Oracle® Transactional Business Intelligence
Enterprise for Human Capital Management Cloud Service
Reporting and Analytics for Business Users
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Explains how to use Oracle HCM Cloud historical reports and dashboards to answer common business questions.
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Oracle Transactional Business Intelligence Enterprise for Human Capital Management Cloud Service provides advanced analytics for a comprehensive view of your human resources. It is designed to support executives, managers and analysts with strategic planning, forecasting, problem solving and other types of detailed analytics.

**Audience**

This document is intended for business users who want to use Oracle Transactional Business Intelligence Enterprise for Human Capital Management Cloud Service reports to answer common human resources questions.

**Documentation Accessibility**

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

**Access to Oracle Support**

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

**Related Documents**

For more information, see the following documents in the Oracle Transactional Business Intelligence Enterprise for Human Capital Management Cloud Service documentation set:

- Human Resources – Compensation Subject Area Guide
- Human Resources – Payroll Subject Area Guide
- Human Resources – Workforce Deployment Subject Area Guide
- Human Resources – Workforce Frozen Snapshots Subject Area Guide
- Human Resources – Workforce Gains and Losses Subject Area Guide
Conventions

The following text conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td>italic</td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
Evaluating Global Workforce Health

This tutorial shows you how to evaluate the overall health of your workforce.
You want to see a high level view of how well your workforce is doing for a particular month as well as trends over the past 12 months.
Use the sparkline tiles and reports in the HR Executive Dashboard — Global Workforce Health Summary page to help you determine the overall health of your workforce.

To view the HR Executive Dashboard — Global Workforce Health Summary page:
1. Launch the OTBI Enterprise for Human Capital Management Cloud Service URL provided by your administrator.
2. From the Dashboards menu, expand Human Capital Management, and then select HR Executive Dashboard.

The HR Executive Dashboard — Global Workforce Health Summary page is displayed.
How do I read the Global Workforce Health Sparkline Tiles?

The Global Workforce Health sparkline tiles enable you to quickly assess key overall workforce health metrics.

The numbers within the tiles display the current data for the month you select in the Time dashboard prompt list. The sparkline graphs display data for the 12 months prior to the month you select.

This sparkline contains the following tiles:

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Note: Whenever departments are displayed in graphs in OTBI Enterprise for HCM Cloud Service, you can select the department element or name in the graph to drill down to view that department in detail. On the organization detail page, you can explore the selected department and its child departments in detail, or select the Back to Global Summary link to return to the top-level company view.

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3. In the left pane on the dashboard page, verify that the Department Hierarchy and Hierarchy Version dashboard prompt list values are set correctly. This step ensures that the data displayed on the page is accurate.

If you are uncertain which values to select, consult with your OTBI Enterprise for HCM Cloud Service implementer or administrator. Your implementer or administrator can set these values to default to the correct selections.
How do I read the Headcount Report?

The following image shows an example of the Headcount report with headcount growth metrics displayed. The boxes in the treemap represent departments within the hierarchy. The size and color of the boxes indicate the relative magnitude of the selected metric. The visual properties of this treemap enable you to see, at a glance, how your departments compare to each other.

In this example, it looks like the Vision Corporation has the highest headcount growth rates at 3%. This information helps you to understand which organizations within the company are growing rapidly, and which ones may be declining in headcount.

You can change the perspective of the data displayed in the report by selecting one of the following view types in the View list:

- **Headcount** — Total number of employees, including contingent, temporary, and inactive employees.
- **Gains** — New hires as a percentage of the total workforce.
- **Attrition** — Percentage of employees that are in terminated status.
- **Top Performer Attrition** — Percentage of terminated employees that were also classified as top performers.
- **Open Requisitions** — Total number of open requisitions. This value requires integration to Taleo Recruiting, or external recruiting data loads.
- **Workforce Cost** — Total payroll balance amount. This value requires integration to Oracle Fusion Payroll or external payroll data loads.

With these metrics, you can see that your workforce is growing, with little attrition, but you have over 300 open positions. You can use this information to work with your recruiters to create a strategy to fill these positions quickly.
How do I read the Headcount Report?

- **Headcount Growth** — Employees hired and deployed.
- **Attrition Rate** — Employee turnover rate.
- **Voluntary Attrition Rate** — Employee voluntary turnover rate.
- **New Hires** — New hire employee count.
- **Open Requisitions** — Total number of open requisitions. This value requires integration to Taleo Recruiting, or external recruiting data loads.
- **Payroll Cost Per Employee** — Payroll balance amounts per employee.

