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# PeopleSoft Enterprise EPM 9.1 Fusion Campus Solutions Intelligence for PSFT Enterprise PeopleBook

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**April 2010**

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# Oracle's Fusion Campus Solutions Intelligence for PeopleSoft Enterprise 9.1 Preface

This chapter discusses:

- Oracle's Fusion Campus Solutions Intelligence application For PeopleSoft Enterprise products.
- Related documentation.
- Common elements used in this PeopleBook.

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## Oracle's Fusion Campus Solutions Intelligence For PeopleSoft Enterprise Products

This PeopleBook refers to these PeopleSoft EPM warehouses:

- PeopleSoft Enterprise Campus Solutions Warehouse
- PeopleSoft Enterprise Customer Relationship Management (CRM) Warehouse
- PeopleSoft Enterprise Financial Management Solutions (FMS) Warehouse
- PeopleSoft Enterprise Human Capital Management (HCM) Warehouse
- PeopleSoft Enterprise Supply Chain Management (SCM) Warehouse

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## Related Documentation

The Fusion Campus Solutions Intelligence for PeopleSoft Enterprise PeopleBook provides you with implementation information for the Fusion Campus Solutions Intelligence for PeopleSoft Enterprise product. Additional, essential information describing the setup and design of your system resides in companion documentation.

This table lists additional books that are cross-referenced in this PeopleBook:

| <b>Document</b>  | <b>Description</b>  |
|--|---|
| <i>Oracle Business Intelligence Infrastructure Installation and Configuration Guide</i>      | <p>This guide provides information on installing and configuring the infrastructure or platform components of Oracle Business Intelligence on approved operating system platforms and deployments. This release of the guide applies to infrastructure (platform) releases of Oracle Business Intelligence Enterprise Edition.</p> <p><b>Note.</b> The Oracle Business Intelligence Infrastructure Installer installs the platform components, not the applications components. Refer to the <i>Fusion Campus Solutions Intelligence For PeopleSoft Enterprise Supplemental Installation Instructions</i> to install the Fusion Campus Solution Intelligence application.</p> |
| <i>Oracle Business Intelligence Server Administration Guide</i>                              | <p>This is an infrastructure guide that contains post-installation and configuration content that pertains to setting up the Oracle Business Intelligence Server (Oracle BI Server). The guide discusses how to plan, create, and administer the physical, business model and mapping, and presentation layers in the Oracle BI Repository. The guide primarily covers tasks that are performed in the Oracle BI Administration Tool utility.</p>   |
| <i>Oracle Business Intelligence Presentation Services Administration Guide</i>               | <p>This guide provides post-installation configuration and administration procedures for Oracle BI Presentation Services, Oracle BI Answers, Oracle BI Delivers, Oracle BI Interactive Dashboards, and the Oracle BI Presentation Catalog and Catalog Manager. Additionally, the guide discusses Oracle BI Presentation Services security, logging, user interface, and integrations using HTTP.</p>  |
| <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide</i> | <p>This guide is for Oracle BI report and dashboard designers and end users of the Fusion Campus Solution Intelligence application.</p>   |
| <i>PeopleSoft Enterprise Performance Management Installation Guide</i>                       | <p>Chapter 3 of this guide, "Installing Oracle Fusion Campus Solutions Intelligence for PeopleSoft Enterprise" discusses how to install the components that are required to run the Fusion Campus Solution Intelligence application.</p>  |
| <i>PeopleSoft Enterprise Campus Solutions Warehouse PeopleBook</i>                           | <p>This book provides information necessary to implement the Campus Solutions Warehouse.</p>  |
| <i>PeopleSoft Enterprise Customer Relationship Management Warehouse PeopleBook</i>           | <p>This book provides information necessary to implement the Customer Relationship Management Warehouse.</p>  |
| <i>PeopleSoft Enterprise Financial Management Solutions Warehouse PeopleBook</i>             | <p>This book provides information necessary to implement the Financial Management Solutions Warehouse.</p>  |
| <i>PeopleSoft Enterprise Human Capital Management Warehouse PeopleBook</i>                   | <p>This book provides information necessary to implement the Human Capital Management Warehouse.</p>  |

| <b>Document</b>   | <b>Description</b>   |
|---|--|
| <i>PeopleSoft Enterprise Supply Chain Management Warehouse PeopleBook</i> | This book provides information necessary to implement the Supply Chain Management Warehouse. |

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**Note.** This PeopleBook documents only the delivered metadata, dashboards, reports, subject areas, and security setup for the Fusion Campus Solutions Intelligence for PeopleSoft Enterprise application. Before reading this PeopleBook, read the Oracle Business Intelligence Enterprise Edition documentation for information on the underlying architecture of the Fusion Campus Solution Intelligence application.

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## PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

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## Common Elements Used in This PeopleBook

### **Connection Pool**

An object in the physical layer of the repository that contains information about the connection between the Oracle BI Server and the data source.

|   |   |
|---|---|
| <b>Dimensions</b>   | Represents the organization of logical columns (attributes) that belong to a single logical dimension table. Examples of dimensions are Admit Type, Academic Program, Academic Plan, and Institution. In dimensions, you can organize attributes into hierarchical levels. These levels represent your institution reporting requirements.  |
| <b>Facts</b>  | Represents numeric performance measurement information (measures or calculated data), such as applicant count or admission percent, that can be specified in terms of dimensions. For example, you may want to determine the total number of enrollees for a specific school and career, for a specific term.   |
| <b>Filters and Prompts</b>  | <p>Filters are built into requests and are used to limit the results that appear on a dashboard. A report that appears on a dashboard shows only those results that match the filter criteria. Filters are applied on a column-level basis.</p> <p>Certain filters inherit the values that users specify in dashboard prompts. A prompt is another kind of filter that can apply to all items in a dashboard. Some prompts, such as date or period, can be common to all dashboards. Other prompts, such as admit type, are unique to a specific dashboard. Prompts are synonymous with parameters.</p> <p>See <i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide</i>, "Filtering Requests in Oracle BI Answers."</p> |
| <b>Folders</b>  | In the Oracle BI Presentation Services user interface, folders provide the ability to organize an Oracle BI Web Catalog and its contents, such as reports.  |
| <b>Guided Navigation</b>  | A link to navigate to the transaction processing application, another dashboard, or a URL. This link can be set up to appear conditionally based on the results of a report or key performance indicator.   |
| <b>Key Performance Indicators (KPIs)</b>                          | Strategic organizational factors that are used for reporting. KPIs are designed to monitor performance on strategic organizational factors such as enrollment or tuition amount.  |
| <b>Oracle Business Intelligence Answers (Oracle BI Answers)</b>   | A component within the Oracle BI Enterprise Edition technology that is used to create ad hoc queries into an organization's data. Oracle BI Answers provide a set of graphical tools to create and execute requests for information. Requests can be saved in the form of reports, and shared, modified, formatted, or embedded in a dashboard.   |
| <b>Oracle Business Intelligence Enterprise Edition (OBIEE)</b>    | A comprehensive suite of enterprise business intelligence products that contain the programs, servers, and tools to support broad, self-service access across the organization. OBIEE is the foundation for the Fusion Campus Solutions Intelligence application.   |
| <b>Oracle Business Intelligence Delivers (Oracle BI Delivers)</b> | A proactive intelligence solution that provides business activity monitoring and alerting for out-of-tolerance situations to target owners and subscribers.   |

|   |   |
|---|---|
| <b>Oracle Business Intelligence Interactive Dashboards (Oracle BI Interactive Dashboards)</b> | Collections of content that are designed to meet the needs of particular user roles. A dashboard is the user interface that provides a knowledge worker with intuitive, interactive access to information that is actionable and dynamically personalized, based on the individual's role and identity.                         |
| <b>Oracle Business Intelligence Presentation Catalog (Oracle BI Presentation Catalog)</b>     | A collection of subject areas that are defined in the metadata repository layer.  |
| <b>Requests (Reports)</b>   | The building blocks of business intelligence dashboards. Requests are created by using Oracle BI Answers to retrieve and display an organization's data. Data can be displayed in a variety of graphical formats. Links can be established in the chart or table of a report to launch another report to offer guided analysis. |



## Chapter 1

# Getting Started with Fusion Campus Solutions Intelligence for PeopleSoft Enterprise

This chapter discusses:

- Fusion Campus Solutions Intelligence for PeopleSoft Enterprise overview.
- Fusion Campus Solutions Intelligence integrations.

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## Fusion Campus Solutions Intelligence for PeopleSoft Enterprise Overview

The Fusion Campus Solutions Intelligence application provides you with prepackaged Oracle Business Intelligence Enterprise Edition (OBIEE) metadata, dashboards, and reports to help you quickly analyze key performance indicators for your institution and determine if you are on track to meet institutional goals. Dashboards and reports are presented in interactive charts, graphs, and grids. And certain reports enable you to drill down to the PeopleSoft transaction processing application to view transaction details and take corrective actions. Security rules ensure that personalized content is generated for specific users and roles. You can grant each role access to specific objects, such as subject areas, dashboards, and reports. Additionally, you can control access to specific data rows by using secured dimensions.

The Fusion Campus Solutions Intelligence application is built on a single, prebuilt metadata repository file (named *EPM91\_Master.rpd*) that consists of physical, business mapping, and presentation metadata layers that contain common definitions of metrics, hierarchies, and calculations against data stored in the following EPM warehouses:

- PeopleSoft Enterprise Campus Solutions Warehouse
- PeopleSoft Enterprise Customer Relationship Management (CRM) Warehouse
- PeopleSoft Enterprise Financial Management Solutions (FMS) Warehouse
- PeopleSoft Enterprise Human Capital Management (HCM) Warehouse
- PeopleSoft Enterprise Supply Chain Management (SCM) Warehouse

The servers, programs, and tools in OBIEE provide the infrastructure foundation for the Fusion Campus Solutions Intelligence application. The content of the delivered metadata repository file are objects in OBIEE. Oracle BI Answers, Delivers, and Interactive Dashboards are used to create the dashboards and reports.

The powerful metadata content that PeopleSoft delivers helps eliminate the need for you to have to create complex mappings, templates, dashboards, and reports for your EPM warehouses.

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**Note.** The Fusion Campus Solutions Intelligence application is primarily designed for the Higher Education Industry.

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See *PeopleSoft Enterprise Campus Solutions Warehouse 9.1 PeopleBook*, "PeopleSoft Enterprise Campus Solutions Warehouse Preface."

See *PeopleSoft Enterprise Customer Relationship Management Warehouse 9.1 PeopleBook*, "PeopleSoft Enterprise Customer Relationship Management Warehouse Preface."

See *PeopleSoft Enterprise Human Capital Management Warehouse 9.1 PeopleBook*, "PeopleSoft Enterprise Human Capital Management Warehouse Preface."

See *PeopleSoft Enterprise Supply Chain Management Warehouse 9.1 PeopleBook*, "PeopleSoft Enterprise Supply Chain Management Warehouse Preface."

See *PeopleSoft Enterprise Financial Management Solutions Warehouse 9.1 PeopleBook*, "PeopleSoft Enterprise Financial Management Solutions Warehouse Preface."

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## Fusion Campus Solutions Intelligence for PeopleSoft Enterprise Integrations

The key integration points between the Fusion Campus Solutions Intelligence application, the EPM warehouses, and the PeopleSoft source transaction systems are:

- Single signon with user identity management.

For example, you can sign onto the Fusion Campus Solutions Intelligence for PeopleSoft Enterprise application and drill from dashboard reports into source transactions in the Campus Solutions transaction application, without encountering the PeopleSoft signon page.

- Security at the object and data level.

The Fusion Campus Solutions Intelligence for PeopleSoft Enterprise application honors the data-level security that you set up in EPM.

Additionally, you can set up object-level security by creating security groups in the application to match user roles in EPM.

- Drill between dashboards and the PeopleSoft transaction application.

You can click a link in an interactive dashboard or report to drill to a PeopleSoft transaction page in a new browser window for more details, while maintaining the data and security.

- Synchronized data model.

A guided drill path is built into the analytic model so you can view aggregated data to understand trends. From summary reports, you can drill in place to detailed reports to investigate exceptions or problems. From there you can drill to the underlying transaction system to act upon the source data to resolve problems.



## Chapter 2

# Understanding Fusion Campus Solutions Intelligence

This chapter lists prerequisites and discusses:

- Fusion Campus Solutions Intelligence architecture.
- Oracle BI Administration Tool.
- Oracle BI Presentation Services.
- Roles.
- Navigation.
- Reporting tools.
- Request filters.
- Fusion Campus Solutions Intelligence setup.
- Cache management.

---

## Prerequisites

The following software is required to use the Fusion Campus Solutions Intelligence for PeopleSoft Enterprise application with the EPM database. You must complete the installation of this software before you implement the Fusion Campus Solutions Intelligence application:

- PeopleSoft Enterprise Campus Solutions Warehouse 9.1.

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**Note.** (Optional) License the PeopleSoft Enterprise Customer Relationship Management, Financial Management Solutions, Human Capital Management, and Supply Chain Management warehouses.

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- Oracle Business Intelligence Enterprise Edition, release 10.1.3.4.1.

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**Note.** Select the *Oracle Application Server* option.

---

- Oracle Application Server.

- Oracle Application Server infrastructure components:
  - Oracle Internet Directory (LDAP Server).
  - Oracle Single Signon Server.

See *PeopleSoft Enterprise Performance Management Installation Guide*.

See *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*

See *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*, "Oracle's PeopleSoft Enterprise Performance Management Fundamentals 9.1 Preface."

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## Fusion Campus Solutions Intelligence Application Setup

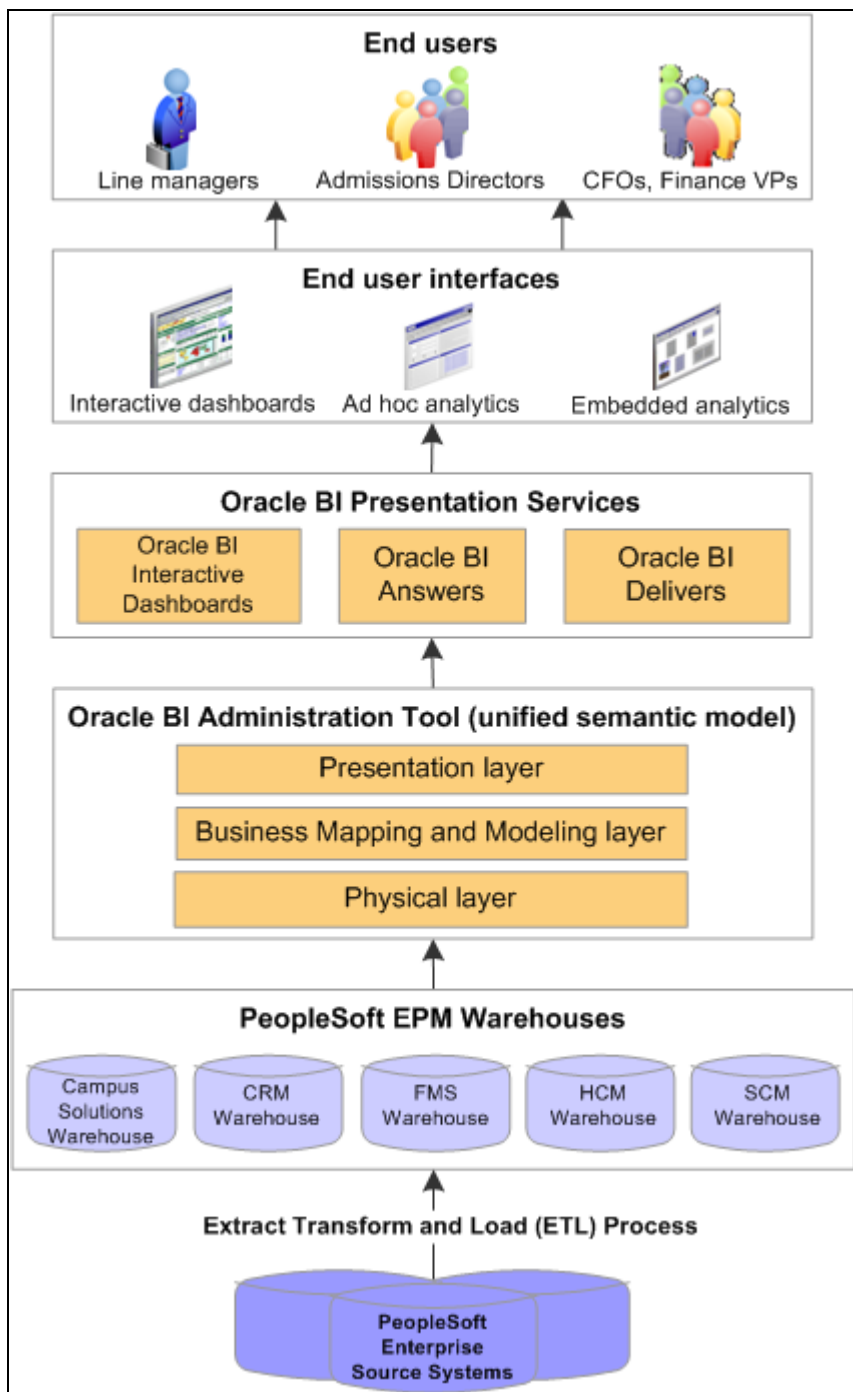
The high level steps that you will complete to set up the Fusion Campus Solutions Intelligence application are:

1. Configure OBIEE environment for the Fusion Campus Solutions Intelligence application.
2. Run the delivered update SQL scripts in EPM to enable the drill in place functionality to PeopleSoft applications.
3. Set up EPM data-level security.
4. Configure desired new dimensional hierarchies in OBIEE as needed.
5. Configure single signon between the online transaction processing application, EPM, and OBIEE.
6. Review the delivered OBIEE dashboard data-level security and enable additional dashboard data-level security in OBIEE as needed.

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## Fusion Campus Solutions Intelligence Architecture

This diagram depicts the relationship between PeopleSoft source systems, the EPM warehouses, Oracle BI components (such as Oracle Answers, Oracle Delivers, and the Administrator Tool), and interactive dashboards provided with the Fusion Campus Solutions Intelligence application:



Fusion Campus Solutions Intelligence architecture

## Oracle BI Administration Tool

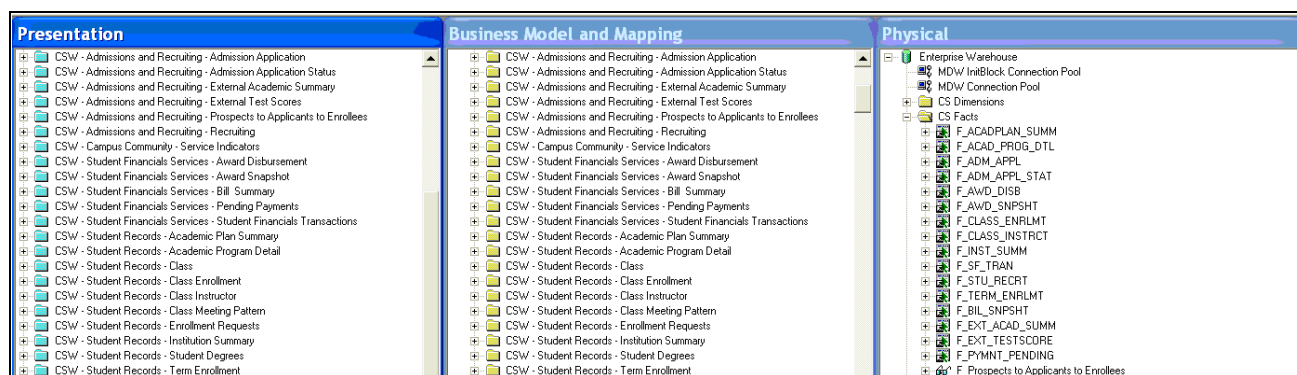
This section discusses the:

- Repository file

- Physical layer
- Business Model and Mapping layer
- Presentation layer

## Repository File

Prebuilt metadata content is maintained in the metadata repository file named EPM91\_Master.rpd. The repository contains the Physical, Business Model and Mapping, and Presentation layers that are discussed in the following sections. The Oracle BI Administration Tool is the user interface into the layers in the repository, as shown in this example:



Oracle BI Administration Tool

## Consistency Check

The *Oracle Business Intelligence Server Administration Guide* discusses consistency checks that you must perform on repository metadata before you make the repository available for queries.

## Physical Layer

A Physical table is an object in the Physical layer of the Oracle BI Administration Tool that corresponds to an object in a Physical database. The Physical layer folder stores the shortcuts (references) to physical tables. Physical tables are typically imported from a database or another data source, and they provide the metadata necessary for the Oracle BI Server to access the tables. The Physical layer represents the physical structure of the data sources to which the Oracle BI Server submits queries.

A physical object in OBIEE can also be based on an SQL query.

## Connection Pools

In Fusion Campus Solutions Intelligence application, the EPM warehouses provide the data source for the Physical layer. A Physical layer can have multiple data sources. Each data source must have at least one corresponding connection pool, which contains data source information that the system uses to connect to a data source, the number of connections allowed, timeout information, and other connectivity-related administrative details. Connection pools allow multiple concurrent data source requests (queries) to share a single database connection, reducing the overhead of connecting to a database.

The Fusion Campus Solutions Intelligence application delivers two connection pools—MDW (multidimensional warehouse) Connection Pool and MDW Init Block Connection Pool. For performance reasons, the system uses the MDW InitBlock connection pool exclusively for initialization blocks. The dedicated connection pool contains these default properties:

| <b>Property</b>           | <b>Value</b>                  |
|---------------------------|-------------------------------|
| Name                      | MDW InitBlock Connection Pool |
| Call Interface            | Default (OCI 8i/9i)           |
| Data Source Name          | <customer specific>           |
| Shared Logon              | Yes                           |
| User Name                 | <customer specific>           |
| Password                  | <customer specific>           |
| Enable Connection Pooling | Yes                           |
| Parameters Supported      | Yes                           |

See *Oracle Business Intelligence Server Administration Guide*, "Creating and Administering the Physical Layer in an Oracle BI Repository," Setting Up Connection Pools.

### **Initialization Blocks**

The system uses initialization blocks to initialize dynamic repository variables, system session variables, and nonsystem session variables. This table lists the initialization blocks that are delivered with the Fusion Campus Solutions Intelligence application:

| <b>Name</b>                    | <b>Query</b>  | <b>Variable Name</b> | <b>Type</b>        |
|--------------------------------|---|----------------------|--------------------|
| Admission Application PIA page | SELECT A.URI    B.URL<br>FROM<br>PS_SRC_CONFIG A,<br>PS_SRC_COMPONENT B<br>WHERE A.SRC_SYS_ID =<br>B.SRC_SYS_ID<br>AND A.SRC_SYS_ID = 'HCM'<br>AND B.COMPONENT_ID=<br>'ADM_APPL_PROG_MNT' | ADM_APPL_PROG_MNT_PG | Dynamic Repository |
| Job Summary PIA page           | SELECT A.URI    B.URL<br>FROM PS_SRC_CONFIG A,<br>PS_SRC_COMPONENT B<br>WHERE A.SRC_SYS_ID =<br>B.SRC_SYS_ID<br>AND A.SRC_SYS_ID = 'HCM'<br>AND B.COMPONENT_ID=<br>'JOB_SUMMARY'          | JOB_SUMMARY_PG       | Dynamic Repository |

| <b>Name</b>                         | <b>Query</b>  | <b>Variable Name</b> | <b>Type</b>        |
|-------------------------------------|---|----------------------|--------------------|
| Journal Entries PIA page            | SELECT A.URI    B.URL<br>FROM PS_SRC_CONFIG A,<br>PS_SRC_COMPONENT B<br>WHERE A.SRC_SYS_ID =<br>B.SRC_SYS_ID<br>AND A.SRC_SYS_ID = 'FSCM'<br>AND B.COMPONENT_ID=<br>'JOURNAL_ENTRY'   | JOURNAL_ENTRY_PG     | Dynamic Repository |
| Overdue Scheduled Payments PIA page | SELECT A.URI    B.URL<br>FROM PS_SRC_CONFIG A,<br>PS_SRC_COMPONENT B<br>WHERE A.SRC_SYS_ID=<br>B.SRC_SYS_ID<br>AND A.SRC_SYS_ID='FSCM'<br>AND B.COMPONENT_ID=<br>'VNDR_PAYINQ_OVRDUE' | VNDR_PAYINQ_OVRDUE   | Dynamic Repository |
| None, defaulted to 2006             |   | CURRENT_YEAR         | Static Repository  |
| None                                | CURRENT_YEAR - 1  | ONE_YEAR_PRIOR       | Static Repository  |
| None                                | CURRENT_YEAR - 2  | TWO_YEAR_PRIOR       | Static Repository  |
| None                                | CURRENT_YEAR - 3  | THREE_YEAR_PRIOR     | Static Repository  |
| None                                | CURRENT_YEAR - 4  | FOUR_YEAR_PRIOR      | Static Repository  |
| None                                | CURRENT_YEAR - 5  | FIVE_YEAR_PRIOR      | Static Repository  |

### **Global Dimensions**

Global dimensions are used by more than one mart within a functional warehouse, and across functional warehouses, to provide you with a consistent view of the data. The Physical layer stores global dimension tables in the Global Dimensions folder. Examples of global dimensions are calendar, time, and business unit.

### **System Table**

The fact table named *ZZZ* is a logical table that is used for system purposes.

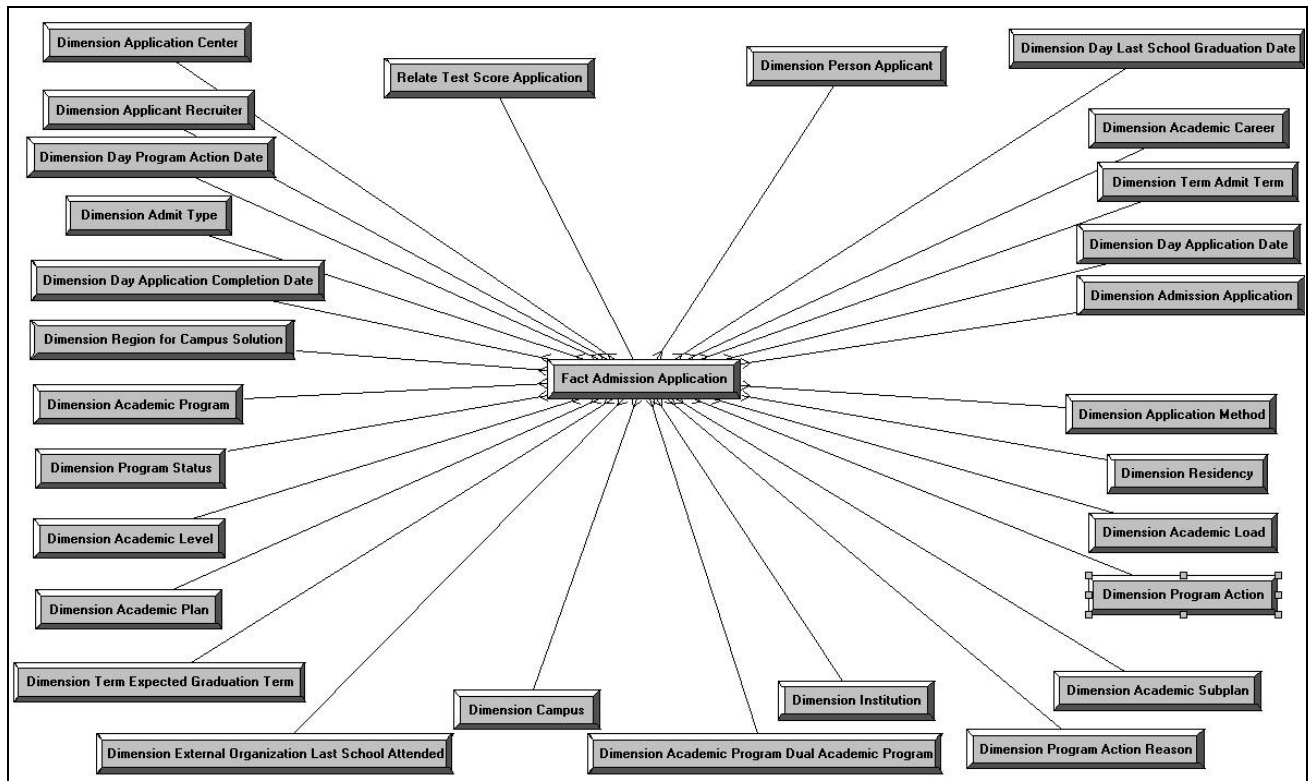
## **Business Model and Mapping Layer**

The Business Model and Mapping layer represents the logical structure of the information in the repository. The physical schemas are simplified and reorganized based on the users' view of the data. The business models contain logical columns arranged in logical tables (logical dimension tables and logical fact tables), logical joins, and dimensional hierarchy definitions. This layer also contains the mappings from the logical columns to the source data in the Physical layer.

The Business Model and Mapping layer appears in the middle pane of the Oracle BI Administration Tool.

Generally, each logical display folder in this layer represents a business area. Each folder has a shortcut (reference) to all of the logical dimension and fact tables that are joined together in a star schema. For example, CSW – Admissions and Recruiting – Admission Application is the name of a logical display folder. It contains the logical fact table named Fact Admission Application, and related logical dimension tables. The logical display folder should contain all of the dimensions and facts that are required for the given star schema.

The following graphic represents the star schema for the CSW – Admissions and Recruiting – Admission Application logical folder:



CSW – Admissions and Recruiting – Admission Application star schema

### ***Dimensional Hierarchies***

Some of the results that appear in the Fusion Campus Solutions Intelligence application represent hierarchical data structures. A hierarchy is a set of parent-child relationships between certain attributes within a dimension. The hierarchy attributes, called levels, roll up from child to parent. For example, months can roll up to years. Therefore, if an aggregate table exists at the month level, that table can be used to answer questions at the year level by summing all of the month-level data for a year.

The dimensional hierarchies in the Business Model and Mapping layer are either inherited from the dimensional hierarchies that exist in PeopleSoft source system data structures, or created specifically to support the delivered dashboard functionality. The Fusion Campus Solutions Intelligence application delivers metadata with these prebuilt hierarchies:

| <b>EPM Warehouse</b>           | <b>Hierarchical Dimension</b>  | <b>Table</b>   |
|--------------------------------|--|--|
| Campus Solutions               | Institution<br>Academic Plan<br>Academic Program<br>Academic Organization<br>Term<br>Day | D_INSTITUTION<br>D_ACAD_PLAN<br>D_ACAD_PROG<br>H_ACAD_ORG<br>D_TERM<br>D_DAY |
| Financial Management Solutions | Account<br>Department<br>Product<br>Day<br>Business Unit                                 | H_ACCOUNT<br>H_DEPT<br>D_PRODUCT<br>D_DAY<br>D_BUSINESS_UNIT                 |
| Human Capital Management       | Department<br>Geography<br>Day   | H_DEPT<br>H_GEO<br>D_DAY   |
| Supply Chain Management        | Commodity<br>Supplier<br>Business Unit<br>Day  | D_COMMODITY<br>D_SUPPLIER<br>D_BUSINESS_UNIT<br>D_DAY                        |

### ***Degenerate Dimensions***

A fact table may contain columns that cannot be aggregated, such as application number, application program number, and student career number that act as dimension attributes. In the Business Model and Mapping layer, these columns reside in a separate logical dimension folder named *Dimension <Fact table name >*. The logical fact folder (named *Fact <Fact table name >*) and the logical dimension folder (named *Dimension <Fact table name >*) both use the same physical source table.

For example, the F\_ADM\_APL fact table in the Physical layer contains these columns that cannot be aggregated

- Application Number
- Application Program Number
- Student Career Number

In this example, the F\_ADM\_APL fact table is represented by two logical tables in the Business Model and Mapping layer: the Fact Admission Application table and the Dimension Admission Application table. Dimension Admission Application is the degenerate dimension. The Dimension Admission Application table contains the degenerate dimensions from the F\_ADM\_APL fact table.

The Presentation table that hosts the degenerate attributes is called Document Details.



## Presentation Layer

The Presentation layer simplifies the business model and makes it easy for users to understand and query. It exposes only the data that is meaningful to the users, and organizes the data in a way that aligns with the way that users think about the data. The Presentation layer represents subject areas. This layer provides a way to present a customized view of a business model, known as Presentation catalog, to different sets of users. The Presentation layer appears in the left pane of the Oracle BI Administration Tool and contains a group of subject areas that represent information about your institution or groups of users within your institution.

The subject area appears in the workspace when you click the Answers link from any location in the OBIEE application. Subject area names correspond to the types of information that they contain. For example, the metadata for the CSW subject area maps to data in the Campus Solutions Warehouse.

### ***Campus Solutions***

The delivered OBIEE metadata provides insight into information in these Campus Solutions Warehouse data marts and subject areas:

| <b><i>Campus Solutions Warehouse Data Mart</i></b> | <b><i>Subject Area</i></b>   |
|--|--|
| Admissions and Recruiting                          | Admission Application<br>Admission Application Status<br>Admission Funnel<br>Application Evaluation<br>Student Recruiting<br>Test Scores<br>External Academic Summary<br>Student Responses |
| Campus Community                                   | Campus Events<br>Event Meetings<br>Organization Check List<br>Organization Communications<br>Person Check List<br>Person Communications<br>Service Indicators                              |

| <b><i>Campus Solutions Warehouse Data Mart</i></b> | <b><i>Subject Area</i></b>  |
|--|---|
| Student Financial Services                         | Award Disbursement<br>Award Snapshot<br>Bill Summary<br>Credit History<br>Payment and Charges Cross Reference<br>Pending Payments<br>Student Financials Accounting Line<br>Student Financials Payment Details<br>Student Financials Transactions<br>Student Financials Transactions Details |
| Student Records                                    | Academic Plan Summary<br>Academic Program Detail<br>Class Enrollment<br>Class Instructor<br>Class Meeting Pattern<br>Enrollment Requests<br>Institution Summary<br>Student Degrees<br>Term Enrollment   |

See *PeopleSoft Enterprise Campus Solutions Warehouse 9.1 PeopleBook*, "PeopleSoft Enterprise Campus Solutions Warehouse Preface."

See [Chapter 5, "Working with Delivered OBIEE Dashboards for the Campus Solutions Warehouse," page 57](#)

.

### ***Financial Management Solutions***

The delivered OBIEE metadata provides insight into information in these FMS Warehouse data marts and subject areas:

| <b><i>FMS Warehouse Data Mart</i></b> | <b><i>Subject Area</i></b>   |
|---------------------------------------|--|
| Enterprise Service Automation         | Contract Amendments<br>Contract Distributions<br>Contract Forecast Current<br>Contract Forecast Periodic<br>Contract Renewals<br>Contract Revenue Recognition<br>Contract Transactions<br>Current Projects<br>Employee Forecast<br>Expense Distributions<br>Expense Report Approvals<br>Grants Management Award<br>Grants Management Project Transaction<br>Grants Management Proposal<br>Grants Management Proposal and Award Summary<br>Periodic Projects<br>Project Changes<br>Project Current Activities<br>Project Deliverables<br>Project Issues<br>Project Periodic Activities<br>Project Transactions<br>Resource Assignments<br>Resource Rates<br>Resource Time Reports<br>Service Orders |

| <b>FMS Warehouse Data Mart</b>   | <b>Subject Area</b>   |
|----------------------------------|---|
| General Ledger and Profitability | Aggregated Balance<br>Journal Entries<br>Period Balances<br>Profitability Analysis<br>Commitment Control Activity Log<br>Commitment Control Activity Log Fund Source<br>Commitment Control Journal<br>Commitment Control Budget Association<br>Commitment Control Budget Balances<br>Commitment Control Detailed Ledger<br>Commitment Control Encumbrance<br>Commitment Control Exception<br>Commitment Control Fund Source Allocation<br>Commitment Control Fund Source Received<br>Commitment Control Overrides<br>Commitment Control Transaction Log |
| Global Consolidations            | Consolidation Ledger<br>Flows   |
| Payables                         | Account Entries<br>Aging Process<br>Ledger<br>Voucher Match Exceptions<br>Vouchers and Payments   |
| Receivables                      | Account Entries<br>Aging Process<br>Credit Limit<br>Customer and Vendor Netting<br>Customer Ledger<br>Days Sales Outstanding<br>Items and Receipts  |

See *PeopleSoft Enterprise Financial Management Solutions Warehouse 9.1 PeopleBook*, "PeopleSoft Enterprise Financial Management Solutions Warehouse Preface."

See Chapter 6, "Working with Delivered OBIEE Dashboards for the Financial Management Solutions (FMS) Warehouse," page 105.

## Human Capital Management

The delivered OBIEE metadata provides insight into information in these HCM Warehouse data marts and subject areas:

| <b>HCM Warehouse Data Mart</b> | <b>Subject Area</b>   |
|--------------------------------|---|
| Compensation                   | Absence<br>Absence Accrual<br>Absence Event<br>Absence Request<br>Benefit Enrollment<br>Global Payroll<br>Leave Accrual<br>Payroll Deduction<br>Payroll Deduction Balance<br>Payroll Earnings<br>Payroll Earnings Balance<br>Payroll Other Earnings   |
| Learning                       | Accomplishment<br>Activity Cost<br>Completion<br>Current Accomplishment<br>Current Competency<br>Employee Appraisal<br>Employee Review<br>Enrollment<br>Learning Objective<br>Learning Resource<br>Person Competency<br>Program Registration<br>Training<br>Training Course Session Expense |
| Recruiting                     | Recruitment Expenses<br>Recruitment Tracking  |

| <b>HCM Warehouse Data Mart</b> | <b>Subject Area</b>  |
|--------------------------------|--|
| Workforce                      | Benchmark Survey<br>Disciplinary Action<br>Employee Job<br>Grievance<br>Injury Illness<br>Time And Labor<br>Workforce Movement Activity<br>Workforce Profile |

See *PeopleSoft Enterprise Human Capital Management Warehouse 9.1 PeopleBook*, "PeopleSoft Enterprise Human Capital Management Warehouse Preface."

See [Chapter 7, "Working with Delivered OBIEE Dashboards for the Human Capital Management \(HCM\) Warehouse," page 121.](#)

### **Supply Chain Management**

The delivered OBIEE metadata provides insight into information in these SCM Warehouse data marts and subject areas:

| <b>SCM Warehouse Data Mart</b> | <b>Subject Area</b>   |
|--------------------------------|---|
| Spend                          | Voucher<br>Voucher Line<br>Voucher Distribution Line  |
| Fulfillment and Billing        | Billing<br>Booking Billing and Backlog<br>Bookings<br>Kit<br>Order To Cash Cycle Time<br>Return Material Authorization Received<br>Sales Order<br>Sales Order Line<br>Sales Order Line Ship |
| Inventory                      | History Sum Ledger<br>Inventory Cycle Count<br>Inventory Ledger<br>Inventory Transaction<br>Physical Inventory  |

| <b>SCM Warehouse Data Mart</b> | <b>Subject Area</b>  |
|--------------------------------|--|
| Manufacturing                  | Work Center Master<br>Work Center Resource Unit<br>Work Order Master<br>Work Order Part List<br>Work Order Production Cost<br>Work Order Routing<br>Work Order Time Transaction  |
| Procurement                    | Matching Analysis<br>Procurement Cycle Time Analysis<br>Purchase Order Disposition<br>Purchase Order Distribution<br>Purchase Order Line<br>Purchase Order Line Multiple Accounts<br>Purchase Order Receipt and Voucher<br>Purchase Order Receipt and Voucher Multiple Accounts<br>Purchase Order Received Shipment<br>Requisition Analysis<br>Requisition Line<br>Return to Vendor<br>Return to Vendor Distribution |
| Supply Chain Planning          | Inventory<br>Inventory Transfer<br>Production<br>Production Capacity<br>Purchasing<br>Sales Actual<br>Sales Forecast   |

See *PeopleSoft Enterprise Supply Chain Management Warehouse 9.1 PeopleBook*, "PeopleSoft Enterprise Supply Chain Management Warehouse Preface."

See [Chapter 8, "Working with Delivered OBIEE Dashboards for the Supply Chain Management \(SCM\) Warehouse," page 205](#) and [Chapter 8, "Working with Delivered OBIEE Dashboards for the Supply Chain Management \(SCM\) Warehouse," page 205](#).

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## Oracle BI Presentation Services

This section discusses:

- Oracle BI Answers
- Oracle BI Dashboards
- Web Catalog Folder

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

## Oracle BI Answers

Oracle BI Answers is a user interface that is part of the Oracle BI Presentation Services component of Oracle BI Intelligence.

Oracle BI Answers is the embedded reporting tool that allows users with the appropriate permissions to build and modify reports that let end users explore and interact with information, and drill in place to source data. The Fusion Campus Solutions Intelligence application contains prebuilt reports that are generated from metadata in the repository, which is mapped to metadata in EPM warehouses. You can access these reports either from the delivered dashboards, or from the Oracle Answers Catalog pane on the Oracle Answers page.

On the Oracle Answers page, you can also access the subject area folders that coincide with Oracle BI Presentation Catalog folders. The fact and dimension folders and columns appear in a subject area folder, just as they do in the Presentation Catalog.

### See Also

*Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, "Basics of Working with Requests in Oracle BI Answers"

## Oracle BI Dashboards

The Oracle BI Dashboards user interface is part of the Oracle BI Presentation Services component of Oracle BI Intelligence.

Interactive Dashboards provide points of access for analytics information. A dashboard is made up of sections of information that can contain items such as results from Oracle BI Answers, external Web content, HTML text, graphics, and links to other dashboards. Dashboard content is logically organized into pages. The pages appear as tabs across the top of the screen in Oracle BI Interactive Dashboards.

A dashboard page is designed to meet the needs of a particular role. For example, the Admissions and Recruiting Analysis dashboard page is designed for campus recruiters who want to analyze recruiting effectiveness and admission trends.

To access a dashboard, your PeopleSoft user ID must be assigned to the appropriate Presentation Catalog group in Oracle BI Intelligence. Your PeopleSoft application security settings determine the data that you can see on each dashboard. For example, managers can view performance activity only for the business units and departments for which they are responsible.

Every dashboard or report can have a set of prompts that determine the data that appears. When you change the value of a prompt on a dashboard, and click the Go button, the system automatically refreshes the data on the dashboard. Changing a prompt can affect the amount of data, the column headings, the KPI values, and the graph formats.



See [Chapter 3, "Setting Up Security," page 23.](#)

### See Also

*Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, "Using Oracle BI Interactive Dashboards"

## Web Catalog Folder

The Oracle BI Web Catalog stores the application dashboards and report definitions, and contains information regarding permissions and accessibility of the dashboards by groups. Prebuilt web catalog content is maintained in the folder named *EPMMaster*.

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## Roles

A user's role in the organization controls the user's access to objects (such as dashboards, reports, and catalog folders) in the Oracle BI Presentation Catalog. Presentation Catalog groups are defined by the system or by an administrator. You assign specific users to Presentation Catalog groups, and that group membership determines the users' access to Presentation Catalog object. Users in the Administrator Presentation Catalog group have full access to perform any action in a specific subject area folder.

This table lists the delivered Presentation Catalog groups, and the subject areas to which the users in those groups have full access to perform any action:

| <b>Presentation Catalog groups</b>  | <b>Permissible Subject Area Folders</b> |
|-------------------------------------|---|
| Accounts Payable Manager            | FMS - Payables                          |
| Accounts Receivable Manager         | FMS - Receivables                       |
| Business Analyst                    | SCM                                     |
| CS (Campus Solutions) Administrator | CSW                                     |
| Commodity Manager                   | SCM                                     |
| Finance Manager                     | FMS - General Ledger                    |
| HCM Executive                       | HCM                                     |
| HCM Manager                         | HCM                                     |
| Line Manager                        | HCM                                     |
| Project Manager                     | FMS - Enterprise Service Automation     |
| Presentation Server Administrators  | All                                     |

All of the Presentation Catalog groups that are listed in this table, with the exception of the Presentation Server Administrators group, have a corresponding Oracle BI Server group with the exact name.

### See Also

*Oracle Business Intelligence Presentation Services Administration Guide*, "Managing Oracle BI Presentation Services Security"

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## Drilling to the PeopleSoft Source Transaction System

Users with the appropriate permissions can log into the OBIEE application and click links to view Dashboards, Answers, More Products, Settings, and My Account. The views that you can access are determined by your membership in a Presentation Catalog group.

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, "Using Oracle BI Interactive Dashboards," Navigating in Oracle BI Interactive Dashboards.

For certain packaged OBIEE reports, you can drill in place from summary reports to more detailed reports, and from there to source transactions in the transaction processing application. This table lists the delivered reports from which you can drill into the PeopleSoft transaction processing application, and the target online transaction page:

| <b>OBIEE Report</b>  | <b>Report Column</b>  | <b>Target Online Transaction Page</b>                |
|--|---|--|
| CSW: Student Administration - Admissions and Recruiting Analysis | Applicant Status Details report - Application Number column | Admission Application page (ADM_APPL_PROG_MNT)       |
| FMS: General Ledger - Actual vs Prior-Budget-Forecast            | Journal Listing report - Journal ID column                  | Journal Entries page (JOURNAL_ENTRY)                 |
| HCM: Workforce Profile - Top Performer Turnover                  | Top Performer at Risk report - Person Name Drill column     | Job Summary page (JOB_SUMMARY)                       |
| SCM: Spend   | Spend By Supplier report - Supplier ID column               | Overdue Scheduled Payments page (VNDR_PAYINQ_OVRDUE) |

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## Request Filters

During the creation of an Oracle BI request, you can use column filters to constrain the request to obtain results that answer a particular question. Together with the columns that you include on the answer, a column filter determines what the results will contain. A column filter consists of a column to filter, a value to use when applying the filter, and an operator that determines how the value is applied. You can also prevent the filter from being replaced during navigation and prompting.

An example of an Oracle BI request that is built using a filter is the Applicant Trends report that is embedded in the CSW: Student Administration dashboard: Overview page. The request is filtered by Academic Year using a page prompt for that report. You can further narrow the results that appear on the Applicant Trends report by using the Institution, Campus, Admit Term, Academic Level, Academic Career, Academic Program and Academic Plan dashboard prompts that appear on the Overview page.

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, "Filtering Requests in Oracle BI Answers" for additional information on using column filters in an Oracle BI request.

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## Cache Management

For this release of the OBIEE, if you run an initial or incremental load without first clearing the query cache, it is possible that reports that you run after the load process will reuse the cache that existed prior to the load process. This can result in inconsistencies between reports. There are several alternatives to mitigate this situation, such as:

- Configure the query cache to expire daily.
- Clear the cache tables manually as needed; for example, after you complete a load process.
- Schedule the system to clear the cache tables at same frequency as the incremental load process.

To clear cached queries:

1. Open the Oracle BI Administration Tool in online mode.
2. Access the Cache Manager page (Manage, Cache) and select all cache entries.
3. Click Action, Refresh.

To disable the cache:

1. Locate this configuration file: <root directory>\OracleBI\server\Config\NQSConfig.INI.
2. In the Query Result Cache Section, change the [ CACHE ] setting from `ENABLE = YES;` to `ENABLE = NO;`.
3. Save the NQSConfig.INI configuration file and restart the Oracle BI Server service.

See *Oracle Business Intelligence Server Administration Guide*, "Query Caching in the OracleBI Server" chapter for more information on query caching in OBIEE.



## Chapter 3

# Setting Up Security

This chapter provides an overview of security configuration types and secured dimensions, and discusses how to:

- Set up user authentication.
- Set up object-level security.
- Set up data-level security.

