Oracle® Human Resources Management Systems
Strategic Reporting (HRMSi) User Guide
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Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide, Release 12.2

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide.*

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

- The principles and customary practices of your business area

- Oracle Human Resources Management Systems (HRMS)

  Oracle HRMS is a major component of the Oracle E-Business Suite of applications. If you are unfamiliar with Oracle HRMS, then Oracle suggests that you attend one or more of the Oracle HRMS training classes available through Oracle University.

- The Oracle Applications graphical user interface

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

See Related Information Sources on page xii for more Oracle E-Business Suite product information.

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HRMS Glossary

Related Information Sources

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, it is advised that you reference other user guides and implementation guides when you set up and use Oracle HRMS.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Oracle Application Framework Personalization Guide

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite Flexfields Guide

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

Guides Related to This Product

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide

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

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 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 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 Performance Management Implementation and User Guide

Learn how to set up and use performance management functions. This includes setting objectives, defining performance management plans, managing appraisals, and administering questionnaires.

Oracle Succession Planning Implementation and User Guide

Learn how to set up and use Succession Planning functions. This includes identifying succession-planning requirements, using talent profile, organization chart, suitability analyzer, and performance matrices.

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 iRecruitment Implementation and User Guide

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

Oracle Learning Management Implementation Guide

Learn how to implement and configure Oracle Learning Management (OLM).

Oracle Learning Management User Guide

Use Oracle Learning Management to accomplish your online and offline learning goals.

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.

Oracle Labor Distribution User Guide

Learn how to maintain employee labor distribution schedules, distribute pay amounts, encumber (commit) labor expenses, distribute labor costs, adjust posted labor distribution, route distribution adjustment for approval, and manage error recovery processes. You also learn how to set up effort reporting for Office of Management and Budget (OMB) compliance.

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 Oracle 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 E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

1

Strategic Reporting (HRMSi) User Guide

Strategic Reporting Overview

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

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

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.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

The worksheets provide:

- Summaries of your enterprise data.

- Analyses of trends over time.

- Comparisons of workforce changes across your enterprise.

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

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

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

Discoverer Analytics Reports

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

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

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

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

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.

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.

> **Additional Information:** See also My Oracle Support Knowledge
> Document 2277369.1, *Oracle E-Business Suite Support Implications for
> Discoverer 11gR1.*

Strategic Reporting Key Concepts

Workforce

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

2

Recruiting and Hiring Intelligence

Workforce Intelligence (HRMSi) for Recruiting and Hiring

Discoverer Reports for Recruiting and Hiring

> **Additional Information:** See also My Oracle Support Knowledge
> Document 2277369.1, *Oracle E-Business Suite Support Implications for
> Discoverer 11gR1.*

Key Concepts for Recruiting and Hiring Intelligence

The following concepts enable you to accurately interpret the results of the Recruiting
and Hiring reports.

Discoverer Workbook Calculations

> **Additional Information:** See also My Oracle Support Knowledge
> Document 2277369.1, *Oracle E-Business Suite Support Implications for
> Discoverer 11gR1.*

The predefined recruiting and hiring workbooks, in addition to displaying information
set up within Oracle HRMS, calculate the following:

- **New Applicants**

  The number of applicants for the vacancy who have the status of active application.

- **Terminations**

  The number of applicants whose applicant assignment has ended, and for whom an
  employee assignment has not been created.

- **Offers**

  The number of applicants that have the status of Offer.

  > **Note:** Applicants can have only one status at any time, therefore the
  > number of offers represents offers which have been made and not
  > yet accepted; it does not include offers which have subsequently
  > been accepted.

- **Accepts**

  The number of applicants that have the status of Accept.

- Hired

  The number of applicant assignments that have been converted to employee assignments, regardless of whether the applicant already works for your enterprise.

- **Still Employed**

  The number of applicant assignments that have been converted to employee assignments that are currently active.

- **Applicant Age**

  The current age of the applicant, not their age when they applied for the vacancy.

  > **Note:** Applicants must have a birth date set up to be included in the worksheet. You cannot enter a date of birth on the Applicant Quick Entry window, so you must use the People window to set this up.

- **Days to Fill Vacancy**

  The number of days from opening the vacancy until an applicant is hired.

Applicant Time to Start Comparison Workbook

This workbook analyses the days required to fill vacancies within a recruitment activity. It only reports on job applicants that have been hired.

Business Questions

How efficient is my recruitment process?

Worksheets

The workbook contains the following worksheets:

- By Ethnic Group (United States specific)

- By Ethnic Origin (United Kingdom specific)

- By Gender

- By Job

- By Grade

- By Organization

- By Location

- By Vacancy

Workbook Parameters

This workbook does not use parameters.

Workbook Headings and calculations

The workbook uses the following calculation:

Average Days to Fill Vacancy

This calculation provides the Average Days from Vacancy Start to Hire; it is based on the average interval in days between the date that the vacancy started and the date the employee was hired (excluding the vacancy start date and the employee hire date).

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 2-2

Application Termination Analysis Workbook

This workbook investigates the reasons your enterprise has terminated applications for different vacancies and individual applicants. The workbook only includes terminated applications.

Business Questions

Why are applicants dropping out of the recruitment process?

Worksheets

This workbook contains the following worksheets:

- Termination Details

- Termination Reasons by Vacancy

Workbook Parameters

This workbook does not use parameters.

Workbook Headings and calculations

The workbook does not use any calculations.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 2-2

Applications Analysis Workbook

This workbook investigates the applications for vacancies within your enterprise.

You can investigate the following by vacancy, recruitment, and applicant status:

- Number of openings for a vacancy

- New applicants

- Applications which have been terminated

- Offers to applicants

- Accepted offers

- Number of applicants hired

Parameters

The workbook does not use parameters.

Worksheets

This workbook has the following worksheets:

- Age Analysis, page 2-5

- Applicant Status, page 2-6

- Recruitment Activity Summary, page 2-6

- Vacancy Summary, page 2-6

Age Analysis Worksheet

This worksheet enables you to investigate the current age of applicants for a particular vacancy.

Business Questions

What is the age spread of my applicants?

Worksheet headings and calculations

This worksheet does not use calculations.

Applicant Status Worksheet

This worksheet enables you to investigate the applications that exist for a Business Group, requisition, and recruiter.

Business Questions

What is the status of my applicants?

Worksheet headings and calculations

This worksheet does not use calculations.

Recruitment Activity Summary Worksheet

This worksheet enables you to investigate recruitment activities within your Business Group. You can analyze the current status of recruitment activities, for example, the number of new applicants, the number of offers made, and the number of terminated applicants. You can view recruitment activity information for a Business Group, requisition, vacancy, and recruitment type.

Business Questions

How many applicants are there at each recruitment stage?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires**

  Populates the Hires column in the worksheet with the number of applicants that have been hired into the vacancy from the recruitment activity.

Vacancy Summary Worksheet

This worksheet enables you to investigate vacancies within your Business Group. You can analyze the current status of vacancies, for example, the number of remaining applicants, the number of new applicants, and the number of terminated applicants. You can view vacancy information for a Business Group, recruitment type, and

recruitment activity.

Business Questions

How many applicants are there at each recruitment stage?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires**

  Populates the Hires column in the worksheet with the number of applicants that have been hired into the vacancy from the recruitment activity.

- **Planned Cost with Currency**

  Populates the Planned Cost with Currency page item in the worksheet. It is a concatenation of planned cost and currency code.

- **Actual Cost with Currency**

  Populates the Actual Cost with Currency page item in the worksheet. It is a concatenation of actual cost and currency code.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 2-2

Recruitment Efficiency Analysis Workbook

This workbook analyses vacancy ratios, vacancy ratios by recruitment activity, recruitment activity ratios, and hires versus openings summary for recruitment within your enterprise.

Parameters

The workbook does not use parameters.

Worksheets

This workbook has the following worksheets:

- Vacancy Ratios, page 2-8

- Vacancy Ratios by Recruitment Activity, page 2-8

- Recruitment Activity Ratios, page 2-9

- Hires versus Openings Summary, page 2-9

Vacancy Ratios Worksheet

Business Questions

How successful is my recruitment?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Hires/Offers**

  Populates the Hires / Offers column with the percentage of hires who are employed as of the system date, against the number of open offers as of the system date.

- **Vacancy/Offers**

  Populates the Hires / Openings column with the percentage of vacancy hires, against the number of openings.

- **Hires/Openings**

  Populates the Hires / Openings column with the percentage of hires who are employed as of the system date, against the number of initial openings.

- **Vacancy Hires**

  Populates the Hires column with the number of applicants who have been made an offer for a vacancy.

Vacancy Ratios by Recruitment Activity Worksheet

Business Questions

How many applicants are there at each recruitment stage?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires/Openings**

  Populates the Hires / Openings column with the percentage of recruitment activity hires, against the number of openings.

- **Recruitment Activity Vacancy Offers/Recruitment Activity Vacancy Hires**

  Populates the Hires / Opening column with the percentage of hires, against the

number of offers made.

- **Recruitment Activity Vacancy Hires**Populates the Hires column with the number of applicants that have been hired into the vacancy from the recruitment activity.

- **Recruitment Activity Vacancy Offers**Populates the Offers column with the number of applicants that have been made offers via the recruitment activity.

- **Cost per Hire**

  Populates the Cost per Hire column with the actual cost of recruitment activity divided by the number of successful recruitments using that activity.

Recruitment Activity Ratios Worksheet

Business Questions

How successful is my recruitment?

How much does my recruitment cost?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Hires/Recruitment Activity Offers**

  Populates the Hires / Opening column with the percentage of hires, against the number of offers made.

- **Recruitment Activity Offers**Populates the Offers column with the number of offers made from a recruitment activity.

- **Cost per Hire**

  Populates the Cost per Hire column with the actual cost of recruitment activity divided by the number of successful recruitments using that activity.

- **Recruitment Activity Hires**Populates the Recruitment Activity Hires column with the number of hires a recruitment activity has achieved.

Hires versus Openings Summary Worksheet

Business Questions

How successful is my recruitment?

Worksheet headings and calculations

This worksheet uses the following calculations:

- **Recruitment Activity Vacancy Hires/Openings**

  Populates the Hires / Offers column with the percentage of recruitment activity hires, against the number of openings.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 2-2

Vacancy Hire Success (Organization Hierarchy) Status Analytics workbook

The Vacancy Hire Success (Organization Hierarchy) Status Analytics workbook provides a status analysis comparing the changes in vacancy success across organizations in your enterprise, or across geographical areas. You can analyze the:

- Total number of openings recorded for vacancies.

- Total number of openings that have been filled.

This workbook also enables you to view the success of your recruitment activities.

The workbook calculates the total number of vacancy openings and the number of filled vacancies in a particular time period, to produce a vacancy success rate. Vacancy success is defined as the percentage of vacancy openings that are filled.

The workbook only includes vacancies that have a status of Closed and have an End Date within the selected time period.

The workbook only includes assignments that match the criteria selected in the workbook parameters. For example, an assignment must have the same budget measurement value as the worksheet parameter.

Business Questions

How many vacancies have there been in my enterprise within a specific geographical area?

How many of these vacancies have been filled? How does this compare with other geographical areas?

Parameters

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

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Area (Geography)

- Country (Geography)

- Region (Geography)

- Location (Geography)

- Job Category

- Job Name

- Grade Name

- Position Name

Worksheets

This workbook has the following worksheets:

- By Organization

- By Geography Area

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

Headings and Calculations

All worksheets contain the following columns:

- **A grouping column**

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

- **Openings**

The number of openings for each group.

- **Employee Starts**

    The number of employee starts for each group. The worksheets calculate the Employee Starts total by totaling the employee assignments created to fill the vacancies.

- **Success Rate Percent**

    Displays the total workforce starts as a percentage of total workforce openings.

The worksheets count employee assignments using Workforce, enabling you to define the employee value of each assignment. See: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 2-2

Vacancy Hire Success (Organization Hierarchy) Trend Analytics Workbook

The Vacancy Hire Success (Organization Hierarchy) Trend Analytics workbook provides a trend analysis showing the changes in vacancy success over a selected period of time. You can analyze the:

- Total number of openings recorded for vacancies.

- Total number of openings that have been filled.

This workbook also enables you to view the success of your recruitment activities.

The workbook calculates the total number of vacancy openings and the number of filled vacancies in a particular time period, to produce a vacancy success rate. Vacancy success is defined as the percentage of vacancy openings that are filled.

The workbook only includes vacancies that have a status of Closed and have an End Date within the selected time period.

The workbook only includes assignment that match the criteria selected in the workbook parameters. For example, an assignment must have the same budget measurement value as the worksheet parameter.

Business Questions

How many vacancies have there been in my enterprise over, for example, the last quarter?

How many of these vacancies have been filled? How does this compare with the previous quarter?

Parameters

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

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Area (Geography)

- Country (Geography)

- Region (Geography)

- Location (Geography)

- Job Category

- Job Name

- Grade Name

- Position Name

Worksheets

This workbook has the following worksheets:

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

The worksheets display one row for each time period. For example, the by Month

worksheet displays one row per month.

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **A time period column**

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

- **Openings**

  The number of openings within the time period.

- **Employee Starts**

  The number of employee starts within the time period. The worksheets calculate the Employee Starts total by totaling the employee assignments created to fill the vacancies

- **Success Rate Percent**

  Displays the total workforce starts as a percentage of total workforce openings.

The worksheets count employee assignments using Workforce, enabling you to define the employee value of each assignment. See: Workforce Calculation, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 2-2

Vacancy Hire Success (Organization Hierarchy) Template Analytics Workbook

The Vacancy Hire Success (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating vacancy success over yearly periods, the other providing a detailed analysis of vacancy success in the workforce.

These worksheets help you to create reports to analyze the success of your recruitment activities. Recruitment success is defined as the percentage of vacancy openings that are

filled.

The workbook calculates the total number of vacancy openings for each year, and how many of these have been filled.

The workbook uses the Budget Measurement Value to calculate the number of openings. The worksheet Openings column displays the number of Headcounts or Full Time Equivalents (depending on your Budget Measurement Value) represented by your vacancies.

The workbook only includes vacancies that have been closed within the selected time period.

The vacancy must also match all the selection criteria. For example, if you select an organization and a job, you must have entered an organization and job for the vacancy on the HRMS Requisition and Vacancy window.

The workbook calculates the Employee Starts total by totaling the employee assignments created to fill the vacancies. HRMS Intelligence counts employee assignments using Workforce, enabling you to define the employee value of each assignment.

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

The assignments created to fill the vacancy must match the criteria selected in the report, to appear in the Openings Filled total. For example, an assignment must have the same budget measurement value as the report parameters.

The success rate calculation is:

```
Total Workforce Measurement Value for all Employee Starts*100/Total
Workforce Measurement Value for Openings
```

Parameters

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

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

The template includes the following optional parameters:

- Area (Geography)

- Country (Geography)

- Region (Geography)

- Location (Geography)

- Job Category

- Job Name

- Grade Name

- Position Name

Worksheets

This workbook has the following worksheets:

- By Year

- By Detail

By Year Worksheet

The by Year worksheet enables you to see vacancy success for each year.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **Year**

  The time period for which this worksheet is run.

- **Openings**

  The number of openings within the time period.

- **Employee Starts**

The number of employee starts within the time period.

- **Success Rate Percent**

  Displays the vacancy success rate.

Detail Worksheet

The Detail worksheet calculates the vacancy success rates for vacancies with the same opening and closing dates, for each organization, location, job, grade, and position.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Vacancy Open Date**

  The date the vacancy opened.

- **Vacancy Close Date**

  The date the vacancy closed.

- **Openings**

  The number of openings within the vacancy open and close date, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Employee Starts**

  The number of employee starts for openings within the vacancy open and close date, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value. The worksheets calculate the Employee Starts total by totaling the employee assignments created to fill the vacancies.

