

Can Your HR Reporting Tool Do This?

NRECA's Answer to HR Custom Reporting
Needs

Presentation Objectives

- As a result of this presentation, you will have an understanding of:
 - How to leverage BI Discoverer for custom HR reports with NoetixViews
 - Efficiency of buy vs. build
 - End-user ease of use
 - Lessons learned from implementation & upgrade of this solution

Presenter

- **Rosanna Stankavage** is the Director, Compensation, Benefits & HR Systems at the National Rural Electric Cooperative Association (NRECA).
- Over seven years hands-on experience using Oracle HRMS with Discoverer on 11.0.3, 11.5.7 and 11.5.10

Agenda

- Background
- The Problem
- NRECA's Solution
- Benefits to NRECA
- Report and View Samples
- Lessons Learned
- Questions

Background

- Oracle 11.0.3 implementation/11.5.7 and 11.5.10 upgrades
- Discoverer 4.x to BI Discoverer 10g
- NRECA did not adequately anticipate reporting needs or cost of developing views and reports

The Problem

- Oracle seeded reports did not meet our business needs
- Oracle database structure is complex
- Table views not useful without joins and joins not easy to define
- HR needed to have data from multiple tables/views accessible for individual reports

The Problem

- Cost and Time constraints
- Wanted minimal on-going IT support
- Flexibility and ability for complex reporting by end-user necessary
- Needed a solution that would be able to accommodate our future functionality growth or business changes

NRECA's Solution

- We had Discoverer and planned to use it as our main reporting tool
- We purchased NoetixViews for Human Resources
- Views and Joins pre-built
 - HR able to access most relevant combinations of employee data without having to export and combine in another application

NRECA's Solution

- Trained Functional “super users” and IT staff
- “Super users” trained department end-users
- HR “super users” define most reports through Discoverer for department use
- Once defined, HR end-users run reports as need dictates

Benefits to NRECA

- NoetixViews were easy to Implement with Discoverer
 - Installation process was fast
 - Installation read and identified our set-up, configuration, and defined flexfields
- Easy to maintain
 - Changes to configuration and most value sets are detected as they happen
 - Views can be regenerated for changes that are not detected automatically

Benefits to NRECA

- Less expensive than writing custom reports and views
 - Estimated savings of \$3000 to \$5000 per custom report we would have needed to define
 - Additional implementation time and expense saved by not having to cobble together Oracle views

Benefits to NRECA

- Audit of Set-ups during Implementation
 - Job definitions (FLSA categories, EEO-1 Codes, etc.)
 - Position definitions (correct jobs, grades and organizations)
 - Element definitions
 - Assignment & Person Information
 - Application Lookups

Benefits to NRECA

- Freedom (!) from IT programming support for almost all ad hoc reporting
- Help Files generated based on NRECA's configuration
 - View descriptions
 - Detailed column definitions
 - Sample questions
 - Related Views

Sample – View Description

The screenshot shows a web browser window titled "NoetixViews Help, Noetix Corporation". The menu bar includes "File", "Edit", "Bookmark", "Options", and "Help". Below the menu bar are navigation buttons: "Contents", "Index", "Back", "Print", and "Noetix". The main content area features the "Noetix Views" logo and the title "HR_Emp_Asg_Details View Description". There are three green links: "Columns", "See Also", and "Examples". The text describes the view as "HR Basic - Employee Assignment Detail Information" and provides a detailed explanation of the data it returns, including job, position, location, grade, organization, and assignment status. A note at the bottom explains that U.S. reporting information is contained in this view and provides instructions on how to restrict results to the primary assignment only using the "Primary_Flag" parameter. The "Business Group" is listed as "NRECA".

Noetix Views®
HR_Emp_Asg_Details View Description

[Columns](#) [See Also](#) [Examples](#)

HR Basic - Employee Assignment Detail Information

This confidential view returns current employee assignment details including job, position, location, grade, organization, people group and supervisor assignments. In addition, assignment status, cost (center) allocation, standard working hours and conditions, performance and salary review schedule, and probation information may be selected. Additional assignment and personal details are available, as well as an indication whether the employee is a manager or director. Date of birth, date of hire and assignment effective start and end dates are also included. Because employees may have multiple assignments, multiple current records may be returned per employee. However, the primary assignment is indicated. Results returned by this view may be sorted by Employee Name or Number, Cost Allocation, Job, Grade, Position, Location, Organization, Employment Category, (GRE) Government Reporting (legal) entity or Supervisor.