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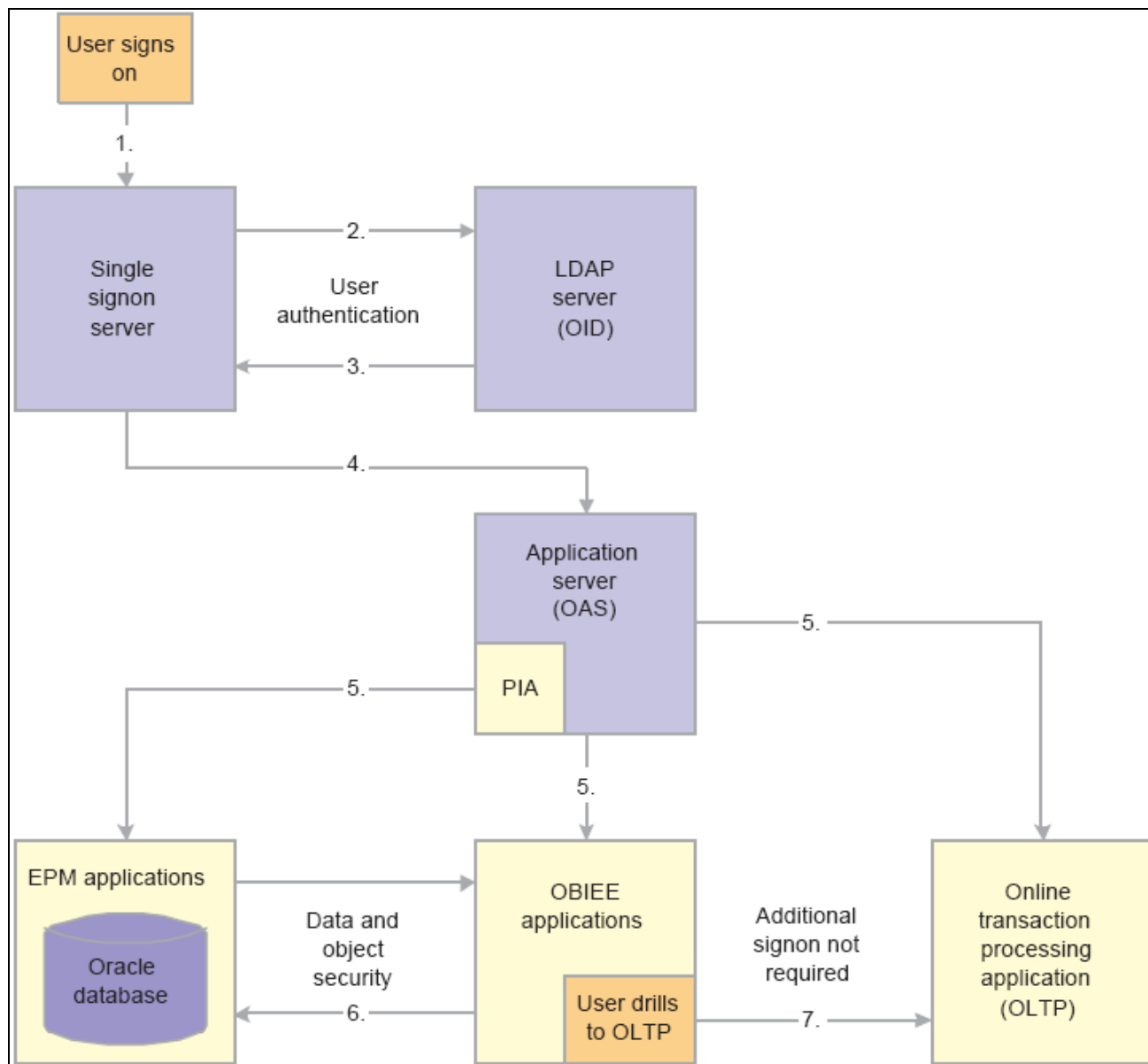
## Understanding Security Configuration Types

Security in the Fusion Campus Solutions Intelligence application can be broadly classified into three configuration types—user authentication, dashboard object security, and data access security. All three configuration types play a vital role in securing data. This table discusses the security configurations that are delivered with the Fusion Campus Solutions Intelligence application:

| <i><b>Security Configuration</b></i> | <i><b>Description</b></i>  |
|--------------------------------------|--|
| User authentication                  | When a user logs into OBIEE to view or build dashboards and answers, the system authenticates the user by using the Single Signon Server and the existing identity management scheme.  |
| Dashboard object security            | <p>The user's membership in Oracle BI Server groups controls the user's access to Oracle BI Administration Tool objects, such as subject areas, presentation tables, and presentation table columns in the repository. The user's membership in Presentation Catalog groups controls the user's access to Oracle BI Presentation Catalog objects, such as dashboards, reports, and catalog folders. When a user logs into the system, and the user's PeopleSoft security role matches an Oracle BI Server group or Presentation Catalog group, the system automatically assigns the appropriate object permissions to the user.</p> <p><b>Note.</b> When you create custom dashboards in OBIEE, you can restrict access to dashboards and dashboard pages, and other Presentation Catalog objects. Use the Oracle BI Repository to restrict access to the underlying data.</p> |

| <b>Security Configuration</b> | <b>Description</b>   |
|-------------------------------|--|
| Data access security          | <p>The user's PeopleSoft security role controls the user's access to data. Data security is synchronized between the Fusion Campus Solutions Intelligence application and PeopleSoft Enterprise Performance Management applications by creating Oracle BI Server groups that match user roles. When a user navigates to a report, the data that appears is based on permissions that are granted to the user's security role, and any additional security that is applied to the Oracle BI Server group.</p> <p>If a user's security role does not match an Oracle BI Server group, when the user signs onto the system and navigates to a report, the data that appears is based on permissions that are granted to the user's security role.</p> <p>When an Oracle BI Server group maps exactly to a Presentation Catalog group, the Presentation Catalog group inherits the permissions from the Oracle BI Server group. The system does not require that every Oracle BI Server group map exactly to a Presentation Catalog group.</p> |

This diagram shows the relationship of user authentication, dashboard object security, and data access security in the Fusion Campus Solutions Intelligence application:



Fusion Campus Solutions Intelligence security

These steps explain the flow of user authentication, dashboard object security, and data access security in the Fusion Campus Solutions Intelligence application:

1. The user signs onto the Single Signon (SSO) Server.
2. The SSO server authenticates the user by checking into the LDAP Server.
3. The LDAP server confirms that the user is valid.
4. The Application server is configured to get the user information from the SSO server.

This eliminates the need for the user to log separately into PeopleSoft Internet Architecture (PIA) and OBIEE.

5. After the user logs in, the system applies object-level security to determine the user's access to objects such as pages, reports, and components.

Object-level security is controlled by the OBIEE Presentation Catalog security group with which the user is associated.

6. When the user clicks on a report, the system applies data-level (row-level) security.

Data-level security is controlled by the user's security role and the Oracle BI Server group with which the user is associated.

7. When the user clicks a link to drill in place to an OLTP, additional signon is not required.

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## Understanding Secured Dimensions

In PeopleSoft EPM you can grant users access to a particular dimension if you indicate during system setup that the dimension requires securing. Each secured dimension is associated with a security join table (SJT) in the EPM database that stores the security profiles for users, and the corresponding dimension values to which they have access.

This table lists the delivered, secured dimensions for the Fusion Campus Solutions Intelligence application:

| <b>Subject Area</b>            | <b>Secured Dimension</b>                    |
|--------------------------------|---|
| Campus Solutions               | Academic Group<br>Institution               |
| Financial Management Solutions | Business Unit<br>Department                 |
| Human Capital Management       | Department                                  |
| Supply Chain Management        | Commodity<br>Business Unit Accounts Payable |

### See Also

*PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*, "Setting Up EPM Security," Defining Dimension and Metric Security

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## Setting Up User Authentication

Users sign directly into Oracle Business Intelligence Enterprise Edition (OBIEE) to access the Fusion Campus Solutions Intelligence application. By setting up single signon with user identity management, you eliminate the need to maintain multiple user ID repositories. The OBIEE system authenticates the user at signon and associates the user's role with security groups in OBIEE.



The single signon with user identity management feature also enables users to drill in place from the Fusion Campus Solutions Intelligence dashboards or reports to source data in online PeopleSoft transaction applications without encountering an additional PeopleSoft signon page.

This section discusses how to complete the following tasks to set up Oracle Single Signon with Oracle Internet Directory (OID) for the Fusion Campus Solutions Intelligence application:

- Configure PeopleTools for LDAP authentication.
- Configure OBIEE to use LDAP authentication.
- Register PeopleSoft as a partner application with Oracle Single Signon Server.
- Register OBIEE as a partner application with Oracle Single Signon Server.
- Configure PeopleSoft for Single Signon with Oracle Application Server.
- Configure OBIEE for Single Signon with Oracle Application Server.

---

**Note.** PeopleSoft and OBIEE also support third-party single signon authentication systems. For more details, refer to the *Enterprise PeopleTools PeopleBook: Security Administration*.

---

### See Also

*Oracle Business Intelligence Server Administration Guide*

## Configuring PeopleTools for LDAP Authentication

To configure the PeopleTools system for LDAP authentication, use the instructions in the *Enterprise PeopleTools PeopleBook: Security Administration* to complete these tasks:

1. Configure the LDAP directory.

Use the Configure Directory - Directory Setup page (PeopleTools, Security, Directory, Configure Directory, Directory Setup) to specify the network information of your LDAP directory servers.

Use the Configure Directory - Additional Connect DN's (distinguished names) page (PeopleTools, Directory, Configure Directory, Additional Connect DN's) to specify connect DN's, in addition to the default connect DN specified on the Directory Setup page.

2. Cache the directory schema.

Use the Configure Directory - Schema Management page (PeopleTools, Security, Directory, Configure Directory, Schema Management) to install selected PeopleSoft-specific schema extensions into your directory.

Use the Configure Directory - Test Connectivity page (PeopleTools, Security, Directory, Configure Directory, Test Connectivity) to test the DN's and search criteria that you entered on the previous pages of the Configure Directory component, and view the results.

3. Create authentication maps.

Use the Authentication Map - Authentication page (PeopleTools, Security, Directory, Authentication Map, Authentication) to map to the directory that the PeopleSoft system uses to authenticate users.

#### 4. Create user profile maps.

Use the User Profile Map - Mandatory User Properties page (PeopleTools, Security, Directory, User Profile Map, Mandatory User Properties) to specify the attributes that are required for signon.

---

**Note.** Skip these tasks if you configured the PeopleTools system for LDAP authentication as part of a previous installation.

---

See *Enterprise PeopleTools PeopleBook: Security Administration*, "Employing LDAP Directory Services," Configuring the LDAP Directory.

### **Verify the Configuration**

Perform the following steps to verify the correct configuration:

1. Sign onto Oracle's PeopleSoft Enterprise application as a user with administrative rights, such as *VPI*, password *VPI*, and navigate to the Configure Directory component (PSDSSETUP).  
  
Verify that an LDAP server is configured to match your OID.  
  
Access the Test Connectivity page and verify that all tests are successful.
2. Navigate to the Authentication Map - Authentication page.  
  
Verify that a map exists that matches the directory server in the previous step.
3. Navigate to the User Profile Map - Mandatory User Properties page.  
  
Verify that a user profile map exists for the directory server in the previous step.
4. Navigate to the Signon PeopleCode page (PeopleTools, Security, Security Objects, Signon PeopleCode).  
  
Verify that the Invoke as button is enabled, and the User ID and Password fields are populated with the person who has the authority to execute the signon PeopleCode.  
  
Verify that the functions *LDAP\_Authentication* and *LDAP\_ProfileSynch* are enabled.
5. Sign onto the PeopleSoft application as an enterprise user that exists in the LDAP server.
6. If the signon to the PeopleSoft application fails, reboot the associated application server.

---

**Note.** The LDAP profiles are synchronized with PeopleSoft user profiles only when users sign onto the application. Therefore, all enterprise users (users that are created in the LDAP server) must sign onto the PeopleSoft application at least once before using the Fusion Campus Solutions Intelligence application.

---

## **Configuring OBIEE to Use LDAP Authentication**

To configure OBIEE to use LDAP authentication, complete the tasks that are discussed in this section.

In the Oracle BI Administration Tool, access the Security Manager - LDAP Server page (Oracle BI Administration, Manage, Security, LDAP Servers, Action, New, LDAP Server).

LDAP Server - OID

General

Advanced

Name:

OID

Host name:

bghosh-linux.us.us.oracle.com

Port number:

13060

LDAP version

☐ 2

☒ 3

Base DN:

dc=us.dc=oracle.dc=com

Bind DN:

cn=orcladmin

Bind password:

xxxxxxxxxx

Confirm password:

xxxxxxxxxx

Description:

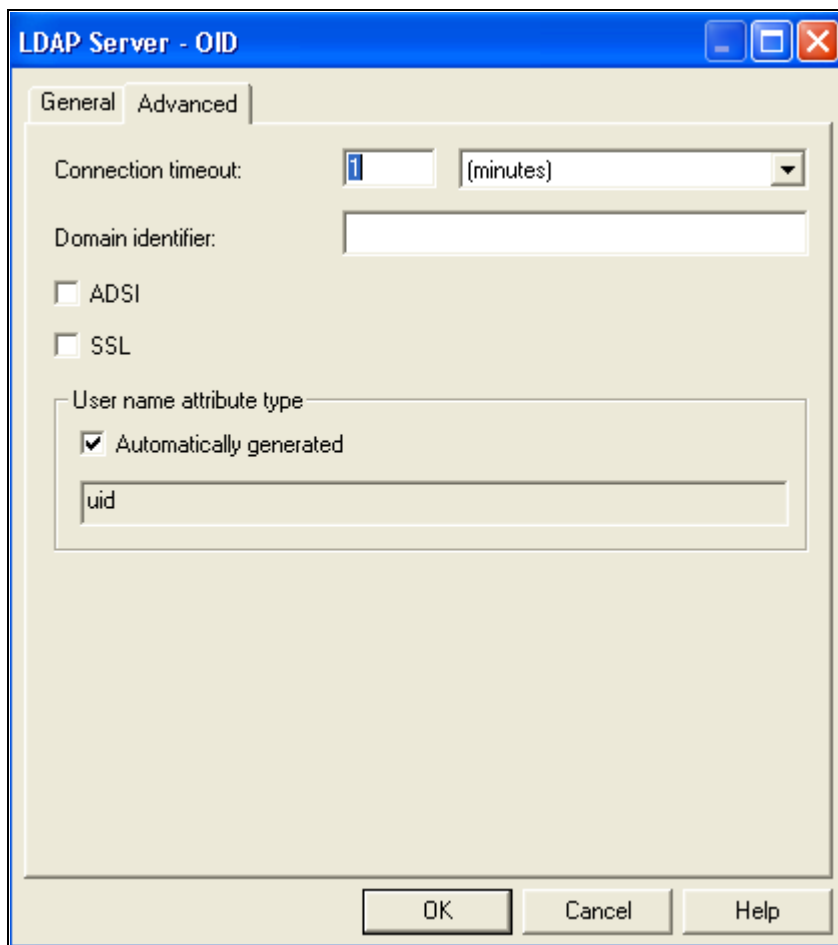
Test connection

OK

Cancel

Help

Security Manager - LDAP Server page: General tab



Security Manager - LDAP Server page: Advanced tab

Create a new LDAP server and enter the relevant information. The preceding screen shots show an example of establishing an LDAP server named *OID* (Oracle Internet Directory).

See *Oracle Business Intelligence Server Administration Guide*, "Security in OracleBI," OracleBI Security Manager, Importing Users and Groups from LDAP.

### **Configure Variables**

Access the Session Variable Initialization Block page and Session Variable Initialization Block Variable Target page (Oracle BI Administration, Manage, Variables, Session, Initialization Blocks, Session Variable Initialization Block).

Session Variable Initialization Block - OID Demo

Name:OID Demo

☐ Disabled

Data Source

Edit Data Source...

| Name | Domain identifier |
|------|-------------------|
| OID  |                   |

Variable Target

| Name | Default Initializer |
|------|---------------------|
| USER |                     |

Edit Data Target...

Execution Precedence

No execution precedence setting was made

Edit Execution Precedence...

☐ Required for authentication

Description

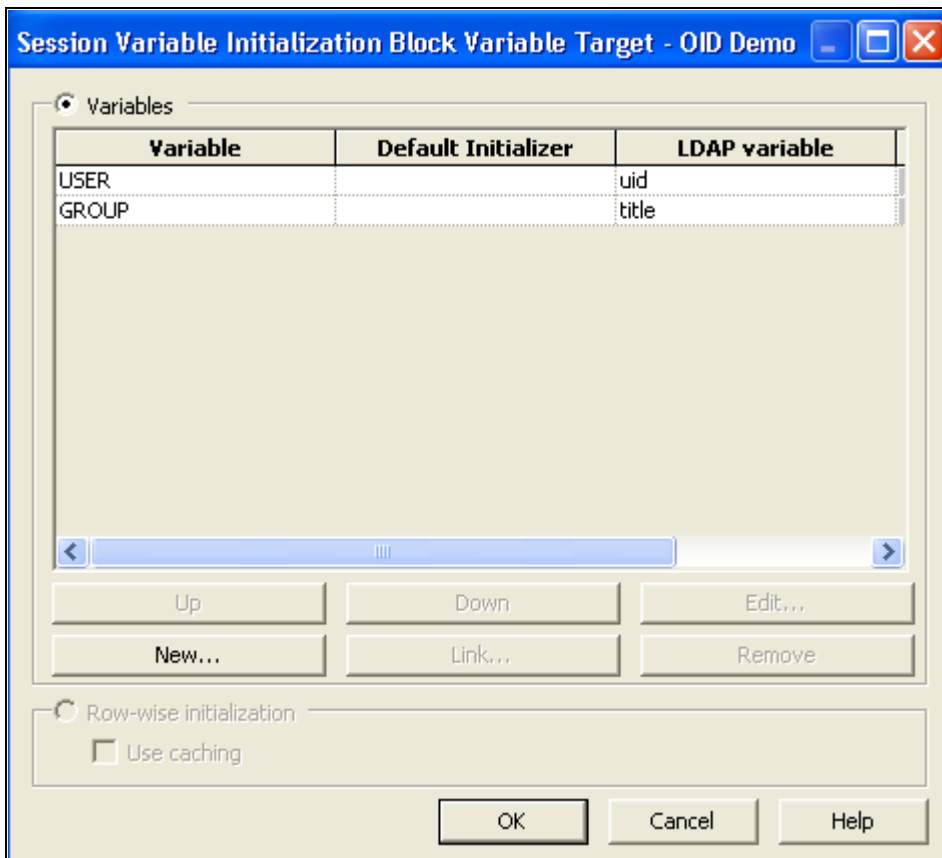
Test...

OK

Cancel

Help

Session Variable Initialization Block page



The dialog box titled "Session Variable Initialization Block Variable Target - OID Demo" contains a "Variables" section with a table. The table has three columns: "Variable", "Default Initializer", and "LDAP variable". It lists two variables: "USER" mapped to "uid" and "GROUP" mapped to "title". Below the table are buttons for "Up", "Down", "Edit...", "New...", "Link...", and "Remove". At the bottom, there are checkboxes for "Row-wise initialization" and "Use caching", and "OK", "Cancel", and "Help" buttons.

| Variable | Default Initializer | LDAP variable |
|----------|---------------------|---------------|
| USER     |                     | uid           |
| GROUP    |                     | title         |

Session Variable Initialization Block Variable Target page

The preceding screen shots show an example of configuring session variables for an initialization block named *OID Demo*. The data source for this initialization block is the *OID* LDAP server as shown on the LDAP Server page example in the previous section.

To configure variables:

1. Create a new session initialization block and select the LDAP server as the data source.
2. Create a session variable named *USER* and map it to the LDAP variable named *uid*.
3. Create a session variable named *GROUP* and map it to the LDAP variable that reflects the role of the user, such as *role* or *title*.

See *Oracle Business Intelligence Server Administration Guide*, "Using Variables in the OracleBI Repository," Process of Creating Initialization Blocks.

## Registering PeopleSoft as a Partner Application With Oracle Single Signon Server

To register PeopleSoft as a partner application with Oracle Single Signon Server, complete the tasks that are discussed in this section.

Sign onto the Single Signon Server and access the Edit Partner Application page (Single Signon Server, Access Partner Applications, SSO Server Administration, Administer Partner Applications).

**Edit Partner Application - OBIEE**

**Partner Application Login**

Enter the application name, the home URL and the success URL for this application. The home URL is the application's home page. The success URL refers to the URL to be redirected to upon successful login. It must correspond to the procedure that processes the user identification information from the SSO Server. For administrative purposes, the application id, the application token, and the encryption key used by the SSO Server to identify this application are also displayed here. The application token must be used by the partner application when requesting authentication.

ID: D3FE41EF  
 Token: E50498VID3FE41EF  
 Encryption Key: CB41572F372F38AD  
 Login URL: http://reas025.dsi-inet.peoplesoft.com:7777/pls/orasso/orasso.wwsso\_app\_admin.ls\_login  
 Single Sign-Off URL: http://reas025.dsi-inet.peoplesoft.com:7777/pls/orasso/orasso.wwsso\_app\_admin.ls\_logout  
 Name: OBIEE  
 Home URL: http://dhcp-psft-e-2nd-west-10-  
 Success URL: http://dhcp-psft-e-2nd-west-10-  
 Logout URL: http://dhcp-psft-e-2nd-west-10-

Edit Partner Application page

Create a new partner application and enter the appropriate values. The preceding screen shot shows an example of setting up PeopleSoft as a partner application with the Oracle Single Signon Server.

See *Oracle Application Server Single Sign-On Administrator's Guide*.

## Registering OBIEE as a Partner Application With Oracle Single Signon Server

The steps to register OBIEE as a partner application with Oracle Single Signon Server are identical to the steps that you completed when you registered PeopleSoft as a partner application with Oracle Single Signon Server.

## Configuring PeopleSoft for Single Signon With Oracle Application Server

To configure PeopleSoft for single signon with the Oracle Application Server, complete the tasks that are discussed in this section. Refer to the *Enterprise PeopleTools PeopleBook: Security Administration* for a discussion and example of this configuration.

See *Enterprise PeopleTools PeopleBook: Security Administration*, "Implementing Single Signon," Implementing Single Signon Between PeopleSoft and Oracle Applications, Implementing Oracle as a Partner Application, Setting up Oracle as a Partner Application.

1. Configure the Oracle Application Server to use the Oracle Single Signon Server.

Access the Oracle Enterprise Manager's Infrastructure tab, and click the Change button in the Identity Management section to verify the appropriate Oracle Single Signon Server. If a different Single Signon Server is to be used, reinstall Oracle Application Server and indicate the correct Single Signon Server during setup.

---

**Note.** Complete this step one time for each Oracle Application Server installation. You do not need to perform this step for each PeopleSoft installation on the Oracle Application Server.

---

2. Create a default user ID, which is similar to implementing the web server security exit in PeopleSoft.

See *Enterprise PeopleTools PeopleBook: Security Administration*, "Employing Signon PeopleCode and User Exits," Using the Web Server Security Exit, Creating a Default User.

3. Modify the PeopleSoft web profile to contain default user signon information.

Enable the Allow Public Access option for the web profile.

Enter the same user ID that you created in the previous step.

To prevent a user ID from appearing as the default user on the signon page, enter a 0 value for the Days to Auto Fill User ID field.

See *Enterprise PeopleTools PeopleBook: Security Administration*, "Employing Signon PeopleCode and User Exits," Using the Web Server Security Exit, Modifying the Web Profile.

See *Enterprise PeopleTools PeopleBook: Internet Technology*, "Configuring the Portal Environment," Configuring Web Profiles, Configuring Portal Security.

4. Implement signon PeopleCode.

Make sure that the Oracle Internet Directory user information exists in PeopleSoft, which can be accomplished with a delivered Signon PeopleCode function.

This step requires that user profiles are defined in the Oracle Internet Directory and in PeopleSoft. PeopleSoft provides the OSSO\_AUTHENTICATION Signon PeopleCode function to obtain user profile and role information from the Oracle Internet Directory. To use this information, add and enable OSSO\_AUTHENTICATION in the FUNCLIB\_LDAP record definition by using the Signon PeopleCode page.

We recommend that you modify the entry for SSO\_AUTHENTICATION and change the function name to OSSO\_AUTHENTICATION. This action avoids mixing single signon options. In your Signon PeopleCode program, modify the getWWWAuthConfig( ) function to assign the value of the default user that you created to the &defaultuserId variable.

---

**Note.** OSSO\_AUTHENTICATION must appear before LDAP\_PROFILESYNC in the Signon PeopleCode page grid.

---

See *Enterprise PeopleTools PeopleBook: Security Administration*, "Employing Signon PeopleCode and User Exits," Using Signon PeopleCode, Enabling Signon PeopleCode.

---

**Note.** Alternatively, you can write a custom PeopleCode program to create the user as needed. However, this customization is not supported by Oracle.

---



5. Modify `mod_osso.conf` file, located in `<ORACLE_HOME>/apache/apache/conf/`, to redirect users to the Oracle Single Signon page.

This is an example of code in the `mod_osso.conf` file:

```
<Location /PORTAL> require valid-user
AuthType Basic
</Location>
```

6. Restart the Oracle Application Server and Oracle Internet Directory.

## Configuring OBIEE for Single Signon With Oracle Application Server

To configure OBIEE for single signon with the Oracle Application Server, complete the tasks that are discussed in this section.

1. Select or create an OBIEE user for impersonation.

See *Oracle Business Intelligence Server Administration Guide*, "Security in Oracle BI," Authentication Options.

- In the OBIEE repository, create a special user for this purpose, and assign this user a password. For example, create a user such as *Impersonator*, and assign a password such as *secret*.
- Add this user to the *Administrators* Presentation Catalog group.

2. Add the username and password that you created in the previous step to the Presentation Servers' credential stores.

See *Oracle Business Intelligence Presentation Services Administration Guide*, "Customizing the Oracle BI Presentation Services User Interface," Configuring the Oracle Business Intelligence ReportUI Portlet.

For example, open a command shell and navigate to the directory `<OracleBI>/web/bin`, where `<OracleBI>` represents the root directory of the Presentation Server. Execute the *cryptotools* utility to add or edit the impersonator's credentials in the Presentation Server's credential store and supply values for all prompted parameters.

You must specify the credential alias impersonation, such as the one shown in this example:

```
cryptotools credstore -add -infile <OracleBI>/web/config/credentialstore.xml
>Credential Alias: impersonation
>Username: Impersonator
>Password: secret
>Do you want to encrypt the password? y/n (y):
>Passphrase for encryption: another_secret
>Do you want to write the passphrase to the xml? y/n (n):
>File "<OracleBI>/web/config/credentialstore.xml" exists. Do you want to
overwrite it? y/n (y):
```

In this example, the `<OracleBI>/web/config/credentialstore.xml` file contains an entry that looks like this:

```
<sawcs:credential type="usernamePassword" alias="impersonation">
  <sawcs:username>Impersonator</sawcs:username>
  <sawcs:password>
    <xenc:EncryptedData>
      <xenc:EncryptionMethod
Algorithm="http://www.rsasecurity.com/rsalabs/pkcs/schemas/pkcs-5#pbes2">
        <pkcs-5:PBES2-params
Algorithm="http://www.rsasecurity.com/rsalabs/pkcs/schemas/pkcs-5#pbkdf2">
          <pkcs-5:KeyDerivationFunc>
            <pkcs-5:Parameters>
              <pkcs-5:IterationCount>1024</pkcs-5:IterationCount>
            </pkcs-5:Parameters>
          </pkcs-5:KeyDerivationFunc>
          <pkcs-5:EncryptionScheme
Algorithm="http://www.w3.org/2001/04/xmlenc#tripledes-cbc"/>
            </pkcs-5:PBES2-params>
          </xenc:EncryptionMethod>
          <xenc:CipherData>
            <xenc:CipherValue>jeThdk8ZklnTlyKIat8Dkw</xenc:CipherValue>
          </xenc:CipherData>
        </xenc:EncryptedData>
      </sawcs:password>
    </sawcs:credential>
```

Open the Presentation Server's configuration file, such as `<OracleBI>/web/config/instanceconfig.xml` in this example, and locate the `<CredentialStore/>` node in this file. If no such node exists, create a new one. The purpose of the node is to specify the passphrase used to encrypt the password in this file. You must protect both the `credentialstore.xml` file and `instanceconfig.xml` file by using the operating system's file system protection, because the combination of these two files can reveal a privileged user's password. Neither file alone provides enough information to expose the password.

This is an example of how to specify the decryption passphrase in the `instanceconfig.xml` file:

```
<?xml version="1.0"?>
<WebConfig>
  <ServerInstance>
    <!-- other settings ... -->
    <CredentialStore>
      <CredentialStorage type="file"
path="<OracleBIData>/web/config/credentialstore.xml"
passphrase="another_secret"/>
      <!-- other settings ... -->
    </CredentialStore>
    <!-- other settings ... -->
  </ServerInstance>
</WebConfig>
```

### 3. Configure OBIEE for single signon.

- Ensure that the Presentation Server is not running on the machine where you want to set up single signon.
- Create several configuration settings.

These configuration settings tell the Presentation Server how to build up the connection string when it connects to the Oracle BI Server. In this example, the *IMPERSONATE* parameter (the user for which we are trying to establish a session) is required in the connection string. Additionally, include parameters that are supplied by the single signon system that may be passed through, such as locale, default dashboard, and other personalization parameters.

- For each parameter that is passed through in the connection string, you must indicate to the Presentation Server the source of the information to query. Possible sources are HTTP header, HTTP cookie, and server variable.

See *Oracle Business Intelligence Server Administration Guide*, "Using Variables in the Oracle BI Repository."

- When the authentication source is a Microsoft Windows domain, you can specify a special attribute to strip out the domain portion from the username, if necessary.
- When accepting trusted information from the HTTP server or servlet container, you must secure the machines that are permitted to directly communicate with the Presentation Server.

You can secure the machines with the *Listener/Firewall* node in *instanceconfig.xml*. Additionally, you can strongly secure the listener by using mutually authenticated SSL. If you use the *Listener/Firewall* node, the IP addresses of all scheduler instances and HTTP plugins (ISAPI and Servlet) must be added to the *instanceconfig.xml* file. If the scheduler or HTTP plugin is located on the same machine as the Presentation Server, you must also add 127.0.0.1 to the list of IP addresses.

---

**Note.** This setting does not control end-user browser IP addresses. If you use mutually-authenticated SSL, specify the DNS of all trusted hosts in the *Listener/TrustedPeers* node.

---

See *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

- These are examples of configuration files. Your actual configuration file will vary from this example:

```
<?xml version="1.0"?>
<WebConfig>
  <ServerInstance>
    <!-- other settings ... -->
    <Listener>
      <Firewall>
        <Allow address="127.0.0.1"/>
        <Allow address="192.168.1.100"/>
        <Allow address="192.168.1.101"/>
      </Firewall>
      <!-- other settings ... -->
    </Listener>
    <!-- other settings ... -->
    <CredentialStore>
      <CredentialStorage type="file"
path="<OracleBIData>/web/config/credentialstore.xml"
passphrase="another_secret"/>
      <!-- other settings ... -->
    </CredentialStore>
```

```

<!-- other settings ... -->
<Auth>
  <SSO enabled="true">
    <ParamList>
      <!--IMPERSONATE param is used to get the authenticated
user's username and is required -->
      <Param name="IMPERSONATE"
        source="serverVariable"
        nameInSource="REMOTE_USER" />
    </ParamList>

  </SSO>
</Auth>
<!-- other settings ... -->
</ServerInstance>
</WebConfig>

```

This example results in a connection string that takes on the following form:

```
UID=Impersonator;PWD=secret;IMPERSONATE=rgrayson;
```

See *Oracle Business Intelligence Presentation Services Administration Guide*.

---

## Setting Up Object-Level Security

You achieve object-level security by creating roles, and granting each role access to specific Oracle BI Administration Tool objects and Oracle BI Presentation Catalog objects.

This section discusses how to complete the following tasks to set up object-level security for the Fusion Campus Solutions Intelligence application:

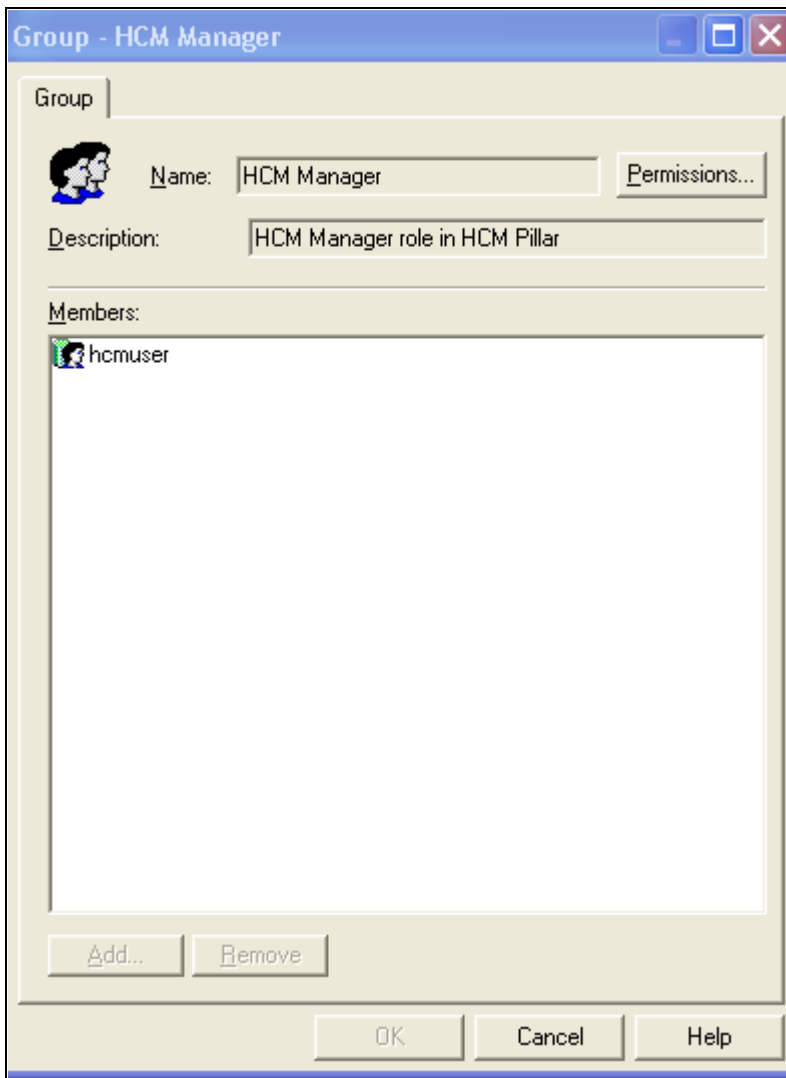
- Set up Oracle BI Server groups.
- Specify Presentation folder permissions.
- Set up Presentation Catalog groups.
- Grant role access to Presentation objects.

See *Oracle Business Intelligence Server Administration Guide*, "Security in Oracle BI," Oracle BI Security Manager, Working with Groups.

See *Oracle Business Intelligence Presentation Services Administration Guide*, "Managing Oracle BI Presentation Services Security," Administering Presentation Services Groups.

## Setting Up Oracle BI Server Groups

In the Oracle BI Administration Tool, access the Security Manager - Group page (Oracle BI Administration Tool, Manage, Security, Groups, Action, New, Group).



Security Manager - Group page

Create as many groups as necessary in the Oracle BI repository to represent unique sets of security attributes.

## Specifying Presentation Folder Permissions

Access the Presentation Catalog - Permissions page. (Open Presentation Catalog properties and click Permissions on the General tab.)

On the Presentation Catalog - Permissions page for the folder, enable the Show all users/groups option.

## Setting up Presentation Catalog Groups

Presentation Catalog groups can be thought of as user roles, because the groups avoid ambiguity about which defaults and preferences to assign directly to users. Users can be associated with multiple roles by being members of multiple Presentation Catalog groups.

To secure Presentation Catalog objects for a specific Oracle BI Server group, the Presentation Catalog group name must match the Oracle BI Server group name. To maintain data security, a user's Presentation Catalog group name must match the user's security role in PeopleSoft.

If the Oracle BI Server group name matches the a Presentation Catalog group name, members of the Oracle BI Server group automatically become members of the Presentation Catalog group when they log into the Fusion Campus Solutions Intelligence application.

Access the Presentation Catalog Security: Groups and Users page (Oracle BI Presentation Services, Settings, Administration, Manage Presentation Catalog Groups and Users).

### Presentation Catalog Security: Groups and Users page

Create Presentation Catalog groups that you will use to secure Presentation Catalog objects, such as dashboards, pages, and answers.

These groups are delivered in the Fusion Campus Solutions Intelligence application:

- Administrators
- Accounts Payable Manager
- Accounts Receivable Manager
- Business Analyst
- Commodity Manager
- Costing Manager
- CS (Campus Solutions) Administrator
- Finance Manager
- HCM (Human Capital Management) Executive
- HCM Manager
- Line Manager
- Project Manager
- Property Manager

## Granting Role Access to Presentation Objects

Access the Change Item Permissions page by clicking the Permissions icon or Page Security icon when the object is in edit mode.

**Change Item Permissions**

This screen allows you to change the permissions to this **Item**. It is recommended that you assign permissions by group rather than user when possible.

Shared Folders : **CSW Reports**

☐ Show effective permissions.

**Users and groups with explicit access to this Item**

|                                    |              |  |
|------------------------------------|--------------|--|
| CS Administrator                   | Full Control |  |
| Presentation Server Administrators | Full Control |  |

[Replace permissions with parent folder's permissions.](#)

☒ Apply permissions to sub-folders.

☒ Apply permissions to items within folder.

[Show users and groups](#)

| Additional groups           | Add Explicit Permissions |
|-----------------------------|--------------------------|
| Accounts Payable Manager    | <a href="#">Add</a>      |
| Accounts Receivable Manager | <a href="#">Add</a>      |
| Business Analyst            | <a href="#">Add</a>      |
| Commodity Manager           | <a href="#">Add</a>      |
| Costing Manager             | <a href="#">Add</a>      |
| Finance Manager             | <a href="#">Add</a>      |
| HCM Executive               | <a href="#">Add</a>      |
| HCM Manager                 | <a href="#">Add</a>      |
| Line Manager                | <a href="#">Add</a>      |
| Project Manager             | <a href="#">Add</a>      |
| Property Manager            | <a href="#">Add</a>      |
| Everyone                    | <a href="#">Add</a>      |

1-14 / 14 First < Prev | Next > | Last

Change Item Permissions page

Use the Change Item Permissions page to assign permissions to a specific object, such as a report, dashboard, or catalog.

To view and administer privileges associated with various components of OBIEE, such as general access to dashboards, answers, subject areas, security features, and so on, access the Change Privilege Permissions page (Oracle BI Presentation Services, Settings, Administration, Manage Privileges).

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, "Managing Content in the Oracle BI Presentation Catalog."

## Setting Up Data-Level Security

This section provides an overview of data-level security, and discusses how to complete the following tasks to set up data-level security for the Fusion Campus Solutions Intelligence application:

- Determine secured dimensions.
- Create physical joins.
- Secure dimensions.



- Secure facts that use specific dimensions.
- Remove data security on facts and dimensions.

See *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*, "Setting Up EPM Infrastructure, Business Rules, and Security."

## Understanding Data-Level Security

The data-level security that you set up during the PeopleSoft Enterprise Performance Management (EPM) system implementation is maintained when users access the same data in the Fusion Campus Solutions Intelligence application. Data-level security effectively leverages the PeopleSoft EPM security framework. You can set up additional data-level security in the Oracle BI Repository by using Oracle BI Server group filters and restrictive conditions in the Logical layer. These SJTs are delivered with the Fusion Campus Solutions Intelligence application and are used to store the secured members of a specific dimension:

- *D\_ACAD\_GRP\_SJT* (Academic Group SJT)
- *D\_DEPT\_SJT* (Department SJT)
- *D\_INSTN\_SJT* (Institution SJT)

The system uses *D\_BUS\_UNIT\_SJT* to secure both the Business Unit and Business Unit Accounts Payable secured dimensions.

The system uses the *PF\_SY\_ROLE\_USER* table to extract information about role user mapping.

All security-related tables are located in the Security Tables folder in the Oracle BI Repository.

## Determining Secured Dimensions

Determine the dimension that you want to secure and identify the underlying table and its corresponding SJT. For example, if you want to secure the Institution dimension, the underlying table is *D\_INSTITUTION*, and the corresponding SJT is *D\_INSTN\_SJT*.

See *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*, "Setting Up EPM Infrastructure, Business Rules, and Security."

## Creating Physical Joins

The Fusion Campus Solutions Intelligence application delivers the physical joins for the delivered secured dimensions.

Access the Physical Diagram - Physical Join page (Oracle BI Administration Tool, Manage, Joins, <dimension>) to create physical joins.

This is an example of the Physical Join page showing a join between a dimension table and its SJT:

Physical Join - D\_INSTITUTION\_D\_INSTN\_SJT

Name: D\_INSTITUTION\_D\_INSTN\_SJT

Table: D\_INSTN\_SJT

Column:

| Name            |
|-----------------|
| PF_SY_ROLE_NAME |
| INSTITUTION_SID |
| LASTUPDDTTM     |

Operator:

Table: D\_INSTITUTION

Column:

| Name            |
|-----------------|
| INSTITUTION_SID |
| INSTITUTION_CD  |
| EFFDT           |
| EFF_STAT_CD     |

Driving: None

Type: Inner

Cardinality:

☒ N ☐ 0,1 ☐ 1

Hint:

Expression:

D\_INSTITUTION.INSTITUTION\_SID = D\_INSTN\_SJT.INSTITUTION\_SID OR  
D\_INSTN\_SJT.INSTITUTION\_SID = 2147483647

OK Cancel Help

Physical Diagram - Physical Join page (example 1 of 2)

The WHERE clause that is shown in this example is `D_INSTITUTION.INSTITUTION_SID = D_INSTN_SJT.INSTITUTION_SID OR D_INSTN_SJT.INSTITUTION_SID = 2147483647`. The number 2147483647 can be used for any dimension, and indicates *ALL* access for a role.

Following is an example of a physical join between the same SJT (D\_INSTN\_SJT) and the PF\_SY\_ROLE\_USER table. Because SJT tables are populated with role information, this join will map the role to the enterprise user:

**Physical Join - D\_INSTN\_SJT\_PF\_SY\_ROLE\_USER**

Name:

---

Table:

Column:

| Name            | Type    |
|-----------------|---------|
| PF_SY_ROLE_NAME | VARCHAR |
| OPRID           | VARCHAR |

Table:

Column:

| Name            | Type     |
|-----------------|----------|
| PF_SY_ROLE_NAME | VARCHAR  |
| INSTITUTION_SID | DOUBLE   |
| LASTUPDDTTM     | DATETIME |

Operator:

Driving:  Type:

Cardinality: ☐ N ☐ 0,1 ☒ 1 ☐ 1 ☐ 0,1 ☐ N

Hint:

Expression:

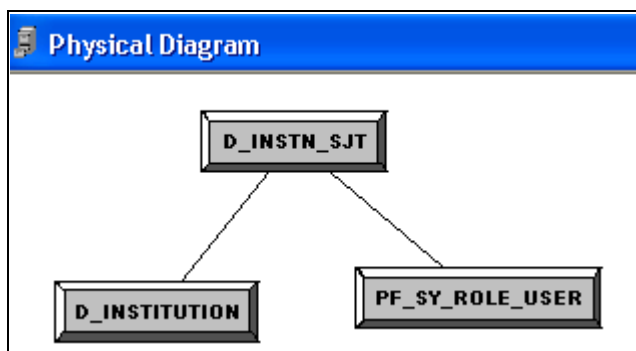
```
D_INSTN_SJT.PF_SY_ROLE_NAME = PF_SY_ROLE_USER.PF_SY_ROLE_NAME AND
PF_SY_ROLE_USER.OPRID IN ( VALUEOF(NQ_SESSION."USER") )
```

OK Cancel Help

Physical Diagram - Physical Join page (example 2 of 2)

The Where clause that is used in this example is `D_INSTN_SJT.PF_SY_ROLE_NAME = PF_SY_ROLE_USER.PF_SY_ROLE_NAME AND PF_SY_ROLE_USER.OPRID IN ( VALUEOF(NQ_SESSION."USER") )`. The variable `NQ_SESSION.USER` is an OBIEE variable that stores the user ID of the person who is currently signed onto the system.

This is the resulting physical diagram from the preceding two physical join examples:



Physical Diagram page

## Securing Dimensions

Access the Business Model and Mapping - Logical Table Source page (Oracle BI Administration Tool, Business Model and Mapping layer, <dimension>, Properties, Sources) to secure dimensions.

This is an example of the Logical Table Source page for the Institution dimension:

Logical Table Source - D\_INSTITUTION

General | Column Mapping | Content

Name: D\_INSTITUTION

☒ Active

Map to these tables:

- "Enterprise Warehouse".."Enterprise Warehouse"."D\_INSTITUTION"
- "Enterprise Warehouse".."Enterprise Warehouse"."D\_INSTN\_SJT"
- "Enterprise Warehouse".."Enterprise Warehouse"."PF\_SY\_ROLE\_USER"

Add... Remove

Joins:

|                                     | Table         | Table           | Type  |
|-------------------------------------|---------------|-----------------|-------|
| <input checked="" type="checkbox"/> | D_INSTITUTION | D_INSTN_SJT     | Inner |
| <input checked="" type="checkbox"/> | D_INSTN_SJT   | PF_SY_ROLE_USER | Inner |

View Details...

Description:

OK Cancel Help

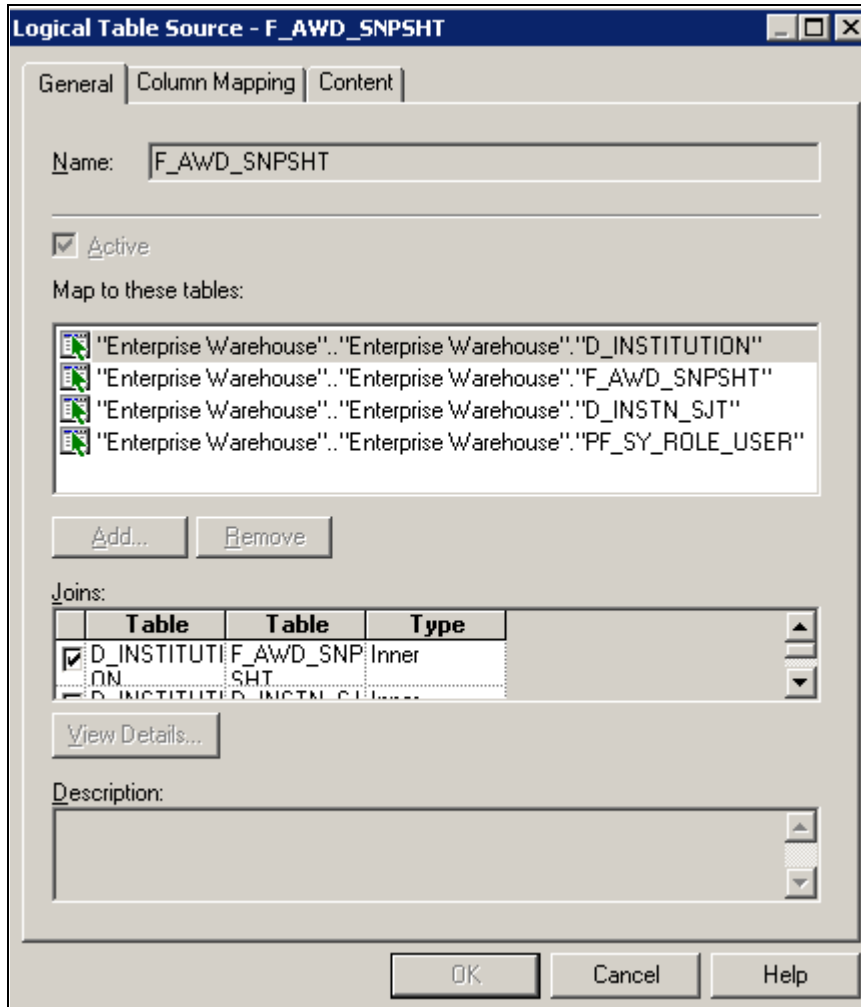
Business Model and Mapping - Logical Table Source page (example 1 of 3)

In this example, to secure the Institution dimension, the tables that are involved are D\_INSTITUTION and D\_INSTN\_SJT. In the Business Model and Mapping layer, open the D\_INSTITUTION dimension properties, and click the Sources tab. Force a join with the D\_INSTN\_SJT and PF\_SY\_ROLE\_USER by first adding the two tables to the Map to these tables region, and selecting the associated rows in the Joins grid.

## Securing Facts That Use Specific Dimensions

Access the Business Model and Mapping layer - Logical Table Source page to secure facts.

This is an example of the Logical Table Source page for the Award Snapshot fact:



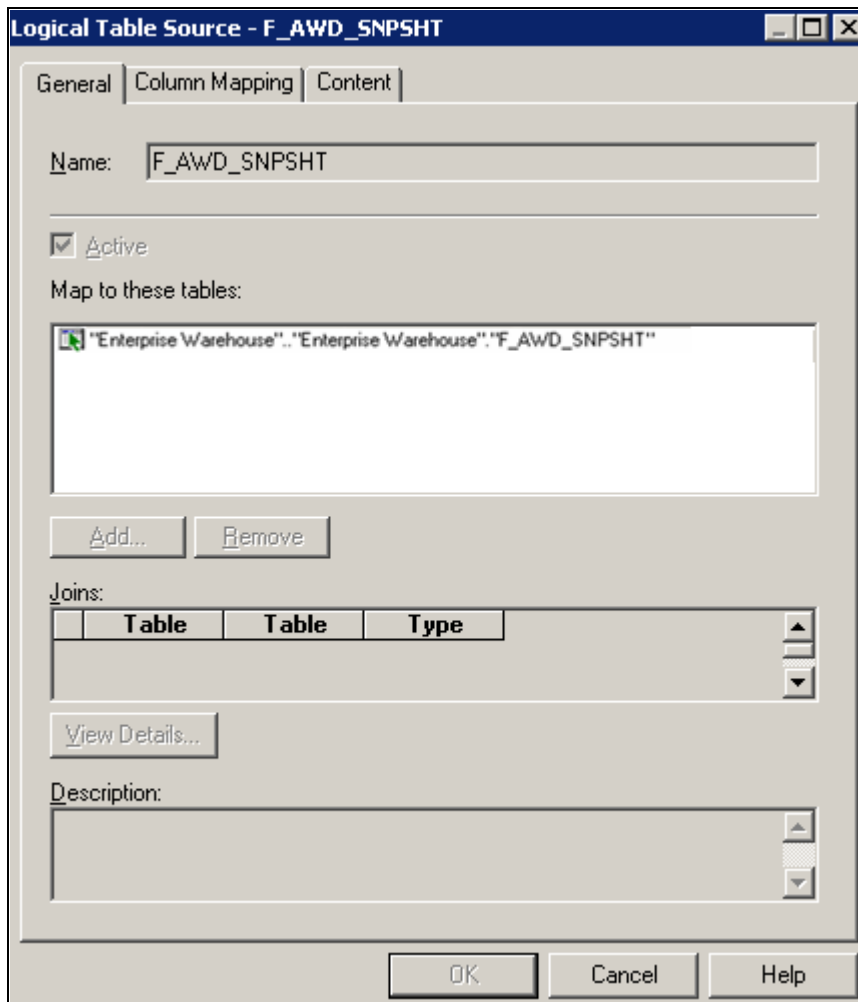
Business Model and Mapping layer - Logical Table Source page (example 2 of 3)

In this example, secure facts that use the Institution dimension in the same way that you secured the Institution dimension. In the Business Model and Mapping layer, open the F\_AWD\_SNPSHT fact properties, and click the Sources tab. Force a join with the D\_INSTITUTION, D\_INSTN\_SJT, and PF\_SY\_ROLE\_USER tables by first adding the three tables to the Map to these tables region, and selecting the associated rows in the Joins grid.

## Removing Data Security on Facts and Dimensions

Access the Business Model and Mapping layer - Logical Table Source page to remove data security on facts and dimensions.

This is an example of the Logical Table Source page for the Award Snapshot fact after you remove the table mapping that you added in the previous example:



Business Model and Mapping layer - Logical Table Source page (example 3 of 3)

To remove the data security on facts or dimensions, select the dimension or fact, access the Sources, and right-click on Properties. Clear the joins and remove the associated tables.

For example, assume that you want to remove the fact security that you set up in the previous section. To disable the security, delete the forced joins with D\_INSTITUTION, D\_INSTN\_SJT and PF\_SY\_ROLE\_USER tables. When you remove the tables from the Map to these tables region, the system removes the joins from the Joins grid, and the data will be unsecured.

## Chapter 4

# Setting Up Drilling to Online Transaction Systems

This section discusses how to complete the following setup tasks that are required to drill in place to PeopleSoft online transaction systems from the Fusion Campus Solutions Intelligence application:

- Storing URLs for system source IDs and versions.
- Creating initialization blocks and dynamic repository variables.
- Creating logical columns.
- Creating answers with drill in place capability.

---

**Note.** The Drill to Transaction Systems feature is only available if you use a PeopleSoft 8.8 transaction application or higher.

---

---

## Storing URLs for System Source IDs and Versions

PeopleSoft EPM contains two tables—PS\_SRC\_CONFIG and PS\_SRC\_COMPONENT—that the Fusion Campus Solutions Intelligence application use to store the information that is needed to drill into PeopleSoft online transaction applications from Fusion Campus Solution Intelligence application.