- **Success Rate Percent**

  Displays the vacancy success rate. Recruitment success is a calculation of the total workforce starts as a percentage of total workforce openings.

- **Organization**

  The organization that had the vacancy.

- **Location**

  The location where the vacancy occurred.

- **Job**

  The job for which the vacancy occurred.

- **Grade**

  The grade for which the vacancy occurred.

- **Position**

  The position for which the vacancy occurred.

Related Topics

Recruiting and Hiring Discoverer Workbook calculations, page 2-2

3

People Management Intelligence

Workforce Intelligence Key Concepts for People Management

Key Concepts for People Management Intelligence

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

- Workforce Count, page 3-2

- Workforce Gains and Losses, page 3-2

- Enterprise Selection, page 3-3

- Job Categories , page 3-4

Workforce Count

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

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

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

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

Workforce Gains and Losses

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

- **Gains** are the total workforce that exists in the organization or organizations at the end of a time period, which did not exist at the beginning of the time period.

- **Losses** are the total workforce that exists in an organization or organizations at the beginning of a period, but no longer exists at the end of the period.

- **Total Workforce** is the workforce at the end of the time period.

Note: Workforce is counted using active and suspended assignments.

Enterprise Selection

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

• Rollup Organizations

• Rollup Each Organization

Rollup Organizations

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

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

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

Rollup Each Organization

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

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

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

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

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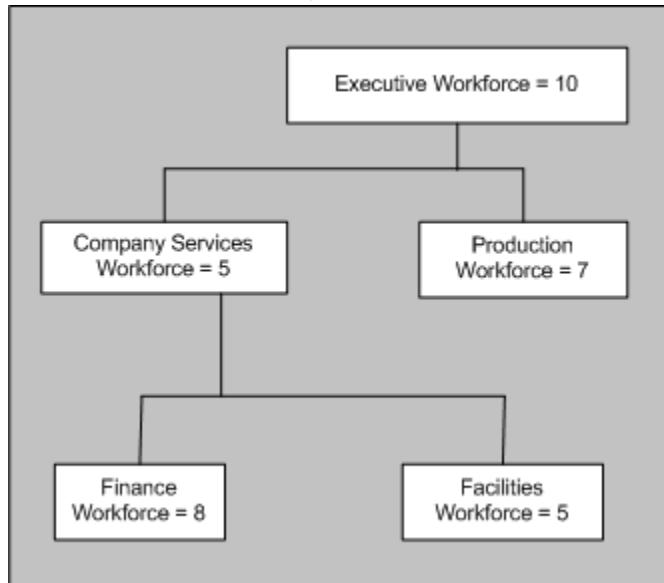
If you decide to rollup each organization, the report will display information that is calculated for that organization and all the organizations below it in the hierarchy.

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

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

Job Categories

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

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

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

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

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

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

- Be active or suspended.

- Have the job and job category selected.

- Fit the selection criteria entered.

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

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

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

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

Workforce Intelligence for People Management

Employee Anniversary and Birthday Detail Workbook

This workbook enables you to report on employee anniversaries and birthdays by organization and supervisor hierarchy.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets

* Organization Hierarchy

* Supervisor Hierarchy

Headings and Calculations

The worksheets use the following calculations:

* **Current Service Decimal**

  Calculates the employee's length of service in their latest assignment as a number of years.

* **Total Service Decimal**

  Calculates the employee's length of service since their first assignment as a number of years.

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by organization. Total and current service calculations are in respect of the system date. The workbook uses the current version of the organization hierarchy.

Business Questions

When is the anniversary date of employment of my employees in a given organization hierarchy?

When are my employees' birthdays?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employees are listed by supervisor. Total and current service calculations are in respect of the system date. The workbook uses the current version of the supervisor hierarchy.

Business Questions

When is the anniversary date of employment of my employees in a given supervisor hierarchy?

When are my employees' birthdays?

Parameters

You must specify values for the following parameters:

- Supervisor

Employee by Supervisor Status Workbook

This workbook enables you to report on the supervisor hierarchy and salary details for your employees.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Key Concepts

See the following topics to accurately interpret this workbook:

Workforce Count, page 3-2

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees, by organization.

The worksheet includes employees who have an assignment on the effective date within the selected organization hierarchy.

Business Questions

Who supervises my employees in a given organization?

How many direct reports do my employees in a given organization have and what are the total salaries of those direct reports?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Effective Date

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees by supervisor.

The worksheet includes employees who have an assignment on the effective date, and report directly to the selected supervisor.

Business Questions

Who supervises my employees?

How many direct reports do my employees have and what are the total salaries of those direct reports?

Parameters

You must specify values for the following parameters:

- Supervisor

- Effective Date

Employee Composition Analysis Workbook

The Workforce Composition Analysis workbook investigates employee composition by assignment details, salary band, and time service band.

It enables you to:

- Compare employee assignment details across organizations.

- Analyze salary information across organizations.

- Change salary groupings.

- Report on salary and time in service bands.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Workbooks

This workbook has the following worksheets:

- By Assignment Details

- By Salary Band

- By Time In Service Band

By Assignment Details Worksheet

This worksheet enables you to analyze employee assignment details by organization, job, position, or grade.

Business Questions

What is the composition of my workforce by assignment?

Parameters

This worksheet has no parameters.

By Salary Band Worksheet

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

Business Questions

What is the composition of my employees by salary band?

Parameters

This worksheet has no parameters.

By Time In Service Band Worksheet

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

Business Questions

What is the composition of my employees by service band?

Parameters

This worksheet has no parameters.

Headings and Calculations

This worksheet uses the following calculations:

- **Service Band**

  Populates the Service Band page item in the worksheet. This calculation creates the service bands.

Employee Hired or Terminated Detail Workbook

This workbook enables you to report on employees who terminated or were hired within two specified dates.

Basic employee primary assignment details are shown, including:

- Hire date

- Termination date

- Termination reason where applicable

> **Additional Information:** See also My Oracle Support Knowledge
> Document 2277369.1, *Oracle E-Business Suite Support Implications for
> Discoverer 11gR1.*

Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees who terminated or were hired
within two specified dates for a given organization and its subordinate organizations.

Business Questions

*Provide me with a list of employees who have been hired into or who have separated from a given
organization hierarchy.*

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Start Date

- End Date

Related Topics

Workforce Count, page 3-2

Employee Mailing Address Detail Workbook

This workbook enables you to report on employee current primary addresses in a non-
legislative specific address format.

This is useful for global reporting of employee addresses.

> **Additional Information:** See also My Oracle Support Knowledge
> Document 2277369.1, *Oracle E-Business Suite Support Implications for
> Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on employee current
primary addresses in a non-legislative specific address format, for a given organization
and its subordinate organizations.

Business Questions

Show me the primary addresses for all employees within a specific organization hierarchy.

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on employee current
primary addresses in a non-legislative specific address format, for a given supervisor
and their subordinates.

Business Questions

*Show me the primary address of each employee reporting directly or indirectly to a specific
supervisor.*

Parameters

You must specify values for the following parameters:

- Supervisor

Employee Organization Transfer Detail Workbook

This workbook enables you to report on employee primary assignment organization transfers during a given period. The workbook output includes the employee primary assignment details before and after the transfer, including:

- Job Name

- Organization Name

- Supervisor Name

The workbook also shows the movement type (Organization Movement within Hierarchy, Organization Movement out of Hierarchy, Organization Movement into Hierarchy) for each employee transfer.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given organization and its subordinate organizations.

The worksheet output includes the employee primary assignment details before and after the transfer, including Job Name, Organization Name, and Supervisor Name.

Business Questions

Who has transferred into or out of my organization hierarchy?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Start Date

- End Date

Supervisor Hierarchy Worksheet

This worksheet enables you to report on transfers of employee primary assignments during a given period for a given supervisor and their subordinates.

The worksheet output includes the employee primary assignment details before and after the transfer, including Job Name, Organization Name, and Supervisor Name.

Business Questions

Who has transferred into or out of my supervisor hierarchy?

Parameters

You must specify values for the following parameters:

- Supervisor

- Start Date

- End Date

Employee Primary Assignment Detail Workbook

This workbook enables you to report on basic employee details by employee primary assignment.

The workbook output is grouped by location. Employee primary assignment count totals are shown for each location

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

Business Questions

Show me the primary assignment details for each employee within a specific organization hierarchy.

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Effective Date

- Location

Supervisor Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

The Supervisor Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for a given supervisor and their subordinates.

Business Questions

Show me the primary assignment details for each employee reporting directly or indirectly to a specific supervisor.

Parameters

You must specify values for the following parameters:

- Supervisor

- Effective Date

- Location

Employee Termination Detail Workbook

This workbook enables you to report on employees that have separated within a specified time period.

The workbook displays details of all terminated employees, including their basic primary assignment details at the time of termination, including:

- Employee Name

- Employee Number

- Organization

- Job

- Grade

- Position

- Location

- Supervisor

- Working Hours

- Termination date

- Termination reason

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees that have separated from your enterprise within a specified time period. The worksheet lists employees for a given organization and its subordinate organizations.

Business Questions

Who has separated from my organization hierarchy and why?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Start Date

- End Date

- Budget Measurement Type

Related Topics

Workforce Count, page 3-2

Employee Termination with Comments Detail Workbook

This workbook enables you to report on employees that have separated within a specified time period.

The workbook only displays terminated employees who have a salary. The workbook shows the primary assignment details at the time of employee termination, including:

- Employee Name

- Employee Number

- Organization

- Job

- Grade

- Position

- Location

- Supervisor

- Working Hours

- Salary

- Termination date

- Termination comments

- Termination reason

> **Additional Information:** See also My Oracle Support Knowledge
> Document 2277369.1, *Oracle E-Business Suite Support Implications for
> Discoverer 11gR1.*

Worksheets

This workbook has the following worksheet:

- Organization Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees that have separated from your
enterprise within a specified time period. The worksheet lists employees for a given
organization and its subordinate organizations.

Business Questions

Who has separated from my organization hierarchy and why?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Start Date

- End Date

- Budget Measurement Type

Related Topics

Workforce Count, page 3-2

Human Resource Setup Analysis Workbook

This workbook investigates specific information about your Human Resources system. The workbook enables you to:

- Analyze trends in terminations by ethnic origin

- View basic employee information

- Analyze temporary employee information

- View employee assignment information

- Report on organization hierarchy

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

Worksheets

This workbook has the following worksheets:

- Terminations with EEO

- Anniversary Birthdays

- HR Temp List with Tenure

- Employee Home Address

- Employee Job History

- Assignments by Organization

- Assignments by Organization Rollout

Terminations with EEO Worksheet

This worksheet enables you to analyze terminations with ethnic origin over a specific time period.

Business Questions

Why are employees separating?

Parameters

You must specify values for the following parameters:

- Termination Budget Measurement Type

- Termination Date Lower

- Termination Date Upper

Anniversary Birthdays Worksheet

This worksheet enables you to view birthdays and start dates of current employees. The worksheet also enables you to view other employee information, for example, length of service, employee number, and supervisor name.

Business Questions

When are the birthdays and anniversaries of my employees?

Parameters

This worksheet has no parameters.

HR Temp List with Tenure Worksheet

This worksheet enables you to analyze deployment factors associated with positions, people in specific positions, and position applicants.

Business Questions

How are my employees deployed throughout my organization?

Parameters

This worksheet has no parameters.

Employee Home Address Worksheet

This worksheet enables you to view the primary addresses of employees.

Business Questions

What are my employees' addresses?

Parameters

You must specify values for the following parameters:

- Person Name LIKE

  To restrict the size of the list returned, you can enter part of the employee's name, preceded and followed by the % wildcard.

Employee Job History Worksheet

This worksheet enables you to view employee job history across your organization.

Business Questions

When were my employees assigned to a particular job?

Parameters

You must specify values for the following parameters:

- Job Name

Assignments by Organization Worksheet

This worksheet enables you to report on the assignments within your organizations.

Business Questions

How many assignments are present in each organization?

Parameters

This worksheet has no parameters.

Assignments by Organization Rollup Worksheet

This worksheet enables you emulate the rollup flexibility of HRMSi reports by using an organization hierarchy to control the information displayed.

Business Questions

How many assignments are present in each organization?

Parameters

This worksheet has no parameters.

Person/Assignment History Detail Workbook

This workbook enables you to track applicants, monitor workers' assignment history, and analyze termination history.

For a person's assignment history, you can analyze the following:

- Workforce movement within the organization

- Time between recruitment stages

- Trends via termination reasons

> **Additional Information:** See also My Oracle Support Knowledge
> Document 2277369.1, *Oracle E-Business Suite Support Implications for
> Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Person Assignment

- Application

- Employee Separation

Person Assignment Worksheet

This worksheet enables you to analyze a person's assignment history between specific
dates. For each person you can examine:

- The current assignment

- Details of previous assignments

Business Questions

What has an employee been assigned to?

Parameters

You need to specify values for the following parameters:

- Start Date

- End Date

Application Worksheet

This worksheet enables you to analyze an applicant's assignment record between the
start and end of an application.

For each employee you can examine the following:

- Total number of applications

- Number of successful applications

- Length of time between different application stages

Business Questions

Has a person previously made an application?

Parameters

You need to specify values for the following parameters:

- Start Date

- End Date

Employee Separation Worksheet

This worksheet enables you track termination reasons by type, date, and length of service, allowing you to spot trends among leavers. For each termination, you can:

- Compare termination reasons to discover trends.

- Compare the length of time in an organization against time in a job.

Business Questions

Why are employees leaving the enterprise?

Parameters

This worksheet has no parameters.

Workforce Intelligence (HRMSi) for People Management

Discoverer Reports for People Management

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

Workforce Count (Organization Hierarchy) Trend Analytics Workbook

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

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

Business Questions

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

- By Year and Organization

- By Year and Geography

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

Workbook Headings and Calculations

The worksheets contain the following columns:

- **A time period column**

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

- **Date**

  The start date of each time period.

- **Organization**

   Appears only in the by Year and Organization worksheet.

- **Area**

   Appears only in the by Year and Geography worksheet.

- **Workforce Measurement Value**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Count Change (Organization Hierarchy) Status Analytics Workbook

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

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Organization

- By Geography Area

- By Separation Category

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

Workbook Headings and Calculations

The worksheets contain the following columns:

- **A grouping column**

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

- **Start**

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

- **End**

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

- **Change**

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

- **Change Percent**

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

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

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Separation by Competence (Organization Hierarchy) Status Analytics Workbook

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

Business Questions

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

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Organization

- By Geography Area

- By Scale Level

- By Rank Level

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

By Organization Worksheet and by Geography Area Worksheet Headings and Calculations

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

- **A grouping column**

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

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

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

By Scale Level Worksheet Headings and Calculations

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

The matrix report contains the following columns:

- **Competence**

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

- **Min Required**

  The minimum proficiency level required for the competence.

- **Max Required**

  The maximum proficiency level required for the competence.

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

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

- **Blank**

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

By Rank Level Worksheet Headings and Calculations

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

The matrix report contains the following columns:

- **Competence**

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

- **Min Required**

  The minimum proficiency level required for the competence.

- **Max Required**

  The maximum proficiency level required for the competence.

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

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

- **Blank**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Separation by Competence (Organization Hierarchy) Trend Analytics Workbook

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Start Date**

  The start date of each time period.

- **End Date**

  The end date of each time period.

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

  The number of people in each time period who have separated from the workforce

and hold the competence.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

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

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

Business Questions

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Organization

- By Geography Area

- By Separation Category & Reason

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

Headings and Calculations

The matrix reports contain the following columns:

- **A grouping column**

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

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

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

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

- **Total**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

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

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Start Date**

  The start date of each time period.

- **End Date**

  The end date of each time period.

