43 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.

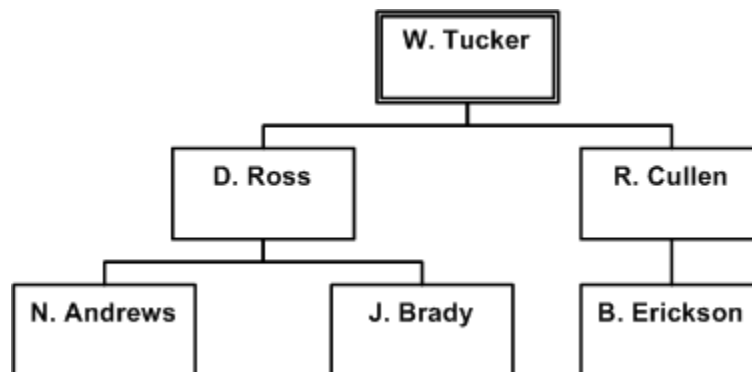
DBI counts transfers in and out of a manager hierarchy on the day the worker starts work for a new manager.

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.

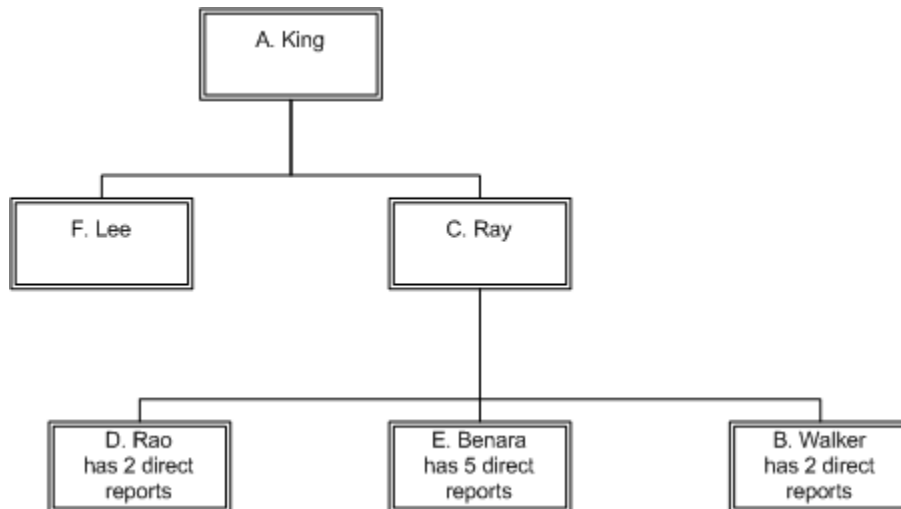
DBI for HRMS does not count transfers within a manager's hierarchy, since they are of no interest to that manager. For example:



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 1-45

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-21.

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-31

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-41. 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 1-46

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-17. 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 1-46

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-2, DBI for HRMS calculates their length of service from their hire date, page Glossary-21 to the effective date, page Glossary-16. 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-41.

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-31 to the effective date, page Glossary-16. 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 1-32, using the GL Daily Rates as at the effective date, page Glossary-16.

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 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.

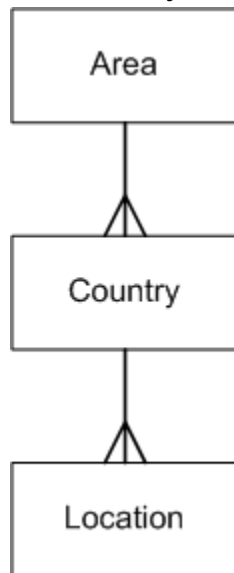
The default value for this parameter is All.

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 Daily Business Intelligence Implementation Guide*.

For further information on this parameter see: Currency Parameter in *Oracle Daily Business Intelligence Implementation 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: *Oracle Daily Business Intelligence Implementation Guide*

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 1-36 parameters.

For further information on this parameter see: Date Parameter in *Oracle 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 1-33

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

families.

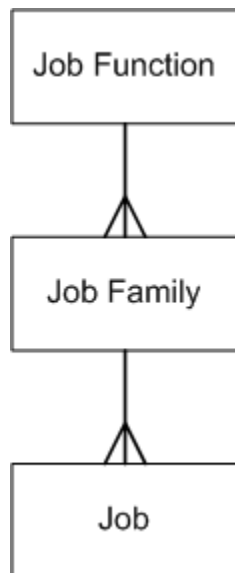
When displaying values for All job families, reports use an Unassigned category to display information for assignments with no job, or with a job that is not linked to a selected job function/family.

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 1-33

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 1-39

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 1-23

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 1-23

Manager

This parameter displays a list of managers, page Glossary-25 within your Manager hierarchy, page 1-35. 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 1-42

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 1-24

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 1-32 and Compare To, page 1-30 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:

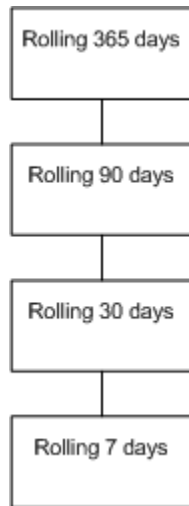
- **Rolling 7 Days:** displays data for 13 dates at 7-day consecutive intervals, ending with the effective date.
- **Rolling 30 Days:** displays data for 12 dates at 30-day consecutive intervals, ending with the effective date.
- **Rolling 90 Days:** also depends on the value you select in the Compare 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 1-42

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-40 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 1-33 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 1-33 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-25 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 1-36

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 1-36, 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.

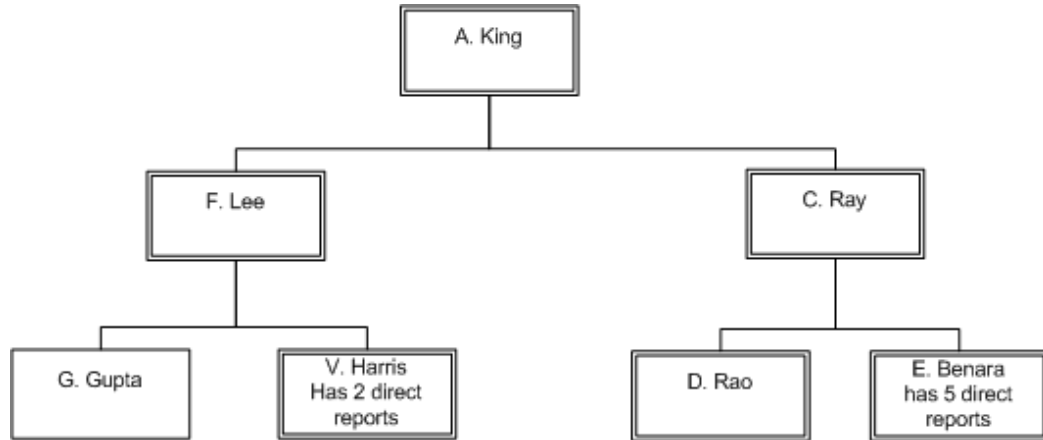
When the Hire, Termination, and Transfer Totals Don't Tally

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.

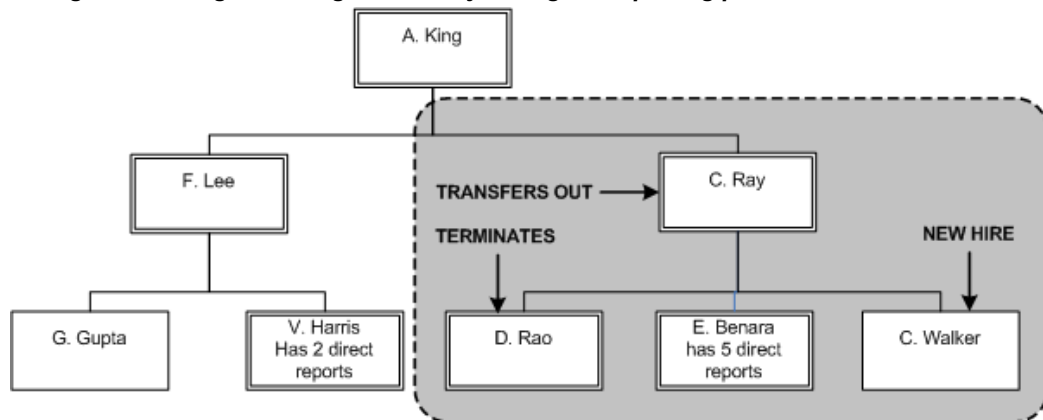
A. King's hierarchy at the start of the reporting period



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	Terminatio ns	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.

DBI for HRMS Diagnostics Reports

DBI for HRMS provides a diagnostics tool that analyzes your user data and system setup, and reports on potential problems that can affect the DBI reports. The diagnostics tool comprises two reports:

For instructions on running these reports, see *Running the Diagnostics Setup Reports*, page 3-70

HRMSi (DBI) Diagnostics System Setup Report

Prior to running any HRI collection programs, it is important to ensure that DBI for HRMS setup is correct. The aim of the Diagnostics System Setup report is to examine the DBI for HRMS setup and to recommend actions in case of failures.

The report provides information on the following areas of DBI for HRMS setup:

- Profile option settings, and the impact on reporting if you have not set them correctly
- Formulas and dynamic triggers, such as whether they are present where necessary and whether they are enabled and generated
- DBI tables, such as whether the collection programs have successfully populated them
- The structure of Job and Geography hierarchies

If the set up is incorrect, the report recommends appropriate actions.

Run this report at any time during your setup of DBI for HRMS. Run it regularly during DBI for HRMS operations to check your system remains set up correctly.

HRMSi (DBI) Diagnostics Data Setup Report

The Diagnostics Data Setup report tells you about your collected 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.

Note: However, the Diagnostics Data Setup report for the Open Enrollment Management dashboard is unaffected by the mode.

Information for Non-DBI for HRMS Customers

The following issues affect HRMS customers who do not use Daily Business Intelligence:

Foundation HR Installation

In a Foundation HR installation the data held on the HR systems is very limited compared with a full HR installation. As a result the data collected by DBI for HRMS processes is very limited:

- HRMS date track (historical changes) not held for assignments.
- PYUGEN not supported.
- Fast Formula not supported.
- Assignment Budget Values not supported.
- Salary related information not collected.
- Historical information not collected.

Non-DBI for HRMS customers, who do not require any more than the basic data collected in a Foundation HR implementation, can set the HRI:DBI Force Foundation HR Processes profile option to Yes. This setting reduces the amount of data collected and improves load times, although functionality is restricted as outlined above.

Full HR Installation

Non-DBI for HRMS customers on a Full HR Installation should review and set the following profile options:

- If you never run the Assignment Events process, set HRI:Populate Assignment Events Queue to No.
- If you never run the Supervisor Hierarchy process, set HRI:Populate Supervisor Hierarchy Events Queue to No.
- If you never run the Supervisor Status History process, set HRI:Populate Supervisor Status History Events Queue to No.

The above settings reduce the load times of other processes.

Implement Strategic Reporting

Implementation Checklist (HRMSi)

This checklist provides you with a description of the HRMSi modules you can install. Some of these modules require you to have previously installed the Workforce Intelligence HRMS reports. See the Post Install Steps for more details.

☐ Daily Business Intelligence for HRMS, page 2-14 (Optional)

Includes HR Management dashboards and reports. The HR Management dashboards displays high level summary regions that track changes in your workforce over time for managers within your supervisor hierarchy. From the HR Management dashboards, you can drill down to detailed reports. For benefits administrators, the Open Enrollment Status dashboard provides statistics about your open enrollment period, including the number of enrolled participants, life events statuses, and open action items.

☐ Discoverer Analytics, page 2-7 (Optional)

Includes Discoverer end user layer based partly on collected data and partly on the transactional HRMS tables. The collected data is held in database structures that are similar to data warehouse structures. These structures are the basis of powerful analytical Discoverer workbooks that you can use to analyze changes in your workforce over time and across organizational structures.

☐ Key Performance Indicators, page 2-10 (Optional)

Includes key performance indicators (KPIs), based on Oracle Performance Management Framework. The KPIs enable you to set targets with a tolerance range. Includes supporting Performance Management Viewer (PMV) reports.

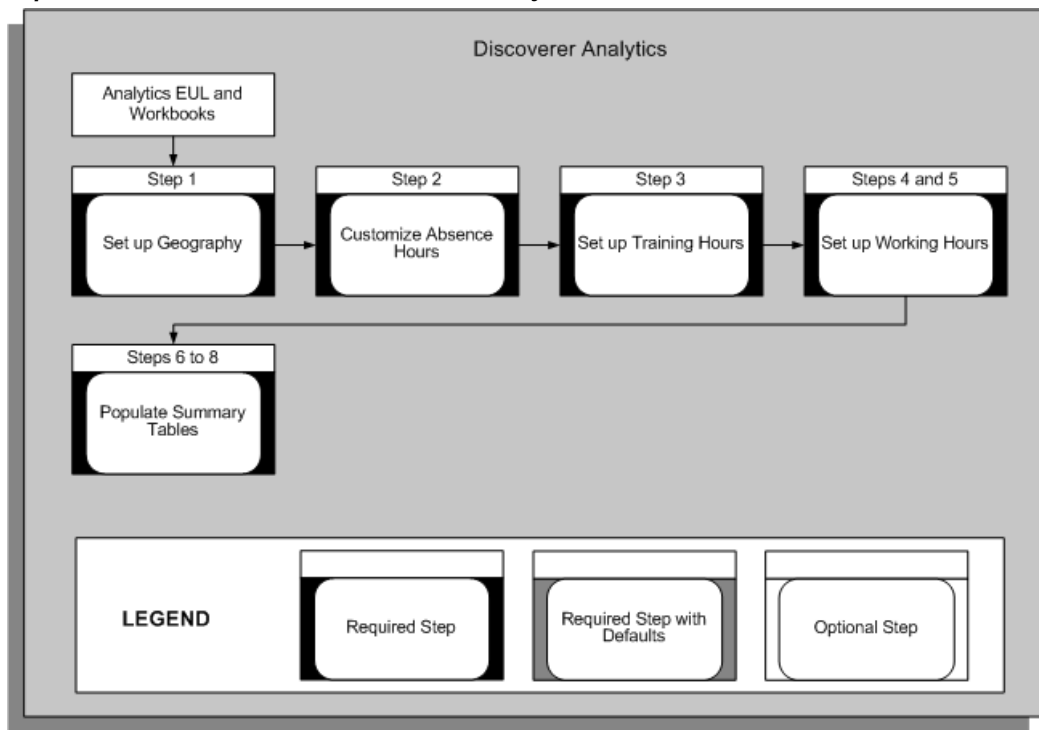
☐ Data Warehouse Module, page 2-10 (Optional)

Includes Discoverer workbooks and end user layer based on data warehouse structures, using Oracle Embedded Data Warehouse technology.

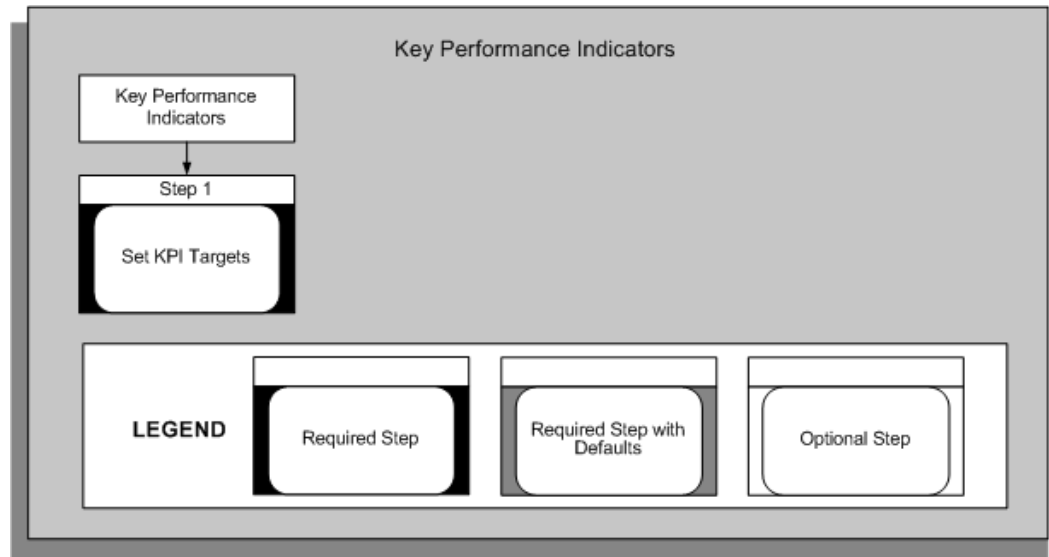
Implementation Flowcharts (HRMSi)

Some of the steps outlined in this section are Required, and some are Optional. Required with Defaults means that the setup functionality comes with predefined, default values in the database; however, you should review those defaults and decide whether to change them to suit your business needs. If you want or need to change them, you should perform that setup step. You need to perform Optional steps only if you plan to use the related feature or complete certain business functions.

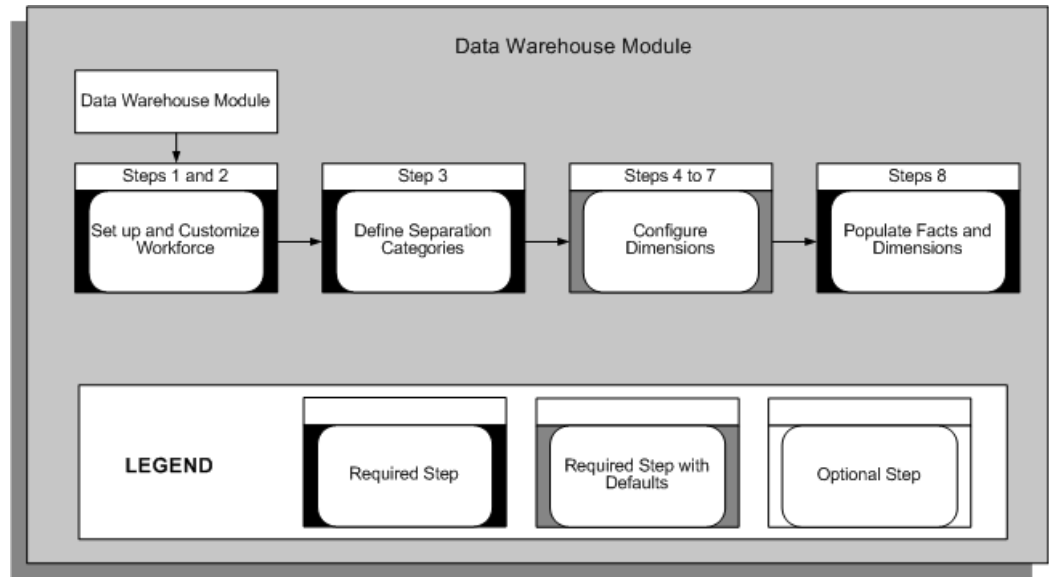
Implementation Flowchart for Discoverer Analytics



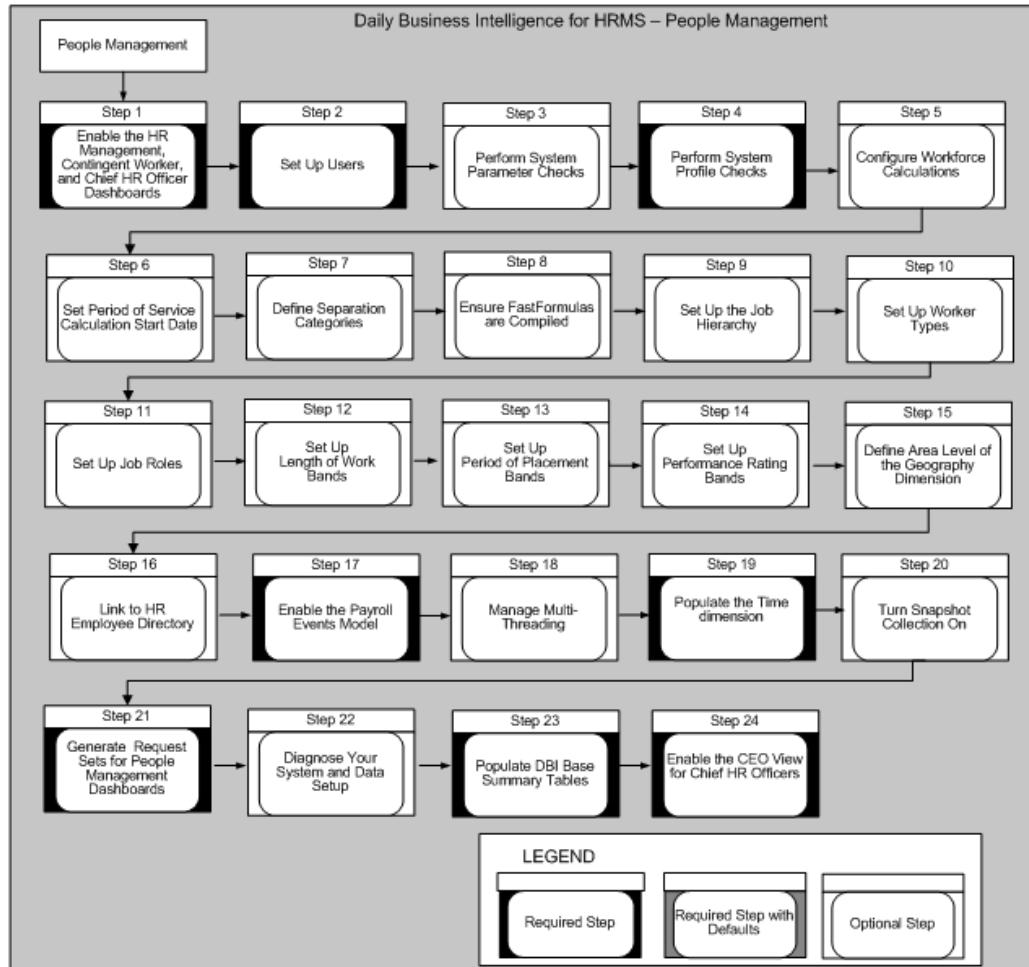
Implementation Flowchart for Key Performance Indicators