Note: U.S. reporting information related to EEO and FLSA requirements is contained in this view. To restrict results of your query to retrieve the primary assignment only, you may use Primary_Flag = 'Y'. This view returns results for a specific business group only. Security may be activated for this view by following the Oracle HRMS security profile model. Security profiles may be setup based on employee or applicant person types, as well as position, organization or payroll assignments. (For further information, please see the Noetix Views Installation Guide).

Business Group: NRECA

Sample – Column/Join List

The screenshot shows a web browser window titled "NoetixViews Help, Noetix Corporation". The browser's address bar and navigation buttons are visible. The main content area displays the "HR_Emp_Asg_Details Column List" with a list of columns and their descriptions. The list includes columns like Posd\$Position, Posd\$Position_Code, Posd\$Position_Flexfield, Previous_Last_Name, Primary_Flag, Probation_Period, Probation_Unit, Sal_Review_Period_Frequency, Salary_Review_Period, Set_Of_Books, Supervisor_Full_Name, Supervisor_Last_Name, Supervisor_Number, Time_Normal_Finish, Time_Normal_Start, Z\$\$, and Z\$HR_Emp_Asg_Details. Each entry provides a brief description of the column's data type and usage.

Noetix Views® HR_Emp_Asg_Details Column List [Help](#)

- Posd\$Position** Position Name Key Flexfields This column is a [segment of the Key Flexfield](#): Position Flexfield, it is segment: Position
- Posd\$Position_Code** Position Name Key Flexfields This column is a [segment of the Key Flexfield](#): Position Flexfield, it is segment: Position Code
- Posd\$Position_Flexfield** Position Name Key Flexfields This column is a [concatenation of all segments](#) in the Key Flexfield: Position Flexfield, the segments are: Position.Position Code.Future
- Previous_Last_Name** Employee's Previous Last Name
- Primary_Flag** Indicates If The Assignment Is Primary [Flag column](#)
- Probation_Period** Length Of Probation Period
- Probation_Unit** Person's Probation Unit
- Sal_Review_Period_Frequency** Salary Review Period Frequency [List of possible values](#) : "Days", "Hours", "Months", "Weeks", "Years"
- Salary_Review_Period** Length Of Time Between Salary Reviews
- Set_Of_Books** Set Of Books Name
- Supervisor_Full_Name** Supervisor's Full Name (Last Title First Middle)
- Supervisor_Last_Name** Supervisor's Last Name (Surname)
- Supervisor_Number** Supervisor's Employee Number
- Time_Normal_Finish** Work Day Normal End Time
- Time_Normal_Start** Work Day Normal Start Time
- Z\$\$** Columns following this are table rowids with values having meaning only internal to Oracle. Use them only to join to the view specified by the column name.
- Z\$HR_Emp_Asg_Details** [Join to Column](#) – use it only to join to other views Z\$ columns. Internal Oracle rowid for table PER_ALL_ASSIGNMENTS F.

Sample – Help Questions

Noetix | Views®

HR_Emp_Asg_Details

Examples

Here are typical questions people have about the data within the view HR_Emp_Asg_Details. Select a question to see a hint on how you can answer these questions using NoetixViews.