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

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

- **Total**

  The total number of separations for the time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Separation by Reason (Organization Hierarchy) Status Analytics Workbook

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

Business Questions

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

• Start Date

• End Date

• Organization Hierarchy

• Top Organization

• Rollup Organizations – Yes/No

• Workforce Measurement Type

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

• Geography Area

• Geography Country

• Geography Region

• Geography Location

• Job Category

• Job

• Grade

• Position

Worksheets

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

- By Organization

- By Geography Area

- By Separation Category

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

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

Headings and Calculations

The matrix reports contain the following columns:

- **A grouping column**

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

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

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

- **A blank column**

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

- **Total**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Separation by Reason (Organization Hierarchy) Trend Analytics Workbook

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

workforce over time.

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Start Date**

  The start date of each time period.

- **End Date**

  The end date of each time period.

- **Leaving reason columns** (one column per defined leaving reason, divided into voluntary and involuntary leaving reasons)

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

- **Blank**

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

- **Total**

  The total number of separations for the time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Separation (Organization Hierarchy) Template Analytics Workbook

The Workforce Separation (Organization Hierarchy) Template Analytics workbook provides two worksheets looking at separations from your workforce over time, for

different reasons, and across different organizations.

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

Workbook Parameters

The template includes the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

The template includes the following optional parameters:

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

This template workbook has the following worksheets:

- By Year, Organization and Separation Category

- Details

By Year, Organization and Separation Category Worksheet

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

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

Headings and Calculations

The worksheet contains the following columns:

- **Year**

- **Start Date**

  The start date of the year.

- **End Date**

  The end date of the year.

- **Separation Category columns**

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

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

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

- **Total**

  The total number of separations within each year.

Details Worksheet

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

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

Headings and Calculations

The worksheet contains the following columns:

- **Event date**

  The date on which the separation occurred.

- **Workforce Separations**

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

- **Organization**

  The organization that had the separation.

- **Location**

  The location from which the separation took place.

- **Job**

  The job that had the separation.

- **Grade**

  The grade that had the separation.

- **Position**

  The position that had the separation.

- **Separation Category**

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

- **Separation Reason**

  The reason for the separation.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

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

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

Business Questions

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

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Organization

- By Geography Area

- By Job

- By Grade

- By Position

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

Headings and Calculations

The matrix reports contain the following columns:

- **A grouping column**

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

- **Job Category**

  The job categories that exist for each worksheet grouping.

- **Start**

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

- **End**

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

- **Change**

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

- **Change Percent**

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

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

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

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

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

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Date**

  The start date of each time period.

- **Job Category**

  Lists the job categories that exist within each time period.

- **Workforce Measurement Value**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Count (Organization Hierarchy) Template Analytics Workbook

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

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

Workbook Parameters

The template includes the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

The template includes the following optional parameters:

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

This template workbook has the following worksheets:

- By Year

- Details

By Year Worksheet

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

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

Headings and Calculations

The worksheet contains the following columns:

- **Year**

- **Date**

  The start date of the year.

- **Workforce Measurement Value**

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

Details Worksheet

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

Use the Year page item in the worksheet to select the year you are interested in.

The worksheet displays one row for each organization, location, job, grade, and position.

Headings and Calculations

The worksheet contains the following columns:

- **Organization**

  The organization that had the gain.

- **Location**

  The location where the gain took place.

- **Job**

The job of the gain.

- **Grade**

   The grade of the gain.

- **Position**

   The position of the gain.

- **Workforce Measurement Value**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Gain (Organization Hierarchy) Status Analytics Workbook

The Workforce Gain (Organization Hierarchy) Status Analytics workbook lists the total gains that occurred within a given time period for various groups such as organization, location, gender, and ethnic origin. Each worksheet represents the total gains for one specific grouping. You can also select which area of your enterprise you want to investigate.

The workbook identifies a gain when an employee is inactive one day and active the next. It attributes the gain to the first date on which the employee is active.

The report shows gains caused by transfers in depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of gains to my workforce, broken down into separations, long-term absence ends, transfers and secondary assignment starts, compare for different groupings in my organization?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Organization

- By Geography Area

- Job

- Grade

- Position

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

Headings and Calculations

The worksheets contain the following columns:

- **A grouping column**

   The heading depends on the selected worksheet, for example, in the by Job

worksheet, this column is named "Job".

- **New Starts**

  The total number of new starts for each grouping.

- **Transfers**

  The total number of transfers in for each grouping.

- **Secondary Assignment Starts**

  The total number of secondary assignment starts for each grouping.

- **Long Term Absence Returns**

  The total number of returns from long term absences for each grouping.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Gain (Organization Hierarchy) Trend Analytics Workbook

The Workforce Gain (Organization Hierarchy) Trend Analytics workbook lists the total gains that occurred within a given date range for time periods such as year, semi-year, month, bi-month, and quarter. Each worksheet represents the total gains for one specific time period. You can also select which area of your enterprise you want to investigate.

The workbook identifies a gain when an employee is inactive one day and active the next. It attributes the gain to the first date on which the employee is active.

The workbook shows gains caused by transfers in depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of gains to my workforce, broken down into new starts, long-term absence ends, transfers in and secondary assignment starts, change over time?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

  The heading depends on the selected worksheet, for example, in the by Year

worksheet, this column is named "Year".

- **Start Date**

  The start date of each time period.

- **End Date**

  The end date of each time period.

- **Total Gains**

  The total of all workforce gains due to new starts, transfers in, secondary assignment starts, and long term absence returns.

- **New Starts**

  The total workforce gains attributable to new starters with the organization.

- **Transfers**

  The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

  The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

  The total workforce gains attributable to returns from long term absences.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Gain (Organization Hierarchy) Template Analytics Workbook

The Workforce Gain (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating workforce gains that occur within yearly periods and within different organizations, the other providing a detailed analysis of gains in the workforce.

These worksheets help you to create reports to analyze how your workforce is growing. The workbook identifies a gain when an employee is inactive one day and active the next. It attributes the gain to the first date on which the employee is active.

The workbook shows gains caused by transfers in depending on the portion of the organization hierarchy you are viewing.

Workbook Parameters

The template includes the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

The template includes the following optional parameters:

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

This template workbook has the following worksheets:

- By Year and Organization

- Detail

By Year and Organization Worksheet

The by Year and Organization worksheet analyses how workforce gains have occurred, and compares the gains over time and across organizations.

It displays one row for each organization within each year.

Headings and Calculations

The worksheet contains the following columns:

- **Year**

- **Year Start Date**

- **Year End Date**

- **Organization**

  The name of each organization in which gains have occurred within each year.

- **Total Gains**

  The total of all workforce gains due to new starts, transfers in, secondary assignment starts, and long term absence returns.

- **New Starts**

  The total workforce gains attributable to new starters with the organization.

- **Transfers**

  The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

  The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

  The total workforce gains attributable to returns from long term absences.

Detail Worksheet

The Detail worksheet tells you how the gains occurred and how the gains have been deployed within the workforce.

The worksheet displays one row for all gain events occurring on a specific date within the worksheet parameter start and end dates, within each organization, location, job, grade, and position.

Headings and Calculations

The worksheet contains the following columns:

- **Event Date**

  The date the gain took place.

- **Total Gains**

  The total of all workforce gains occurring on the event date within the same organization, location, job, grade and position.

- **New Starts**

  The total workforce gains attributable to new starters with the organization.

- **Transfers**

  The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

  The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

  The total workforce gains attributable to returns from long term absences.

- **Organization**

  The organization that had the gain.

- **Location**

  The location where the gain took place.

- **Job**

  The job of the gain.

- **Grade**

  The grade of the gain.

- **Position**

  The position of the gain.

- **Workforce Measurement Value**

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

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Gain (Organization Hierarchy) Detail Analytics Workbook

The Workforce Gain (Organization Hierarchy) Detail Analytics Workbook investigates whether workforce is increasing because:

- New employees are being hired by your enterprise.

- Existing employees are being given new assignments in different parts of your enterprise.

- Existing employees are transferring assignments to different parts of your enterprise.

- Existing employees are returning to work from long term absences.

Business Questions

When and how did my workforce gain?

Worksheets

This workbook has the Detail worksheet.

Parameters

You need to specify values for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Headings and Calculations

The worksheet contains the following columns:

- **Event date**

  The date the gain took place.

- **Total Gains**

  The total of all workforce gains due to new starts, transfers in, secondary assignment starts, and long term absence returns.

- **New Starts**

  The total workforce gains attributable to new starters with the organization.

- **Transfers**

  The total workforce gains attributable to transfers into the organization.

- **Secondary Assignment Starts**

  The total workforce gains attributable to the start of new secondary assignments.

- **Long Term Absence Returns**

  The total workforce gains attributable to returns from long term absences.

- **Organization**

  The name of each organization in which gains have occurred within each year.

- **Location**

  The location where the gain took place.

- **Job**

  The job of the gain.

- **Grade**

The grade of the gain.

- **Position**

    The position of the gain.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Loss (Organization Hierarchy) Status Analytics Workbook

The Workforce Loss (Organization Hierarchy) Status Analytics workbook lists the total losses that occurred within a given time period for various groups such as organization, location, gender, and ethnic origin. Each worksheet represents the total losses for one specific grouping. You can also select which area of your enterprise you want to investigate.

The workbook identifies a loss when an employee is active one day and inactive the next. It attributes the loss to the first date on which the employee is not active.

For terminations, the loss occurs one day after the termination separation date (as the termination date coincides with the employees' last day at work).

The workbook includes long-term absences or suspensions only once. If you permanently terminate or transfer an employee who is on long-term absence or suspension, the report does not count the termination or transfer because the employee wasn't active when terminated or transferred.

The report shows losses caused by transfers out depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of losses from my enterprise, broken down into separations, long term absences, transfers and secondary assignment ends, compare for different groupings in my organization?

Workbook Parameters

All worksheets in this workbook have the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Organization

- By Geography Area

- Job

- Grade

- Position

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

Headings and Calculations

The worksheets contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet, for example, in the by Job

worksheet, this column is named "Job".

- **Separations**

  The total number of separations from your organization for each grouping.

- **Transfers**

  The total number of transfers out of your organization for each grouping.

- **Secondary Assignment Ends**

  The total number of secondary assignment ends for each grouping.

- **Long Term Absences**

  The total number of long term absences for each grouping.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Loss (Organization Hierarchy) Trend Analytics Workbook

The Workforce Loss (Organization Hierarchy) Trend Analytics workbook lists the total losses that occurred within a given date range for time periods such as year, semi-year, month, bi-month, and quarter. Each worksheet represents the total losses for one specific time period. You can also select which area of your enterprise you want to investigate.

The workbook identifies a loss when an employee is active one day and inactive the next. It attributes the loss to the first date on which the employee is not active.

For terminations, the loss occurs one day after the termination separation date (as the termination date coincides with the employees' last day at work).

The workbook includes long-term absences or suspensions only once. If you permanently terminate or transfer an employee who is on long-term absence or suspension, the report does not count the termination or transfer because the employee wasn't active when terminated or transferred.

The workbook shows losses caused by transfers out depending on the portion of the organization hierarchy you are viewing.

Business Questions

How does the number of losses from my enterprise, broken down into separations, long term absences, transfers and secondary assignment ends, change over time?

Workbook Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

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

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

- By Position

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

Workbook Headings and Calculations

The matrix reports contain the following columns:

- **A time period column**

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

- **Start Date**

  The start date of each time period.

- **End Date**

  The end date of each time period.

- **Total Losses**

  The total workforce losses for the period.

- **Separations**

  The total workforce losses attributable to separations from your organization.

- **Transfers**

  The total workforce losses attributable to transfers out of the organization for time period.

- **Secondary Assignment Ends**

  The total workforce losses attributable to the ending of secondary assignments within the organization for time period.

- **Long Term Absences**

  The total workforce losses attributable to long term absences from the organization for time period.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Workforce Loss (Organization Hierarchy) Template Analytics Workbook

The Workforce Loss (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating workforce losses that occurred within yearly periods and within different organizations, the other providing a detailed analysis of losses in the workforce.

These worksheets help you to create reports to analyze how your workforce is decreasing. The workbook identifies a loss when an employee is active one day and inactive the next. It attributes the loss to the first date on which the employee is inactive.

The workbook shows losses caused by transfers out depending on the portion of the organization hierarchy you are viewing.

Workbook Parameters

The template includes the following mandatory parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Workforce Measurement Type

The template includes the following optional parameters:

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job Category

- Job

- Grade

- Position

Worksheets

This template workbook has the following worksheets:

- By Year and Organization

- Detail

By Year and Organization Worksheet

The by Year and Organization worksheet analyses when and where workforce losses occur. It compares workforce losses over time and across organizations.

It displays one row for each organization within each year.

Headings and Calculations

The worksheet contains the following columns:

- **Year**

- **Year Start Date**

- **Year End Date**

- **Organization**

  The name of each organization in which losses have occurred within each year.

- **Total Losses**

  The total of all workforce losses due to separations, transfers out, secondary assignment ends, and long term absences.

- **Separations**

  The total workforce losses attributable to separations from the organization.

- **Transfers**

  The total workforce losses attributable to transfers out of the organization.

- **Secondary Assignment Ends**

  The total workforce losses attributable to the ending of secondary assignments.

- **Long Term Absences**

  The total workforce losses attributable to long term absences from the organization.

Detail Worksheet

The Detail worksheet tells you how losses occurred and where losses occurred within the workforce.

The worksheet displays one row for all loss events occurring on a specific date within the worksheet parameter start and end dates, within each organization, location, job, grade, and position.

Headings and Calculations

The worksheet contains the following columns:

- **Event Date**

  The date the loss took place.

- **Organization**

  The organization that had the loss.

- **Location**

  The location where the loss took place.

- **Job**

  The job of the loss.

- **Grade**

  The grade of the loss.

- **Position**

  The position of the loss.

- **Total Losses**

  The total of all workforce losses occurring on the event date within the same organization, location, job, grade and position.

- **Separations**

  The total workforce losses attributable to separations from the organization.

- **Transfers**

  The total workforce losses attributable to transfers out of the organization.

- **Secondary Assignment Ends**

  The total workforce losses attributable to the ending of secondary assignments.

- **Long Term Absences**

   The total workforce losses attributable to long term absences from the organization.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Employee Movement by Organization Analysis Workbook

This workbook investigates changes in organization employees over specified periods of time. Changes are measured using budget measurement type as a parameter, and retrieving the relevant assignment budget value.

The resulting information enables you to:

- Analyze employee turnover across organizations by quarter

- View hire information across organizations

- Analyze terminations across organizations

- View employee transfer information across organizations

Worksheets

This workbook has the following worksheets:

- Hires, Terminations and Transfers

- Hires

- Terminations

- Transfers In

- Transfers Out

Hires, Terminations and Transfers Worksheet

This worksheet enables you to view high-level information about the value of hires, terminations, and transfers in all organizations within your Business Group, by year quarter. The resulting information enables you to:

- Analyze employee changes by quarter.

- Compare employee change across all organizations within a Business Group.

Business Questions

What are the workforce movements within my organization?

Parameters

You must specify values for the following parameters:

- Summary Budget Measurement Type

- Summary Year

- Summary Quarter

Hires Worksheet

This worksheet displays hire information in detail. The worksheet enables you to analyze hire information by job, position, assignment, or location. It enables you to:

- Analyze hire trends within an organization.

- Analyze skills required within an organization.

Business Questions

Who has been hired into my organization?

Parameters

You must specify values for the following parameters:

- Hires Budget Measurement Type

- Hires Year

- Hires Quarter

Terminations Worksheet

This worksheet enables you to analyze terminations within your organizations in detail. For each termination you can analyze employee terminations across all organizations within a Business Group.

Business Questions

Who has left my organization?

Parameters

You must specify values for the following parameters:

- Termination Budget Measurement Type

- Termination Year

- Termination Quarter

Transfers In Worksheet

This worksheet enables you to investigate the total budget value of employees transferring into different organizations in your Business Group. For each transfer you can analyze the:

- Organization transferred from.