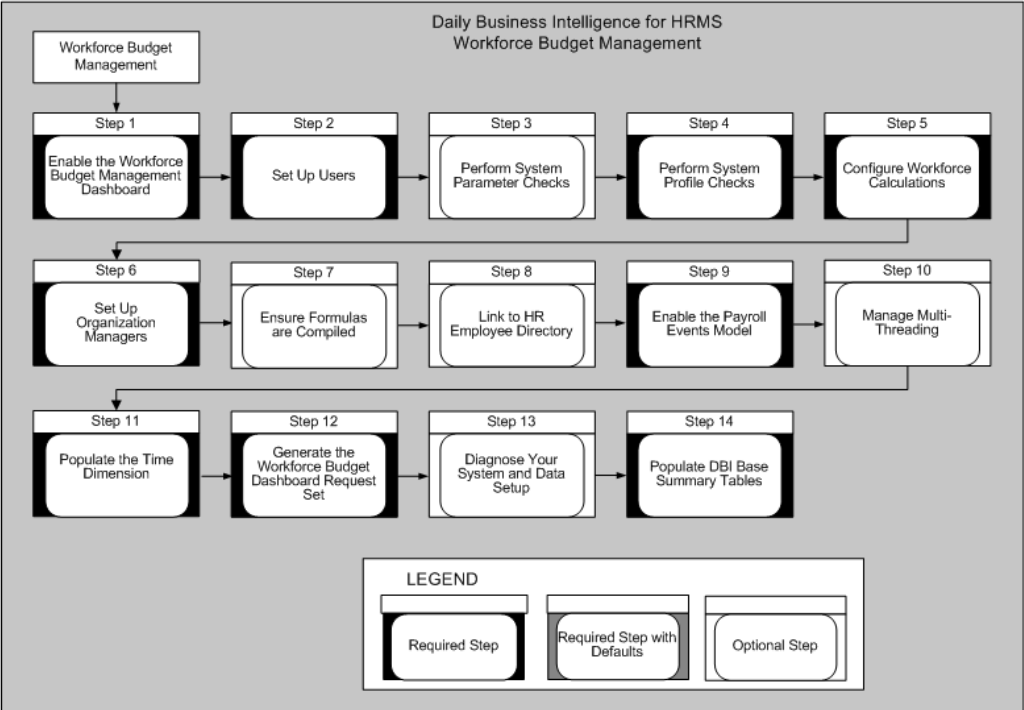
Implementation Flowchart for Data Warehouse Module



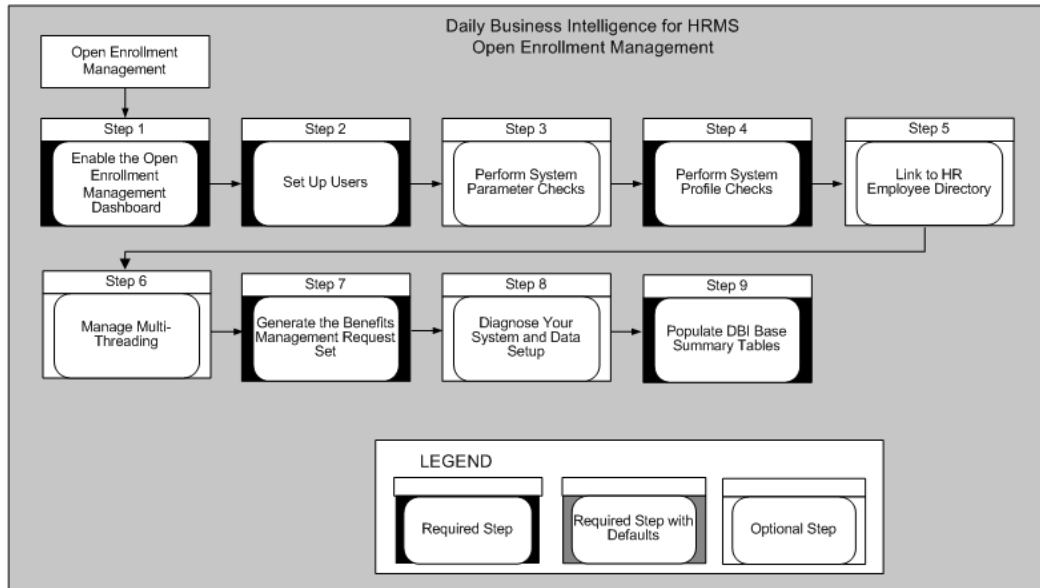
Implementation Flowchart for Daily Business Intelligence for HRMS - People Management



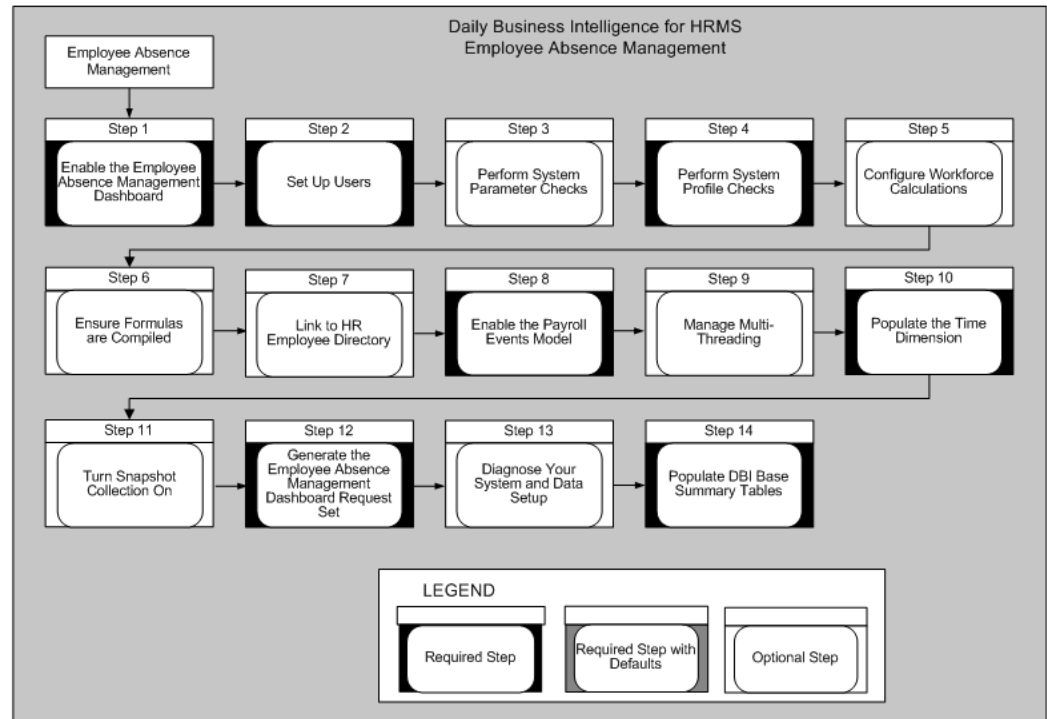
Implementation Flowchart for Daily Business Intelligence for HRMS - Workforce Budget Management



Implementation Flowchart for Daily Business Intelligence for HRMS - Open Enrollment Management



Implementation Flowchart for Daily Business Intelligence for HRMS - Employee Absence Management



Implement Discoverer Workbooks

HRMSi provides two styles of Discoverer end user layers (EULs) and predefined workbooks:

- Analytics
- Standard

The Analytics EUL and workbooks provide high level analysis of your workforce, and are mainly based on collected information. This is in contrast to the standard EUL and workbooks, which provide real time information, gathered directly from the HRMS transactional tables.

If you have not already implemented Workforce Intelligence reports for HRMS, you need to perform the steps to implement the HRMS Workforce Intelligence business areas and workbooks in order to use either the Analytics or the standard EULs and workbooks. See: *Workforce Intelligence, Oracle HRMS Implementation Guide*

You should then perform the Analytics implementation steps, below, to use the pre-defined Discoverer Analytics EUL and workbooks.

Analytics EUL and Workbooks

You have to perform these implementation steps to view data in the HRMSi Analytics Discoverer end user layer (EUL) business areas and workbooks. You need to perform some of these steps periodically, so that the Discoverer EUL and workbooks reflect changes in your enterprise data.

Step 1: Set Up Geography *Required Step*

If you wish to make use of the Analytics Discoverer EUL and workbooks, you need to set up the Geography dimension.

See: Setting Up Geography, page 3-7

Step 2: Configure Absence Hours *Required Step*

The Absence Hours report, and the Employee Absence Hours Trend Analytics workbook, report on the number of absence hours for each employee. If you do not record the time in hours, the reports use a predefined formula, `TEMPLATE_BIS_DAYS_TO_HOURS`, to convert the time into hours.

If you have not set up standard working conditions for your employees or business group, or the standard working conditions do not provide the number of hours in a day, the predefined template makes the following assumptions:

- Eight hours are worked per day.
- Five days are worked per week.
- Twenty one days are worked per month.

By copying the template, you can amend the working hours rules to those of your enterprise. You can also write a new working hours formula.

If you do copy or replace the predefined template you must name the new template `BIS_DAYS_TO_HOURS`.

See: Writing or Editing a Formula, *FastFormula User Guide*

Step 3: Set Up Training Hours *Required Step*

See: Setting Up and Configuring Training Hours, page 3-11

Set Up Working Hours *Required Steps*

Step 4: Set Up Working Hours *Required Step*

To report on the number of regular and overtime hours worked by people in your workforce, you need to use Oracle FastFormula to provide information about how you record regular and overtime hours.

See: Setting Up and Configuring Working Hours, page 3-14

Step 5: Adapt Hours Worked Workbook *Required Step*

You need to create calculations in the HRMSi - Employee Hours Worked (Organization Hierarchy) Trend Analytics Workbook so it can report on your overtime bands.

See: Adapting the Hours Worked Workbook, page 3-18

Populate Summary Tables *Required Steps*

To ensure the Analytics Discoverer End User Layer and workbooks run correctly and efficiently, you need to run concurrent programs to populate summary tables.

For a full discussion of these concurrent programs, and when you need to run them, see: Processes to Populate HRMSi Reports, page 3-2

Step 6: Populate the Competence Level Summary Table *Required Step*

You need to populate the Competence Level Summary table with your competence level hierarchy data used by your reports.

Run the concurrent program HRI Load All Competence Level Hierarchy to populate the summary table.

Use the Submit Requests window.

See: Populating the Competence Level Summary Table, page 3-18

Step 7: Populate the Competence Requirement Fact Table *Required Step*

You need to populate the Competence Requirement Fact table with the job competence requirements used by your reports.

Run the concurrent program HRI Load All Competence Requirement Fact to populate the summary table.

Use the Submit Requests window.

See: Populating the Competence Requirement Fact Table, page 3-19

Step 8: Populate the Time Dimension Folders *Required Step*

Analytics workbooks use time elements such as Year, Month, and Week. These workbooks will not return any data unless you populate the Discoverer EUL time dimension folders with time elements by using the Update Gregorian Hierarchy in the Time Dimension concurrent program.

Run the concurrent program Update Gregorian Hierarchy in the Time Dimension to populate the folders.

Use the Submit Requests window.

See: Populating the Time Dimension Folders, page 3-20

Implement Key Performance Indicators

HRMSi provides a performance management framework that uses Key Performance Indicators (KPIs) to enable 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.

See: Key Performance Indicators Key Concepts, page 1-7

If you have not already implemented Workforce Intelligence reports for HRMS, you need to perform the steps to implement the HRMS Workforce Intelligence business areas and workbooks in order to use HRMSi KPIs. See: *Workforce Intelligence, Oracle HRMS Implementation Guide*

Step 1: Set KPI targets *Required Step*

You need to set the KPI targets. The performance management framework sends a notification when actual performance falls short of, or exceeds, the 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*

Implement the Data Warehouse Module

This section contains the steps you need to perform in order to set up and configure the HRMSi Data Warehouse Module.

Set Up and Configure Workforce *Required Steps*

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget measurement type. Calculations depend *either* on your budget measurement values for assignments, or they use a formula..

Step 1: Set budget measurement values *Optional Step*

Set budget measurement values for each employee assignment within Oracle Human Resources. Reports and performance measures then calculate workforce using the budget values.

If you do not set a budget measurement value for an assignment, and a Business Group default does not exist, the reports and performance measures either calculate workforce using a formula, or they will not include the workforce for an assignment.

Use the Assignment Budget Values window.

See: *Entering Assignment Budget Values, Oracle HRMS Enterprise and Workforce Management Guide*

Step 2: Setup the WorkforceFormula Templates *Optional Step*

If you want to configure how workforce is counted do not set a budget measurement type and assignment measurement value for an assignment. The reports will then use a formula to calculate workforce.

HRMSi provides two predefined workforce formulas:

- TEMPLATE_HEAD
- TEMPLATE_FTE

Use the Formula window.

See: Configuring Workforce Calculations using Oracle FastFormula, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Define Separation Categories *Required Steps*

You need to define separation reasons as voluntary or involuntary, so that the reports can count the number of employees leaving voluntarily or involuntarily.

Step 3: Define Separation Categories *Required Step*

You attribute your separation reasons to separation categories by copying and amending the HR_MOVE_TYPE_TEMPLATE formula. The concurrent program HRI Load Separation Reasons Table runs the formula. This process stores the results in a table to be used when you run a report.

See: Defining Separation Categories, page 3-49

Configure Dimensions *Optional Steps*

To implement the Data Warehouse module of HRMSi, you must configure the following dimensions:

Dimensions

- Age Band
- Period of Work
- Job (Job Category Sets)
- Person Type

Oracle advises you to perform configuration only once, prior to loading data into the warehouse. Attempts to reconfigure after you have run your initial concurrent programs may lead to errors in the data contained within the dimension.

Configuration is optional. However, you should be aware of the implications of not configuring dimensions. For information on standard configuration and the implications of not configuring dimensions, see: Standard Data Warehouse

Step 4: Configure the Age Band Dimension *Optional Step*

The Age Band dimension uses the following predefined values held within a table:

- 0 - 18 Years
- 18 Years - 26 Years
- 26 Years - 36 Years
- 36 Years - 46 Years
- 46 Years - 56 Years
- 56 Years - 66 Years
- 66 Years –

Each age band includes the lower limit, but excludes the upper limit, For example, someone aged exactly 18 is only included in the 18 Years - 26 Years band.

You can add and remove age bands using API calls. See: Configuring Age Bands, page 3-29

Step 5: Configure the Period of Work Dimension *Optional Step*

The Period of Work dimension uses the following predefined values held within a table:

- 0 - 3 months
- 3 - 6 months
- 6 - 9 months
- 9 months - 1 year
- 1 - 2 years
- 2 - 3 years
- 3 - 4 years
- 4 - 5 years
- 5 - 10 years
- 10 - 15 years
- 15 - 20 years

- 20 - 25 years
- 25 - 35 years
- 35 - 45 years
- 45 - 55 years
- 55 years -

Each period of work band includes the lower limit, but excludes the upper limit, For example, someone who has worked for exactly 1 year is included only in the 1 - 2 years band.

You can add and remove period of work bands using API calls. See: Configuring Period of Work Bands, page 3-30

Step 6: Configure the Job Dimension (Job Category Sets) *Optional Step*

When a job is defined, you can associate it with specific categories.

Job category sets are groups of job categories; they enable you to report on a job category set as opposed to individual job categories. For further information on job category sets, see: Job Category Sets, page 3-28

The Job dimension contains one predefined job category set. You can add or delete your own job category sets to the dimension.

See: Configuring Job Category Sets, page 3-31

Step 7: Configure the Person Type Dimension *Optional Step*

The Person Type dimension models the hierarchy based on the system and user person types on the Oracle HR transactional tables.

If you want to identify the person types on the warehouse, you need to map different categories of person type on the Oracle HR Transactional System to the desired person type on the warehouse.

See: Configuring Person Types, page 3-33

Populate Facts and Dimensions *Required Steps*

Step 8: Populate Facts and Dimensions *Required Step*

To populate the Facts and Dimensions you need to run collection and load programs.

See: Populating Facts and Dimensions, page 3-35

Define Data Warehouse Security *Required Steps*

The Embedded Data Warehouse (EDW) uses a different security model to the rest of Oracle Applications. Any security set up against a user or responsibility for

transactional data will not reflect in the restrictions applied to the data warehouse.

Step 9: Define Data Warehouse Security *Required Step*

Use the Global Warehouse Administrator responsibility to define the dimension level values that a responsibility has access to. Against the dimension values you can give a valid list of values, for example, New York, Los Angeles. EDW does not apply any other security associated with a responsibility.

See: Configure Warehouse Security in the *Oracle Embedded Data Warehouse Implementation Guide* for more information about EDW Security and EDW Security setup.

Implement People Management Dashboards

You need to perform the following implementation steps to use Daily Business Intelligence for Human Resources.

Step 1: Enable the People Management Dashboards *Required Step*

Enable the following dashboards:

- Chief HR Officer - Overview
- Chief HR Officer - Headcount
- Chief HR Officer - Turnover
- HR Management - Overview
- HR Management - Headcount
- HR Management - Turnover
- Contingent Worker Management

See: Set Up Daily Business Intelligence in *Oracle Daily Business Intelligence Implementation Guide*

Step 2: Set Up Users *Required Step*

Use the Users window to assign the Daily Business Intelligence for HRMS responsibility to each user who requires access to the page. You must assign the user to a person to enable them to view dashboards and pages. In the Person field, select the person that you want to associate with the user.

See: Users Window, *Oracle Applications System Administrator's Guide*

Step 3: Perform System Parameter Checks *Optional Step*

The following initialization parameter has a significant impact on the performance of

DBI:

Parameter	Description	Default Setting	Recommended Setting for DBI	Impact on DBI
DB_BLOCK_CHECKING	Used to help prevent database block corruption	FALSE (off)	None	If you change the setting to TRUE, large objects (tables and materialized views) load more slowly.

For more information on the initialization parameter DB_BLOCK_CHECKING, see the Oracle Database *Reference* manual, available on the Oracle Database Documentation Library.

Step 4: Perform System Profile Checks *Required Step*

Check that the system profiles relevant to DBI for HRMS are correctly set up to meet your enterprise requirements.

Use the System Profile Values window.

See: Checking System Profiles, page 3-44

Step 5: Configure Workforce Calculations *Optional Step*

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget measurement type.

If you have set a budget measurement value for an assignment, reports and performance measures calculate workforce using budget values. Otherwise DBI for HRMS reports calculate workforce using the default TEMPLATE_HEAD formula.

To configure workforce calculations, do one of the following:

- Set Budget Measurement Values

See: Entering Assignment Budget Values, *Oracle HRMS Enterprise and Workforce Management Guide*, or

- Replace the default TEMPLATE_HEAD workforce formula with your amended version.

See: Configuring Workforce Calculations Using Oracle FastFormula, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 6: Set Period of Service Calculation Start Date *Optional Step*

To calculate the employee's period of service, you can use the hire date of the employee or the adjusted service date that combines the employee's period of service totals. The adjusted service date feature is useful for employees who have not worked continuously in a single business group.

Use the HRI:Period of Service/Placement Date Start Source profile option to identify the date the start date for calculating the period of service.

See: Checking System Profiles, page 3-47

For information on entering adjusted service date, see: *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide (Global)*

Step 7: Define Separation Categories *Optional Step*

DBI for HRMS provides a predefined formula, HR_MOVE_TYPE, that defines separation reasons as voluntary or involuntary. This definition enables DBI to report on the number of employees leaving your enterprise voluntarily or involuntarily.

The formula defines the leaving reasons Gross Misconduct and Deceased as Involuntary. It defines all other reasons as Voluntary.

Amend the HR_MOVE_TYPE formula if you want to change the way the formula attributes your separation reasons to the voluntary or involuntary separation categories.

See: Defining Separation Categories, page 3-49

Step 8: Ensure Formulas are Compiled *Optional Step*

You need to verify that the following formulas (or their replacements if you have configured any of them) are compiled:

- TEMPLATE_HEAD
- TEMPLATE_FTE
- HR_MOVE_TYPE_TEMPLATE
- HRI_MAP_WORKER_TYPE
- HRI_MAP_JOB_JOB_ROLE

Use the Formula window.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Step 9: Set Up the Job Hierarchy *Optional Step*

You can use links in the Salary report to drill down to reports that analyze salaries with job functions and families. For the drill reports to fully function, you need to set up Job Functions and Job Families.

Note: If you do not set up the Job Hierarchy, the drill reports will function, but they will group all jobs within an Unassigned Job Function and Family.

See: Setting Up the Job Hierarchy, page 3-52

Step 10: Set Up Worker Types *Optional Step*

Create the formula HRI_MAP_WORKER_TYPE to exclude certain groups of people from DBI reports.

See: Categorizing Workers, page 3-65

Step 11: Set Up Job Roles *Optional Step*

Create the formula HRI_MAP_JOB_JOB_ROLE to categorize people into the appropriate job roles. This feature enables the chief HR officer to compare HR workers with non-HR workers.

Modify the HRI_MAP_JOB_JOB_ROLE formula to change the way the formula attributes the job roles in your enterprise.

See: Setting Up Job Roles, page 3-56

Step 12: Set up Length of Work Bands *Optional Step*

To report on the employee length of service, DBI for HRMS uses the information provided by the Length of Work Banding bucket. This bucket divides the years of service into the following bands:

Name	Range Low Value	Range High Value
< 1 Year	0	12
1 - 3 Years	12	36
3 - 5 Years	36	60
5 - 10 Years	60	120
> 10 Years	120	(no value)

You can change these defaults by updating the band names and the distribution of values.

See: Setting Up Length of Work Bands, page 3-58

Step 13: Set Up Period of Placement Bands *Optional Step*

To report on the contingent worker period of placement, DBI for HRMS uses the information in the Period of Placement bucket. This bucket divides the months of service into the following bands:

Name	Range Low Value	Range High Value
< 3 months	0	3
3 - 6 months	3	6
6 - 12 months	6	12
12 - 24 months	12	24
> 24 months	24	(no value)

You can change these defaults by updating the band names and the distribution of values.