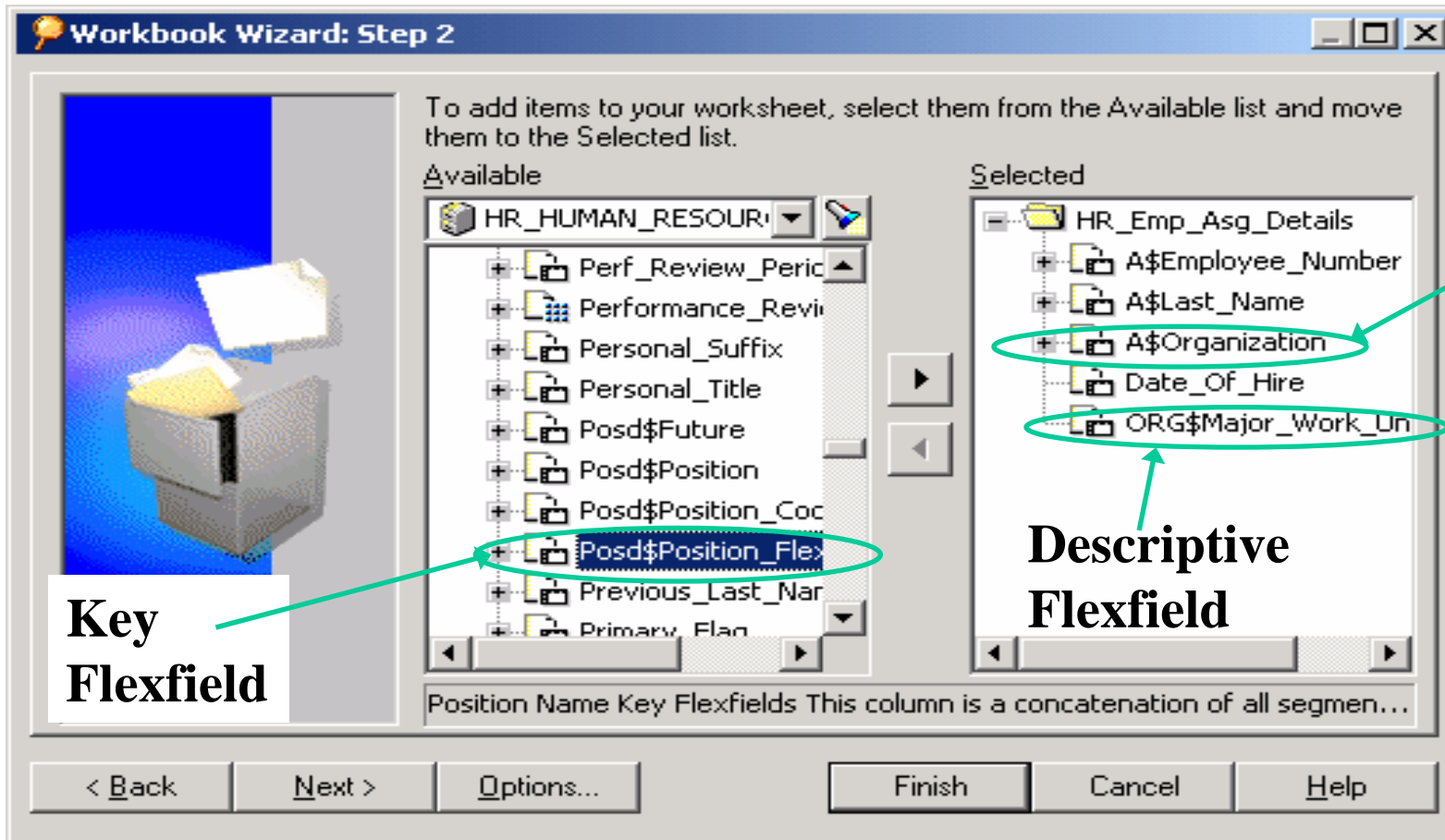
Hint: What are the details of each employee assignment for a given period?

Hint: What is the year to date total of employees by job and by organization?

Sample Report - Steps

- Walk through a simple ad hoc report using NoetixViews with Discoverer
- Contrast against NRECA-defined View
- Illustrate Indexed Column, Descriptive Flexfield
- Building Condition using LOV

Report Steps – Choose Fields (BI Discoverer Desktop)