- Location transferred from.

- Position or job transferred from.

Business Questions

Who has transferred into my organization?

Parameters

You must specify values for the following parameters:

- Transfers In Budget Measurement Type

- Transfers In Year

- Transfers In Quarter

Transfers Out Worksheet

This worksheet enables you to investigate the total budget value of employees transferring out of different organizations in your Business Group. For each transfer you can analyze the:

- Organization transferred to.

- Location transferred to.

- Position or job transferred to.

Business Questions

Who has transferred out of my organization?

Parameters

You must specify values for the following parameters:

- Transfers Out Budget Measurement Type

- Transfers Out Year

- Transfers Out Quarter

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

Employee Primary Assignment Count (by Location and Employment Category) Comparison Workbook

This workbook enables you to report on employee primary assignment numbers by location, for organization and supervisor hierarchies.

The workbook groups employee primary assignments by employment category (for example, Fulltime – Regular, Fulltime – Temporary). Employee assignments that are not assigned an employment category display in a blank worksheet column.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Without Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given organization hierarchy.

You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Business Questions

How many employees for a given organization work in each location?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Effective Date

- Assignment Statuses To Include

- Locations to Include

The worksheet includes employees who have an assignment on the effective date, at a selected location, within the selected organization hierarchy.

You can further restrict the report by using the following parameter:

- Person Types to Exclude

Without Organization Hierarchy Worksheet

The Without Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location without using organization or supervisor hierarchies.

You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Business Questions

How many employees work in each location?

Parameters

You must specify values for the following parameters:

- Effective Date

- Assignment Statuses To Include

- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes the selected people types who have an assignment on the effective date that matches a selected assignment status, and is at a selected location.

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given supervisor.

You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Business Questions

How many employees reporting to a specific supervisor work in each location?

Parameters

You must specify values for the following parameters:

- Supervisor Name

- Effective Date

- Assignment Statuses To Include

- Locations to Include

You can further restrict the report by using the following parameter:

- Person Types to Exclude

The worksheet includes employees who have an assignment on the effective date with a selected assignment status, at a selected location, and within the selected supervisor hierarchy.

Related Topics

Workforce Intelligence for People Management Key Concepts, page 3-2

4

Competencies, Qualifications, and Development Intelligence

Competencies, Qualifications, and Development Intelligence

Key Concepts for Competencies, Qualifications, and Development Intelligence

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

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

Competencies and Proficiencies

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

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

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

Competence (Skill) Development Detail Workbook

This workbook investigates the skills of your workforce, with regard to skills held by workers, skills required, or skills delivered through training, within your organization. The resulting information enables you to:

- View competencies owned by workers within your organization

- Analyze competence shortages within your organization

- Analyze competencies delivered by training

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Competence Delivered by Training Activity

- Competence Requirement

- Person Competence Profile

Competence Delivered by Training Activity Worksheet

This worksheet reports on competencies delivered by training activities and events. The resulting information enables you to:

- Compare the competencies delivered by training to those required.

- Analyze training efficiency.

Business Questions

Which competencies do courses provide?

Competence Requirement Worksheet

This worksheet displays competence requirements for all organizations within a business group. The worksheet enables you to analyze competence requirements for business groups, organizations, jobs, positions, and grades. For each requirement you can investigate the:

- Competencies needed for a particular job.

- Skills shortages within an organization.

Business Questions

Which jobs require a particular competence, and at what level?

Headings and Calculations

This worksheet uses the following calculations:

- **Required For**

  Populates the Required For column with the organization and job that require a particular competence.

Person Competence Profile Worksheet

This worksheet enables you to analyze people's competency profiles by type. It enables you to:

- View people with similar competencies.

- Compare people of similar grade.

Business Questions

How proficient is an individual for a particular competence?

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 4-2

Appraisal Detail Workbook

This workbook provides the details of a range of appraisals, enabling you to view the participants, dates, and outcomes of multiple appraisals in one place. You can view all appraisals within your business group, target a specific subset of one supervisor's ongoing appraisals, or specify other combinations.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook contains two worksheets:

- Appraisal Detail by Organization Hierarchy

- Appraisal Detail by Supervisor Hierarchy

Appraisal Detail by Organization Hierarchy Worksheet

This worksheet gives details of completed or ongoing appraisals performed on workers in a given organization. Data includes appraisee and appraiser names, dates, durations, and final ratings.

Business Question

What are the details of appraisals performed in my department?

Parameters

You must enter values for five parameters:

- Organization Hierarchy

- Top Organization

- Rollup Organization

- Start Date

- End Date

Appraisal Detail by Supervisor Hierarchy Worksheet

This worksheet gives details of completed or ongoing appraisals performed on workers under a specified supervisor. Data includes appraisee and appraiser names, dates, durations, and final ratings.

Business Question

What are the details of appraisals performed on my direct and indirect reports?

Parameters

You must enter values for three parameters:

- Supervisor

- Start Date

- End Date

Competence Updates after Appraisal Workbook

The Competence Updates after Appraisal Workbook enables administrators and managers to view competence updates, both automatic and manual, made as a result of a completed appraisal. You can view competence updates for all appraisals within your business group, target a specific subset of one supervisor's ongoing appraisals, or specify other combinations.

> **Additional Information:** See also My Oracle Support Knowledge
> Document 2277369.1, *Oracle E-Business Suite Support Implications for*
> *Discoverer 11gR1.*

Worksheets

This workbook contains two worksheets:

- Competence Updates after Appraisal by Organization Hierarchy

- Competence Updates after Appraisal by Supervisor Hierarchy

Competence Updates after Appraisal by Organization Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals
performed on workers in a given organization. Data includes appraisee and appraiser
names, dates, competence names, and new and previous (if any) proficiency levels for
each competence.

Business Questions

What competence updates have appraisees in my department received through appraisals?

Parameters

You must enter values for five parameters:

- Organization Hierarchy

- Top Organization

- Rollup Organization

- Start Date

- End Date

Competence Updates after Appraisal by Supervisor Hierarchy Worksheet

This worksheet lists competence updates resulting from completed appraisals
performed on workers under a specified supervisor.

Business Questions

What competence updates have my direct and indirect reports received through appraisals?

Parameters

You must enter values for three parameters:

- Supervisor

- Start Date

- End Date

Competence Levels (Organization Hierarchy) Detail Analytics Workbook

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

Business Questions

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

Parameters

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

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Person Assignment Type

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

- Competence Name

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

Worksheets

This workbook has the following worksheets:

- By Person with Rank

- By Person

By Person with Rank Worksheet

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

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

Headings and Calculations

The Person with Rank worksheet contains the following columns:

- **Person**

  The person's name.

- **Proficiency Level**

  Each person's proficiency level for the selected competence.

- **Proficiency Level Percent**

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

- **Proficiency Level Rank**

  Each person's proficiency rank for the selected competence.

- **Proficiency Rank Percent**

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

By Person Worksheet

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

Headings and Calculations

This worksheet uses the following calculations:

- **Person**

  The person's name.

- **Proficiency Level**

  Each person's proficiency level for the selected competence.

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 4-2

Competence Match (Organization Hierarchy) Status Analytics Workbook

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

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

Business Questions

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

Parameters

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

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Job

- Person Assignment Type

Worksheets

This workbook has the following worksheets:

- Compare to Minimum Proficiency

- Compare to Range

- By Organization and Location

- By Person

- By Person Graph

Compare to Minimum Proficiency Worksheet

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

Headings and Calculations

The Compare to Minimum Proficiency worksheet contains the following columns:

- **Competence**

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

- **Min Required**

  The minimum level required for the competence.

- **Max Required**

  The maximum level required for the competence.

- **Without Competence**

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

- **Without Level**

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

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

The columns are as follows:

Column Name	Rating
<-3	More than three levels below the competence minimum level
-3	Three levels below the competence minimum level
-2	Two levels below the competence minimum level

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

Compare to Range Worksheet

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

Headings and Calculations

The Compare to Range worksheet contains the following columns:

- **Competence**

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

- **Min Required**

  The minimum level required for the competence.

- **Max Required**

  The maximum level required for the competence.

- **Without Competence**

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

- **Without Level**

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

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

The columns are as follows:

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

By Organization and Location Worksheet

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

Headings and Calculations

The by Organization and Location worksheet contains the following columns:

• **Location Name**

- **Organization**

  The organizations within each location.

- **Competence**

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

- **Person**

  The people in each organization who hold the selected job.

- **Required Proficiency Level**

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

- **Requirement Effective From**

  The date the proficiency level requirement began.

- **Requirement Essential**

  Whether the competence is essential for the job.

- **Attained Proficiency Level**

  The proficiency level attained by the person.

- **Date Attained**

  The date the person attained the proficiency level.

By Person Worksheet

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

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

Headings and Calculations

The worksheet contains the following columns:

- **Competence**

  The competencies you have defined for the selected job.

- **Requirement Effective From**

  The date the proficiency level requirement began.

- **Requirement Essential**

  Whether the competence is essential for the job.

- **Attained Proficiency Level**

  The proficiency level attained by the person.

- **Date Attained**

  The date the person attained the proficiency level.

By Person Graph Worksheet

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

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

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

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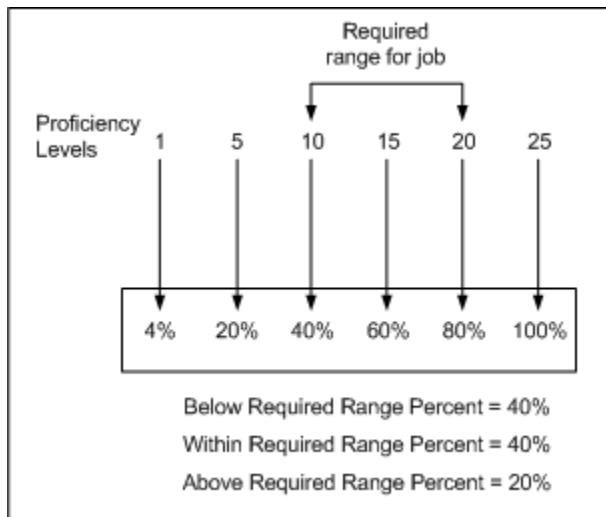
Headings and Calculations

The worksheet contains the following columns:

- **Competence**

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

- **Below Required Range Percent**

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

- **Within Required Range Percent**

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

- **Above Required Range Percent**

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

- **Attained Level Percent**

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

Graph

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

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

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

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

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

Related Topics

Workforce Intelligence for Competencies, Qualifications and Development Key Concepts, page 4-2

5

People, Jobs, Budgets, and Costing Intelligence

Workforce Intelligence for Jobs and Positions

Employee Job and Position Detail Workbook

This workbook allows you to analyze aspects associated with jobs and positions within your organization. It allows you to:

- Compare requirements for positions across Business Groups.

- Analyze requirements for positions against those held by employees or applicants.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Parameters

This workbook has no parameters.

Worksheets

This workbook has the following worksheets:

- Workforce by Job and Position

- Work Choices by Job

- Work Choices by Position

- Job and Position Special Information

Workforce by Job and Position Worksheet

This worksheet enables you to analyze assignment details for employees within an organization by job and position.

Business Questions

Who in my workforce occupies a particular job or position?

Work Choices by Job Worksheet

This worksheet enables you to analyze deployment factors for jobs, people in specific

jobs, and job applicants.

Business Questions

What are the working preferences of my employees?

Headings and Calculations

This worksheet uses the following calculations:

- **Calc Job**

  Populates the Calc Job page item in the worksheet. It returns the Deployment
  Factors Job name, but if that is not present, it returns Employee Assignments Job
  Name.

Work Choices by Position Worksheet

This worksheet enables you to analyze deployment factors for positions, people in
specific positions, and position applicants.

Business Questions

What are the working preferences of my employees?

Headings and Calculations

This worksheet uses the following calculations:

- **Calc Job**

  Populates the Calc Job page item in the worksheet. It returns the Deployment
  Factors Job name, but if that is not present, it returns Employee Assignments Job
  Name.

Job and Position Special Information Worksheet

This worksheet enables you to analyze special information types associated with jobs
and positions.

Business Questions

What other information is relevant to a particular job or position?

Workforce Intelligence Key Concepts for People Budgets and Costing

Key Concepts for People Budgets and Costing Intelligence

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

- Workforce Count, page 5-4

- Control Budgets, page 5-4

Workforce Count

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

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

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

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

Control Budgets

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

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

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

Workforce Intelligence (HRMSi) for People Budgets and Costing

Employee Budget Trend Workbook

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

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

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

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

Worksheets

This workbook has the following worksheets:

- Open Budgets

- By Organization

- By Job

- By Grade

- By Position

Workbook Parameters

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

- Business Group

- Budget Name

Key Concepts

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

Budget Entities

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

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

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

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

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

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

Headings and Calculations

The report uses the following calculations:

- **Workforce Variance**

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

- **Workforce variance ratio**

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

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 5-4

Employee Budget Status Workbook

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

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

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

Worksheets

This workbook has the following worksheets:

- Organization Budget

- Job Budget

- Grade Budget

- Position Budget

Workbook Parameters

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

- Business Group

- Budget Name

- Budget Version

- Organization / Job / Grade / Position (depending on which worksheet you run)

Key Concepts

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

Budget Entities

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

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

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

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

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

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

Headings and Calculations

The report uses the following calculations:

- **Workforce Variance**

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

- **Workforce variance ratio**

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

Related Topics

Workforce Intelligence for People Budgets and Costing Key Concepts, page 5-4

6

Leave and Absence Management Intelligence

Leave and Absence Management Intelligence

Workforce Intelligence Key Concepts for Leave and Absence Management

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

- Absence Hours, page 6-2

- Working Hours, page 6-2

Absence Hours

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

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

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

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

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

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

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

Working Hours

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

through formulas, which you must provide using Oracle FastFormula.

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

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

- Be active or suspended.

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

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

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

Employee on Leave Detail Workbook

This workbook enables you to report on employees who are on a leave of absence on a particular effective date. The workbook shows the following employee primary assignment details:

- Employee number

- Organization

- Supervisor

- Location

- Hire date

- Absence details, including date start and date end

    Additional Information: See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employees who are on leave on the effective date chosen. Employees are listed for a given organization and its subordinate organizations. The additional parameter, Absence Types to Exclude, enables you to exclude absence types that are not of interest, for example, Unpaid Leave.

Business Questions

When are my employees in an organization hierarchy on leave?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Effective Date

Supervisor Hierarchy Worksheet

This worksheet enables you to report on employees who are on leave on the effective date chosen. Employees are listed for a given supervisor and his/her subordinates. The additional parameter, Absence Types to Exclude, enables you to exclude absence types that are not of interest, for example, Unpaid Leave.

Business Questions

When are employees, reporting directly or indirectly to a specific supervisor, on leave?

Parameters

You must specify values for the following parameters:

- Supervisor

- Effective Date

Employee Absence Hours (Organization Hierarchy) Trend Analytics Workbook

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

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

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

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

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

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

Business Question

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

Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

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

- Geography Area

- Geography Country

- Geography Region

- Geography Location

- Job

- Grade

- Position

Worksheets

This workbook has the following worksheets:

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

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

Headings and Calculations

All worksheets contain the following columns:

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

- **End Date:** The end date of the time period.

- **A time period column:** The heading depends on the selected worksheet, for example, in the by Year worksheet, this column is named "Year".

- **Absence Hours:** The absence hours incurred during the time period.

Related Topics

Absence Hours, page 6-2

Employee Hours Worked (Organization Hierarchy) Trend Analytics Workbook

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

Business Questions

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

Parameters

You must enter a value for the following parameters:

• Start Date

• End Date

• Organization Hierarchy

• Top Organization

• Rollup Organizations – Yes/No

• Payroll Name – you can select multiple payrolls

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

• Location (Geography)

• Job Name

• Grade Name

• Position Name

Worksheets

This workbook has the following worksheet:

• By Payroll Period

The worksheet displays one row for each payroll period.