See: Setting Up Period of Placement Bands, page 3-59

Step 14: Set up Performance Rating Bands *Optional Step*

To report on employee performance, DBI for HRMS uses the information provided by the Performance Banding bucket. This bucket divides performance rating percentage values into the following bands:

Name	Range Low Value	Range High Value
Low	0	33
Mid	33	66
High	66	100

You can change these defaults by updating the band names and the distribution of values.

The rating percentage values are derived from a formula that maps your performance ratings to percentage values. You need to create the appropriate formula depending on whether your performance data is in Self-Service, or the Professional User Interface.

If your data is in Self-Service and you do not create the formula, DBI for HRMS uses a

default formula. If your data is in the Professional User Interface and you do not create the formula, DBI for HRMS displays the performance ratings as Unassigned.

See: Setting Up Performance Bands, page 3-59

Step 15: Define Area Level of the Geography Dimension *Optional Step*

To enable line managers and the chief HR officer to view report data across areas, you must set up the Area level geography dimension.

See: Setting Up Area Geography Dimension, page 3-64

Step 16: Link to HR Employee Directory *Optional Step*

Line managers and the chief HR officer can navigate directly to specific worker records in the Self-Service HR Employee Directory from the links in the DBI reports. By default this feature is turned off.

To enable managers and the chief HR officer to view worker records, you must:

- Enable the HRI: DBI Link To Transaction System profile option.

See: Checking System Profiles, page 3-44

- Ensure that the Self-Service HR Employee Directory functionality is set up correctly.

See: Employee Directory, *Oracle HRMS Deploy Self Service Capability Guide*

Step 17: Enable the Payroll Events Model *Required Step*

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) enables you to limit the incremental data refreshes to only records that have changed in Oracle Human Resources since the last refresh.

Note: If you never incrementally refresh your data, but only perform full refreshes, you do not need to enable the Payroll Events Model.

See: Enabling the Payroll Events Model, page 3-67

Step 18: Manage Multi-threading *Optional Step*

If your system uses multi-processor machines, there are two profile options you can use to manage multi-threading. These profile options replace the use of PYUGEN.

See: Managing Multi-Threading, page 3-48

Step 19: Populate the Time Dimension *Required Step*

If you have not already populated the Time dimension as part of implementing another intelligence product's request set, you must now populate it with time periods to support the trend reports within DBI for HRMS.

See: Populating the Time Dimension, page 3-71

Step 20: Turn Snapshot Collection On *Optional Step*

Snapshot collection provides faster dashboard rendering for managers of large numbers of employees. If you turn this feature on, the collection process collects an additional summary layer for those managers who have more staff than a specified number reporting to them.

Use two profile options to manage this feature:

- HRI: Collect Manager Snapshots
- HRI: Manager Snapshot Threshold

See: Checking System Profiles, page 3-46

Step 21: Generate Request Sets for the People Management Dashboards *Required Step*

DBI reports are based on data held in base summary tables and materialized views. You populate these structures using programs that are organized into request sets. You need to generate the request sets required by the following pages:

- HR Management - Headcount (HRI_DBI_LINE_MGR_WMV)
- HR Management - Overview (HRI_DBI_OA_LINE_MGR)
- HR Management - Turnover (HRI_DBI_LINE_MGR_TRN)
- Chief HR Officer - Headcount (HRI_DBI_CHO_HDC)
- Chief HR Officer - Overview (HRI_DBI_CHO_OVR)
- Chief HR Officer - Turnover (HRI_DBI_CHO_TRN)
- Contingent Worker Management (HRI_DBI_LINE_MGR_WMV_C)

For information on how to generate request sets, see: *Oracle Daily Business Intelligence Implementation Guide*

Step 22: Diagnose Your System and Data Setup *Optional Step*

You can run diagnostics reports to ensure both your HRMS system, and your data, are set up correctly for DBI for HRMS reporting.

See: Running the Diagnostics Setup Reports, page 3-70

Step 23: Populate DBI Base Summary Tables *Required Step*

You need to run the HR Management initial load request set in order to populate the underlying tables. After successfully running the initial load request set you can incrementally collect data by running the HR Management incremental refresh request

set.

Use the Submit Requests window.

See: Populating DBI Summary Data Structures, page 3-72

Step 24: Enable CEO View for Chief HR Officers *Required Step*

When you log into DBI for HRMS, your view of workers is restricted by your position in the manager hierarchy. To effectively manage HR using the Chief HR Officer dashboards, a chief HR officer needs to see data for all people within the enterprise.

Use the HRI:DBI Chief HR Officer Named User profile option to enable Chief HR Officers to view the Chief HR Officer dashboards as if they are logged in as the CEO.

Important: You must have successfully run an Initial Load before you set this profile option. This profile option only affects the Chief HR Officer responsibility.

See: Checking System Profiles, page 3-46

Implement Workforce Budget Management Dashboard

You need to perform the following implementation steps to use the Workforce Budget Management Dashboard.

Important: Implementing HRMS Budgeting is a prerequisite to implementing Workforce Budget Management. You must create money and headcount budgets for each organization on the organization manager hierarchy. Calculations of actual expenditures consider all departments, whether or not they have a budget. Organizations without a budget skew the data, resulting in meaningless comparisons of budgeted and actual amounts.

Step 1: Enable the Workforce Budget Management Dashboard *Required Step*

Enable the Workforce Budget Management Dashboard.

See: Set Up Daily Business Intelligence in *Oracle Daily Business Intelligence Implementation Guide*

Step 2: Set Up Users *Required Step*

Use the Users window to assign the Workforce Budget Manager responsibility to each user who requires access to the page.

See: Users Window, *Oracle Applications System Administrator's Guide*

Step 3: Perform System Parameter Checks *Required Step*

The following initialization parameter has a significant impact on the performance of DBI:

Parameter	Description	Default Setting	Recommended Setting for DBI	Impact on DBI
DB_BLOCK_CHECKING	Used to help prevent database block corruption	FALSE (off)	None	If you change the setting to TRUE, large objects (tables and materialized views) load more slowly.

For more information on the initialization parameter DB_BLOCK_CHECKING, see the Oracle Database *Reference* manual, available on the Oracle Database Documentation Library.

Step 4: Perform System Profile Checks *Required Step*

Check that the system profiles relevant to DBI for HRMS are correctly set up to meet your enterprise requirements.

Use the System Profile Values window.

See: Checking System Profiles, page 3-44

Step 5: Configure Workforce Calculations *Required Step*

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget measurement type.

If you have set a budget measurement value for an assignment, reports and performance measures calculate workforce using budget values. Otherwise DBI for HRMS reports calculate workforce using the default TEMPLATE_HEAD formula.

To configure workforce calculations, do one of the following:

- Set Budget Measurement Values
See: Entering Assignment Budget Values, *Oracle HRMS Enterprise and Workforce Management Guide*, or
- Replace the default TEMPLATE_HEAD workforce formula with your amended version.
See: Configuring Workforce Calculations Using Oracle FastFormula, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 6: Set Up Organization Managers*Required Step*

The Workforce Budget Management Dashboard adds an additional filter to the standard Manager list that appears in a dashboard when you choose a subordinate manager. The budget dashboard Manager list displays only those subordinates who own organizations. You must set up this filter by defining a manager for each HR organization that has a budget.

Use the Organization Manager Relationship window.

See: Selecting and Viewing Managers for Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*

Step 7: Ensure Formulas are Compiled*Required Step*

You need to verify that the following formulas (or their replacements if you have configured any of them) are compiled:

- TEMPLATE_HEAD
- TEMPLATE_FTE
- HR_MOVE_TYPE_TEMPLATE

Use the Formula window.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Step 8: Link to HR Employee Directory*Optional Step*

Workforce budget managers can navigate directly to specific worker records in the Self-Service HR Employee Directory from the worker name links in the Workforce Occupancy Details report. By default this feature is turned off.

To enable workforce budget managers to view worker records, you must:

- Enable the HRI:DBI Link To Transaction System profile option.

See: Checking System Profiles, page 3-44

- Ensure that you have set up the Self-Service HR Employee Directory functionality correctly.

See: Employee Directory, *Oracle HRMS Deploy Self Service Capability Guide*

Step 9: Enable the Payroll Events Model*Required Step*

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) enables you to limit the incremental data refreshes to only records that have changed in Oracle Human Resources since the last refresh.

Note: If you never incrementally refresh your data, but only perform full refreshes, you do not need to enable the Payroll Events Model.

See: Enabling the Payroll Events Model, page 3-67

Step 10: Manage Multi-Threading *Optional Step*

If your system uses multi-processor machines, there are two profile options you can use to manage multi-threading. These profile options replace the use of PYUGEN.

See: Managing Multi-Threading, page 3-48

Step 11: Populate the Time Dimension *Required Step*

If you have not already populated the Time dimension as part of implementing another intelligence product's request set, you must populate it with time periods to support the trend reports within DBI for HRMS.

See: Populating the Time Dimension, page 3-71

Step 12: Generate the Workforce Budget Management Request Set *Required Step*

DBI reports are based on data held in base summary tables and materialized views. You populate these structures using predefined programs within request sets. You need to generate the request set that the Workforce Budget Management Dashboard (HRI_DBI_WBM_PAGE) requires.

For information on how to generate the request set, see: *Oracle Daily Business Intelligence Implementation Guide*

Step 13: Diagnose Your System and Data Setup *Optional Step*

You can run diagnostics reports to ensure you have set up both your HRMS system and your data correctly for DBI for HRMS reporting.

See: Running the Diagnostics Setup Reports, page 3-70

Step 14: Populate DBI Base Summary Tables *Required Step*

You need to run the Workforce Budget Management initial load request set in order to populate the underlying tables. After successfully running the initial load request set you can refresh data by scheduling and running the full refresh request set.

Use the Submit Requests window.

See: Populating the DBI for HRMS Base Summary Tables, page 3-72

Implement Open Enrollment Management Dashboard

You need to perform the following implementation steps to use the Open Enrollment Management dashboard.

Step 1: Enable the Open Enrollment Management Dashboard*Required Step*

Enable the Open Enrollment Management Dashboard.

See: Set Up Daily Business Intelligence in *Oracle Daily Business Intelligence Implementation Guide*

Step 2: Set Up Users*Required Step*

Use the Users window to assign the Benefits Manager responsibility to each user who requires access to the page.

See: Users Window, *Oracle Applications System Administrator's Guide*

Step 3: Perform System Parameter Checks*Optional Step*

The following initialization parameter has a significant impact on the performance of DBI:

Parameter	Description	Default Setting	Recommended Setting for DBI	Impact on DBI
DB_BLOCK_CHECKING	Used to help prevent database block corruption	FALSE (off)	None	If you change the setting to TRUE, large objects (tables and materialized views) load more slowly.

For more information on the initialization parameter DB_BLOCK_CHECKING, see the Oracle Database *Reference* manual, available on the Oracle Database Documentation Library.

Step 4: Perform System Profile Checks*Required Step*

Check that the system profiles relevant to DBI for HRMS are correctly set up to meet your enterprise requirements.

Use the System Profile Values window.

See: Checking System Profiles, page 3-44

Step 5: Link to HR Employee Directory*Optional Step*

Benefits managers can navigate directly to specific worker records in the Self-Service HR Employee Directory from the worker name links in the reports. By default this feature is turned off.

To enable benefits managers to view worker records, you must:

- Enable the HRI:DBI Link To Transaction System profile option.
See: Checking System Profiles, page 3-44
- Ensure that you have set up the Self-Service HR Employee Directory functionality correctly.
See: Employee Directory, *Oracle HRMS Deploy Self Service Capability Guide*

Step 6: Manage Multi-threading *Optional Step*

If your system uses multi-processor machines, there are two profile options you can use to manage multi-threading. These profile options replace the use of PYUGEN.

See: Managing Multi-Threading, page 3-48

Step 7: Generate the Benefits Management Request Set *Required Step*

DBI reports are based on data held in base summary tables and materialized views. You populate these structures using predefined programs within request sets. You need to generate the request set that the Open Enrollment Management page - HRI_DBI_OES_STATUS requires.

For information on how to generate the request set, see: *Oracle Daily Business Intelligence Implementation Guide*

Step 8: Diagnose Your System and Data Setup *Optional Step*

You can run diagnostics reports to ensure you have set up both your HRMS system and your data correctly for DBI for HRMS reporting.

See: Running the Diagnostics Setup Reports, page 3-70

Step 9: Populate DBI Base Summary Tables *Required Step*

You need to run the HRI DBI Benefits Initial and Incremental Load request set in order to populate the underlying tables. After successfully running the initial load request set, you can refresh data by scheduling the process and setting the Full Refresh parameter to No.

Use the Submit Requests window.

See: Populating DBI Summary Data Structures, page 3-72

Implement Employee Absence Management Dashboard

Perform the following implementation steps to use the Employee Absence Management dashboard.

Step 1: Enable the Employee Absence Management Dashboard *Required Step*

Enable the Employee Absence Management Dashboard.

See: Set Up Daily Business Intelligence in *Oracle Daily Business Intelligence Implementation Guide*

Step 2: Set Up Users *Required Step*

Use the Users window to assign the HR Line Manager and Chief HR Officer responsibilities to the appropriate users.

See: Users Window, *Oracle Applications System Administrator's Guide*

Step 3: Perform System Parameter Checks *Optional Step*

The following initialization parameter has a significant impact on the performance of DBI:

Parameter	Description	Default Setting	Recommended Setting for DBI	Impact on DBI
DB_BLOCK_CHECKING	Used to help prevent database block corruption	FALSE (off)	None	If you change the setting to TRUE, large objects (tables and materialized views) load more slowly.

For more information on the initialization parameter DB_BLOCK_CHECKING, see the Oracle Database *Reference* manual, available on the Oracle Database Documentation Library.

Step 4: Perform System Profile Checks *Required Step*

Check that the system profiles relevant to DBI for HRMS are correctly set up to meet your enterprise requirements.

They include:

- HRI: Absence Duration Units
- HRI: Populate Absence Events Queue
- HRI: Workforce in Period Calculation Method

Use the System Profile Values window.

See: Checking System Profiles, page 3-44

Step 5: Configure Workforce Calculations *Required Step*

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget

measurement type.

If you have set a budget measurement value for an assignment, reports and performance measures calculate workforce using budget values. Otherwise DBI for HRMS reports calculate workforce using the default TEMPLATE_HEAD formula.

To configure workforce calculations, do one of the following:

- Set Budget Measurement Values
See: Entering Assignment Budget Values, *Oracle HRMS Enterprise and Workforce Management Guide*, or
- Replace the default TEMPLATE_HEAD workforce formula with your amended version.
See: Configuring Workforce Calculations Using Oracle FastFormula, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 6: Verify Formulas*Required Step*

Verify the following formulas (or their replacements if you have configured any of them):

- TEMPLATE_HEAD
- TEMPLATE_FTE
- HR_MOVE_TYPE_TEMPLATE
- TEMPLATE_ABSENCE_DURATION
- LEGISLATION_ABSENCE_DURATION
- BG_ABSENCE_DURATION

Use the Formula window.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Step 7: Link to HR Employee Directory*Optional Step*

Users can navigate directly to specific worker records in the Self-Service HR Employee Directory from the worker name links in the reports. By default this feature is turned off.

To enable users to view worker records, you must:

- Set the HRI:DBI Link To Transaction System profile option to HR Employee Directory.
See: Checking System Profiles, page 3-44

- Ensure that you have set up the Self-Service HR Employee Directory functionality correctly.

See: Employee Directory, *Oracle HRMS Deploy Self Service Capability Guide*

Step 8: Enable the Payroll Events Model *Required Step*

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) enables you to limit the incremental data refreshes to records that have changed in Oracle Human Resources since the last refresh.

Note: If you never incrementally refresh your data, but only perform full refreshes, you need not enable the Payroll Events Model.

See: Enabling the Payroll Events Model, page 3-67

Step 9: Manage Multi-threading *Optional Step*

If your application uses multi-processor machines, there are two profile options you can use to manage multi-threading. These profile options replace the use of PYUGEN.

See: Managing Multi-Threading, page 3-48

Step 10: Populate the Time Dimension *Required Step*

If you have not already populated the Time dimension as part of implementing another intelligence product's request set, you must now populate it with time periods to support the trend reports within DBI for HRMS.

See: Populating the Time Dimension, page 3-71

Step 11: Turn Snapshot Collection On *Optional Step*

Snapshot collection provides faster dashboard rendering for managers of large numbers of employees. If you turn this feature on, the collection process collects an additional summary layer for those managers who have more staff than a specified number reporting to them.

Use two profile options to manage this feature:

- HRI: Collect Manager Snapshots
- HRI: Manager Snapshot Threshold

See: Checking System Profiles, page 3-46

Step 12: Generate Request Sets for the Employee Absence Management Dashboard *Required Step*

DBI reports depend on data in the base summary tables and materialized views. You populate these structures using programs in predefined request sets. Generate the request sets that the Employee Absence Management requires

(HRI_DBI_LINE_MGR_ABS).

For information on how to generate request sets, see: *Oracle Daily Business Intelligence Implementation Guide*

Step 13: Diagnose Your System and Data Setup *Optional Step*

You can run diagnostics reports to ensure you have set up both your HRMS application and your data correctly for DBI for HRMS reporting.

See: Running the Diagnostics Setup Reports, page 3-70

Step 14: Populate DBI Base Summary Tables *Required Step*

Run the Employee Absence Management initial load request set to load the underlying tables. After successfully running the initial load request set, you can incrementally collect data by running the Employee Absence Management incremental refresh request set.

Use the Submit Request window.

See: Populating DBI Summary Data Structures, page 3-72

Technical Essays

Data Warehouse Module Technical Essays

Example Configuration Script

The following script configures all of the dimensions as an example. For later reference, Oracle recommends that you save all the API calls you wish to make as a SQL file, and then run this file from a SQL*Plus session on the APPS schema.


```

WHENEVER OSERROR EXIT FAILURE ROLLBACK;
WHENEVER SQLERROR EXIT FAILURE ROLLBACK;
REM
REM Description:
REM This script configures the HRI dimensions
REM Age Band
REM Service Band
REM Job
REM Person Type
REM It also enables all separation reasons to be re-categorized
REM
=====
REM
BEGIN
/*****/
/* Age Band Dimension */
/*****/
/* Split age band 0 - 18 years */
/* into 0 - 16 years and 16 - 18 years */
hri_edw_dim_age_band.insert_age_band
(16,0);
/*****/
/* Service Band Dimension */
/*****/
/* Remove the service bands 3 - 6 months, 6 - 9 months */
/* and 9 months - 1 year, and leave the first service band as 0 - 1 year
*/
hri_edw_dim_service.remove_service_band
(0,3,0,0);
hri_edw_dim_service.remove_service_band
(0,6,0,0);
hri_edw_dim_service.remove_service_band
(0,9,0,0);
/*****/
/* Job Dimension */
/*****/
/* Add another job category set for General Administration (GA) */
/* A lookup code of NOT_ADM should be added through forms */
/* with a meaning of "Not General Administration" */
hri_edw_dim_job.add_job_category
(2,null,'NOT_ADM');
hri_edw_dim_job.add_job_category
(2,'GA',null);
/*****/
/* Person Type Mappings */
/*****/
/* Map an employee with a user person type of "Consultancy" to
Consultant */
hri_edw_dim_person_type.insert_user_row
('EMP', 'Consultancy', 'CONSULTANT');
/*****/
/* Workforce Separation Fact */
/*****/
/* Enable all separation reason categorizations to be overwritten */
hri_edw_fct_wrkfc_sprtn_set_update_flag
(null,'Y');
END;
/
Commit;

```

Deploy Strategic Reporting

Deploy Strategic Reporting

Programs to Populate HRMSi Strategic Reports

The HRMSi strategic reports rely on collected data, stored in summary tables, in order to run efficiently. You need to collect data from your transaction tables regularly so that the information in your reports is up to date. You collect the data by running the following pre-defined concurrent programs:

- HRI Load All Competence Level Hierarchy, page 3-2
- HRI Load All Competence Requirement Fact, page 3-3
- Update Gregorian Hierarchy in the Time Dimension, page 3-4
- HRI Load All Geography Category Structures, page 3-4
- HRI Load Separation Reasons Table, page 3-5

For information on concurrent programs, see: Overview of Concurrent Processing, *Oracle Applications Developer's Guide*

HRI Load All Competence Level Hierarchy

All Analytics business areas and workbooks that use the competence level hierarchy gather information from the Competence Level Summary table. Use the HRI Load All Competence Level Hierarchy concurrent program to populate this summary table with your competence level hierarchy data.

The program collects pre-calculated data and stores it in the Competence Level Summary (HRI_CS_CMPTNC_LVL_CT) table ready for use by the workbooks.

Parameters

The HRI Load All Competence Level Hierarchy concurrent program uses the following parameters:

- **Collect From Date**

The earliest date required for competence level hierarchy information. The default is five years previous the first time you run this program, thereafter the value defaults to the previous Collect To Date.

- **Collect To Date**

The latest date required for competence level hierarchy information. The default is the current date.

- **Full Refresh**

If you set Full Refresh to Yes, the concurrent program deletes all information previously held in the summary table, and recalculates the competence level hierarchy for the entire collection date range specified (see the Collect From Date and Collect To Date parameters).

If you set Full Refresh to No, the concurrent program deletes none of the existing table information. The concurrent program incrementally updates the summary table with any competence level hierarchy changes that occurred within the collection date range specified (see the Collect From Date and Collect To Date parameters).

Run Frequency

Run this concurrent program infrequently in full refresh mode, and frequently in incremental mode (Full Refresh = No) to capture and report on competence level hierarchy changes in your enterprise.

If a system failure occurs, you must restart the process.

HRI Load All Competence Requirement Fact

All Analytics business areas and workbooks that use the job competence requirements gather information from the Competence Requirement Fact Summary table. Use the HRI Load All Competence Requirement Fact concurrent program to populate this summary table with your job competence requirement data.

The program collects pre-calculated data and stores it in the Competence Requirement Fact Summary (HRI_MB_CMPTNC_RQRMNT_CT) table ready for use by the workbooks.