- The PS\_SRC\_CONFIG table stores the URL for the PeopleSoft homepage for a particular source system ID and version.

This is a deployment activity and will vary based on your particular PeopleSoft Internet Architecture (PIA) installation. The URL will be different for each implementation.

Do not add a forward slash to the end of the URL. Add a row if the row does not exist for a particular source, or just update the row.

This is an example of an SQL statement that sets up the functionality to drill into a PeopleSoft Campus Solutions instance:

```
UPDATE PS_SRC_CONFIG
SET URL_1 = 'HTTP://ADNTAS42.PEOPLESOFT.COM:6300/PSP/EM_HC890TS1_TS091824'
WHERE SRC_SYS_ID='HCM'
```

- The PS\_SRC\_COMPONENT table stores the component paths for a particular version of the source system ID.

The component paths may vary for different versions of the same PeopleSoft online transaction application.

Create a URL for the path to the PIA online transaction application component in this table. Add a forward slash to the beginning of the string. Make sure that all the key fields are on the string, and that their parameter value is :1, :2, and so on, based on the number of keys in the component.

This is an example of an SQL statement that sets up the functionality to drill into the Admission Application page in the Campus Solutions instance. In this example, the component path has three parameters:

```
INSERT INTO PS_SRC_COMPONENT
VALUES ( 'HCM' , 'ADM_APPL_PROG_MNT' , 'CS ADMISSION APPLICATION
PIA PAGE' , ' /EMPLOYEE/HRMS/C/PROCESS_APPLICATIONS.ADM_APPL_
MAINTNCE.GBL?PAGE=ADM_APPL_PROG_MNT&EMPLID=&APPL_PROG_NBR=&
ACAD_CAREER=&ADM_APPL_NBR=:1&INSTITUTION=:2&ADMIT_TERM=:3 ' ) ;
```

Repeat this step to set up drill in place functionality for as many pages as necessary.

---

## Creating Initialization Blocks and Dynamic Repository Variables

Access the Repository Variable Init (Initialization) Block page, Repository Variable Init Block Data Source page, and Repository Variable Init Block Variable Target page (Oracle BI Administration, Manage, Variables, Repository, Initialization Blocks) to create initialization blocks and dynamic repository variables.

These are examples of the Repository Variable Initialization Block pages for the Admission Application page that is referenced in the previous example:



Repository Variable Init Block - Admission Application PIA page

Name: Admission Application PIA page

☐ Disabled

Schedule

Start on: Wednesday, January 01, 2003 12:00:00 AM

Refresh interval: 1 (hours)

Data Source

Connection Pool "Enterprise Warehouse", "MDW InitBlock Cor" Edit Data Source...

Data base: SQL Anywhere 8 (Initialization string inherited from Default)

SELECT A.URI\_TEXT\_PSP  
FROM PS\_OBI\_DRILL\_PG\_VW A

Variable Target

Name Default Initializer

< ||| >

Edit Data Target...

Execution Precedence

No execution precedence setting was made

Edit Execution Precedence...

Description

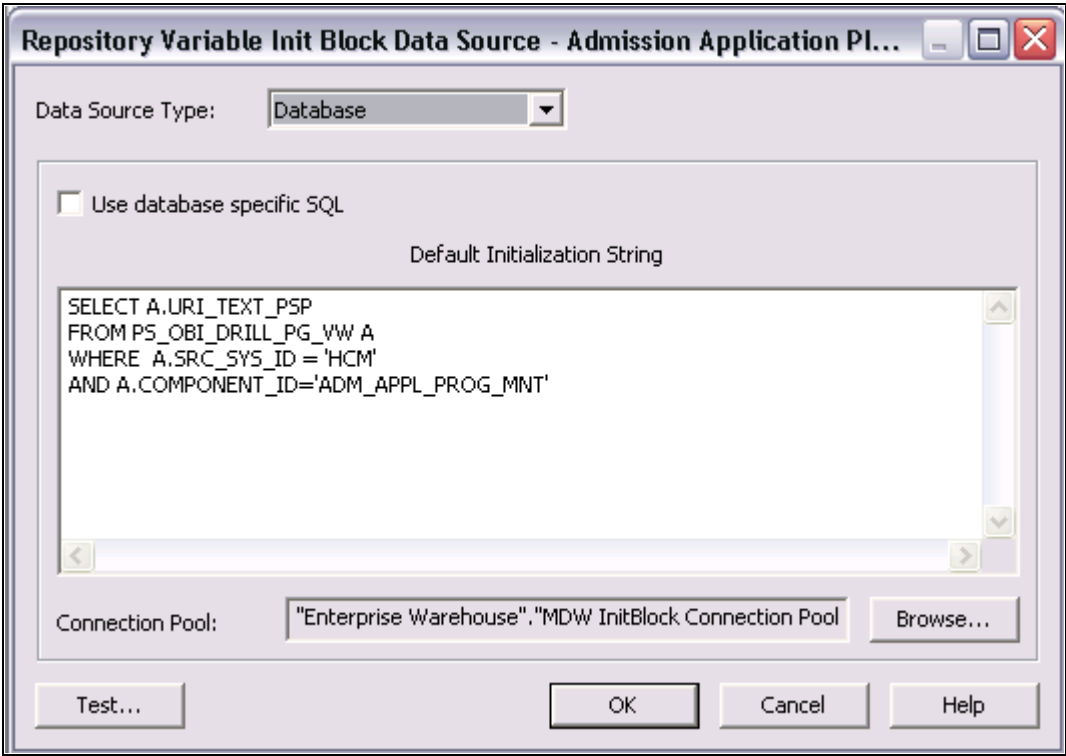
Test...

OK

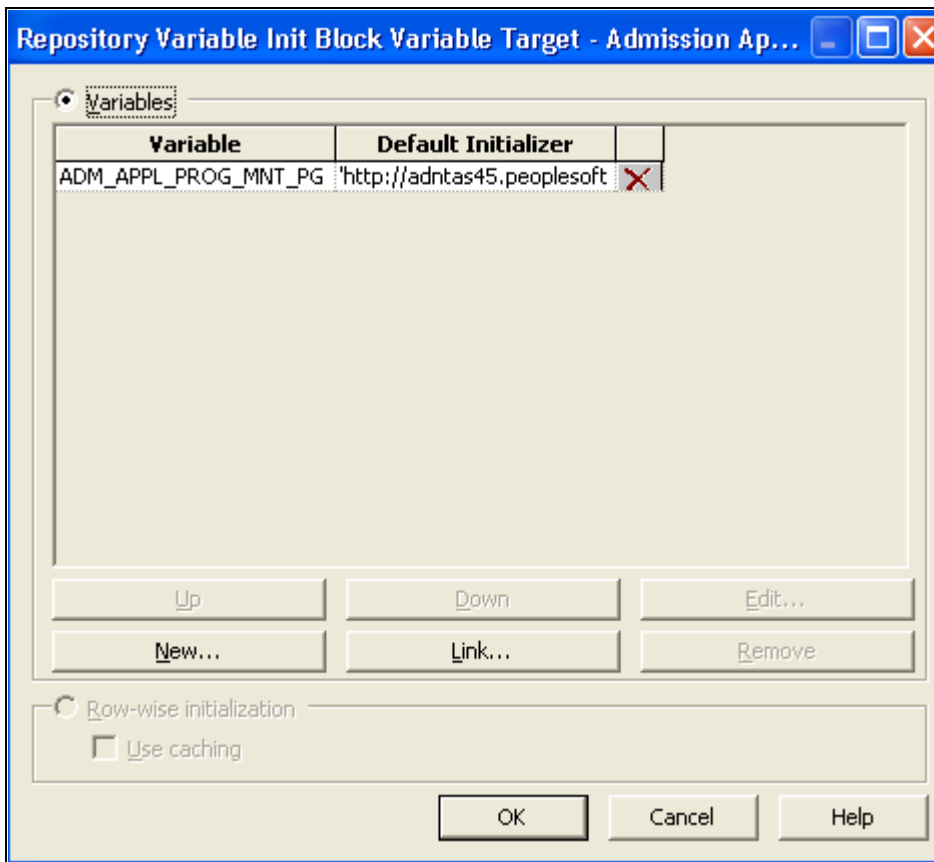
Cancel

Help

Repository Variable Init (Initialization) Block page



Repository Variable Init Block Data Source page



Repository Variable Init Block Variable Target page

In this example, you create an initialization block and dynamic repository variable to use to create the URL for the source system. You must create an initialization block for every online transaction system target page to which users will drill to from the Fusion Campus Solution Intelligence application.

This is an example of the data source default initialization string for one initialization block, which is defined with the component ID that was added to the PS\_SRC\_COMPONENT table in the previous step.

```
SELECT A.URI_TEXT_PSP
FROM PS_SRC_CONFIG A, PS_SRC_COMPONENT B
WHERE A.SRC_SYS_ID = B.SRC_SYS_ID
AND A.SRC_SYS_ID = 'HCM'
AND B.COMPONENT_ID='ADM_APPL_PROG_MNT'
```

This is an example of the variable target default initializer for the initialization block:

```
'http://adntas45.peoplesoft.com:
6300/psp/EM_HC890DV2_TS104539/EMPLOYEE/
HRMS/c/PROCESS_APPLICATIONS.ADM_APPL_
MAINTNCE.GBL?PAGE=ADM_APPL_PROG_MNT&
ADM_APPL_NBR=:1&INSTITUTION=:2&APPL_PROG_
NBR=:3&EMPLID=:4&ACAD_CAREER=:5'
```

Refer to the *Oracle Business Intelligence Server Administration Guide* for a discussion of initialization blocks and dynamic repository variables.

See *Oracle Business Intelligence Server Administration Guide*, "Using Variables in the OracleBI Repository," Process of Creating Initialization Blocks.

## Creating Logical Columns

Access the Logical Column page Oracle BI Administration Tool, Business Model and Mapping, <subject area folder>, <dimension>.

**Logical Column - Action Link**

General | Data Type | Aggregation | Levels

Name: Action Link

Belongs to Table: "Enterprise Warehouse"."Dimension Admission Appli

Sort order column: None [Set...] [Clear]

☒ Use existing logical columns as the source

```
'<a href="" || REPLACE( REPLACE( REPLACE( REPLACE(
REPLACE( VALUEOF("ADM_APPL_PROG_MNT_PG"), ':1',
"Enterprise Warehouse"."Dimension Admission Application
Status"."Application Number"), ':2', "Enterprise
Warehouse"."Dimension Institution"."Institution Code"), ':3',
CAST ("Enterprise Warehouse"."Dimension Admission
Application Status"."Application Program Number" AS
CHARACTER ( 1 ))), ':4', "Enterprise Warehouse"."Dimension
```

Description: This is the action link to the Enterprise Campus Solution Application Admission Maintenance Page.

[OK] [Cancel] [Help]

Logical Column page: General tab

In this example, you are creating the action link so that users can drill from the Admission Application Status dimension to the Admission Application page that is referenced in previous examples. Replace the parameters (such as :1, :2, and so on) with the dynamic key field values for the target page. For multiple parameters, use nested REPLACE functions.

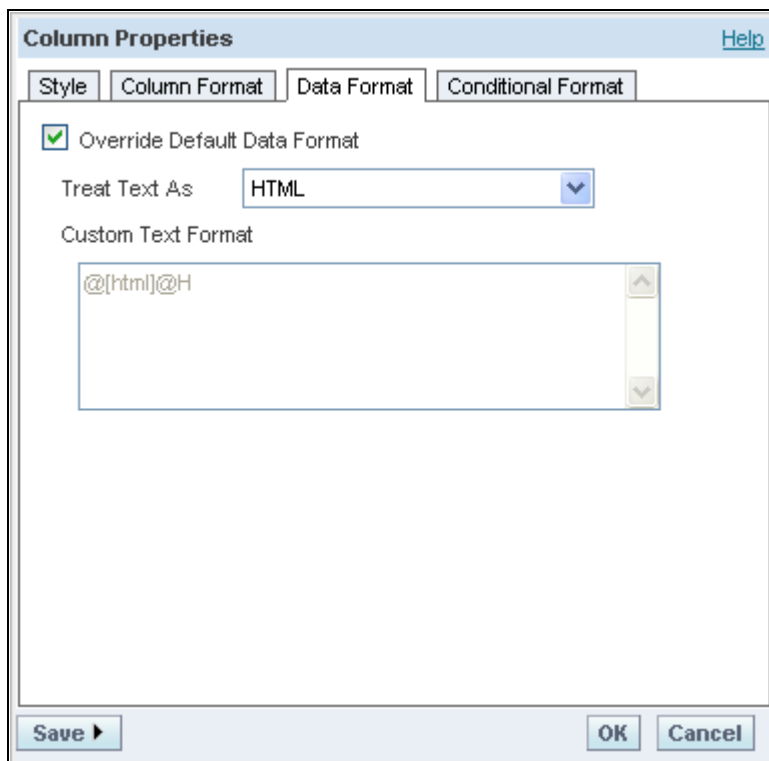
This is an example of setting up the Action Link logical column in the Business Model and Mapping layer so that you can drill to the Admission Application target page that is referenced in previous examples:

```
'<a href="" || REPLACE( REPLACE( REPLACE( REPLACE(
REPLACE( VALUEOF("ADM_APPL_PROG_MNT_PG"), ':1',
"Enterprise Warehouse"."Dimension Admission Application
Status"."Application Number"), ':2', "Enterprise
Warehouse"."Dimension Institution"."Institution Code"),
':3', CAST ("Enterprise Warehouse"."Dimension Admission
Application Status"."Application Program Number" AS
CHARACTER ( 1 )), ':4', "Enterprise Warehouse".
"Dimension Person"."Person Id"), ':5', "Enterprise
Warehouse"."Dimension Academic Career"."Academic
Career Code") || ' " TARGET=mywin>' || "Enterprise
Warehouse"."Dimension Admission Application Status".
"Application Number" || '</a>'
```

## Creating Answers With Drill in Place Capability

Now you are ready to use Oracle BI Answers to create a report that contains the logical column that you created in the previous example. When you run the report, you can drill to the correct transaction application page from a link on the report.

In Oracle BI Answers, after you drag the new logical column into your report layout, access the Column Properties page: Data Format tab for the new column. Change the data format so that the system treats the text as HTML, as shown in this example:



Column Properties page: Data Format tab



## Chapter 5

# Working with Delivered OBIEE Dashboards for the Campus Solutions Warehouse

This chapter provides an overview of Fusion Campus Solutions Intelligence dashboards and reports, and discusses:

- Prerequisites.
- Admissions and Recruiting Dashboard - Overview Page
- Admissions and Recruiting Dashboard - Recruiting Effectiveness Page
- Admissions and Recruiting Dashboard - Admission/Application Process Page
- Admissions and Recruiting Dashboard - Diversity Analysis Page
- Admissions and Recruiting Dashboard - Admissions Trend Analysis Page
- Student Administration Dashboard- Overview Page
- Student Administration Dashboard- Admissions and Recruiting Analysis Page
- Student Administration Dashboard- Student Records Analysis Page
- Student Administration Dashboard - Student Financials Analysis Page

---

## Prerequisites

Before you implement the Fusion Campus Solutions Intelligence application, you must implement:

- PeopleSoft Enterprise Campus Solutions Warehouse.
- PeopleSoft Enterprise Campus Solutions, which supplies transaction data to the Campus Solutions Warehouse.

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## Understanding Fusion Campus Solutions Intelligence Dashboards and Reports

The Fusion Campus Solutions Intelligence application delivers prebuilt dashboards and reports that provide an at-a-glance analysis of institution trends such as recruiting effectiveness, applicant levels, applicant diversity, student retention rates, and financial awards. A dashboard is a management tool that displays information about your institution using prepackaged reports and measures. Dashboards display the results of reports graphically in the form of bar charts, pie charts, tables, and so forth, to provide you with a birds eye view of your institution's performance. The Fusion Campus Solutions Intelligence dashboards provide actionable insight in various aspects of the student admission, recruiting, enrollment, student financials and other student administration processes.

The Fusion Campus Solutions Intelligence application delivers the metadata necessary to map data in the Campus Solutions Warehouse to dashboards and reports.

The Fusion Campus Solutions Intelligence application provides dashboard and reports for these business processes:

- Admissions and Recruiting
- Student Administration

### Admissions and Recruiting Dashboard

The Admissions and Recruiting dashboard is designed for director-level staff members who manage the overall admissions processes and oversee admissions officers and counselors. With the Admissions and Recruiting dashboard you can:

- Obtain a comprehensive view of recruiting and admissions for your institution.
- Identify and correct negative trends in recruiting and admissions.
- Measure inefficiencies in recruiting and admissions.

### Guided Analysis

The Fusion Campus Solutions Intelligence application provides guided analysis in which reports are linked from one to the other to lead users through logical steps of information discovery. In the Admissions and Recruiting Analysis page, the Prospect-to-Applicant-to-Student Rates This Year vs. Last Year report provides instructional text under the report title to indicate the guided analysis. You can click the link in the Table and Pivot Table views to launch the Applicant Status Details report to analyze details on applicant status.



## Dashboard and Report Prompts

The Fusion Campus Solutions Intelligence application provides dashboard and report *prompts*, which enable you to filter dashboard results and enhance data analysis. A dashboard prompt is a filter that affects all the content displayed on a dashboard page. A dashboard prompt with multiple columns can be used to further filter your subsequent selections. For example, if one column filters on a region, and the next column filters on districts, the district column can be constrained to show only districts in the region you select.

A report prompt provides general filtering of a column within a report. A report prompt can present all choices for a column, or, like a dashboard prompt, it can present constrained choices for a column. For example, if a request contains a Region = East filter, constraining choices for the City column restricts the selections to cities in the East region only. This eliminates the selection of a mutually exclusive filter that could result in no data.

## Drill in Place to Online Transaction Application

The Fusion Campus Solutions Intelligence application delivers the capability to seamlessly interact with the PeopleSoft Enterprise Campus Solutions transactional system to drive insight to action. Some reports provide a link for you to drill in place from the dashboard directly to the Maintain Applications component in the PeopleSoft Enterprise Campus Solutions transactional system. This drill in place functionality enables a recruiter or an admissions director to take the insight derived from the dashboard analysis to drive immediate action to help an applicant resolve pending issues in the application process.

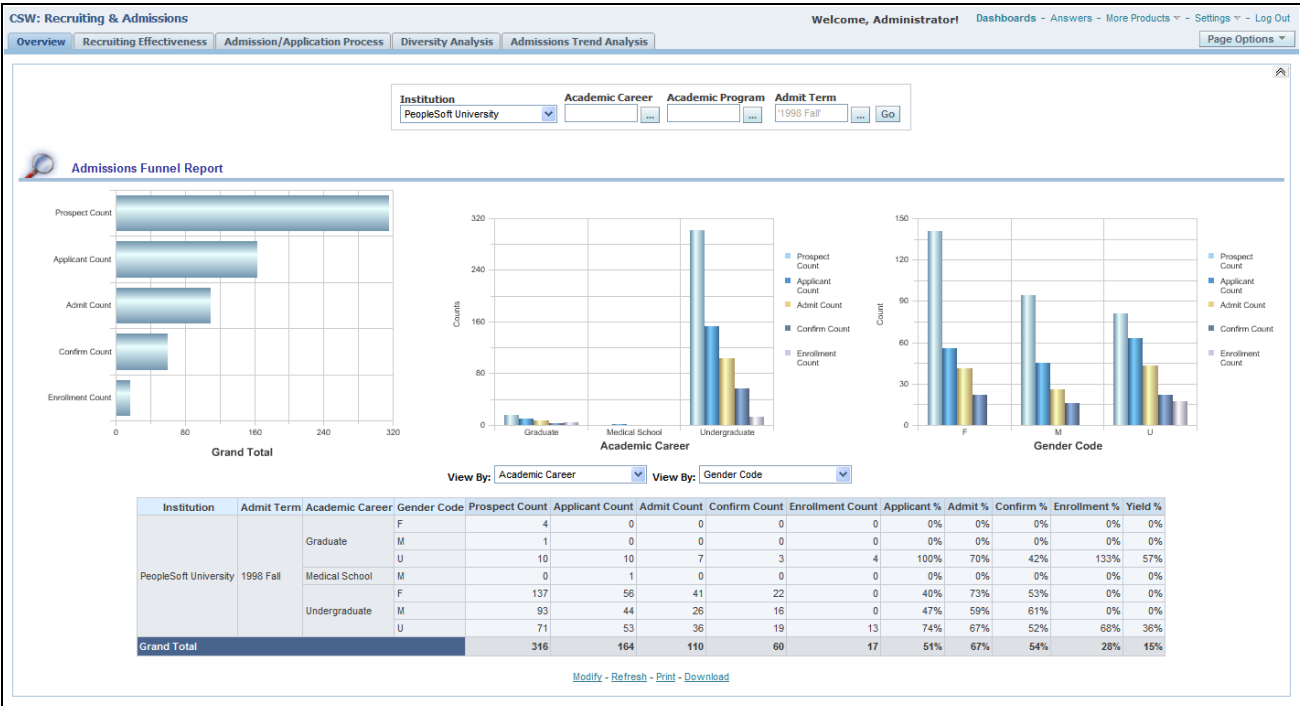
## Delivered Security Group

An Oracle BI Server and Oracle Presentation Catalog security group named *CS (Campus Solutions) Administrator* is delivered with the Fusion Campus Solutions Intelligence application.

---

## Using the Admissions and Recruiting Dashboard - Overview Page

Access the Admissions and Recruiting - Overview page (CSW Reports, CSW: Recruiting and Admissions, Overview).



Admissions and Recruiting - Overview Page

| Usage   | Reports   | Dashboard Prompt  |
|---|---|---|
| Provides you with a birds eye view of the Prospect to applicant to admit and enrollees numbers, ratios and yields for your institution. | This page is comprised of the Admissions Funnel report. | Use the Admissions and Recruiting - Overview page prompt to filter page results by: <ul style="list-style-type: none"><li>Academic Career</li><li>Academic Program</li><li>Institution</li><li>Admit Term</li></ul> |

Admissions Funnel Report

Access the Admissions Funnel report, which provides you with an overview of student prospect, applicant, admit, and enrollment measures for your institution.



Admissions Funnel Report

| X,Y Axis Data for Bar Chart 1   | X,Y Axis Data for Bar Chart 2  | X,Y Axis Data for Bar Chart 3   |
|---|--|---|
| The first Admissions Funnel graph displays Prospect Count, Applicant Count, Admit Count, Confirm Count, and Enrollment Count data on the x-axis and total count data on the y-axis. | The second Admissions Funnel graph displays Academic Career data on the x-axis and Prospect Count, Applicant Count, Admit Count, Confirm Count, and Enrollment Count data on the y-axis. | The third Admissions Funnel graph displays Gender Code data on the x-axis and Prospect Count, Applicant Count, Admit Count, Confirm Count, and Enrollment Count data on the y-axis. |

| <b>View by Filter (Left)</b>   | <b>View by Filter (Right)</b>   |
|--|---|
| <p>Use this filter to view the second Admissions Funnel graph results by:</p> <ul style="list-style-type: none"> <li>• <i>Academic Career</i> (default)</li> <li>• <i>Academic Load</i></li> <li>• <i>Academic Plan</i></li> <li>• <i>Academic Program</i></li> <li>• <i>Admit Type</i></li> <li>• <i>Application Center</i></li> <li>• <i>Ethnic Group</i></li> <li>• <i>Gender Code</i></li> <li>• <i>Last School Attended</i></li> <li>• <i>Official Residence</i></li> <li>• <i>Recruiting Center</i></li> </ul> | <p>Use this filter to view the third Admissions Funnel graph results by:</p> <ul style="list-style-type: none"> <li>• <i>Academic Career</i> (default value for first filter)</li> <li>• <i>Academic Load</i></li> <li>• <i>Academic Plan</i></li> <li>• <i>Academic Program</i></li> <li>• <i>Admit Type</i></li> <li>• <i>Application Center</i></li> <li>• <i>Ethnic Group</i></li> <li>• <i>Gender Code</i> (default)</li> <li>• <i>Last School Attended</i></li> <li>• <i>Official Residence</i></li> <li>• <i>Recruiting Center</i></li> <li>• <i>Region</i></li> </ul> |

The following table lists the columns and measures used in the Admissions Funnel report.

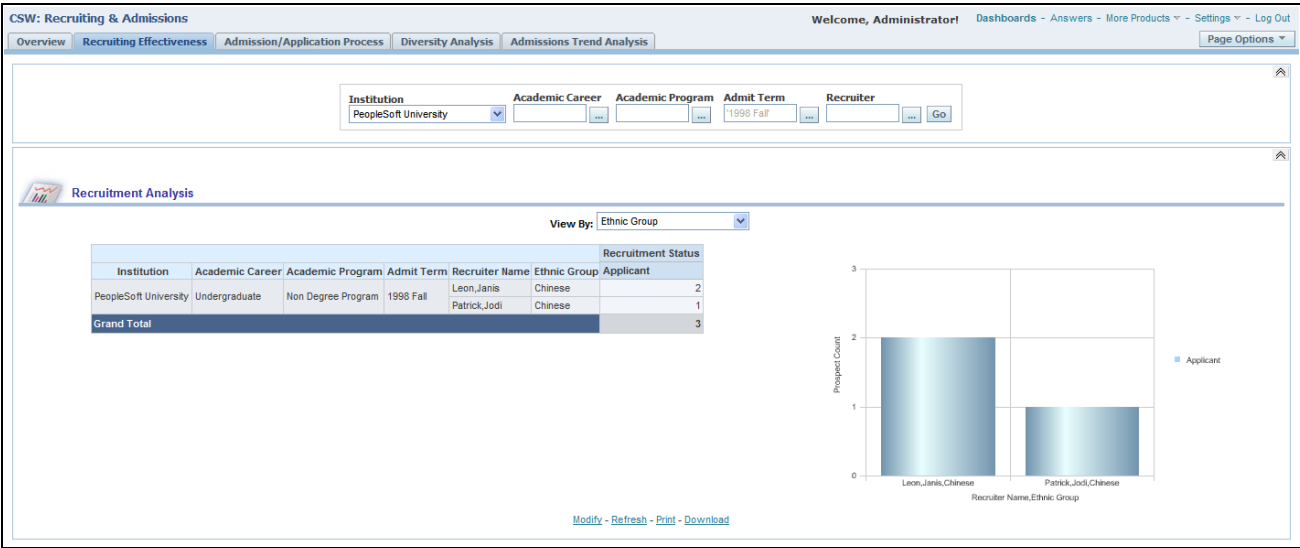
| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>       |
|-------------------------------------|---|
| Academic Career                     | Academic Career (D_ACAD_CAR) Dimension      |
| Academic Load                       | Academic Load (D_ACAD_LOAD) Dimension       |
| Academic Plan                       | Academic Plan (D_ACAD_PLAN) Dimension       |
| Academic Program                    | Academic Program (D_ACAD_PROG) Dimension    |
| Admit Term                          | Admit Term (D_TERM) Dimension               |
| Admit Type                          | Admit Type (D_ADMIT_TYPE) Dimension         |
| Application Center                  | Application Center (D_APPL_CNTR) Dimension  |
| Ethnic Group                        | Person (D_PERSON) Dimension                 |
| Gender Code                         | Person (D_PERSON) Dimension                 |
| Institution                         | Institution (D_INSTITUTION) Dimension       |
| Last School Attended                | External Organization (D_EXT_ORG) Dimension |

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>   |
|-------------------------------------|---|
| Official Residence                  | Person Attribute (D_PERSON_ATTR) Dimension  |
| Recruiting Center                   | Recruiting Center (D_RECRT_CNTR) Dimension  |
| Region                              | Region (D_REGION_CS) Dimension  |
| Admit %                             | IFNULL(100*"Fact Admission Funnel"."Admit Count"/("Fact Admission Funnel"."Applicant Count"), 0)      |
| Admit Count                         | Admission Funnel (F_ADM_FUNNEL) Fact  |
| Applicant %                         | IFNULL(100*"Fact Admission Funnel"."Applicant Count"/("Fact Admission Funnel"."Prospect Count"), 0)   |
| Applicant Count                     | Admission Funnel (F_ADM_FUNNEL) Fact  |
| Confirm %                           | IFNULL(100 * "Fact Admission Funnel"."Confirm Count"/("Fact Admission Funnel"."Admit Count"), 0)      |
| Confirm Count                       | Admission Funnel (F_ADM_FUNNEL) Fact  |
| Enrollment %                        | IFNULL(100 * "Fact Admission Funnel"."Enrollment Count"/("Fact Admission Funnel"."Confirm Count"), 0) |
| Enrollment Count                    | Admission Funnel (F_ADM_FUNNEL) Fact  |
| Prospect Count                      | Admission Funnel (F_ADM_FUNNEL) Fact  |
| Yield %                             | IFNULL(100 * "Fact Admission Funnel"."Enrollment Count"/("Fact Admission Funnel"."Admit Count"), 0)   |

---

## Using the Admissions and Recruiting Dashboard - Recruiting Effectiveness Page

Access the Recruiting Effectiveness page (CSW Reports, CSW: Recruiting and Admissions, Recruiting Effectiveness).

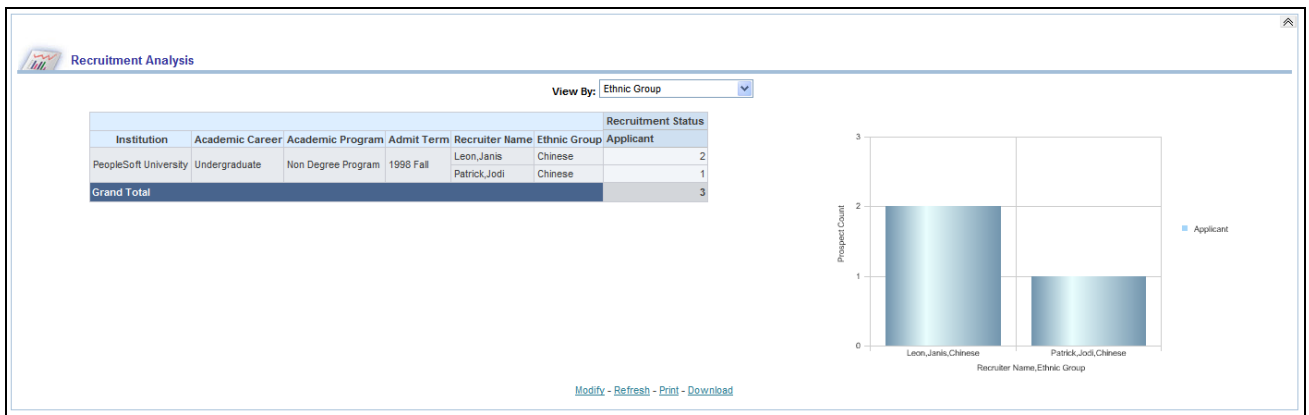


Recruiting Effectiveness Page

| Usage   | Reports  | Dashboard Prompt   |
|---|--|--|
| Provides you with a birds eye view of your recruiting effectiveness and recruiting trends for your institution. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>Recruitment Analysis report</li><li>Recruiting Trends report</li></ul> | <p>Use the Recruiting Effectiveness page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Institution</li><li>Academic Program</li><li>Admit Term</li><li>Recruiter</li></ul> |

Recruitment Analysis Report

Access the Recruitment Analysis Report, which provides insight into recruiting effectiveness and delivers details about recruiter prospects and applicants.



## Recruitment Analysis Report

| <b><i>X,Y Axis Data</i></b>   | <b><i>View By Filter</i></b>   |
|---|--|
| <p>The Recruitment Analysis graph displays <i>Recruiter Name</i> data on the x-axis and <i>Prospect Count</i> data on the y-axis, with <i>Ethnic Group</i> data plotted across the x/y-axis.</p> <p>The x/y-axis can also plot any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"> <li><i>Admit Type</i></li> <li><i>Ethnic Group</i> (default value)</li> <li><i>Last School Attended</i></li> <li><i>Referral Source</i></li> <li><i>Recruiting Status</i></li> <li><i>State</i></li> </ul> | <p>Use this filter to view the Recruitment Analysis report results by:</p> <ul style="list-style-type: none"> <li><i>Admit Type</i></li> <li><i>Ethnic Group</i> (default value)</li> <li><i>Last School Attended</i></li> <li><i>Referral Source</i></li> <li><i>Recruiting Status</i></li> <li><i>State</i></li> </ul> |

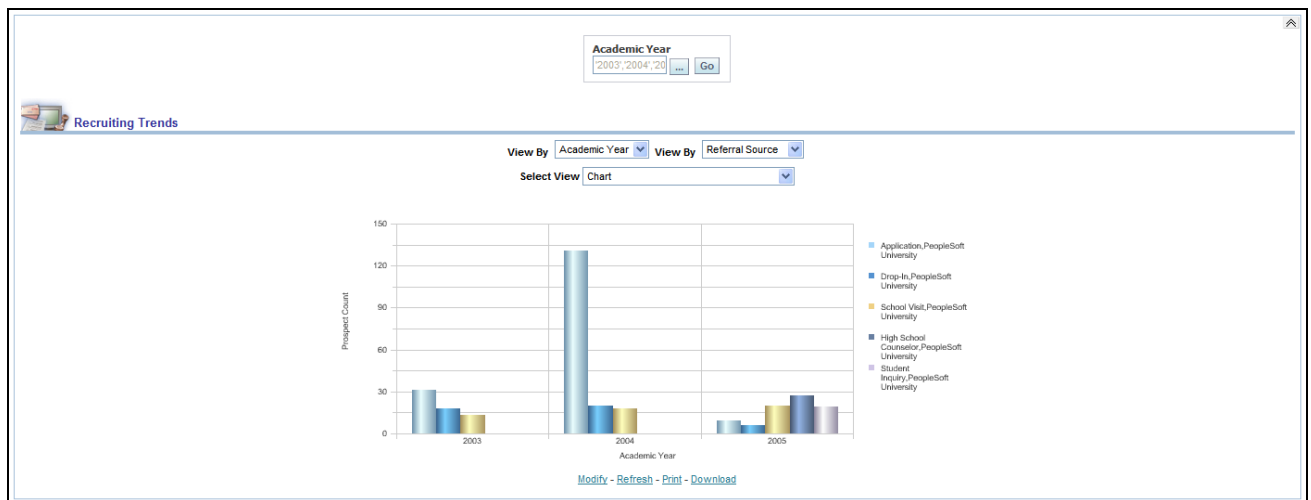
The following table lists the columns and measures used in the Recruitment Analysis report.

| <b><i>Report Column / Measure Name</i></b> | <b><i>Report Column / Measure Origin</i></b> |
|--|--|
| Academic Career                            | Academic Career (D_ACAD_CAR) Dimension       |
| Academic Program                           | Academic Program (D_ACAD_PROG) Dimension     |
| Admit Term                                 | Admit Term (D_TERM) Dimension                |
| Admit Type                                 | Admit Type (D_ADMIT_TYPE) Dimension          |
| Ethnic Group                               | Person (D_PERSON) Dimension                  |
| Institution                                | Institution (D_INSTITUTION) Dimension        |
| Last School Attended                       | External Organization (D_EXT_ORG) Dimension  |

| Report Column / Measure Name | Report Column / Measure Origin                |
|------------------------------|---|
| Prospect State               | Person Address (D_PERSON_ADDR) Dimension      |
| Recruiter Name               | Prospect Recruiter (D_PRSPCT_RECTR) Dimension |
| Recruiting Status            | Recruiting Status (D_RECRT_STAT) Dimension    |
| Referral Source              | Referral Source (D_RFRL_SRC) Dimension        |
| Prospect Count               | Admission Funnel (F_ADM_FUNNEL) Fact          |

## Recruiting Trends Report

Access the Recruiting Trends report, which provides insight into recruiting trends for your institution and delivers details about recruiting centers, referral sources, recruiting status, and so forth.



Recruiting Trends Report



| <b><i>X,Y Axis Data</i></b>   | <b><i>Academic Year Filter</i></b>                                      |
|---|---|
| <p>The Recruiting Trends graph displays <i>Academic Year</i> data on the x-axis and <i>Prospect Count by Referral Source</i> data on the y-axis.</p> <p>The x-axis can also display <i>Admit Term</i> data, depending on your selection in the first View by filter.</p> <p>You can also group the y-axis prospect count value by any of the following dimensions, depending on your selection in the second View By filter:</p> <ul style="list-style-type: none"> <li>• <i>Recruiting Center</i></li> <li>• <i>Recruiting Status</i></li> <li>• <i>Referral Source</i> (default)</li> </ul> <p><b>Note.</b> You can click on graph data to review drill down data for a particular admit term or academic year.</p> | <p>Use this filter to refine the report results to a specific year.</p> |

| <b><i>View By Filters</i></b>   | <b><i>Select View Filter</i></b>   |
|---|--|
| <p>Use this filter to view the report results by:</p> <ul style="list-style-type: none"> <li>• <i>Academic Year</i> (default value, available in the first filter only)</li> <li>• <i>Admit Term</i> (available in the first filter only)</li> <li>• <i>Recruiting Center</i> (available in the second filter only)</li> <li>• <i>Recruiting Status</i> (available in the second filter only)</li> <li>• <i>Referral Source</i> (default value, available in the second filter only)</li> </ul> | <p>Use this filter to:</p> <ul style="list-style-type: none"> <li>• present the data as a function of prospect count, year over year</li> <li>• present the data as a function of prospect count, percent of year total</li> </ul> |

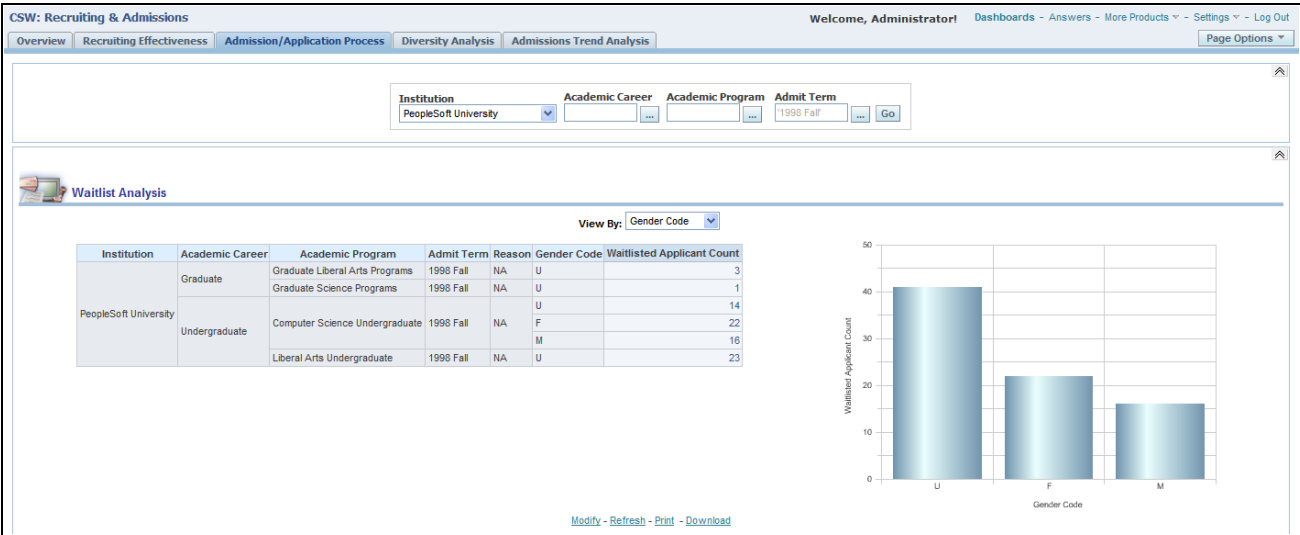
The following table lists the columns and measures used in the Recruiting Trends report.

| <b><i>Report Column Name</i></b> | <b><i>Report Column Origin</i></b>         |
|----------------------------------|--|
| Academic Career                  | Academic Career (D_ACAD_CAR) Dimension     |
| Admit Academic Year              | Admit Term (D_TERM) Dimension              |
| Admit Term                       | Admit Term (D_TERM) Dimension              |
| Institution                      | Institution (D_INSTITUTION) Dimension      |
| Recruiting Center                | Recruiting Center (D_RECRT_CNTR) Dimension |
| Recruiting Status                | Recruiting Status (D_RECRT_STAT) Dimension |
| Referral Source                  | Referral Source (D_RFRL_SRC) Dimension     |

| Report Column Name | Report Column Origin                 |
|--------------------|--------------------------------------|
| Prospect Count     | Admission Funnel (F_ADM_FUNNEL) Fact |

## Using the Admissions and Recruiting Dashboard - Admission/Application Process Page

Access the Admission/Application Process page (CSW Reports, CSW: Recruiting and Admissions, Admission/Application Process).

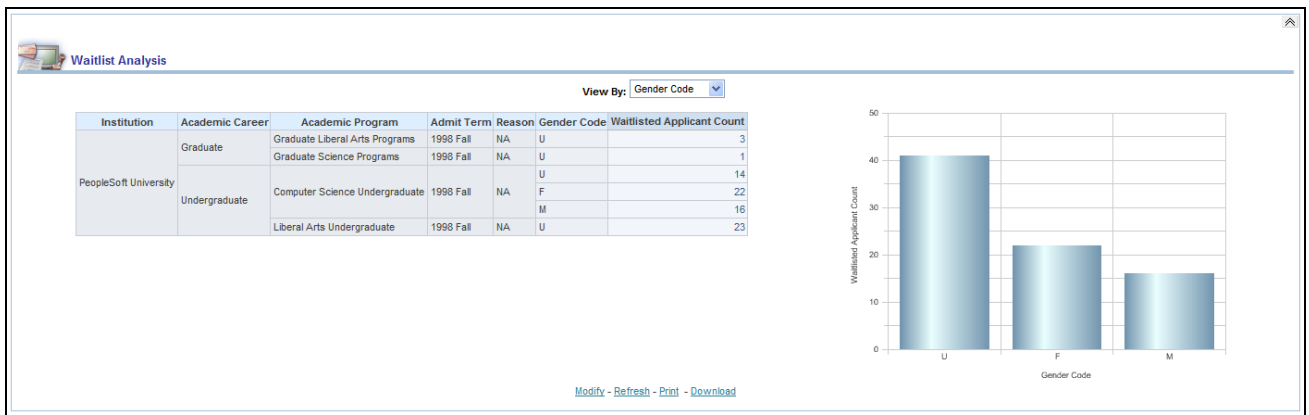


Admission/Application Process page

| Usage   | Reports   | Dashboard Prompt  |
|---|---|---|
| Provides you with an overview of the effectiveness of your admissions and application process for your institution. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>Waitlist Analysis report</li><li>Checklist Analysis report</li><li>Student Response Analysis report</li><li>Student Response Analysis Reason report</li></ul> | <p>Use the Admission/Application Process page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Institution</li><li>Academic Career</li><li>Academic Program</li><li>Admit Term</li></ul> |

## Waitlist Analysis Report

Access the Waitlist Analysis report, which enables you to evaluate the results of your waitlist strategy and provides details about waitlisted applicants by academic career, academic program, gender, admit term, and so forth.



### Waitlist Analysis report

| <i><b>X,Y Axis Data</b></i>  | <i><b>View By Filter</b></i>   |
|--|--|
| <p>The Waitlist Analysis graph displays <i>Gender Code</i> data on the x-axis and <i>Waitlisted Applicant Count</i> data on the y-axis.</p> <p>The x-axis can also display any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"> <li><i>Admit Type</i></li> <li><i>Ethnic Category</i></li> <li><i>Ethnic Group</i></li> <li><i>Gender Code</i> (default)</li> </ul> <p><b>Note.</b> You can click on graph data to review drill down data for a particular gender code, ethnic group, and so forth.</p> | <p>Use this filter to view the report results by:</p> <ul style="list-style-type: none"> <li><i>Admit Type</i></li> <li><i>Ethnic Category</i></li> <li><i>Ethnic Group</i></li> <li><i>Gender Code</i> (default)</li> </ul> |

The following table lists the columns and measures used in the Waitlist Analysis report.

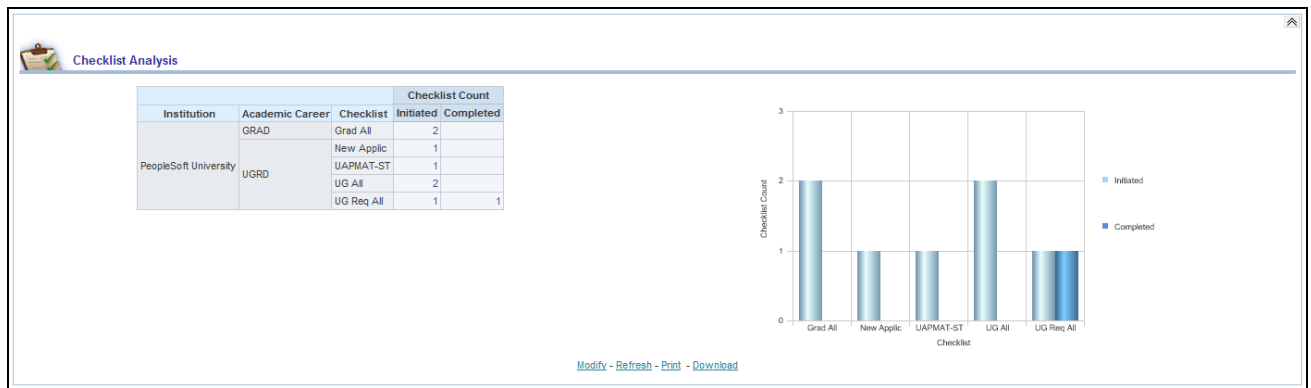
| <i><b>Report Column / Measure Name</b></i> | <i><b>Report Column / Measure Origin</b></i> |
|--|--|
| Academic Career                            | Academic Career (D_ACAD_CAR) Dimension       |
| Academic Program                           | Academic Program (D_ACAD_PROG) Dimension     |
| Admit Term                                 | Admit Term (D_TERM) Dimension                |
| Admit Type                                 | Admit Type (D_ADMIT_TYPE) Dimension          |
| Ethnic Category                            | Person (D_PERSON) Dimension                  |
| Ethnic Group                               | Person (D_PERSON) Dimension                  |
| Gender Code                                | Person (D_PERSON) Dimension                  |

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>               |
|-------------------------------------|---|
| Institution                         | Institution (D_INSTITUTION) Dimension               |
| Reason                              | Program Action Reason (D_PROG_ACN_RSN) Dimension    |
| Waitlist Applicant Count            | Admission Application Status (F_ADM_APPL_STAT) Fact |

## Checklist Analysis Report

The Checklist Analysis report enables you to track checklists for students and external organizations.

Typically, checklist functionality supports the recruitment function by tracking lists of requirements between the university admissions office and prospective or accepted students.



### Checklist Analysis report

The Checklist Analysis graph displays *Checklist (type)* by *Initiated / Completed* data on the x-axis and *Checklist Count* data on the y-axis.

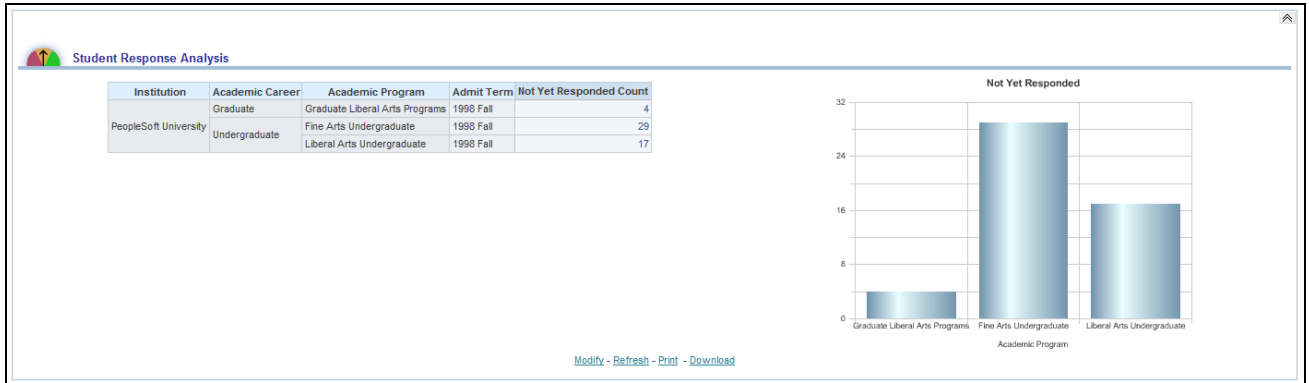
The following table lists the columns and measures used in the Checklist Analysis report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>      |
|-------------------------------------|--|
| Academic Career                     | Academic Career (D_ACAD_CAR) Dimension     |
| Institution                         | Institution (D_INSTITUTION) Dimension      |
| Checklist (Code)                    | Checklist Code (D_CHKLST_CD) Dimension     |
| Checklist Status                    | Checklist Status (D_CHKLST_STAT) Dimension |
| Checklist Count                     | Checklist Person (F_CHKLST_PERSON) Fact    |

## Student Response Analysis Report

Access the Student Response Analysis report, which enables you to evaluate the number of student responses by academic career, academic program, admit term, and so forth.

The Student Response Analysis report details student responses (positive or negative) for an application.



### Student Response Analysis report

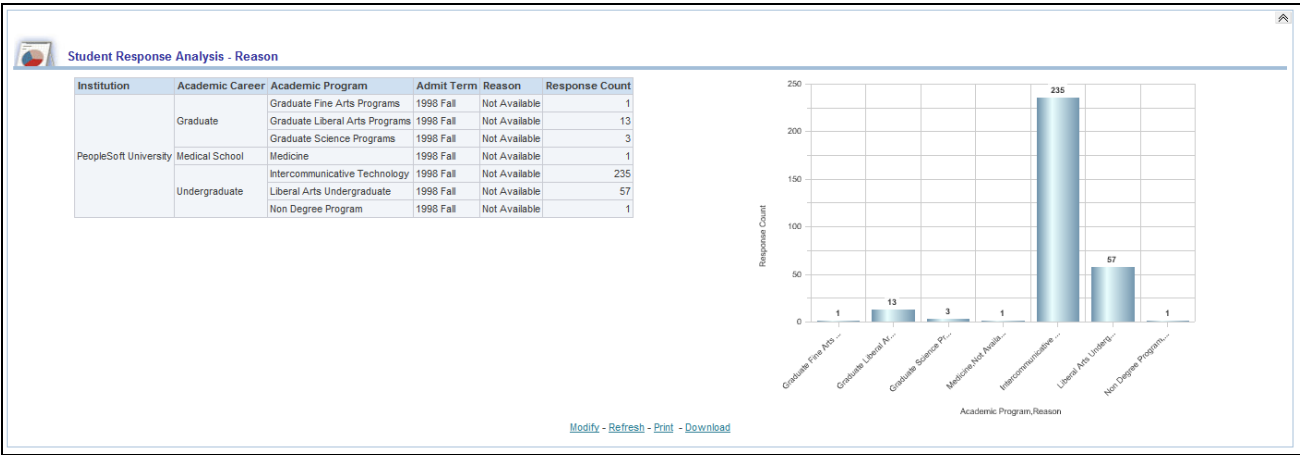
The Student Response Analysis graph displays *Academic Program* data on the x-axis and *Admit Count* data on the y-axis.

