

## Monthly Enhancements Made to OAKS Business Intelligence Cognos

OAKS Business Intelligence Implementation Project Team  
E-mail: [OAKS.BI-EPM90ProjectTeam@oaks.state.oh.us](mailto:OAKS.BI-EPM90ProjectTeam@oaks.state.oh.us)

OAKS Business Intelligence is pleased to announce the March 2011 enhancements made to the OAKS BI Cognos instance. These enhancements were all requested by users, approved by the chairs of the Business Intelligence Shared Committee, and then built, tested and validated. The enhancements include three new reports, two modified standard reports, changes to the Quick Analysis dashboard reports, and a reorganization of the folders for the WFP standard reports.

### The enhancements to the FIN package are as follows:

1. A new report, "GL-0069 Daily Collected Revenue by Agency and Fund Report," has been added to the Budget folder in the General Ledger data mart. This report tracks Revenue Collected from budget ledger "CC\_AGY\_COL" on a daily basis. This report will assist agencies in verifying the deposits from the prior business day, which is the default date, but they will also be able to check deposits for specific dates if they want.
2. The Quick Analysis Dashboard reports – both Revenue and Expense – have been modified to suppress lines with null values. In addition, the reports now allow for all rows of data to be retrieved. This means that the reports are no longer limited to a maximum of 20 rows when run in HTML (there is now a "Page Down" option) or when exported to Excel.
3. The "GL-0045 Fund Dashboard Report" has been modified with the addition of two new charts and their corresponding list reports. The charts offer comparisons of GL Cumulative Revenue Year-to-Date by Accounting Period versus the same period from the prior year, and the same analysis for GL Cumulative Expense. These new charts and the associated list reports will assist agencies who track funds with cyclical or irregular revenues and expenditure flows, and allow them to more easily track their year-to-date trending when compared to the prior year.

### The enhancements to the HCM Package are as follows:

1. The "WFP-0020 Seniority Report" has been modified in three ways. First, the 'Position Number' field was added. Second, the sort of the tie breaker has been changed to reflect union's contracts. Third, the logic of the most recent pay period's default date has been changed: previously, the default date on the prompt showed the most recent pay period without consideration of the seniority calculations service run date. The new prompt will inform the user of the most recent payroll date with seniority calculations available. This enhancement will help users avoid a situation that could be confusing - they use the last pay period, and they do not get data.
2. The folders containing the WFP standard report have been reorganized. They continue to be organized according to similar functionality, but the parent folders now contain new subfolders to better categorize similar type reports. This makes it easier to navigate to these reports.

The parent subject area folders are still the same: "Employee Information", "Job Action Reports", "Position Management", "Time Reporting and Workforce Composition", but one new folder, called "**Exception Reports & Data Quality**", has been created. This is where all the exception reports now reside.



In addition to the new parent folder, the following are new subfolders:

- A. Inside “Job Action Reports” is a subfolder called “**Employee Movement**”. This contains all reports related to hires, separations, and transfers.
  - B. Inside “Position Management” is a subfolder called “**Organizational Structure**”. This contains all reports related to succession planning, i.e. Turnover, Retirement Projections, Length of Service.
  - C. Inside “Workforce Composition” there are two subfolders called “**Workforce Planning**” and “**EEO**”.
    - 1) “**Workforce Planning**” contains all reports related to succession planning, i.e. Turnover, Retirement Projections, Length of Service
    - 2) “**EEO**” contains all reports related to Equal Employment Opportunity analysis, i.e. Ethnicity and Gender
3. A new report, “WFP-0048 Department Job Movement, Productivity and Separation,” has been created to provide visibility to personal actions occurring not only between agencies but also within an agency’s departments. This report can uncover reasons for employee movement, productivity and separation that can occur within an agency. For example, if many people are leaving a specific agency’s department to go to another in the same department may warrant some investigation. This report is located in the new “Employee Movement” subfolder of the “Job Action” folder.
4. A new report, “WFP-0049 Action Reason Code with EEO Data Report,” has been created. This report is similar to WFP-0003, the Action Reason report, but it also contains EEO related data: date of birth, ethnicity, and gender and seniority credits. With this report, users can now report demographic statistics for personal actions, such as promotions, hires and terminations, by ethnicity, gender and age during a given period of time. This report is located in the “EEO” subfolder of the “Workforce Composition” folder.

If you need assistance or have questions or concerns about these enhancements, please contact the OAKS Help Desk via e-mail at [oaks.helpdesk@oaks.state.oh.us](mailto:oaks.helpdesk@oaks.state.oh.us) or by phone at 614-644-6625 or 1-888-OhioOAKS (1-888-644-6625).