Parameters

The HRI Load All Competence Requirement Fact concurrent program uses the following parameters:

- **Collect From Date**

The earliest date required for competence requirement information. The default is five years previous the first time you run this program, thereafter the value defaults to the previous Collect To Date.

- **Collect To Date**

The latest date required for competence requirement information. The default is the current date.

- **Full Refresh**

If you set Full Refresh to Yes, the concurrent program deletes all information

previously held in the summary table, and collects competence fact information for the entire collection date range specified (see the Collect From Date and Collect To Date parameters).

If you set Full Refresh to No, the concurrent program deletes none of the existing table information. The concurrent program incrementally updates the summary table with any competence fact changes that occurred within the collection date range specified (see the Collect From Date and Collect To Date parameters).

Run Frequency

Run this concurrent program infrequently in full refresh mode, and frequently in incremental mode (Full Refresh = No) to capture and report on competence level hierarchy changes in your enterprise.

If a system failure occurs, you must restart the process.

Update Gregorian Hierarchy in the Time Dimension

This program populates the time dimension folders in the Developer HRMSi – Administration – Analytic Dimensions business area with time information. So, for example, it populates the Time Year – (Dimension Level) folder with a list of years, and the Time Month – (Dimension Level) folder with a list of months.

Parameters

Update Gregorian Hierarchy in the Time Dimension concurrent program has the following parameters:

- **Date From**

Set this to the earliest date you need to see in your reports.

- **Date To**

Set this to the latest date you need to see in your reports.

Do not use an unnecessarily wide date range, as this will impede performance.

Run Frequency

Run this program when you need to collect future dates.

HRI Load All Geography Category Structures

Run the HRI Load All Geography Category Structures concurrent program in order to populate the geography dimension with values. This concurrent program populates the location information stored in the HR_LOCATIONS_ALL table into a separate summary table.

Parameters

The HRI Load All Geography Category Structures concurrent program has the following parameters:

- **Collect From Date**

The earliest date required for geography information. The default is one month previous the first time you run this program, thereafter the value defaults to the previous Collect To Date.

- **Collect To Date**

The latest date required for geography information. The default is the current date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the dimension again for the entire collection date range specified (see the Collect From Date and Collect To Date parameters).

If you set Full Refresh to No, the program collects data in the incremental mode and that means it inserts new records without purging the table.

Run Frequency

Oracle recommends that you run the HRI Load All Geography Category Structures concurrent program infrequently in full refresh mode, and frequently in incremental mode to reflect changes in the geography hierarchy in your enterprise.

If a system failure occurs, you must restart the process.

HRI Load Separation Reasons Table

This concurrent program collects formula definitions for voluntary and involuntary separation reasons into a table to improve reporting performance.

Parameters

This concurrent program has no parameters.

Run Frequency

At implementation you need to run the HRI Load Separation Reasons Table concurrent program in order to initially populate the Separation Reasons table.

Thereafter, Oracle recommends that you run the HRI Load Separation Reasons Table concurrent program only after changes to the HR_MOVE_TYPE formula.

Note: If you have EDW implemented then it is recommended that you

never schedule the HRI Load Separation Reasons Table process to run regularly. It should only be run on an ad-hoc basis when the full implications on the Workforce Separation fact re-collection are understood and accepted.

Deploy Discoverer Analytics

Deploy Discoverer Analytics Overview

Use the procedures in this topic in conjunction with the implementation steps to successfully set up the Discoverer Analytic workbooks.

Setting Up Geography

The geography dimension reflects a hierarchical location on Earth. A geography dimension may define an area as large as a world region or as small as a grid location on a building floor, or a stock location.

You need to define three levels of geography dimension:

- Area (parent of country)
 - Country (parent of region)
 - Region
1. You first need to define your areas, countries, and regions for the geography dimension.
See: Defining areas, countries, and regions, page 3-8
 2. Once you have defined your areas, countries, and regions, you need to assign the regions to countries, and the countries to areas.
See: Assigning areas, countries, and regions, page 3-8
 3. Create a Region segment on the Location Descriptive Flexfield.
See: Setting up a Region segment, page 3-9
 4. Enter a region in the Region segment.
See: Assigning a Region to a location, page 3-9
 5. Map the region flexfield segment to the geography dimension.
See: Mapping the Region flexfield segment to the geography dimension, page 3-10
 6. Finally, populate the geography dimension with values.
See: Populating the Geography Dimension, page 3-21

Defining Areas, Countries, and Regions

Areas are unique groups with countries assigned. You can define areas as you wish. Areas are not predefined—you must create the areas that you need.

Country is an existing dimension and is already defined in Oracle Applications.

Regions are subsets of countries. You can define as many regions as you wish within a country. Regions are not predefined—you must create the regions that you need.

Use the Application Object Library Lookups window.

To define areas:

1. Enter Query Mode and search for Area in the Type field.
2. Add desired areas (for example, North America, EMEA, or Asiapac)
3. Save your changes.

To define regions:

1. Enter Query Mode and search for Region in the Type field.
2. Add desired areas (for example, North, South, East, West, or My Region)
3. Save your changes.

Assigning Areas, Countries, and Regions

Once you have defined your areas and regions, you need to assign regions to countries, and countries to areas.

Use the Define Territory Hierarchies window.

To assign regions to countries:

1. In the Parent Territory Type field, select Country.
2. In the Code field, select a country that you have created.
3. In the Child Territory region, select the regions you want to associate with the selected country.
4. Repeat for other countries as necessary.
5. Save your changes.

To assign countries to areas:

1. In the Parent Territory Type field, select Area.
2. In the Code field, select an area that you have created.
3. In the Child Territory region, select the countries you want to associate with the selected area.
4. Repeat for other areas as necessary.
5. Save your changes.

Setting Up a Region Segment

Set up a Region segment on the Location descriptive flexfield.

Use the Descriptive Flexfield Segments window.

To set up a Region segment:

1. In the Title field, query for Additional Location Details.
2. Unfreeze the flexfield.
3. In the Context Field Values region, select Global Data Elements.
4. Click the Segments button.
5. Enter a new region segment name.
6. Select an available attribute.
7. In the Value Set field, enter BIS Region Value Set (predefined).
8. Freeze the flexfield.
9. Compile the flexfield.

Assigning a Region to a Location

Once you have defined regions and set up the region segment on the Location flexfield, you need to associate regions with locations.

Use the Location window.

To assign a region to a location:

1. In the Name field, query for the desired location.
2. Click on the flexfield.
3. In the Region field of the Additional Location Details window, enter the name of a region you defined earlier.
4. Exit the flexfield.
5. Save your changes.
6. Repeat for other locations as necessary.

Mapping the Region Flexfield Segment to the Geography Dimension

You need to map your Region flexfield segment (see: Setting up a Region segment, page 3-9) to the Geography dimension.

Use the Flexfield Mappings window.

To map the region flexfield segment to the geography dimension:

1. In the Flexfield Name field, query Additional Location Details.
2. In the Dimension region, enter a dimension of Geography with a level of Region.
3. Save your changes
4. Click the Segment Mapping button.
5. In the Context Code field, enter Global Data Elements.
6. In the End User Column Name field, select the name of your region segment.
7. Close the Segment Mappings window.
8. Save your changes and close the Flexfield Mappings window.

What's Next

Once you have performed this procedure, you can populate the Geography dimension.
See: Populating the Geography Dimension, page 3-21

Setting Up and Configuring Training Hours

The number of training hours for your employees is displayed in the Training Success report and in the following workbooks:

- Student Training Success (External Students) Analysis Workbook
- Student Training Success (Internal Students) Analysis Workbook
- Training Cost and Revenue Analysis Workbook
- Employee Training Attendance Success (Organization Hierarchy) Status Analytics Workbook
- Employee Training Attendance Success (Organization Hierarchy) Trend Analytics Workbook

The number of training hours is also displayed in the following KPI reports:

- Training Attendance Status
- Training Attendance with Job Category Status

Within Oracle Learning Management you can record the duration of a training event using a time period of your choice. For example, rather than recording an event in hours you might record it in weeks or months.

To enable the reports to display the number of hours of an event, a predefined formula,, `TEMPLATE_BIS_TRAINING_CONVERT_DURATION`, converts your time periods into hours.

OTA is installed with four predefined time periods. If you record the duration of events using these predefined time periods the formula automatically converts them into the following hours:

- D (Day) = 8 Hours
- W (Week) = 40 Hours
- M (Month) = 169 Hours
- Y (Year) = 2028 Hours

Note: You set up time periods in Oracle Training Administration using the Lookup type `FREQUENCY`.

However, you should copy and amend the formula if:

- The number of hours per time period does not match those of your enterprise.
- You have set up different time periods using the Lookup type FREQUENCY.

Additional frequencies you have set up are not automatically converted to hours using the predefined formula.

1. Amending the Default Hours

To ensure that the report and workbooks calculate the correct hours for your training events you can configure the predefined formula.

See: Amending Default Training Hours, page 3-12

2. Adding Additional Training Time Periods

If you have defined your own training time periods using the FREQUENCY Lookup you must copy and amend the predefined formula. If you do not add your additional time periods to the formula the hours for these events will not be included in the report and workbooks.

See: Adding Additional Training Time Periods, page 3-13

Amending Default Training Hours

To ensure that the report and workbooks calculate the correct hours for your training events you can configure the predefined TEMPLATE_BIS_TRAINING_CONVERT_DURATION formula.

For example, if you record the duration of a training event in days, and within your training organization a day is 10 hours, use the Formula window to:

1. Copy the predefined template formula
TEMPLATE_BIS_TRAINING_CONVERT_DURATION.

You must name the new formula BIS_ TRAINING_CONVERT_DURATION, otherwise the report and workbooks cannot use it.

2. Replace the number of hours a training event runs in a day.

In the predefined formula the number of hours are set as follows:

```
hours_per_day = 8
```

Replace the number of hours with 10:

```
hours_per_day = 10
```

3. Compile the new formula.

For information on editing a formula, see: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Adding Additional Training Time Periods

If you have defined your own training time periods using the FREQUENCY Lookup you must copy and amend the predefined TEMPLATE_BIS_TRAINING_CONVERT_DURATION formula. If you do not add your additional time periods to the formula the hours for these events will not be included in the report and workbooks.

For example, if you set up a time period called Fortnight using the Lookup code of F (Fortnight), use the Formula window to amend the formula as follows:

1. Copy the predefined template formula
TEMPLATE_BIS_TRAINING_CONVERT_DURATION.

You must name the new formula BIS_TRAINING_CONVERT_DURATION, otherwise the report and workbooks cannot use it.

2. Add the additional text shown in bold to set up the formula so that it converts fortnight into hours:

```

/* Main Body of Formula */
hours_per_day = 8
hours_per_week = hours_per_day * 5
hours_per_fortnight = hours_per_week * 2
hours_per_month = hours_per_week * 4.225
hours_per_year = hours_per_month * 12

/* Calculate Duration in Hours */
IF (from_duration_units = 'Y') THEN
  hours = from_duration * hours_per_year
ELSE IF (from_duration_units = 'M') THEN
  hours = from_duration * hours_per_month
ELSE IF (from_duration_units = 'F') THEN
  hours = from_duration * hours_per_fortnight
ELSE IF (from_duration_units = 'W') THEN
  hours = from_duration * hours_per_week
ELSE IF (from_duration_units = 'D') THEN
  hours = from_duration * hours_per_day
ELSE IF (from_duration_units = 'H') THEN
  hours = from_duration
ELSE
  hours = 0
/* Calculate Duration in desired units */
IF (to_duration_units = 'H') THEN
  to_duration = hours
ELSE IF (to_duration_units = 'D') THEN
  to_duration = hours / hours_per_day
ELSE IF (to_duration_units = 'W') THEN
  to_duration = hours / hours_per_week
ELSE IF (to_duration_units = 'F') THEN
  to_duration = hours / hours_per_fortnight
ELSE IF (to_duration_units = 'M') THEN
  to_duration = hours / hours_per_month
ELSE IF (to_duration_units = 'Y') THEN
  to_duration = hours / hours_per_year
ELSE
  to_duration = 0
RETURN to_duration

```

3. Compile the formula.

For more information on editing a formula, see: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

Setting Up and Configuring Working Hours

The Hours Worked report, and the Employee Hours Worked Trend Analytics Workbook, enable you to investigate the number of regular hours and overtime hours worked by employees in your enterprise.

Within Oracle Human Resources you use elements to record the number of regular and overtime hours worked. You can set up different elements to represent overtime bands and regular hours. This gives you the freedom to record and pay employees exactly how you want.

To use the Hours Worked report or workbook, you need to set up information about

how you are recording regular and overtime hours. To do this you use Oracle FastFormula. You first need to create database items for the input values of the elements that record regular and overtime hours.

1. Create Database Items

Create a database items for the input values of the elements that record regular hours and overtime hours.

See: Creating Database Items for Working Hours Input Values, page 3-17

2. Regular Hours Formula

You first need to create a formula to calculate the regular hours recorded for your employees.

You must name the regular hours formula BIS_REG_HOURS. This is the formula that the Hours Worked reports look for when calculating the regular hours.

The formula type must be QuickPaint.

Set up your formula as follows to display regular hours on the Hours Worked reports:

```
default for <element name>_<input name>_entry_value is 0.00
hours_worked =
<element name>_<input name>_entry_value
Return hours_worked
```

In the above code <element name>_<input name>_entry_value represents the database item you created for the input value of the element that records regular hours. Replace the following:

- **<element name>:** Replace with the name of the element you are using to record regular hours worked.
- **<input name>:** Replace with the name of the input value on the element you are using to record regular hours worked.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

3. Overtime Band formula

Most enterprises have more than one overtime band set up. For example, you may have an overtime band for double time, time and a half, triple time and so on.

You need to create a formula for each overtime band you use. You must name your formulas:

- BIS_OT_BAND1
- BIS_OT_BAND2
- BIS_OT_BAND3
- ... and so on.

The number at the end of the formula name should change with each overtime band.

Set up the formula type as QuickPaint.

You can set up the elements that record overtime in different ways:

- A single element with input for each overtime band
- Multiple elements, one for each overtime band

Whichever method you use, you need to set up one formula for each overtime band. Base your formulas on the following code:

```
default for <element name>_<input name>_entry_value is 0.00
hours_worked = to_number(<element name>_<input name>_entry_value)
return hours_worked
```

In the above code <element name>_<input name>_entry_value represents the database items you created for the input value of each element that record overtime hours. Replace the following:

- **<element name>:** Replace with the name of the element you are using to record overtime hours worked.
- **<input name>:** Replace with the name of the input value on the element you are using to record overtime hours worked.

The Hours Worked report shows up to 10 overtime bands, therefore, for this report, you can write up to 10 formulas. The Employee Hours Worked Trend Analytics Workbook displays one overtime band as default, but you can customize this workbook to display however many overtime bands you use in your enterprise.

The Hours Worked report uses the description you enter in the Description field of the Oracle Human Resources Formula window to label each overtime bar on the chart. It only uses the first 20 characters of the description.

See: Writing or Editing a Formula, *Oracle HRMS FastFormula User Guide*

4. Overtime Band Formulas in the United States

If you are using Oracle Human Resources in the United States and you use the predefined Overtime element to record information about overtime, writing the formula is simple. Oracle Human Resources provides a predefined example of the formula you need to write. The example formula is called EXAMPLE_BIS_OT_BAND1 and you can view it using the Formula window.

The sample formula is shown below:

```

/*****
FORMULA NAME: EXAMPLE_BIS_OT_BAND1
FORMULA TYPE: Quickpaint
DESCRIPTION: This is an example of the syntax required for the
             formula you need to set up for use with
             the Hours Worked Report. The function
             get_hours_worked calculates total hours worked from
             the Overtime element predefined with US Payroll.
INPUTS: None
DBI Required: None
Change History
10 Sep 98 jmay Created
*****/
/* Defaults Section */
/* Inputs Section */
/* Main Body of Formula */
hours_worked = get_hours_worked(1.5)
RETURN hours_worked

```

Note: This example only works if you use the predefined US Overtime element.

For each overtime band your enterprise uses, set up a formula based on the example. You must name your formulas:

- BIS_OT_BAND1
- BIS_OT_BAND2
- BIS_OT_BAND3
- ... and so on.

The number at the end of the formula name should change with each overtime band.

Creating Database Items for Working Hours Input Values

Prior to amending the formula for configuring working hours, you need to create database items for the input values on the elements you use to record regular and overtime hours.

Use the Element window.

To create database items for working hours input values:

1. In the Name field, search for the name of the element used to record regular or overtime hours.
2. Click Input Values to go to the Input Values window.

3. Select Database Item to create a database item for the input value.

Repeat the above steps for each element you use to record hours.

Adapting the Hours Worked Workbook

The Employee Hours Worked Trend Analytics Workbook contains a calculation named Example Overtime Band 1. To display all the overtime bands used by your enterprise, you need to create new calculations for each overtime band. Use the predefined Example Overtime Band 1 calculation as your template.

The calculation text in Example Overtime Band 1 is:

```
SUM(HRI_UTL_GET_HOURS_WORKED('EXAMPLE_BIS_OT_BAND1',"Assignment Id (for  
Workbook Calculation)",NULL,Period End Date))
```

Use Oracle Discoverer User Edition.

To adapt the Hours Worked Workbook:

1. In Oracle Discoverer User Edition, open the HRMSi - Employee Hours Worked (Organization Hierarchy) Trend Analytics workbook.
2. Copy and rename the example calculation Example Overtime Band 1 for each overtime band you want to display in the report.
3. In the text of each new calculation, change EXAMPLE_BIS_OT_BAND1 to the name of each of one of your overtime band formulas.

Note: If you have not created Overtime Band formulas, see: Setting Up and Configuring Working Hours, page 3-14

4. Hide the example calculation.

Populating the Competence Level Hierarchy

Reports that use the competence level hierarchy gather information from the Competence Level Summary table.

Populate this summary table with your competence level hierarchy data. Use the HRI Load All Competence Level Hierarchy concurrent program. The program will collect pre-calculated data and store it in the Competence Level Summary table ready for use by the workbooks.

Use the Submit Requests window.

To populate the Competence Level Summary table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Competence Level Hierarchy.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
Collect From Date	The earliest date required for competence level hierarchy information (default is five years previous)
Collect To Date	The current date (default)
Full Refresh	Yes (default)

4. Submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load All Competence Level Hierarchy, page 3-2

Populating Job Competence Requirements

Reports that use the job competence requirements gather information from the Competence Requirement Fact Summary table.

You must populate this summary table with the job competence requirements used by your reports. Use the HRI Load All Competence Requirement Fact concurrent program. The program will collect pre-calculated data and store it in the Competence Requirement Fact Summary table ready for use by the workbooks.

Use the Submit Requests window.

To populate the Competence Requirement Fact Summary table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Competence Requirement Fact.

3. At implementation, use the following parameter values:

Parameter	Value at Implementation
Collect From Date	The earliest date required for competence requirement information (default is five years previous)
Collect To Date	The current date (default)
Full Refresh	Yes (default)

4. Submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load All Competence Requirement Fact, page 3-3

Populating the Time Dimension for Analytics

Analytics workbooks use time elements such as Year, Month, and Week. The workbooks will not return any data unless you populate the Discoverer End User Layer time dimension folders with time elements by using the Update Gregorian Hierarchy in the Time Dimension concurrent program.

The Update Gregorian Hierarchy in the Time Dimension concurrent program populates the Time dimension folders in the Developer HRMSi – Administration – Analytic Dimensions business area with time information. So, for example, it populates the Time Year – (Dimension Level) folder with a list of years, and the Time Month – (Dimension Level) folder with a list of months.

Use the Submit Requests window.

To populate the Time Dimension folders:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select Update Gregorian Hierarchy in the Time Dimension.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
Date From	The earliest date you need to see in your reports
Date To	The latest date you need to see in your reports

4. Submit your request.

What's Next

Run this program when required to collect dates further in the future. For full information on this concurrent program, see: Update Gregorian Hierarchy in the Time Dimension, page 3-4

Restrictions

Do not use an unnecessarily wide date range, as this will impede performance.

Populating the Geography Dimension

Prior to populating the geography dimension, you must set up the geography structures. See: Setting Up Geography, page 3-7

Run the HRI Load All Geography Category Structures concurrent program to populate the geography dimension with values. This concurrent program populates the location information stored in the HR_LOCATIONS_ALL table into a separate summary table.

Use the Submit Requests window.

To populate the geography dimension:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Geography Category Structures.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
Collect From Date	The earliest date required for geography information (default is one month previous)
Collect To Date	The current date (default)
Full Refresh	Yes (default is No)

4. Submit your request.

What's Next

Run this program when required to collect dates further in the future. For full information on this concurrent program, see: HRI Load All Geography Category Structures, page 3-4

Deploy the Data Warehouse Module

Deploy the Data Warehouse Module

Use the procedures in this topic in conjunction with the implementation steps to successfully set up the data warehouse module workbooks.

Programs to Populate the Data Warehouse Module

The HRMSi data warehouse module is based on collected data held in Embedded Data Warehouse (EDW) facts and dimensions. To populate the facts and dimensions you need to run collection and load programs.

Collection programs are concurrent programs that extract fact and dimension information from the HRMS source system into the interface tables on the warehouse. Load programs are concurrent programs that move fact and dimension information from the interface tables to the warehouse fact and dimension tables, respectively.

Run the fact and dimension collection programs on each source system that you want to collect data from.

Run the collection programs before you run the load programs to avoid dangling records. You should also collect dimensions before you collect facts, and load dimensions before you load facts.