Headings and Calculations

The worksheet contains the following columns:

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

- **Period End Date:** The end date of the payroll period.

- **Headcount:** Regular hours worked during the payroll period calculated as a headcount.

- **Fulltime Equivalent:** Regular hours worked during the payroll period calculated as Full Time Equivalent.

- **Overtime Band columns:** The number of overtime hours worked for the overtime band within each payroll period, with one column for each band you have included in Oracle FastFormula.

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

Related Topics

Working Hours, page 6-2

7

Salary and Grade Related Pay and Progression Intelligence

Salary and Grade Related Pay and Progression Intelligence

Key Concepts for Salary, Grades, and Pay Administration Intelligence

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

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

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

- Salary Currencies, page 7-2
- Salary Annualization, page 7-2
- Grade Annualization, page 7-3
- Salaries and Assignments, page 7-3

Salary Currencies

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

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

Salary Annualization

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

Grade Annualization

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

Salaries and Assignments

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

- Be active or suspended.

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

- Have the latest approved salary proposal. Assignments with unapproved salary proposals are not included.

- Have all components of a salary increase approved.

- Have a performance rating related to a current approved salary, if you group by performance.

- Fit the criteria you enter. For example, if you enter a location, the assignment must be for that location.

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

Employee Primary Assignment with Salary and Grade Rate Detail Workbook

This workbook enables you to report on employees based on their primary assignment. The workbook output is in a non-legislative specific format, which is useful for global reporting.

You can report on employee details, including:

- Current annual salary

- Previous annual salary

- Salary grade rates

- Date of birth

- Working hours

- Gender

- Age

> **Additional Information:** See also My Oracle Support Knowledge
> Document 2277369.1, *Oracle E-Business Suite Support Implications for*
> *Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employee details based on the employee
primary assignment (in a non-legislative specific format) for a given organization and
its subordinate organizations.

Business Questions

How much do my employees within each organization earn and how does that compare with
their grade rate?

Worksheet Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Effective Date

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

Headings and Calculations

This report uses the following calculations:

- **Annualized Grade Minimum**

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

- **Annualized Grade Mid Value**

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

- **Annualized Grade Maximum**

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

- **Salary Increment**

  Calculates an employee's salary increment as a percentage of the previous salary.

- **Recent Years Service**

  Calculates the employee's length of service as the number of years since their most recent hire date.

Supervisor Hierarchy Worksheet

This worksheet enables you to report on employee details based on the employee primary assignment (in a non-legislative specific format) for a given supervisor and his/her subordinates.

Business Questions

How much do the employees for a given supervisor earn and how does that compare with their grade rate?

Worksheet Parameters

You must specify values for the following parameters:

- Supervisor

- Effective Date

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

Headings and Calculations

This report uses the following calculations:

- **Annualized Grade Minimum**

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

- **Annualized Grade Mid Value**

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

- **Annualized Grade Maximum**

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

- **Salary Increment**

  Calculates an employee's salary increment as a percentage of the previous salary.

- **Recent Years Service**

  Calculates the employee's length of service as the number of years since their most recent hire date.

Related Topics

Salary, Grades, and Pay Administration Key Concepts, page 7-2

Employee Primary Assignment with Salary Detail Workbook

This workbook enables you to report on employee details based on employee primary assignment, in a non-legislative specific format. This is useful for global reporting.

Employee details include:

- Current annual salary

- Hire date

- Employment category

  Additional Information: See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employee details based on employee primary assignment, in a non-legislative specific format, for a given organization and its subordinate organizations.

Business Questions

How much do my employees within each organization earn?

Worksheet Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Effective Date

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

Supervisor Hierarchy Worksheet

This worksheet enables you to report on employee details based on employee primary assignment, in a non-legislative specific format, for a given supervisor and his/her subordinates.

Business Questions

How much do the employees for a given supervisor earn?

Worksheet Parameters

You must specify values for the following parameters:

- Supervisor

- Effective Date

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

Related Topics

Salary, Grades, and Pay Administration Key Concepts, page 7-2

Employee Salary Change Detail Workbook

This workbook investigates salary changes over specified periods of time within your organization. The resulting information allows you to:

- Compare salary changes for similar organizations

- Analyze employee salary by length of service

- Analyze salary change by gender

- Ensure employees are rewarded for high performance

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

Worksheets

This workbook has the following worksheets:

- Summary

- By Years of Service

- By Gender

- By Performance Rating

- By Person

Summary Worksheet

This worksheet enables you to view information about salary changes within your organization. The resulting information allows you to analyze salary changes across all organizations in a Business Group.

What are the details of the most recent salary changes for employees?

Parameters

You must specify a value for the following parameter:

• Salary Change Date

By Years of Service Worksheet

This worksheet displays salary change information by years of service across organizations. The resulting information allows you to:

• Compare salary change across Business Groups and organizations.

• View salary change information by length of service.

Business Questions

What are the details of the most recent salary changes for my employees, by years of service?

Parameters

You must specify a value for the following parameter:

• Salary Change Date

By Gender Worksheet

This worksheet enables you to analyze salary change within your organization, by gender. It enables you to analyze differences in salary changes between male and female employees across organizations.

Business Questions

What are the details of the most recent salary changes for my employees, by gender?

Parameters

You must specify a value for the following parameter:

• Salary Change Date

By Performance Rating Worksheet

This worksheet enables you to investigate the effects of performance ratings on

employee salary change across organizations. It enables you to ensure employees are rewarded for performance.

Business Questions

What are the details of the most recent salary changes for my employees, by performance?

Parameters

You must specify a value for the following parameter:

• Salary Change Date

By Person Worksheet

This worksheet enables you to investigate salary changes for individual employees.

Business Questions

What are the details of the most recent salary changes for my individual employees?

Parameters

You must specify a value for the following parameter:

• Salary Change Date

Related Topics

Salary, Grades, and Pay Administration Key Concepts, page 7-2

Employee Salary Change Workbook

This workbook enables you to report on employee salary change details; for example, the latest salary increment, the effective date of a salary change, the salary level compared to the grade minimum, mid value and maximum value. The details can be shown for a chosen period of time.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

The Organization Hierarchy worksheet enables you to report on employee salary change details by organization hierarchy for a given time period.

Business Questions

When did my employees' salaries change, and by how much?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Start Date

- End Date

The worksheet includes those employees who held a primary assignment, were employed in the selected organization hierarchy, and had a salary change, during the period from your selected Start Date to your selected End Date.

You can also enter a value for the following optional parameter:

- Organization Hierarchy Effective Date

If you use the Organization Hierarchy Effective Date parameter, the worksheet will use the Organization Hierarchy Version effective on this date to display organization Hierarchy information.

This date will affect the output of your worksheet if your selected Start Date and End Date parameters cover more than one Organization Hierarchy Version for your selected Organization Hierarchy.

If you do not use the Organization Hierarchy Effective date parameter, the worksheet will default to the Organization Hierarchy Version effective on your selected End Date.

Headings and Calculations

This report uses the following calculations:

- **Annualized Grade Minimum**

  Calculates the annualized minimum payment in a grade range. The calculation uses

the grade annualization factor that is set up as part of the pay basis.

- **Annualized Grade Mid Value**

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

- **Annualized Grade Maximum**

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

- **Previous Annual Salary**

    Calculates the previous annual salary amount for an employee.

- **Salary Increment**

    Calculates an employee's salary increment as a percentage of the previous salary.

Supervisor Hierarchy Worksheet

The Supervisor Hierarchy worksheet enables you to report on employee salary change details by supervisor hierarchy for a given time period.

Business Questions

When did my employees' salaries change, and by how much?

Parameters

You must specify values for the following parameters:

- Supervisor

- Start Date

- End Date

The worksheet includes those employees who held a primary assignment, were employed by the selected supervisor, and had a salary change, during the period from your selected Start Date to your selected End Date.

Headings and Calculations

This report uses the following calculations:

- **Annualized Grade Minimum**

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

- **Annualized Grade Mid Value**

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

- **Annualized Grade Maximum**

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

- **Previous Annual Salary**

  Calculates the previous annual salary amount for an employee.

- **Salary Increment**

  Calculates an employee's salary increment as a percentage of the previous salary.

Related Topics

Salary, Grades, and Pay Administration Key Concepts, page 7-2

Employee with Tenure Detail Workbook

This workbook enables you to report on current employee tenure details based on the employee primary assignment in a non-legislative specific format.

In addition to the basic employee primary assignment details, you can report on:

- Most recent hire date

- Original date of hire

- Total years of service

- Recent years of service

  > **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

This worksheet enables you to report on employee tenure details (based on the employee primary assignment in a non-legislative specific format) for a given organization and its subordinate organizations.

Business Questions

How long have my employees within a given organization hierarchy been working within my enterprise?

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Employment Category

The worksheet includes those employees currently employed within the selected organization hierarchy, and within the selected employment category.

Headings and Calculations

This report uses the following calculations:

- **Recent Years Service**

  Calculates the employee's length of service since their most recent hire date as a number of years.

- **Total Years Service**

  Calculates the employee's length of service since their first hire date as a number of years.

Supervisor Hierarchy Worksheet

This worksheet enables you to report on employee tenure details (based on the employee primary assignment in a non-legislative specific format) for a given supervisor and his/her subordinates.

Business Questions

How long have employees, reporting directly or indirectly to a given supervisor, been working within my enterprise?

Parameters

You must specify values for the following parameters:

- Supervisor

- Employment Category

The worksheet includes those employees currently employed by the selected supervisor, and within the selected employment category.

Headings and Calculations

This report uses the following calculations:

- **Recent Years Service**

  Calculates the employee's length of service since their most recent hire date as a number of years.

- **Total Years Service**

  Calculates the employee's length of service since their first hire date as a number of years.

Related Topics

Salary, Grades, and Pay Administration Key Concepts, page 7-2

Employee Salary by Job and Grade Status Workbook

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

Worksheets

This workbook has the following worksheets:

- Organization Hierarchy

- Supervisor Hierarchy

Organization Hierarchy Worksheet

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

Business Questions

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

Parameters

You must specify values for the following parameters:

- Organization Hierarchy

- Top Organization

- Effective Date

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

Headings and Calculations

This report uses the following calculations:

- **Annualized Grade Maximum**

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

- **Annualized Grade Mid Value**

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

- **Annualized Grade Minimum**

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

- **Number of incumbents**

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

Supervisor Hierarchy Worksheet

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

Business Questions

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

Parameters

You must specify values for the following parameters:

• Supervisor

• Effective Date

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

Headings and Calculations

This report uses the following calculations:

• **Annualized Grade Maximum**

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

• **Annualized Grade Mid Value**

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

• **Annualized Grade Minimum**

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

• **Number of incumbents**

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 7-2

Salary Survey Comparison Workbook

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

Worksheets

This workbook has the following worksheets:

- Salary Survey Mappings

Salary Survey Mappings Worksheet

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

Business Questions

What are the details of salary surveys?

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 7-2

Employee Salary (Organization Hierarchy) Trend Analytics Workbook

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

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

Business Questions

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

Workbook Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Convert to Currency

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

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

- Area

- Country

- Region

- Location

- Job

- Grade

- Position

- Performance Rating

- Include Currencies

Worksheets

This workbook has the following worksheets:

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

- By Year and Organization

- By Quarter and Organization

- By Month and Organization

The worksheets display one row for each time period. For example, the by Year worksheet displays one row per year. The three reports that include Organization break

the data down even further. For example, the by Month and Organization worksheet displays one row for each month per organization.

Headings and Calculations

All worksheets contain the following columns:

- **A time period column**

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

- **Organization**

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

- **Date**

  The date corresponding to the start of each time period.

- **Total Salary**

  The total salary for each time period and organization.

- **Average Salary**

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 7-2

Employee Salary Component (Organization Hierarchy) Trend Analytics Workbook

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

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

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

currency.

Business Questions

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

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

Workbook Parameters

You must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Convert to Currency

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

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

- Location

- Job Category

- Job

- Grade

- Position

- Salary Component Reason

- Include Currencies

Worksheets

This workbook has the following worksheets:

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

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

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

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **A time period column**

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

- **Salary component reason columns**

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

- **Blank**

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

- **Total**

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

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 7-2

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

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

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

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

Business Questions

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

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

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

Workbook Parameters

You must enter a value for the following parameters:

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Convert to Currency

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

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

- Location

- Job

- Grade

- Position

- Include Currencies

Worksheets

This workbook has the following worksheets:

- Full Details

- Graph

Full Details Worksheet

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

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

Business Questions

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

Worksheet Headings and Calculations

The table displays the following columns:

- **Grade**

  The employee's current grade.

- **Person**

  The employee's name.

- **Salary**

  The employee's current salary.

- **Grade Min**

  The minimum salary for the grade

- **To Min**

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

- **Grade Mid**

The mid salary for the grade

- **To Mid**

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

- **Grade Max**

  The maximum salary for the grade

- **To Max**

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

- **Organization**

  The employee's organization.

- **Location**

  The employee's location.

- **Job**

  The employee's job.

- **Position**

  The employee's position.

Graph Worksheet

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

The table displays one row for each employee.

Business questions

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

Worksheet Headings and Calculations

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

- **Person**

  The employee's name.

- **Below Min**

   The grade minimum value.

- **Min to Mid**

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

- **Mid to Max**

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

Chart

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

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 7-2

Employee Salary by Group (Organization Hierarchy) Status Analytics Workbook

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

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

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

Business Questions

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

How do salaries vary between different ethnic groups?

Workbook Parameters

You must enter a value for the following parameters:

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Convert to Currency

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

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

- Location

- Job Category

- Job

- Grade

- Position

- Include Currencies

Worksheets

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

- By Organization

- By Location

- By Job

- By Grade

- By Position

- By Performance Rating

- By Length of Work Band

- By Age Band

- By Gender

- By US Ethnic Group

- By GB Ethnic Group

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

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

Headings and Calculations

All worksheets contain the following columns

- **A grouping column**

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

- **Average Salary**

  The current average annualized salary per grouping.

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 7-2

Employee Salary Spread (Organization Hierarchy) Detail Analytics Workbook

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

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

Business Questions

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

How do salaries vary across age groups?

How do salaries vary across organizations or locations?

To what extent do salaries increase with length of service?

Key Concepts

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

Workbook Parameters

You must enter a value for the following parameters:

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Convert to Currency

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

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

- Location

- Job

- Grade

- Position

- Performance Rating

- Include Currencies

Worksheets

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

- By Organization

- By Location

- By Job

- By Grade

- By Position

- By Performance Rating

- By Age

- By Length of Service

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

Headings and Calculations

All worksheets contain the following columns

- **A grouping column**

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

- **Person**

  Employee names listed within each grouping.

- **Total Salary**

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

Related Topics

Salary and Grade Related Pay and Progression Key Concepts, page 7-2

8

Health and Welfare Administration Intelligence

Health and Welfare Administration Intelligence

Action Items and Certifications Workbook

This workbook enables you to identify a person's outstanding enrollment action items if any. It also enables you to decide whether to unsuspend elections or consider the life events as complete.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Action Items

- Certifications

You must supply values for the following parameters of the worksheet:

- Employee Name

- Employee Number

- National Identifier

Action Items Worksheet

This worksheet enables you to display the following details for each person:

- Life event causing the action item

- Program name

- Plan type name

- Plan and option names

- Action type name and description

- Action item required

- Action item due and completed dates

- Enrollment suspended or not suspended

Business Questions

What open action items exist for the employees' enrollment?

Certifications Worksheet

This worksheet enables you to identify the certifications that the participant provides in a plan to satisfy the enrollment certification requirements. It enables you to identify the following details for each person:

- Life event name

- Program name

- Plan name and type

- Option name

- Details about enrollment certification, such as the certification type, required or optional, required and received dates, and denied certification information

Business Questions

What certifications have the employees provided for their enrollment?