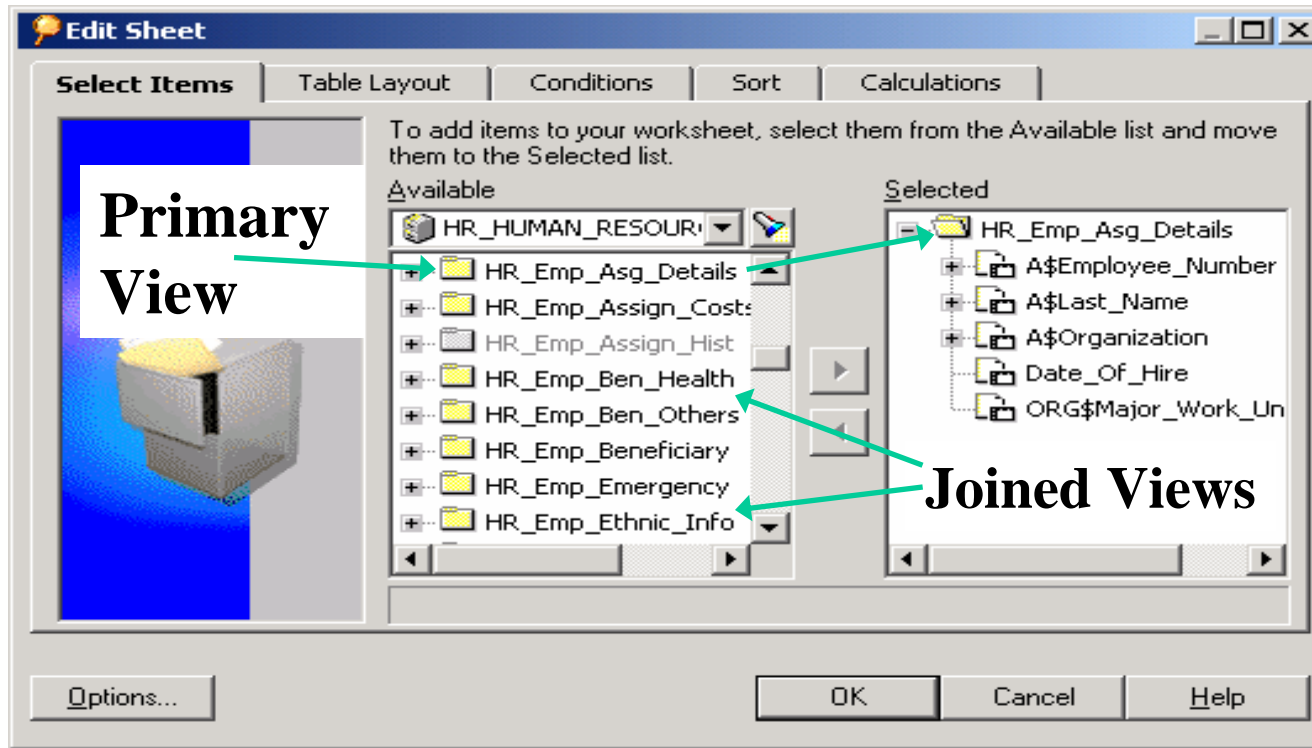


**Key
Flexfield**

**Indexed
Column**

**Descriptive
Flexfield**

Report Steps - Table Joins



Joined Views are available after choosing fields from a primary view

View Contrast – NRECA defined

Workbook Wizard: Step 2

To add items to your worksheet, select them from the Available list and move them to the Selected list.

Available

- NRECA HR and Payroll Views
 - Nreca Employee Banks
 - Nreca Extended Illness V
 - Nreca Pto Balance V**
 - Nreca Timecards

Selected

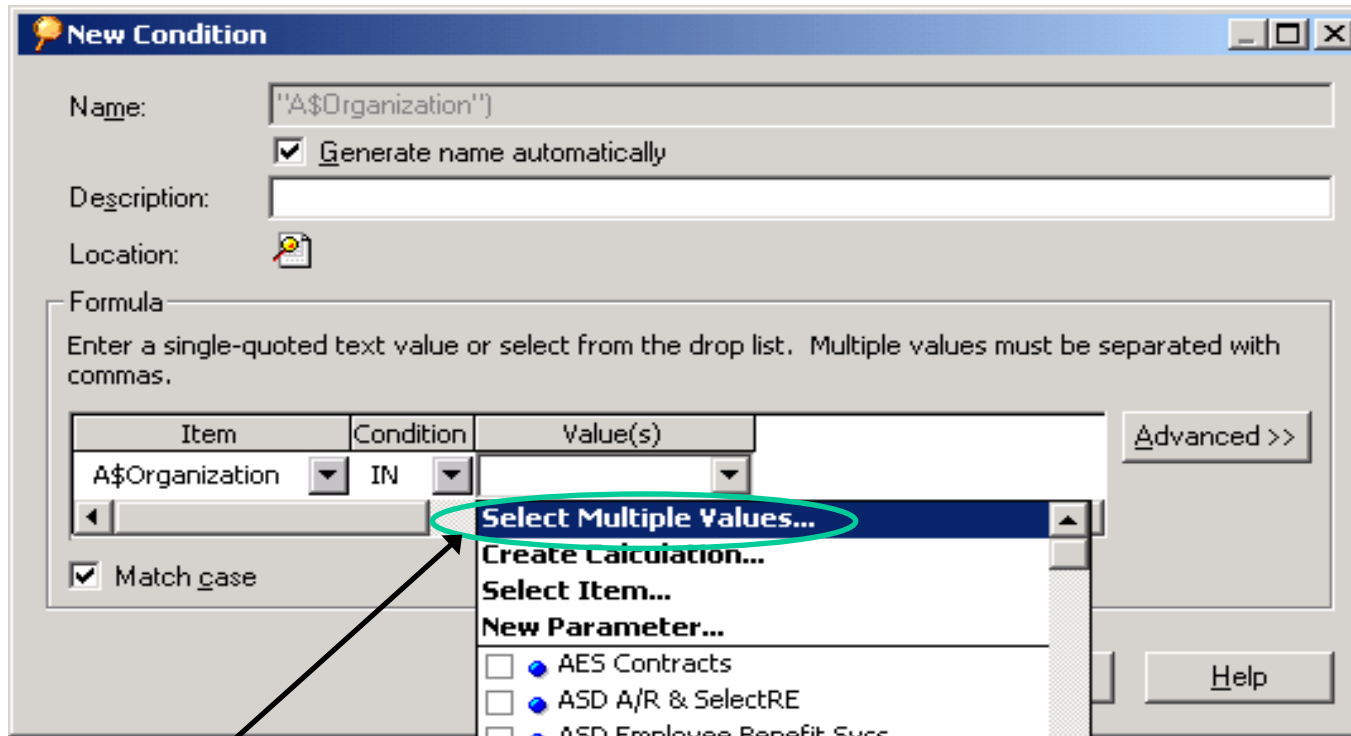
- Nreca Pto Balance V
 - A1 SUM
 - A2 SUM
 - A3 SUM
 - A4 SUM
 - SUM
 - Full Name
 - Date Of Hire
 - Supervisor Full Name
 - A\$Employee Number
 - Pto Accrued
 - SUM
 - Floating Holiday Usage
 - Adjusted Service Date
 - Report Through Date
 - A5
 - SUM
 - A6

