

State of Ohio Business Intelligence Enhancement Release Notes – March 2014

The State of Ohio Business Intelligence is pleased to announce the enhancements from the month of March, 2014. 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 updated FIN and HCM Standard Reports, a new HCM Standard Report and new tables in the General Ledger and Compensation data mart presentation layers.

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1 – FIN Enhancements

- 1.1 A new report – *EXC-0002 Inactive Employee with Active PCard* – has been added to the *Exceptions* folder in the *Procure to Pay* data mart.

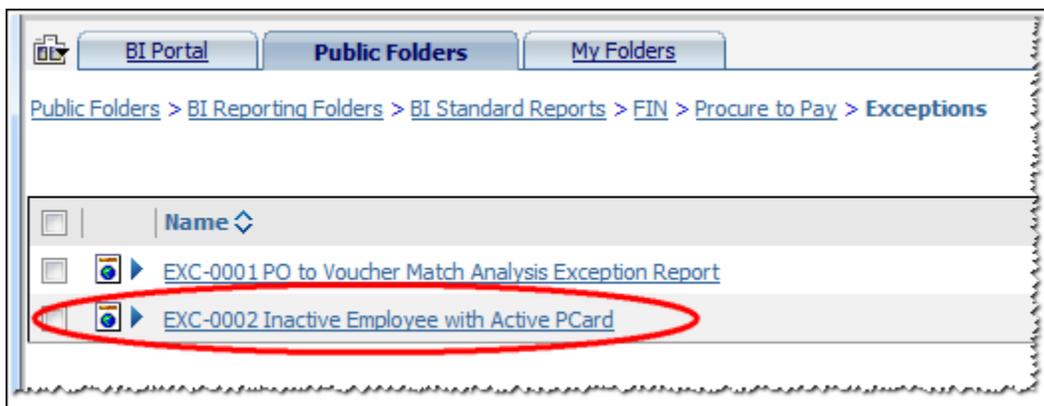


Figure 1

The report will allow users to monitor for PCard accounts that remain open for people who are no longer employed by the State of Ohio. It searches for, and returns, any employees with an inactive employment status in the HCM tables who also have a PCard account with an Expiration Date that is greater than the date the report is run. The only prompt is on Business Unit.

1.2 The following Voucher reports in the *Voucher AP* folder of the *Procure to Pay* data mart – *VAP-0002 Voucher Summary Inquiry Report*, *VAP-0003 Voucher Accounting Detail Report*, *VAP-0005 Voucher Payment Report* and *VAP-0007 Vouchers Without Full Payment* – have had their voucher Origin prompts updated. The voucher origins are now listed in alphabetical order by Agency, to make it easier to locate all applicable origins:

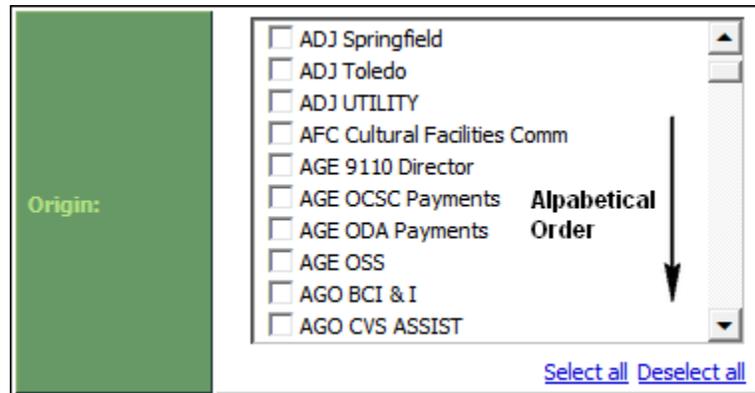


Figure 2

1.3 Two new metrics – *Uncollected Revenue Balance* and *Total Revenue Budget* – have been added to the Fact CC Balances table in the *GL-Commitment Control Budget Balances* subject area. Users may find these metrics of use when reporting on estimated revenue.

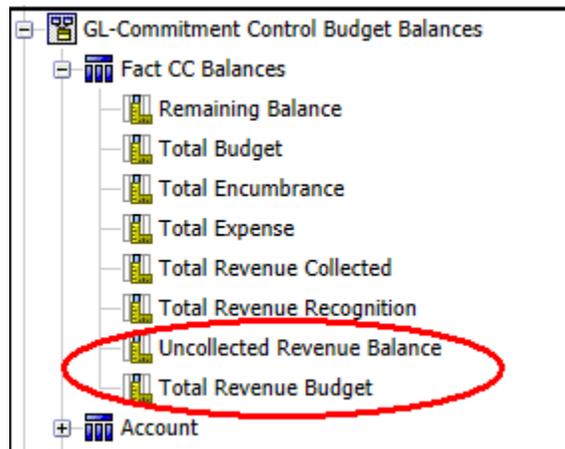


Figure 3

2 – HCM Enhancements

2.1 An update has been made to the *WFP-0002 Employee History (EHOC) Report*. The report now captures information for employees who have name changes, and displays all of the names for the employee on the report. It also allows searching for the employee under any of the previous names on the Prompt page, e.g. Sally Jones or Sally Smith. This will help with public records requests and help users find employees who may have other names in the system.

The different names will first be seen on the prompt page (see Figure 4 on the following page).