Collection Programs

Run the following collect processes on the source system using the Site Warehouse Administrator Responsibility:

Collection Programs for Dimensions

- Collect Age Band Dimension
- Collect Assignment Change Dimension
- Collect Assignment Dimension
- Collect Grade (Human Resources) Dimension
- Collect Job Dimension
- Collect Movement Type Dimension
- Collect Organization Dimension
- Collect Period of Work Dimension

- Collect Person Dimension
- Collect Person Type Dimension
- Collect Position Dimension
- Collect Reason Dimension
- Collect Recruitment Activity Dimension
- Collect Requisition Vacancy Dimension
- Collect Sales Resource Dimension
- Collect Service Band Dimension
- Collect Geography Dimension
- Collect Time Dimension

Collection Programs for Facts

- Collect Workforce Activity Fact
- Collect Workforce Composition Fact
- Collect Workforce Recruitment Stage Fact
- Collect Workforce Separation Fact

Load Programs

You should run the following load processes on the target system using the Global Warehouse Administrator Responsibility:

Load Programs for Dimensions

- Load Age Band Dimension
- Load Assignment Change Dimension
- Load Assignment Dimension
- Load Grade (Human Resources) Dimension
- Load Job Dimension
- Load Movement Type Dimension
- Load Organization Dimension

- Load Period of Work Dimension
- Load Person Dimension
- Load Person Type Dimension
- Load Position Dimension
- Load Reason Dimension
- Load Recruitment Activity Dimension
- Load Requisition Vacancy Dimension
- Load Sales Resource Dimension
- Load Geography Dimension
- Load Time Dimension

Load Programs for Facts

- Load Workforce Activity Fact
- Load Workforce Composition Fact
- Load Workforce Recruitment Stage Fact
- Load Workforce Separation Fact

Run Frequency

Run the collection and load programs regularly to maintain the timeliness of the fact and dimension data.

However, be aware that if you have erroneously entered data in the HRMS database, then deleted it, and you have run a collection program in the meantime, the program will collect the erroneous data into the data warehouse. Given the size of the system, some erroneous data will be immaterial to the overall results in the reports.

If you want to avoid deleted records being incorrectly retained in facts, you should purge and re-collect the entire fact. When collecting the data for dimensions, if you set the End Date parameter to, say, a week prior to the collection date, you will lessen the chance of collecting erroneous table entries.

Standard Data Warehouse Configuration

The data warehouse module makes use of some predefined data, and some settings you already have in place. Therefore, configuration is optional. However, if you do not

configure the fact and dimensions, or you choose to configure after you have collected data, you should be aware of the following:

Implications of not configuring dimensions and facts

- **Age Band and Period of Work**

Age Band and Period of Work dimensions have predefined bands; these are described in more detail below. If you do not configure these dimensions, the collection process will use the seeded bands to collect data into the warehouse. If you configure these dimensions after you have collected data, the collection process brings the new bands into the warehouse, but does not remove old bands; this may cause confusion and you must re-collect any facts in order to point to the newly configured bands.

- **Job Category Sets**

You can add or remove Job Categories at any time, and when you run the collection process it will update the Job dimension with the changes. If you do not initially configure this dimension, the collection process collects all jobs with the predefined job category set only. If you configure the dimension at a later date, this does not impact on other data and you must re-collect facts. Data already collected may be inaccurate; to rectify this you need to re-collect the dimension.

The predefined job category set is described in more detail below.

- **Person Type Mappings**

HRMSi does not predefine data for this dimension. If you do not initially configure this dimension, the collection process collects person types as they are on the system. If you later need to map additional person types, the collection process adds these changes to the warehouse, but does not remove mappings; this could lead to confusion and you must re-collect any facts in order to use the new person types.

- **Workforce Separation**

HRMSi uses a formula to predefines some separation reasons in the warehouse as voluntary or involuntary. You can add separation reasons to the formula easily, and when you next run the collection program it will update the warehouse with your changes. If you do not configure the separation reasons, the warehouse uses the seeded values.

If you need to re-categorize a reason (for example, it was first collected as Voluntary but needs changing to Involuntary) you must re-collect the fact to pick up the change. To avoid this happening inadvertently, HRMSi stores and protects all reasons categorized by the formula; you need to call an API in order to allow a change through to the warehouse. See Updating Reasons below for more details.

Predefined data

The data warehouse module uses the following predefined data:

Age Bands

The Age dimension uses the following predefined values held within a table:

- 0 - 18 Years
- 18 Years - 26 Years
- 26 Years - 36 Years
- 36 Years - 46 Years
- 46 Years - 56 Years
- 56 Years - 66 Years
- 66 Years –

Each age band includes the lower limit, but excludes the upper limit, For example, someone aged exactly 18 is only included in the 18 Years - 26 Years band.

Period of Work Bands

The Period of Work dimension uses the following predefined values held within a table:

- 0 - 3 months
- 3 - 6 months
- 6 - 9 months
- 9 months - 1 year
- 1 - 2 years
- 2 - 3 years
- 3 - 4 years
- 4 - 5 years
- 5 - 10 years
- 10 - 15 years

- 15 - 20 years
- 20 - 25 years
- 25 - 35 years
- 35 - 45 years
- 45 - 55 years
- 55 years -

Each period of work band includes the lower limit, but excludes the upper limit. For example, someone who has worked for exactly 1 year is included only in the 1 - 2 years band.

Job Category Sets

The Job dimension contains one predefined job category set, with the following settings:

Job Category Set Number	Job Categories in Set	Value returned if job is outside the set
1	Revenue Generating Support	Not Revenue Generating or Support

Job Category Sets

When a job is defined, you can associate it with specific categories. For example, you could link the job Sales Clerk to the job categories Revenue Generating and General Administration, and you could link the job Support Engineer to the job categories Support and Technical, and you could link the job Secretary to the job categories General Administration and Secretarial.

Job category sets are groups of job categories; they enable you to report on a job category set as opposed to individual job categories.

The Job Dimension in the data warehouse has up to 15 columns corresponding to job category sets. If a job is associated with a job category that belongs to a job category set, the corresponding job category set column displays the job category. If a job is associated with none of the job categories in the job category set, the job category column displays the value you define as the opposite of the job category set.

For example, if you group the job categories Revenue Generating and Support into Job Category Set 1, and define the opposite of the job category set as Not Revenue Generating and Support, the Job Category Set 1 column will return values, as shown in

the following table:

Jobs and Associated Job Category Sets

Job	Job Category Set 1
Sales Clerk	Revenue Generating
Support Engineer	Support
Secretary	Not Revenue Generating or Support

If you add another job category set, for example, Job Category Set 2, with the job categories General Administration and Secretarial, and you define the opposite of the job category set as Not Administration, the Job dimension would represent the data as follows:

Jobs and Associated Job Category Sets

Job	Job Category Set 1	Job Category Set 2
Sales Clerk	Revenue Generating	General Administration
Support Engineer	Support	Not Administration
Secretary	Not Revenue Generating or Support	Secretarial

Job Category Sets work best when no job has more than one associated Job category from any given job category set. If a job is associated with more than one job category in a single job category set, the job category displayed is arbitrary.

See: Configuring Job Category Sets, page 3-31

Configuring Age Bands

The Age Band dimension uses a set of predefined age bands that you can configure to suit your system requirements.

Caution: If you do need to configure the age bands, Oracle recommends that you do so before you initially load data into the data warehouse. See: Standard Data Warehouse Configuration, page 3-25

To Add Age Bands:

1. Use the following API call:

```
HRI_EDW_DIM_AGE_BAND.INSERT_AGE_BAND(age_min_years, age_min_months)
```

Use the `age_min_years` and `age_min_months` parameters to specify the starting value of your new age band in months and years. You must enter a value for each parameter.

For example, to specify a new age band starting at 1 year you would enter the API call as follows:

```
HRI_EDW_DIM_AGE_BAND.INSERT_AGE_BAND(1, 0)
```

Alternatively, you could specify the start of the age band as 0 years and 12 months as follows:

```
HRI_EDW_DIM_AGE_BAND.INSERT_AGE_BAND(0, 12)
```

For an example of how to configure Age Bands, see Example Configuration Script, page 2-30

To Remove Age Bands:

1. Use the following API call:

```
HRI_EDW_DIM_AGE_BAND.REMOVE_AGE_BAND(age_min_years, age_min_months)
```

Use the `age_min_years` and `age_min_months` parameters to specify the starting value of the age band you wish to remove, in months and years. You must enter a value for each parameter.

For example, the following calls will both remove the age band starting at 1 year:

```
HRI_EDW_DIM_AGE_BAND.REMOVE_AGE_BAND(1, 0)  
HRI_EDW_DIM_AGE_BAND.REMOVE_AGE_BAND(0, 12)
```

For an example of how to configure Age Bands, see Example Configuration Script, page 2-30

Configuring Period of Work Bands

The Period of Work dimension uses a set of predefined period of work bands that you can configure to suit your system requirements.

Caution: If you do need to configure the period of work bands, Oracle recommends that you do so before you initially load data into the data warehouse. See: Standard Data Warehouse Configuration, page 3-25

To add Period of Work Bands:

1. Use the following API call:

```
HRI_EDW_DIM_SERVICE.INSERT_SERVICE_BAND  
(service_min_years,service_min_months,service_min_weeks,service_min_  
days)
```

The API parameters, service_min_years, service_min_months, service_min_weeks, and service_min_days, allow you to specify the starting value of a new period of work band in years, months, weeks and days, respectively. You can use any combination of these parameters. You must enter a value for each parameter.

For example, to add a period of work band starting at 60 years, you could use any of the following API calls:

```
HRI_EDW_DIM_SERVICE.INSERT_SERVICE_BAND(60,0,0,0)  
HRI_EDW_DIM_SERVICE.INSERT_SERVICE_BAND(59,12,0,0)  
HRI_EDW_DIM_SERVICE.INSERT_SERVICE_BAND(0,720,0,0)
```

For an example of how to configure Period of Work Bands, see Example Configuration Script, page 2-30

To remove Period of Work Bands:

1. Use the following API call:

```
HRI_EDW_DIM_SERVICE_BAND.REMOVE_SERVICE_BAND  
(service_min_years,service_min_months,service_min_weeks,service_min_  
days)
```

The API parameters, service_min_years, service_min_months, service_min_weeks, and service_min_days, allow you to specify the starting value of the period of work band you wish to remove in years, months, weeks and days respectively. You can use any combination of these parameters. You must enter a value for each parameter.

For example, to remove the period of work band starting at 60 years that was added in the previous example, you could use any of the following API calls:

```
HRI_EDW_DIM_SERVICE.REMOVE_SERVICE_BAND(60,0,0,0)  
HRI_EDW_DIM_SERVICE.REMOVE_SERVICE_BAND(59,12,0,0)  
HRI_EDW_DIM_SERVICE.REMOVE_SERVICE_BAND(0,720,0,0)
```

For an example of how to configure Period of Work Bands, see Example Configuration Script, page 2-30

Configuring Job Category Sets

The Job dimension uses a predefined job category set that you can configure to suit the reporting requirements of your enterprise.

Caution: If you do need to configure the job category sets, Oracle

recommends that you do so before you initially load data into the data warehouse. See: Standard Data Warehouse Configuration, page 3-25

To add a job category set:

1. Use the following API call:

```
HRI_EDW_DIM_JOB.ADD_JOB_CATEGORY  
(job_category_set, job_category_lookup, other_lookup)
```

API Parameters

- **job_category_set**

Use this parameter to specify the category set number.

- **job_category_lookup**

Use this parameter to define the lookup value for a job category to be included in the set.

- **other_lookup**

Use this parameter to define an "other" category for jobs with no associated job category in the set.

In each Job Category Set API call, either the other_lookup or the job_category_lookup must be null. This means that each job category and other lookup value require a separate API call.

Example

This example shows how to use API calls to add a job category set, Job Category Set 2, and associate it with the job categories Secretarial, General Administration, and an "other" category of Not Administration. The calls use the application utility lookups as shown in the following table:

Lookup Type	Lookup Code	Job Category (Lookup Meaning)
JOB_CATEGORY	SEC	Secretarial
JOB_CATEGORY	GA	General Administration
HRI_JOB_CATEGORY_SET S	NOT_ADM	Not Administration

To create the Job Category Set 2, you would need to follow this procedure:

1. Add the lookup code SEC with the meaning Secretarial to the Lookup Type

JOB_CATEGORY.

2. Add the lookup code GA with the meaning General Administration to the Lookup Type JOB_CATEGORY.
3. Add the lookup code NOT_ADM with the meaning Not Administration to the Lookup Type HRI_JOB_CATEGORY_SETS.
4. Use the following API calls:

```
HRI_EDW_DIM_JOB.ADD_JOB_CATEGORY(2, 'SEC', null)
HRI_EDW_DIM_JOB.ADD_JOB_CATEGORY(2, 'GA', null)
HRI_EDW_DIM_JOB.ADD_JOB_CATEGORY(2, null, 'NOT_ADM')
```

For an example of how to configure Job Category Sets, see Example Configuration Script, page 2-30

To remove a job category set:

1. Use the following API call:

```
HRI_EDW_DIM_JOB.REMOVE_JOB_CATEGORY
(job_category_set, job_category_lookup, other_lookup)
```

The parameters for this API are the same as those used to add job category sets. See Adding Job Category Sets above.

Example

To remove the category General Administration from Job Category Set 2, defined in the previous example, use the following API call:

```
HRI_EDW_DIM_JOB.REMOVE_JOB_CATEGORY(2, 'GA', null)
```

This would remove only the General Administration category, leaving the Secretarial and Not Administration categories in place.

For an example of how to configure Job Category Sets, see Example Configuration Script, page 2-30

Configuring Person Types

The Person Type dimension models the hierarchy based on the system and user person types on the Oracle HR transactional tables. The system person types could be, for example, Employee, Applicant, and Dependent; the user values enable you to configure different categories of these person types, for example, Night Worker (Employee) or Day Worker (Employee). It is possible for a person to have many different person types provided there is only one category of each system person type.

If you want to identify the person types on the warehouse, you need to map different categories of person type on the Oracle HR Transactional System to the desired person type on the warehouse. For example, you can map Agency Contractor (Employee) on the Oracle HR transactional tables to Agency Contractor on the warehouse. Without

this mapping, the dimension simply identifies the Agency Contractor person type as an Employee type.

You need to map the following warehouse person types in this way:

- AGENCY_CONTRACTOR
- CONSULTANT
- SELF_EMP_CONTRACTOR
- FIX_TERM_UPPER
- FIX_TERM_LOWER
- INTERN
- PERMANENT

In the Person Type Dimension, if any of these types are matched, the Employee Flag is set to Yes and the corresponding person type column contains the person type name.

For example, if you map the Oracle HR Transactional System person type of Training Consultant to the warehouse type of Consultant, then for people having this person type the Employee Flag is Yes, the Consultant Type column (the corresponding person type column) displays Training Consultant, and the Employee Type column is blank.

If you do not set up person type mappings, all employee person types appear in the Employee Type column, and the Consultant Type column is blank).

To add a person type mapping:

1. Use the following API call:

```
HRI_EDW_DIM_PERSON_TYPE.INSERT_USER_ROW  
(system_person_type,user_person_type,map_to_type)
```

API Parameters

- **system_person_type**
Use this parameter to define the person type with a system-generated person type.
- **user_person_type**
Use this parameter to define the person type with a user-defined person type.
- **map_to_type**
Use this parameter to specify one of the following EDW categories:
 - AGENCY_CONTRACTOR

- CONSULTANT
- SELF_EMP_CONTRACTOR
- FIX_TERM_UPPER
- FIX_TERM_LOWER
- INTERN
- PERMANENT

You can map a system_person_type/user_person_type combination to only one of the above map_to_type categories.

Example

To map a person type of Contractor, defined as a system person type of Employee, to the EDW map_to_type category of AGENCY_CONTRACTOR, use the API call as follows:

```
HRI_EDW_DIM_PERSON_TYPE.INSERT_USER_ROW
('EMP', 'Contractor', 'AGENCY_CONTRACTOR')
```

With this mapping, the collection process for the Person Type Dimension loads people with the person type of contractor (EMP) into the Data Warehouse as agency contractors.

For an example of how to configure Person Types, see Example Configuration Script, page 2-30

To remove person type mappings:

1. Use the following API call:

```
HRI_EDW_DIM_PERSON_TYPE.REMOVE_USER_ROW
(system_person_type,user_person_type)
```

Example

For example, to remove the person type mapping in the example above, you would use the API call as follows:

```
HRI_EDW_DIM_PERSON_TYPE.REMOVE_USER_ROW ('EMP', 'Contractor')
```

For an example of how to configure Person Types, see Example Configuration Script, page 2-30

Populating Facts and Dimensions

To populate the data warehouse module facts and dimensions you need to run collect and load programs.

For detailed information on the data warehouse collect and load programs, see:

Processes to Populate the Data Warehouse Module, page 3-23

Use the Submit Requests window.

To run a collection or load program:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select the name of the collect or load program you want to run.
3. Submit your request.

What's Next

You can use the schedule options to define when you want to run the collect and load programs.

Deploy Daily Business Intelligence for HRMS

Deploy Daily Business Intelligence for HRMS

Use the procedures in this topic in conjunction with the implementation steps to successfully set up Daily Business Intelligence for HRMS.

Programs to Populate DBI Base Summary Tables

HRMSi provides sets of concurrent programs to load and refresh the summary data structures used by the following dashboards:

- People Management
 - Chief HR Officer - Overview
 - Chief HR Officer - Headcount
 - Chief HR Officer - Turnover
 - HR Management - Overview
 - HR Management - Headcount
 - HR Management - Turnover
 - Contingent Worker Management
- Workforce Budget Management
- Open Enrollment Management
- Employee Absence Management

The request sets and programs are detailed below.

Important: Oracle recommends that you do not run these programs separately unless asked to do so by Oracle Support.

HR Management Initial and Incremental Request Set

Use the HR Management Initial request set to load the initial summary data, and fully refresh the base summary tables used by the People Management dashboards.

Use the HR Management Incremental request set to update the summary data, and fast

refresh the base summary tables used by the People Management dashboards. The concurrent programs in the HR Management request sets have default parameters set and need not be run separately.

HRI DBI Benefits Initial and Incremental Load Set

Use this request set to populate the base summary tables with all your data for the Open Enrollment Management dashboard.

The concurrent programs included in this request set are:

- HRI Load All Benefits Compensation Objects And Enrollment Periods, page 3-42
- HRI Load All Benefits Eligibility And Election Events, page 3-43
- HRI Load All Benefits Enrollment Actions, page 3-43

Workforce Budget Management Initial Request Set

Use this request set to populate the base summary tables with all your data for the Workforce Budget Management dashboard.

The concurrent programs included in this request set are:

- HRI Load All Labor Cost Actuals (Payroll Costing), page 3-39
- HRI Load All Labor Cost Commitments, page 3-39
- HRI Load All Budgets, page 3-40
- HRI Load All Organization Manager Hierarchies, page 3-40
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments, page 3-40
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By Organization Manager Hierarchy, page 3-40
- HRI Load All Labor Cost Budgets By Organization Manager Hierarchy, page 3-41
- HRI Load All Headcount Budgets By Organization Manager Hierarchy, page 3-41
- HRI Load Summarized Assignment Events by Organization Manager Hierarchy, page 3-42

Employee Absence Management Initial and Incremental Request Set

Use the Employee Absence Management initial request set to load the initial summary data, and fully refresh the base summary tables that the Employee Absence Management dashboard uses.

Use the Employee Absence Management incremental request set to update the summary data, and fast refresh the base summary tables that the Employee Absence Management dashboard uses. The concurrent programs in the Employee Absence Management request sets have default parameters set and need not be run separately.

Workforce Budget Management Initial Request Set Concurrent Programs

The following section provides description of the concurrent programs in the Workforce Budget Management Initial Request Set.

HRI Load All Labor Cost Actuals (Payroll Costing)

The HRI Load All Labor Cost Actuals (Payroll Costing) concurrent program populates the actuals fact table with payroll costing data for the employees.

Parameters

This concurrent program has the following parameters:

- **Collect From Date / Collect To Date**

These parameters define the start and end dates of the collection range. The program will store any costing data change occurring between these dates in the summary table.

This date range initially defaults from the BIS: Global Start Date to the Current System Date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the actual fact for the entire collection date range specified.

HRI Load All Labor Cost Commitments

The Load All Labor Cost Commitments concurrent program populates the commitments fact table with the commitment data for the employees in the enterprise.

Parameters

This concurrent program has the following parameters:

- **Collect From Date / Collect To Date**

This date range initially defaults from the BIS: Global Start Date to the Current System Date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the commitment fact for the entire collection date range

specified.

HRI Load All Budgets

The HRI Load All Budgets concurrent program populates the budgets fact with both headcount and money budgets defined for the enterprise.

Parameters

This concurrent program has the following parameters:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the budget fact for the entire collection date range specified.

HRI Load All Organization Manager Hierarchies

The HRI Load All Organization Manager Hierarchies concurrent program populates the organization manager hierarchy summary table with the reporting hierarchy of the organization managers defined in the enterprise.

Parameters

This concurrent program has the following parameter:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the organization manager hierarchy summary table for the entire collection date range specified.

HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments

The HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments concurrent program summarizes the commitment and the actual data for the enterprise.

Parameters

This concurrent program has the following parameters:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the combined commitments and actuals summary table for the entire collection date range specified.

HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By Organization Manager Hierarchy

The HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By

Organization Manager Hierarchy concurrent program collects the combined commitment and the actual data by organization manager hierarchy.

Parameters

This concurrent program has the following parameters:

- **Collect From Date / Collect To Date**

These parameters define the start and end dates of the collection range. The program will store any commitment data change occurring between these dates in the summary table.

This date range initially defaults from the BIS: Global Start Date to the Current System Date

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the combined commitment and actual data by organization manager hierarchy for the entire collection date range specified.

HRI Load All Labor Cost Budgets By Organization Manager Hierarchy

The HRI Load All Labor Cost Budgets By Organization Manager Hierarchy concurrent program collects the labor cost budget data by organization manager hierarchy.

Parameters

This concurrent program has the following parameter:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the labor cost budget data by organization manager hierarchy for the entire collection date range specified.

HRI Load All Headcount Budgets By Organization Manager Hierarchy

The HRI Load All Headcount Budgets By Organization Manager Hierarchy concurrent program collects the headcount budget data by organization manager hierarchy.

Parameters

This concurrent program has the following parameter:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the headcount budget data by organization manager hierarchy for the entire collection date range specified.