You can optionally click the **Show data** link at the bottom of the report to display the treemap in a detailed table format as shown in the following image.

![Treemap Example](image)

To drill down for more details on a department:

1. Click in a department box, or on a department heading label in the treemap, and select **Explore this Department** to drill down into the department details.

![Explore Department](image)

The image below shows an example of a drill down into the detailed headcount metrics for the Vision Corporation department. After drilling down to the next lower department in the hierarchy, you can analyze the department and its child departments by the same topics you work with at the global corporate level. This enables you to identify opportunities and issues at the lower levels of the organization.
2. Click the Back to Global Summary link to return to the Global Workforce Health Summary page or continue to analyze this department level by the topics displayed in the tabs at the top of the HR Executive Dashboard.

How do I read the Five-Year Trends Report?

The following image shows an example of the Five-Year Trends report which displays key workforce trends over the last five years.

In this example, it looks like the overall headcount rates are flat, attrition is down, and your hiring rates are low. You can use this information to get a broader view of your workforce health over the last five years and provide context to strategic planning activities and discussions.

The report contains the following trend metrics:

- **Headcount** — Percentage of employees deployed.
- **Attrition** — Percentage of terminated employees segmented by top performers and all other employees.
- **Open Requisitions and Hires** — Number of open requisitions and hires.
- **Workforce Costs** — Payroll balance amount.
Evaluating Headcount

This tutorial shows you how to view and evaluate headcount. You want to see a high level view of headcount gains, losses, and change for a particular month as well as trends over the past 12 months.

Use the sparkline tiles and reports in the HR Executive Dashboard — Global Headcount Overview page to help you plan your headcount and anticipate workforce trends.

To view the HR Executive Dashboard — Global Headcount Overview page:

1. Launch the OTBI Enterprise for Human Capital Management Cloud Service URL provided by your administrator.

2. From the Dashboards menu, expand Human Capital Management, and then select HR Executive Dashboard.

The HR Executive Dashboard — Global Workforce Health Summary page is displayed.
3. In the left pane on the dashboard page, verify that the Department Hierarchy and Hierarchy Version dashboard prompt list values are set correctly. This step ensures that the data displayed on the HR Executive Dashboard is accurate.

If you are uncertain which values to select, consult with your OTBI Enterprise for HCM Cloud Service implementer or administrator. Your implementer or administrator can set these values to default to the correct selections.

4. Select the **Headcount Overview** tab to display the HR Executive Dashboard — Global Headcount Overview page.
How do I read the Global Headcount Overview Sparkline Tiles?

The Global Headcount Overview sparkline tiles enable you to quickly assess key headcount metrics. The numbers within the tiles display the current data for the month you select in the Time dashboard prompt list. The sparkline graphs display data for the 12 months prior to the month you select.

This sparkline contains the following tiles:

- **Headcount** — Total number of employees, including contingent, temporary, and inactive employees.
- **Gains** — New hires as a percentage of the total workforce.
- **Attrition** — Percentage of employees that are in terminated status.
- **Top Performer Attrition** — Percentage of terminated employees that were also classified as top performers.
- **Voluntary Attrition** — Total number of employee resignations.
- **Open Requisitions** — Total number of open requisitions. This value requires integration to Taleo Recruiting, or external recruiting data loads.

Note: Whenever departments are displayed in graphs in OTBI Enterprise for HCM Cloud Service, you can select the department element or name in the graph to drill down to view that department in detail. On the organization detail page, you can explore the selected department and its child departments in detail, or select the Back to Global Summary link to return to the top-level company view.
With these metrics, you can see that your headcount change percentages are fairly flat, but you have over 300 open positions. You can use these metrics to formulate a strategy to hire new talent.

How do I read the Headcount Total and Change Report?

The following image shows an example of the Headcount Total and Change report metrics displayed by worker type.

In this example, you can see that most of your headcount is classified as employees. The Vision Corporation department comprises the largest proportion of growth, including what may be growth in contingent workers. You can use this information to determine which organizations are growing rapidly, and which ones may need further support from the HR organization to assist with employee development and strategic planning.

You can change the perspective of the data displayed in the report by selecting one of the following view types in the View list:

- **All Values** — All headcount.
- **Performance Band** — Headcount by performance band.
- **Worker Type** — Headcount by worker classification.
- **Job Family** — Headcount by job category.