WFP-0002 - OAKS/HR2K Employee History Report (EHOc) Prompt Page

Employee's Name:

Keywords:
Type one or more keywords separated by spaces.

10000013

Options

Starts with any of these keywords

Starts with the first keyword and contains all of the remaining keywords

Contains any of these keywords

Contains all of these keywords

Case insensitive

Results:

HEDMAN,SARAHE-10000013

O'LEARY,SARAHE-10000013

OLEARY,SARAHE-10000013

Choices:

Figure 4

No matter which name is chosen in the prompt, the person's entire history will still be returned. All of the person's names will be displayed in a new, separate table at the top of the report along with the effective date of the change (see Figure 5 below).

Employee Name-ID		Effective Date
O'LEARY,SARAHE-10000013		May 3, 2012 12:00:00 AM
O'LEARY,SARAHE-10000013		Feb 15, 2009 12:00:00 AM
O'LEARY,SARAHE-10000013		Sep 28, 2008 12:00:00 AM
HEDMAN,SARAHE-10000013		Nov 3, 2003 12:00:00 AM

Effective Date	Sequence No	Description of Change	Employee ID - EHOc	Employee Name	Job Code	Job Title	Step	Grade	HR Status Code
9/15/10	0	Payroll Leave Action - Disability Pay	10000013	O'LEARY,SARAH E	66821	Tax Program Administrator 1	2	016	A
8/18/10	0	Payroll Leave Action - Adoption Childbirth Leave	10000013	O'LEARY,SARAH E	66821	Tax Program Administrator 1	2	016	A
8/1/10	0	Pay Rate Change - Batch Supp Pay	10000013	O'LEARY,SARAH E	66821	Tax Program Administrator 1	2	016	A
10/11/09	0	Position Change - Reports To Change	10000013	O'LEARY,SARAH E	66821	Tax Program Administrator 1	2	016	A
9/9/09	0	Position Change - Position Location Change	10000013	O'LEARY,SARAH E	66821	Tax Program Administrator 1	2	016	A
8/2/09	0	Pay Rate Change - Batch Supp Pay	10000013	O'LEARY,SARAH E	66821	Tax Program Administrator 1	2	016	A
6/21/09	0	Data Change - To/From TL Self Service	10000013	O'LEARY,SARAH E	66821	Tax Program Administrator 1	2	016	A
9/28/08	0	Data Change - Name Change	10000013	O'LEARY,SARAH E	66821	Tax Program Administrator 1	2	016	A

Figure 5

2.2 The COMP-0004 Earnings Lookup Report has been updated with the addition of two new fields – *Bargaining Unit Code-Job* and *Bargaining Unit-Job* description – to the report layout (see Figure 6 on the next page). The prompt page for the report already has the option to select the Bargaining Unit(s) as a filter, but the field is not included in the report layout. By including the Bargaining Unit information, it will be easier for users to determine which employees are associated with which Bargaining Units.

COMP - 0004 Earnings Lookup Report											Data Dictionary
For Pay Period End Range: Between Mar 8, 2014 and Mar 8, 2014											03/24/14 9:35 AM
Total By Employee											
Employee ID	Name	Job Code	Job Title	Department	Department Description	Bargaining Unit Code - Job	Bargaining Unit - Job	Earnings Code	Earnings Code Description	Hours	Earnings Amt
[REDACTED]		46531	Correction Officer	DRC210100	ALLEN/OAKWOOD CORR INST	03	AFSCME	SOK	Sick Leave	8	\$172.16
										8	\$172.16
		65521	Psychiatric/MR Nurse	DRC210100	ALLEN/OAKWOOD CORR INST	11	1199	SOK	Sick Leave	8	\$328.00
										8	\$328.00
		42541	Correctional Laundry Coordinat	DRC210100	ALLEN/OAKWOOD CORR INST	05	AFSCME	SOK	Sick Leave	8	\$172.16

Figure 6

2.4 A new table – *Benefit Participation* – has been added to the *Benefits* subject area in the *Compensation* data mart.

[-] Benefits
[-] Fact Benefit Enrollment
[-] Benefit Plan
[-] Benefit Participation
[-] Available Through Self-Service
[-] Benefit Program
[-] Benefit Record Number
[-] COBRA Eevent
[-] Date Notified of Options
[-] Days to Print
[-] Effective Sequence of Event
[-] Election Received Date
[-] Election Source
[-] Event Change Date
[-] Event Classification
[-] Event Date
[-] Event Disconnect Date
[-] Event Disconnected
[-] Event Empl Record
[-] Event ID
[-] Event Out of Sequence
[-] Event Priority
[-] Event Status
[-] Job Effective Date
[-] Job Effective Sequence
[-] Job Eligibility Change Date
[-] Job Eligibility Changed
[-] Process Status
[-] Schedule ID
[-] Service Date
[-] Source of Action
[-] Status Date
[-] Suppress Forms - Print Option

Figure 7

HCM Operations is going to use the new tables to move PS Queries to BI to improve performance, as well as enhance delivered HCM reports as they move them over to BI. The PS Queries run too long and the delivered reports do not have enough information to readily identify the employee-related data. This new data will also allow HCM Operations to build dashboards to keep the agencies apprised of their agency-specific transaction metrics.

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.