HRI Load Summarized Assignment Events by Organization Manager Hierarchy

The HRI Load Summarized Assignment Events by Organization Manager Hierarchy collects the assignment data for actual headcount by organization manager hierarchy.

Parameters

This concurrent program has the following parameters:

- **Collect From Date / Collect To Date**

These parameters define the start and end dates of the collection range. The program will store any assignment data for actual headcount by organization manager hierarchy occurring between these dates in the summary table.

This date range initially defaults from the BIS: Global Start Date to the Current System Date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the assignment data for actual headcount by organization manager hierarchy for the entire collection date range specified.

HRI DBI Benefits Initial and Incremental Load Set Concurrent Programs

This section provides information about the concurrent programs in the HRI DBI Benefits Initial and Incremental Load Set.

Note: If you want to collect enrollment data for the current enrollment period:

- Set the profile option HRI: Collect Enrollment in Progress to Yes.
- Set the Full Refresh parameter to No for the HRI: Load All Benefits Compensation Objects And Enrollment Periods process.
- Set the Full Refresh parameter to Yes for the other two processes: HRI: Load All Benefits Eligibility And Election Events, and HRI: Load All Benefits Enrollment Actions.

HRI Load All Benefits Compensation Objects And Enrollment Periods

Run the HRI Load All Benefits Compensation Objects And Enrollment Periods concurrent program to populate the compensation object, enrollment period and action type dimension with values.

Parameters

This concurrent program has the following parameter:

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates the dimension again. If you set Full Refresh to No, the program collects data in the incremental mode and inserts changed records without purging the table.

Note: If you want to collect enrollment data for the current enrollment period, set the Full Refresh parameter to No and ensure that you set the profile option HRI Collect Enrollment in Progress to Yes.

HRI Load All Benefits Eligibility And Election Events

This program populates the Benefits Eligibility And Election Events Fact table with eligibility and enrollment information.

Parameters

This concurrent program has the following parameters:

- **Collect From Date**

This parameter defines the start date of the collection range. The Collect From Date defaults to the Last Collected Date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates enrollment and election events data again.

If you set Full Refresh to No, the program collects data in the incremental mode and inserts changed records without purging the table.

If you want to collect enrollment data for the current enrollment period, set the Full Refresh parameters to Yes and ensure that you set the profile option HRI Collect Enrollment in Progress to Yes.

HRI Load All Benefits Enrollment Actions

This program populates the Benefits Enrollment Actions Fact table with enrollment action items information.

Parameters

This concurrent program has the following parameters:

- **Collect From Date**

This parameter defines the start date of the collection range. The Collect From Date defaults to the Last Collected Date.

- **Full Refresh**

If you set Full Refresh to Yes, the collection program purges previously inserted records and populates enrollment action items data again. If you set Full Refresh to No, the program collects data in the incremental mode and inserts changed records without purging the table.

If you want to collect enrollment action items data for the current enrollment period, set the Full Refresh parameter to Yes and ensure that you set the profile option HRI Collect Enrollment in Progress to Yes.

Checking System Profiles

Before you run DBI reports, check that the relevant system profiles are set up to suit your enterprise.

To check the system profiles for DBI for HRMS:

Use the System Profile Values window.

1. In the Find System Profile Values window, find each of the following system profiles:

System Profile	Description
Workforce Measurement Type	Determines how DBI for HRMS measures the size of your workforce. This application currently only supports the value of Headcount.
HRI: Workforce in Period Calculation Method	<p>This profile option determines the calculation that DBI reports use in averaging values over a period, for example, workforce turnover or average employee absence. Select from:</p> <p>Workforce End: headcount at the end date of the reporting period.</p> <p>Workforce Start + End Average: average of the headcount at the start date and the headcount at the end date of the reporting period.</p>

System Profile	Description
HRI:Enable Captured Events Archive	<p>This debugging option sets the archive mode for the events capture process. By default, this option is off. If you turn this option on, the system archives all events that trigger incremental processing.</p>
HRI:DBI Force Foundation HR Processes	<p>This profile option enables you to force the HRI Collection Programs to run in Foundation HR mode (on a Full HR Installation). Running in Foundation HR mode reduces the load times. The Foundation HR mode only collects data as of the system date; it does not maintain historical data.</p> <p>The default value is No. DBI for HRMS customers must not set this profile option to Yes.</p>
HRI:Populate Assignment Events Queue	<p>This profile option determines whether the system populates the incremental update queue for the assignment events process.</p> <p>The default value is Yes. DBI for HRMS customers must not set this profile option to No.</p> <p>Non-DBI for HRMS customers who never run the assignment events process, may set this option to No to reduce the load times of other processes.</p>
HRI:Populate Supervisor Hierarchy Events Queue	<p>This profile option determines whether the system populates the incremental update queue for the supervisor hierarchy process.</p> <p>The default value is Yes. DBI for HRMS customers must not set this profile option to No.</p> <p>Non-DBI for HRMS customers who never run the supervisor hierarchy process, may set this option to No to reduce the load times of other processes.</p>
HRI:Populate Supervisor Status History Events Queue	<p>This profile option determines whether the system populates the incremental update queue for the supervisor status history process.</p> <p>The default value is Yes. DBI for HRMS customers must not set this profile option to No.</p> <p>Non-DBI for HRMS customers who never run the supervisor status history process, may set this option to No to reduce the load times of other processes.</p>

System Profile	Description
HRI:Enable Detailed Logging	<p>If you encounter an error during the HRI data collection process, you can use a profile option to include a debug message in the concurrent manager log. Set the HRI:Enable Detailed Logging profile option to Yes. The default is No. Re-run the request sets to generate the error message in the log.</p> <p>Note: Only set this profile option to Yes if you encounter an error. Debugging the collection process impacts the collection timings.</p>
HRI: Collect Manager Snapshots	<p>This profile option determines whether snapshot collection process is on. Snapshot collection provides faster dashboard rendering for managers of large numbers of employees.</p> <p>The default value is Yes.</p>
HRI: Manager Snapshot Threshold	<p>This profile option determines the minimum number of staff required for the snapshot collection of a manager.</p> <p>The default is 2500.</p> <p>Note: Managers with a small number of staff reporting to them will observe no noticeable difference in dashboard rendering, even if they are above the threshold.</p>
HRI:DBI Chief HR Officer Named User	<p>This profile option enables Chief HR Officers to view the Chief HR Officer dashboards as if they are logged in as the CEO.</p> <p>Set the profile option at site level to the name of the CEO of the enterprise. This setting enables users of the Chief HR Officer responsibility to access the Chief HR Officer dashboards effectively as the CEO. Select the name of the CEO from the profile option list. The list shows only those at level 1 (the top of the hierarchy). To turn this profile off, set the profile option value to No.</p>

System Profile	Description
HRI:Period of Service/ Placement Date Start Source	<p>This profile option determines the date for calculating the employees' period of service. The default value is Start Date. With this setting, DBI for HRMS calculates the period of service from the beginning of employees' current period of service.</p> <p>To calculate the employee's period of service from the beginning of their first period of service, change the value to Adjusted Service Date.</p> <p>Note: HRMS also uses the Adjusted Service Date to calculate benefits. You must therefore consider the effect on benefits if you use this feature.</p> <p>If the Adjusted Service Date is later than the Latest Start of the employee assignment, then DBI for HRMS counts the Latest Start Date to calculate the period of service.</p>
HRI:DBI Link To Transaction System	<p>Set this profile option to HR Employee Directory, to enable line managers or the chief HR officer to view specific worker records through the links in the detail reports. The default value is HR Employee Directory.</p> <p>If you do not want managers to access worker records, then set the profile option value to Disable Link.</p>
HRI:Collect Open Enrollment in Progress	<p>Set this profile option to Yes to collect data in full refresh mode for the open enrollments in progress. If you want to collect historic data of enrollments along with the open enrollment data, then set the profile option value to No.</p>
HRI:Enable Benefits Collections and Event Queue	<p>Set this profile option to Yes to enable DBI for HRMS to record any updates to enrollments in the Event Queue tables. When you run the request set in the incremental mode, the application collects the changed enrollment data from these tables to display them in the reports.</p> <p>The default value is No.</p>

System Profile	Description
HRI:Absence Duration Units	<p>Set this profile option to Days or Hours to determine how the application displays absence duration values.</p> <p>The default value is days.</p>
HRI:Populate Absence Events Queue	<p>Set this profile option to Yes to process new absences related changes in the application. If this option is set to No the Incremental request set will not process any events leading the user to report on old information.</p> <p>The default value is No.</p>

2. Ensure each system profile option is set correctly for your system.

For non-DBI for HRMS customers, further considerations apply. See Information for Non-DBI for HRMS Customers, page 1-49

Managing Multi-Threading

Two profile options enable you to manage multi-threading of processes on multi-processor machines:

- **HRI:Multithreading Chunk Size**

This parameter determines the number of objects processed at one time during the main processing phase. The default value is 200. You can change this to a value between 1 and 16000. However, you should avoid processing a large numbers of objects, and the default value is the result of benchmark tests. If you receive the error "Oracle exception: cannot extend rollback segment" during the collection process, you may want to reduce the value for this profile option.

- **HRI:Number of Threads to Launch**

This parameter determines the number of threads, or sub-processes, that run in parallel on multi-processor machines. If you have already installed PYUGEN on your system, you should set this profile option to equal the THREADS parameter defined for PYUGEN. The default value for this parameter is 8.

Note: Your Applications System Administrator must define the concurrent manager to allow the required number of sub-processes to run in parallel.

This utility replaces the use of PYUGEN.

To manage multi-threading:

Use the System Profile Values window.

1. In the Find System Profile Values window, find each of the following system profiles:
 - HRI:Multithreading Chunk Size
 - HRI:Number of Threads to Launch
2. Set each system profile option appropriately for your system.

Defining Separation Categories

The Workforce Separations KPI, Daily Business Intelligence for HRMS, and the EDW module of HRMSi use separation categories to count the number of employees leaving either voluntarily or involuntarily.

The formula, HR_MOVE_TYPE_TEMPLATE, categorizes your leaving reasons into voluntary and involuntary separation categories. You define separation categories as lookups of type HRI_LOSS_TYPES.

The current categories are:

Lookup Codes and Meanings for HRI_LOSS_TYPES (Separation Categories)

Lookup Code	Lookup Meaning
SEP_INV	Involuntary
SEP_VOL	Voluntary
SEP_MTL	Mutual
SEP_NA	Not Specified

Note: Currently the delivered KPIs and reports only support Involuntary and Voluntary as Separation Categories. Classifying Separation Reasons into the other categories (i.e. Mutual and Not Specified) does not affect the reports, so the information in the reports may be incorrect.

You can define separation reasons as any lookup of type LEAV_REAS.

The formula `HR_MOVE_TYPE_TEMPLATE` categorizes your separation reasons to separation categories. You can replace this formula with your own configured version. The HRI Load Separation Reasons Table concurrent program runs the formula, and stores the results in a table for use when you run a report or KPI.

1. Categorize Separation Reasons

If you want to configure the separation categories, copy the `HR_MOVE_TYPE_TEMPLATE` formula and save it as `HR_MOVE_TYPE`. You can then amend the new formula if necessary.

See: Categorizing Separation Reasons, page 3-50

2. Load Separation Reasons

Once you are satisfied with the `HR_MOVE_TYPE` formula, run the concurrent program HRI Load Separation Reasons Table. You must run this program whether you have changed the formula or not.

See: Loading Separation Reasons, page 3-52

Categorizing Separation Reasons

The `HR_MOVE_TYPE_TEMPLATE` formula categorizes your Separation Reasons into Separation Categories. Use the formula in conjunction with the HRI Load Separation Reasons Table concurrent program to populate a table. DBI for HRMS gathers separation reasons from this table. This setup provides flexibility and improves performance.

You can configure and extend the `HR_MOVE_TYPE_TEMPLATE` formula as necessary to categorize new Separation Reasons or re-categorize existing Separation Reasons by copying the template formula and renaming it to `HR_MOVE_TYPE`.

The important lines in the template formula text are:

- **`termtype='V'`**
This defaults the separation category to voluntary (V), if a specific leaving reason is not given.
- **`IF leaving_reason = 'R' THEN termtype = 'V'`**
This ensures that where retirement (R) is given as leaving reason, the formula returns a voluntary (V) separation category.
- **`IF leaving_reason = 'D' THEN termtype = 'V'`**
This ensures that where death (D) is given as the leaving reason, the formula returns a voluntary (V) separation category.
- **`IF leaving_reason = 'G' THEN termtype = 'I'`**
This ensures that where gross misconduct (G) is given as the leaving reason, the

formula returns an involuntary (I) separation category.

- **RETURN termtype**

Returns the separation category.

If you add a new leaving reason to the formula, you must have previously defined it in the lookup type LEAV_REAS. Leaving reasons are associated with categories, where termtype represents the category. You can only use categories of V for Voluntary, or I for Involuntary.

If you have defined a leaving reason in the lookup type but not added it to the formula, it will default to category V for Voluntary.

Note: The HR_MOVE_TYPE formula is used in a number of other reporting areas. If you change the formula content, those reports will also change. It is currently being used by Embedded Data Warehouse (EDW). If you have implemented EDW, then changing this formula could affect the collection of data into the EDW fact tables. Please refer to the relevant HRMSi EDW documentation on this.

Perform this optional step from the Setup Business Group.

To categorize Separation Reasons:

You must use a responsibility that has Setup Business Group set for the HR: Business Group profile option.

Use the Formula window.

1. Select the HR_MOVE_TYPE_TEMPLATE formula.
2. Click on Edit and copy the formula body.
3. Create a new formula called HR_MOVE_TYPE.
4. Click on Edit and paste in the HR_MOVE_TYPE_TEMPLATE template contents.
5. Edit the formula code to add new leaving reasons, or re-categorize existing leaving reasons.
6. Compile the new formula.

Whenever you update the formula you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the People Management dashboards. See: Populating the DBI Base Summary Tables, page 3-72

Loading Separation Reasons

The `HR_MOVE_TYPE_TEMPLATE` formula, or its configured version, `HR_MOVE_TYPE`, categorizes your separation reasons into separation categories. The concurrent program HRI Load Separation Reasons Table runs the formula and stores the results in a table for use when you run report or KPI.

Whether you amend the formula or not, you must run the concurrent program HRI Load Separation Reasons Table.

Note: Both the HRI DBI Update Request Set and the HRI DBI Initial Load Request Set include the HRI Load Separation Reasons Table concurrent program. The program therefore runs automatically when you run either of these request sets.

To Load Separation Reasons:

Use the Submit Requests window.

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load Separation Reasons Table.
3. Submit your request.

What's Next

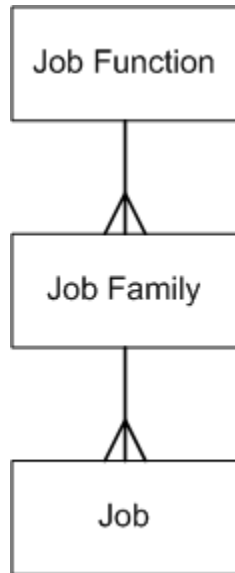
After implementation, only run the HRI Load Separations Reasons Table concurrent program after changes to the `HR_MOVE_TYPE` formula.

Note: If you implement EDW, do not schedule the HRI Load Separation Reasons Table process to run regularly. Run this process only as needed when you understand the full implications on the Workforce Separation fact re-collection. See: Processes to Populate the Data Warehouse Module, *Oracle HRMS Deploy Strategic Reporting (HRMSi)*

Setting Up the Job Hierarchy

You can use links in the Salary report to drill to more detailed reports.

For the drill reports from the Salary report to fully function, you need to set up Job Functions and Job Families within a hierarchical structure. Job Function is the parent of Job Family, and Job Family is the parent of Job.



Oracle DBI for HRMS associates a Job Family with a Job Function if a Job is associated with both the Job Family and the Job Function. You define both Job Function and Job Family using segments in the Job key flexfield or descriptive flexfield. Typically, you set up Job Family as dependent on Job Function.

When you drill from the Job Function to the Job Family report, the report displays only those Job Families that are associated with the Job Function.

1. Define Job Function and Job Family value sets

If you have not done so already, define Job Function and Job Family value sets for the Job key flexfield, or a Job descriptive flexfield.

Select one of the following Validation Types for each value set:

- **Table:** The validation SQL must be valid and the WHERE clause cannot contain any non-contextual conditions (these can be pushed into the underlying object using a view).
- **Independent:** You can use this validation type for the Job Function value set, instead of Table validation type.
- **Dependent:** If you used Independent validation type for Job Function, you can use this validation type for the Job Family value set.

Note: If you add or remove Job Family or Job Function values in the future, run HR Management Initial Request Set or HR Management Incremental Request Set to update the DBI base tables. See: Populating DBI Summary Data Structures, page 3-72

Use the Value Sets window.

See: Defining Value Sets, *Oracle Applications Flexfields Guide*

2. Define the Job Flexfield Structure

If you have not done so already, associate the Job Family and Job Function value sets with either the Job key flexfield, or a Job descriptive flexfield.

HRMS uses the Job key flexfield values as part of the job name throughout HRMS; if you use the Job descriptive flexfield, HRMS will not incorporate the job family and job function values into the job name.

Note: Job value sets linked to a key flexfield take precedence over those linked to descriptive flexfields. If you have a Job value set linked to one or more Job key flexfields, the application will not use any value sets linked to a Job descriptive flexfield. However, you can link a Job family value set to the key flexfield and a Job function value set to the descriptive flexfield and vice versa.

Associate the Job Family value set with the Job flexfield segment that holds the Job Family. Associate the Job Function value set with the Job flexfield segment that holds the Job Function.

Use the Key Flexfield Segments window or the Descriptive Flexfield Segments window.

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide* and Defining Descriptive Flexfield Structures, *Oracle Applications Flexfields Guide*

3. Structure the Job Hierarchy

Associate your Job Family and Job Function value sets with the HR: BIS Job Hierarchy – Job Grouping Level 1 and the HR: BIS Job Hierarchy – Job Grouping Level 2 profile options to structure your Job hierarchy.

Use the System Profile Values window.

See: Structuring the Job Hierarchy, page 3-55

4. Associate Jobs with a Job Family and Job Functions

To structure your jobs within the Job hierarchy, you need to associate each job with a Job Family and a Job Function. Use the Job Name field of the Job window.

See: Defining a Job, *Oracle HRMS Enterprise and Workforce Management Guide*

5. Check the Job Hierarchy Setup

If you selected Table validation of your value sets, check your Job Function and Job Family hierarchy setup. To check the setup, populate the database tables and views. You can then query the associated views to ensure they have been populated with job function and job family values, and check that their performance is efficient.

See: Checking the Job Hierarchy Setup, page 3-55

Structuring the Job Hierarchy

Use your Job Family and Job Function value sets to structure your Job Hierarchy.

Use the HR: BIS Job Hierarchy – Job Grouping Level 1 profile option to define your Job Function value set as the first level in the Job hierarchy. Use the HR: BIS Job Hierarchy – Job Grouping Level 2 profile option to define your Job Family value set as the second level.

To associate value sets with profile options:

Use the System Profile Values window.

1. In the Find System Profile Values window, find the HR: BIS Job Hierarchy – Job Grouping Level 1 Profile Option.
2. At Site Level, enter the name of your Job Function value set.
3. In the Find System Profile Values window, find the HR: BIS Job Hierarchy – Job Grouping Level 2 Profile Option
4. At Site Level, enter the name of your Job Family value set.

Checking the Job Hierarchy Setup

Perform this check if you selected Table validation of your Job Function and Job Family value sets. To check your Job Function and Job Family hierarchy setup, populate the database tables and views by running the HRI Load All Job Hierarchies process.

Note: You only need to run this process to check your setup. You normally populate the Job Hierarchy when you run the HR Management Initial Request Set and the HR Management Incremental Request Set. See: Programs to Populate DBI Summary Data Structures, page 3-37

You can then query the associated views to ensure they have been populated with job function and job family values, and check that their performance is efficient.

Be aware that if you did not associate Jobs with a given Job Family or Function, when you drill on the Headcount value on the Salary report, the Job Function column may have the value of Unassigned.

1. Check the Job Hierarchy structure setup.
See: Checking the Job Hierarchy Structure Setup, page 3-56
2. Check the Job Hierarchy database setup.

See: Checking the Job Hierarchy Database Setup, page 3-56

Checking the Job Hierarchy Structure Setup

Once you have set up the Job hierarchy, if you are using table validation of the value sets, check your Job Function and Job Family hierarchy setup. To check the Job Hierarchy structure, populate the database tables and views by running the HRI Load All Job Hierarchies process.

To check the Job Hierarchy structure setup:

Use the Submit Requests window.

1. Run the HRI Load All Job Hierarchies process in full refresh mode.
2. Check the process log for errors and warnings.

Checking the Job Hierarchy database setup

Once you have checked the Job hierarchy structure, if you are using table validation of the value sets, check the Job Hierarchy database setup.

Check the performance of the views derived from the validation SQL by analyzing:

```
SELECT * FROM hri_cl_job_family_v WHERE id = :id;  
SELECT * FROM hri_cl_job_function_v WHERE id = :id;
```

Setting Up Job Roles

Create a QuickPaint formula named HRI_MAP_JOB_JOB_ROLE to identify job roles in your enterprise. This formula enables DBI categorize people in your enterprise into the appropriate job role and helps the chief HR officer distinguish HR workers from other workers.

DBI for HRMS uses the formula during the collection process to populate the dimension level HRMS Job Role. You must create this formula in the delivered Setup Business group.

To create a formula to identify job roles:

1. For the Setup business group, use your local Super HRMS Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Select QuickPaint as the formula type.

4. Choose the Edit button to open a blank Edit Formula window.

Use the following sample formula as a guide. The formula determines job role from the job family, job function, or a combination of both. The sample formula returns job role as HR for the following cases:

- Job family code is RECRUIT and job function code is SEARCHING.
- Job family code is PAYROLL and job function code is undefined.
- Job family code is HR.

The sample formula categorizes all other job family and job function combinations as non-HR.