The following table lists the columns and measures used in the Student Response Analysis report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>    |
|-------------------------------------|--|
| Academic Career                     | Academic Career (D_ACAD_CAR) Dimension   |
| Academic Program                    | Academic Program (D_ACAD_PROG) Dimension |
| Admit Term                          | Admit Term (D_TERM) Dimension            |
| Institution                         | Institution (D_INSTITUTION) Dimension    |
| Program Status                      | Program Status (D_PROG_STAT) Dimension   |
| Admit Count                         | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Confirm Count                       | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Enrollment Count                    | Admission Funnel (F_ADM_FUNNEL) Fact     |

## Student Response Analysis Reason Report

Access the Student Response Analysis Reason report, which enables you to evaluate the number of student responses and reason by academic career, academic program, admit term, and so forth. The Student Response Analysis Reason report details student response reasons for an application.



Student Response Analysis Reason report

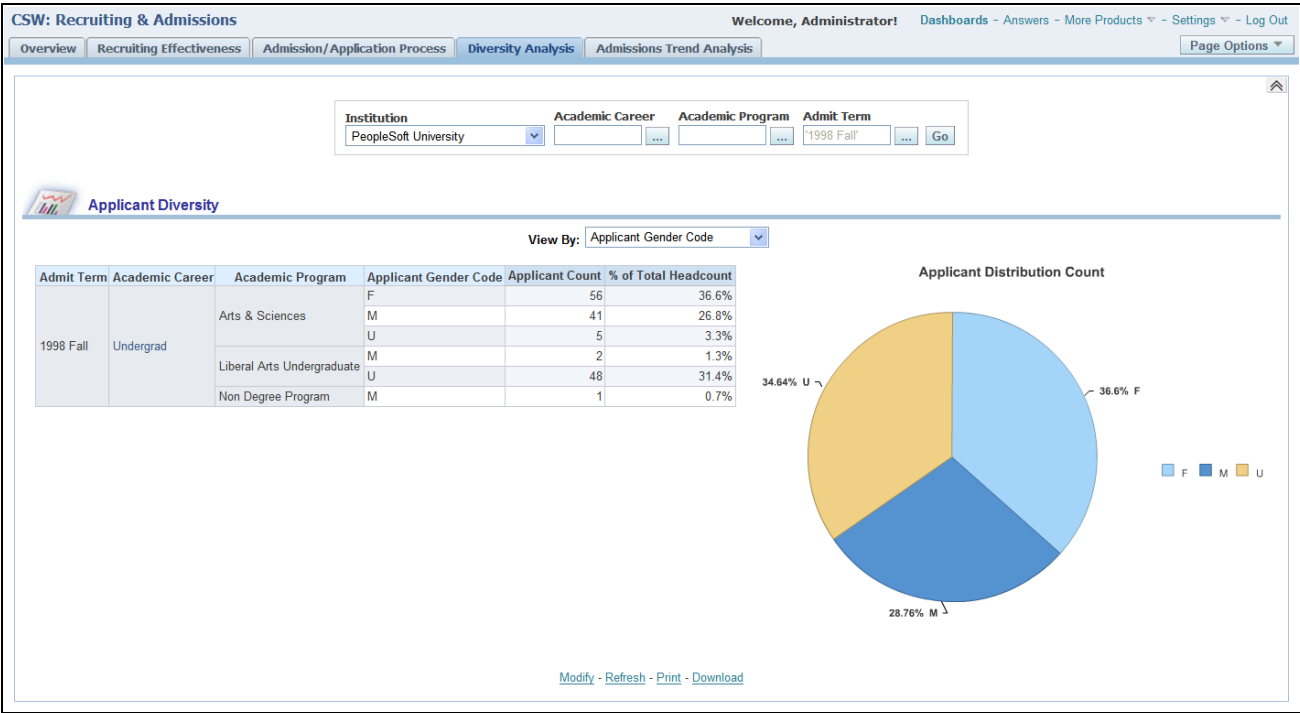
The Student Response Analysis Reason graph displays *Academic Program* by *Reason* data on the x-axis and *Response Count* data on the y-axis.

The following table lists the columns and measures used in the Student Response Analysis - Reason report.

| Report Column / Measure Name | Report Column / Measure Origin           |
|------------------------------|--|
| Academic Career              | Academic Career (D_ACAD_CAR) Dimension   |
| Academic Program             | Academic Program (D_ACAD_PROG) Dimension |
| Admit Term                   | Admit Term (D_TERM) Dimension            |
| Institution                  | Institution (D_INSTITUTION) Dimension    |
| Reason                       | Response Reason (D_RESP_RSN) Dimension   |
| Response Count               | Student Response (F_STDNT_RESP) Fact     |

# Using the Admissions and Recruiting Dashboard - Diversity Analysis Page

Access the Diversity Analysis page (CSW Reports, CSW: Recruiting and Admissions, Diversity Analysis).

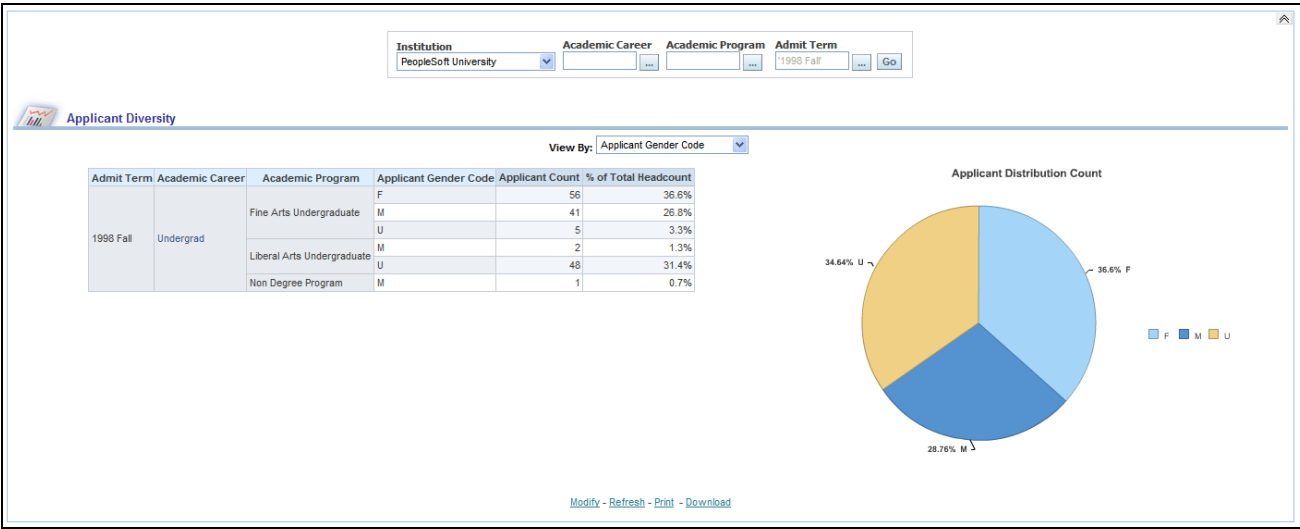


Diversity Analysis page

| Usage   | Reports  | Dashboard Prompt   |
|---|--|--|
| Provides you with a birds eye view of the diversity of the student population admitted into your institution. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Applicant Diversity report</li><li>Undergraduate Admissions report</li></ul> | <div>Use the Diversity Analysis page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Institution</li><li>Academic Career</li><li>Academic Program</li><li>Admit Term</li></ul> |

Applicant Diversity Report

Access the Applicant Diversity report, which enables you to evaluate the diversity of the student population admitted into your institution, delivering details about the gender and ethnic group to which students belong.



Applicant Diversity Report

| Pie Chart Data   | View By Filter  |
|--|---|
| <p>The Applicant Diversity pie chart displays <i>Applicant Count</i> data grouped by <i>Applicant Gender Code</i>.</p> <p>Applicant count data can also be grouped by any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"><li><i>Applicant Ethnic Category</i></li><li><i>Applicant Ethnic Group</i></li><li><i>Applicant Gender Code</i> (default)</li></ul> | <p>Use this filter to filter report results by:</p> <ul style="list-style-type: none"><li><i>Applicant Ethnic Category</i></li><li><i>Applicant Ethnic Group</i></li><li><i>Applicant Gender Code</i> (default)</li></ul> |

The following table lists the columns and measures used in the Applicant Diversity report.

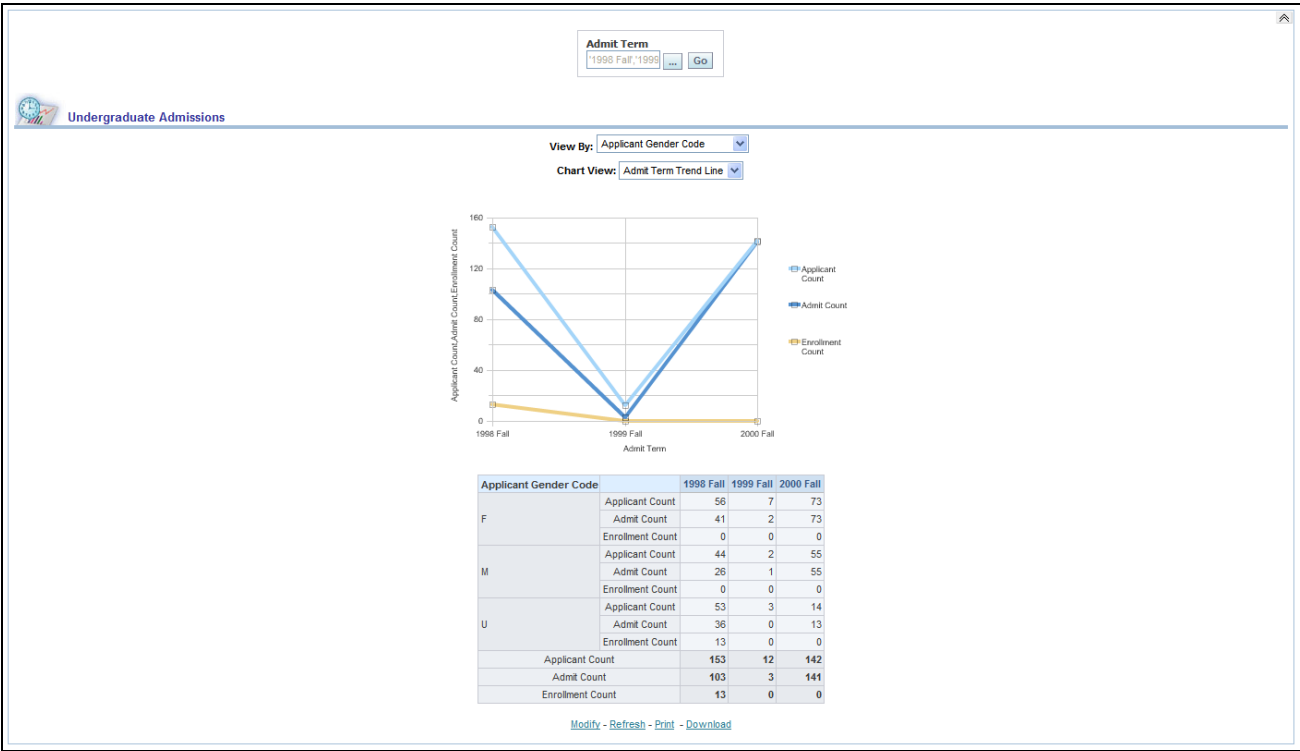
| Column / Measure Name     | Column / Measure Origin                             |
|---------------------------|---|
| Academic Career           | Academic Career (D_ACAD_CAR) Dimension              |
| Academic Program          | Academic Program (D_ACAD_PROG) Dimension            |
| Admit Term                | Admit Term (D_TERM) Dimension                       |
| Applicant Ethnic Category | Person (D_PERSON) Dimension                         |
| Applicant Ethnic Group    | Person (D_PERSON) Dimension                         |
| Applicant Gender Code     | Person (D_PERSON) Dimension                         |
| Applicant Count           | Admission Application Status (F_ADM_APPL_STAT) Fact |



| <i>Column / Measure Name</i> | <i>Column / Measure Origin</i>             |
|------------------------------|--|
| % of Total Headcount         | (Applicant Count / Total Applicants) * 100 |

## Undergraduate Admissions Report

Access the Undergraduate Admissions report, which enables you to evaluate the diversity of the undergraduate student population admitted into your institution and determine the gender and ethnic group to which those students belong.



Undergraduate Admissions Report

|  |   |
|--|---|
| <b>X,Y Axis Data</b>   | <b>Admit Term Filter</b>  |
| The Undergraduate Admissions chart displays <i>Admit Term</i> data on the x-axis and <i>Applicant Count</i> , <i>Admit Count</i> , and <i>Enrollment Count</i> data on the y-axis.     | Use this filter to refine the report results to a specific admit semester and year.   |
| <b>View By Filter</b>  | <b>Chart View Filter</b>  |
| Use this filter to view the table report results by: <ul style="list-style-type: none"><li><i>Applicant Ethnic Group Code</i></li><li><i>Applicant Gender Code</i> (default)</li></ul> | Use this filter to: <ul style="list-style-type: none"><li>view the data in trend line format by admit term</li><li>view the data in bar chart format by diversity</li></ul> |

The following table lists the columns and measures used in the Undergraduate Admissions report.

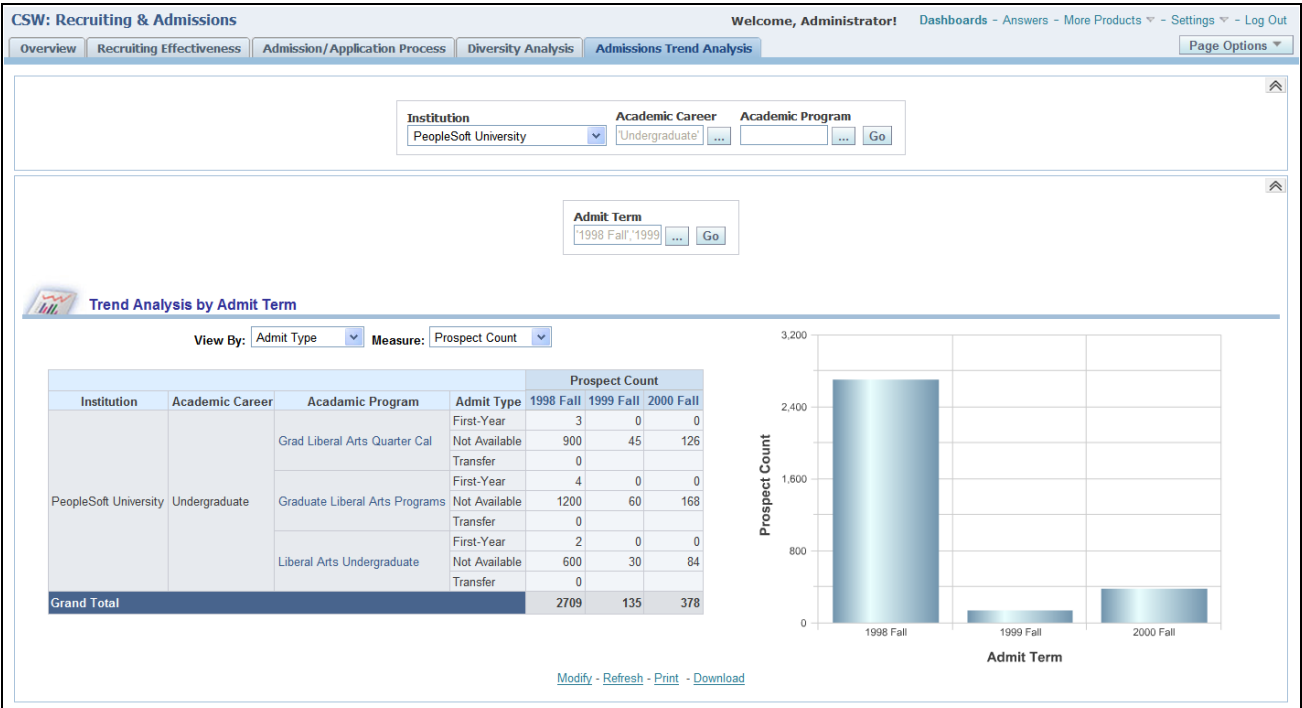
|                                     |  |
|-------------------------------------|--|
| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>  |
| Academic Career                     | Academic Career (D_ACAD_CAR) Dimension |
| Admit Term                          | Admit Term (D_TERM) Dimension          |
| Applicant Gender Code               | Person (D_PERSON) Dimension            |
| Applicant Ethnic Group              | Person (D_PERSON) Dimension            |

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>               |
|-------------------------------------|---|
| Admit Count                         | Admission Funnel (F_ADM_FUNNEL) Fact                |
| Applicant Count                     | Admission Application Status (F_ADM_APPL_STAT) Fact |
| Enrollment Count                    | Admission Funnel (F_ADM_FUNNEL) Fact                |

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## Using the Admissions and Recruiting Dashboard - Admissions Trend Analysis Page

Access the Admissions Trend Analysis page (CSW Reports, CSW: Recruiting and Admissions, Admissions Trend Analysis).

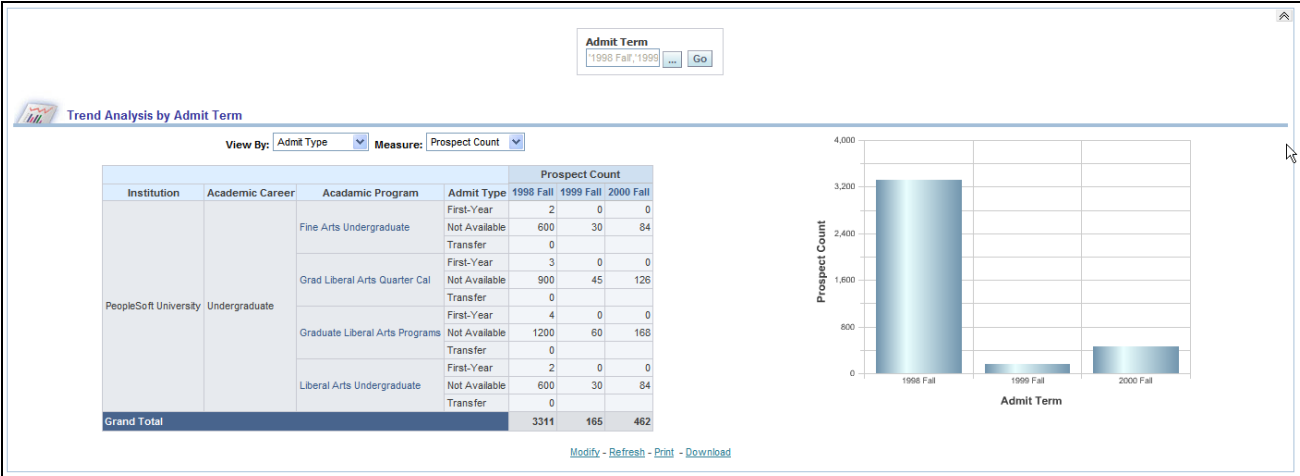


Admissions Trend Analysis page

| Usage  | Reports  | Dashboard Prompt   |
|--|--|--|
| Provides you with a birds eye view of student applicants and related information, such as academic career and residency. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Trend Analysis By Admit Term report</li><li>Trend Analysis By Academic Year report</li><li>Applicant Trends - Admission and Recruitment report</li></ul> | <div>Use the Admissions Trend Analysis page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Institution</li><li>Academic Career</li><li>Academic Program</li></ul> |

Trend Analysis By Admit Term Report

Access the Trend Analysis By Admit Term report, which enables you to evaluate which academic programs students are inquiring about by admit term.



Trend Analysis By Admit Term report

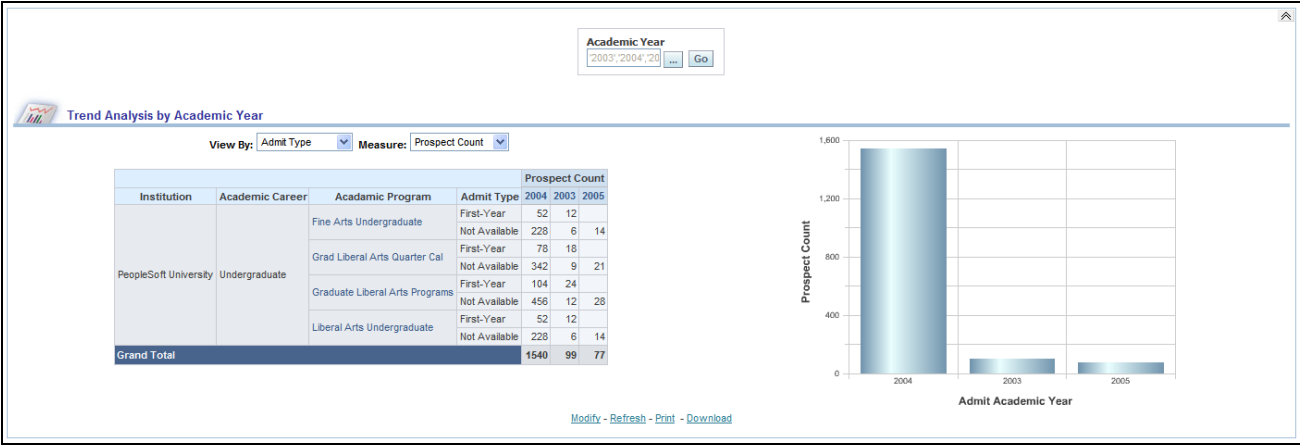
|   |   |
|---|---|
| <b>X,Y Axis Data</b> <p>The Trend Analysis By Admit Term bar chart displays <i>Admit Term</i> data on the x-axis and <i>Prospect Count</i> data on the y-axis.</p> <p>The y-axis can also display any of the following measures, depending on your Measure filter selection:</p> <ul style="list-style-type: none"><li><i>Admit Count</i></li><li><i>Applicant Count</i></li><li><i>Confirm Count</i></li><li><i>Enrollment Count</i></li><li><i>Prospect Count</i> (default value)</li></ul> | <b>Admit Term Filter</b> <p>Use this filter to refine the report results to a specific admit term (year and semester).</p>  |
| <b>View By Filter</b> <p>Use this filter to view the table report results by:</p> <ul style="list-style-type: none"><li><i>Academic Level</i></li><li><i>Admit Type</i> (default value)</li></ul>   | <b>Measure Filter</b> <p>Use this filter to view report results by the following measures:</p> <ul style="list-style-type: none"><li><i>Admit Count</i></li><li><i>Applicant Count</i></li><li><i>Confirm Count</i></li><li><i>Enrollment Count</i></li><li><i>Prospect Count</i> (default value)</li></ul> |

The following table lists the columns and measures used in the Trend Analysis By Admit Term report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>    |
|-------------------------------------|--|
| Academic Career                     | Academic Career (D_ACAD_CAR) Dimension   |
| Academic Level                      | Academic Level (D_ACAD_LVL) Dimension    |
| Academic Program                    | Academic Program (D_ACAD_PROG) Dimension |
| Admit Academic Year                 | Admit Term (D_TERM) Dimension            |
| Admit Term                          | Admit Term (D_TERM) Dimension            |
| Admit Type                          | Admit Type (D_ADMIT_TYPE) Dimension      |
| Institution                         | Institution (D_INSTITUTION) Dimension    |
| Admit Count                         | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Applicant Count                     | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Confirm Count                       | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Enrollment Count                    | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Prospect Count                      | Admission Funnel (F_ADM_FUNNEL) Fact     |

## Trend Analysis By Academic Year Report

Access the Trend Analysis By Academic Year report, which enables you to evaluate which academic programs students are inquiring about by academic year.



Trend Analysis By Academic Year report

| X,Y Axis Data  | Academic Year Filter  |
|--|---|
| <p>The Trend Analysis By Academic Year graph displays <i>Admit Academic Year</i> data on the x-axis and <i>Prospect Count</i> data on the y-axis.</p> <p>The y-axis can also display any of the following measures, depending on your Measure filter selection:</p> <ul style="list-style-type: none"><li><i>Admit Count</i></li><li><i>Applicant Count</i></li><li><i>Confirm Count</i></li><li><i>Enrollment Count</i></li><li><i>Prospect Count</i> (default value)</li></ul> | <p>Use this filter to refine the report results to a specific year.</p> |

| View By Filter  | Measure Filter  |
|---|---|
| <p>Use this filter to view table report results by:</p> <ul style="list-style-type: none"><li><i>Academic Level</i></li><li><i>Admit Type</i> (default value)</li></ul> | <p>Use this filter to view report results by the following measures:</p> <ul style="list-style-type: none"><li><i>Admit Count</i></li><li><i>Applicant Count</i></li><li><i>Confirm Count</i></li><li><i>Enrollment Count</i></li><li><i>Prospect Count</i> (default value)</li></ul> |

The following table lists the columns and measures used in the Trend Analysis By Academic Year report.

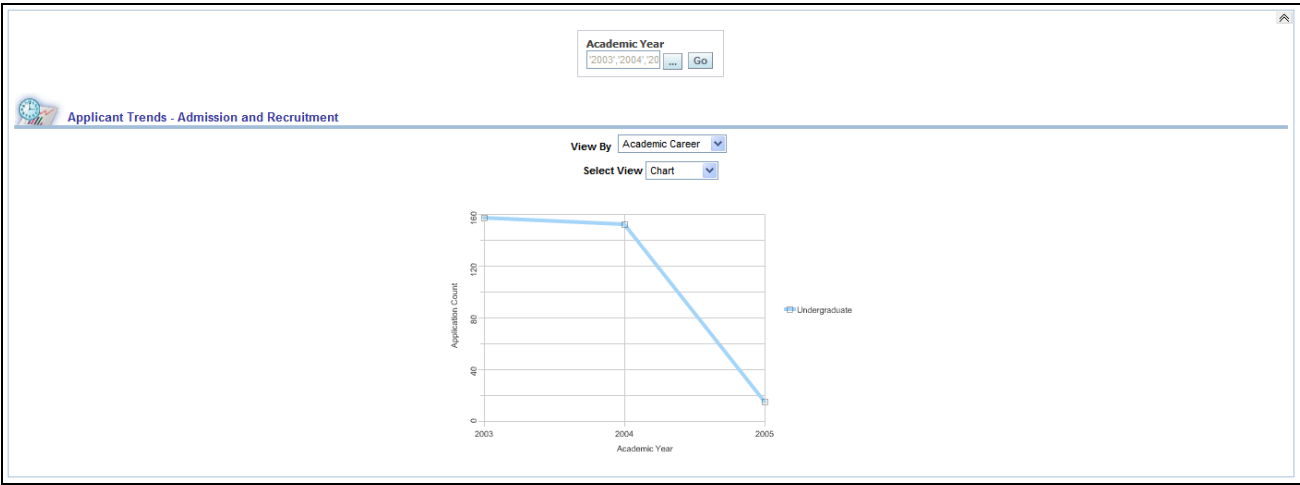
| Report Column / Measure Name | Report Column / Measure Origin         |
|------------------------------|--|
| Academic Career              | Academic Career (D_ACAD_CAR) Dimension |

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>    |
|-------------------------------------|--|
| Academic Level                      | Academic Level (D_ACAD_LVL) Dimension    |
| Academic Program                    | Academic Program (D_ACAD_PROG) Dimension |
| Admit Academic Year                 | Admit Term (D_TERM) Dimension            |
| Admit Type                          | Admit Type (D_ADMIT_TYPE) Dimension      |
| Institution                         | Institution (D_INSTITUTION) Dimension    |
| Admit Count                         | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Applicant Count                     | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Confirm Count                       | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Enrollment Count                    | Admission Funnel (F_ADM_FUNNEL) Fact     |
| Prospect Count                      | Admission Funnel (F_ADM_FUNNEL) Fact     |

## Applicant Trends - Admission and Recruitment Report

Access the Applicant Trends - Admission and Recruitment report, which enables you to evaluate the total number of applicants applying by year, academic career, academic program, residency, and so forth.





Applicant Trends - Admission and Recruitment report

| X,Y Axis Data  | Academic Year Filter  |
|--|---|
| <p>The Applicant Trends - Admission and Recruitment graph displays <i>Academic Year</i> data on the x-axis and <i>Application Count</i> by <i>Academic Career</i> data on the y-axis.</p> <p>You can also group the y-axis application count value by any of the following dimensions, depending on your selection in the second View By filter:</p> <ul style="list-style-type: none"><li>• <i>Academic Career</i> (default value)</li><li>• <i>Academic Level</i></li><li>• <i>Academic Program</i></li><li>• <i>Admit Type</i></li><li>• <i>Campus</i></li><li>• <i>Institution</i></li><li>• <i>Residency</i></li></ul> <p><b>Note.</b> You can click on graph data to review drill down data.</p> | <p>Use this filter to refine the report results to a specific year.</p> |

| <b>View By Filter</b>  | <b>Select View Filter</b>  |
|--|--|
| <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Academic Career</i> (default value)</li> <li>• <i>Academic Level</i></li> <li>• <i>Academic Program</i></li> <li>• <i>Admit Type</i></li> <li>• <i>Campus</i></li> <li>• <i>Institution</i></li> <li>• <i>Residency</i></li> </ul> | <p>Use this filter to:</p> <ul style="list-style-type: none"> <li>• view the data in line graph (chart) format</li> <li>• view the data in pivot table format</li> </ul> |

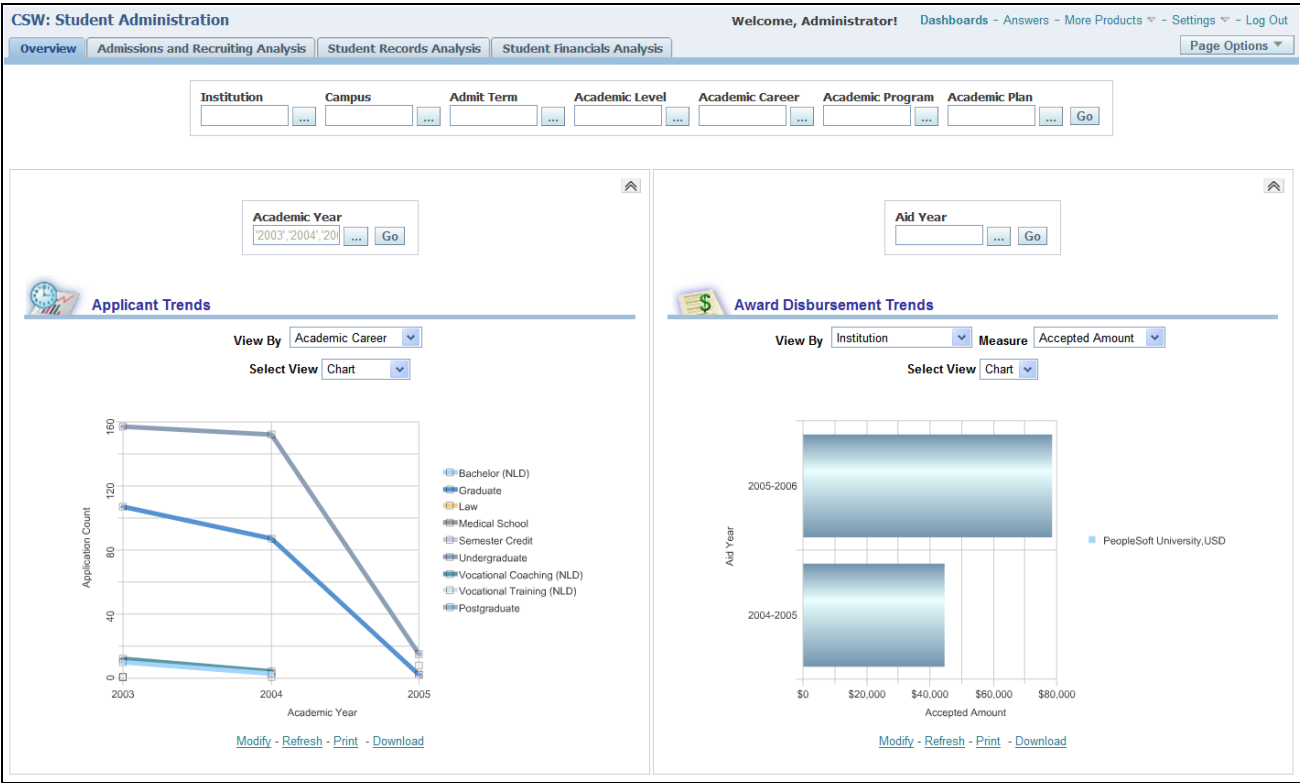
The following table lists the columns and measures used in the Applicant Trends - Admission and Recruitment report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>   |
|-------------------------------------|---|
| Academic Career                     | Academic Career (D_ACAD_CAR) Dimension  |
| Academic Level                      | Academic Level (D_ACAD_LVL) Dimension   |
| Academic Program                    | Academic Program (D_ACAD_PROG) Dimension  |
| Admit Academic Year                 | Admit Term (D_TERM) Dimension   |
| Admit Type                          | Admit Type (D_ADMIT_TYPE) Dimension   |
| Applicant Ethnic Group              | Person (D_PERSON) Dimension   |
| Applicant Gender Code               | Person (D_PERSON) Dimension   |
| Campus                              | Campus (D_CAMPUS) Dimension   |
| Citizenship Country                 | Person Attribute (D_PERSON_ATTR) Dimension  |
| Institution                         | Institution (D_INSTITUTION) Dimension   |
| Residency                           | Residency (D_RSDNCY) Dimension  |
| Applicant Count                     | Admission Funnel (F_ADM_FUNNEL) Fact  |
| % of Academic Year Total            | <p>(Applicant Count / Total Number of Applicants) * 100</p> <p><b>Note.</b> Applicant Count and Total Number of Applicants are constrained by a specific academic year.</p> |

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## Using the Student Administration - Overview Page

Access the Student Administration - Overview page (CSW Reports, CSW: Student Administration, Overview).

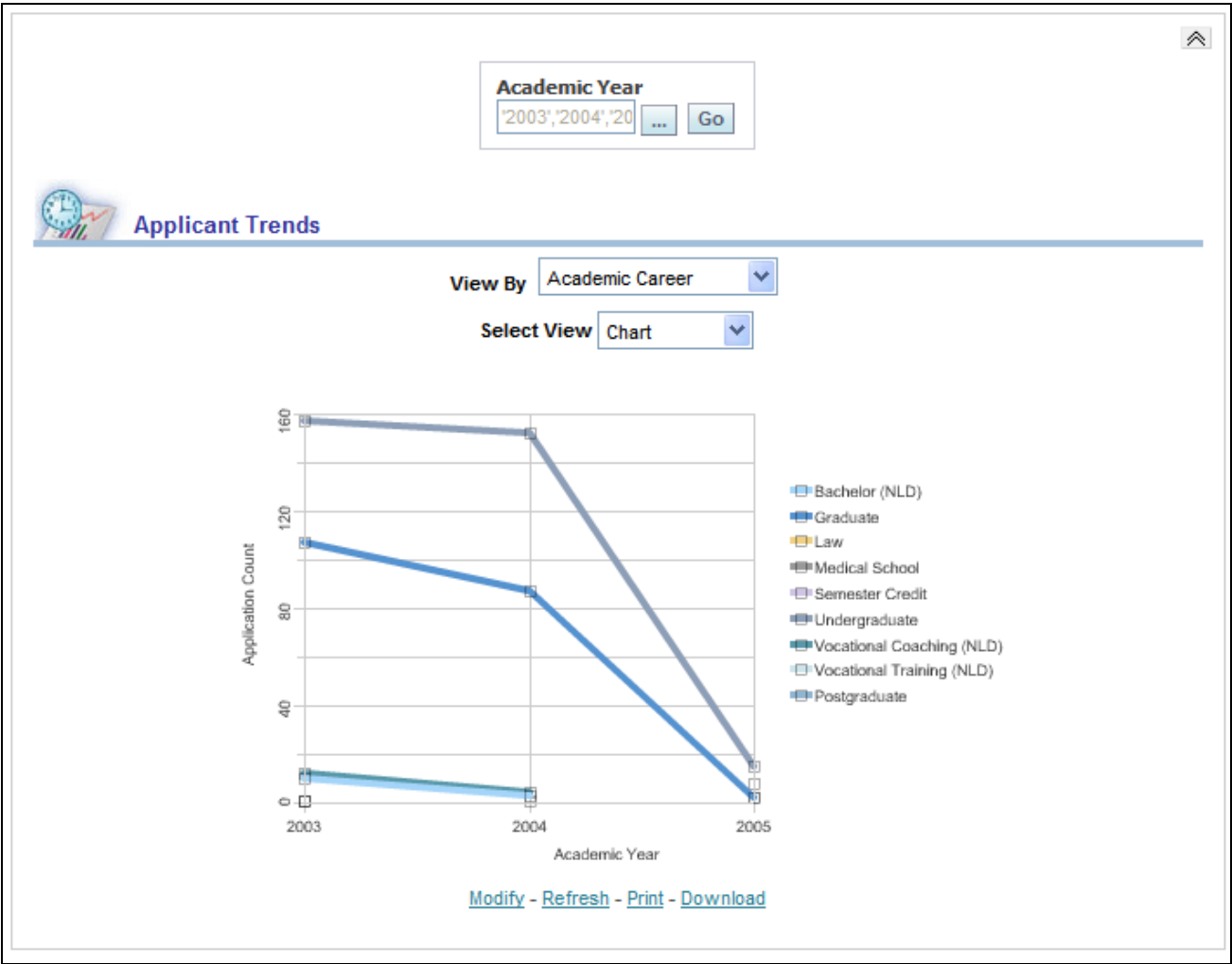


Student Administration - Overview page

| Usage   | Reports   | Dashboard Prompt   |
|---|---|--|
| The Student Administration page provides an overview of applicant, award disbursement, student retention, and student graduation trends for your institution. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>Applicant Trends report</li><li>Award Disbursement Trends report</li><li>Student Retention Trends report</li><li>Student Graduation Trends report</li></ul> | <p>Use the Overview page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Institution</li><li>Campus</li><li>Admit Term</li><li>Academic Level</li><li>Academic Career</li><li>Academic Program</li><li>Academic Plan</li></ul> |

Applicant Trends Report

Access the Applicant Trends report, which enables you to review applicant count trends by academic year.



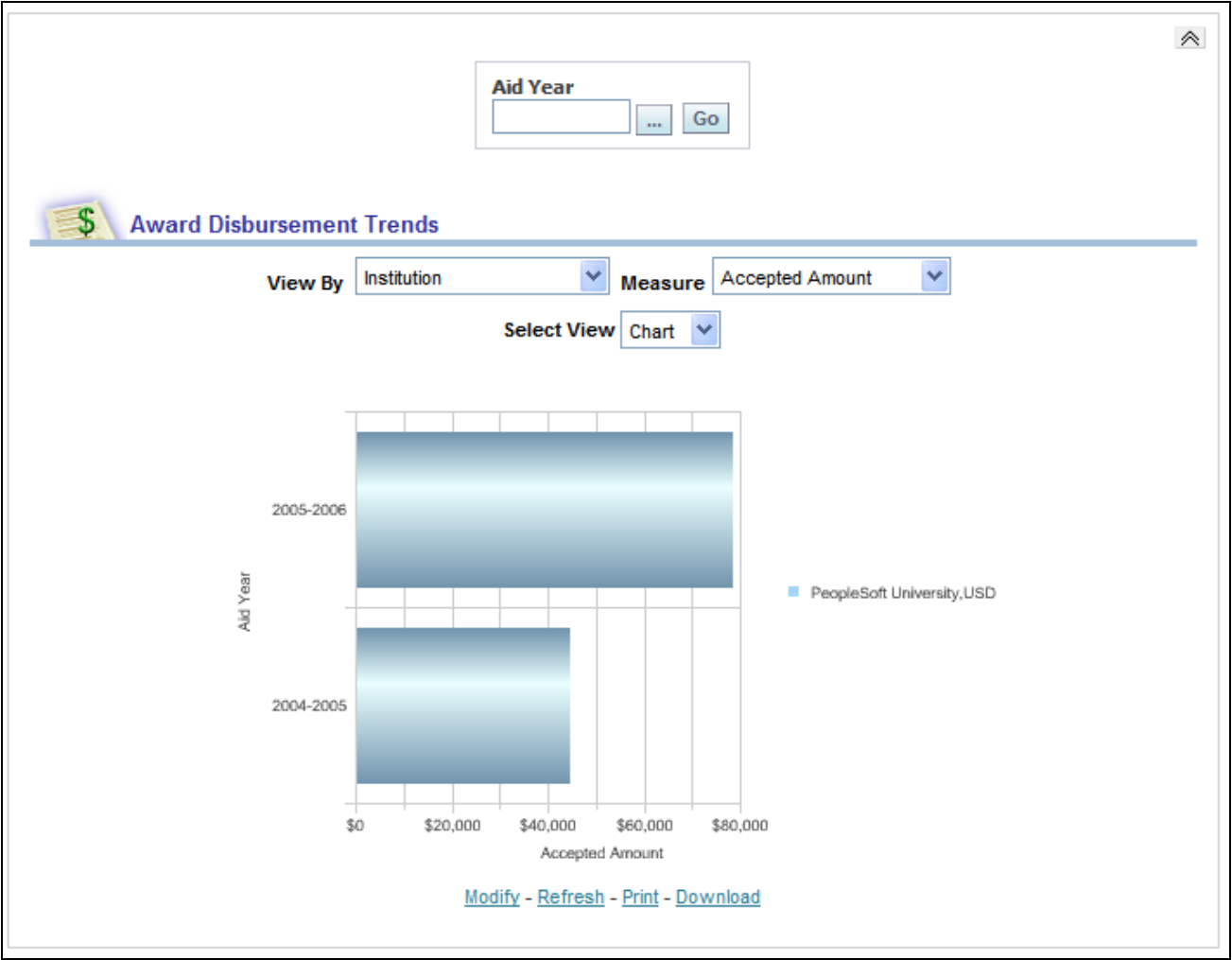
Applicant Trends Report

| <b><i>X,Y Axis Data</i></b>  | <b><i>Academic Year Filter</i></b>   |
|--|--|
| <p>The Applicant Trends graph displays <i>Academic Year</i> data on the x-axis and <i>Application Count</i> by <i>Academic Career</i> data on the y-axis.</p> <p>You can also group the y-axis application count value by any of the following dimensions, depending on your selection in the second View By filter:</p> <ul style="list-style-type: none"> <li>• <i>Academic Career</i> (default value)</li> <li>• <i>Academic Level</i></li> <li>• <i>Academic Program</i></li> <li>• <i>Admit Type</i></li> <li>• <i>Campus</i></li> <li>• <i>Institution</i></li> <li>• <i>Residency</i></li> </ul> <p><b>Note.</b> You can click on graph data to review drill down data.</p> | <p>Use this filter to refine the report results to a specific academic year.</p> |

| <b><i>View By Filter</i></b>   | <b><i>Select View Filter</i></b>   |
|--|--|
| <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Academic Career</i> (default value)</li> <li>• <i>Academic Level</i></li> <li>• <i>Academic Program</i></li> <li>• <i>Admit Type</i></li> <li>• <i>Campus</i></li> <li>• <i>Institution</i></li> <li>• <i>Residency</i></li> </ul> | <p>Use this filter to:</p> <ul style="list-style-type: none"> <li>• view the data in line graph (chart) format</li> <li>• view the data in pivot table format</li> </ul> |

## Award Disbursement Trends Report

Access the Award Disbursement Trends report, which enables you to analyze financial aid award disbursements trended by Aid Year.



Award Disbursement Trends Report

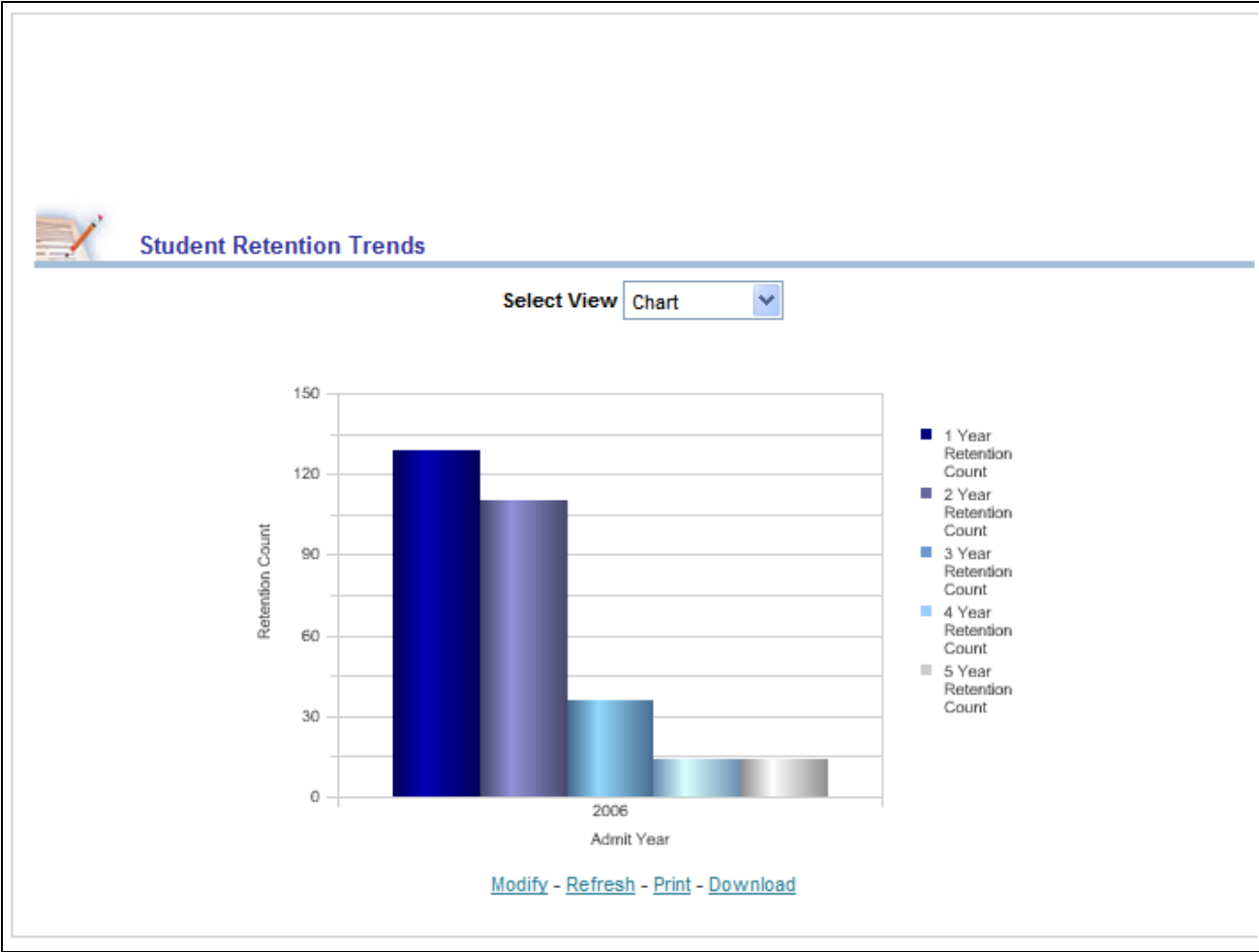
| <b><i>X,Y Axis Data</i></b>  | <b><i>Aid Year Filter</i></b>   | <b><i>View By Filter</i></b>   |
|--|---|--|
| <p>The Award Disbursement Trends bar chart displays <i>Acceptance Amount</i> by <i>Institution</i> data on the x-axis and <i>Aid Year</i> data on the y-axis.</p> <p>The y-axis can display any of the following measures, depending on your Measure filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Accepted Amount</i> (default)</li> <li>• <i>Authorized Amount</i></li> <li>• <i>Award Count</i></li> <li>• <i>Disbursed Amount</i></li> <li>• <i>Offered Amount</i></li> </ul> <p>You can also group the x-axis acceptance amount value by any of the following dimensions, depending on your selection in the second View By filter:</p> <ul style="list-style-type: none"> <li>• <i>Academic Career</i></li> <li>• <i>Ethnic Group</i></li> <li>• <i>Financial Aid Source</i></li> <li>• <i>Financial Aid Type</i></li> <li>• <i>Gender</i></li> <li>• <i>Institution</i> (default)</li> </ul> <p><b>Note.</b> You can click on graph data to review drill down data.</p> | <p>Use this filter to refine the report results to a specific financial aid year.</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Academic Career</i></li> <li>• <i>Ethnic Group</i></li> <li>• <i>Financial Aid Source</i></li> <li>• <i>Financial Aid Type</i></li> <li>• <i>Gender</i></li> <li>• <i>Institution</i> (default)</li> </ul> |

| <b><i>Measure Filter</i></b>  | <b><i>Select View Filter</i></b>  |
|---|---|
| <p>Use this filter to view report results by the following measures:</p> <ul style="list-style-type: none"> <li>• <i>Accepted Amount</i> (default)</li> <li>• <i>Authorized Amount</i></li> <li>• <i>Award Count</i></li> <li>• <i>Disbursed Amount</i></li> <li>• <i>Offered Amount</i></li> </ul> | <p>Use this filter to:</p> <ul style="list-style-type: none"> <li>• view the data in bar chart format</li> <li>• view the data in table format</li> </ul> |



## Student Retention Trends Report

Access the Student Retention Trends report, which enables you to analyze one to five year student retention counts by Academic Year.