To drill down for more details on a department:

1. Click in a bar, or on a bar heading label in either charts to drill down into the department details.
2. Click the Back to Global Summary link to return to the Global Workforce Health Summary page or continue to analyze this department level by the topics displayed in the tabs at the top of the HR Executive Dashboard.
How do I read the Gains Report?

The following image shows the Gains report with headcount gain metrics displayed by recruiting source.

In this example, it looks like the majority of your headcount gains are in the Sales job family. This information provides context to your discussions with department leaders about the types of skills they are acquiring, how HR can assist the organization to grow talent from within, and how best to evaluate quality of hire for these key jobs.

You can change the perspective of the data displayed in the report by selecting one of the following view types in the View list:

- **Job Family** — Headcount gains by job family.
- **Country** — Headcount gains by country location.
- **Pay Grade** — Headcount gains by pay grade.

How do I read the Losses Report?

The following image shows the Losses report with headcount loss metrics displayed by the reason for leaving.

In this example, you can see that most of the employees you lost either retired or found better opportunities outside the company. You can use this information to investigate further and plan retention strategies to prevent expensive headcount losses in the future.
You can change the perspective of the data displayed in the report by selecting one of the following view types in the **View** list:

- **Reason for Leaving** — Headcount loss by reason for leaving.
- **Job Family** — Headcount loss by job family.
- **Country** — Headcount loss by country location.
- **Performance** — Headcount loss by performance rating.
- **Pay Grade** — Headcount loss by pay grade.
Evaluating Employee Mobility

This tutorial shows you how to view and evaluate employee mobility.

You want to see a high level view of employee transfers and the average time spent in positions for a particular month as well as trends over the past 12 months.

Use the sparkline tiles and reports in the HR Executive Dashboard — Global Internal Mobility page to help you analyze personnel movement, understand employee transfer opportunities, and determine whether employee mobility patterns are creating a positive or negative impact on your workforce.

To view the HR Executive Dashboard — Global Internal Mobility page:

1. Launch the OTBI Enterprise for Human Capital Management Cloud Service URL provided by your administrator.

2. From the Dashboards menu, expand Human Capital Management, and then select HR Executive Dashboard.

The HR Executive Dashboard — Global Workforce Health Summary page is displayed.
3. In the left pane on the dashboard page, verify that the Department Hierarchy and Hierarchy Version dashboard prompt list values are set correctly. This step ensures that the data displayed on the HR Executive Dashboard is accurate.

If you are uncertain which values to select, consult with your OTBI Enterprise for HCM Cloud Service implementer or administrator. Your implementer or administrator can set these values to default to the correct selections.

4. Select the Internal Mobility tab to display the HR Executive Dashboard — Global Internal Mobility page.
How do I read the Global Internal Mobility Sparkline Tiles?

The Global Internal Mobility sparkline tiles enable you to quickly assess employee mobility metrics.

The numbers within the tiles display the current data for the month you select in the Time dashboard prompt list. The sparkline graphs display data for the 12 months prior to the month you select.

This sparkline contains the following tiles:

- **Total Transfers** — Percentage of the total headcount that have transferred.
- **Top Performer Transfers** — Percentage of the total headcount assigned to the top performance bands that have transferred.
- **Leader Transfers** — Percentage of the total headcount classified as supervisors that have transferred.
- **Lateral Transfers** — Percentage of the total headcount that have transferred to a position that is different, but in the same pay grade as their previous position.
- **Promotions** — Percentage of the total headcount that have transferred to a more senior level position than their previous one.
- **Worker Mobility** — Calculated percentage of workers that have either transferred or have been promoted within the department. The worker mobility metric provides you with an overall indication of movement in the organization.

**Note:** Whenever departments are displayed in graphs in OTBI Enterprise for HCM Cloud Service, you can select the department element or name in the graph to drill down to view that department in detail. On the organization detail page, you can explore the selected department and its child departments in detail, or select the Back to Global Summary link to return to the top-level company view.
How do I read the Transfer Volume by Department Report?

With these metrics, you can determine if you are providing adequate opportunities for employees to move and grow within the organization, and confirm if you are gaining high performers through transfer activity. This information is vital for creating and refining employee retention and development strategies.

How do I read the Transfer Volume by Department Report?

The following image shows an example of the Transfer Volume by Department report metrics displayed by country location.

In this example, it looks like the Human Resources department has recently seen a high volume of transfers in the US and UK. This information can help you to effectively evaluate employee development requirements by region, job family, or other attributes.