Joins are not defined

Field Names are not well labeled

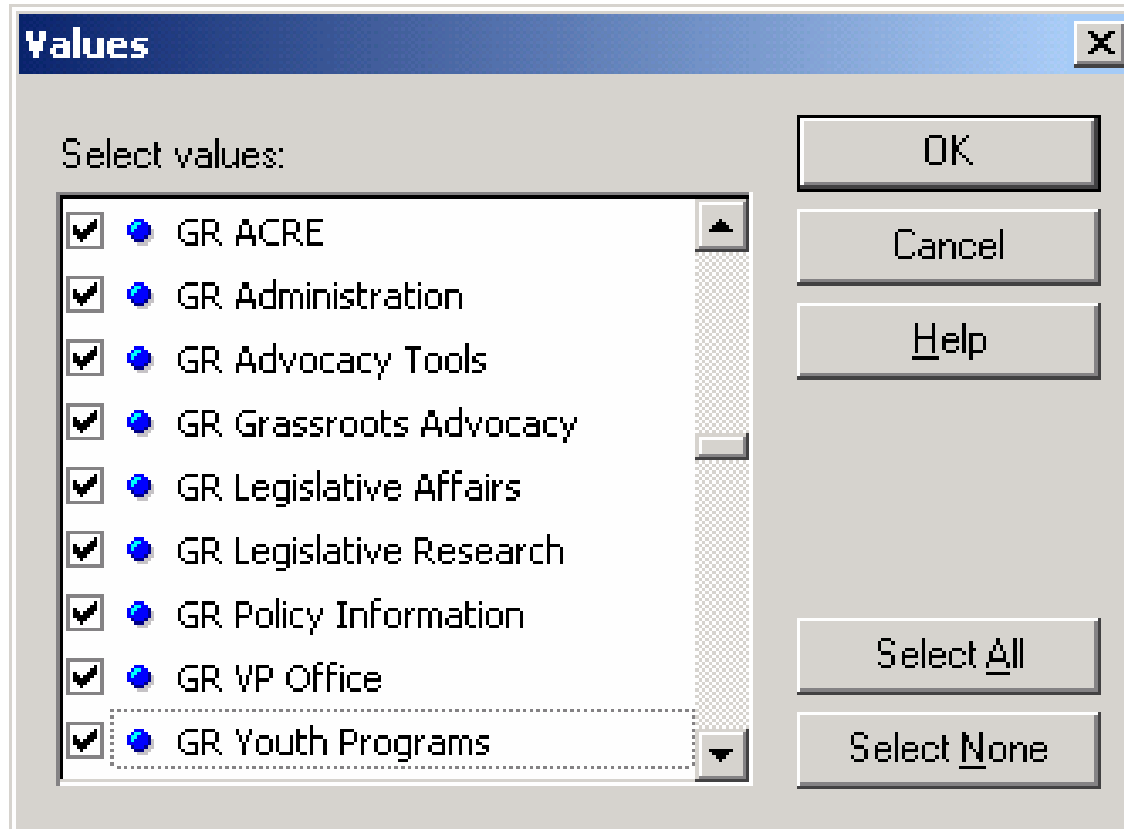
< Back Next > Options... Finish Cancel Help

