

State of Ohio Business Intelligence Enhancement Release Notes May 2012

State of Ohio Business Intelligence is pleased to announce the enhancements for the month of May, 2012. These enhancements were requested by users, approved by the Business Intelligence Shared Council (BISC), built, tested and validated. The enhancements consist of a new report, a new table and several new fields in the HCM package as well as a new field in the FIN package. In addition, the DAS Equal Opportunity Division (EOD) has partnered with the BI Team to enhance the MBE/EDGE reports.

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1 – HCM Enhancements

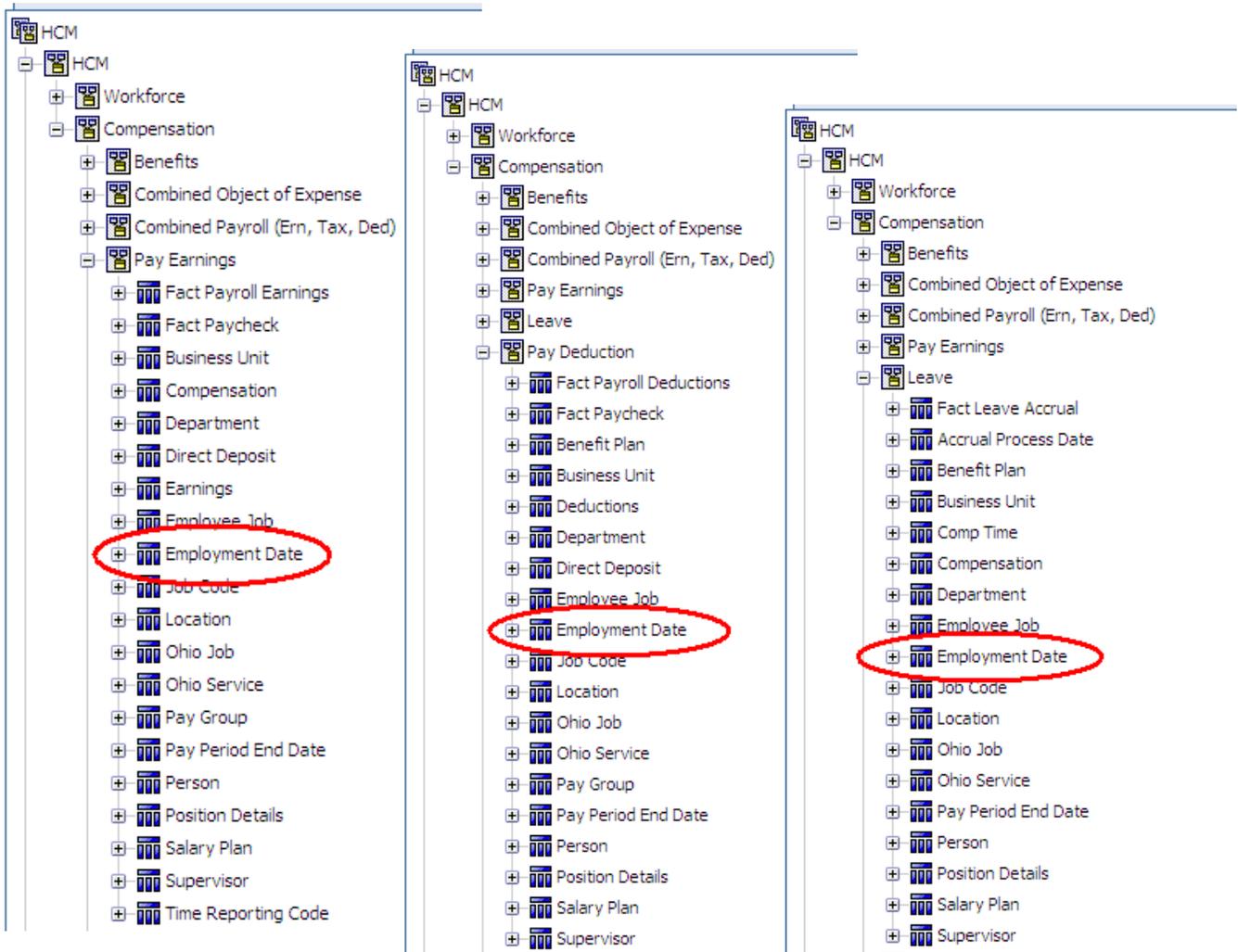
1.1 Projected Annual Performance Evaluation Report