You can change the perspective of the data displayed in the report by selecting one of the following view types in the View list:

- **All Values** — Total transfer count for the department.
- **Country** — Transfer counts by country location.
- **Job Family** — Transfer counts by job family classification.
- **Pay Grade** — Transfer counts by pay grade.
- **Transfer Type** — Transfer counts by workforce event.

To drill down for more details on a department:

1. Click in a bar, or on a bar heading label in the chart to drill down into the department details.

2. Click the Back to Global Summary link to return to the Global Workforce Health Summary page or continue to analyze this department level by the topics displayed in the tabs at the top of the HR Executive Dashboard.
How do I read the Average Time in Job Report?

The following image shows an example of the Average Time in Job report metrics. This report enables you to see the average time that workers spend in a position as indicated by the mobility opportunities within a department.

In this example, it looks like the Facilities department employees stayed the longest in their positions for an average of four years, whereas the Job Requisition department employees only stayed in their positions for an average of one year.

When you pinpoint the average time employees remain in the same job, this helps you to better analyze employee attrition (where employees may feel there are no opportunities for growth), organization productivity (where employees with more experience may be more productive), and effectively manage succession planning (identifying organizations with experienced workers that are ready for a change).

To drill down for more details on a department:

1. Click in a bar, or on a bar heading label in the chart to drill down into the department details.

2. Click the Back to Global Summary link to return to the Global Workforce Health Summary page or continue to analyze this department level by the topics displayed in the tabs at the top of the HR Executive Dashboard.
How do I read the Average Time in Job Report?
Evaluating Workforce Costs

This tutorial shows you how to view and evaluate workforce costs.

You want to see a high level view of workforce costs for a particular month as well as trends over the past 12 months.

Use the sparkline tiles and reports in the HR Executive Dashboard — Global Workforce Costs page to help you gain valuable insight into major payroll spending categories, such as salaries, overtime, and bonuses.

**To view the HR Executive Dashboard — Global Workforce Costs page:**

1. Launch the OTBI Enterprise for Human Capital Management Cloud Service URL provided by your administrator.

2. From the Dashboards menu, expand **Human Capital Management**, and then select **HR Executive Dashboard**.

   ![Dashboard Screenshot]

   The HR Executive Dashboard — Global Workforce Health Summary page is displayed.
3. In the left pane on the dashboard page, verify that the Department Hierarchy and Hierarchy Version dashboard prompt list values are set correctly. This step ensures that the data displayed on the HR Executive Dashboard is accurate.

If you are uncertain which values to select, consult with your OTBI Enterprise for HCM Cloud Service implementer or administrator. Your implementer or administrator can set these values to default to the correct selections.

4. Select the **Costs** tab to display the HR Executive Dashboard — Global Workforce Costs page.
How do I read the Global Workforce Costs Sparkline Tiles?

The Global Workforce Costs sparkline tiles enable you to quickly assess key workforce cost metrics.

The numbers within the tiles display the current data for the month you select in the Time dashboard prompt list. The sparkline graphs display data for the 12 months prior to the month you select.

This sparkline contains the following tiles:

- **Total Spending** — Total payroll balance amount.
- **Salaries** — Total annual base salaries amount.
- **Overtime** — Total amount of overtime pay.
- **Cost per Worker** — Total payroll cost divided by the total headcount for the same period.
- **Cost of Attrition** — Cost of attrition based on the assumption that the cost to replace a worker is 125% of the worker’s annual salary.
- **Leave Liability** — Total calculated cost of employee leave accrued, but not taken.

**Note:** Whenever departments are displayed in graphs in OTBI Enterprise for HCM Cloud Service, you can select the department element or name in the graph to drill down to view that department in detail. In the organization detail screen, you can explore that selected department and its child departments in detail, or select the **Back to Global Summary** link to return to the top-level company view.
How do I read the Workforce Costs Report?

With these metrics, you can pinpoint total payroll spending and trends, as well as costs for key categories like salaries and overtime. The Cost of Attrition metric enables you to understand how much attrition costs the organization. The Leave Liability metric enables you to understand the cost of untaken leave.

How do I read the Workforce Costs Report?

The following image shows an example of the Workforce Costs report metrics displayed by cost type. The Workforce Costs report enables you to see workforce costs from a variety of angles.

In this example, you can see that the Medical Claim Unit department spends significantly more on bonuses than the Job Requisition department. Understanding the proportion of spending on various payroll categories enables you to identify which departments may have higher costs due to taxes, overtime, or other pay components. You can use this information during strategic workforce planning sessions to determine the right mix of full and part time workers, as well as pinpoint the geographies from which to source future employees based on the total cost of employment.