Report Steps – Build Condition



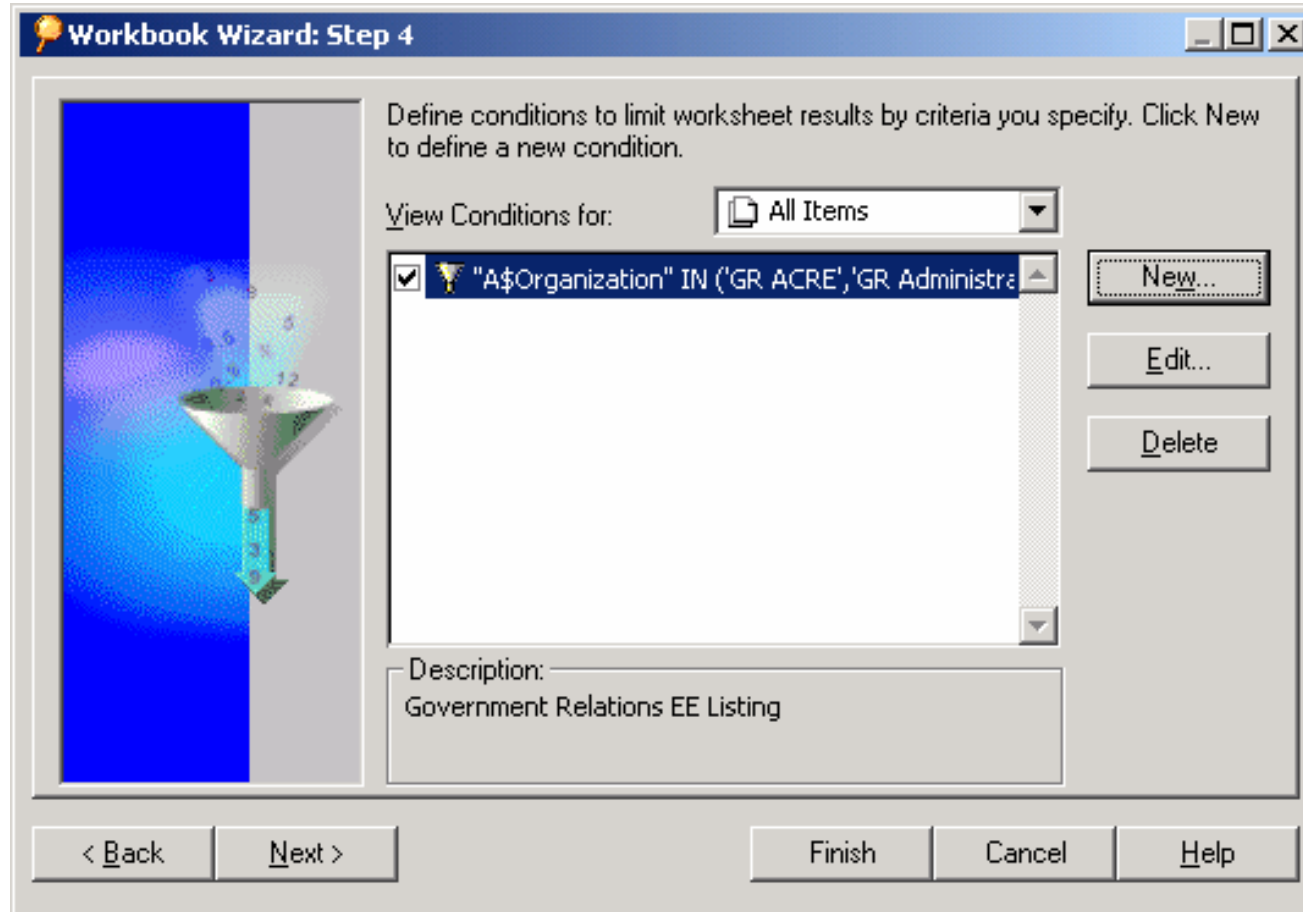
Allows user to “check” the Organizations to include

Report Steps - Condition



Selected Values

Report Steps – Final Condition



Report Steps - Sample Report

Oracle Discoverer - [Workbook1]