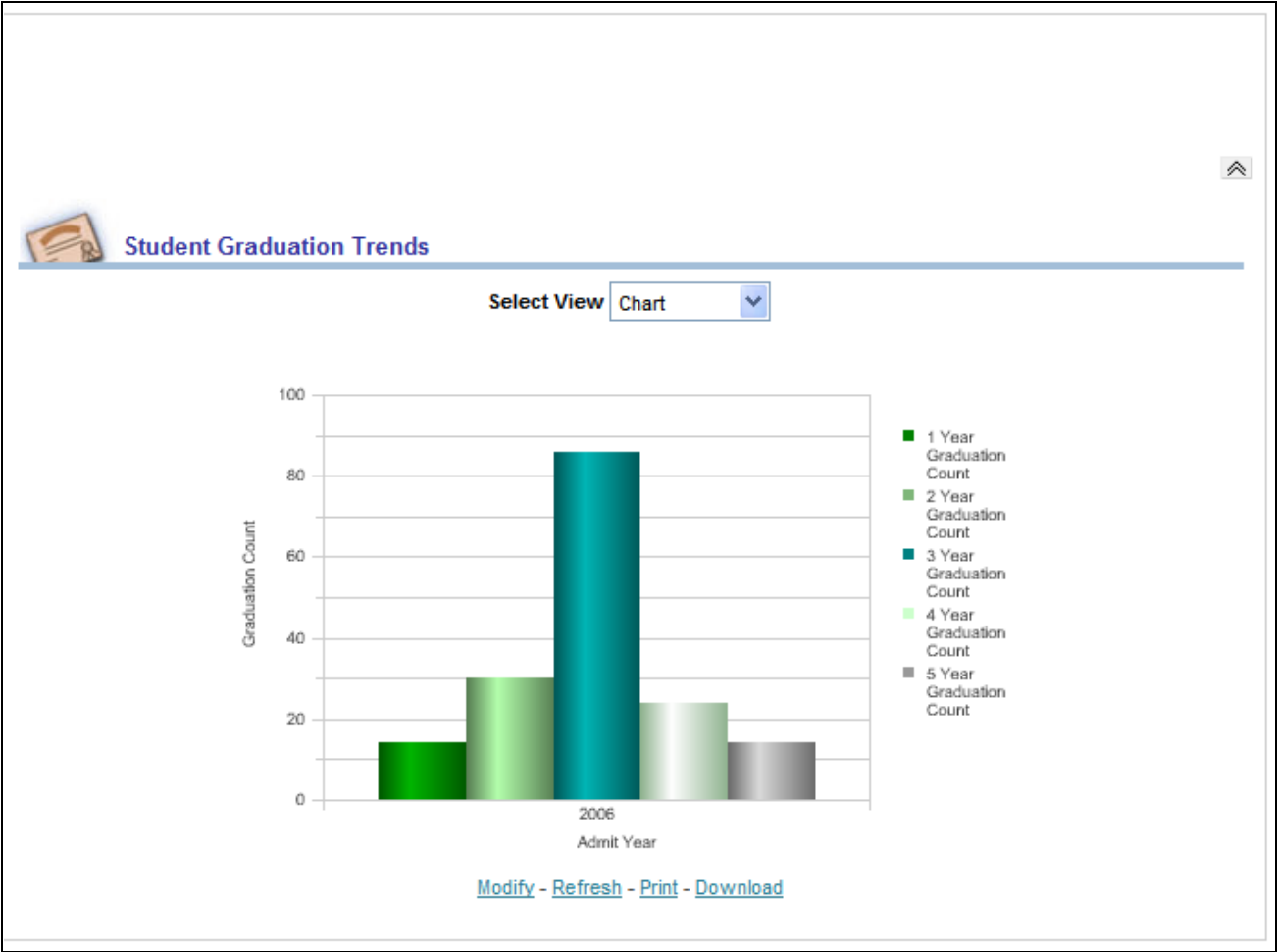


Student Retention Trends Report

|   |   |
|---|---|
| <b>X,Y Axis Data</b>  | <b>Admit Year Filter</b>  |
| The Student Retention Trends bar chart displays <i>Admit Year</i> data on the x-axis and <i>Retention Count</i> data on the y-axis. | Use this filter to refine the report results to a specific admit year.  |
| <b>Institution Filter</b>   | <b>Select View Filter</b>   |
| Use this filter to refine the report results to a specific institution.   | Use this filter to: <ul style="list-style-type: none"><li>view the data in bar chart format</li><li>view the data in pivot table format</li></ul> |

Student Graduation Trends Report

Access the Student Graduation Trends report, which enables you to analyze one to five year student graduation counts by Admit Year.



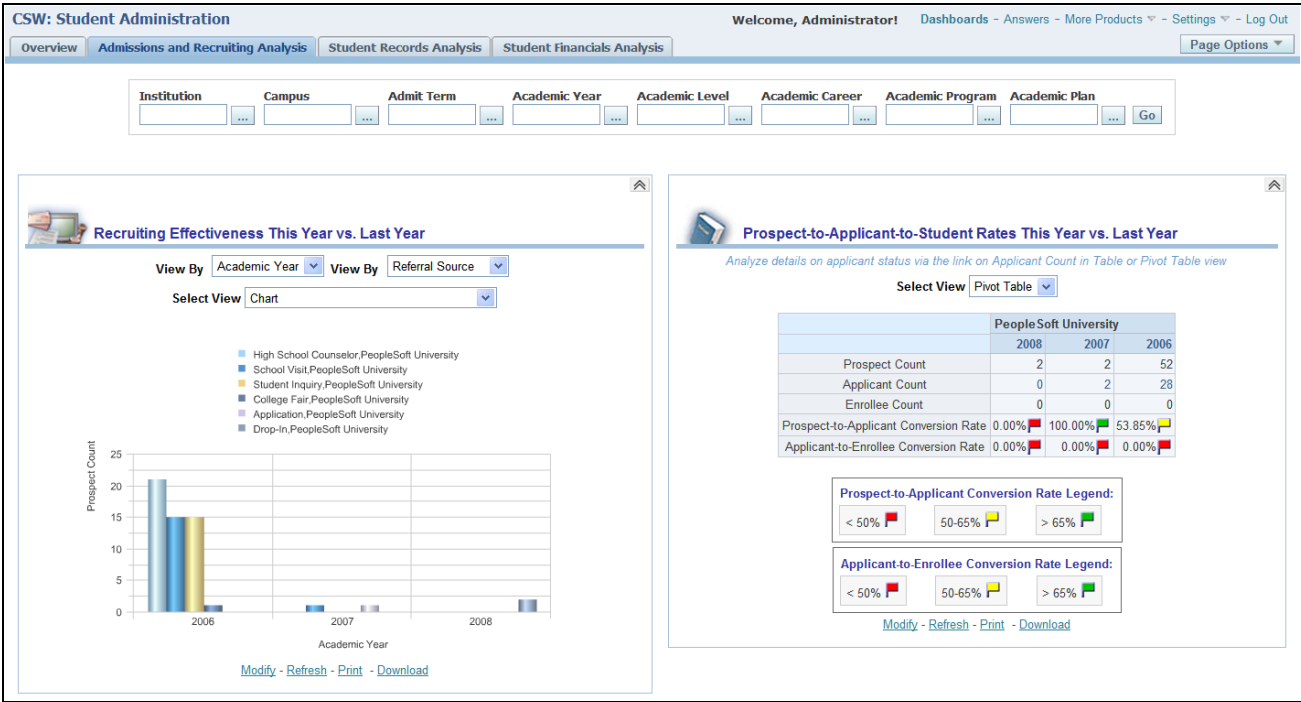
Student Graduation Trends Report

|   |   |
|---|---|
| <b>X,Y Axis Data</b>  | <b>Admit Year Filter</b>  |
| The Student Graduation Trends bar chart displays <i>Admit Year</i> data on the x-axis and <i>Graduation Count</i> data on the y-axis. | Use this filter to refine the report results to a specific admit year.  |
| <b>Institution Filter</b>   | <b>Select View Filter</b>   |
| Use this filter to refine the report results to a specific institution.   | Use this filter to: <ul style="list-style-type: none"><li>view the data in bar chart format</li><li>view the data in pivot table format</li></ul> |

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## Using the Student Administration Dashboard - Admissions and Recruiting Analysis Page

Access the Admissions and Recruiting Analysis page (CSW Reports, CSW: Student Administration, Admissions and Recruiting Analysis).

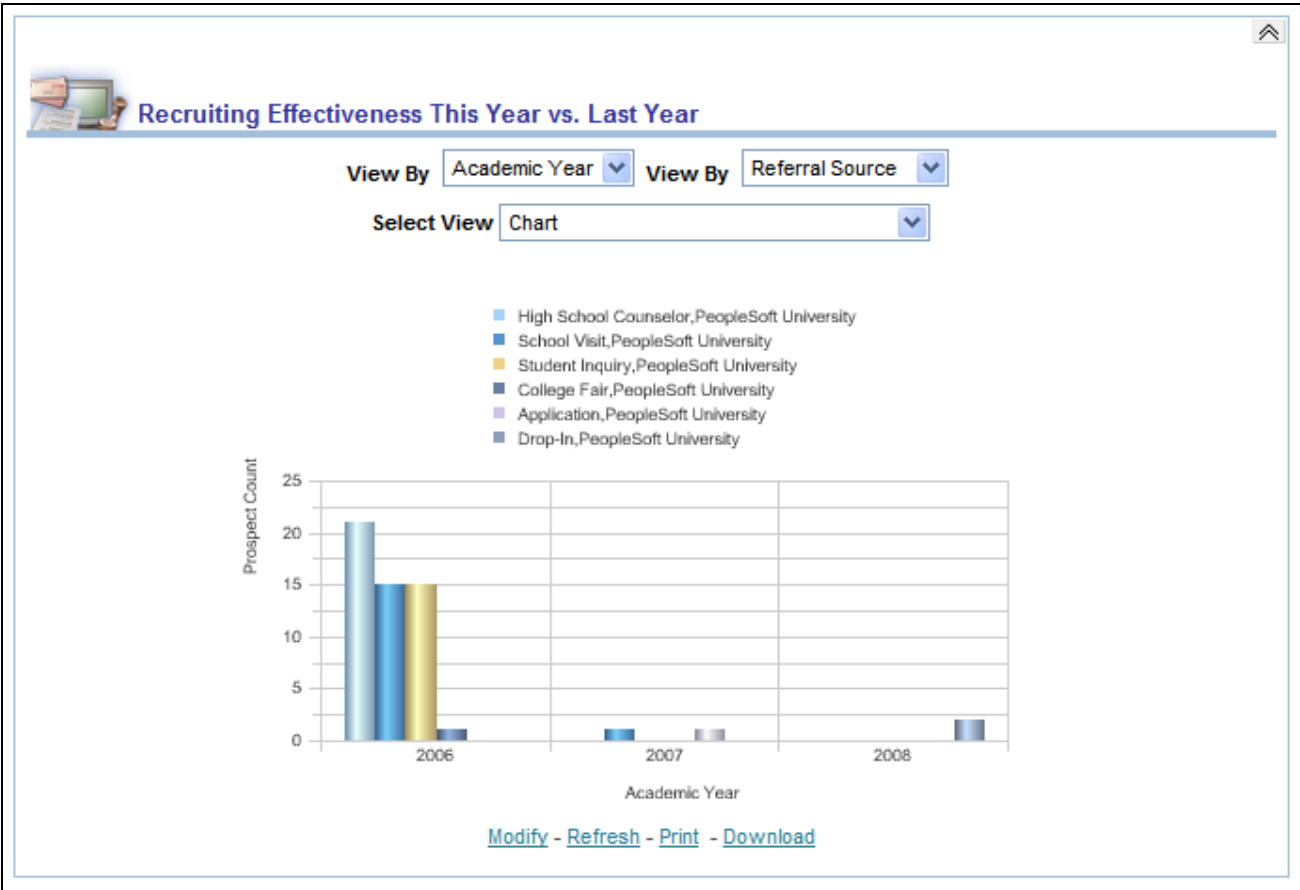


Admissions and Recruiting Analysis page

| Usage   | Reports   | Dashboard Prompt   |
|---|---|--|
| Provides an overview of recruiting and admissions effectiveness for your institution. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>Recruiting Effectiveness This Year vs. Last Year report</li><li>Prospect-to-Applicant-to-Student Rates This Year vs. Last Year report</li></ul> | <p>Use the Admissions and Recruiting Analysis page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Institution</li><li>Campus</li><li>Admit Term</li><li>Academic Year</li><li>Academic Level</li><li>Academic Career</li><li>Academic Program</li><li>Academic Plan</li></ul> |

Recruiting Effectiveness This Year vs. Last Year Report

Access the Recruiting Effectiveness This Year vs. Last Year report, which enables you to review recruiting metric trends.

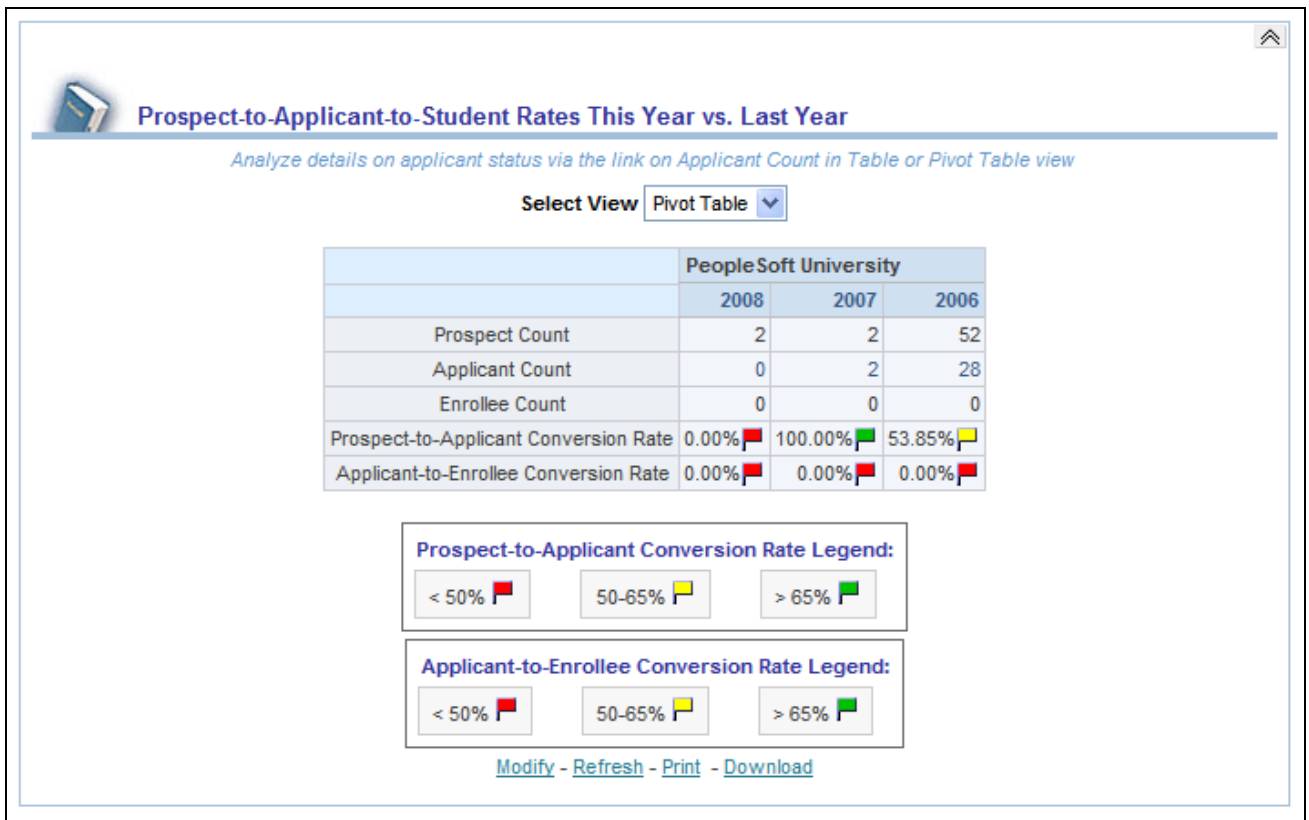


Recruiting Effectiveness This Year vs. Last Year Report

| <b><i>X,Y Axis Data</i></b>  | <b><i>View By Filters</i></b>   | <b><i>Select View Filter</i></b>  |
|--|---|---|
| <p>The Recruiting Effectiveness This Year vs. Last Year graph displays <i>Academic Year</i> data on the x-axis and <i>Prospect Count</i> by <i>Referral Source</i> data on the y-axis.</p> <p>The x-axis can display <i>Admit Term</i> data, depending on your selection in the first View by filter.</p> <p>You can also group the y-axis prospect count value by any of the following dimensions, depending on your selection in the second View By filter:</p> <ul style="list-style-type: none"> <li>• <i>Recruiting Center</i></li> <li>• <i>Recruiting Status</i></li> <li>• <i>Referral Source</i> (default)</li> </ul> <p><b>Note.</b> You can click on graph data to review drill down data for a particular admit term or academic year.</p> | <p>Use these filters to filter the report results by:</p> <ul style="list-style-type: none"> <li>• <i>Academic Year</i> (default value, available in the first filter only)</li> <li>• <i>Admit Term</i> (available in the first filter only)</li> <li>• <i>Recruiting Center</i> (available in the second filter only)</li> <li>• <i>Recruiting Status</i> (available in the second filter only)</li> <li>• <i>Referral Source</i> (default value, available in the second filter only)</li> </ul> | <p>Use this filter to:</p> <ul style="list-style-type: none"> <li>• view the data in bar chart format</li> <li>• present the data as a function of prospect count, year over year</li> <li>• present the data as a function of prospect count, percent of year total</li> </ul> |

## Prospect-to-Applicant-to-Student Rates This Year vs. Last Year Report

Access the Prospect-to-Applicant-to-Student Rates This Year vs. Last Year report, which enables you to analyze prospect, admit and enrollment counts and conversion rates.



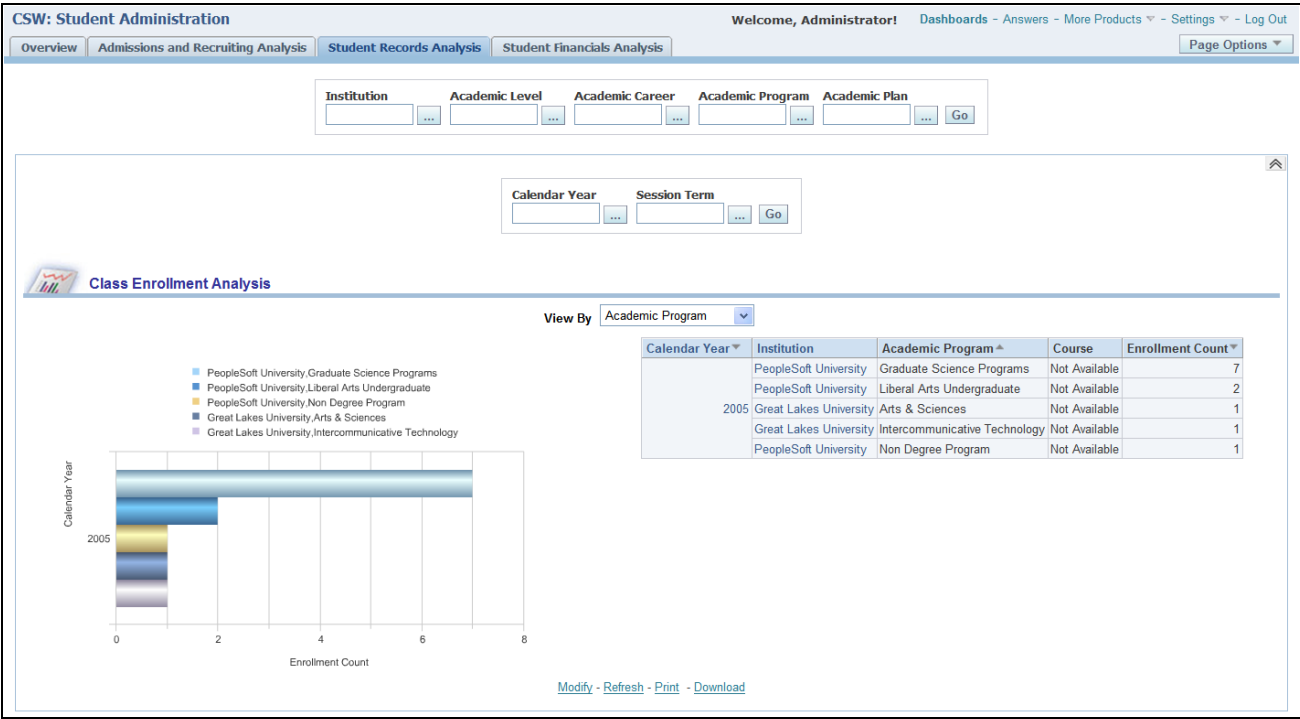
### Prospect-to-Applicant-to-Student Rates This Year vs. Last Year Report

Use the Select View filter to:

- view the data in bar chart format
- view the data in pivot table format
- view the data in table format

## Using the Student Administration Dashboard - Student Records Analysis Page

Access the Student Records Analysis page (CSW Reports, CSW: Student Administration, Student Records Analysis).



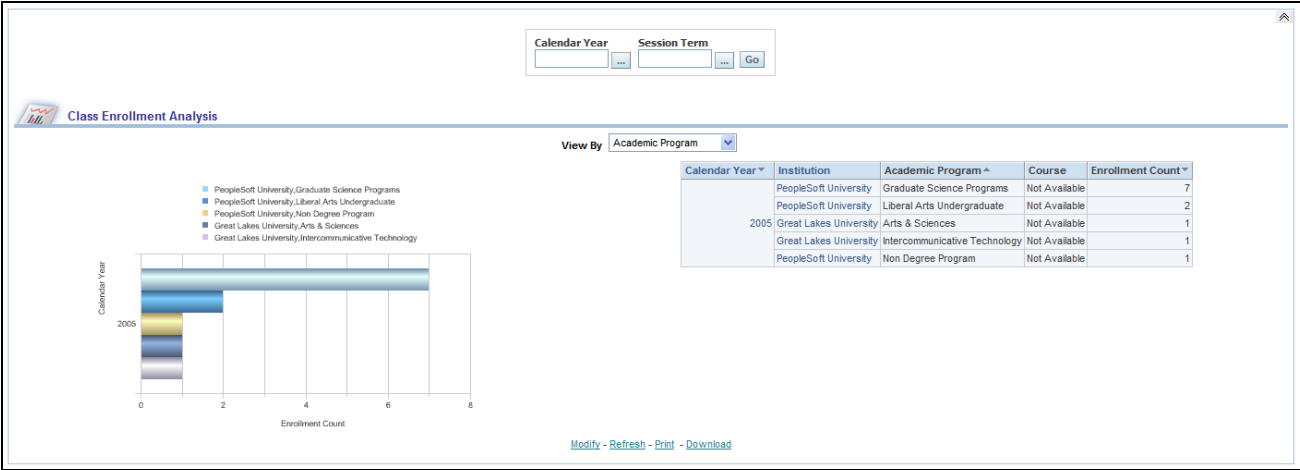
Student Records Analysis page

| Usage   | Reports  | Dashboard Prompt   |
|---|--|--|
| Provides you with an overview of class enrollment metrics and top student academic standings. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>Class Enrollment Analysis report</li><li>Top Student Academic Standings report</li></ul> | <p>Use the Student Records Analysis page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Institution</li><li>Academic Level</li><li>Academic Career</li><li>Academic Program</li><li>Academic Plan</li></ul> |

Class Enrollment Analysis Report

Access the Class Enrollment Analysis report, which enables you to analyze class enrollment counts by calendar year.





Class Enrollment Analysis Report

|   |   |
|---|---|
| <b>X,Y Axis Data</b>  | <b>Calendar Year Filter</b>   |
| <p>The Class Enrollment Analysis bar chart displays <i>Enrollment Count</i> by <i>Academic Program</i> data on the x-axis and <i>Calendar Year</i> data on the y-axis.</p> <p>You can also group the x-axis enrollment count value by any of the following dimensions, depending on your selection in the second View By filter:</p> <ul style="list-style-type: none"><li><i>Academic Career</i></li><li><i>Academic Group</i></li><li><i>Academic Organization</i></li><li><i>Academic Program</i> (default)</li><li><i>Student Cohort</i></li></ul> <p><b>Note.</b> You can click on graph data to review drill down data for a particular year and program.</p> | <p>Use this filter to refine the report results to a specific calendar year.</p>  |
| <b>Session Term Filter</b>  | <b>View By Filter</b>   |
| <p>Use this filter to refine the report results to a specific session term.</p>   | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li><i>Academic Career</i></li><li><i>Academic Group</i></li><li><i>Academic Organization</i></li><li><i>Academic Program</i> (default)</li><li><i>Student Cohort</i></li></ul> |


Top Student Academic Standings Report

Access the Top Student Academic Standings report, which enables you to analyze average GPA for a given academic year, academic term, institution, and academic plan.

Academic Year

Academic Term

Go

 **Top Student Academic Standings**

View By 

Academic Plan

| Academic Year | Academic Term | Institution           | Academic Plan  | Average GPA |
|---------------|---------------|-----------------------|----------------|-------------|
| 2005          | 2004 Fall     | PeopleSoft University | Chemistry (BS) | 0.00        |
|               |               | PeopleSoft University | Art (BFA)      | 0.00        |

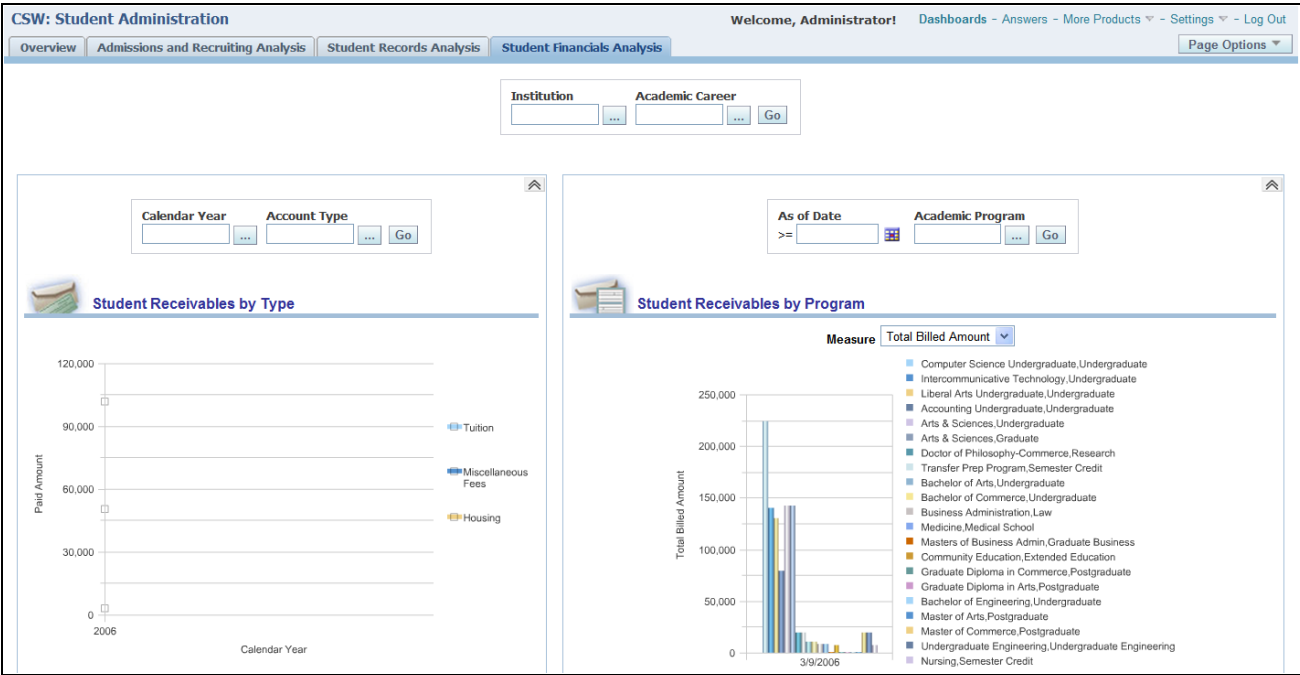
Modify - Refresh - Print - Download

Top Student Academic Standings Report

| Academic Year Filter  | Academic Term Filter  | View By Filter   |
|---|---|--|
| Use this filter to refine the report results to a specific academic year. | Use this filter to refine the report results to a specific academic term. | Use this filter to view report results by: <ul style="list-style-type: none"><li>Academic Level</li><li>Academic Plan (default)</li><li>Academic Program</li><li>Gender</li><li>Institution</li><li>Student Cohort</li></ul> |

Using the Student Administration Dashboard - Student Financials Analysis Page

Access the Student Financials Analysis page (CSW Reports, CSW: Student Administration, Student Financials Analysis).

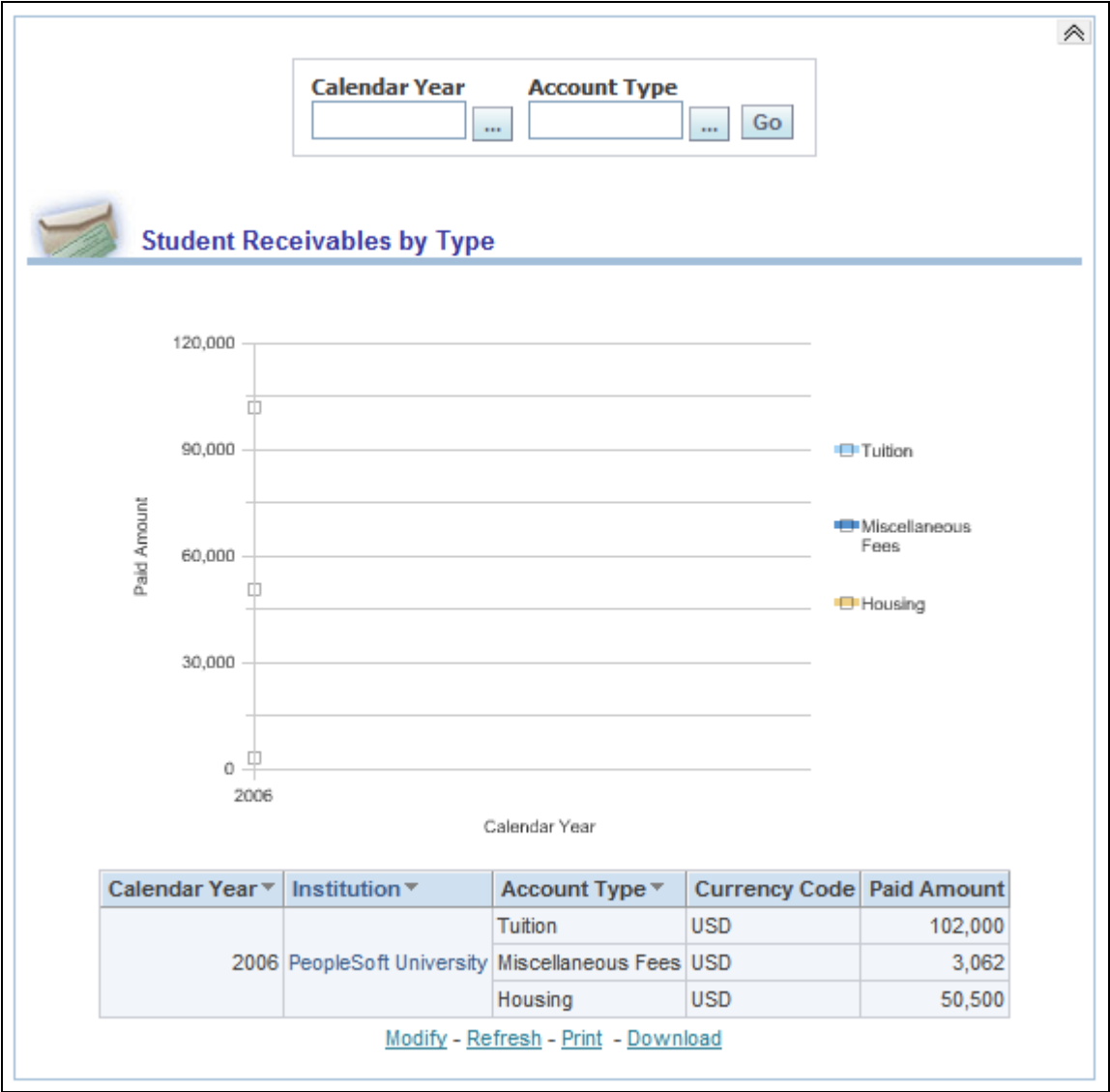


Student Financials Analysis page

| Usage  | Reports  | Dashboard Prompt  |
|--|--|---|
| Provides you with an overview of student receivables metrics for your institution. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Student Receivables by Type report</li><li>Student Receivables by Program report</li></ul> | <div>Use the Student Financials Analysis page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Institution</li><li>Academic Career</li></ul> |

## Student Receivables by Type Report

Access the Student Receivables by Type report, which enables you to analyze student receivables by type such as tuition, housing and miscellaneous fees.

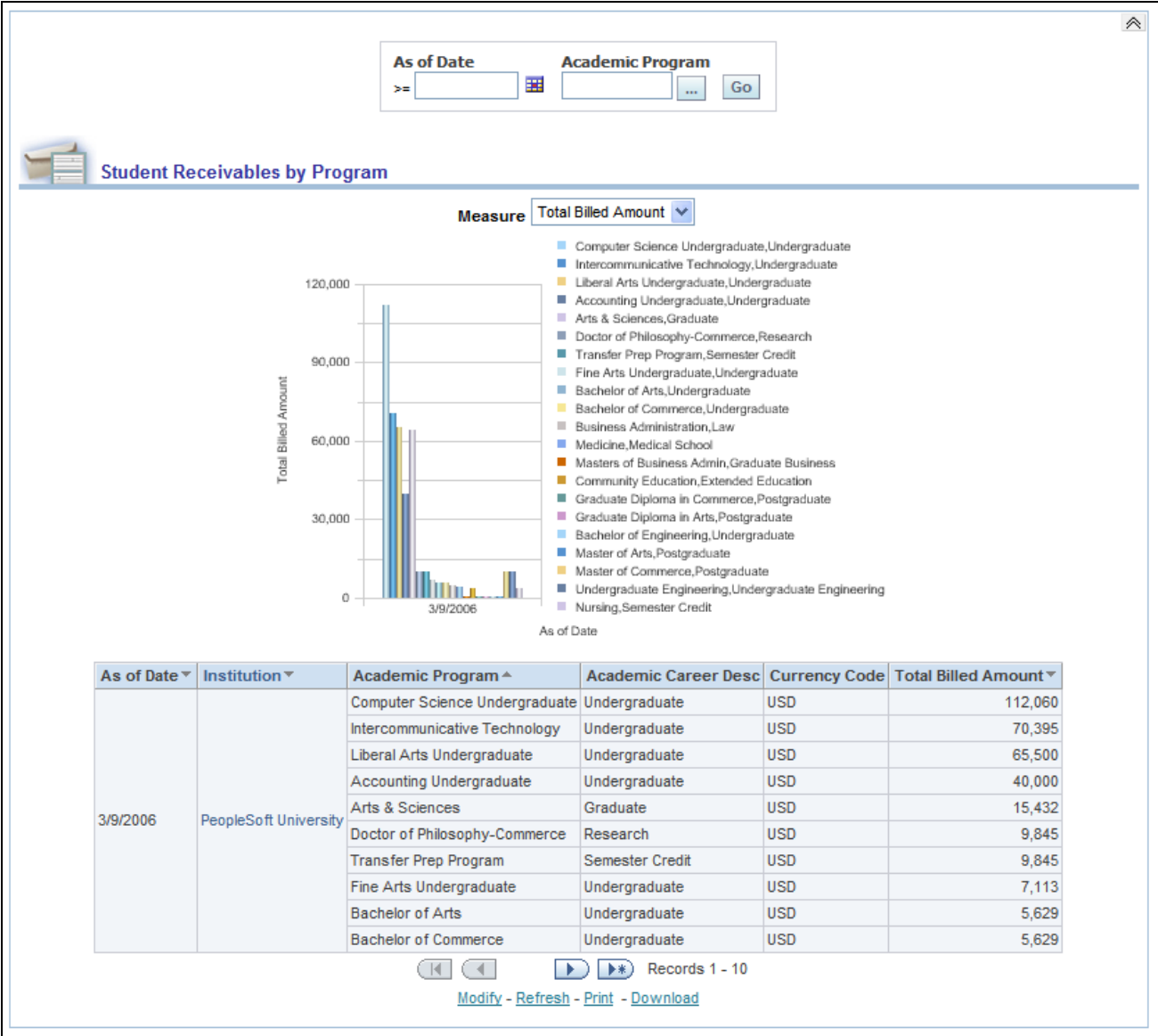


Student Receivables by Type Report

| X,Y Axis Data  | Calendar Year Filter  | Account Type Filter   |
|--|---|---|
| The Student Receivables by Type graph displays <i>Calendar Year</i> data on the x-axis and <i>Paid Amount</i> by <i>Account Type</i> data on the y-axis. | Use this filter to refine the report results to a specific calendar year. | Use this filter to refine the report results to a specific type of account. |

Student Receivables by Program Report

Access the Student Receivables by Program report, which enables you to analyze total billed and total paid amount for a student by academic program with a given as of date.



Student Receivables by Program Report

| X,Y Axis Data   | As of Date Filter   |
|---|---|
| <p>The Student Receivables by Program graph displays <i>As of Date</i> data on the x-axis and <i>Total Billed Amount</i> by <i>Academic Program</i> data on the y-axis.</p> <p>The y-axis can display any of the following measures, depending on your Measure filter selection:</p> <ul style="list-style-type: none"><li>• <i>Total Paid Amount</i></li><li>• <i>Total Billed Amount</i> (default)</li></ul> <p><b>Note.</b> You can click on graph data to review drill down data.</p> | <p>Use this filter to refine the report results to a specific as of date (returns data that have a date greater than or equal to the specified as of date).</p> |

| <i><b>Academic Program Filter</b></i>  | <i><b>Measure Filter</b></i>  |
|--|---|
| Use this filter to refine the report results to a specific academic program. | Use this filter to view report results by the following measures: <ul style="list-style-type: none"><li>• <i>Total Billed Amount</i> (default)</li><li>• <i>Total Paid Amount</i></li></ul> |

## Chapter 6

# Working with Delivered OBIEE Dashboards for the Financial Management Solutions (FMS) Warehouse

This chapter provides prerequisites, an overview of delivered OBIEE dashboards for the FMS Warehouse, and discusses:

- General Ledger Dashboard - Profit and Loss Overview Page
- General Ledger Dashboard - Actual vs Prior-Budget-Forecast Page
- General Ledger Dashboard - Financial Performance Trend Page

---

## Prerequisites

Before you use dashboards for the FMS Warehouse, you must implement:

- PeopleSoft Enterprise Financial Management Solutions (FMS) Warehouse.
- PeopleSoft Enterprise Financials Supply Chain Management (FSCM), which supplies transaction data to the FMS Warehouse.

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## Understanding Dashboards for the FMS Warehouse

The prebuilt dashboard and reports packaged for the FMS Warehouse provide you with an overview of key profit and loss results, and an early warning of a possible revenue shortfall, and cost of sales or expense overrun. You can manage expenses against the budget and forecast, and know immediately if there is an overspending potential.

PeopleSoft provides dashboards that map to the following FMS Warehouse data marts:

- Enterprise Service Automation
- General Ledger
- Profitability
- Payables
- Receivables

## Guided Navigations

Guided navigations assist users in the exploration of results that appear on dashboards. The Profit and Loss Overview page in the FMS: General Ledger dashboard contains a Guided Navigation section that appears conditionally based on certain COGS, expense, and revenue key performance indicators (KPIs). When the system detects that one of these KPIs has reached its predefined threshold, a link appears in the Guided Navigation section to guide you to a summary report for further investigation.

This table lists the alert names, threshold descriptions, and guided navigation target pages for the alerts that are delivered with the FMS: General Ledger dashboard:

| <b>Guided Navigation Name</b> | <b>Threshold Description</b>  | <b>Guided Navigation Target Page</b> |
|-------------------------------|---|--------------------------------------|
| Revenue Alert                 | Revenue is at risk of missing the budget or forecast, based on this calculation:<br><br>(revenue ÷ budget ≤ 0.95) and<br>((period end date – system date) ≤ 10) | Revenue Summary report               |
| Expense Alert                 | Some business units or departments are at risk of an expense overrun, based on this calculation:<br><br>(expenses ÷ budget ≥ 0.60)                              | Expense Summary report               |
| COGS Alert                    | Cost of goods sold is at risk of exceeding the budget or forecast, based on this calculation:<br><br>(COGS ÷ budget ≥ 0.90)                                     | COGS Summary report                  |

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, "Using Oracle BI Interactive Dashboards," Adding Content to an Oracle BI Interactive Dashboard.

## Delivered Security Groups

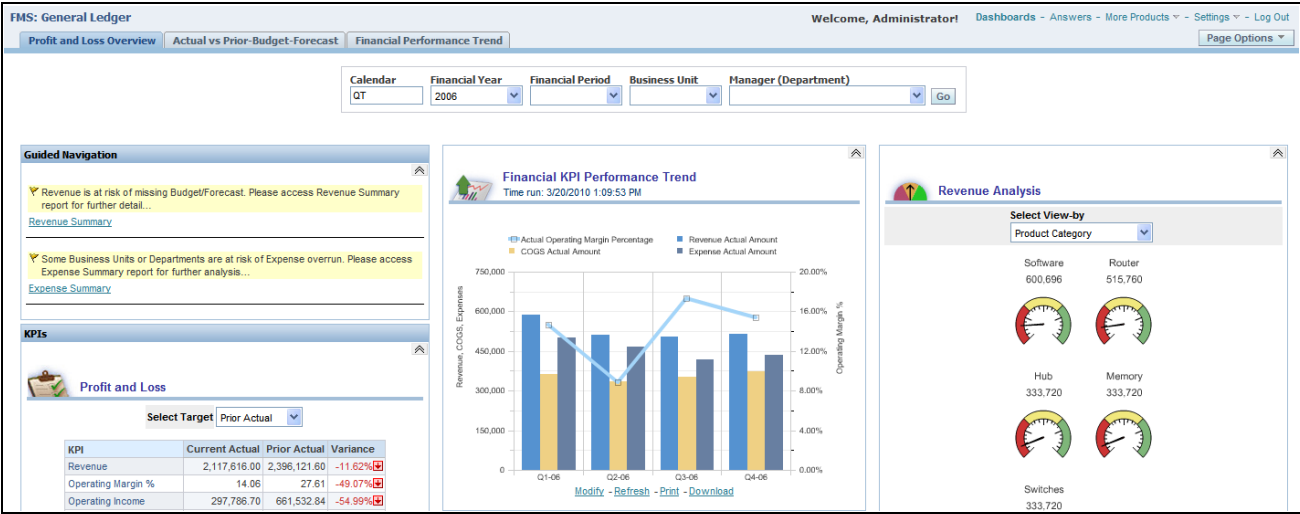
This list contains the financials-oriented Oracle BI Server and Oracle Presentation Catalog security groups provided for the FMS Warehouse:

- Accounts Payable Manager
- Accounts Receivable Manager
- Costing Manager
- Finance Manager
- Project Manager
- Property Manager



# Using the General Ledger Dashboard - Profit and Loss Overview Page

Access the Profit and Loss Overview page (FMS: General Ledger, Profit and Loss Overview).

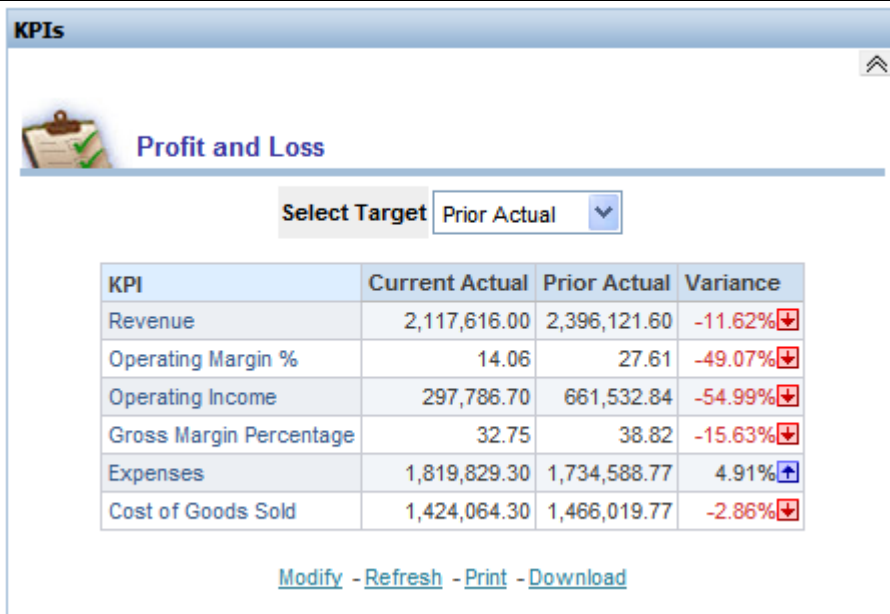


Profit and Loss Overview page

| Usage   | Reports  | Dashboard Prompt   |
|---|--|--|
| Provides an analysis of general ledger financial metrics referencing the GL & Profitability data mart. Metrics include revenue, profit & loss, and financial KPI's. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>KPIs - Profit and Loss report</li><li>Financial KPI Performance Trend report</li><li>Revenue Analysis report</li><li>Top Orders - Revenue Pipeline report</li><li>Profit &amp; Loss Statement report</li></ul> | <p>Use the Profit and Loss Overview page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Calendar</li><li>Financial Year</li><li>Financial Period</li><li>Business Unit</li><li>Manager (Department)</li></ul> |

## KPIs - Profit and Loss Report

Access the KPIs - Profit and Loss report, which enables you to analyze Operating Margin %, Operating Income, Gross Margin %, Expenses and Cost of Goods Sold.



**KPIs**

**Profit and Loss**

Select Target: Prior Actual

| KPI                     | Current Actual | Prior Actual | Variance |
|-------------------------|----------------|--------------|----------|
| Revenue                 | 2,117,616.00   | 2,396,121.60 | -11.62%↓ |
| Operating Margin %      | 14.06          | 27.61        | -49.07%↓ |
| Operating Income        | 297,786.70     | 661,532.84   | -54.99%↓ |
| Gross Margin Percentage | 32.75          | 38.82        | -15.63%↓ |
| Expenses                | 1,819,829.30   | 1,734,588.77 | 4.91%↑   |
| Cost of Goods Sold      | 1,424,064.30   | 1,466,019.77 | -2.86%↓  |

[Modify](#) - [Refresh](#) - [Print](#) - [Download](#)

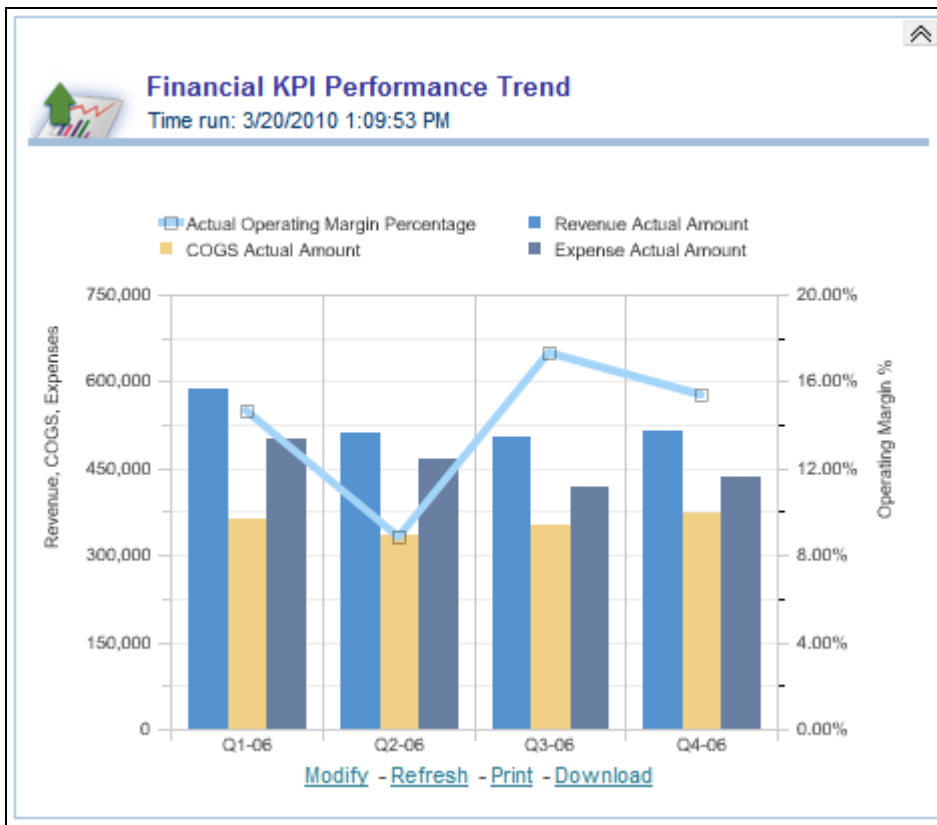
### KPIs - Profit and Loss Report

Use the Select Target filter to filter the report results by:

- *Budget*
- *Forecast*
- *Prior Actual* (default)

## Financial KPI Performance Trend Report

Access the Financial KPI Performance Trend report, which enables you to analyze financial performance trends such as operating margin %, Revenue, Expense and Cost of Goods Sold amounts.

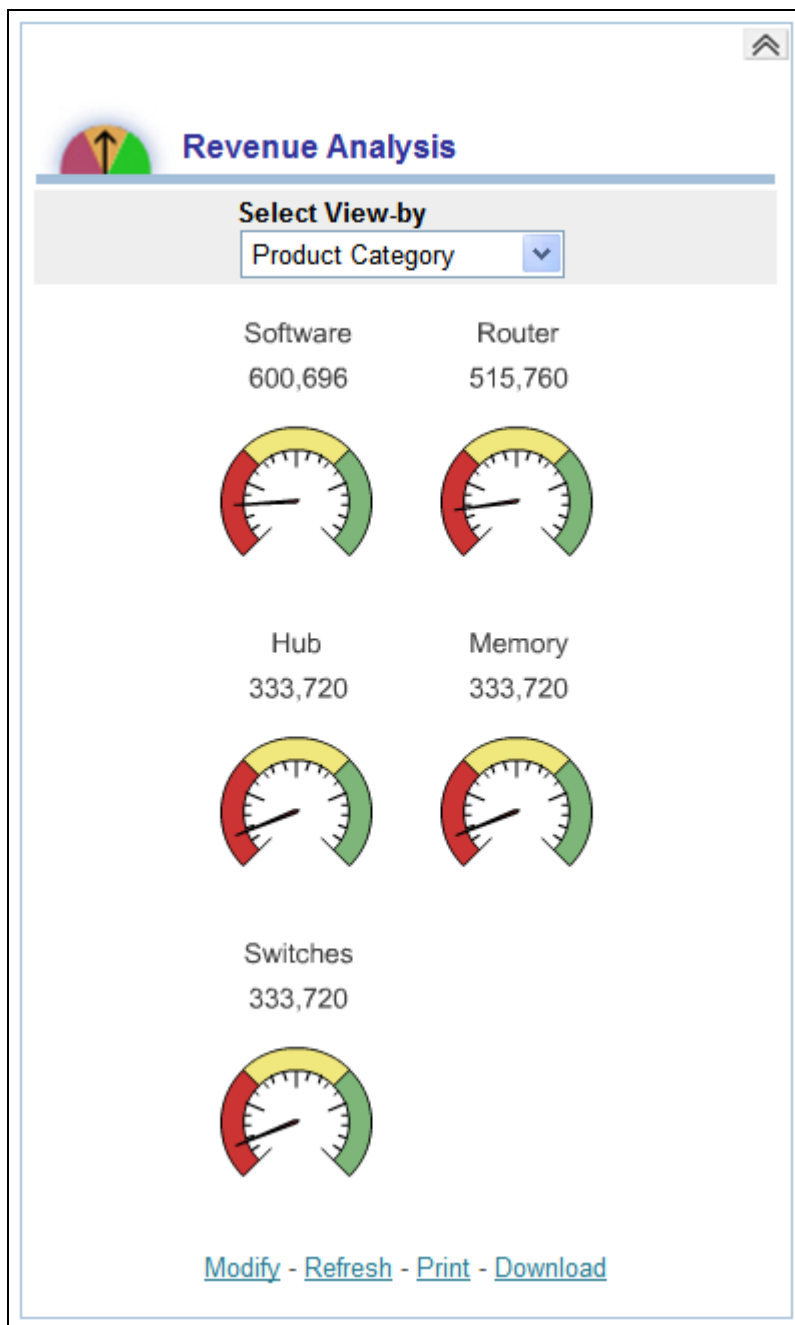


Financial KPI Performance Trend Report

The Financial KPI Performance Trend line graph displays *Quarterly* data on the x-axis and *Revenue*, *COGS*, *Expenses*, or alternatively, *Operating Margin Percent* data on the y-axis.