You can change the perspective of the data displayed in the report by selecting one of the following view types in the View list:

- **Cost Type** — Costs classified by expenditure type.
- **Country** — Costs by country location.
- **Worker Type** — Costs by worker classification.
- **Salary Basis** — Costs by salary basis.
- **Department Level** — Costs by department level within the organization’s hierarchy.
- **Employment** — Costs for full-time employees.
To drill down for more details on a department:

1. Click in a bar, or on a bar heading label in the chart to drill down into the department details.

2. Click the Back to Global Summary link to return to the Global Workforce Health Summary page or continue to analyze this department level by the topics displayed in the tabs at the top of the HR Executive Dashboard.

How do I read the Five-Year Trend Report?

The following image shows an example of the Five-Year Trend report metrics. You use this report to examine trends in payroll costs over the past five years.

This report contains the following metrics:

- **Balance Amount** — Payroll balance by year.
- **Year** — Year in which the payroll balance is tracked.

With these metrics you can see that your workforce costs have been steadily on the rise. You can use this information as important context for strategic planning and further analysis of costs at the corporate and department levels.
How do I read the Five-Year Trend Report?
Evaluating Workforce Talent

This tutorial shows you how to view and evaluate workforce performance and department compensation.

You want to see a high level view of employee performance, compensation, and attrition for a particular month as well as trends over the past 12 months.

Use the sparkline tiles and reports in the HR Executive Dashboard — Global Talent page to help you to identify the proportion of your workforce that are high performers, determine if your compensation strategy is rewarding performance, and develop effective strategies to retain top talent.

To view the HR Executive Dashboard — Global Talent page:

1. Launch the OTBI Enterprise for Human Capital Management Cloud Service URL provided by your administrator.

2. From the Dashboards menu, expand Human Capital Management, and then select HR Executive Dashboard.

The HR Executive Dashboard — Global Workforce Health Summary page is displayed.
3. In the left pane on the dashboard page, verify that the Department Hierarchy and Hierarchy Version dashboard prompt list values are set correctly. This step ensures that the data displayed on the HR Executive Dashboard is accurate.

If you are uncertain which values to select, consult with your OTBI Enterprise for HCM Cloud Service implementer or administrator. Your implementer or administrator can set these values to default to the correct selections.

4. Select the Talent tab to display the HR Executive Dashboard — Global Talent page.
How do I read the Global Talent Sparkline Tiles?

The Global Talent sparkline tiles enable you to quickly assess proportion and loss of top and bottom performers, the percent of your workers that do not have a performance rating, and the number of workers that have been promoted during the selected time period.

The numbers within the tiles display the current data for the month you select in the Time dashboard prompt list. The sparkline graphs display data for the 12 months prior to the month you select.

This sparkline contains the following tiles:

- **Top Performers** — Percentage of employees classified as top performers.
- **Top Performer Attrition** — Percentage of terminated employees that were also classified as top performers.
- **Bottom Performers** — Percentage of employees classified as bottom performers.
- **Bottom Performer Attrition** — Percentage of terminated employees that were also classified as bottom performers.
- **No Performance Rating** — Percentage of employees without a performance rating.

**Note:** Whenever departments are displayed in graphs in OTBI Enterprise for HCM Cloud Service, you can select the department element or name in the graph to drill down to view that department in detail. On the organization detail page, you can explore the selected department and its child departments in detail, or select the Back to Global Summary link to return to the top-level company view.
How do I read the Pay for Performance Report?

The following image shows an example of the Pay for Performance report metrics displayed by pay grade, performance levels, and department.

The bubbles in the chart represent departments within the department hierarchy. The size of the bubbles indicate the relative number of headcount in the department compared to other departments.

In this example, the Vision Corporation department has the highest headcount (red bubble), with the average performance in the organization at approximately 80%, and compensation slightly above the market mid-range. Other departments have higher performance, but lower compensation. This information enables you to see where compensation strategies are effectively paying workers for top performance, and where compensation increases may be appropriate to reward top performers and reduce attrition risk.

This report contains the following metrics:

- **Promotions** — Percentage of employees that have been promoted at least once during the specified time period.

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</tr>
</thead>
<tbody>
<tr>
<td>1.7%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>97.2%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

With these metrics, you can see that only 1.7% of your workers are considered top performers, and no workers are classified as bottom performers. While you are not losing those top performers, the lack of performance ratings for 97% of the workforce means that there is a significant opportunity to better classify your talent with performance evaluation initiatives.