Dependents and Beneficiaries Workbook

This workbook enables you to identify the persons or organizations that benefits participants designate as their beneficiaries or dependents.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Dependent Designations

- Beneficiary Designations

You must supply values for the following parameters of the worksheet:

- Employee Name

- Employee Number

- National Identifier

Dependent Designations Worksheet

This worksheet enables you to identify the persons that participants designate as dependents. This worksheet displays the following details for each person:

- Life name

- Program name

- Plan name and type

- Option name

- Dependent name and relationship to participant

- Dependent coverage rates

- Certification details such as the type, dates, and requirement status

Business Questions

Who have the employees designated as their dependents?

Beneficiary Designations Worksheet

This worksheet enables you to identify the persons or organizations that participants designate in a plan as beneficiaries of plan benefits. It displays the following details for each person:

- Life event name

- Program name

- Plan name and type

- Option name

- Beneficiary name and type

- Coverage percentage and amount

- Designation dates

- Trustee details

- Additional instructions if any

- Certification details, such as the type, dates, and requirement

Business Questions

Who have the employees designated as their beneficiaries?

Enrollment Rates and Premiums Workbook

This workbook enables you to identify the following information:

- Standard rates

- Total flex credits

- Imputed income for a person enrolled in a plan or option in plan

- Premium values

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Enrollment Rates

- Premiums

You must supply values for the following parameters of the worksheet:

- Employee Name

- Employee Number

- National Identifier

Enrollment Rates Worksheet

This worksheet displays the following details for each program:

- The participants and the plans or options in which they are enrolled

- Corresponding standard rates and rate types

- Defined, communicated, and annual amounts

Business Questions

What are the enrollment rates for the employees' programs?

Premiums Worksheet

This worksheet displays the participant details, such as the plans or options in which they have enrolled, the corresponding premium amount, currency, and activity period.

Business Questions

What are the premium rates for the employees' programs?

Health Cost Report Workbook

This workbook enables you to identify the existing health plans for a person.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

Worksheets

This workbook has the following worksheets:

- Plan

- Person

You must supply a value for the Program Name parameter for these worksheets.

> **Note:** You need an Advanced Benefits licence to obtain meaningful data in these two worksheets.

Plan Worksheet

The Plan worksheet enables you to report on the defined, annual, and communicated amounts for each plan. It provides the sum total of the entire plan and option combinations. For each plan/option combination, the worksheet displays the calculation

result in a matrix format.

Business Questions

What are the cost details for the medical plans in which employees have enrolled?

Person Worksheet

This worksheet displays the details of participants enrolled in each plan. It enables you to report on the defined, annual, and communicated amounts for each plan. You can also report the total amount of the plan or option for each individual employee.

Business Questions

How many employees have enrolled in a specific plan?

Life Event Summary Workbook

This workbook enables you to identify the existing life events for a person. You can also identify the potential life events and the ones currently in progress.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Worksheets

This workbook has the following worksheets:

- Person Life Events

- Potential Life Events

You must specify values for the start and end date parameters for both these worksheets.

> **Note:** You need an Advanced Benefits licence to obtain meaningful data in these two worksheets.

Person Life Events Worksheet

This worksheet enables you to report on the total number of processed life events with the following statuses:

- Processed

- Started

- Backed-out

- Voided

This report uses calculations with the following statuses:

- Backed out

- Processed

- Started

- Voided

- Total

Business Questions

What are this person's life events? What is the status of those events?

Potential Life Events Worksheet

This worksheet enables you to report on the total number of processed life events with the following statuses:

- Detected

- Manual override

- Processed

- Unprocessed

- Voided

- Total

Business Questions

What are the potential life events and what is their status?

9

Payroll Processing and Analysis Intelligence

Payroll Processing and Analysis Intelligence

Costing Detail Workbook

The Costing Detail workbook enables you to review cost allocations for an element, element set, or a particular element classification.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Business Questions

Are my costs assigned to the correct cost center?

What are my cost totals for an element, element set, or element classification?

Worksheets

Costing Detail worksheet.

Parameters

You need to specify values for the following parameters:

- Costing Effective Date Begin

- Costing Effective Date End

- Element Set (only mandatory if you do not specify an Element, or Element Classification)

- Element Classification (only mandatory if you do not specify an Element, or Element Set)

- Element (only mandatory if you do not specify an Element Set, or Element Classification)

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

- Costing Process

- Payroll

- Consolidation Set Name

- Organization

- Location

- Employee

- Reporting Currency

- Include Estimate Costing

Costing Summary Workbook

The Costing Summary workbook enables you to view total costing details for a payroll, consolidation set, or organization name.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Business Questions

What are my overall debits and credits for a particular costing period?

Worksheets

Costing Summary worksheet.

Parameters

You need to specify values for the following parameters:

- Costing Effective Date Begin

- Costing Effective Date End

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

- Costing Process

- Payroll Name

- Consolidation Set Name

- Organization Name

- Reporting Currency

- Include Estimate Costing

Element Detail Workbook

The Element Detail workbook enables you to select an element effective date and element classification and then view further details for all elements within these reporting criteria.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Business Questions

What are the attributes for each element within a particular element classification?

Do any of my selected elements belong to a proration group or recalculation group, and if so, which group?

Are any of my selected elements paid separately or processed separately?

Worksheets

Element Detail worksheet.

Parameters

You need to specify values for the following parameters:

- Effective Date

- Classification

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

- Processing Type

- Standard Links

- Separate Payment

- Process Separate

- Recalculation Group

- Proration Group

Element Link Detail Workbook

The Element Link Detail workbook enables you to select a group of elements by effective date and classification. You refine your selection by specifying whether you want view elements that are available to all payrolls, or those elements that only available to some payrolls. When you have defined your subset of elements, you can see link details for each of them.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Business Questions

What are the costable types and costing codes for a group or elements?

Do these elements belong to a distribution set?

Are there any service criteria or age criteria for these elements?

Worksheets

Element Link Detail worksheet.

Parameters

You need to specify values for the following parameters:

- Effective Date

- Classification

- All Payrolls

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

- Element

- Processing Type

- Standard Links

- Link Status

- Payroll

- Job

- Organization

Employee Assignments Without Payroll Workbook

The employee assignments without payroll workbook enables you to identify those assignments that do not belong to a payroll. You can also view assignment status.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Business Questions

Is there a valid reason for these assignments not to belong to a payroll, or is there an error requiring correction?

Worksheets

Assignments Without Payroll worksheet.

Parameters

You need to specify values for the following parameters:

- Beginning Date

- Ending Date

Employee Assignments Not Processed Workbook

The employee assignments not processed workbook enables you to identify all assignments excluded from processing and view further detail such as employee name, assignment number and payroll.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Business Questions

Is there a valid reason for excluding these assignments from processing, or is there an error

requiring correction?

Worksheets

Assignments not Processed worksheet.

Parameters

You need to specify values for the following parameters:

- Beginning Date

- Ending Date

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

- Payroll

- Organization

- Location

- Government Reporting Entity (Hidden)

Employee Payment Methods Workbook

The employee payment methods workbook enables you to view payment method totals and run type totals from an effective date that you select.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Business Questions

Are the employee totals for this payment method as expected for the given period?

Did each run type produce the expected totals for this payment method, or is there a discrepancy requiring correction?

Worksheets

Employee Payment Methods worksheet.

Parameters

You need to specify values for the following parameters:

- Effective Date

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

- Payment Method

- Run Type

Organization Payment Methods Workbook

The organization payment methods workbook enables you to see summary information for each payment method from an effective date that you select. You can view third party details and source bank details.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Business Questions

Were payments correctly allocated for the duration of the reporting period?

What were the total payments for each payment type for the duration of the reporting period?

Worksheets

Organization Payment Methods worksheet.

Parameters

You need to specify values for the following parameters:

- Effective Date

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

- Payment Type

Payroll Message Workbook

The Payroll Message workbook enables you to view the total number of messages for each payroll process, payroll, and pay period.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

Business Questions

Was there an unusual number of messages for any particular process, payroll or pay period?

Were messages of the greatest severity level concentrated in any particular process, payroll or pay period?

Worksheets

Payroll Message worksheet.

Parameters

You need to specify values for the following parameters:

• Payroll Name

• Start Date

• End Date

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

• Process Type

• Severity Level

10

Learning Management Intelligence

Workforce Intelligence for Learning Management Key Concepts

Workforce Intelligence for Learning Management Overview

To use the Learning Management reports and workbooks, you must install both Oracle HRMS and Oracle Learning Management (OLM, formerly Oracle Training Administration).

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

The following key concepts enable you to accurately interpret the results of the reports in Learning Management:

Calculation of Training Event Hours

The Learning Management reports calculate the total number of hours employees have spent on training classes. For the reports to include a training class in calculations, the training class must:

- Have ended in the time period defined by the time parameters

- Have a status of Normal or Closed, if the class is scheduled

- Not have a status of cancelled

The reports calculate the hours spent on each training class and multiply them by the number of relevant employees who attended the course.

Because students can be internal or external, the reports use the enrollment status of Attended, rather than assignment budget values, to count employees.

Successful Hours

If a learner has successfully attended a class, the reports calculate the hours of the class using a predefined formula, then calculate the total number of successful hours for all relevant employees.

See: Amending the Default Training Hours, *Oracle HRMS Configuring, Reporting, and System Administration Guide* and Adding Additional Training Time Periods, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Calculation of Training Success

Most reports and workbooks calculate training success as the percentage of total training hours delivered for your employees against the number of those hours that were successful.

The Analytics workbooks, however, calculate training success as the percentage of successful students against the total number of attendees of a class.

Report data

The reports display employee job, grade, position, and organization as of the date the employee enrolled in the class. The reports do not show any updates to these values after enrollment, unless another enrollment occurs.

Scope of Training Success Reports

Training Success reports and workbooks include only employees who:

- Worked in the selected organization on the date they enrolled in the class.

- Have the class enrollment status of Attended.

- Have, on the enrollment date, an assignment that matches the parameters you select.

When you enroll an employee in a class, you record their assignment. The reports and workbooks use this assignment, even if the employee subsequently changed their assignment.

Training Success reports and workbooks include a class only if:

- An employee included in the report attended it.

- The class ended prior to the workbook end date.

- The class status is Normal or Closed.

- The class has not been cancelled.

If a training event runs over two time periods the reports count it only once, since the Training Success reports and workbooks use the class end date to count classes.

Workforce Intelligence for Learning Management

Discoverer Workbooks for Learning Management

Additional Information: See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

Delegate Chargeback (Training Center Hierarchy) Detail Workbook

This workbook investigates the amount transferred between two cost centers within an enterprise for internal training class enrollments.

Worksheets

This workbook has the following worksheet:

• Delegate Chargeback

Delegate Chargeback Worksheet

This worksheet investigates the amount transferred between two cost centers within an enterprise for internal training class enrollments.

Business Questions

What is the total amount transferred between two different organizations within an enterprise for an internal training class enrollment?

What is the total amount generated for a training organization by chargeback enrollments?

Parameters

You need to specify values for the following parameters:

• Class training center hierarchy

• Top class training center

• Date from

• Date to

Training Class Player Progress Status Workbook

This workbook investigates the progress of online classes.

Worksheets

This workbook has the following worksheets:

- By Total Time Taken Status

- By Player Status

- Completion Status

Workbook Calculations

The worksheets in this workbook use the following calculations:

- **Average Number of Modules Completed**

   Calculates the average number of modules that have been completed per training class.

- **Average Time Completed**

   Calculates the average time (in seconds) it takes delegates to reach the player status of Completed.

- **Average Time Failed**

   Calculates the average time (in seconds) it takes delegates to reach the player status of Failed.

- **Average Time Incomplete**

   Calculates the average time (in seconds) it takes delegates to reach the player status of Incomplete.

- **Average Time Passed**

   Calculates the average time (in seconds) it takes delegates to reach the player status of Passed.

- **Completed – Passed**

   Calculates the total number of delegates that have ether completed or passed the training class. The calculation includes delegates with a player status of Completed or Passed.

- **Not Completed**

  Calculates the total number of delegates that have not completed the training class. The calculation includes delegates with a player status of Not Attempted, Failed, or Incomplete.

- **Player Failed**

  Calculates the total number of delegates with a player status of Failed.

- **Player Incomplete**

  Calculates the total number of delegates with a player status of Incomplete.

- **Player Status Completed**

  Calculates the total number of delegates with a player status of Completed.

- **Player Status Not Attempted**

  Calculates the total number of delegates with a player status of Not Attempted.

- **Player Status Passed**

  Calculates the total number of delegates with a player status of Passed.

- **Time Completed**

  Calculates the total time (seconds) that delegates with a status of Completed have been playing content on the player.

- **Time Completed To Char**

  Converts the Average Time Completed value to the format HH:MM:SS.

- **Time Failed**

  Calculates the total time (seconds) that delegates with a status of Failed have been playing content on the player.

- **Time Failed To Char**

  Converts the Average Time Failed value to the format HH:MM:SS.

- **Time Incomplete**

  Calculates the total time (seconds) that delegates with a status of Incomplete have been playing content on the player.

- **Time Incomplete To Char**

  Converts the Average Time Incomplete value to the format HH:MM:SS.

- **Time Passed**

Calculates the total time (seconds) that delegates with a player status of Passed have been playing content on the player.

- **Time Passed To Char**

  Converts the Average Time Passed value to the format HH:MM:SS.

- **Total Enrollments**

  Calculates the total number of enrollments for each training class, based on a sum of Places Booked per Class.

By Total Time Taken Status Worksheet

This worksheet investigates the progress of your hosted online classes by the total time that delegates have been playing content of a course within the player.

Business Questions

Does one particular type of course take more time than the others to complete?

What are the average time taken and the average number of modules completed at each player status?

Parameters

You need to specify values for the following parameters:

- Course Name

- Class Name

- Class Start Date

- Class End Date

By Player Status Worksheet

This worksheet investigates the progress of your hosted training classes by the number of delegates at each Player Status. The Player Status categories are:

- Completed

- Passed

- Incomplete

- Not Attempted

- Failed

Business Questions

Does one particular type of course have higher number of delegates not completing or failing?

Parameters

You need to specify values for the following parameters:

- Course Name

- Class Name

- Class Start Date

- Class End Date

Completion Status Worksheet

This worksheet presents all relevant completion details for training classes.

Business Questions

Are a higher percentage of delegates failing a particular class or course?

Are all/some classes within one particular course complete?

What is the completion status of my training classes?

Parameters

You need to specify values for the following parameters:

- Course Name

- Class Name

- Class Start Date

- Class End Date

- Player Status

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Player Progress Detail Workbook

This workbook investigates the progress of individual delegates (learners) on your iLearning-hosted training classes.

> **Note:** This workbook reports only on the training classes transferred from iLearning through the OTA-iLearning integration. It does not include classes created in OTA or OLM.

Worksheets

This workbook has the following worksheets:

- By Total Time Taken Status

- By Player Status

Workbook Calculations

The worksheets in this workbook use the following calculation:

- **Player Status (Inserts Not Attempted)**

    Returns the status of Not Attempted for those delegates that have a Player Status of null.

By Total Time Taken Status Worksheet

This worksheet investigates the progress of individual delegates in your iLearning hosted training classes, by the total time they have been playing content using the iLearning player.

Business Questions

Are delegates spending a significant amount of time taking online training courses?

Are any of the delegates spending a significantly greater amount of time completing a training class than normal?

Parameters

You need to specify values for the following parameters:

- Course Name

- Class Name

- Class Start Date

- Class End Date

By Player Status Worksheet

This worksheet enables you to analyze the progress of delegates in your iLearning-hosted training classes by Player Status.

Business Questions

Are my delegates completing all of their training classes?

Are any of my delegates not progressing their training classes?

Which course has a particular delegate passed and/or failed?