A new report, WFP-0054 Projected Annual Performance Evaluation, has been added to the Employee Information folder of the HCM standard reports. This report allows HR Professionals to notify supervisors and/or upper level management when their respective employees are approaching their annual review date. The benefit is that annual reviews could be done in a timely manner.

The screenshot shows the IBM Cognos Connection interface. At the top, there are navigation tabs for 'BI Portal', 'Public Folders', and 'My Folders'. Below the tabs, a breadcrumb trail reads: 'Public Folders > OAKS Reporting Folders > OAKS Standard Reports > HCM > Employee Information'. A list of reports is displayed below, each with a checkbox and a right-pointing arrow icon. The reports listed are: 'WFP-0001 Employee Lookup', 'WFP-0002 Employee History Report (EHOC)', 'WFP-0036 OT Exempt - Eligible Change', 'WFP-0047 Birthday Report', 'WFP-0051 Step Entry Dates', 'WFP-0052 Employee Education', and 'WFP-0054 Projected Annual Performance Evaluation'. The last report, 'WFP-0054 Projected Annual Performance Evaluation', is circled in red.

1.2 Employment Date Table and Related Fields

A new table, Employment Date, has been added to the *Compensation* data mart in the *Pay Earnings*, *Pay Deduction*, and *Leave* subject areas. This table contains the *Probation Date*, *Rehire Date*, and *Service Date* fields.



1.3. New Date Fields Added to Compensation Data Mart

Three new date fields previously only available in the *Workforce Profile* data mart – *Department Entry Date*, *Hire Date*, and *Step Entry Date* – have been added to the *Pay Earnings* subject area of the Compensation data mart in the *Employee Job* table. These date fields, along with the date fields in the new *Employment Date* table, should give report writers much more flexibility in defining the types of dates they would like to include in their compensation-related reports.

The screenshot displays a hierarchical tree view of a data mart. The main tree on the left is expanded to show the 'Employee Job' table under the 'Pay Earnings' subject area. Three date fields are highlighted with red circles: 'Department Entry Date' at the bottom of the main tree, and 'Hire Date' and 'Step Entry Date' in two inset windows on the right. The inset windows show a list of fields for the 'Employee Job' table, with 'Hire Date' and 'Step Entry Date' circled in red.

- Compensation
 - Benefits
 - Combined Object of Expense
 - Combined Payroll (Ern, Tax, Ded)
 - Pay Earnings
 - Fact Payroll Earnings
 - Fact Paycheck
 - Business Unit
 - Compensation
 - Department
 - Direct Deposit
 - Earnings
 - Employee Job
 - Facts
 - Employee ID
 - Action
 - Action Code
 - Action Reason
 - Action Reason Code
 - Adds To FTE Actual
 - Bargaining Unit - Job
 - Bargaining Unit Code - Job
 - Benefits Employee Status
 - Benefits Employee Status Code
 - Benefits System
 - Benefits System Code
 - Classified/Unclassified Indicator - Job
 - Classified/Unclassified Indicator Code - Job
 - Convent Indicator - Job
 - Department Entry Date**
 - Effective Date - Job

Inset 1 (Hire Date):

- FLSA Status - Job
- FLSA Status Code - Job
- Full/Part Time - Job
- Full/Part Time Code - Job
- Hire Date**
- HR Status
- HR Status Code
- Inter Agency Transfer
- Intra Agency Transfer
- Job Indicator