## Revenue Analysis Report

Access the Revenue Analysis report, which enables you to analyze revenue amount by product, business unit, department, project and period.



### Revenue Analysis Report

Use the Select View By filter to view report results by:

- *Business Unit*
- *Manager (Department)*
- *Product Category* (default)
- *Project*
- *Period*

## Top Orders - Revenue Pipeline Report

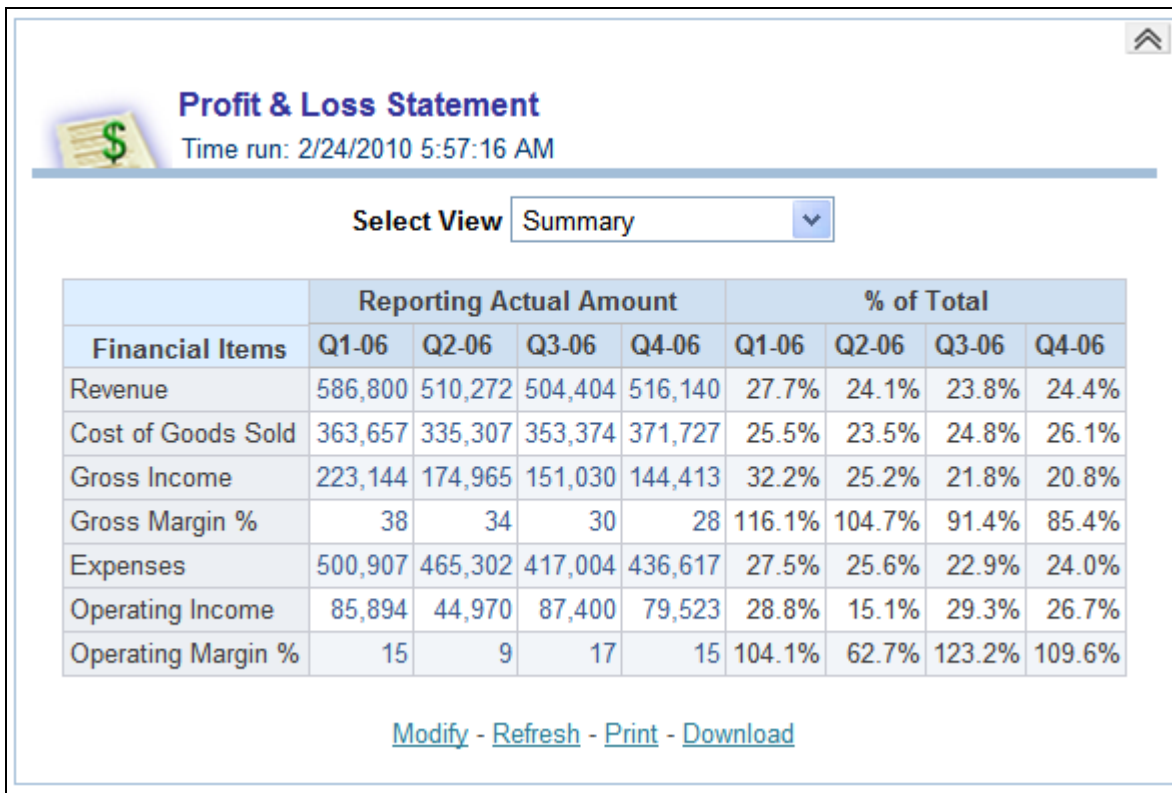
Access the Top Orders - Revenue Pipeline report, which enables you to analyze revenue metrics by customer.



Top Orders - Revenue Pipeline Report

## Profit & Loss Statement Report

Access the Profit & Loss Statement report, which enables you to analyze profit and loss metrics by business unit, department, product, and so forth.



The screenshot shows a dashboard titled "Profit & Loss Statement" with a time run of "2/24/2010 5:57:16 AM". Below the title is a "Select View" dropdown menu set to "Summary". The main content is a table with two main sections: "Reporting Actual Amount" and "% of Total", each with four columns for quarters Q1-06, Q2-06, Q3-06, and Q4-06. The rows list various financial items including Revenue, Cost of Goods Sold, Gross Income, Gross Margin %, Expenses, Operating Income, and Operating Margin %.

| Financial Items    | Reporting Actual Amount |         |         |         | % of Total |        |        |        |
|--------------------|-------------------------|---------|---------|---------|------------|--------|--------|--------|
|                    | Q1-06                   | Q2-06   | Q3-06   | Q4-06   | Q1-06      | Q2-06  | Q3-06  | Q4-06  |
| Revenue            | 586,800                 | 510,272 | 504,404 | 516,140 | 27.7%      | 24.1%  | 23.8%  | 24.4%  |
| Cost of Goods Sold | 363,657                 | 335,307 | 353,374 | 371,727 | 25.5%      | 23.5%  | 24.8%  | 26.1%  |
| Gross Income       | 223,144                 | 174,965 | 151,030 | 144,413 | 32.2%      | 25.2%  | 21.8%  | 20.8%  |
| Gross Margin %     | 38                      | 34      | 30      | 28      | 116.1%     | 104.7% | 91.4%  | 85.4%  |
| Expenses           | 500,907                 | 465,302 | 417,004 | 436,617 | 27.5%      | 25.6%  | 22.9%  | 24.0%  |
| Operating Income   | 85,894                  | 44,970  | 87,400  | 79,523  | 28.8%      | 15.1%  | 29.3%  | 26.7%  |
| Operating Margin % | 15                      | 9       | 17      | 15      | 104.1%     | 62.7%  | 123.2% | 109.6% |

At the bottom of the table, there are links: [Modify](#) - [Refresh](#) - [Print](#) - [Download](#).

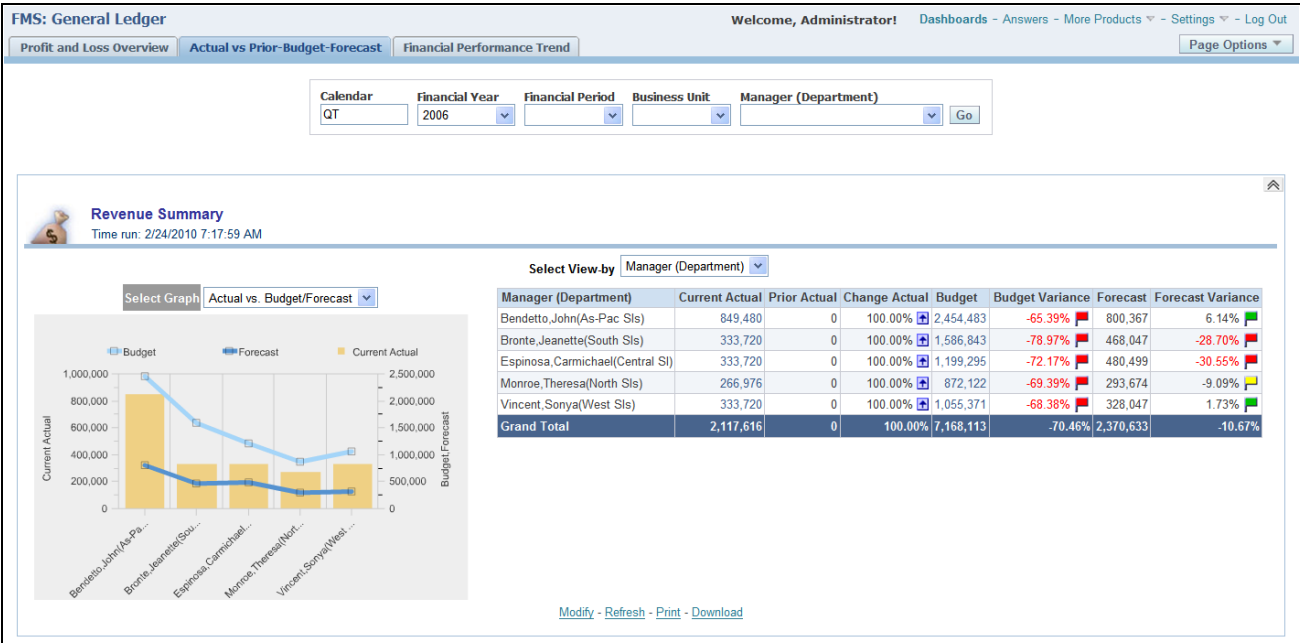
### Profit & Loss Statement Report

Use the Select View filter to view report results by:

- *Business Unit*
- *Manager (Department)*
- *Product Category*
- *Summary* (default)

## Using the General Ledger Dashboard - Actual vs Prior-Budget-Forecast Page

Access the Actual vs Prior-Budget-Forecast page (FMS: General Ledger, Actual vs Prior-Budget-Forecast).

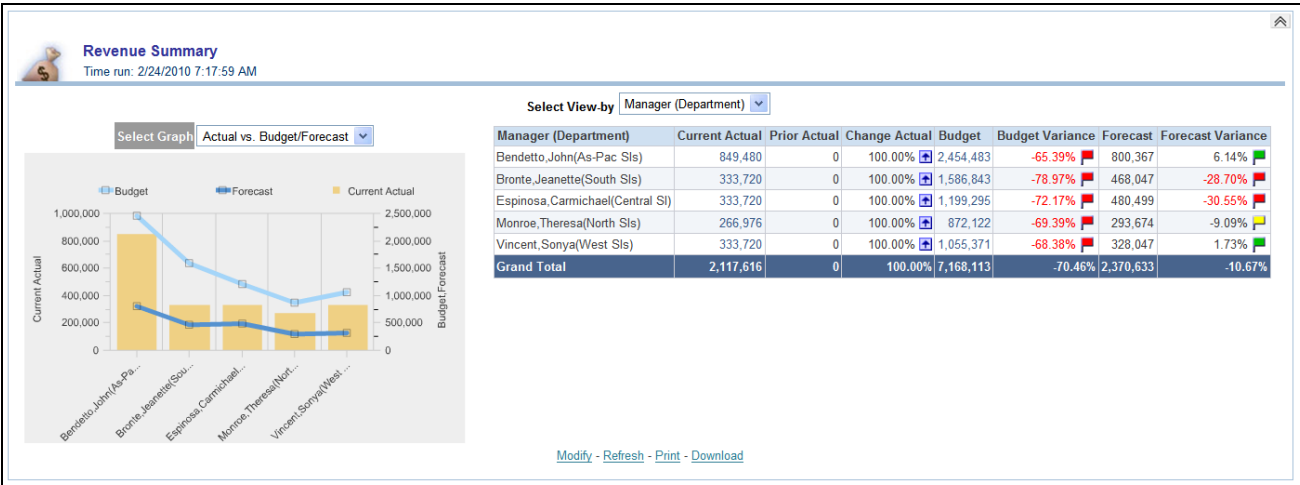


Actual vs Prior-Budget-Forecast page

| Usage  | Reports   | Dashboard Prompt  |
|--|---|---|
| Provides you with a detailed analysis of revenue, expense, and cost of goods sold metrics for your organization. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Revenue Summary report</li><li>COGS Summary report</li><li>Expense Summary report</li></ul> | <div>Use the Actual vs Prior-Budget-Forecast page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Calendar</li><li>Financial Year</li><li>Financial Period</li><li>Business Unit</li><li>Manager (Department)</li></ul> |

Revenue Summary Report

Access the Revenue Summary report, which enables you to analyze revenue by business unit, department, and account as well as comparing actual to budget revenue amounts.



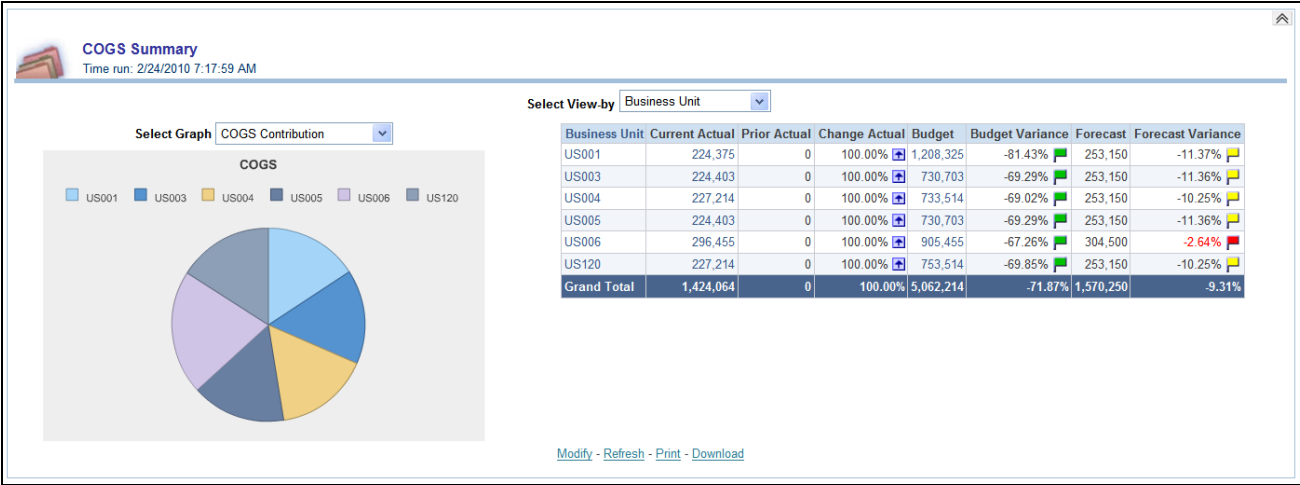
Revenue Summary Report

|   |  |
|---|--|
| <p><b>Select Graph - Actual vs. Budget/Forecast (Default)</b></p> <p>The Actual vs. Budget/Forecast graph displays <i>Manager (Department)</i> data on the x-axis and <i>Current Actual (revenue)</i> and <i>Budget, Forecast (revenue)</i> data on the y-axis.</p> | <p><b>Select Graph - Revenue Contribution</b></p> <p>The Revenue Contribution pie chart displays revenue data grouped by <i>Manager (Department)</i>.</p>  |
| <p><b>Select Graph - Variance Analysis</b></p> <p>The Variance Analysis line graph displays <i>Manager (Department)</i> data on the x-axis and <i>(Revenue) Variance Percentage</i> data on the y-axis.</p>   | <p><b>Select View By</b></p> <p>Use this filter to view results in the table by:</p> <ul style="list-style-type: none"><li><i>Business Unit</i></li><li><i>Manager (Department)</i> (default)</li><li><i>Account Description</i></li></ul> |

COGS (Cost of Goods Sold) Summary Report

Access the COGS (Cost of Goods Sold) Summary report, which summarizes cost of goods sold by business unit, department, and account as well as comparing actual to budget amounts.





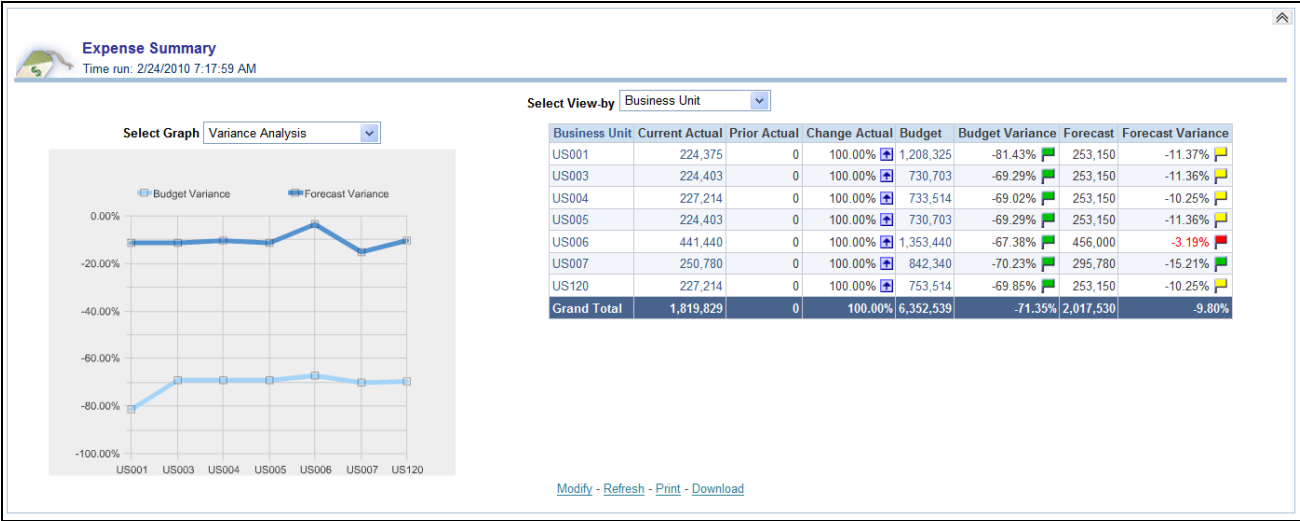
COGS Summary Report

|  |   |
|--|---|
| <b>Select Graph - COGS Contribution (Default)</b>  | <b>Select Graph - Actual vs. Budget/Forecast</b>  |
| The COGS Contribution pie chart displays cost of goods sold data grouped by <i>Business Unit</i> . | The Actual vs. Budget/Forecast graph displays <i>Business Unit</i> data on the x-axis and <i>Current Actual (COGS)</i> and <i>Budget, Forecast (COGS)</i> data on the y-axis. |

|   |  |
|---|--|
| <b>Select Graph - Variance Analysis</b>   | <b>Select View By</b>  |
| The Variance Analysis line graph displays <i>Business Unit</i> data on the x-axis and <i>COGS Variance Percentage</i> data on the y-axis. | Use this filter to view results in the table by: <ul style="list-style-type: none"><li><i>Business Unit</i></li><li><i>Manager (Department)</i> (default)</li><li><i>Account Description</i></li></ul> |

Expense Summary Report

Access the Expense Summary report, which summarizes expenses by business unit, department, and account as well as comparing actual to budget expense amounts.

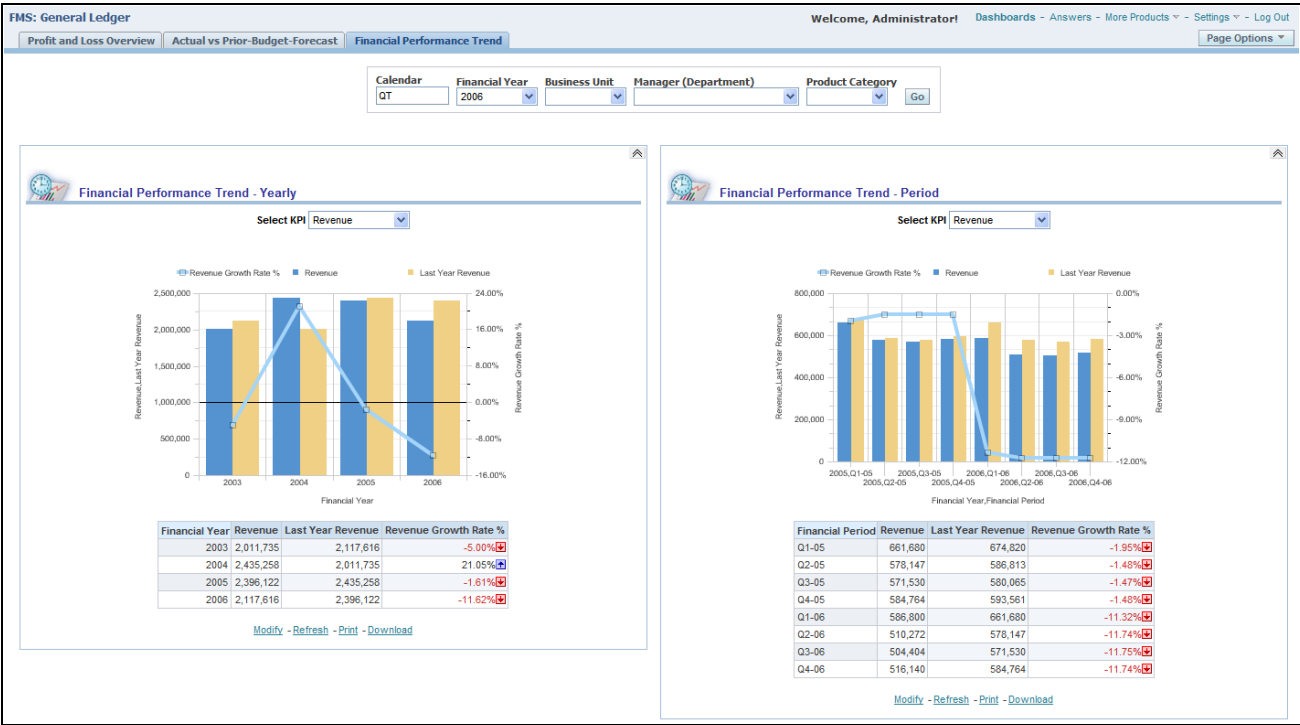


Expense Summary Report

|   |  |
|---|--|
| <b>Select Graph - Variance Analysis</b>   | <b>Select Graph - Expense Contribution (Default)</b>   |
| The Variance Analysis line graph displays <i>Business Unit</i> data on the x-axis and <i>Expense Variance Percentage</i> data on the y-axis.  | The Expense Contribution pie chart displays expense data grouped by <i>Business Unit</i> .   |
| <b>Select Graph - Actual vs. Budget/Forecast</b>  | <b>Select View By Filter</b>   |
| The Actual vs. Budget/Forecast graph displays <i>Business Unit</i> data on the x-axis and <i>Current Actual (expense)</i> and <i>Budget, Forecast (expense)</i> data on the y-axis. | Use this filter to view results in the table by: <ul style="list-style-type: none"><li><i>Business Unit</i></li><li><i>Manager (Department)</i> (default)</li><li><i>Account Description</i></li></ul> |

# Using the General Ledger Dashboard - Financial Performance Trend Page

Access the Financial Performance Trend page (FMS: General Ledger, Financial Performance Trend).

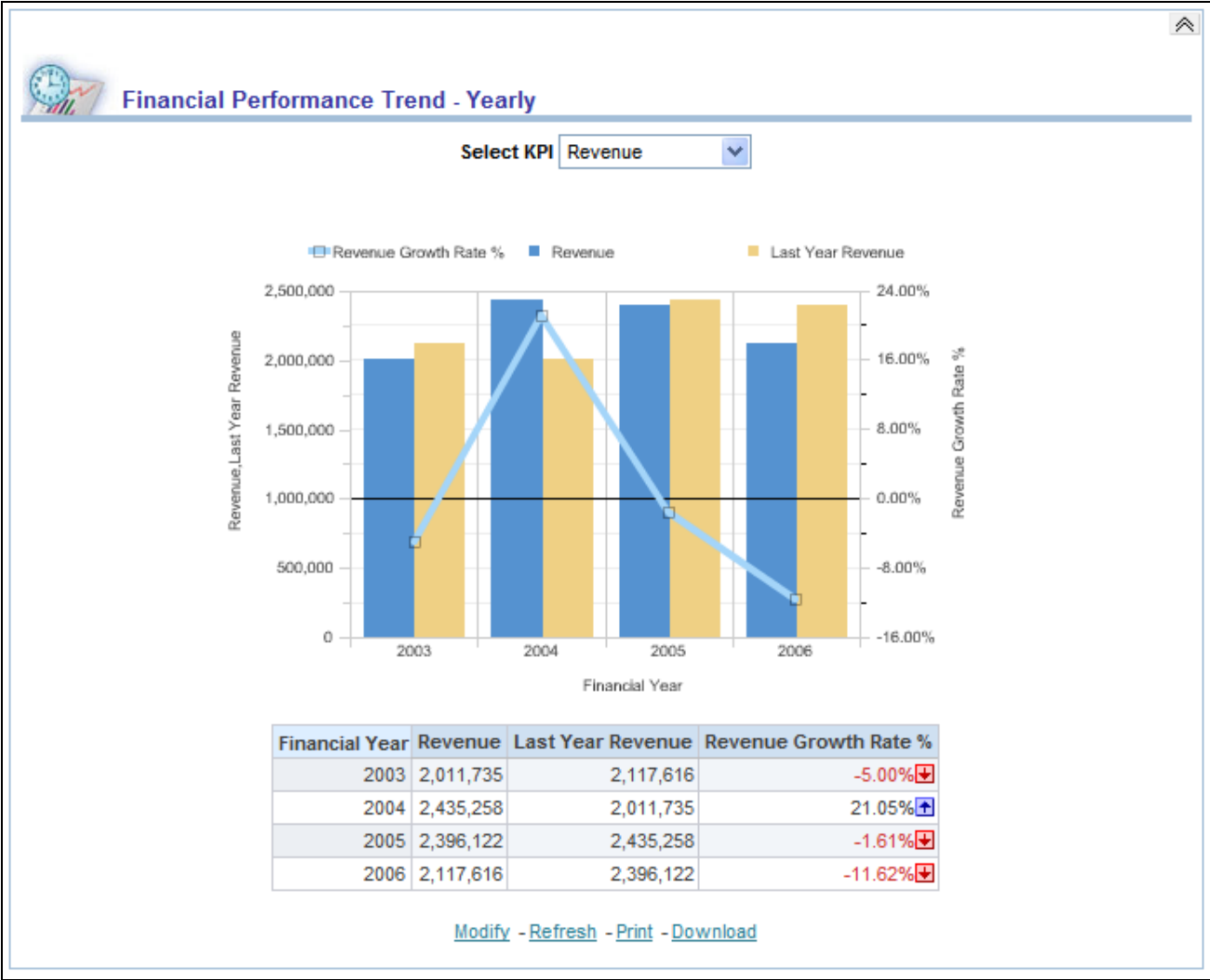


Financial Performance Trend page

| Usage   | Reports   | Dashboard Prompt  |
|---|---|---|
| Provides you with an overview of your organization's financial performance trend, by year and period. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>Financial Performance Trend - Yearly report</li><li>Financial Performance Trend - Period report</li></ul> | <p>Use the Financial Performance Trend page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Calendar</li><li>Financial Year</li><li>Business Unit</li><li>Manager (Department)</li><li>Product Category</li></ul> |

Financial Performance Trend - Yearly Report

Access the Financial Performance Trend - Yearly report, which enables you to analyze financial performance trends by year.



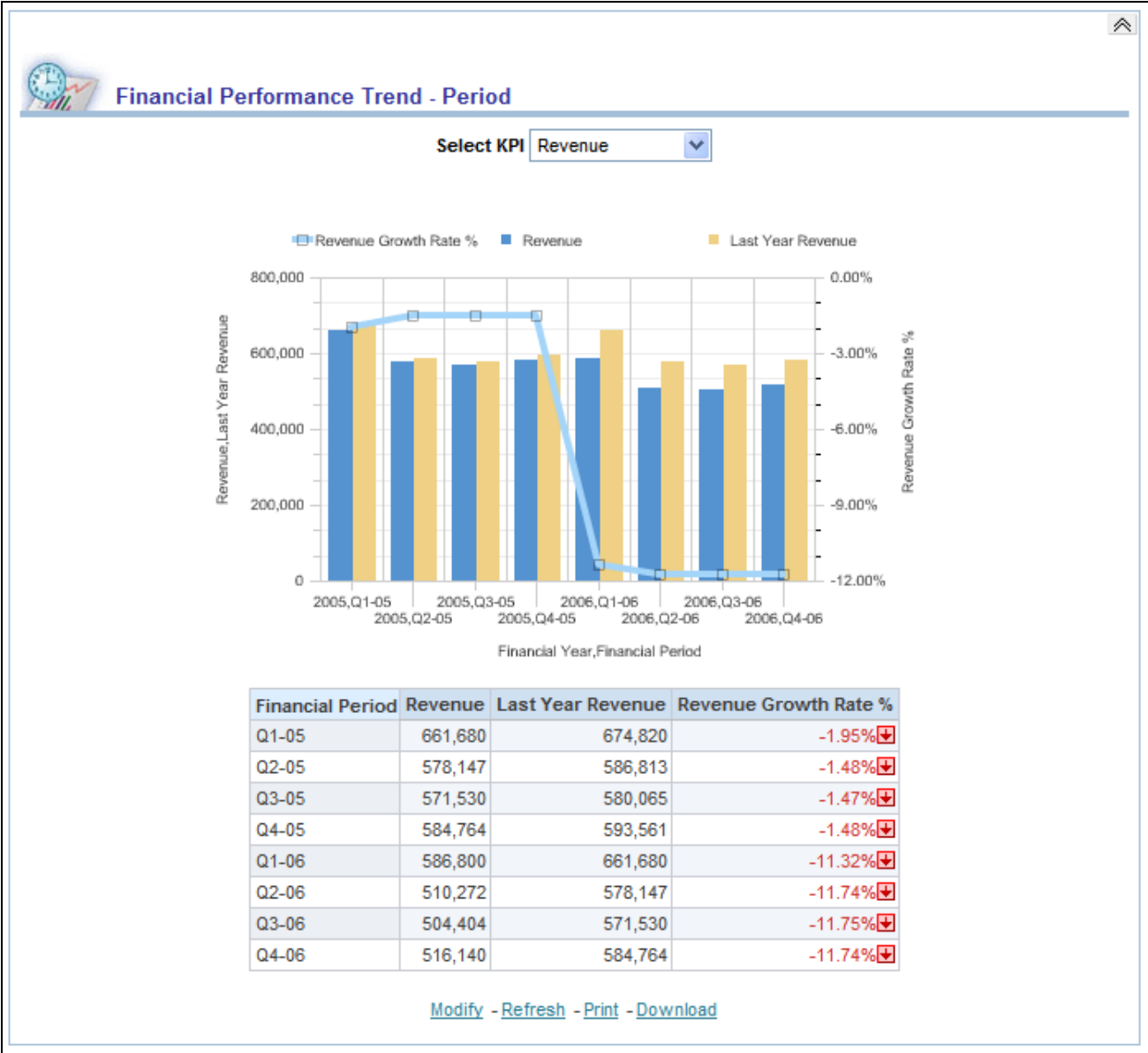
Financial Performance Trend - Yearly Report

|  |   |
|--|---|
| <b>Select KPI - Revenue</b>  | <b>Select KPI - Expenses</b>  |
| The KPI - Revenue graph displays <i>Financial Year</i> data on the x-axis and <i>Revenue</i> , <i>Last Year Revenue</i> and <i>Revenue Growth Rate %</i> data on the y-axis. | The KPI - Expenses graph displays <i>Financial Year</i> data on the x-axis and <i>Expenses</i> , <i>Last Year Expenses</i> and <i>Expense Growth Rate %</i> data on the y-axis. |

|  |  |
|--|--|
| <b>Select KPI - COGS</b>   | <b>Select KPI - Operating Income</b>   |
| The KPI - COGS graph displays <i>Financial Year</i> data on the x-axis and <i>COGS Actual Amount</i> , <i>Last Year COGS Actual Amount</i> and <i>COGS Growth Rate %</i> data on the y-axis. | The KPI - Operating Income graph displays <i>Financial Year</i> data on the x-axis and <i>Operating Income Actual Amount</i> , <i>Last Year Operating Income Actual Amount</i> and <i>Operating Income Growth Rate %</i> data on the y-axis. |

Financial Performance Trend - Period Report

Access the Financial Performance Trend - Period report, which enables you to analyze financial performance trends by period.



Financial Performance Trend - Period Report

| Select KPI - Revenue   | Select KPI - Expenses   |
|--|---|
| The KPI - Revenue graph displays <i>Financial Year, Period</i> data on the x-axis and <i>Revenue, Last Year Revenue</i> and <i>Revenue Growth Rate %</i> data on the y-axis. | The KPI - Expenses graph displays <i>Financial Year, Period</i> data on the x-axis and <i>Expenses, Last Year Expenses</i> and <i>Expense Growth Rate %</i> data on the y-axis. |

| Select KPI - COGS  | Select KPI - Operating Income  |
|--|--|
| The KPI - COGS graph displays <i>Financial Year, Period</i> data on the x-axis and <i>COGS Actual Amount, Last Year COGS Actual Amount</i> and <i>COGS Growth Rate %</i> data on the y-axis. | The KPI - Operating Income graph displays <i>Financial Year, Period</i> data on the x-axis and <i>Operating Income Actual Amount, Last Year Operating Income Actual Amount</i> and <i>Operating Income Growth Rate %</i> data on the y-axis. |

## Chapter 7

# Working with Delivered OBIEE Dashboards for the Human Capital Management (HCM) Warehouse

This chapter provides prerequisites, an overview of delivered OBIEE dashboards for the HCM Warehouse, and discusses:

- Recruitment Analysis Dashboard - Recruitment Demand Page
- Recruitment Analysis Dashboard - Recruiting Effectiveness Page
- Recruitment Analysis Dashboard - Applicant Trending Page
- Workforce Profile Dashboard - Overview Page
- Workforce Profile Dashboard - Workforce Demographics Page
- Workforce Profile Dashboard - Contingent Workforce Analysis Page
- Workforce Profile Dashboard - Turnover Trend Page
- Workforce Profile Dashboard - Workforce Activity Page
- Workforce Profile Dashboard - Top Performer Turnover Page
- Workforce Profile Dashboard - EEO Compliance Page
- Workforce Profile Dashboard - Headcount Distribution Page
- Workforce Profile Dashboard - Demographic Trend Page
- Workforce Profile Dashboard - Employee Demographics Page
- Workforce Profile Dashboard - Pay for Performance Page

---

## Prerequisites

Before you use dashboards for the HCM Warehouse, you must implement:

- PeopleSoft HCM Warehouse.
- PeopleSoft Enterprise Human Resources Management System (HRMS), which supplies transaction data to the HCM Warehouse.

---

## Understanding Dashboards for the HCM Warehouse

The prebuilt dashboard and reports packaged for the HCM Warehouse help you proactively monitor workforce trends and retention. You can optimize your workforce by capturing and analyzing data regarding workforce demographics, movement, and turnover.

PeopleSoft provides dashboards that map to the following HCM Warehouse data marts:

- Compensation
- Learning and Development
- Recruiting
- Workforce Profile

### Guided Navigation

The Turnover Trend page in the Workforce Profile dashboard contains the Turnover Correlation Guided Navigation that appears conditionally based on the voluntary turnover results. When the system detects that voluntary turnover exceeds its predefined threshold of 20%, a link appears in the Turnover Trend section so that you can easily access the Employee Termination Detail report for further investigation.

You can change the delivered threshold value by accessing the Create/Edit Filter page for the Voluntary Term Rate column and editing the filter, as shown in this example:

The screenshot shows a 'Create/Edit Filter' dialog box. At the top left is the title 'Create/Edit Filter' and a 'Help' link at the top right. Below the title, the 'Column' is set to 'Voluntary Term Rate'. The 'Operator' is set to 'is greater than' with a dropdown arrow. The 'Value' is set to '20' with a red 'X' icon to its right. At the bottom, there are buttons for 'Add >', 'Clear Values', 'Advanced >', 'OK', and 'Cancel'.

Create/Edit Filter page



See [Chapter 7, "Working with Delivered OBIEE Dashboards for the Human Capital Management \(HCM\) Warehouse," Using the Workforce Profile Dashboard - Turnover Trend Page, page 163.](#)

### **See Also**

*Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, "Filtering Requests in Oracle BI Answers."

## **Delivered Security Groups**

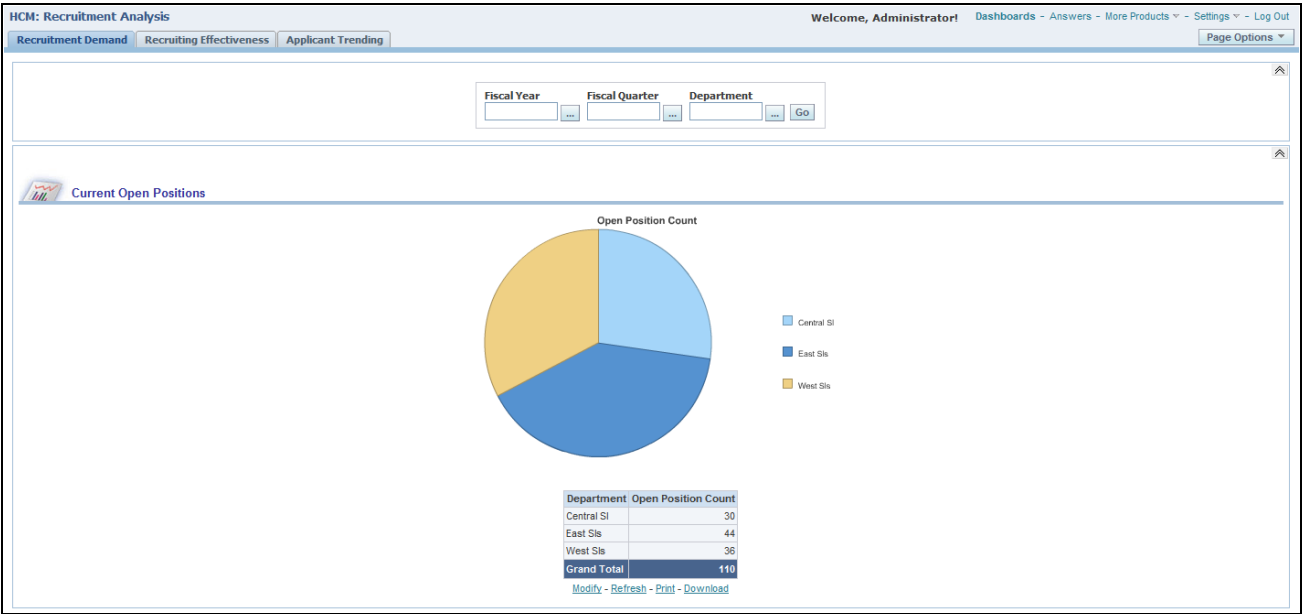
This list contains the financials-oriented Oracle BI Server and Oracle Presentation Catalog security groups provided for the HCM Warehouse:

- HCM Executive
- HCM Manager
- Line Manager

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## **Using the Recruitment Analysis Dashboard - Recruitment Demand Page**

Access the Recruitment Demand page (HCM: Human Capital Management, HCM: Recruitment Analysis, Recruitment Demand).

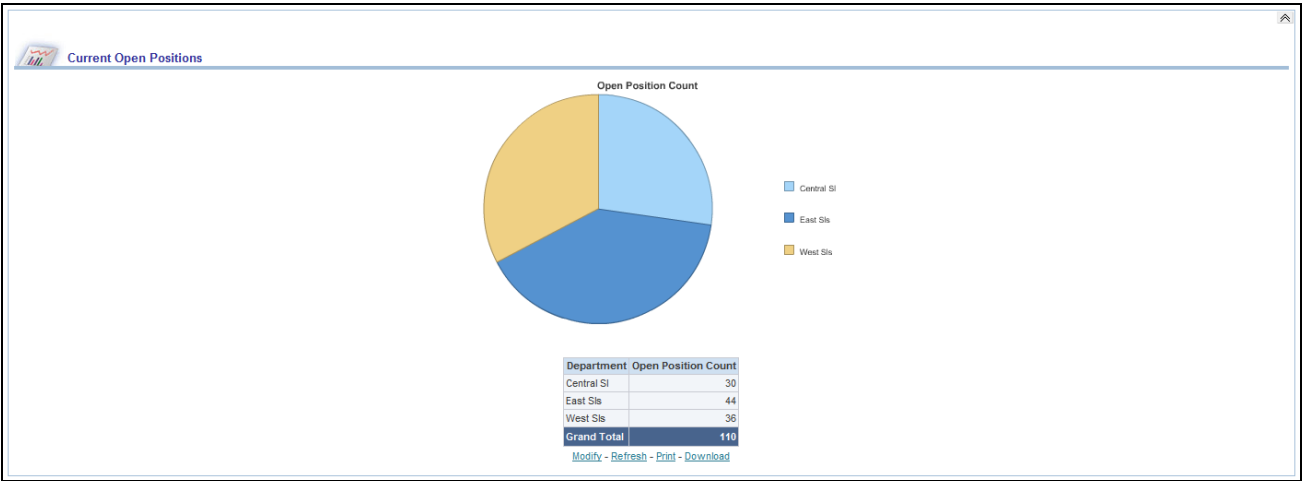


Recruitment Demand page

| Usage  | Reports  | Dashboard Prompt   |
|--|--|--|
| Provides you with an overview of recruiting metrics for your organization, including open positions and hiring demand counts analysis. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Current Open Positions report</li><li>Hiring Demand Analysis report</li><li>Hiring Demand Surge Details report</li></ul> | <div>Use the Recruitment Demand page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Fiscal Year</li><li>Fiscal Quarter</li><li>Department</li></ul> |

Current Open Positions Report

Access the Current Open Positions report, which enables you to analyze current open positions within your organization by individual department.



Current Open Positions Report

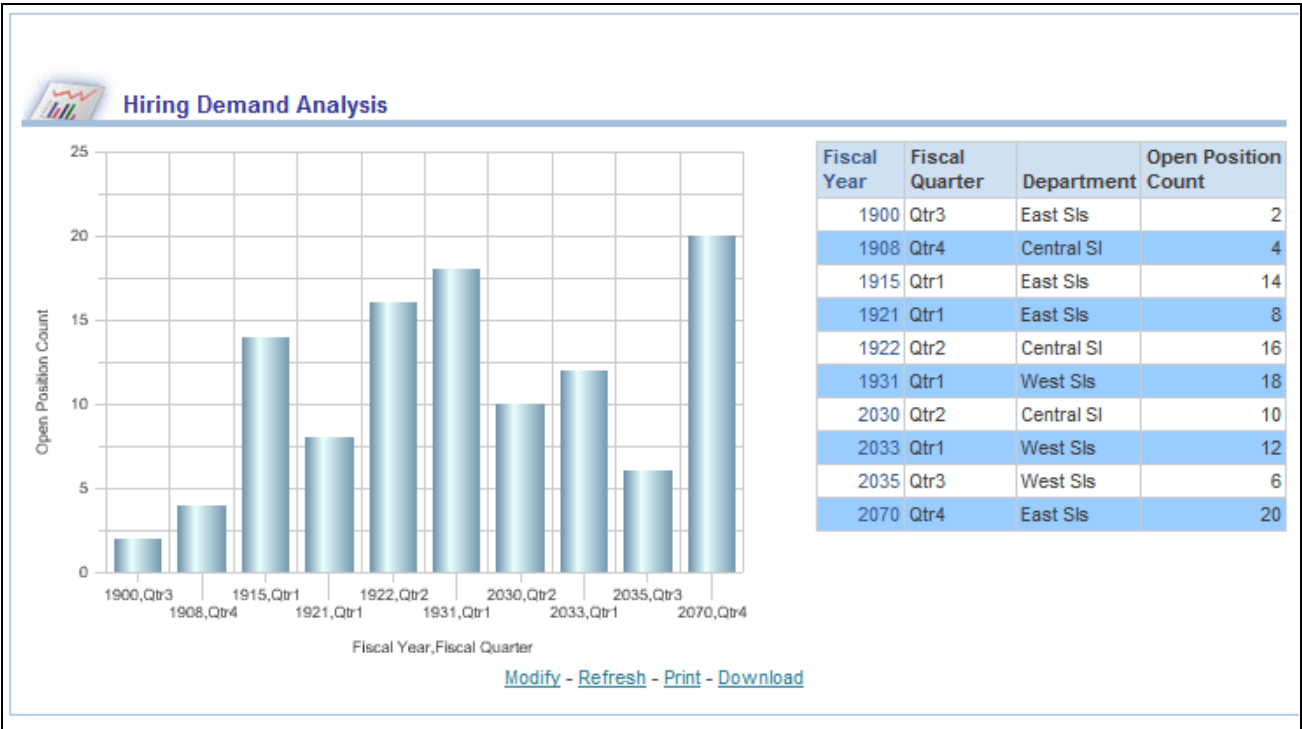
The pie chart displays open position count percentage grouped by *department*.

The following table lists the columns and measures used in the Current Open Positions report.

| Report Column / Measure Name | Report Column / Measure Origin |
|------------------------------|--------------------------------|
| Fiscal Year                  | Day (D_DAY) Dimension          |
| Fiscal Quarter               | Day (D_DAY) Dimension          |
| Department                   | Department (D_DEPT) Dimension  |
| Open Position Count          | Recruitment (F_RCMNT) Fact     |

Hiring Demand Analysis Report

Access the Hiring Demand Analysis report, which enables you to analyze hiring demands for your organization and view details of open position headcount by fiscal year, fiscal quarter, and department.



Hiring Demand Analysis Report

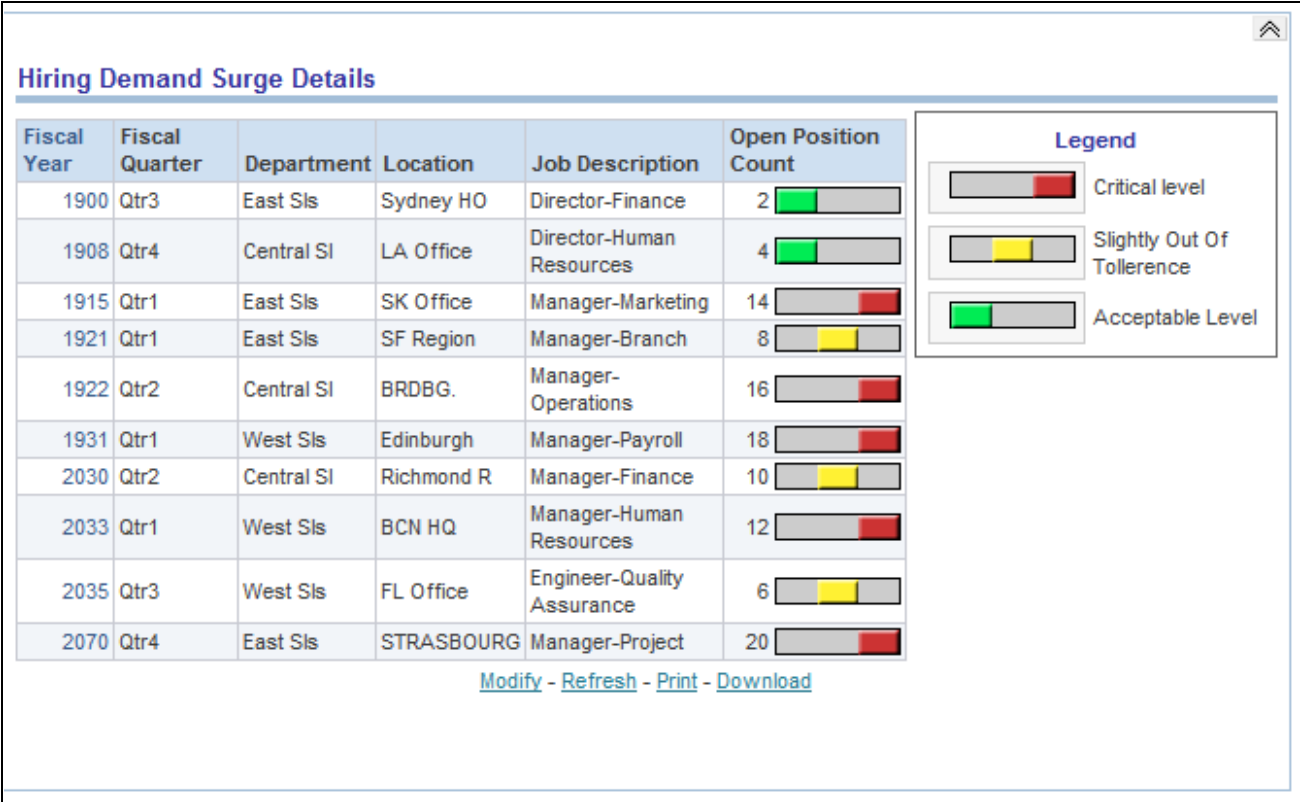
The Hiring Demand Analysis graph displays *Fiscal Year*, *Fiscal Quarter* data on the x-axis and *Open Position Count* data on the y-axis.

The following table lists the columns and measures used in the Hiring Demand Analysis report.

| Report Column / Measure Name | Report Column / Measure Origin |
|------------------------------|--------------------------------|
| Fiscal Year                  | Day (D_DAY) Dimension          |
| Fiscal Quarter               | Day (D_DAY) Dimension          |
| Department                   | Department (D_DEPT) Dimension  |
| Open Position Count          | Recruitment (F_RCMNT) Fact     |

Hiring Demand Surge Details Report

Access the Hiring Demand Surge Details report, which enables you to analyze hiring demands for an organization and view details of open position headcount by fiscal year, fiscal quarter, department, region, and job description.



Hiring Demand Surge Details Report

The following table lists the columns and measures used in the Hiring Demand Surge Details report.

| Report Column / Measure Name | Report Column / Measure Origin           |
|------------------------------|--|
| Fiscal Year                  | Day (D_DAY) Dimension                    |
| Fiscal Quarter               | Day (D_DAY) Dimension                    |
| Location                     | Location (D_LOCATION) Dimension          |
| Job Code                     | Employee Job Code (D_EMPL_JOB) Dimension |
| Department                   | Department (D_DEPT) Dimension            |
| Open Position Count          | Recruitment (F_RCMNT) Fact               |

# Using the Recruitment Analysis Dashboard - Recruiting Effectiveness Page

Access the Recruiting Effectiveness page (HCM: Human Capital Management, HCM: Recruitment Analysis, Recruiting Effectiveness).