The formula must have the following inputs:

- job_family_code
- job_function_code

The formula must have the following output:

job_role_code

Note: Currently, the output from the formula must be either HR or NA_EDW. The application automatically changes all other outputs to NA_EDW.

HRI_MAP_JOB_JOB_ROLE Sample Formula

```
INPUTS ARE job_family_code (text), job_function_code (text)
DEFAULT for job_family_code IS 'NA_EDW'
DEFAULT for job_function_code IS 'NA_EDW'
job_role_code = 'NA_EDW'
```

```
IF job_family_code = 'RECRUIT' AND job_function_code = 'SEARCHING'
THEN ( job_role_code = 'HR' )
ELSE IF job_family_code = 'PAYROLL' AND job_function_code = 'NA_EDW'
THEN ( job_role_code = 'HR' )
ELSE IF job_family_code = 'HR'
THEN ( job_role_code = 'HR' )
ELSE ( job_role_code = 'NA_EDW' )

RETURN job_role_code
```

5. Click Verify button to compile the formula.
6. Save your work.

Whenever you update the formula you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the People Management dashboards. See: Populating the DBI Base Summary Tables, page 3-72

Setting Up the Length of Work Bands

DBI for HRMS uses the Business Intelligence Bucketing utility to divide the number of months that employees have worked into bands. The Human Resources Intelligence - Length of Work Banding bucket contains the following default bands:

Name	Range Low Value	Range High Value
< Year	0	12
1 - 3 Years	12	36
3 - 5 Years	36	60
5 - 10 Years	60	120
> 10 Years	120	(no value)

You cannot add new bands, but you can update the band names and the distribution of values.

Important: If you update the band values, you must set the lower limit of lowest band to 0, and you must leave the higher limit of highest band open (no value).

To update Length of Work Bands:

1. Use the Daily Business Intelligence Administrator responsibility to navigate to the Buckets window.
2. Search for Human Resources Intelligence - Length of Work Banding.
3. Click the Edit icon to update the Human Resources Intelligence - Length of Work Banding bucket.
4. Apply your changes.

Whenever you update the Length of Work bands you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the HR Management dashboards. See Populating the DBI Base Summary Tables, page 3-72

Setting Up the Period of Placement Bands

DBI for HRMS uses the Business Intelligence Bucketing utility to divide the number of months that contingent workers have worked into bands. The Human Resources Intelligence - Period of Placement Banding bucket contains the following default bands:

Name	Range Low Value	Range High Value
< 3 months	0	3
3 - 6 months	3	6
6 - 12 months	6	12
12 - 24 months	12	24
> 24 months	24	(no value)

You cannot add or delete bands, but you can update the band names and the distribution of values.

To update the Period of Placement Bands:

1. Use the Daily Business Intelligence Administrator responsibility to navigate to the Buckets window.
2. Search for Human Resources Intelligence - Period of Placement Banding.
3. Click the Edit icon to update the Human Resources Intelligence - Period of Placement Banding bucket.
4. Apply your changes.

Whenever you update the Period of Placement bands you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the Contingent Worker Management dashboards. See: Populating the DBI Base Summary Tables, page 3-72

Setting Up Performance Bands

DBI for HRMS uses the Business Intelligence Bucketing utility to divide HRMS Performance ratings into bands. The Performance Band bucket is called Human Resources Intelligence Performance Banding, and has the following default bands:

Name	Range Low Value	Range High Value
Low	0	33
Mid	33	66
High	66	100

You cannot add or delete bands, but you can update the band names and the distribution of values.

Whenever you update the Performance bands you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the People Management dashboards. See: *Populating the DBI Base Summary Tables*, page 3-72

The range values represent percentage values of employee performance ratings.

DBI for HRMS cannot use employee performance ratings directly. You need to create a formula to map your performance ratings to percentage values. You need to create one of two formulas, depending on whether you collect employee Performance ratings using:

- Performance Reviews (Professional User Interface), or
 - Appraisals (Self-Service).
1. If you collect performance ratings for performance reviews using the Professional User Interface, you need to create a formula to capture your performance review ratings into bands. If you do not set up this formula, DBI reports display performance rating as Unassigned.
See: *Creating a Formula for Performance Review Ratings*, page 3-61
 2. If you collect performance ratings for appraisals using Self-Service, you need to create a formula to capture your performance appraisal ratings into bands. However, if you do not create this formula for all business groups, the HRI_GENERATE_FAST_FORMULA process, which is part of the request set for HR Management dashboards, automatically generates a formula to transform your performance ratings into percentage values. This process only generates a formula for business groups that have employees.
See: *Creating a Formula for Performance Appraisal Ratings*, page 3-62
 3. You can update the Performance Banding bucket to redistribute your performance rating percentage values across the bands.
See: *Updating the Performance Banding Bucket*, page 3-63

Creating a Formula for Performance Review Ratings

If you collect performance ratings for performance reviews, using the Professional User Interface, you need to create the NORMALIZE_REVIEW_RATING formula. You need to create this formula in the Setup business group.

In the formula, specify the percentage rating for each performance rating. You should aim to distribute the performance ratings evenly across the three performance bands. For example, assuming you use the default band values, if there are five performance ratings and one rating is low, two are mid values, and two are high values, you need to ensure that the low rating falls between 0-33, the mid ratings need a range between 33-66, and high between 66-100. At any given point in time only 1 performance rating is valid for a person.

To create a formula for Performance Review Ratings:

1. For the Setup business group, use your local Super HRMS Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Enter NORMALIZE_REVIEW_RATING as the formula's name.
4. Select QuickPaint as the formula type.
5. Choose the Edit button to open a blank Edit Formula window.
6. Use the following sample formula as a guide. Evaluate each appraisal in the business group to decide whether you want to include it in the DBI for HRMS performance reports. For each appraisal you want to include (SKIP_REVIEW = 'N'), match the ratings to your appraisal ratings, and set the NORMALIZED_RATING values (percentages) as appropriate to achieve an even spread of ratings across the Performance bands.

NORMALIZE_REVIEW_RATING Sample Formula

```

INPUTS are REVIEW_TYPE (Text), RATING (text)
DEFAULT for REVIEW_TYPE is 'ANN'
DEFAULT for RATING is '0'
SKIP_REVIEW = 'Y'
NORMALIZED_RATING = -1

IF REVIEW_TYPE = 'ANN' THEN
( SKIP_REVIEW = 'N'
IF RATING = '1' THEN (NORMALIZED_RATING = 20)
IF RATING = '2' THEN (NORMALIZED_RATING = 40)
IF RATING = '3' THEN (NORMALIZED_RATING = 60)
IF RATING = '4' THEN (NORMALIZED_RATING = 80)
IF RATING = '5' THEN (NORMALIZED_RATING = 100)
)

IF REVIEW_TYPE = 'EXIT' THEN
( SKIP_REVIEW = 'Y' )

RETURN SKIP_REVIEW, NORMALIZED_RATING

```

7. When you finish writing the formula, choose the Verify button to compile it.
8. When the formula is verified successfully, save it.

Creating a Formula for Performance Appraisal Ratings

If you collect performance ratings for appraisals using Self-Service, you need to create the NORMALIZE_APPRAISAL_RATING formula. You need to create this formula for each business group. However, if you do not create this formula for all business groups, the HRI_GENERATE_FAST_FORMULA process, which is part of the request set for HR Management dashboards, automatically transforms your performance ratings into percentage values.

In the formula, specify the percentage rating for each performance rating. You should aim to distribute the performance ratings evenly across the three performance bands. For example, assuming you use the default band values, if there are five performance ratings and one rating is low, two are mid values, and two are high values, you need to ensure that the low rating falls between 0-33, the mid ratings need a range between 33-66, and high between 66-100. At any given point in time only 1 performance rating is valid for a person.

1. For each business group, use your local Super HRMS Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Enter NORMALIZE_APPRAISAL_RATING as the formula's name.
4. Select QuickPaint as the formula type.
5. Choose the Edit button to open a blank Edit Formula window.

6. Use the following sample formula as a guide. Evaluate each appraisal in the business group to decide whether you want to include it in the DBI for HRMS performance reports. For each appraisal you want to include (SKIP_REVIEW = 'N'), match the ratings to your appraisal ratings, and set the NORMALIZED_RATING values (percentages) as appropriate to achieve an even spread of ratings across the Performance bands.

NORMALIZE_APPRAISAL_RATING Sample Formula

```
INPUTS are APPRAISAL_TEMPLATE_NAME (Text), RATING (text)
DEFAULT for APPRAISAL_TEMPLATE_NAME is 'SKIPPP'
DEFAULT for RATING is '0'
SKIP_REVIEW = 'Y'

IF APPRAISAL_TEMPLATE_NAME = 'Annual Performance Appraisal' THEN
( SKIP_REVIEW = 'N'
IF RATING = 1 THEN (NORMALIZED_RATING = 1)
IF RATING = 2 THEN (NORMALIZED_RATING = 25)
IF RATING = 3 THEN (NORMALIZED_RATING = 50)
IF RATING = 4 THEN (NORMALIZED_RATING = 75)
IF RATING = 5 THEN (NORMALIZED_RATING = 100 )
)

IF APPRAISAL_TEMPLATE_NAME = 'Competence Rating Assessment' THEN
( SKIP_REVIEW = 'Y' )

RETURN SKIP_REVIEW, NORMALIZED_RATING
```

7. When you finish writing the formula, choose the Verify button to compile it.
8. When the formula is verified successfully, save it.

Updating the Performance Banding Bucket

The Performance Band bucket, Human Resources Intelligence Performance Banding, maps the percentage values from the NORMALIZE_APPRAISAL_RATING formula, or the NORMALIZE_REVIEW_RATING formula, to performance bands for use in DBI for HRMS reports.

The Performance Band bucket has the following default bands:

Name	Range Low Value	Range High Value
Low	0	33
Mid	33	66
High	66	100

You cannot add new bands, but you can update the band names and the distribution of

values.

To update the Performance Bands:

1. Use the Daily Business Intelligence Administrator responsibility to navigate to the Buckets window.
2. Search for Human Resources Intelligence - Performance Banding.
3. Click the Edit icon to update the Human Resources Intelligence - Performance Banding bucket.
4. Apply your changes.

Whenever you update the Performance bands you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the HR Management dashboards. See Populating the DBI Base Summary Tables, page 3-72

Setting Up Area Geography Dimension

To view report data across areas, you must set up the Geography dimension. If you use HRMSi Analytics reports you may already have defined the Geography dimension. DBI for HRMS only requires you to define the Area to Country dimension levels. (Analytics reports use the Region level as well.)

To define the Area and Country levels of the Geography dimension, you first need to define your areas. Country is an existing dimension and is already defined in Oracle Applications. Once you have defined your areas, you need to assign countries to your areas.

To define areas:

1. Log in to the Daily Business Intelligence Administrator responsibility.
2. Click Define Geography Dimension link in the Setup: Global menu.
3. Click Create Area in the Area page.
4. Add desired areas, for example, North America, EMEA, or Asiapac.
5. Click Apply to save your work

To assign countries to areas:

You can add countries after you create areas or add countries to areas later.

1. Navigate to the Area page.

2. Search an area that you have created.
3. Click Update to add countries to your area.
4. In the Update Area page, select the countries you want to associate with the selected area.

Note: Ensure that the HR location has a valid address style defined in the Location window of Oracle HRMS. Otherwise the country/area appears as Unassigned, when managers view reports using the Area/Country parameter or View by.

5. Repeat for other areas as necessary.
6. Save your work.

Categorizing Workers

Create a QuickPaint formula named HRI_MAP_WORKER_TYPE to exclude certain people groups from DBI reports. Use this formula to specify which person types in each business group you want to report on. DBI for HRMS uses the formula during the collection process.

The formula returns a value for each person type to specify whether to include the person type in the reports. In addition, it returns a value to specify the category of each person type.

To create a formula to categorize workers:

1. For the Setup business group, use your local Super HRMS Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Enter HRI_MAP_WORKER_TYPE as the formula name.
4. Select QuickPaint as the formula type.
5. Choose the Edit button to open a blank Edit Formula window.

Use the following sample formula below as a guide. The formula determines the worker type and sub-types, and whether or not to include a person in the reports.

The formula must have the following inputs:

- system_person_type

- user_person_type
- primary_flag
- employment_category
- assignment_type

Note: The Employment Category input corresponds to the Assignment Category field in the Assignment window of Oracle HRMS.

The formula must have the following outputs:

include_in_reports

The formula may have the following outputs:

- worker_type_lvl1
- worker_type_lvl2

These optional outputs are for future use to further group person types, for example into permanent or temporary employees, or into long-term or short-term employees.

HRI_MAP_WORKER_TYPE Sample Formula

```

INPUTS ARE
  system_person_type (text),
  user_person_type (text),
  employment_category (text),
  primary_flag (text),
  assignment_type (text)

  DEFAULT FOR system_person_type IS 'NA_EDW'
  DEFAULT FOR user_person_type IS 'Unassigned'
  DEFAULT FOR employment_category IS 'NA_EDW'
  DEFAULT FOR primary_flag IS 'NA_EDW'
  DEFAULT FOR assignment_type IS 'NA_EDW'

  include_in_reports = 'Y'
  worker_type_lv11 = 'NA_EDW'
  worker_type_lv12 = 'NA_EDW'

  IF ((employment_category = 'PR' OR employment_category = 'PT') AND
  worker_type = 'EMP')
  THEN
    worker_type_lv11 = 'PART'
  ELSE
    worker_type_lv11 = 'FULL'

  IF (employment_category = 'FT' OR employment_category = 'PT') THEN
    worker_type_lv12 = 'TEMP'
  ELSE
    worker_type_lv12 = 'PERM'

  RETURN include_in_reports, worker_type_lv11, worker_type_lv12

```

6. When you finish writing the formula, choose the Verify button to compile it.
7. When the formula is verified successfully, save it.

Whenever you update the formula you must perform a full refresh of the DBI for HRMS data using the request sets you have generated for the People Management dashboards. See: Populating the DBI Base Summary Tables, page 3-72

Enabling the Payroll Events Model

To maintain summary data efficiently, DBI requires some method of detecting changes made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) can limit data refreshes to new or changed records in Oracle Human Resources since the last refresh.

Complete the following procedures to enable the Payroll Events Model:

1. Enable Dynamic Triggers

Ensure that the triggers that update the summary data structures are uploaded and compiled. These triggers may not be enabled or compiled if you have installed HR in standalone mode, or if you are not using Salary Administration to maintain salaries.

Enable each of the following dynamic triggers, enable the trigger components for

each trigger, and regenerate the triggers.

Application Name	Table Name	Triggering Actions
Oracle Human Resources	PER_ASSIGNMENT_BUDGET_VALUES_F	Update, Insert, Delete
Oracle Human Resources	PER_PERIODS_OF_SERVICE	Update
Oracle Human Resources	PER_PAY_PROPOSALS	Update, Insert, Delete
Oracle Human Resources	PER_PERFORMANCE_REVIEWES	Update, Insert, Delete
Oracle Human Resources	PER_APPRAISALS	Update
Oracle Payroll	PAY_ELEMENT_ENTRIES_F	Update, Insert, Delete
Oracle Human Resources	PER_PERIODS_OF_PLACEMENT	Update
Oracle Human Resources	PER_PERSON_TYPE_USAGES_F	Insert, Delete, Update
Oracle Human Resources	PER_ALL_ASSIGNMENTS_F	Insert, Delete, Update
Oracle Human Resources	PER_ABSENCE_ATTENDANCES	Insert, Delete, Update

Use the Dynamic Trigger Generation window.

See: Defining Dynamic Triggers, *Oracle HRMS Payroll Processing Management Guide*

2. **Activate Triggers for All Business Groups**

Ensure the triggers that update your summary data structures are activated for all business groups.

Use the Functional Area Maintenance window.

See: Ensuring Triggers are Activated for all Business Groups, page 3-69

Ensuring Triggers are Activated for all Business Groups

The following triggers update summary data structures with your changed records. Ensure they are activated for all business groups.

To ensure triggers are activated for all business groups:

Use the Functional Area Maintenance window.

1. In Query Mode, enter INCIDENT REGISTER in the Functional Area Name field.
2. Run the query.
3. In the Trigger Name field, find each of the following triggers:
 - PER_PERFORMANCE_REVIEWS_ARI
 - PER_PERFORMANCE_REVIEWS_ARU
 - PER_PERFORMANCE_REVIEWS_ARD
 - PER_APPRAISALS_ARU
 - PER_ASSIGNMENTS_BUDGET_VALUES_F_ARD
 - PER_ASSIGNMENTS_BUDGET_VALUES_F_ARI
 - PER_ASSIGNMENTS_BUDGET_VALUES_F_ARU
 - PER_PAY_PROPOSALS_ARD
 - PER_PAY_PROPOSALS_ARI
 - PER_PAY_PROPOSALS_ARU
 - PAY_ELEMENT_ENTRIES_F_ARD
 - PAY_ELEMENT_ENTRIES_F_ARI
 - PAY_ELEMENT_ENTRIES_F_ARU
 - PER_PERIODS_OF_SERVICE_ARU
 - PER_PERIODS_OF_PLACEMENT_ARU
 - PER_PERSON_TYPE_USAGES_F_ARI
 - PER_PERSON_TYPE_USAGES_F_ARD

- PER_PERSON_TYPE_USAGES_F_ARU
 - PER_ALL_ASSIGNMENTS_F_ARD
 - PER_ALL_ASSIGNMENTS_F_ARI
 - PER_ALL_ASSIGNMENTS_F_ARU
 - PER_ABSENCE_ATTENDANCES_ARD
 - PER_ABSENCE_ATTENDANCES_ARI
 - PER_ABSENCE_ATTENDANCES_ARU
4. For each trigger, click the Business Group tab. Ensure there is an entry for <All Business Groups>.

Running the Diagnostics Setup Reports

You can run diagnostics reports to ensure both your HRMS system, and your data, are set up correctly for DBI for HRMS reporting. The reports also provide information on the impact of your current settings. Typically, you schedule these reports to run regularly to check your system and data setup.

For report descriptions, see: DBI for HRMS Diagnostics Reports, page 1-47

To run the Diagnostics System Setup Report:

1. Use your DBI Administrator responsibility to navigate to the Submit Requests window.
2. Find the HRMSI(DBI) Diagnostics System Setup Report.
3. Schedule the report as necessary.
4. Submit the report.
5. In the Requests window, view the log.

To run the Diagnostics Data Setup Report:

1. Use your DBI Administrator responsibility to navigate to the Submit Requests window.
2. Find the HRMSI(DBI) Diagnostics Data Setup Report.
3. Enter the Start and End dates of the reporting period.

4. Select Count or Detail Mode.
5. If you select Detail Mode, select the Section you want to report on, and optionally select a Sub-section.
6. Schedule the report as necessary.
7. Submit the report.
8. In the Requests window, view the log.

Populating the Time Dimension

Use the Update Time Dimension concurrent program to populate the time dimension. The time dimension supports the trend reports within DBI for HRMS.

The Update Time Dimension concurrent program populates the time dimension with time elements, depending on the calendar type you selected in the Enterprise Calendar global parameter.

Typically you update the time dimension so that data is available one to two years prior to the Global Start Date.

For information on the Enterprise Calendar global parameter, and the Global Start Date, see *Oracle Daily Business Intelligence Implementation Guide*.

Important: The time dimension is used by all Daily Business Intelligence pages and reports, so check with your functional and technical implementation experts before updating the time dimension.

This concurrent program is currently not in the full or incremental request sets for DBI for HRMS. It will be included in the request sets in future releases. This concurrent program may be included in request sets for other DBI areas.

Use the Submit Requests window.

To populate the Time dimension:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select Update Time Dimension.
3. At implementation, use the following parameter values:

Parameter	Value at Implementation
From Date	This earliest date that you want to report on in DBI. This date defaults to the Global Start Date, but can be any date for which there are open periods in the Enterprise Calendar.
To Date	This is the latest date that you want to report on in DBI. This date defaults to the last open period defined in the Enterprise Calendar.

4. Submit your request.

After implementation, run this program in incremental mode from the last collection date to the end of the enterprise calendar.

Populating the DBI for HRMS Base Summary Tables

Run the sets of concurrent programs to load and refresh the data for DBI for HRMS dashboards.

Running the HR Management Initial and Incremental Request Sets

To populate the DBI for HRMS base summary tables with all your data for People Management dashboards, run the initial request set for HR Management. This request set purges the base tables and repopulates them.

To maintain DBI for HRMS after implementation is complete, you must run the incremental request set for HR Management at regular intervals. Typically, you schedule the incremental request set to run periodically to update the base summary tables. If you want the data in the People Management dashboards to be accurate on a daily basis, you need to schedule the incremental request set to run daily. The incremental refresh request set does not purge the underlying tables. It collects data from the last collection date.

To successfully run the incremental request set, you need to activate dynamic triggers. See: *Enabling the Payroll Events Model*, page 3-67

For instructions on creating and running DBI request sets, see: *Post-Setup Steps in Oracle Daily Business Intelligence Implementation Guide*

Running the Workforce Budget Management Initial Request Set

To populate the DBI for HRMS base summary tables with all your data for the Workforce Budget Management dashboard, run the initial request set for Workforce Budget Management. This request set purges the base tables and repopulates them. The request set resets the default values for each concurrent program after the initial load

and performs the subsequent full loads. There is no incremental set for the Workforce Budget Management dashboard.

Running the HRI DBI Benefits Initial and Incremental Load Request Set

To populate the DBI for HRMS base summary tables with all your data for the Open Enrollment Management dashboard, run the HRI DBI Benefits Initial and Incremental Load request set with Full Refresh parameters set to Yes. If you want to collect data for previous open enrollments when you run the full refresh, ensure that you set the Collect for Current Open Enrollment profile option to No. To collect data for current open enrollment data, set the profile option value to Yes. This request set purges the base tables and repopulates them in full refresh mode, when the Collect for Open Enrollment profile option value is set to No.

After the initial run, the request set automatically sets the Full Refresh parameters to No. The request set in incremental mode collects data from the last collection date.

Running the Employee Absence Management Initial and Incremental Request Sets

To load the DBI for HRMS base summary tables with all your data for the Employee Absence Management dashboard, run the initial request set for Employee Absence Management.