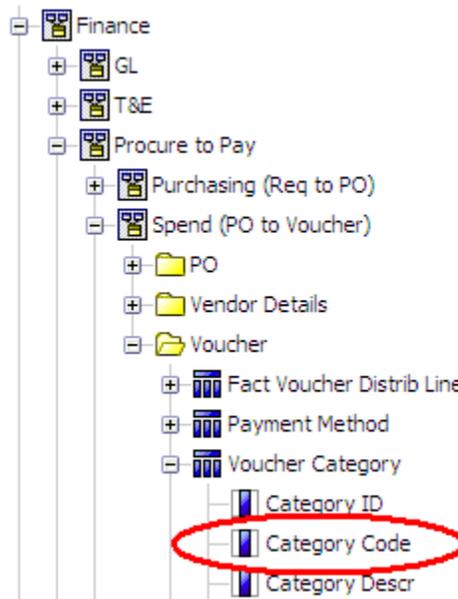
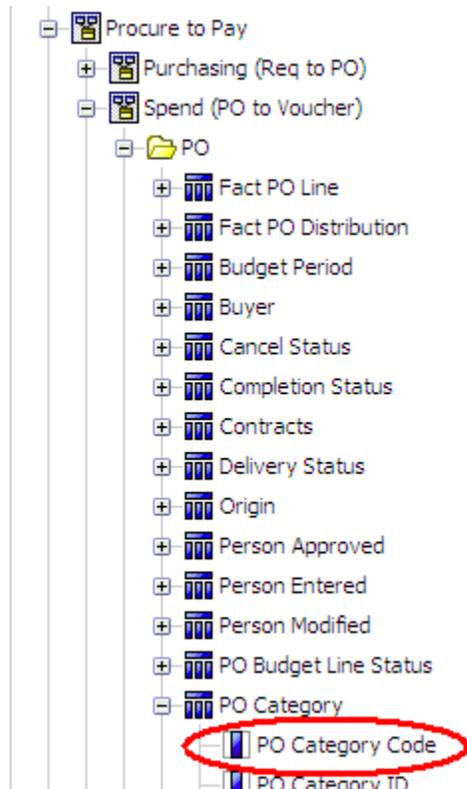
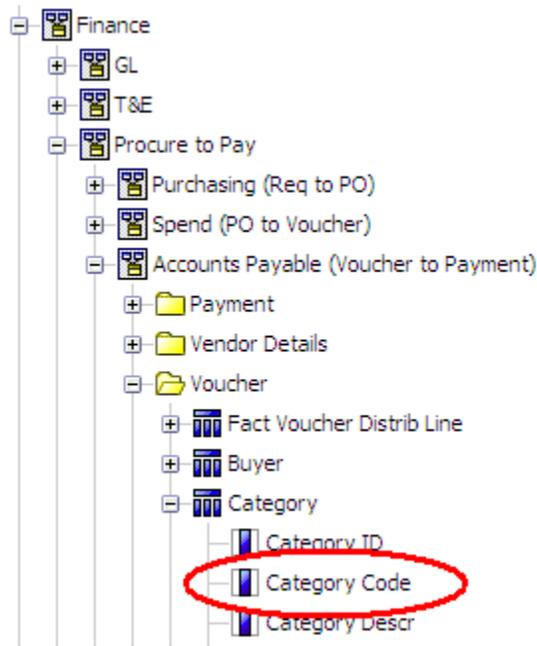
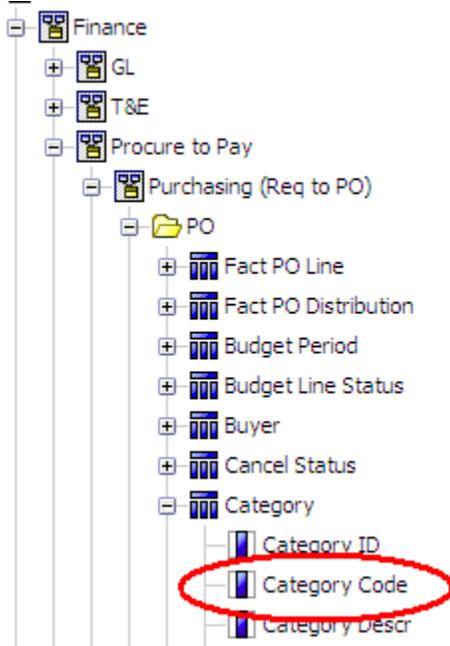
Inset 2 (Step Entry Date):