Recruiting Effectiveness page

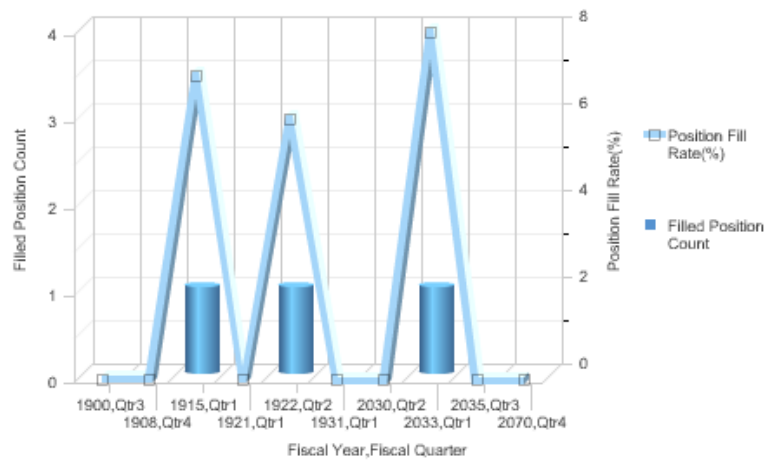
| Usage  | Reports  | Dashboard Prompt   |
|--|--|--|
| Provides you with an overview of recruiting effectiveness metrics for your organization, including vacancy fill rates, time to fill analysis, and recruiting source effectiveness. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>Vacancy Fill Rate report</li><li>Time to Fill report</li><li>Recruiting Source Effectiveness report</li><li>Vacancy Fill Rate Details report</li><li>Recruiting Source Effectiveness Detail report</li></ul> | <p>Use the Recruiting Effectiveness page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Fiscal Year</li><li>Fiscal Quarter</li><li>Department</li></ul> |

Vacancy Fill Rate Report

Access the Vacancy Fill Rate report, which enables you to analyze vacancy fill rates for your organization and view details about job openings count, hire count, and job fill rate percentage.



## Vacancy Fill Rate



| Fiscal Year | Fiscal Quarter | Open Position Count | Filled Position Count | Position Fill Rate(%) |
|-------------|----------------|---------------------|-----------------------|-----------------------|
| 1900        | Qtr3           | 2                   | 0                     | 0                     |
| 1900 Total  |                | 2                   | 0                     | 0                     |
| 1908        | Qtr4           | 4                   | 0                     | 0                     |
| 1908 Total  |                | 4                   | 0                     | 0                     |
| 1915        | Qtr1           | 14                  | 1                     | 7                     |
| 1915 Total  |                | 14                  | 1                     | 7                     |
| 1921        | Qtr1           | 8                   | 0                     | 0                     |
| 1921 Total  |                | 8                   | 0                     | 0                     |
| 1922        | Qtr2           | 16                  | 1                     | 6                     |
| 1922 Total  |                | 16                  | 1                     | 6                     |
| 1931        | Qtr1           | 18                  | 0                     | 0                     |
| 1931 Total  |                | 18                  | 0                     | 0                     |
| 2030        | Qtr2           | 10                  | 0                     | 0                     |
| 2030 Total  |                | 10                  | 0                     | 0                     |
| 2033        | Qtr1           | 12                  | 1                     | 8                     |
| 2033 Total  |                | 12                  | 1                     | 8                     |
| 2035        | Qtr3           | 6                   | 0                     | 0                     |
| 2035 Total  |                | 6                   | 0                     | 0                     |
| 2070        | Qtr4           | 20                  | 0                     | 0                     |
| 2070 Total  |                | 20                  | 0                     | 0                     |

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### Vacancy Fill Rate Report

The Vacancy Fill Rate graph displays *Fiscal Year*, *Fiscal Quarter* data on the x-axis and *Filled Position Count* and *Position Fill Rate* data on the y-axis.

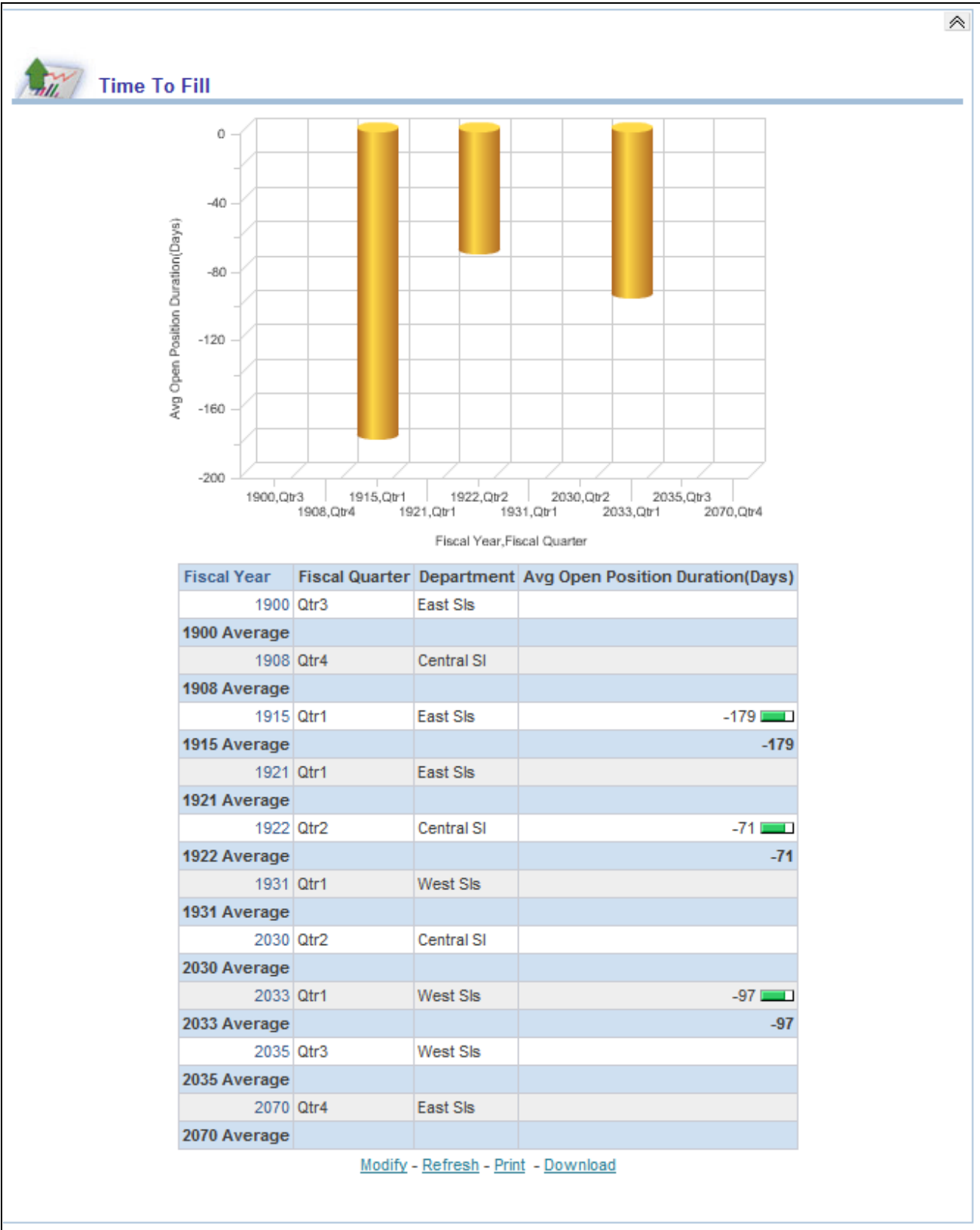
The following table lists the columns and measures used in the Vacancy Fill Rate report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>   |
|-------------------------------------|---|
| Department                          | Department (D_DEPT) Dimension   |
| Fiscal Year                         | Day (D_DAY) Dimension   |
| Fiscal Quarter                      | Day (D_DAY) Dimension   |
| Open Position Count                 | Recruitment (F_RCMNT) Fact  |
| Filled Position Count               | Recruitment (F_RCMNT) Fact  |
| Position Fill Rate (%)              | ("Fact Recruitment"."Hire Count") / ("Fact Job Opening"."Job Openings Count") * 100 |

## Time to Fill Report

Access the Time to Fill report, which enables you to analyze the time it takes for various departments in your organization to fill a job opening.





Time to Fill Report

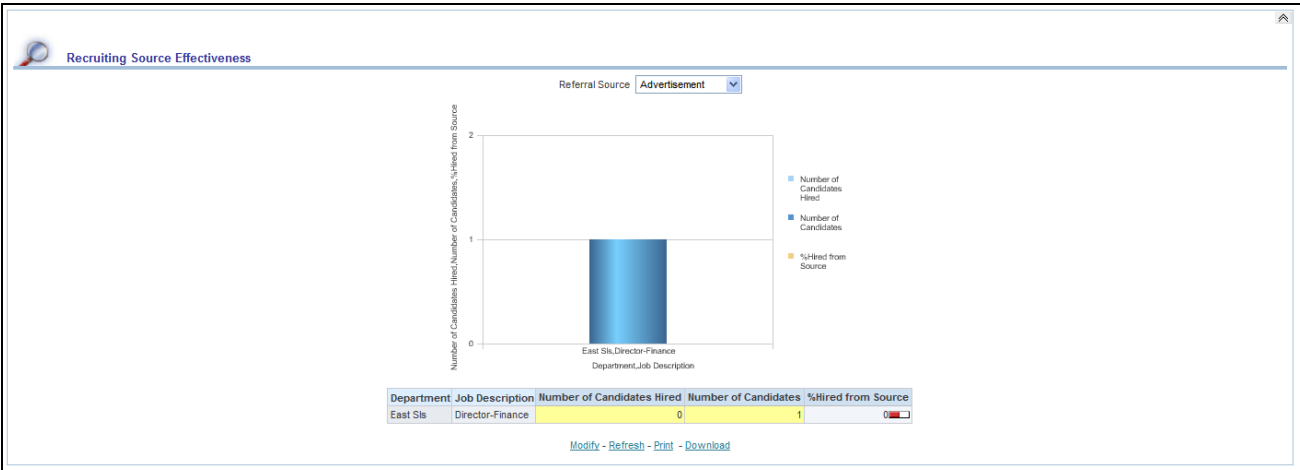
The Time to Fill graph displays *Fiscal Year*, *Fiscal Quarter* data on the x-axis and *Average Open Position Duration (Days)* data on the y-axis.

The following table lists the columns and measures used in the Time to Fill report.

| <b>Report Column / Measure Name</b>   | <b>Report Column / Measure Origin</b>  |
|---------------------------------------|--|
| Department                            | Department (D_DEPT) Dimension  |
| Fiscal Year                           | Day (D_DAY) Dimension  |
| Fiscal Quarter                        | Day (D_DAY) Dimension  |
| Average Open Position Duration (Days) | Recruitment (F_RCMNT) Fact:<br>CASE WHEN Dimension Recruitment Status Reason.Recruitment Area Code = '3' AND Dimension Recruitment Status Reason.Recruitment Status Code IN ('090','100','110','120') THEN ( "Dimension Day Entry Date"."Entry Day Date"-"Dimension Day Status Date"."Status Day Date" ) ELSE NULL END |

## Recruiting Source Effectiveness Report

Access the Recruiting Source Effectiveness report, which enables you to analyze the effectiveness of your organization's recruiting sources and view details about the number of candidates hired by department, job, referral source and referral source percentage.



Recruiting Source Effectiveness Report

| X,Y Axis Data   | Referral Source Filter   |
|---|--|
| <p>The Recruiting Source Effectiveness graph displays <i>Department</i> and <i>Job Description</i> data on the x-axis and <i>Number of Candidates</i>, <i>Number of Candidates Hired</i> and <i>% Hired from Source</i> data on the y-axis.</p> | <p>Use this filter to view report results by the following referral sources:</p> <ul style="list-style-type: none"><li>Advertisement</li><li>Client Referral</li><li>Walk-In</li><li>Employee</li><li>Executive Referral</li><li>Former Employee</li><li>Job Fair</li><li>Open House</li><li>College Recruiting</li><li>Agency</li></ul> |

The following table lists the columns and measures used in the Recruiting Source Effectiveness report.

| Report Column / Measure Name | Report Column / Measure Origin           |
|------------------------------|--|
| Department                   | Department (D_DEPT) Dimension            |
| Fiscal Year                  | Day (D_DAY) Dimension                    |
| Fiscal Quarter               | Day (D_DAY) Dimension                    |
| Job Code                     | Employee Job Code (D_EMPL_JOB) Dimension |

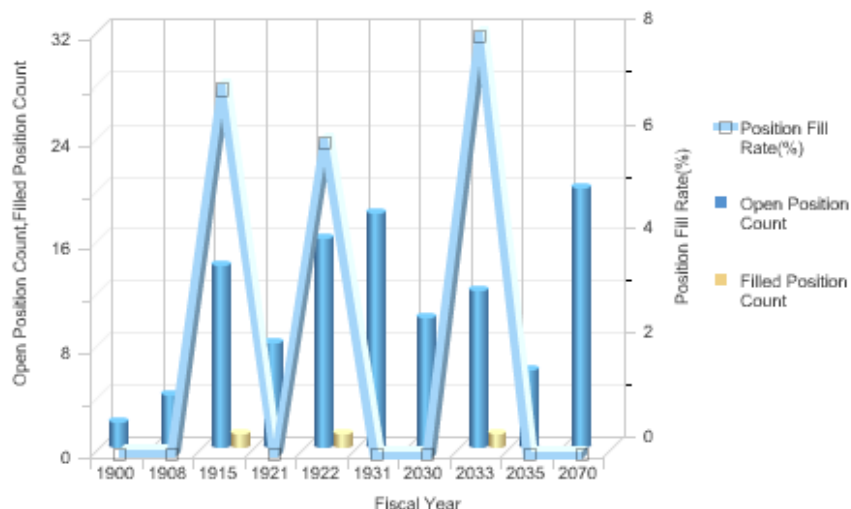
| <b>Report Column / Measure Name</b>  | <b>Report Column / Measure Origin</b>  |
|--------------------------------------|--|
| Referral Source Category Description | Referral Source Category (D_REF_SRC_CAT) Dimension                             |
| Number of Candidates                 | Recruitment (F_RCMNT) Fact   |
| Number of Candidates Hired           | Recruitment (F_RCMNT) Fact   |
| % Hired from Source                  | ("Fact Recruitment"."Hire Count"/"Fact Recruitment"."Applicant Headcount")*100 |

## Vacancy Fill Rate Details Report

Access the Vacancy Fill Rate Details report, which enables you to analyze job vacancy fill rates for various departments in your organization and view details about job openings count, hire count, and job fill rate percentage.

## Vacancy Fill Rate Details

View By Job Description



| Fiscal Year | Fiscal Quarter | Department | Job Description            | Open Position Count | Filled Position Count | Position Fill Rate (%) |
|-------------|----------------|------------|----------------------------|---------------------|-----------------------|------------------------|
| 1900        | Qtr3           | East Sls   | Director-Finance           | 2                   | 0                     | 0 ▼                    |
| 1900 Total  |                |            |                            | 2                   | 0                     | 0                      |
| 1908        | Qtr4           | Central SI | Director-Human Resources   | 4                   | 0                     | 0 ▼                    |
| 1908 Total  |                |            |                            | 4                   | 0                     | 0                      |
| 1915        | Qtr1           | East Sls   | Manager-Marketing          | 14                  | 1                     | 7 ▼                    |
| 1915 Total  |                |            |                            | 14                  | 1                     | 7                      |
| 1921        | Qtr1           | East Sls   | Manager-Branch             | 8                   | 0                     | 0 ▼                    |
| 1921 Total  |                |            |                            | 8                   | 0                     | 0                      |
| 1922        | Qtr2           | Central SI | Manager-Operations         | 16                  | 1                     | 6 ▼                    |
| 1922 Total  |                |            |                            | 16                  | 1                     | 6                      |
| 1931        | Qtr1           | West Sls   | Manager-Payroll            | 18                  | 0                     | 0 ▼                    |
| 1931 Total  |                |            |                            | 18                  | 0                     | 0                      |
| 2030        | Qtr2           | Central SI | Manager-Finance            | 10                  | 0                     | 0 ▼                    |
| 2030 Total  |                |            |                            | 10                  | 0                     | 0                      |
| 2033        | Qtr1           | West Sls   | Manager-Human Resources    | 12                  | 1                     | 8 ▼                    |
| 2033 Total  |                |            |                            | 12                  | 1                     | 8                      |
| 2035        | Qtr3           | West Sls   | Engineer-Quality Assurance | 6                   | 0                     | 0 ▼                    |
| 2035 Total  |                |            |                            | 6                   | 0                     | 0                      |
| 2070        | Qtr4           | East Sls   | Manager-Project            | 20                  | 0                     | 0 ▼                    |
| 2070 Total  |                |            |                            | 20                  | 0                     | 0                      |

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## Vacancy Fill Rate Details Report

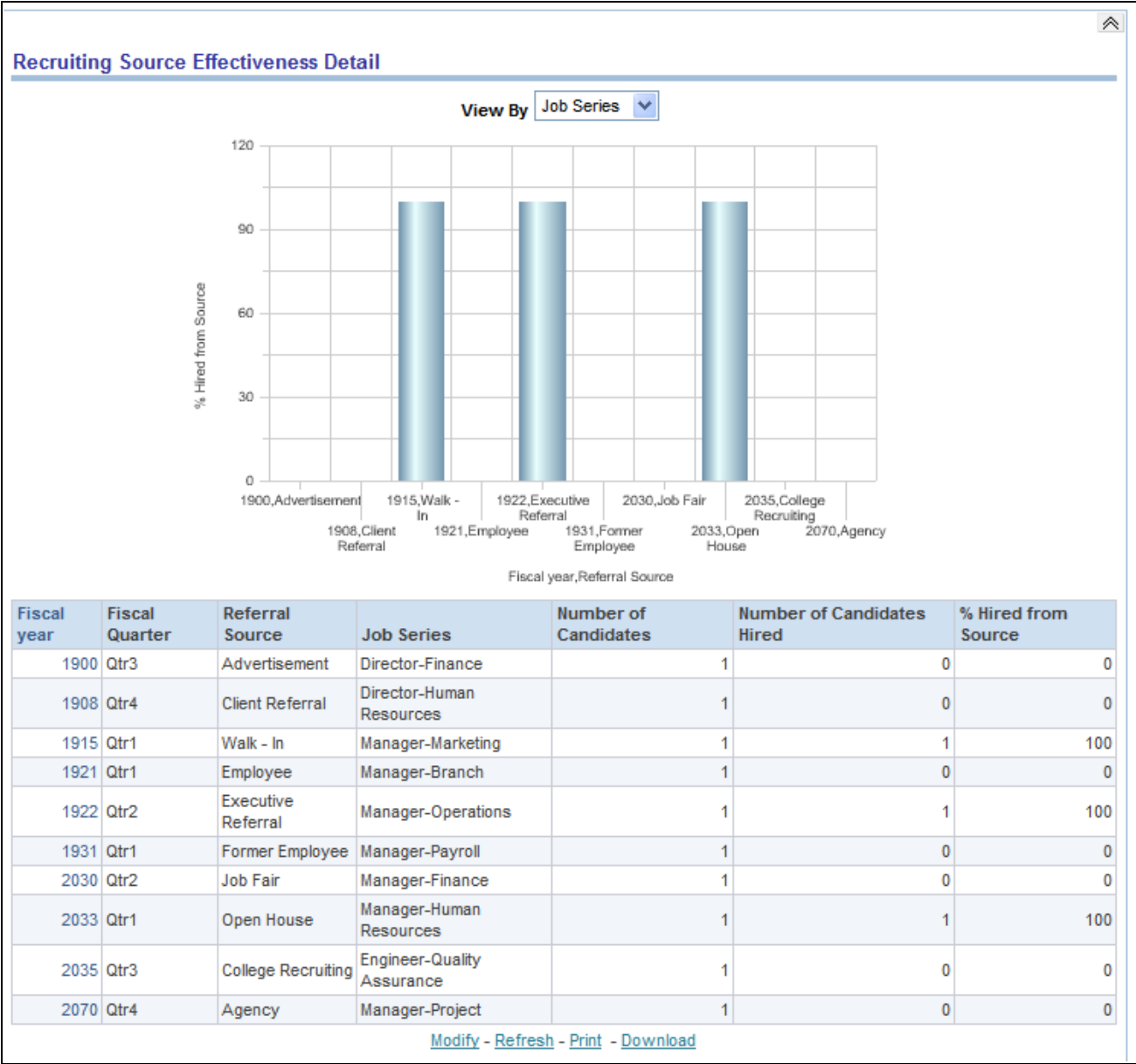
| <b>X,Y Axis Data</b>   | <b>View By Filter</b>   |
|--|---|
| The Vacancy Fill Rate Details graph displays <i>Fiscal Year</i> data on the x-axis and <i>Open Position Count, Filled Position Count</i> and <i>Position Fill Rate</i> data on the y-axis. | Use this filter to view report results by: <ul style="list-style-type: none"> <li>• <i>Location</i></li> <li>• <i>Job Family Description</i></li> <li>• <i>Job Description</i> (default)</li> <li>• <i>Grade</i></li> </ul> |

The following table lists the columns and measures used in the Vacancy Fill Rate Details report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>   |
|-------------------------------------|---|
| Fiscal Year                         | Day (D_DAY) Dimension   |
| Fiscal Quarter                      | Day (D_DAY) Dimension   |
| Department                          | Department (D_DEPT) Dimension   |
| Location                            | Location (D_LOCATION) Dimension   |
| Job Description                     | Employee Job Code (D_EMPL_JOB) Dimension  |
| Job Family Description              | Employee Job Code (D_EMPL_JOB) Dimension  |
| Grade                               | Employee Job Code (D_EMPL_JOB) Dimension  |
| Filled Position Count               | Recruitment (F_RCMNT) Fact  |
| Open Position Count                 | Recruitment (F_RCMNT) Fact  |
| Position Fill Rate (%)              | $(\text{"Fact Recruitment"."Hire Count"}) / (\text{"Fact Job Opening"."Job Openings Count"}) * 100$ |

## Recruiting Source Effectiveness Detail Report

Access the Recruiting Source Effectiveness Detail report, which enables you to analyze recruiting source effectiveness for your organization.



Recruiting Source Effectiveness Detail Report

| X,Y Axis Data   | View By Filter  |
|---|---|
| The Recruiting Source Effectiveness Detail graph displays <i>Fiscal Year</i> and <i>Referral Source</i> data on the x-axis and <i>Percent Hired from Source</i> data on the y-axis. | Use this filter to view report results by: <ul style="list-style-type: none"><li>Location</li><li>Department</li><li>Job Series (default)</li></ul> |

The following table lists the columns and measures used in the Recruiting Source Effectiveness Detail report.

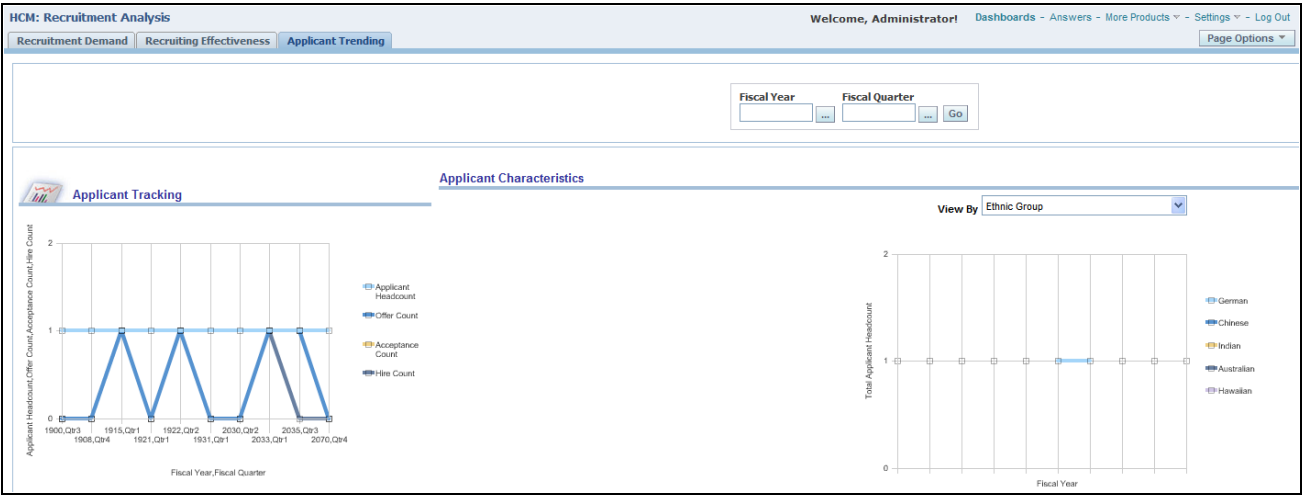
| <b>Report Column / Measure Name</b>  | <b>Report Column / Measure Origin</b>                                     |
|--------------------------------------|---|
| Fiscal Year                          | Day (D_DAY) Dimension   |
| Fiscal Quarter                       | Day (D_DAY) Dimension   |
| Job Code                             | Employee Job Code (D_EMPL_JOB) Dimension                                  |
| Referral Source Category Description | Referral Source Category (D_REF_SRC_CAT) Dimension                        |
| Hire Count                           | Recruitment (F_RCMNT) Fact  |
| Applicant Head Count                 | Recruitment (F_RCMNT) Fact:   |
| % Hired from Source                  | Fact Recruitment.Hire Count / Fact Recruitment.Applicant Head Count * 100 |

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## Using the Recruitment Analysis Dashboard - Applicant Trending Page

Access the Applicant Trending page (HCM: Human Capital Management, HCM: Recruitment Analysis, Applicant Trending).



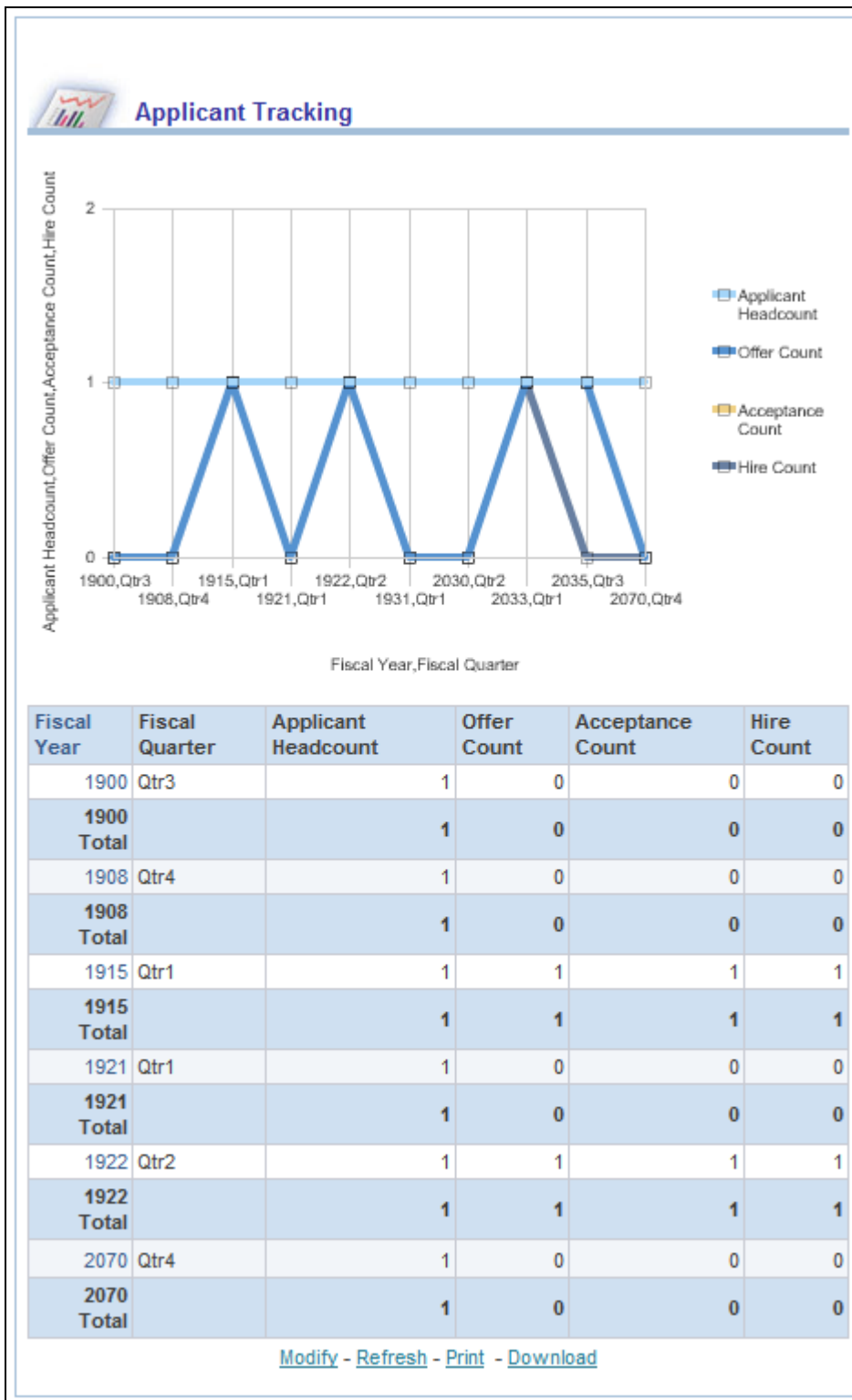


Applicant Trending page

| Usage   | Reports  | Dashboard Prompt  |
|---|--|---|
| Provides an overview of applicant trends and characteristics for your organization. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Applicant Tracking report</li><li>Applicant Characteristics report</li></ul> | <div>Use the Applicant Trending page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Fiscal Year</li><li>Fiscal Quarter</li></ul> |

Applicant Tracking Report

Access the Applicant Tracking report, which enables you to analyze applicant offer, acceptance, hire, and head counts.



### Applicant Tracking Report

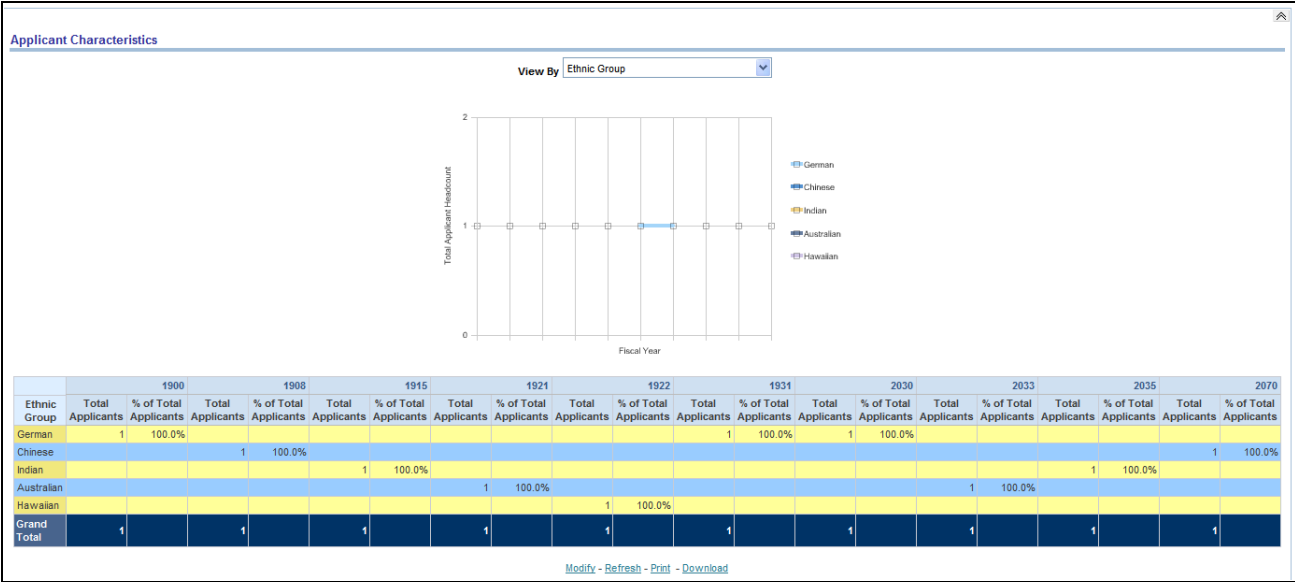
The Applicant Tracking graph displays *Fiscal Year* and *Fiscal Quarter* data on the x-axis and *Applicant Headcount*, *Offer Count*, *Acceptance Count* and *Hire Count* data on the y-axis.

The following table lists the columns and measures used in the Applicant Tracking report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>   |
|-------------------------------------|---|
| Fiscal Year                         | Day (D_DAY) Dimension   |
| Fiscal Quarter                      | Day (D_DAY) Dimension   |
| Applicant Head Count                | Recruitment (F_RCMNT) Fact  |
| Offer Count                         | Recruitment (F_RCMNT) Fact:<br>COUNT_DISTINCT(CASE WHEN Dimension<br>Recruitment Status Reason.Recruitment Area Code = '3'<br>AND Dimension Recruitment Status Reason.Recruitment<br>Status Code IN<br>( '070','071','075','076','077','078','080','090','100','110','120'<br>) THEN Fact Recruitment.Applicant Sid ELSE NULL<br>END) |
| Acceptance Count                    | Recruitment (F_RCMNT) Fact:<br>COUNT_DISTINCT(CASE WHEN Dimension<br>Recruitment Status Reason.Recruitment Area Code = '3'<br>AND Dimension Recruitment Status Reason.Recruitment<br>Status Code IN<br>( '071','075','076','077','078','080','090','100','110','120'<br>) THEN Fact Recruitment.Applicant Sid ELSE NULL<br>END)       |
| Hire Count                          | Recruitment (F_RCMNT) Fact  |

## Applicant Characteristics Report

Access the Applicant Characteristics report, which enables you to analyze applicant characteristics, such as ethnic group, marital status, disability, and highest education level.



Applicant Characteristics Report

| X,Y Axis Data   | View By Filter  |
|---|---|
| <p>The Applicant Characteristics graph displays <i>Fiscal Year</i> data on the x-axis and <i>Total Applicant Headcount</i> and data on the y-axis.</p> <p>The y-axis will also display one of the following values, depending on your View By filter selection:</p> <ul style="list-style-type: none"><li><i>Applicant Marital Status</i></li><li><i>Applicant Disabled Indicator</i></li><li><i>Applicant Highest Education Level</i></li><li><i>Applicant Veterans Preference</i></li><li><i>Applicant Full/Part Time</i></li><li><i>Applicant Salary Grade</i></li><li><i>Ethnic Group</i> (default)</li></ul> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li><i>Applicant Marital Status</i></li><li><i>Applicant Disabled Indicator</i></li><li><i>Applicant Highest Education Level</i></li><li><i>Applicant Veterans Preference</i></li><li><i>Applicant Full/Part Time</i></li><li><i>Applicant Salary Grade</i></li><li><i>Ethnic Group</i> (default)</li></ul> |

The following table lists the columns and measures used in the Applicant Characteristics report.

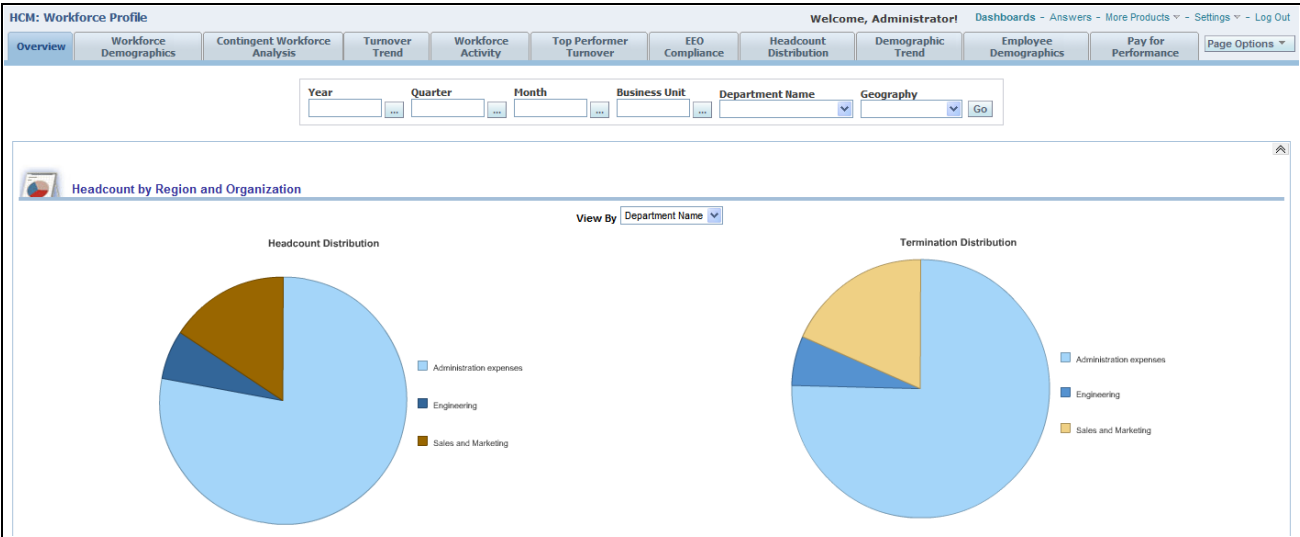
| Report Column / Measure Name     | Report Column / Measure Origin    |
|----------------------------------|-----------------------------------|
| Fiscal Year (Status Year Number) | Day Status Date (D_DAY) Dimension |
| Applicant Ethnic Group           | Applicant (D_APPLICANT) Dimension |
| Applicant Marital Status         | Applicant (D_APPLICANT) Dimension |
| Applicant Disabled Indicator     | Applicant (D_APPLICANT) Dimension |

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b> |
|-------------------------------------|---------------------------------------|
| Applicant Highest Education Level   | Applicant (D_APPLICANT) Dimension     |
| Applicant Veterans Preference       | Applicant (D_APPLICANT) Dimension     |
| Applicant Full/Part Time            | Applicant (D_APPLICANT) Dimension     |
| Applicant Salary Grade              | Applicant (D_APPLICANT) Dimension     |
| Applicant Head Count                | Recruitment (F_RCMNT) Fact            |

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## Using the Workforce Profile Dashboard - Overview Page

Access the Workforce Profile - Overview page (HCM: Human Capital Management, HCM: Workforce Profile, Overview).

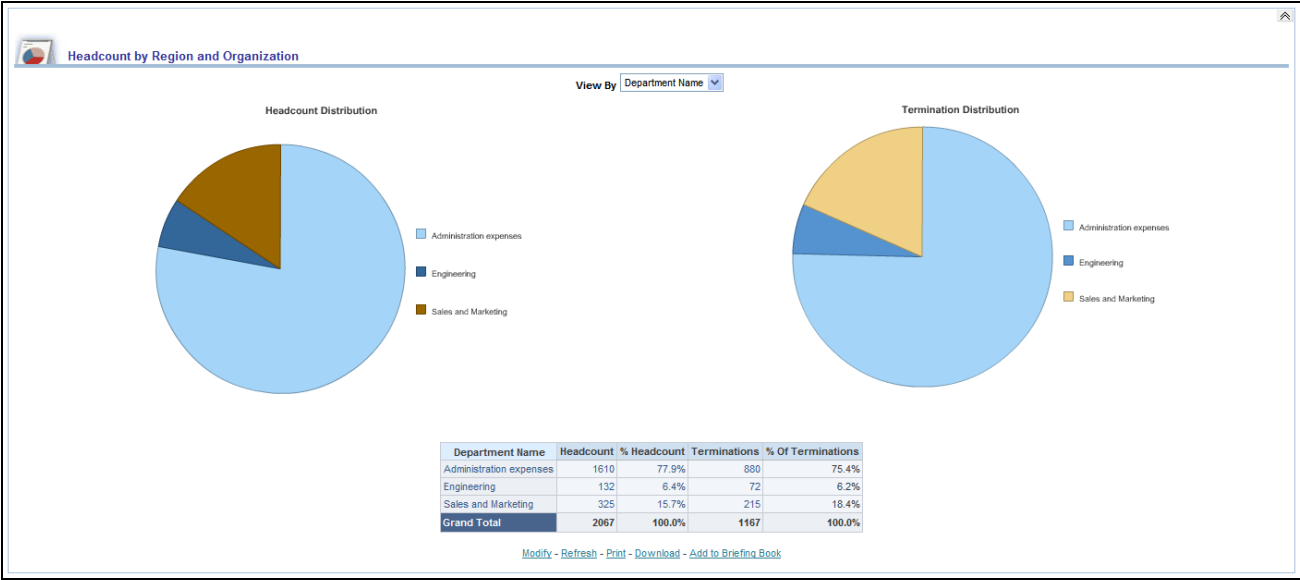


Workforce Profile - Overview page

| Usage  | Reports   | Dashboard Prompt  |
|--|---|---|
| Provides an overview of headcount, turnover, and promotion trends for your organization. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Headcount by Region and Organization report</li><li>Headcount Trend report</li><li>Turnover Trend report</li><li>Promotion Trend report</li></ul> | <div>Use the Workforce Profile - Overview page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Year</li><li>Quarter</li><li>Month</li><li>Business Unit</li><li>Department Name</li><li>Geography</li></ul> |

## Headcount by Region and Organization Report

Access the Headcount by Region report, which enables you to analyze headcount and termination distribution by department or location.



Headcount by Region and Organization Report

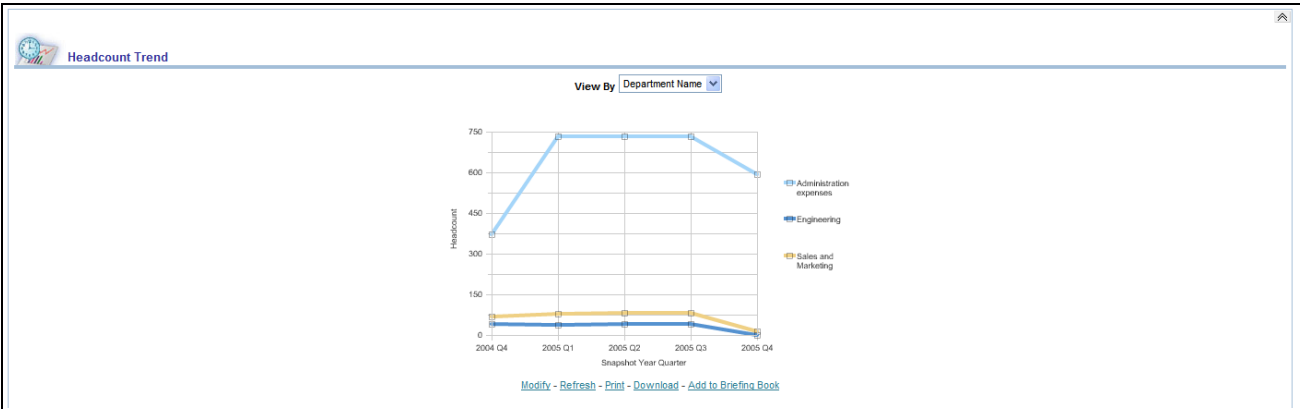
| View By Filter - Department Name (Default)  | View By Filter - Location   |
|---|---|
| <p>The Headcount Distribution pie chart displays <i>Headcount / Percent Headcount</i> data grouped by <i>Department</i>.</p> <p>The Termination Distribution pie chart displays <i>Terminations / Percent Terminations</i> data grouped by <i>Department</i>.</p> <p><b>Note.</b> You can click on a pie slice to drill down to individual department-level data.</p> | <p>The Headcount Distribution pie chart displays <i>Headcount / Percent Headcount</i> data grouped by <i>Location</i>.</p> <p>The Termination Distribution pie chart displays <i>Terminations / Percent Terminations</i> data grouped by <i>Location</i>.</p> <p><b>Note.</b> You can click on a pie slice to drill down to individual location data.</p> |

The following table lists the columns and measures used in the Headcount by Region and Organization report.

| Report Column / Measure Name | Report Column / Measure Origin  |
|------------------------------|---------------------------------|
| Department                   | Department (D_DEPT) Dimension   |
| Location                     | Location (D_LOCATION) Dimension |
| Headcount                    | Workforce (F_WORKFORCE) Fact    |
| Termination (count)          | Workforce (F_WORKFORCE) Fact    |
| % Headcount                  | Workforce (F_WORKFORCE) Fact    |
| % of Termination             | Workforce (F_WORKFORCE) Fact    |

Headcount Trend Report

Access the Headcount Trend report, which provides a trending of headcount by quarter, year, department, and location.



Headcount Trend Report

|  |  |
|--|--|
| <b>X,Y Axis Data</b>   | <b>View By Filter</b>  |
| <p>The Headcount Trend graph displays <i>Snapshot Year, Quarter</i> data on the x-axis and <i>Headcount</i> and <i>Department</i> data on the y-axis.</p> <p>The y-axis can also display <i>Location</i> data if you select the value from the View By filter.</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li>• <i>Department Name</i> (default)</li><li>• <i>Location</i></li></ul> |

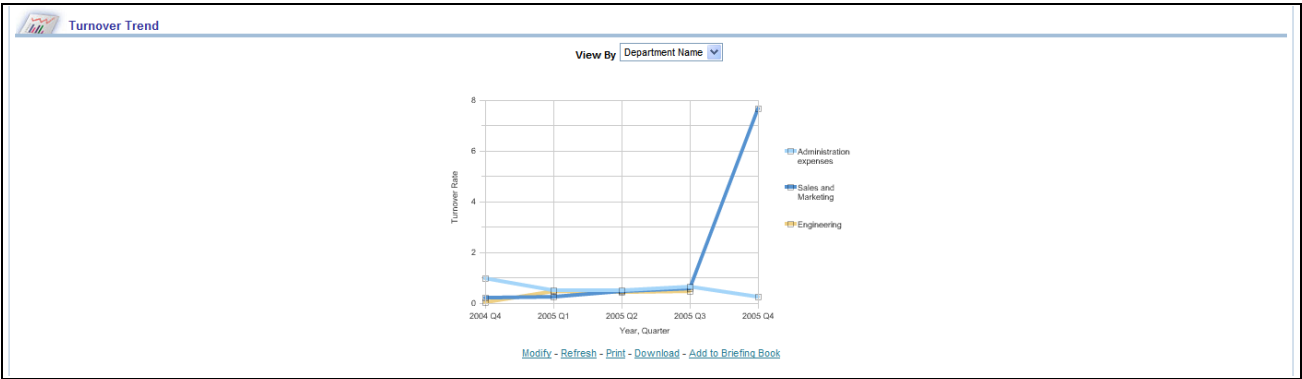
The following table lists the columns and measures used in the Headcount Trend report.

| Report Column / Measure Name | Report Column / Measure Origin  |
|------------------------------|---------------------------------|
| Snapshot Year                | Day (D_DAY) Dimension           |
| Snapshot Quarter             | Day (D_DAY) Dimension           |
| Department                   | Department (D_DEPT) Dimension   |
| Location                     | Location (D_LOCATION) Dimension |
| Headcount                    | Workforce (F_WORKFORCE) Fact    |

Turnover Trend Report

Access the Turnover Trend report, which provides a trending of employee turnover by quarter, year, department, and location.





Turnover Trend Report

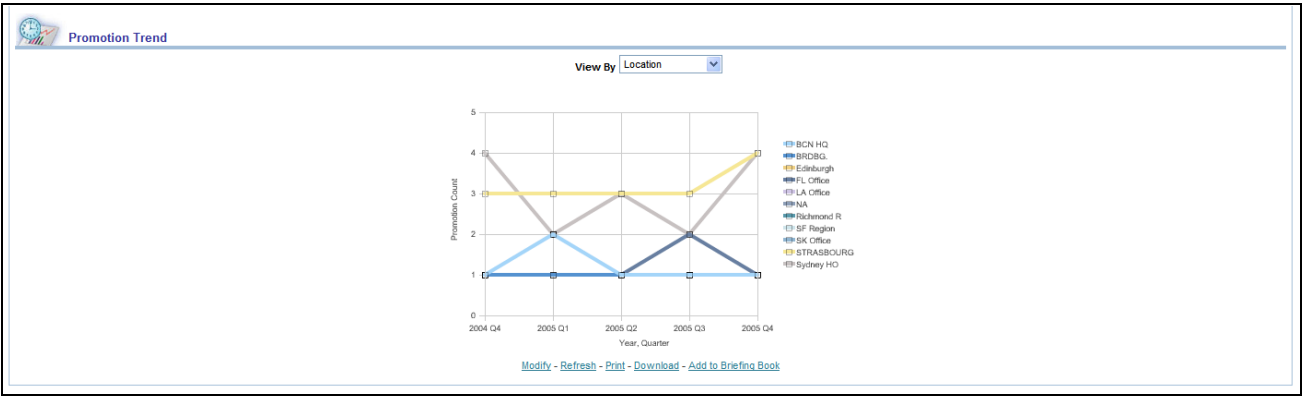
| X,Y Axis Data   | View By Filter   |
|---|--|
| <p>The Turnover Trend graph displays <i>Year</i>, <i>Quarter</i> data on the x-axis and <i>Turnover Rate</i> and <i>Department</i> data on the y-axis.</p> <p>The y-axis can also display <i>Location</i> data if you select the value from the View By filter.</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li><i>Department Name</i> (default)</li><li><i>Location</i></li></ul> |

The following table lists the columns and measures used in the Turnover Trend report.

| Report Column / Measure Name | Report Column / Measure Origin   |
|------------------------------|--|
| Year                         | Day (D_DAY) Dimension  |
| Quarter                      | Day (D_DAY) Dimension  |
| Department                   | Department (D_DEPT) Dimension  |
| Location                     | Location (D_LOCATION) Dimension  |
| Turnover Rate                | Workforce (F_WORKFORCE) Fact:<br>Total Termination Count * (100 / Total Headcount) |

Promotion Trend Report

Access the Promotion Trend report, which provides a trending of employee promotions by quarter, year, department, and location.