**How do I read the Pay for Performance Report?**

The following image shows an example of the Pay for Performance report metrics displayed by pay grade, performance levels, and department.

The bubbles in the chart represent departments within the department hierarchy. The size of the bubbles indicate the relative number of headcount in the department compared to other departments.

In this example, the Vision Corporation department has the highest headcount (red bubble), with the average performance in the organization at approximately 80%, and compensation slightly above the market mid-range. Other departments have higher performance, but lower compensation. This information enables you to see where compensation strategies are effectively paying workers for top performance, and where compensation increases may be appropriate to reward top performers and reduce attrition risk.

This report contains the following metrics:

- **Compa-ratio** — Average compensation for workers in the department compared to the salary mid-range point for their job. A value of 1 indicates the average compensation in the department is equal to the salary mid-range.

- **Performance** — Employee performance ratings by department.

To drill down for more details on a department:
1. In the chart, click the department bubble or department label in the legend to drill down into the department details.

2. Click the Back to Global Summary link to return to the Global Workforce Health Summary page or continue to analyze this department level by the topics displayed in the tabs at the top of the HR Executive Dashboard.

How do I read the Performance Detail Report?

The following image shows an example of the Performance Detail report metrics displayed by department level within the department hierarchy.

In this example, it looks like the Consulting department has an average employee performance rating of 100 and an average compa-ratio of just over the market mid-range point of 100%.

You can use this information to identify the departments where workers are either overpaid or underpaid compared to their performance. You can also use these metrics to effectively manage compensation planning cycles, analyze the root causes for attrition, and evaluate if compensation strategies are being applied equally across departments.

You can change the perspective of the data displayed in the report by selecting one of the following view types in the View list:

- **Department Level** — Employee performance levels for a specific department level within the department hierarchy.

- **Job Family** — Employee performance levels by job classification.

- **Pay Grade** — Employee performance levels by pay grade.

- **Worker Type** — Employee performance levels by worker type.

- **Country** — Employee performance by country location.

- **Salary Basis** — Employee performance by salary basis.

To drill down for more details on a department:

1. Click in a bar, or on a bar heading label in the chart to drill down into the department details.
2. Click the Back to Global Summary link to return to the Global Workforce Health Summary page or continue to analyze this department level by the topics displayed in the tabs at the top of the HR Executive Dashboard.

How do I read the Five-Year Trends Report?

The following image shows an example of the Five-Year Trends report metrics displayed with trends in workforce performance ratings within the past five years.

In this example, it looks like the average performance for new hires has been improving, while existing worker and top performer performance has remained steady. You can use this information to determine if your new hire learning and development programs are effective, and whether the company as a whole has been progressively improving performance or possibly requires new initiatives to bolster falling performance.

The report contains the following trend metrics:

- **New Hire Performance** — Performance rating trends for workers employed less than or equal to one year.
- **Existing Worker Performance** — Performance rating trends for workers employed one year or more.
- **Top Performers** — Performance rating trends for workers classified as top performers.

![Five-Year Trends](image)

How do I read the New Hire Performance By Recruitment Source Report?

The following image shows an example of the New Hire Performance By Recruitment Source report displayed with trend metrics in new hire performance by recruitment source.

In this example, it looks like your best performing new hires come from recruiters rather than social media. It also appears that workers coming from social media take longer to show performance improvements than those sourced from recruiters. You can use this information to tailor new hire programs based on hiring source to better support the new employee learning curve.

The report contains the following trend metrics:

- **Performance Rating** — New hire employee performance ratings.
- **Recruitment Source** — Recruiting channels that result in accepted employment offers.
How do I read the New Hire Performance By Recruitment Source Report?

New Hire Performance By Recruitment Source
Compare new hire performance over time by recruitment source.

<table>
<thead>
<tr>
<th>Recruitment Source</th>
<th>Performance Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media</td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td></td>
</tr>
</tbody>
</table>

- Social Media: [Graph showing performance]
- Recruiter: [Graph showing performance]

- 12 Months
- 24 Months
Evaluating Workforce Demographics

This tutorial shows you how to view and evaluate your labor force demographics. You want to see a high level view of your workforce demographics for a particular month as well as trends over the past 12 months.

Use the sparkline tiles and reports in the HR Executive Dashboard — Global Demographics page to help you proactively develop strategies to meet diversity targets and minimize the impact of retiring workers that take key skills with them when they leave.