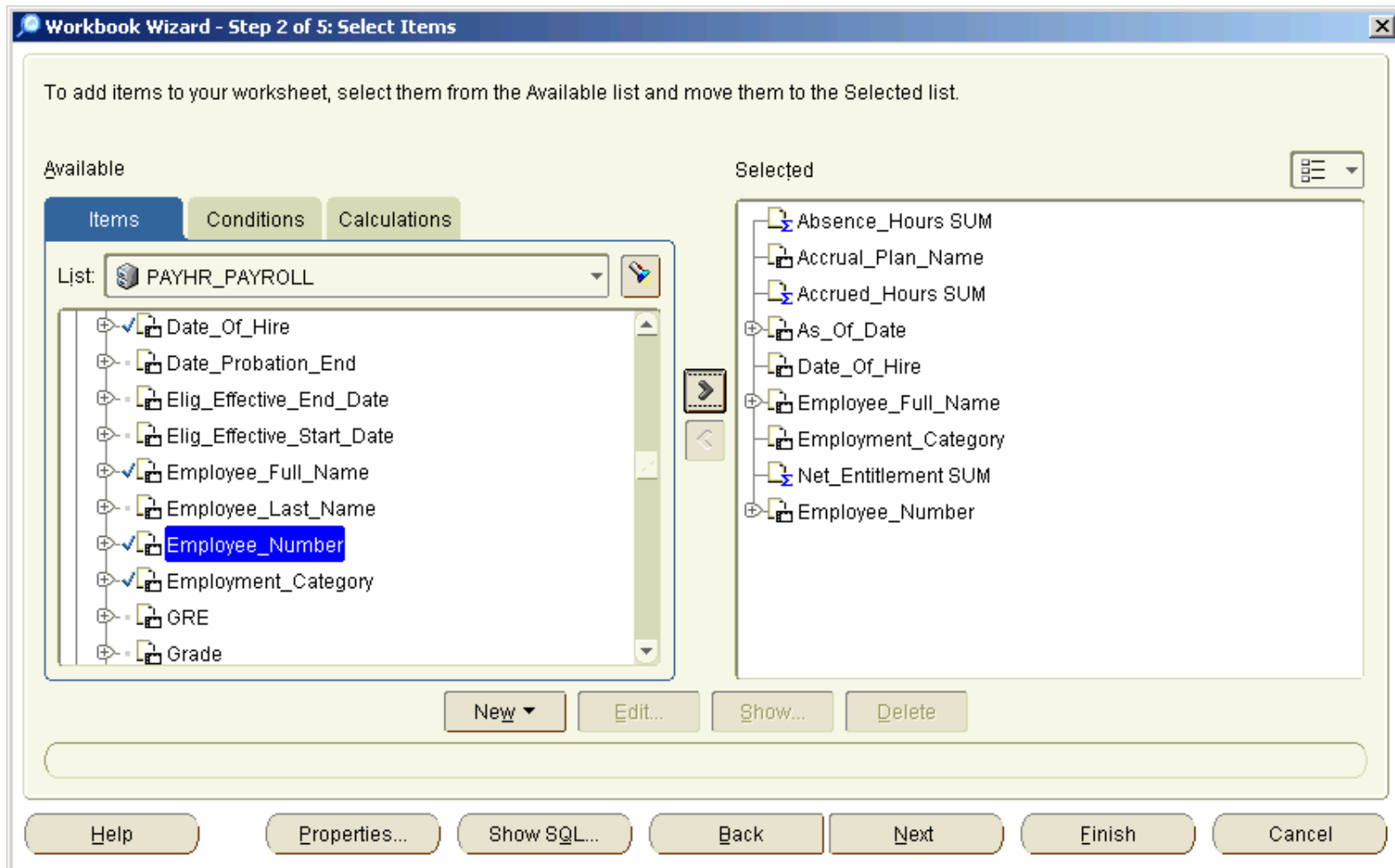
File Edit View Sheet Format Tools Graph Window Help

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	Employee Number	Last Name	Organization	Date Of Hire	Major Work Unit Code
1	62		GR ACRE	01-SEP-1977	GR
2	1388		GR ACRE	19-FEB-2002	GR
3	640		GR ACRE	31-MAR-1995	GR
4	335		GR Administration	09-MAR-1992	GR
5	450		GR Administration	06-JAN-1986	GR
6	1292		GR Administration	21-MAY-2001	GR
7	1313		GR Administration	02-JUL-2001	GR
8	1309		GR Administration	18-JUN-2001	GR
9	529		GR Administration	11-MAY-1970	GR
10	564		GR Advocacy Tools	08-FEB-1973	GR
11	499		GR Advocacy Tools	30-MAY-2000	GR
12	1346		GR Advocacy Tools	04-SEP-2001	GR
13	608		GR Advocacy Tools	17-JUL-2000	GR