Parameters

You need to specify values for the following parameters:

- Course Name

- Class Name

- Class Start Date

- Class End Date

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Training Class Resource Analysis Workbook

This workbook investigates the classes and resources available in the training organization.

Worksheets

This workbook has the following worksheets:

- Booked Resources per Class

- Class Enrollments

- Classes Without Trainer

- Classes Without Venue

- Overbooked Resources

- Required Resources Missing

- Resource Checklist

- Resource Schedule by Activity

- Suppliable Resources

- Training Classes

Booked Resources per Class Worksheet

This worksheet enables you to analyze the resources booked for specific training classes.

Business Questions

What are the resources booked for a specific class?

Parameters

You need to specify values for the following parameters:

- Class Start Date

- Class End Date

- Training center hierarchy

- Top training center

Class Enrollments Worksheet

This worksheet enables you to investigate the number of students who enroll in a class, and the number of students who successfully attend the class.

Business Questions

Who is enrolled on a specific class?

Parameters

You need to specify values for the following parameters:

- Class Start Date

- Class End Date

- Training center hierarchy

- Top training center

Classes Without Trainer Worksheet

This worksheet enables you to investigate the training classes that have no associated trainer.

Business Questions

Which training classes do not have a trainer booked?

Parameters

You need to specify values for the following parameters:

- Class from date

- Class to date

Classes Without Venue Worksheet

This worksheet enables you to investigate the training classes that have no associated venue.

Business Questions

Which training classes do not have a training location assigned to them?

Parameters

You need to specify values for the following parameters:

- Class from date

- Class to date

Overbooked Resources Worksheet

This worksheet enables you to analyze overbooked resources.

Business Questions

Which resources are booked more than once at the same time for different training classes?

Parameters

You need to specify values for the following parameters:

- Booked from

- Booked to

- Training center hierarchy

- Top training center

Required Resource Missing Worksheet

This worksheet enables you to investigate the resources that are required but have not been booked for a training class.

Business Questions

Which essential resources are not booked for a particular training course?

What required resources are missing?

Parameters

There are no parameters for this worksheet.

Resource Checklist Worksheet

This worksheet displays the list of resources required to successfully run a training course.

Business Questions

What is the minimum resource required to run a specific training course?

Parameters

You need to specify values for the following parameters:

- Course name

Resource Schedule by Activity (Course) Worksheet

This worksheet enables you to view the schedule for each training resource, to ensure that resources are not booked for more than one class at any one time.

Business Questions

At what level is a specific resource booked, for example, for the next 6 weeks?

What is the booking schedule for the available resources in the training organization?

Parameters

You need to specify values for the following parameters:

- Resource required from

- Resource required to

- Training center hierarchy

- Top training center

Suppliable Resource Worksheet

This worksheet enables you to analyze the cost and availability of suppliable resources for your training class.

Business Questions

What are the resources available within a training organization in a given period of time?

Parameters

You need to specify values for the following parameters:

- Resource from date

- Resource to date

Training Classes Worksheet

This worksheet enables you to investigate the location, start date, and duration of specific training classes.

Business Questions

Which training classes are scheduled classes with a class status of normal?

How many students are enrolled on a specific class, and how many free seats remain for that class?

What are the actual, budgeted and standard costs for running specific training classes?

For a specific training course, which training classes are running in a given period of time?

Parameters

You need to specify values for the following parameters:

- Class start date

- Class end date

- Category

- Training center hierarchy

- Top training center

Headings and Calculations

This worksheet uses the following calculation:

- **Class duration days**

  Calculates the number of days between the course start date and the course end date for the page item Class Duration.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Workforce Intelligence (HRMSi) for Learning Management

Training Class Ranking Status Workbook

This workbook investigates the popularity of training classes within a given period of time, by class days and attendance.

Worksheets

This workbook has the following worksheets:

- By Class Days

- By Attendance

By Class Days Worksheet

This worksheet enables you to investigate the popularity of training classes by ranking them by class days.

Business Questions

Which are the most popular classes by class days?

Which classes could be most profitable?

Parameters

You need to specify values for the following parameters:

- Class From Date

- Class To Date

Headings and Calculations

This worksheet contains the following column:

- **Free Seats**

  Values in this column are based on the Maximum Attendees minus Student Count. The calculation takes into account the number of canceled internal students as well as the number of canceled external students.

By Attendance Worksheet

This worksheet enables you to analyze the popularity of training classes by ranking them by course attendance.

Business Questions

Which are the most popular classes by attendance?

Which classes are in high demand?

Parameters

You need to specify values for the following parameters:

- Class From Date

- Class To Date

Headings and Calculations

This worksheet contains the following column:

- **Free Seats**

   Values in this column are based on the Maximum Attendees minus Student Count. The calculation takes into account the number of canceled internal students as well as the number of canceled external students.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Student Training Success (External Students) Analysis Workbook

This workbook investigates the training success ratio for external learners (students not employed by the organization running the training). If the SUCCESSFUL_ATTENDANCE_FLAG column of the OTA_DELEGATE_BOOKING table in the OTA schema is set to Yes, that enrollment is considered successful.

Worksheets

This workbook includes the following worksheets:

- By Company

- By Company and Year

Key Concepts

These worksheets use classes to calculate success. For a class to be included it must:

- Have an end date prior to the present date.

- Have a status of Normal or Closed, if the class is scheduled.

- Not be Canceled.

The hours of a class are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of classes, you may need to customize this formula. See Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in OLM and HRMS, the Student Training Success (External Students) Analysis workbook calculates the following:

- **Hours Delivered**

  The total number of training hours of all the relevant classes multiplied by the number of places filled by students on these classes.

- **Successful Hours**

  If a student is recorded as successfully having attended the class, then the employee's hours for this class are recorded as successful hours.

  In the workbook, the successful hours are the total number of successful hours for all relevant classes.

- **Success Rate Percentage**

  Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Company Worksheet

This worksheet enables you to analyze the success of training hours delivered to external students for a company. You can investigate this for a business group and year.

Business Questions

What is the student success ratio for a particular company (or customer)?

Which company has the highest training success ratio?

Parameters

This worksheet has no parameters.

By Company and Year Worksheet

This worksheet enables you to analyze the success of training hours delivered to external students for a company, for different years. You can investigate this for a business group and each company.

Business Questions

In which training year did a particular customer have the highest student success ratio?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Student Training Success (Internal Students) Analysis Workbook

This workbook investigates the training success ratio for internal students (students employed by the organization running the training).

Success ratio is calculated as the number of successful training hours delivered to internal students divided by the total number of training hours delivered to internal students. The number of successful training hours per class is the number of successful internal students enrolled for a class, multiplied by the course duration in days for that class.

The total number of training hours delivered to internal students for a class is the total number of internal students enrolled for a class, multiplied by the course duration in days for that class.

If the SUCCESSFUL_ATTENDANCE_FLAG column of the OTA_DELEGATE_BOOKING table in the OTA schema is set to Yes, that enrollment is considered successful.

Worksheets

This workbook includes the following worksheets:

- By Organization and Year

- By Location and Year

- By Job Category and Year

- By Job and Year

• Attendance Summary

Key Concepts

These worksheets use classes to calculate success. For a class to be included it must:

• Have an end date prior to the present date.

• Have a status of Normal or Closed, if the class is scheduled.

• Not be Cancelled.

The hours of a class are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of classes, you may need to customize this formula. See Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in OLM and HRMS, the Student Training Success (Internal Students) Analysis workbook calculates the following:

• **Hours Offered**

  The total number of training hours for all relevant classes multiplied by the number of places available in all relevant classes.

• **Hours Delivered**

  The total number of training hours of all the relevant classes multiplied by the number of places filled by students in these classes.

• **Hours Received**

  The total number of training hours employees have attended for all relevant training classes.

• **Successful Hours**

  If a student is recorded as successfully having attended the class, then the employee's hours for this class are recorded as successful hours.

  In the workbook, the successful hours are the total number of successful hours for all relevant classes.

• **Utilization %**

  The total hours delivered as a percentage of the hours offered. For example, if 5 hours were delivered, and 10 hours were offered, then the utilization percentage would be 50%.

• **Success Rate %**

  Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate

would be 80%.

By Organization and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students each year, and the success of these hours. You can investigate student success rates for a business group and organization within your enterprise.

Business Questions

What is the training success rate of an organization over a given period of time?

In which year did an organization have highest training success rate?

Parameters

This worksheet has no parameters.

By Location and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students for a location each year, and the success of these hours. You can investigate student success rates for a business group and organization within your enterprise.

Business Questions

What is the training success rate for a training location over a given period of time?

In which training year did a particular training location have the highest training success rate?

Parameters

This worksheet has no parameters.

By Job Category and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students each year for a job by category, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Business Questions

What is the training success rate for a job category over a given period of time?

In which training year was the success rate highest for a particular job category?

Parameters

This worksheet has no parameters.

By Job and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students for a job by year, and the success of these hours. You can investigate student success rates for a business group and organization within your enterprise.

Business Questions

What is the training success rate for a job over a given period of time?

In which year did a job have the highest training success rate?

Parameters

This worksheet has no parameters.

Attendance Summary Worksheet

This worksheet enables you to analyze the number of internal students attending training classes. You can view internal student attendance by activity type, analyze success rates and information about failures.

Business Questions

How successful are my courses?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Training Cost and Revenue Analysis Workbook

This workbook investigates the costs involved in running training activities (courses), and indicates the revenue generated by these events (classes). It analyzes costs and revenue information by training course, sponsoring organization, training center, training category and competence.

Worksheets

This workbook has the following worksheets:

- By Training Course

- Training Course by Year

- By Sponsoring Organization

- Sponsoring Organization by Year

- By Training Center

- Training Center by Year

- By Training Category

- Training Category by Year

- By Competence

- By Competence and Year

Headings and Calculations

This workbook uses the following headings and calculations:

Currency of Results

Within OLM you can enter your costs in any currency you have set up, so that the worksheets all report in the same currency. HRMSi converts the results into the base currency of the business group.

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

Budget Cost

Budget costs are calculated using the costs of scheduled events (classes). The budget costs for scheduled events (classes) are taken from the budget cost entered in the OLM Class page.

Actual Cost

Actual costs are taken as the actual cost of the scheduled event (class), entered in the OLM Class page, and the cost of resources booked for the event (class).

For the cost of a resource to be included, it must be confirmed and associated with the

event (class). Enter the cost for one resource per day. The cost is then multiplied by the quantity of resource required, and number of days.

The actual cost of an event (class) is the actual cost plus the cost of all resources for the event (class).

Actual Revenue

Actual revenue is the sum of internal and external revenue for each scheduled event (class). Internal revenue is calculated using the internal enrollments for a scheduled event (class).

Internal enrollments are entered in the Enrollment Details window using the organization type. For the enrollment to be included, it must have a status of Attended.

> **Note:** The workbook does not use the Internal check box on the Enrollment page.

The number of places for all internal enrollments are then added together. This is then multiplied by the price basis amount for the event (class).

External revenue is calculated using all the external enrollments for a scheduled event (class). For the enrollment to be included, it must have a status of Attended.

External enrollments are linked to a finance line, which includes the cost of the enrollment. For a finance line to be included, it must be of the type Enrollment and must not be cancelled.

The total external revenue is the sum of the finance line amounts, summed over all the external bookings.

Students Enrolled

The total number of external students enrolled, added to the total number of internal students enrolled.

Cost per Student

The actual cost divided by the students enrolled.

Revenue per Student

The actual revenue divided by the students enrolled.

Hours Offered

The total number of training hours for all relevant events (classes) multiplied by the number of places available on these events (classes).

Hours Delivered

The total number of training hours for all relevant events (classes), multiplied by the number of places filled by students on these events (classes).

Cost per Hour

The actual costs divided by the hours delivered.

By Training Course Worksheet

This worksheet enables you to analyze the cost and revenue generated by training events (classes). You can investigate training activities for a specific Business Group, sponsoring organization and year.

Business Questions

What are the costs involved in running training events (classes) by course?

How much revenue is generated by these training events (classes), every year?

Parameters

This worksheet does not use parameters.

Training Course by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities for different years, by business group and sponsoring organization.

Business Questions

What are the costs involved in running a training course?

How much revenue is generated by this course each year?

Parameters

This worksheet does not use parameters.

By Sponsoring Organization Worksheet

This worksheet enables you to analyze the cost and revenue of training events (classes) for different organizations, by business group and year.

Business Questions

For each sponsoring organization, what are the actual and budgeted training costs?

How much revenue is generated during a year?

Parameters

This worksheet does not use parameters.

Sponsoring Organization by Year Worksheet

This worksheet enables you to analyze the costs and revenue associated with training for different years. You can investigate costs and revenue for a Business Group and sponsoring organization.

Business Questions

What are the training costs and revenues generated for a sponsoring organization by training year?

Parameters

This worksheet does not use parameters.

By Training Center Worksheet

This worksheet enables you to analyze the costs and revenue of a training event (classes) for a training center, by business group, sponsoring organization and year.

Business Questions

What are the actual and budgeted training costs for each training center?

How much revenue is generated by each training center by year?

Parameters

You need to specify values for the following parameters:

- Event Training Center Hierarchy

- Top Event Training Center

Training Center by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities for different years. You can investigate by business group, sponsoring organization, and training center.

Business Questions

For each training center, what are the actual and budgeted training costs?

How much revenue is generated for a sponsoring organization by training year?

Parameters

You need to specify values for the following parameters:

- Event Training Center Hierarchy

- Top Event Training Center

By Training Category Worksheet

This worksheet enables you to analyze the cost and revenue of training events (classes) for a training category. You can investigate costs and revenue for a business group, sponsoring organization, and year.

Business Questions

What are the costs involved in running training events (classes) by category?

How much revenue is generated by each category?

Parameters

This worksheet does not use parameters.

Training Category by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training events (classes) in different years. You can investigate costs and revenue for a business group, sponsoring organization, and training category.

Business Questions

What are the costs involved in running training events (classes) for a training category by year?

How much revenue is generated by training events (classes) for a training category by year?

Parameters

This worksheet does not use parameters.

By Competence Worksheet

This worksheet enables you to analyze the cost and revenue of training activities by the competence achieved if a student successfully completes the course.

Business Questions

What are the costs involved in running training events (classes) by year for a training competence?

How much revenue is generated by training events (classes) by year for a training competence?

Parameters

This worksheet does not use parameters.

By Competence and Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities by competence and year.

Business Questions

What are the costs involved in running training events (classes) for a training competence by year?

Tell me how much revenue is generated by running training events (classes) for a training competence by year.

Parameters

This worksheet does not use parameters.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Training Course Ranking by Amount Status Workbook

This workbook investigates the total amount of money generated by enrollments in each training class, and allows training classes to be ranked by the enrollment amount generated.

Enrollments for a course may occur using a variety of currencies. The Course Ranking by Amount Workbook can convert foreign currencies to a common currency for reporting purposes. Currencies are converted using exchange rates maintained in a general ledger application.

Enrollments are possible through both OLM and Order Management (OM). This workbook reports on enrollments from both systems to produce a total enrollment amount for each class.

Worksheets

This workbook includes the following worksheet:

- Course Ranking by Amount

Business Questions

Which is the most profitable training class?

Which is the least profitable training class?

What is the total enrollment amount generated within a given period of time?

Parameters

You must specify values for some of the following parameters:

- Category

- Class start date

- Class end date

- Reporting currency

- Exchange rate

- Training class status

- Order header status

- Order line status

- Training center hierarchy

- Top training center

Worksheet Calculations

The worksheet uses the following calculations:

- **Class days**

  Calculates the page item Class Days, based on the Class Duration in days multiplied by the total number of enrollments.

- **Class days – internal**

Calculates the page item, Class Days--Internal, based on a sum of Total Internal Enrollments multiplied by the Class Duration.

- **Class days – external**

  Calculates the page item, Class Days--External, based on a sum of Total External Enrollments multiplied by the Class Duration.