To view the HR Executive Dashboard — Global Demographics page:

1. Launch the OTBI Enterprise for Human Capital Management Cloud Service URL provided by your administrator.

2. From the Dashboards menu, expand Human Capital Management, and then select HR Executive Dashboard.

The HR Executive Dashboard — Global Workforce Health Summary page is displayed.
3. In the left pane on the dashboard page, verify that the Department Hierarchy and Hierarchy Version dashboard prompt list values are set correctly. This step ensures that the data displayed on the HR Executive Dashboard is accurate.

If you are uncertain which values to select, consult with your OTBI Enterprise for HCM Cloud Service implementer or administrator. Your implementer or administrator can set these values to default to the correct selections.

4. Select the Demographics tab to display the HR Executive Dashboard — Global Demographics page.
How do I read the Global Demographics Sparkline Tiles?

The Global Demographics sparkline tiles enable you to quickly assess key overall workforce demographic metrics.

The numbers within the tiles display the current data for the month you select in the Time dashboard prompt list. The sparkline graphs display data for the 12 months prior to the month you select.

This sparkline contains the following tiles:

- **Minority Workers** — Percentage of employees classified as a minority.
  
  The groups identified as minority workers are determined by a single filter located in the /shared/Human Capital Management/Human Resources - Workforce Deployment/Role Dashboards/Minority Worker Filter directory.
  
  To select the ethnic groups identified as minority workers for your organization, you must modify this filter.

- **Female Workers** — Percentage of employees that identify themselves as the female gender.

- **Minority Managers** — Percentage of employees classified as a minority, and who are also supervisors.

- **Female Managers** — Percentage of employees that identify themselves as the female gender, and who are also classified as supervisors.

**Note:** Whenever departments are displayed in graphs in OTBI Enterprise for HCM Cloud Service, you can select the department element or name in the graph to drill down to view that department in detail. On the organization detail page, you can explore the selected department and it’s child departments in detail, or select the Back to Global Summary link to return to the top-level company view.
How do I read the Workforce Demographics Report?

- **Nearing Retirement** — Percentage of employees assigned to the near retirement age bands (aged 55 or older).
- **Average Tenure (yrs)** — Average length of service for all employees in years.

<table>
<thead>
<tr>
<th>Minority Workers</th>
<th>Female Workers</th>
<th>Minority Managers</th>
<th>Female Managers</th>
<th>Nearing Retirement</th>
<th>Avg Tenure (yrs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>58.2%</td>
<td>38.8%</td>
<td>68.4%</td>
<td>38.1%</td>
<td>7.1%</td>
<td>12</td>
</tr>
</tbody>
</table>

With these metrics, you can see that you have a very diverse workforce with a small percentage nearing retirement. You can use this information to create recruitment, succession, and training strategies to meet your workforce demographic needs.

How do I read the Workforce Demographics Report?

The following image shows an example of the Workforce Demographics report metrics displayed by age group. This information enables you to identify specific workforce population characteristics and trends.

You can change the perspective of the data displayed in the report by selecting one of the following view types in the View list:

- **Gender** — Workforce demography organized by gender.
- **Ethnicity** — Workforce demography organized by ethnic classification.
- **Age** — Workforce demography organized by age bands.
- **Country** — Workforce demography organized by country location.

This report also displays expanded demographic details in the following sub-charts:

- **Management** — Percentage of the selected demographic that are supervisors.
- **Promotions** — Percentage of the selected demographic who have been promoted at least once in the past 12 months.
- **Time in Current Job** — Percentage of the selected demographic displayed by time in service in months for their current position.
Tenure — Total time in service for the department in years.

In this example, you can see that workers in the 20-30 year age range are not managers, have been with the company for less than five years, and have been in the same job longer than other age groups. You can use this information to understand if specific age groups are at risk for higher attrition, may need more movement opportunities, and are represented by managers of their own age group.

How do I read the Workers Nearing Retirement Report?

The following image shows an example of the Workers Nearing Retirement report metrics displayed by pay grade. This information enables you to take inventory of the percentage of your workforce poised for retirement and the skill sets they will take with them when they go.

In this example, it looks like most of your workforce slated for retirement are Sales VPs. You can use this information to identify the jobs and seniority levels that most need succession planning, and begin planning recruitment and employee development initiatives to ensure key skills are not lost when employees retire.