For ongoing maintenance of DBI for HRMS, you must run the incremental request set for Employee Absence Management at regular intervals. Typically, you schedule the incremental request set to run periodically to update the base summary tables. If you want the data in the Employee Absence Management dashboard to be accurate on a daily basis, you need to schedule the incremental request set to run daily. The incremental refresh request set does not purge the underlying tables. It collects data from the last collection date.

Important: You must run the HR Management request set again immediately after or before running the Employee Absence Management request set as the summary tables are shared between the two and running the Employee Absence Management request set can refresh part of the HR Management summary tables leading to redundant data.

To successfully run the incremental request set, you must set the HRI:Populate Absence Event Queue profile option to Yes and also activate dynamic triggers. See: *Enabling the Payroll Events Model*, page 3-67

For instructions on creating and running DBI request sets, see: *Post-Setup Steps in Oracle Daily Business Intelligence Implementation Guide*

Rerunning the HR Management and Employee Absence Management Initial request sets

Rerun the Initial request sets if:

- There is a change to the global start date.

- The request sets failed during the first time. Run the sets from the stage they failed or from the start.
- There are large number of changes or if the previous set was run long back.

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 Case

Two or more absences for the same person that you associate manually because they share a common factor, such as the same underlying cause.

Absence Type

Category 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-32

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.

Action

In AME, an Action is the *Then* part of an Approval Rule that specifies how the application must progress a transaction's approval process in a particular way depending on the conditions met.

See: Approval Rule., page Glossary-5

Action Type

In AME, an action type is the generic container for specific actions. It enables you to specify the action to take if a transaction meets the condition of an approval rule. The action type, thus, generates the appropriate approvers for a transaction. As an AME administrator you can make particular action types available for specified transaction types. See: Transaction Types., page Glossary-41

Active Employee

DBI for HRMS counts an employee, page Glossary-17 as active if they have a current period of service, page Glossary-13 at the effective date, page Glossary-16

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-11 as active if they have a current period of placement , page Glossary-13 at the effective date, page Glossary-16.

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*.

AME

Oracle Approvals Management Engine. A highly extensible approvals rules engine that enables organizations implementing Oracle Applications to simply and effectively define business rules that determine who must approve a transaction originating within an application. You can devise simple or complex rules, as your organization requires, which then form part of your overall business flow. A central repository holds all the rules to facilitate management and sharing between business processes.

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-5.

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.

Approval Rule

In AME, a business rule that determines a transaction's approval process. You construct rules using *conditions* and *actions*. For example, you can write a business rule with the conditions that if the total cost of a transaction is less than 1000 USD, and the transaction is for travel expenses, then the action must be to obtain approval from the immediate supervisor of the person triggering the transaction.

See also Conditions, page Glossary-11, Actions, page Glossary-2.

Approver Groups

In AME, an approver group is a collection of approvers you define, which you can include as part of actions when you set up your approval rules.

Arrestment

Scottish court order made out for unpaid debts or maintenance payments.

See also: *Court Order* , page Glossary-12

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-4.

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-33

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.

Attribute

In AME, attributes are the business facts of a transaction, such as the total amount of a transaction, percentage of a discount, an item's category, or a person's salary and so on. These business variables form part of the conditions of an approval rule, and determine how the transaction must progress for approvals.

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-31

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 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-16

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-34, *Field*, page Glossary-18

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 Group 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.

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-11

Cafeteria Benefits Plan

See: *Flexible Benefits Program*, page Glossary-18

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-35

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-16

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-41

Competency Assessment Template

The entity that configures the Competencies section of an appraisal.

See also: *Objective Assessment Template*, page Glossary-26

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-10, *Core Competencies*, page Glossary-12

Competency Type

A group of related competencies.

Condition

In AME, a Condition is the *If* part of an Approval Rule that specifies the conditions a transaction must meet to trigger an approval action. A condition consists of an attribute, which is a business variable, and a set of attribute values that you can define. When a transaction meets the specified attribute values, then the application triggers the appropriate action.

See: Approval Rule., page Glossary-5

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-10

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-5

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-30 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

Effective Date	Place Date	End Placement Date	Current Period of Placement?
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-14, *Effective Date*, page Glossary-16

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-16

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

The temporary or permanent employment of an employee in a business group.

See also: *Secondment*, page Glossary-37

Deployment Factors

See: *Work Choices*, page Glossary-43

Deployment Proposal

The entity that controls the permanent transfer or temporary secondment of an employee from a source business group to a destination business group. The HR Professional in the destination business group creates the deployment proposal using the Global Deployments function.

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-22

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-18

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-14

EIT

See: *Extra Information Type*, page Glossary-18

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-34, *Nonrecurring Elements*, page Glossary-26

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-38

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-15

Field

A view or entry area in a window where you enter, view, update, or delete information.

See also: *Block*, page Glossary-7, *Region*, page Glossary-34

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-7, *Region*, page Glossary-34, *Field*, page Glossary-18

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-28

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-20

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-2

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.

Integrating Application

In AME, an application that uses Oracle Approvals Management Engine to manage the approval processes of its transactions.

See: Oracle Approvals Management Engine (AME), page Glossary-3

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-15

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-34

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-10

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-20

Pay Value

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

See also: *Input Values*, page Glossary-21

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-11

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-28

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-10

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-38

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-6

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.

Rate By Criteria

A function that enables the calculation of pay from different rates for each role a worker performs in a time period.

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-26, *Standard Link*, page Glossary-38

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-11

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-7, *Field*, page Glossary-18

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-35

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-9

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-37, *User Profile Options*, page Glossary-42, *Request Groups*, page Glossary-35, *Security Groups*, page Glossary-35

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.

Secondment

The temporary transfer of an employee to a different business group.

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-35, *Security Profile*, page Glossary-37, *User Profile Options*, page Glossary-42

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-35

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-40

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-39

Social Insurance Number (SIN)

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the

following format (###-###-###).

Source Deductions Return (TP 1015.3)

A Ministère du Revenu du Québec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

SSHR

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP

See: *Statutory Sick Pay*, page Glossary-39

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-16, *Recurring Elements*, page Glossary-34

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

A Ministère du Revenu du Québec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

Statement of Remuneration and Expenses (TD1X)

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

Statutory Maternity Pay

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Statutory Sick Pay

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

Student Employee

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

Succession Planning

An SSHR function which enables a manager to prepare a succession plan.

Suitability Matching

An SSHR function which enables a manager to compare and rank a persons competencies.

Superannuation Guarantee

An Australian system whereby employers are required to contribute a percentage of an eligible employee's earnings to a superannuation fund to provide for their retirement.

Supplier

An internal or external organization providing contingent workers for an organization. Typically suppliers are employment or recruitment agencies.

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.

Total Compensation Statement

A module to communicate compensations, rewards, and benefits to employees and contingent workers.

Transaction Type

In AME, an integrating application may divide its transactions into several categories, where each category requires a distinct set of approval rules. Each set of rules is a transaction type. Different transaction types can use the same attribute name to represent values that the application fetches from different places. This enables several transaction types to share approval rules, thus facilitating a uniform approval policy across multiple transaction types.

Transcendentive

A third-party compensation management solutions provider, that provides additional information about benefits choices.

Unit Standard

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

Unit Standard 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-6

User Profile Options

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-35, *Security Profile*, page Glossary-37

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-17 or a contingent worker, page Glossary-11

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, 1-29
- age bands
 - configure, 3-29
 - predefined, 3-27
- alerts, 1-8
- analytics
 - business areas, 1-11
 - Discoverer workbooks, 1-3
 - overview, 1-11
 - templates, 1-11
- Area View By, 1-40

B

- BIS_OT_BAND formulas, 3-15
- BIS_REG_HOURS formula, 3-15
- buckets
 - Length of Work Banding, 3-58
 - Performance Banding, 3-59, 3-63
 - Period of Placement, 3-59

C

- calculations
 - DBI, 1-17
- Change column, 1-30
- columns
 - Change, 1-30
- Compare To parameter, 1-30
- concurrent programs, 3-55
 - HRI Load All Benefits Compensation Objects And Enrollment Periods, 3-42

- HRI Load All Benefits Eligibility And Election Events, 3-43
- HRI Load All Benefits Enrollment Actions, 3-43
- HRI Load All Budgets, 3-40
- HRI Load All Competence Level Hierarchy, 3-2, 3-18
- HRI Load All Competence Requirement Fact, 3-3, 3-19
- HRI Load All Geography Category Structures, 3-4, 3-21
- HRI Load All Headcount Budgets By Organization Manager Hierarchy, 3-41
- HRI Load All Job Hierarchies, 3-56
- HRI Load All Labor Cost Actuals (Payroll Costing), 3-39
- HRI Load All Labor Cost Budgets By Organization Manager Hierarchy, 3-41
- HRI Load All Labor Cost Commitments, 3-39
- HRI Load All Organization Manager Hierarchies, 3-40
- HRI Load Separation Reasons Table, 3-5, 3-50, 3-52
- HRI Load Summarized Assignment Events by Organization Manager Hierarchy, 3-42
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments, 3-40
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By Organization Manager Hierarchy, 3-40
- Update Gregorian Hierarchy in the Time Dimension, 3-4, 3-20
- Update Time Dimension, 3-71

- Country parameter, 1-31
- Country view by, 1-40
- Currency parameter, 1-32

D

- Daily Business Intelligence, 1-14
 - for HRMS, 1-14
- Daily HR Intelligence role, 1-16
- data collection, 3-2
- data warehouse, 1-13
- Data Warehouse Module
 - collection programs, 3-23
 - Discoverer workbooks, 1-3
 - See also* workbooks, EDW
 - example configuration script, 2-30
 - facts and dimensions
 - populate, 3-35
 - implement, 2-10
 - implementation flowchart, 2-3
 - load programs, 3-24
 - populate, 3-23
 - predefined data, 3-27
 - standard configuration, 3-25
- DBI
 - HR Management page, 1-4
- DBI calculations, 1-17
- DBI for HRMS
 - data security, 1-16
- DBI for HRMS base summary tables
 - request sets, 3-72
- DBI for HRMS troubleshooting, 1-42
- DBI parameters, 1-28
 - manager, 1-16
- DBI responsibilities
 - HR Line Manager, Daily HR Intelligence,
 - Chief HR Officer, Workforce Budget Manager,
 - Benefits Manager, 1-15
- DBI users, 2-14, 2-21
- diagnostics
 - data, 1-47
- Diagnostics Data Setup report, 3-70
- Diagnostics System Setup report, 3-70
- dimension
 - setting up area geography dimension, 3-64
- Discoverer
 - end user layer, 1-2, 1-11

- User Edition, 3-18
 - workbooks, 1-2
- Discoverer Analytics
 - implementation flowchart, 2-2
- Discoverer workbooks
 - implement, 2-7

E

- Effective Date parameter, 1-32
- Embedded Data Warehouse, 1-3
- Employee Absence Management
 - implementation flowchart, 2-7
- Employee Absence Management Dashboard
 - implement, 2-26, 2-26
- Employee Absence Management Initial request set, 3-38
- Employee Hours Worked Trend Analytics
 - workbook
 - display overtime bands, 3-18
- Enterprise Calendar, 3-71
- events
 - excluded, 1-42
- EXAMPLE_BIS_OT_BAND1 formula, 3-16

F

- flexfields
 - descriptive
 - Location, 3-9
 - key, descriptive
 - Job, 3-53
- formulas
 - BIS_OT_BAND, 3-15
 - BIS_REG_HOURS, 3-15
 - compile, 2-16, 2-23, 2-28
 - EXAMPLE_BIS_OT_BAND1, 3-16
 - HR_MOVE_TYPE_TEMPLATE, 3-49, 3-50
 - HRI_GENERATE_FAST_FORMULA, 3-62
 - HRI_MAP_JOB_JOB_ROLE, 3-56
 - HRI_MAP_WORKER_TYPE, 3-65
 - NORMALIZE_APPRAISAL_RATING, 3-62, 3-63
 - NORMALIZE_REVIEW_RATING, 3-61, 3-63
 - TEMPLATE_BIS_TRAINING_CONVERT_DURATION, 3-11, 3-12, 3-13

G

geography dimension
 define, 3-8, 3-8, 3-9, 3-9, 3-10
 populate, 3-4, 3-21
 set up, 3-7
Global Start Date, 3-71

H

hierarchies
 competence level
 populate, 3-2, 3-18
 job
 check database setup, 3-56
 check hierarchy setup, 3-55, 3-56
 Job Families, 3-52
 Job Functions, 3-52
 set up, 3-52
 structure, 3-54, 3-55
 Job, 1-33
 Manager, 1-35
 supervisor, 1-16
 Time, 1-38
HR_MOVE_TYPE_TEMPLATE formula, 3-49, 3-50
HR: BIS Job Hierarchy – Job Grouping Level 1 system profile, 3-55
HR: BIS Job Hierarchy – Job Grouping Level 2 system profile, 3-55
HRI_GENERATE_FAST_FORMULA formula, 3-62
HRI_MAP_JOB_JOB_ROLE formula, 3-56
HRI_MAP_WORKER_TYPE formula, 3-65
HRI:Absence Duration Units system profile, 3-48
HRI: Collect Manager Snapshots system profile, 3-46
HRI:Collect Open Enrollment in Progress system profile, 3-47
HRI:DBI Chief HR Officer Named User system profile, 3-47
HRI:DBI Force Foundation HR Processes system profile, 3-45
HRI:DBI Link To Transaction System system profile, 3-47
HRI:Enable Benefits Collections and Event Queue system profile, 3-47

HRI:Enable Captured Events Archive system profile, 3-45
HRI:Enable Detailed Logging profile option, 3-46
HRI: Manager Snapshot Threshold system profile, 3-46
HRI:Multithreading Chunk Size profile option, 3-48
HRI:Number of Threads to Launch profile option, 3-48
HRI:Period of Service / Placement Date Start Source system profile, 3-46
HRI:Populate Absence Events Queue system profile, 3-48
HRI:Populate Assignment Events Queue system profile, 3-45
HRI:Populate Supervisor Hierarchy Events Queue system profile, 3-45
HRI:Populate Supervisor Status History Events Queue system profile, 3-45
HRI: Workforce in Period Calculation Method system profile, 3-44
HRI Load All Benefits Compensation Objects And Enrollment Periods concurrent program, 3-42
HRI Load All Benefits Eligibility And Election Events concurrent program, 3-43
HRI Load All Benefits Enrollment Actions, 3-43
HRI Load All Budgets concurrent program, 3-40
HRI Load All Competence Level Hierarchy concurrent program, 3-2, 3-18
HRI Load All Competence Requirement Fact concurrent program, 3-3, 3-19
HRI Load All Geography Category Structures concurrent program, 3-4, 3-21
HRI Load All Headcount Budgets By Organization Manager Hierarchy concurrent program, 3-41
HRI Load All Job Hierarchies concurrent program, 3-56
HRI Load All Labor Cost Actuals (Payroll Costing) concurrent program, 3-39
HRI Load All Labor Cost Budgets By Organization Manager Hierarchy concurrent program, 3-41
HRI Load All Labor Cost Commitments concurrent program, 3-39
HRI Load All Organization Manager Hierarchies

- concurrent program, 3-40
- HRI Load Separation Reasons Table concurrent program, 3-5, 3-50, 3-52
- HRI Load Summarized Assignment Events by Organization Manager Hierarchy concurrent program, 3-42
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments By Organization Manager Hierarchy concurrent program, 3-40
- HRI Load Summarized Labor Cost Actuals with Labor Cost Commitments concurrent program, 3-40
- HR Management, Chief HR Officer, and Contingent Worker Management dashboards
 - enable, 2-14
- HR Management Incremental request set, 3-53, 3-55
- HR Management Initial and Incremental request set, 3-37
- HR Management Initial request set, 3-53, 3-55
- HRMSi (DBI) Diagnostics Data Setup report, 1-47
- HRMSi reports
 - concurrent programs, 3-2

I

- implementation checklist, 2-1
- implementation flowcharts, 2-2

J

- job category sets
 - configure, 3-31
 - description, 3-28
 - predefined, 3-28
- job competence requirements
 - collect, 3-3, 3-19
- Job Family parameter, 1-32
- Job Family view by, 1-41
- Job Function parameter, 1-33
- Job Function view by, 1-40
- Job hierarchy, 1-33

K

- Key Performance Indicators, 1-3, 1-7
 - See also* KPIs
 - implement, 2-10

- implementation flowchart, 2-3

KPIs

- list of, 1-7
- targets, 1-9

L

- Leaving Reason parameter, 1-34
- Leaving Reason view by, 1-41
- Length of Placement Band parameter, 1-34
- Length of Service Band parameter, 1-34
- Length of Service Band view by, 1-41
- Length of Work Banding bucket, 3-58

M

- Manager hierarchy, 1-35
- Manager parameter, 1-35
- Manager view by, 1-41

N

- non-DBI for HRMS customers, 1-49
- NORMALIZE_APPRAISAL_RATING formula, 3-62, 3-63
- NORMALIZE_REVIEW_RATING formula, 3-61, 3-63

O

- Open Enrollment Management
 - implementation flowchart, 2-6
- Open Enrollment Management Dashboard
 - implement, 2-24, 2-25
- Oracle Learning Management, 3-11
- Organization manager, 2-23
- overtime bands
 - display, 3-18
- overtime hours
 - calculate, 3-15
 - (U.S.), 3-16

P

- parameters
 - Absence Category, 1-29
 - Compare To, 1-30
 - Country, 1-31
 - Currency, 1-32
 - DBI, 1-28

- Effective Date, 1-32
- Job Family, 1-32
- Job Function, 1-33
- Leaving Reason, 1-34
- Length of Placement Band, 1-34
- Length of Service Band, 1-34
- Manager, 1-35
- Performance Band, 1-36
- Period, 1-36
- Termination Category, 1-39
- View By, 1-40
- Parameters
 - program, 1-38
 - Staff, 1-39
- Payroll Events Model, 3-67
 - activate triggers, 3-69
- People Management dashboards
 - implement, 2-14
- People Management Dashboards
 - implementation flowchart, 2-4
- Performance Banding bucket, 3-59, 3-63
- Performance Band parameter, 1-36
- Performance Band view by, 1-41
- Performance Management Framework, 1-3, 1-7
- Performance Management Viewer
 - reports, 1-8
- Performance Management Viewer reports, 1-3
 - See also* PMV reports
- Period of Placement Banding bucket, 3-59
- period of work bands
 - configure, 3-30
 - predefined, 3-27
- Period parameter, 1-36
- person types
 - Data Warehouse Module
 - configure, 3-33
- profile options
 - HRI:Multithreading Chunk Size, 3-48
 - HRI:Number of Threads to Launch, 3-48
- Program parameter, 1-38
- Programs
 - populating DBI base summary tables, 3-37

R

- reports
 - Diagnostics Data Setup, 3-70

- Diagnostics System Setup, 3-70
- HRMSi (DBI) Diagnostics Data Setup, 1-47
- request sets
 - Employee Absence Management Initial, 3-38
 - HR Management Incremental, 3-53, 3-55
 - HR Management Initial, 3-53, 3-55
 - HR Management Initial and Incremental, 3-37
- responsibilities
 - Data Warehouse Module, 1-13
 - DBI, 1-15
 - HRMSi, 1-6
- role
 - Daily HR Intelligence, 1-16
 - Workforce Budget Manager, 1-16

S

- separation categories
 - define, 3-49
- separation reasons
 - categorize, 3-50
 - collect, 3-5
 - load, 3-52
- Setting up Area Geography dimension, 3-64
- SQL*Plus, 2-30
- Staff parameter, 1-39
- system profiles
 - HR: BIS Job Hierarchy – Job Grouping Level 1, 3-55
 - HR: BIS Job Hierarchy – Job Grouping Level 2, 3-55
 - HRI:Absence Duration Units, 3-48
 - HRI: Collect Manager Snapshots, 3-46
 - HRI:Collect Open Enrollment in Progress, 3-47
 - HRI:DBI Chief HR Officer Named User, 3-46
 - HRI:DBI Force Foundation HR Processes, 3-45
 - HRI:DBI Link To Transaction System, 3-47
 - HRI:Enable Benefits Collections and Event Queue, 3-47
 - HRI:Enable Captured Events Archive, 3-45
 - HRI:Enable Detailed Logging, 3-46
 - HRI: Manager Snapshot Threshold , 3-46
 - HRI:Period of Service / Placement Date Start Source, 3-47
 - HRI: Populate Absence Events Queue, 3-48
 - HRI:Populate Assignment Events Queue, 3-45
 - HRI:Populate Supervisor Hierarchy Events

Queue, 3-45
HRI:Populate Supervisor Status History
Events Queue, 3-45
HRMS: HRI: Workforce in Period Calculation
Method, 3-44
Workforce Measurement Type, 3-44

T

TEMPLATE_BIS_TRAINING_CONVERT_
DURATION formula, 3-11, 3-12, 3-13
Termination Category parameter, 1-39
Termination Category view by, 1-41
time dimensions
 Analytics
 populate, 3-4, 3-20
 DBI for HRMS
 populate, 3-71
Time hierarchy, 1-38
Time view by, 1-41
training hours
 amend, 3-12
 configure, 3-11
training time periods
 add, 3-13
troubleshooting, 1-42

U

Update Gregorian Hierarchy in the Time
Dimension concurrent program, 3-4, 3-20
Update Time Dimension concurrent program, 3-
71

V

View By parameter, 1-40
view bys
 Area, 1-40
 Country, 1-40
 Job Family, 1-41
 Job Function, 1-40
 Leaving Reason, 1-41
 Length of Service Band, 1-41
 Manager, 1-41
 Performance Band, 1-41
 Termination Category, 1-41
 Time, 1-41

W

workforce, 1-7
Workforce Budget Management
 implementation flowchart, 2-5
Workforce Budget Management Dashboard
 enable, 2-21
 implement, 2-21
Workforce Budget Manager role, 1-16
Workforce Measurement Type system profile, 3-
44
working hours
 calculate, 3-15
 configure, 3-14
 database items, 3-17