Sheet 1 NUM

Choose Fields - BI Discoverer Plus



BI Discoverer Plus Report & Graph

2008 PTO Accrual Plan Hours, Absences & Entitlements - OracleBI Discoverer

File Edit View Format Tools Help

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Available Items:

Items Conditions Calculations

List: PAYHR_PAYROLL

- PAYHR_Accruals
 - A\$Accrual_Element_Name
 - A\$As_Of_Date
 - A\$Assignment_Number
 - A\$Employee_Full_Name
 - A\$Employee_Last_Name
 - A\$Employee_Number
 - A\$Social_Security_Number
 - Absence_Hours
 - Accrual_Category
 - Accrual_Description
 - Accrual_Effective_End_Date
 - Accrual_Effective_Start_Date

Selected Items:

- Absence_Hours SUM
- Accrual_Plan_Name
- Accrued_Hours SUM
- Net_Entitlement SUM
- PTO Accrual Plans
- "A\$As_Of_Date" = '20-DEC-2008'
- Current_Employee_Flag = 'Y'

Page Items: Accrual Plan Name: <All>

	Total Absence Hours	Accrued Hours SUM	Net Entitlement Hours
1	4,780.60	123,849.18	151,650.97

Sheet 1

BI Discoverer Plus Report - Benefits

The screenshot displays the Oracle BI Discoverer Plus interface for a report titled "Ben Enrts.DIS - OracleBI Discoverer". The interface includes a menu bar (File, Edit, View, Format, Tools, Help), a toolbar with various icons, and a formatting toolbar (SansSerif, 10, Bold, Underline, etc.).

Available Items:

- Items: BEN_BENE...
- Conditions: BEN_Ptnt_Enrollment, BEN_Ptnt_Flex_Credit

Selected Items:

- Life_Event
- Plan
- Plan_Type
- Employee Count
- "A\$As_Of_Date" = '01-JAN-
- Life_Event_Status = 'Proce

Page Items: Plan Type: Dental

Table Data:

Plan	Employee Count
Arl Dental	496.00
Decline Dental Coverage	67.00
Linc Dental	136.00

Bar Chart:

The bar chart visualizes the data from the table above, showing the Employee Count for each Plan Type. The Y-axis ranges from 0 to 600. The X-axis categories are Arl Dental, Decline Dental Coverage, and Linc Dental.

Sheet Navigation: Sheet 1, Sheet 2

Report Summary

- Ad-Hoc reports are easy to build and views/joins with NoetixViews are robust
- Views have same structure and are very consistent in naming columns between views
- Discoverer + NoetixViews is an effective solution for end-users that know the structure of the Oracle HR application

Lessons Learned

- Expectation that all HR staff would become proficient users was unrealistic
- Reality is few “super-users”
 - Most users modify and/or run pre-built reports
 - A few that never use the tools on their own

Lessons Learned

- Not everything works as we might have expected
 - Found that with smaller Application Lookups/lists of values, changes to the value sets did not always get picked up by NoetixViews without regenerating

Lessons Learned

- NoetixViews provided an excellent base for us to create custom views
 - Add columns to views, create additional joins, etc.
 - Maintain similar naming conventions and structures
 - Have an IT resource certified by Noetix to customize views
 - Customization must be done correctly to retain ease of maintenance

Lessons Learned

- Upgrading from Discoverer 4.x desktop to BI Discoverer 10g posed some challenges
 - Report Conversion
 - Report “database” between versions was not available
 - Reports we could not convert because they were “MIA” had to be rebuilt in some cases
 - Resistance to change
 - Casual-user training

Summary

- HR would not have the same level of data access had we chosen to build our own views or custom reports within the Oracle Application
- Solution of Discoverer with NoetixViews was fast and efficient in providing the information we needed when it was critical
- Continue to expand and build upon this solution as we have added HR modules

Summary

- HR is able to produce ad hoc and standard reports as needed and is essentially self-reliant
- Discoverer with NoetixViews is comprehensive and flexible enough for our HR reporting needs

Questions?