



State of Ohio Business Intelligence Enhancement Release Notes – March 2015

The State of Ohio Business Intelligence is pleased to announce the enhancements from the month of March, 2015. These enhancements were all requested by users, approved by the Business Intelligence Shared Council (BISC) where applicable, built, tested, and validated. This month’s enhancements consist of an updated PCard Standard Report two brand new PCard Standard Reports, and a new ePerformance Standard Report.

Contents

1– FIN Enhancements

- 1.1 New PCard Report – *PC-0005 Payment Card Holder to Proxy Report* 1
- 1.2 New PCard Report – *PC-0006 Maximize Use of Payment Card*..... 1
- 1.3 Updated PCard Report – *PC-0002 Payment Card Accounting Detail Report*..... 2

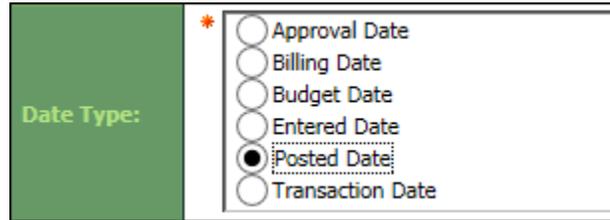
2 – HCM Enhancements

- 2.1 New ePerformance Report – *PM-86 Late Reviews Report* 2

1 – FIN Enhancements

- 1.1 A new report – *PC-0005 Payment Card Holder to Proxy Report* – has been added to the PCARD folder of the Procure to Pay data mart. This report enables agencies to evaluate proxy associations for individual cardholders. The report returns a list of proxies for associated with individual cardholders who have an unexpired PCard. The report also indicates which role (Viewer/Reconciler/Approver) association the proxy has with the cardholder. The report can be grouped by either department or location. This report is especially helpful to Agency Pcard Administrators for the periodic review of Pcard proxy associations, allowing agencies to ensure that only necessary proxies have access to specific accounts.
- 1.2 A new report – *PC-0006 Maximize Use of Payment Card* has been added to the PCARD folder of the Procure to Pay data mart. This report *should* be used by the agencies in order to evaluate vouchers that total less than \$2,500. The agency should determine whether any of these payments could have been made using the Pcard. If it is determined that a payment(s) could have been made with the Pcard, the agency should consider using the Pcard for future payments to the merchant. Payment card is the most efficient and cost effective way to make a purchase and maximizing the use enhances the State's Pcard rebate, offering in-direct savings to the agency.

1.3 An update has been made to the existing *PC-0002 Payment Card Accounting Detail Report*. The 'Date Type' prompt now includes an option for 'Posted Date.'



The image shows a user interface prompt for selecting a date type. On the left is a green box with the text "Date Type:". To the right is a white box containing a list of radio button options: "Approval Date", "Billing Date", "Budget Date", "Entered Date", "Posted Date", and "Transaction Date". The "Posted Date" option is selected, indicated by a black dot in the center of its radio button. A small red asterisk is located at the top left of the white box.

Figure 1

2 – HCM Enhancements

2.1 A new ePerformance Report – *PM-86 Late Reviews Report* – has been added to ePerformance folder in the HCM report package. This report consolidates the current ePerformance *PM-81 Delinquent Review Aging Report* and *PM-84 Employees with Late Reviews in the Current Year* reports into a single report. It is intended to provide agency ePerformance Administrators with the ability to identify late performance reviews for their employees.

If you have any questions about these enhancements, please contact the Business Intelligence team at Business.intelligence@das.ohio.gov. If you would like to request an enhancement, whether it is a new field or table for reporting, a modification to an existing Standard Report, or even an entirely new Standard Report, please contact the OAKS Help Desk.