- **Class duration**

  Calculates the page item, Class Duration, based on the number of days between the Class Start Date and Class End Date.

- **Reporting currency**

  Populates the Reporting Currency column with the currency code for the currency being used.

- **Total amount per class**

  Populates the page item Total Amount per Class with the sum of Amount per Class.

- **Total attended amount**

  Calculates the page item Total Non Attended Amount, based on a sum of Total Amount where the booking status is equal to Attended.

- **Total enrollments**

  Calculates the total number of enrollments for each iLearning training class, based on a sum of Places Booked per Class.

- **Total external enrollments**

  Populates the variable Total External Enrollments, based on a sum of Places Booked for external bookings only.

- **Total internal booking amount**

  Populates the page item Total Internal Booking Amount, based on a sum of Internal Booking Amount per Class.

- **Total internal enrollments**

  Populates the variable Total Internal Enrollments, based on a sum of Places Booked for internal bookings only.

- **Total non-attended amount**

  Calculates the page item Total Non Attended Amount, based on a sum of Total Amount where the enrollment status is not equal to Attended.

- **Total OM amount per class**

Calculates the page item, Total OM Amount per Class, based on a sum of OM Amount per Class.

- **Total OTA amount per class**

    Calculates the page item, Total OTA Amount per Class, based on a sum of OTA Amount per Class.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Training Success Workbook

This workbook investigates the time utilization and success rate of training classes.

To calculate the time utilization of the training classes, the report divides the total number of students confirmed in the class by the maximum number of students allowed to enroll in the class.

To calculate the success rate of the training class the report divides the total number of successful students by the total number of students confirmed in the class.

Worksheets

This workbook includes the following worksheets:

- By Sponsoring Organization

- By Sponsor Organization and Year

- By Training Course

- By Training Course and Year

- By Training Center

- By Training Center and Year

- By Training Category

- By Training Category and Year

- By Competence

- By Competence and Year

Headings and Calculations

The workbook uses the following calculations:

- **Success Rate**

  Success rate is calculated as a number of successful training hours delivered to external students divided by the total number of training hours delivered to external students, where:

  - The number of successful training hours per class is the number of successful external students enrolled, multiplied by the class duration.

  - The total number of training hours delivered to external students for a class is the total number of external students enrolled in the class, multiplied by the class duration in hours.

- **Successful Hours**

  This calculation is based on the number of Training Hours multiplied by the number of successful students.

- **Utilization**

  This calculation is based on the Training Hours Delivered divided by the Training Hours Offered.

- **Hours Delivered**

  This calculation is based on the number of training hours required by the class multiplied by the number of enrolled students.

- **Hours Offered**

  This calculation is based on the number of training hours required by the class multiplied by the maximum number of attendees.

Key Concepts

These worksheets use classes to calculate success. For a class to be included it must:

- Have an end date prior to the present date.

- Have a status of Normal or Closed, if the class is scheduled.

- Not be Cancelled.

The hours of a class are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of classes, you may need to customize this formula. See Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in OLM and HRMS, the Training Success workbook calculates the following:

- **Hours Offered**

  The total number of training hours for all relevant classes multiplied by the number of places available in all relevant classes.

- **Hours Delivered**

  The total number of training hours of all the relevant classes multiplied by the number of places filled by students in these classes.

- **Hours Received**

  The total number of training hours employees have attended for all relevant training classes.

- **Successful Hours**

  If a student is recorded as successfully having attended the class, then the employee's hours for this class are recorded as successful hours.

  In the workbook, the successful hours are the total number of successful hours for all relevant classes.

- **Utilization %**

  The total hours delivered as a percentage of the hours offered. For example, if 5 hours were delivered, and 10 hours were offered, then the utilization percentage would be 50%.

- **Success Rate %**

  Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Sponsoring Organization Worksheet

This worksheet enables you to investigate the training success rate of training classes for different sponsoring organizations.

Business Questions

What is the training utilization rate by sponsoring organization for a year?

What is the training success rate by sponsoring organization for a year?

Parameters

This worksheet has no parameters.

By Sponsoring Organization and Year Worksheet

This worksheet enables you to investigate the training success rate of training classes for a sponsoring organization for each year.

Business Questions

What is the training utilization rate for a sponsoring organization by year?

What is the training success rate by sponsoring organization by year?

Parameters

This worksheet has no parameters.

By Training Course Worksheet

This worksheet enables you to investigate the success rate of different training courses. You can investigate courses by year and sponsoring organization.

Business Questions

What is the training utilization rate by training course for a year?

What is the training success rate by training course for a year?

Parameters

This worksheet has no parameters.

By Training Course and Year Worksheet

This worksheet enables you to investigate the success rate of courses each year. You can investigate courses by business group and course.

Business Questions

What is the training utilization rate for a training course by year?

What is the training success rate for a training course by year?

Parameters

This worksheet has no parameters.

By Training Center Worksheet

This worksheet enables you to investigate the training success rate of different training centers, by business group and year.

Business Questions

What is the training utilization rate by training center for a class year?

What is the training success rate by training center for a class year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy

- Top training center

By Training Center and Year Worksheet

This worksheet enables you to investigate the training success rate of a training center over a number of years. You can analyze success by business group and training center.

Business Questions

What is the training utilization rate for a training center by training year

What is the training success rate for a training center by training year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy

- Top training center

By Training Category Worksheet

This worksheet enables you to investigate the training success rate of classes by training category. You can investigate different training categories for a business group and year.

Business Questions

What is the training utilization rate by training category for a training year?

What is the training success rate by training category for a training year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy

- Top training center

By Training Category and Year Worksheet

This worksheet enables you to investigate the training success rate of a training class in different years. You can analyze training success for a business group and training category.

Business Questions

What is the training utilization rate for a training category by year?

What is the training success rate for a training category by year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy

- Top training center

By Competence Worksheet

This worksheet enables you to investigate the success rate of a training course by competencies. You can investigate competencies for a sponsoring organization and year.

Business Questions

What is the training utilization rate by training competency for a class year?

What is the training success rate by training competency for a class year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy

- Top training center

By Competence and Year Worksheet

This worksheet enables you to investigate the training success rate of training activities for a competence over a number of years. You can investigate a competence for each sponsoring organization.

Business Questions

What is the training utilization rate for a training competence by class year?

What is the training success rate for a training competence by class year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy

- Top training center

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Employee Training Attendance Success (Organization Hierarchy) Status Analytics Workbook

The Training Success (Organization Hierarchy) Status Analytics workbook investigates how successfully employees in different organizations and geographical areas are attending training courses.

Business Questions

How successful is employee training across different organizations or geographical areas?

Which organization is the most successful at training?

Which geographical area is the least successful at training?

Parameters

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

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Area (Geography)

- Country (Geography)

- Region (Geography)

- Location (Geography)

- Job Category

- Job Name

- Grade Name

- Position Name

Worksheets

This workbook has the following worksheets:

- By Organization

- By Geography Area

The worksheets display one row for each grouping. For example, the By Organization worksheet displays one row per organization.

Headings and Calculations

All worksheets contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet; for example, in the By Organization worksheet, the heading is Organization.

- **Attendees**

  The number of attendees on training courses for each group.

- **Successful Attendees**

  The number of successful attendees of training courses for each group.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Employee Training Attendance Success (Organization Hierarchy) Trend Analytics Workbook

The Training Success (Organization Hierarchy) Trend Analytics workbook investigates how successfully employees are attending training courses over time.

Business Questions

Is the training in my enterprise become more or less successful over time?

Parameters

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

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Area (Geography)

- Country (Geography)

- Region (Geography)

- Location (Geography)

- Job Category

- Job Name

- Grade Name

- Position Name

Worksheets

This workbook has the following worksheets:

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

The worksheets display one row for each time period. For example, the By Month worksheet displays one row per month.

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **A time period column**

  The heading depends on the selected worksheet; for example, in the by Year worksheet, this column heading is Year.

- **Attendees**

  The number of attendees of training courses for each time period.

- **Successful Attendees**

  The number of successful attendees of training courses for each time period.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Employee Training Attendance Success (Organization Hierarchy) Template Analytics Workbook

The Employee Training Attendance Success (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating training success

over yearly periods, the other providing a detailed analysis of training success in the workforce. These worksheets help you to create reports to analyze the success of your training courses. Training success is defined as the percentage of training courses that are successfully completed.

Parameters

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

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Area (Geography)

- Country (Geography)

- Region (Geography)

- Location (Geography)

- Job Category

- Job Name

- Grade Name

- Position Name

Worksheets

This workbook includes the following worksheets:

- By Year

- By Detail

By Year Worksheet

The By Year worksheet enables you to see training success for each year.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **Year**

  The time period for which this worksheet is run.

- **Attendees**

  The number of attendees on training courses for each group.

- **Successful Attendees**

  The number of successful attendees on training courses for each group.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

Detail Worksheet

The Detail worksheet calculates the training success rates for training classes with the same start and end dates, for attendees in each organization, location, job, grade, and position.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Training Class Start Date**

  The date the class started.

- **Training Class End Date**

  The date the class ended.

- **Attendees**

  The number of attendees of classes with the same start and end dates, who are in the same organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Successful Attendees**

  The number of attendees successfully completing the training class, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

- **Organization**

  The organization of the attendees.

- **Location**

  The location of the attendees.

- **Job**

  The job held by the attendees.

- **Grade**

  The grade held by the attendees.

- **Position**

  The position of the attendees.

Related Topics

Workforce Intelligence for Learning Management Overview, page 10-2

Glossary

360-Degree Appraisal

Part of the Performance Management 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-31

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.

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.

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.

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-32

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-30

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-33, *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-10

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-34

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.

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 Category

A group of compensation items. Compensation Categories determine the type of compensation that you award under a plan.

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-40

Competency Assessment Template

The entity that configures the Competencies section of an appraisal.

See also: *Objective Assessment Template*, page Glossary-25

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-11

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.

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

> **Additional Information:** 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-29 is current if their most recent placement start date is on or before the effective date, and either the contingent worker does not have a placement end date for their latest placement or their placement end date is later than the effective date.

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

Database Item

An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

Date Earned

The date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed.

Date Paid

The effective date of a payroll run. Date paid dictates which tax rules apply and which tax period or tax year deductions are reported.

Date To and Date From

These fields are used in windows not subject to DateTrack. The period you enter in

these fields remains fixed until you change the values in either field.

See also: *DateTrack*, page Glossary-14, *Effective Date*, page Glossary-15

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-15

Default Postings

(iRecruitment) Default text stored against business groups, organizations, jobs, and/or positions. The default postings are used to create job postings for a vacancy.

Dependent

In a benefit plan, a person with a proven relationship to the primary participant whom the participant designates to receive coverage based on the terms of the plan.

Deployment

The temporary or permanent employment of an employee in a business group.

See also: *Secondment*, page Glossary-36

Deployment Factors

See: *Work Choices*, page Glossary-42

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

Deviation

A change to the standard approver list is a deviation.

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.

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1.*

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-33, *Nonrecurring Elements*, page Glossary-25

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.

Eligibility Profile

A set of eligibility criteria grouped together. Eligibility profiles help determine eligibility for compensation and benefits and are re-usable. Eligibility profiles can be linked to a compensation object (such as a program, plan, or option), a collective agreement, a grade ladder, or a work schedule to restrict eligibility for these.

Employee

A worker who has a direct employment relationship with the employer. Employees are typically paid compensation and benefits via the employer's payroll application.

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

Employee Histories

An SSHR function for an employee to view their Learning History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

Employment Category

A component of the employee assignment. Four categories are defined: Full Time - Regular, Full Time - Temporary, Part Time - Regular, and Part Time - Temporary.

Employment Equity Occupational Groups (EEOG)

In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

Employment Insurance (EI)

Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

Employment Insurance Rate

In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

Enrollment Action Type

Any action required to complete enrollment or de-enrollment in a benefit.

Entitlement

In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

ESS

Employee Self Service. A predefined SSHR responsibility.

Event

An activity such as a training day, review, or meeting, for employees or applicants. Known as *class* in OLM.

Ex-Applicant

Someone who has previously applied for a vacancy or multiple vacancies, but all applications have ended, either because the applicant has withdrawn interest or they

have been rejected. Ex-Applicants can still be registered users.

Expected Week of Childbirth (EWC)

In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of childbirth is used in the calculations for Statutory Maternity Pay (SMP).

Extra Information Type (EIT)

A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country.

See also: *Developer Descriptive Flexfield*, page Glossary-14

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-33

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-33, *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-27

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-19

Grandfathered

A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

Group

A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

Group Certificate

In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year..

Headcount(HEAD)

A Workforce Measurement Type (WMT) that measures headcount. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Hierarchy

An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

High Availability

iRecruitment functionality that enables enterprises to switch between two instances to continuously support the candidate job site.

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

In Oracle HRMS, the term Incumbent refers to an active worker (employee or

contingent worker).

Individual Compensation Distribution

A tool that enables managers assign one-time or recurring awards, bonuses, and allowances to qualified employees such as housing allowances, spot bonuses, and company cars. Also enables employees to enter voluntary contributions, such as savings plans, charitable organizations, and company perquisites.

Info Online

A generic framework to integrate Oracle applications with partner applications, enabling users to access information from third-party providers, My Oracle Support (formerly MetaLink) and Learning Management.

Initiator

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.

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-14

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.

Manager-Employee Appraisal

Part of the 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-33

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.

Options

A level of coverage for a participant's election, such as Employee Only for a medical plan, or 2x Salary for a life insurance plan.

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.

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-19

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 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 then the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period of Placement

The period of time a contingent worker spends working for an 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.

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-10

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-27

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-37

Qualifying Week

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen

weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number

In Canada, this is the employer's account number with the Ministere du Revenu du Quebec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire

A 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-5

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 Service 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-25, *Standard Link*, page Glossary-38

Recruiting Area

A recruiting area consists of a set of countries, business groups, and locations. Define recruiting areas using the Generic Hierarchy function of Oracle HRMS. In iRecruitment, when managers create vacancies, they can select multiple locations as vacancy locations using recruiting areas.

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-10

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.

Reporting Group

A collection of programs and plans that you group together for reporting purposes, such as for administrative use or to meet regulatory requirements.

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-34

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-8

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-36, *User Profile Options*, page Glossary-41, *Request Groups*, page Glossary-34, *Security Groups*, page Glossary-34

Resume

A document that describes the experience and qualifications of a candidate.

RetroPay

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

Retry

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

Revenue Canada

Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministere du Revenu du Quebec.

Reversal

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

Reviewer (SSHR)

A person invited by an appraising manager to add review comments to an appraisal.

RIA

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

Rollback

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

Rollup

An aggregate of data that includes subsidiary totals.

Run Item

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

Salary Basis

The period of time for which an employee's salary is quoted, such as hourly or

annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

Salary Rate

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

Scheduled Enrollment

A benefits plan enrollment that takes place during a predefined enrollment period. Scheduled enrollments can be administrative, or open.

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 groupsenable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-34, *Security Profile*, page Glossary-36, *User Profile Options*, page Glossary-41

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-34

Self Appraisal

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

Separation Category

Separation category groups the leaving reasons. HRMS*i* refers to Termination Category as Separation Category.

See also: *termination category*, page Glossary-39

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-38

Social Insurance Number (SIN)

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

Source Deductions Return (TP 1015.3)

A Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

SSHR

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP

See: *Statutory Sick Pay*, page Glossary-38

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-33

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

A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

Statement of Remuneration and Expenses (TD1X)

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

Statutory Maternity Pay

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Statutory Sick Pay

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption

(SPPA).

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.

HRMSi elsewhere refers to Termination Category as Separation Category.

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.

Transcentive

A third-party compensation management solutions provider, that provides additional information about benefits choices.

Unit Standard

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

Unit Standard 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-34, *Security Profile*, page Glossary-36

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 Workers' 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-16 or a contingent worker, page Glossary-11

Workers' 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. Workers' 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.

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