- Regular Shift
- Regular Shift Code
- Reports To - Job
- Separation
- Step Entry Date**
- Union Code - Job
- Union Code Description - Job

2 – FIN Enhancements

2.1 Category Code Field

A new field, Category Code, has been added to the *Category* table in the *Purchasing (Req to PO)* and *Accounts Payable (Voucher to Payment)* subject areas, and to the *PO Category* and *Voucher Category* tables in the *Spend (PO to Voucher)* subject area, all of which are in the *Procure-to-Pay* datamart. The Category ID field contains the 5 character UNSPSC code for items from OAKS FIN. UNSPSC is a coding system to classify both products and services for use throughout the global eCommerce marketplace.



3 – MBE/EDGE Enhancements

3.1 Six Enhanced Reports Announced

The DAS Equal Opportunity Division (EOD) recently announced the availability of enhanced MBE/EDGE reports in the Business Intelligence data warehouse. There are currently six standard MBE/EDGE reports in the BI environment.

1. EOD 0001 - Vendor Utilization Analysis Report
2. EOD 0002 - EDGE Contract Type
3. EOD 0003 - EDGE Subcontractor Payments
4. EOD 0004 - EDGE Contract/Project Waiver Report
5. EOD 0005 - MBE/EDGE Flag - Adjustment Audit Report
6. EOD 0006 - Voucher Identified as Flagged Non-Certified MBE/EDGE Report

The Equal Opportunity Division recommends that state agencies use these standard reports for state MBE/EDGE reporting purposes, and refer to these reports as the authoritative source, since they reflect the most current EOD policies. If you have any questions or comments regarding these reports and/or MBE/EDGE policies, please review the “EOD Email Notice” document in the Enhancement Notes news section, or contact Todd McGonigle at Todd.McGonigle@das.state.oh.us.

3.2 Enhanced Vendor Utilization Analysis Report

EOD-0001 – Vendor Utilization Analysis Report, the primary report which tracks MBE/EDGE spend for agencies, has been enhanced with updated logic and additional capabilities. These enhancements include:

- 1) Added “Voucher Detail” version of the report which lists for all eligible vouchers at the voucher level what, if any, MBE/EDGE spend is given for that voucher along with all the supporting attributes which are needed to determine MBE/EDGE spend. Also added “Department and Fund” version of the report listing MBE/EDGE spend by these two attributes.

EOD 0001 - Vendor Utilization Analysis Report - Cogn...

Business Unit: ADJ01, AGE01, AGR01, AMB01, ARC01, ATH01, BDP01

Voucher Accounting Date Range: * May 30, 2012, * May 30, 2012

Run By: * Account Summary, Gender, Race and Account, Gender and Race, All Vendors, Certified Vendor, Department and Vendor, Department and Fund, Voucher Detail

If including account, account level: * 7 (Please choose 2,3,4, 6 or 7, otherwise 6 will be defaulted.)

Additional enhancements to this report:

- 2) Participation/MBE Non-Set Aside Expenditures logic has been updated to allow participation credit if the vendor was certified at either the time of the voucher accounting date or PO date if the voucher originated from a PO.
- 3) Because construction services are not a part of the MBE program, EDGE participation credit will be given when the MBE flag on the voucher/PCard is 'M', 'N', or blank and the vendor is certified both MBE and EDGE. Usually, when a vendor is certified both MBE and EDGE, the participation credit goes to MBE. However, since Construction Services are not part of MBE, EDGE participation credit is given on those purchases on EOD-0001 (including when the MBE flag is M).
- 4) Drill through capabilities were added to the report. Drilling through will present the voucher level detail which makes up the subtotal on which the user clicked.
- 5) Added "PCard:" label to PCard vendor/merchant field. Because PCard purchases are not eligible for participation credit, this prefix allows you to quickly determine that even though the vendor may be certified, participation credit was not given because the purchase was made via PCard.
- 6) Consolidated Current and Historical versions of the report.