You can change the perspective of the data displayed in the report by selecting one of the following view types in the View list:

- Job Family — Employees nearing retirement by job type.
- Pay Grade — Employees nearing retirement by pay grade level (indicates seniority within their job).
How do I read the Workers Nearing Retirement Report?
Customizing the HR Executive Dashboard

The HR Executive dashboard can be customized to suit your organization’s specific requirements.

Any customizations you make to the delivered objects are overwritten when any updates are applied to your OTBI Enterprise environment. Therefore, Oracle recommends that you perform the following steps:

1. Create a copy of the HR Executive dashboard, Organization Detail dashboard, and any reports or filters you wish to customize.
2. Save the copies to the \Shared Folders\Custom\Human Capital Management\ directory.

If you want to apply specific data filters to all of the reports displayed in the HR Executive Dashboard, you can modify the shared filters. For example, if you always want to exclude a specific set of departments from the reports displayed in the HR Executive Dashboard, you can modify the shared filters to never include those departments in any reports on the dashboard.

The shared filters are as follows:

- \Shared Folders\Human Capital Management\Human Resources - Compensation\Role Dashboards\HR Executive\Global\Dashboard Filter
- \Shared Folders\Human Capital Management\Human Resources - Payroll\Role Dashboards\HR Executive\Global\Dashboard Filter
- \Shared Folders\Human Capital Management\Human Resources - Recruitment\Role Dashboards\HR Executive\Global\Dashboard Filter
- \Shared Folders\Human Capital Management\Human Resources - Workforce Deployment\Role Dashboards\HR Executive\Global\Dashboard Filter
- \Shared Folders\Human Capital Management\Human Resources - Workforce Gains and Losses\Role Dashboards\HR Executive\Global\Dashboard Filter
- \Shared Folders\Human Capital Management\Human Resources - Compensation\Role Dashboards\HR Executive\Organizations\Dashboard Filter
- \Shared Folders\Human Capital Management\Human Resources - Payroll\Role Dashboards\HR Executive\Organizations\Dashboard Filter
- \Shared Folders\Human Capital Management\Human Resources - Recruitment\Role Dashboards\HR Executive\Organizations\Dashboard Filter
- \Shared Folders\Human Capital Management\Human Resources - Workforce Deployment\Role Dashboards\HR Executive\Organizations\Dashboard Filter
Customizing Analytics Library Content

OTBI Enterprise is delivered with a library of pre-built analytic reports to help you save time with your implementations and make it easy for you to create advanced analyses with the rich library of metrics available. These delivered reports are stored in the following OTBI Enterprise web catalog directory: \\Shared Folders\\Human Capital Management\\Analytic Library. For your convenience, the reports are organized into sub-folders that represent major topics.

You can add the delivered reports to any dashboard that you create, or you can copy the delivered reports and customize them to your meet your specific needs. The delivered reports are designed to support dashboard prompts, and many of them already have several filter criteria defined, including many of them set to "Is Prompted."

If you do not place a delivered report on a dashboard, you must either add report prompts to the report, or explicitly set filter values for the report. This enables you to avoid instances where the report does not return data due to too much data queried by the application.

Any customizations you make to the delivered objects are overwritten when any updates are applied to your OTBI Enterprise environment. Therefore, Oracle recommends that you create a copy of the delivered reports found in the Analytic Library and save them to the \\Shared Folders\\Custom\\Human Capital Management directory.

Configuring Bands

As part of the OTBI Enterprise setup process, your implementer defines a set of mappings between values in your Oracle Fusion HCM application and OTBI Enterprise. Many of these mappings can be modified to fit your specific business needs.

You may want to have your administrator or implementer alter, remove, or add bands to the following configurable mappings:

- Age Bands — OTBI Enterprise can segment workers according to their age. Out of the box OTBI Enterprise defines a set of six age bands.

- Performance Bands — OTBI Enterprise can segment workers according to their performance rating. Out of the box OTBI Enterprise defines a set of six performance bands.

- Length of Service Bands — OTBI Enterprise can segment workers according to their tenure with the company. Out of the box OTBI Enterprise defines a set of seven length of service bands.

- Period of Placement Bands — OTBI Enterprise can segment contingent workers according to their time of placement with the company. Out of the box OTBI Enterprise defines a set of seven period of placement bands.

Note: You must apply any modifications to these filters every time your OTBI Enterprise environment is patched or upgraded.
- Compa-Ratio Bands — OTBI Enterprise can segment workers according to their compa-ratio. Out of the box OTBI Enterprise defines a set of eight compa-ratio bands.