Promotion Trend Report

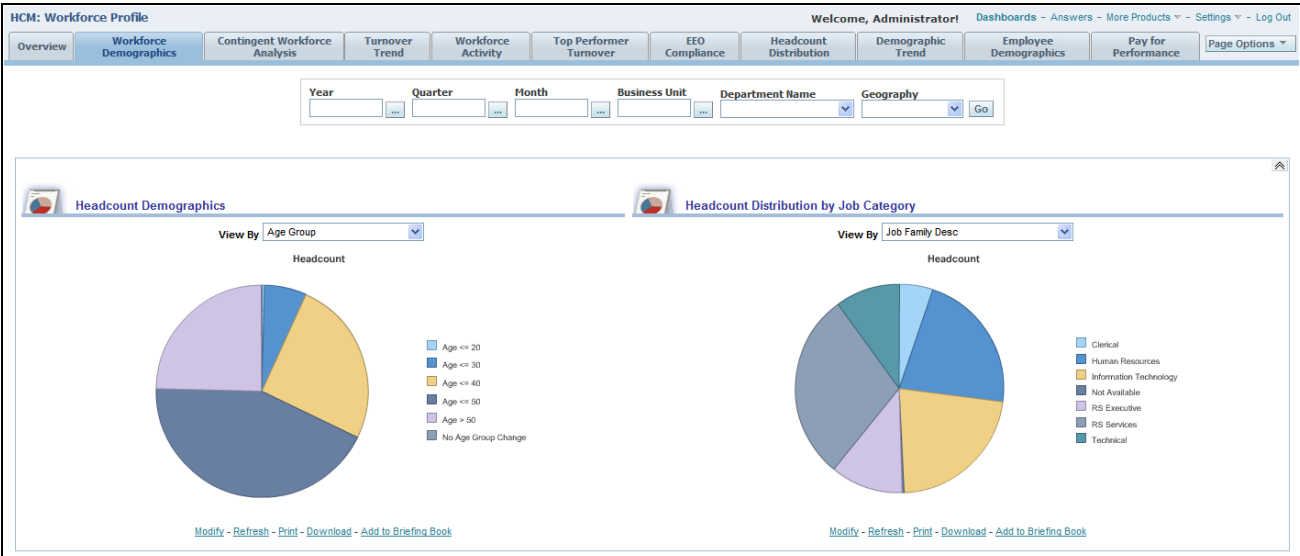
| X,Y Axis Data  | View By Filter   |
|--|--|
| <p>The Promotion Trend graph displays <i>Year, Quarter</i> data on the x-axis and <i>Promotion Count</i> and <i>Department</i> data on the y-axis.</p> <p>The y-axis can also display <i>Location</i> data if you select the value from the <i>View By</i> filter.</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li><i>Department Name</i> (default)</li><li><i>Location</i></li></ul> |

The following table lists the columns and measures used in the Promotion Trend report.

| Report Column / Measure Name | Report Column / Measure Origin  |
|------------------------------|---------------------------------|
| Year                         | Day (D_DAY) Dimension           |
| Quarter                      | Day (D_DAY) Dimension           |
| Department                   | Department (D_DEPT) Dimension   |
| Location                     | Location (D_LOCATION) Dimension |
| Promotion Count              | Workforce (F_WORKFORCE) Fact    |

## Using the Workforce Profile Dashboard - Workforce Demographics Page

Access the Workforce Demographics page (HCM: Human Capital Management, HCM: Workforce Profile, Workforce Demographics).

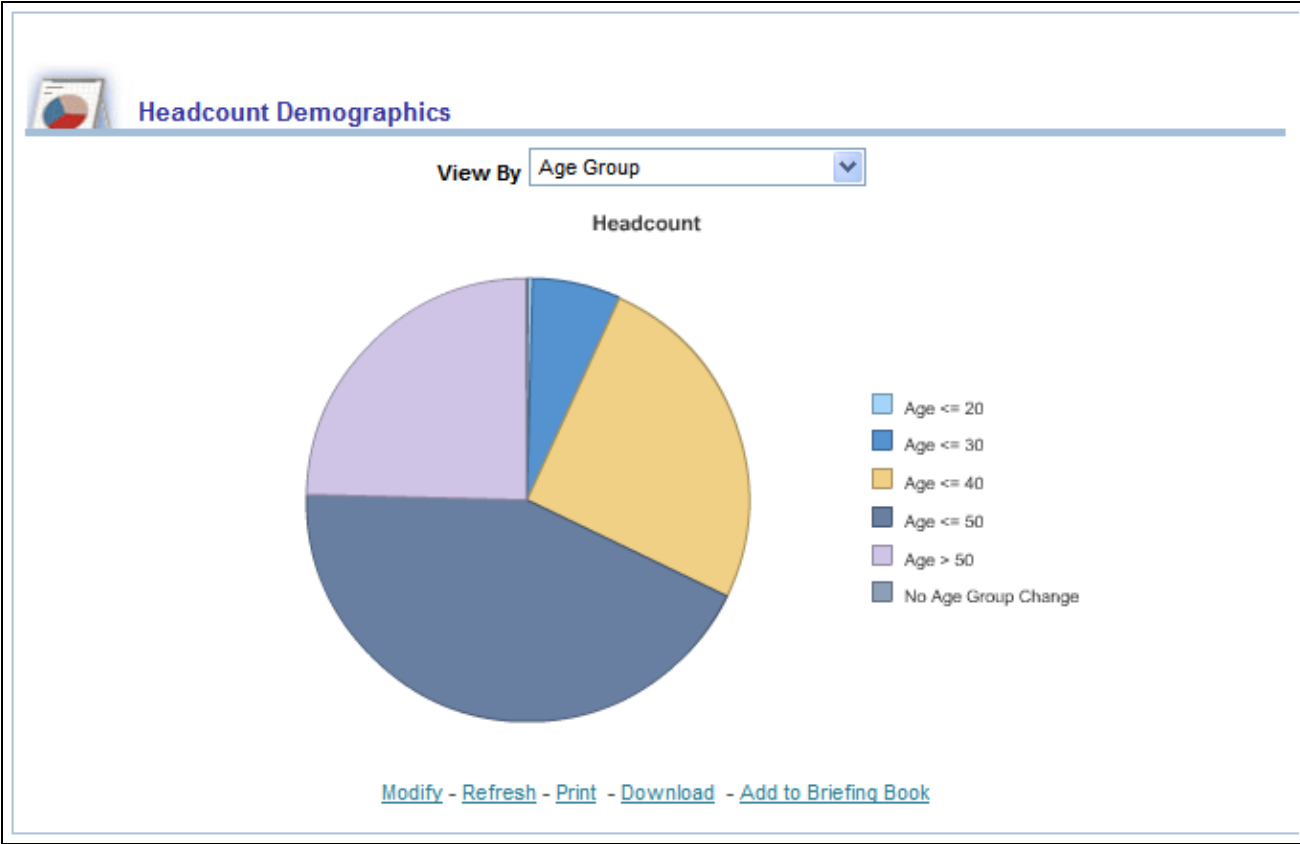


Workforce Demographics page

| Usage   | Reports   | Dashboard Prompt  |
|---|---|---|
| Provides a detailed overview of organization headcount demographics | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Headcount Demographics report</li><li>Headcount Distribution by Job Category report</li><li>Termination Demographics report</li><li>Termination Distribution by Job Category report</li><li>Promotion Demographics report</li><li>Promotion Distribution by Job Category report</li></ul> | <div>Use the Workforce Demographics page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Year</li><li>Quarter</li><li>Month</li><li>Business Unit</li><li>Department Name</li><li>Geography</li></ul> |

## Headcount Demographics Report

Access the Headcount Demographics report, which details headcount by various demographic dimensions such as age, service group, location, and department.



Headcount Demographics Report

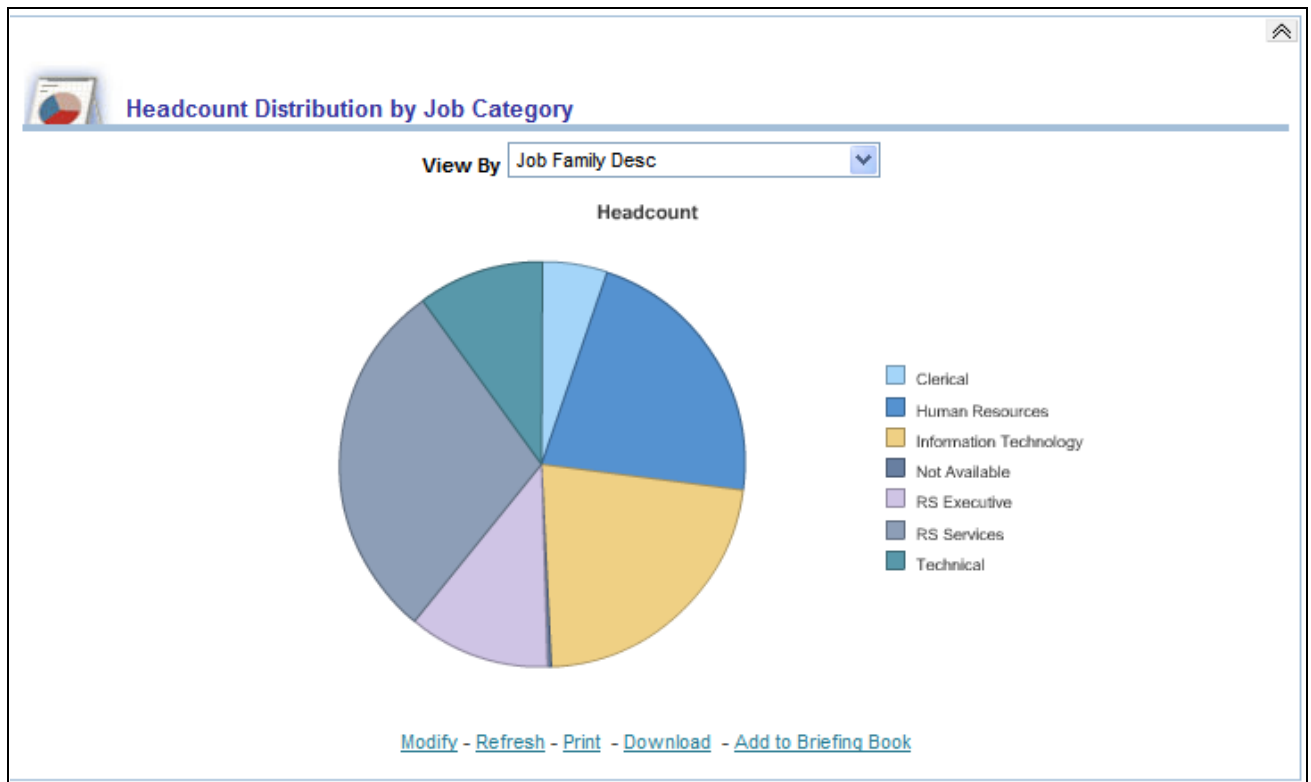
| Pie Chart Data   | View By Filter   |
|--|--|
| <p>The Headcount Demographics pie chart displays <i>Headcount</i> data grouped by <i>Age Group</i>.</p> <p>Headcount data can also be grouped by any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"><li><i>Fairlabor Standards Act Status</i></li><li><i>Service Group</i></li><li><i>Location</i></li><li><i>Department Name</i></li><li><i>Age Group</i> (default)</li></ul> <p><b>Note.</b> You can click on a pie slice to drill down to headcount data for a particular dimension (such as location).</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li><i>Fairlabor Standards Act Status</i></li><li><i>Service Group</i></li><li><i>Location</i></li><li><i>Department Name</i></li><li><i>Age Group</i> (default)</li></ul> |

The following table lists the columns and measures used in the Headcount Demographics report.

| Report Column / Measure Name   | Report Column / Measure Origin                            |
|--------------------------------|---|
| Age Group                      | Age Group (D_AGRGRP_VW) Dimension<br>(D_DURATION)         |
| Fairlabor Standards Act Status | Employee Job (D_EMPL_JOB) Dimension                       |
| Service Group                  | Service Group (D_SERVICEGRP_VW) Dimension<br>(D_DURATION) |
| Department                     | Department (D_DEPT) Dimension                             |
| Location                       | Location (D_LOCATION) Dimension                           |
| Headcount                      | Workforce (F_WORKFORCE) Fact                              |

## Headcount Distribution by Job Category Report

Access the Headcount Distribution by Job Category report, which details employee headcount distribution by various job category dimensions such as job code, position, and salary grade.



Headcount Distribution by Job Category Report

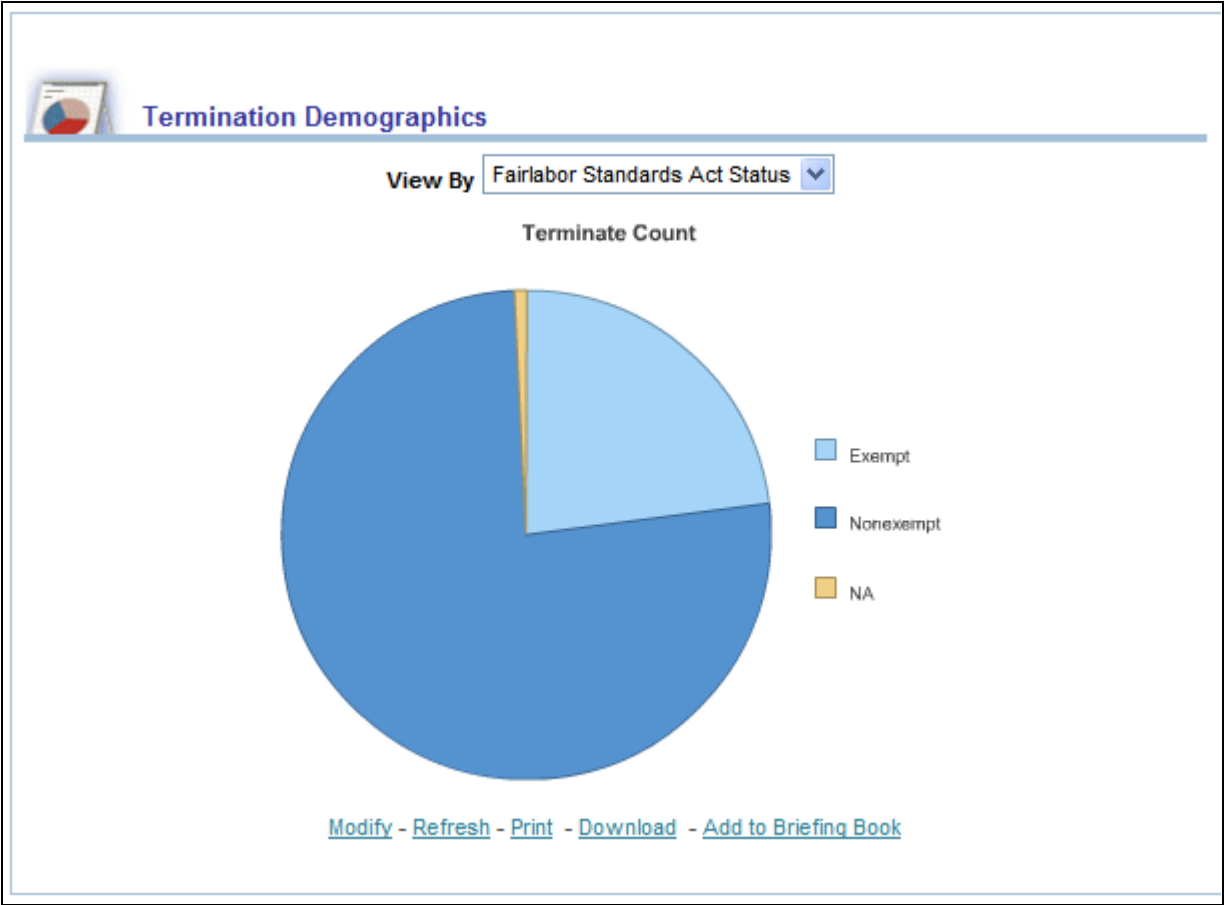
| <b>Pie Chart Data</b>   | <b>View By Filter</b>   |
|---|---|
| <p>The Headcount Distribution by Job Category pie chart displays <i>Headcount</i> data grouped by <i>Job Family Description</i>.</p> <p>Headcount data can also be grouped by any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Equal Employment Opportunity 1 Code</i></li> <li>• <i>Department Name</i></li> <li>• <i>Job Code</i></li> <li>• <i>Job Family Description</i> (default)</li> <li>• <i>Location</i></li> <li>• <i>Position</i></li> <li>• <i>Salary Grade Group</i></li> </ul> <p><b>Note.</b> You can click on a pie slice to drill down to head count data for a particular dimension (such as location).</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Equal Employment Opportunity 1 Code</i></li> <li>• <i>Department Name</i></li> <li>• <i>Job Code</i></li> <li>• <i>Job Family Description</i> (default)</li> <li>• <i>Location</i></li> <li>• <i>Position</i></li> <li>• <i>Salary Grade Group</i></li> </ul> |

The following table lists the columns and measures used in the Headcount Distribution by Job Category report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>                      |
|-------------------------------------|--|
| Equal Employment Opportunity 1 Code | Jobcode (D_JOBCODE) Dimension                              |
| Job Code                            | Employee Job Code (D_EMPL_JOB) Dimension                   |
| Job Family Description              | Jobcode (D_JOBCODE) Dimension                              |
| Position                            | Position (D_POS) Dimension                                 |
| Salary Grade Group                  | Salary Grade Group (D_SALGRDGRP_VW) Dimension (D_DURATION) |
| Department                          | Department (D_DEPT) Dimension                              |
| Location                            | Location (D_LOCATION) Dimension                            |
| Headcount                           | Workforce (F_WORKFORCE) Fact                               |

## Termination Demographics Report

Access the Termination Demographics report, which details employee terminations by various dimensions such as age, department, or service group.



Termination Demographics Report

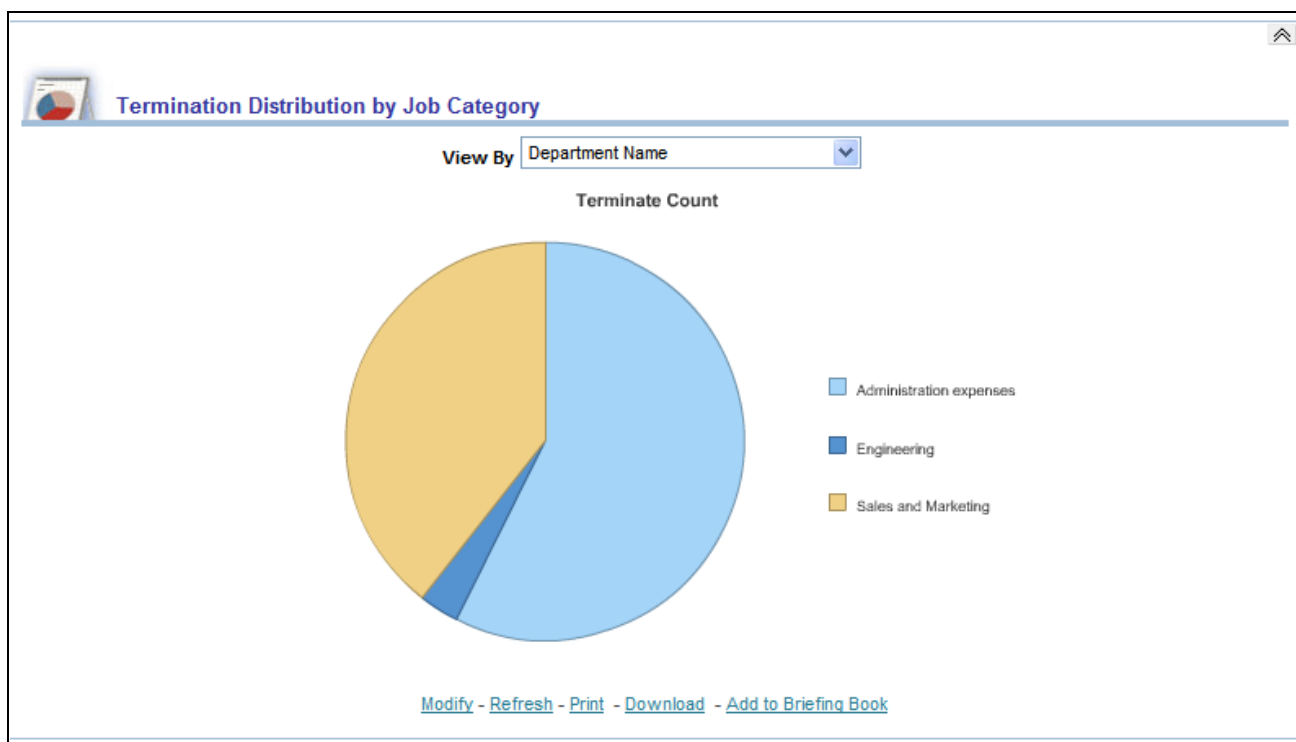
| Pie Chart Data   | View By Filter  |
|--|---|
| <p>The Termination Demographics pie chart displays <i>Termination Count</i> data grouped by <i>Fairlabor Standards Act Status</i>.</p> <p>Termination count data can also be grouped by any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"><li>Age Group</li><li>Department Name</li><li>Location</li><li>Service Group</li><li>Fairlabor Standards Act Status (default)</li></ul> <p><b>Note.</b> You can click on a pie slice to drill down to termination count data for a particular dimension (such as location).</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li>Age Group</li><li>Department Name</li><li>Location</li><li>Service Group</li><li>Fairlabor Standards Act Status (default)</li></ul> |

The following table lists the columns and measures used in the Termination Demographics report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>                     |
|-------------------------------------|---|
| Age Group                           | Age Group (D_AGRGRP_VW) Dimension<br>(D_DURATION)         |
| Fairlabor Standards Act Status      | Employee Job (D_EMPL_JOB) Dimension                       |
| Service Group                       | Service Group (D_SERVICEGRP_VW) Dimension<br>(D_DURATION) |
| Department                          | Department (D_DEPT) Dimension                             |
| Location                            | Location (D_LOCATION) Dimension                           |
| Termination Count                   | Workforce (F_WORKFORCE) Fact                              |

## Termination Distribution by Job Category Report

Access the Termination Distribution by Job Category report, which details employee termination distribution by various job category dimensions such as job code, position, and salary grade.



Termination Distribution by Job Category Report



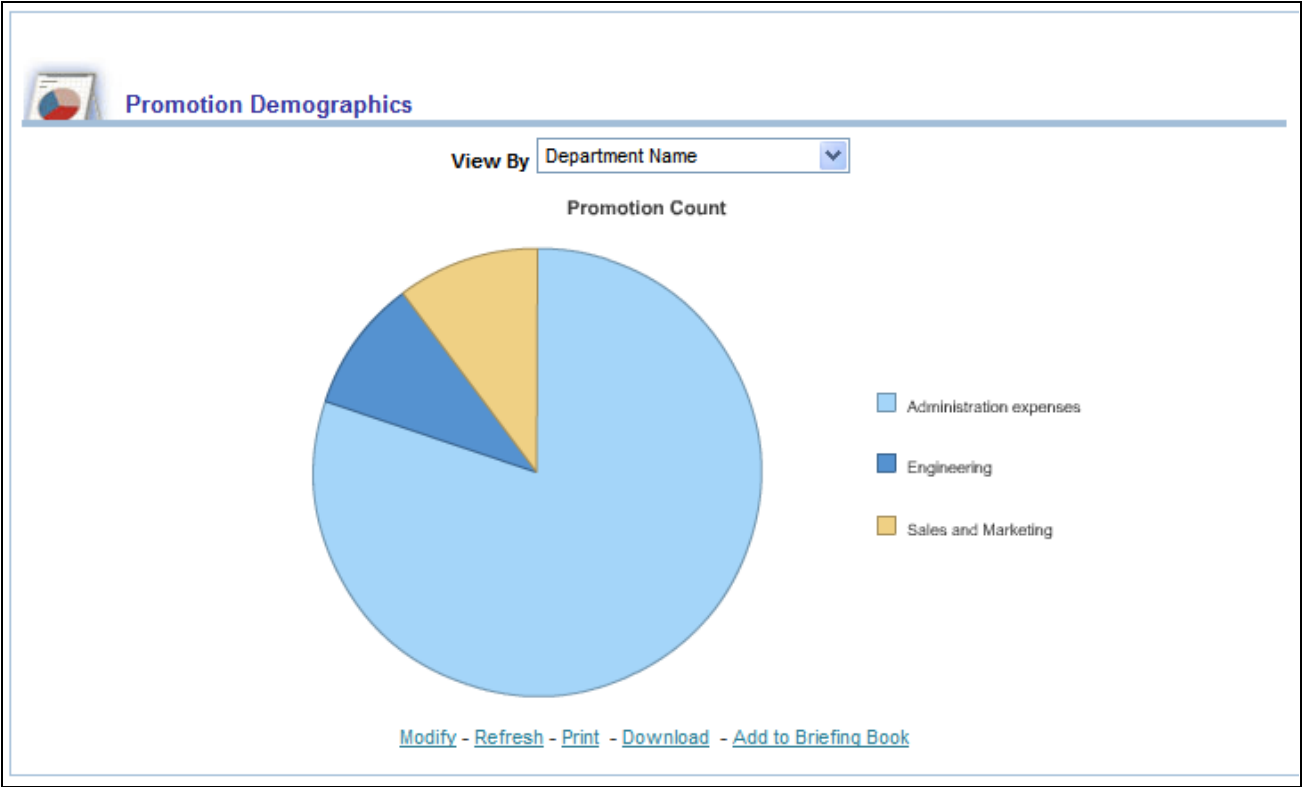
| <b>Pie Chart Data</b>   | <b>View By Filter</b>   |
|---|---|
| <p>The Termination Distribution by Job Category pie chart displays <i>Termination Count</i> data grouped by <i>Department</i>. Termination count data can also be grouped by any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Equal Employment Opportunity 1 Code</i></li> <li>• <i>Department Name</i> (default)</li> <li>• <i>Job Code</i></li> <li>• <i>Job Family Description</i></li> <li>• <i>Location</i></li> <li>• <i>Position</i></li> <li>• <i>Salary Grade Group</i></li> </ul> <p><b>Note.</b> You can click on a pie slice to drill down to termination count data for a particular dimension (such as position).</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Equal Employment Opportunity 1 Code</i></li> <li>• <i>Department Name</i> (default)</li> <li>• <i>Job Code</i></li> <li>• <i>Job Family Description</i> (default)</li> <li>• <i>Location</i></li> <li>• <i>Position</i></li> <li>• <i>Salary Grade Group</i></li> </ul> |

The following table lists the columns and measures used in the Termination Distribution by Job Category report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>                      |
|-------------------------------------|--|
| Equal Employment Opportunity 1 Code | Jobcode (D_JOBCODE) Dimension                              |
| Job Code                            | Employee Job Code (D_EMPL_JOB) Dimension                   |
| Job Family Description              | Jobcode (D_JOBCODE) Dimension                              |
| Position                            | Position (D_POS) Dimension                                 |
| Salary Grade Group                  | Salary Grade Group (D_SALGRDGRP_VW) Dimension (D_DURATION) |
| Department                          | Department (D_DEPT) Dimension                              |
| Location                            | Location (D_LOCATION) Dimension                            |
| Termination Count                   | Workforce (F_WORKFORCE) Fact                               |

## Promotion Demographics Report

Access the Promotion Demographics report, which details employee promotions by various dimensions such as age group, location, or department.



Promotion Demographics Report

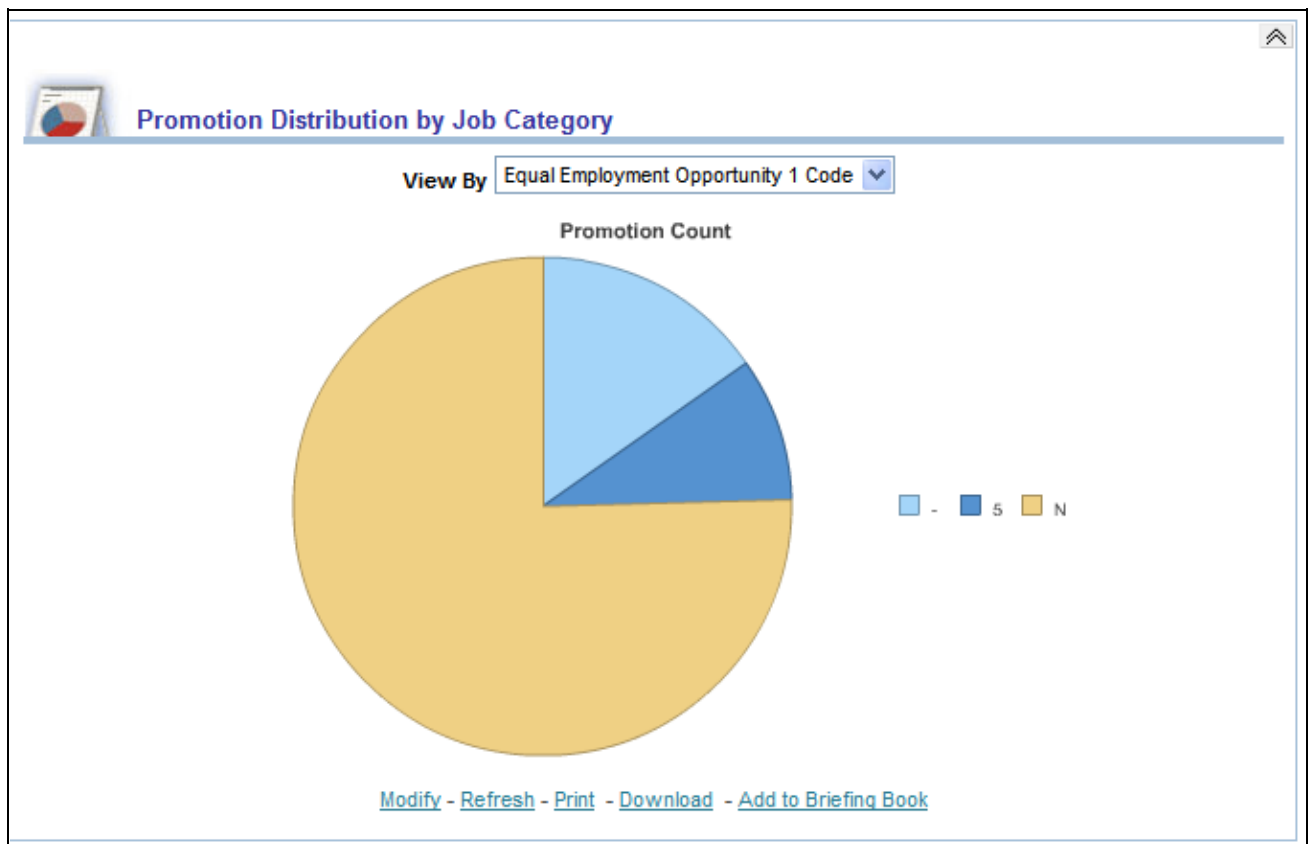
| Pie Chart Data   | View By Filter   |
|--|--|
| <p>The Promotion Demographics pie chart displays <i>Promotion Count</i> data grouped by <i>Department</i>.</p> <p>Promotion count data can also be grouped by any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"><li><i>Fairlabor Standards Act Status</i></li><li><i>Service Group</i></li><li><i>Location</i></li><li><i>Department Name</i> (default)</li><li><i>Age Group</i></li></ul> <p><b>Note.</b> You can click on a pie slice to drill down to promotion count data for a particular dimension (such as age group).</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li><i>Fairlabor Standards Act Status</i></li><li><i>Service Group</i></li><li><i>Location</i></li><li><i>Department Name</i> (default)</li><li><i>Age Group</i></li></ul> |

The following table lists the columns and measures used in the Promotion Demographics report.

| Report Column / Measure Name   | Report Column / Measure Origin                            |
|--------------------------------|---|
| Age Group                      | Age Group (D_AGRGRP_VW) Dimension<br>(D_DURATION)         |
| Fairlabor Standards Act Status | Employee Job (D_EMPL_JOB) Dimension                       |
| Service Group                  | Service Group (D_SERVICEGRP_VW) Dimension<br>(D_DURATION) |
| Department                     | Department (D_DEPT) Dimension                             |
| Location                       | Location (D_LOCATION) Dimension                           |
| Promotion Count                | Workforce (F_WORKFORCE) Fact                              |

## Promotion Distribution by Job Category Report

Access the Promotion Distribution by Job Category report, which details employee promotion distribution by various job category dimensions such as job code, position, and salary grade.



Promotion Distribution by Job Category Report

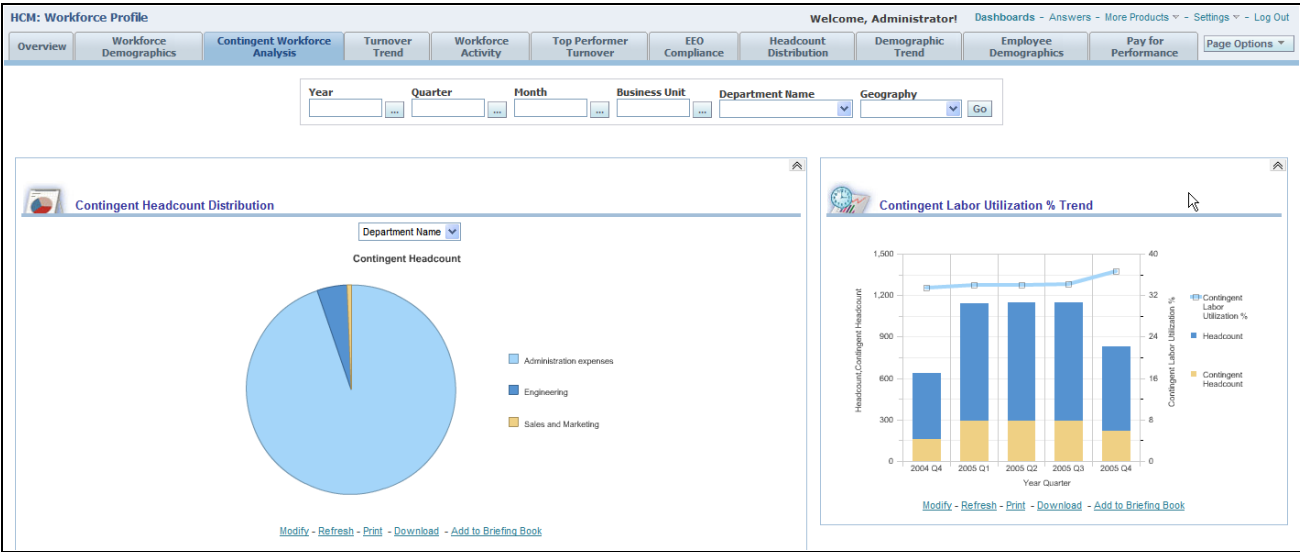
| <b>Pie Chart Data</b>   | <b>View By Filter</b>   |
|---|---|
| <p>The Promotion Distribution by Job Category pie chart displays <i>Promotion Count</i> data grouped by <i>Equal Employment Opportunity 1 Code</i>.</p> <p>Promotion count data can also be grouped by any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Equal Employment Opportunity 1 Code</i> (default)</li> <li>• <i>Department Name</i></li> <li>• <i>Job Code</i></li> <li>• <i>Job Family Description</i></li> <li>• <i>Location</i></li> <li>• <i>Position</i></li> <li>• <i>Salary Grade Group</i></li> </ul> <p><b>Note.</b> You can click on a pie slice to drill down to promotion count data for a particular dimension (such as department).</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Equal Employment Opportunity 1 Code</i> (default)</li> <li>• <i>Department Name</i></li> <li>• <i>Job Code</i></li> <li>• <i>Job Family Description</i></li> <li>• <i>Location</i></li> <li>• <i>Position</i></li> <li>• <i>Salary Grade Group</i></li> </ul> |

The following table lists the columns and measures used in the Promotion Distribution by Job Category report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>                      |
|-------------------------------------|--|
| Equal Employment Opportunity 1 Code | Jobcode (D_JOBCODE) Dimension                              |
| Job Code                            | Employee Job Code (D_EMPL_JOB) Dimension                   |
| Job Family Description              | Jobcode (D_JOBCODE) Dimension                              |
| Position                            | Position (D_POS) Dimension                                 |
| Salary Grade Group                  | Salary Grade Group (D_SALGRDGRP_VW) Dimension (D_DURATION) |
| Department                          | Department (D_DEPT) Dimension                              |
| Location                            | Location (D_LOCATION) Dimension                            |
| Promotion Count                     | Workforce (F_WORKFORCE) Fact                               |

# Using the Workforce Profile Dashboard - Contingent Workforce Analysis Page

Access the Contingent Workforce Analysis page (HCM: Human Capital Management, HCM: Workforce Profile, Contingent Workforce Analysis).

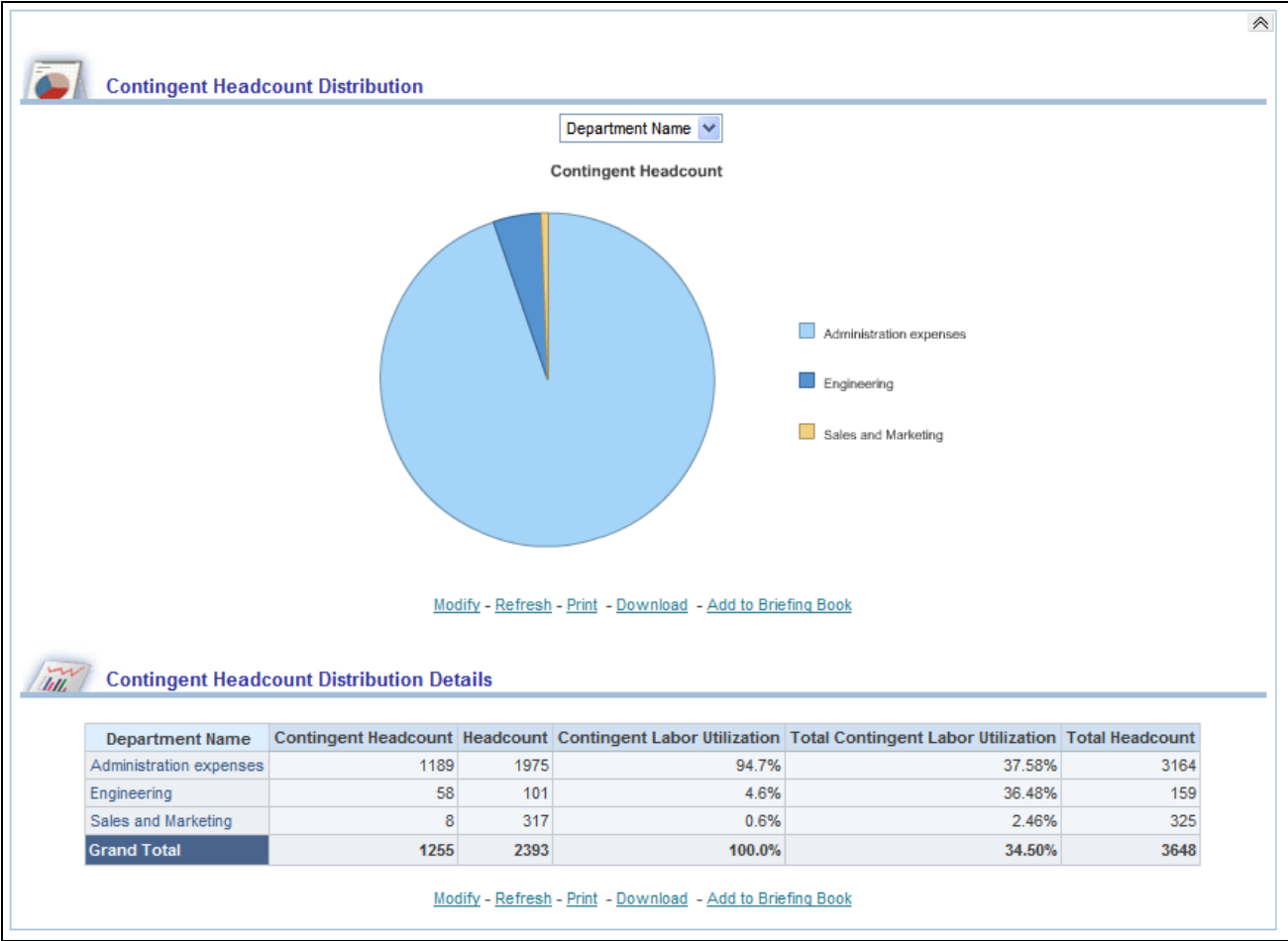


Contingent Workforce Analysis Page

| Usage  | Reports  | Dashboard Prompt   |
|--|--|--|
| Provides an overview of contingent headcount distribution and labor utilization for your organization. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Contingent Headcount Distribution report</li><li>Contingent Labor Utilization % Trend report</li></ul> | <div>Use the Contingent Workforce Analysis page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Year</li><li>Quarter</li><li>Month</li><li>Business Unit</li><li>Department Name</li><li>Geography</li></ul> |

## Contingent Headcount Distribution Report

Access the Contingent Headcount Distribution report, which provides a detailed analysis of contingent headcount distribution by department, geography and job family.



Contingent Headcount Distribution Report

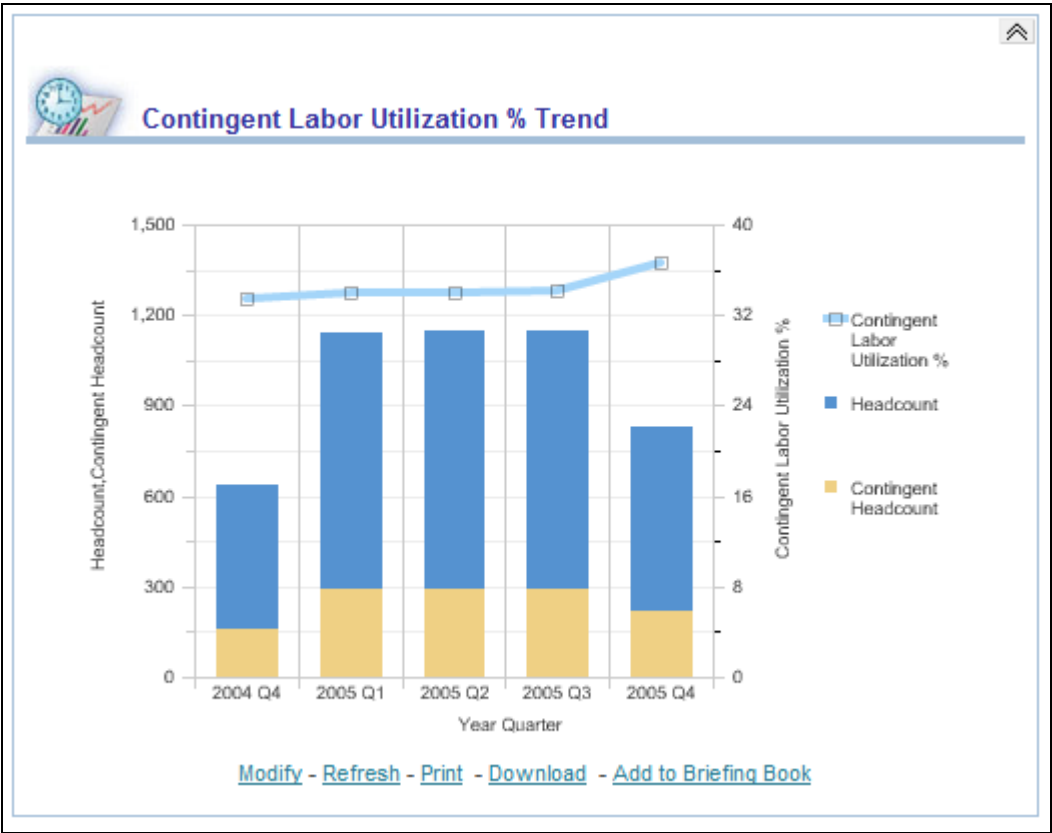
| Pie Chart Data   | View By Filter   |
|--|--|
| <p>The Contingent Headcount Distribution pie chart displays <i>Contingent Headcount</i> data grouped by <i>Department</i>.</p> <p>Contingent headcount data can also be grouped by any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"><li><i>Department</i> (default)</li><li><i>Geography</i></li><li><i>Job Family</i></li></ul> <p><b>Note.</b> You can click on a pie slice to drill down to contingent headcount data for a particular dimension (such as geography).</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li><i>Department</i> (default)</li><li><i>Geography</i></li><li><i>Job Family</i></li></ul> |

The following table lists the columns and measures used in the Contingent Headcount Distribution report.

| <b>Report Column / Measure Name</b>          | <b>Report Column / Measure Origin</b>                                   |
|--|---|
| Department                                   | Department (D_DEPT) Dimension   |
| Geography                                    | Geography (D_GEOGRAPHY) Dimension                                       |
| Job Family Description                       | Jobcode (D_JOBCODE) Dimension   |
| Contingent Headcount                         | Workforce (F_WORKFORCE) Fact  |
| Headcount                                    | Workforce (F_WORKFORCE) Fact  |
| Total Headcount                              | Workforce (F_WORKFORCE) Fact  |
| Contingent Labor Utilization (percent)       | Workforce (F_WORKFORCE) Fact:   |
| Total Contingent Labor Utilization (percent) | Workforce (F_WORKFORCE) Fact:<br>Contingent Headcount / Total Headcount |

## Contingent Labor Utilization % Trend Report

Access the Contingent Labor Utilization % Trend report, which details labor utilization percentages, headcount, and contingent headcount trends by quarter.



Contingent Labor Utilization % Trend Report

The Contingent Labor Utilization % Trend graph displays *Year* and *Quarter* data on the x-axis and *Headcount*, *Contingent Headcount* and *Contingent Labor Utilization %* data on the y-axis.

**Note.** You can click on graph data to review drill down data for a particular year and quarter.

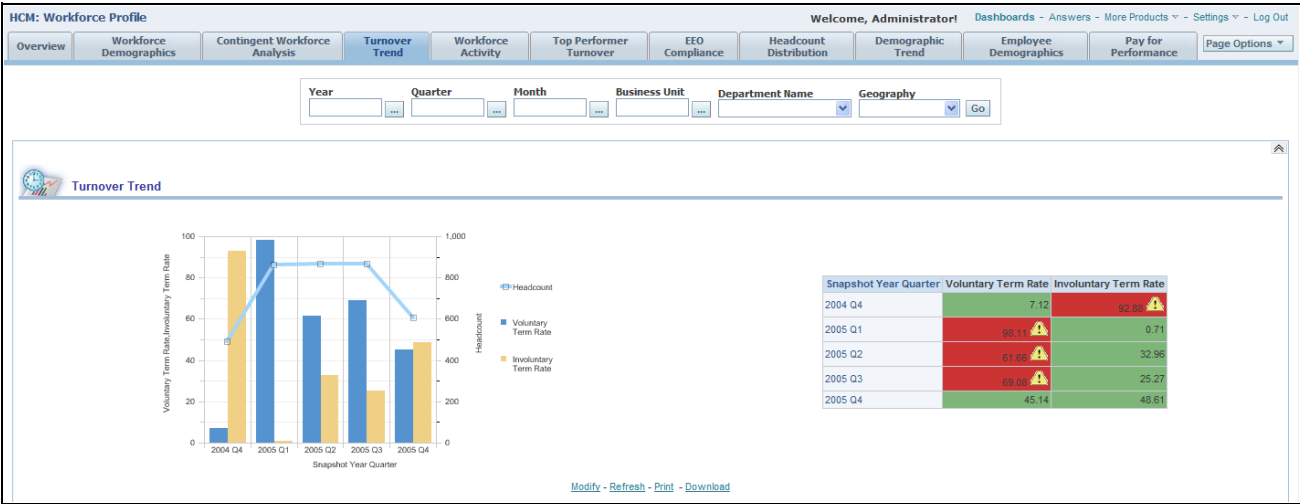
The following table lists the columns and measures used in the Contingent Labor Utilization % Trend report.

| Report Column / Measure Name   | Report Column / Measure Origin |
|--------------------------------|--------------------------------|
| Year                           | Day (D_DAY) Dimension          |
| Quarter                        | Day (D_DAY) Dimension          |
| Contingent Headcount           | Workforce (F_WORKFORCE) Fact   |
| Headcount                      | Workforce (F_WORKFORCE) Fact   |
| Contingent Labor Utilization % | Workforce (F_WORKFORCE) Fact   |



# Using the Workforce Profile Dashboard - Turnover Trend Page

Access the Turnover Trend page (HCM: Human Capital Management, HCM: Workforce Profile, Turnover Trend).

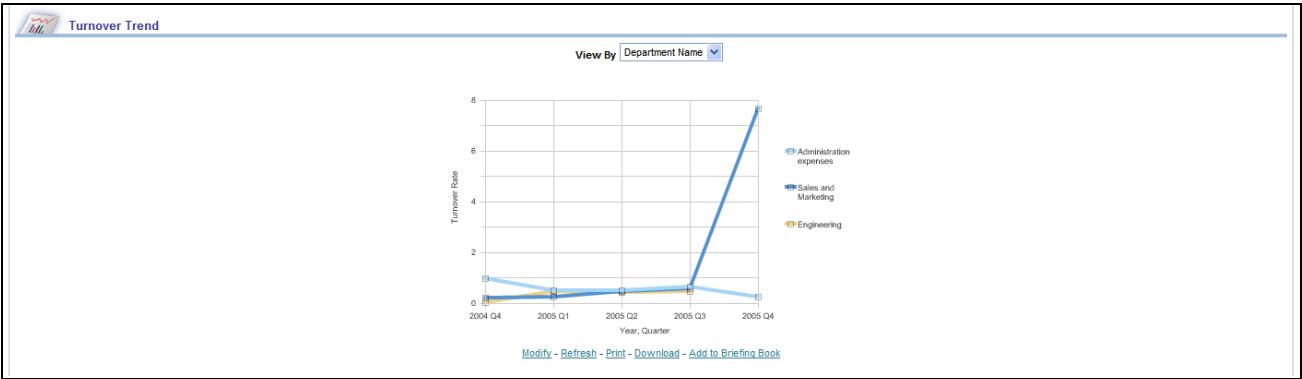


Turnover Trend Page

| Usage  | Reports  | Dashboard Prompt  |
|--|--|---|
| Provides an overview of turnover and position-change trends for your organization. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Turnover Trend report</li><li>Position Change Trends report</li><li>Termination Detail report</li><li>Termination Root Cause report</li><li>Top Performer Turnover Trend report</li><li>Turnover Distribution Analysis report</li><li>Turnover Demographics report</li></ul> | <div>Use the Turnover Trend page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Year</li><li>Quarter</li><li>Month</li><li>Business Unit</li><li>Department Name</li><li>Geography</li></ul> |

## Turnover Trend Report

Access the Turnover Trend report, which details employee turnover trend by voluntary term rate and involuntary term rate by quarter.



Turnover Trend Report

The Turnover Trend graph displays *Snapshot Year* and *Snapshot Quarter* data on the x-axis and *Headcount*, *Voluntary Term Rate*, and *Involuntary Term Rate* data on the y-axis.

**Note.** You can click on graph data to review drill down data for a particular year and quarter.

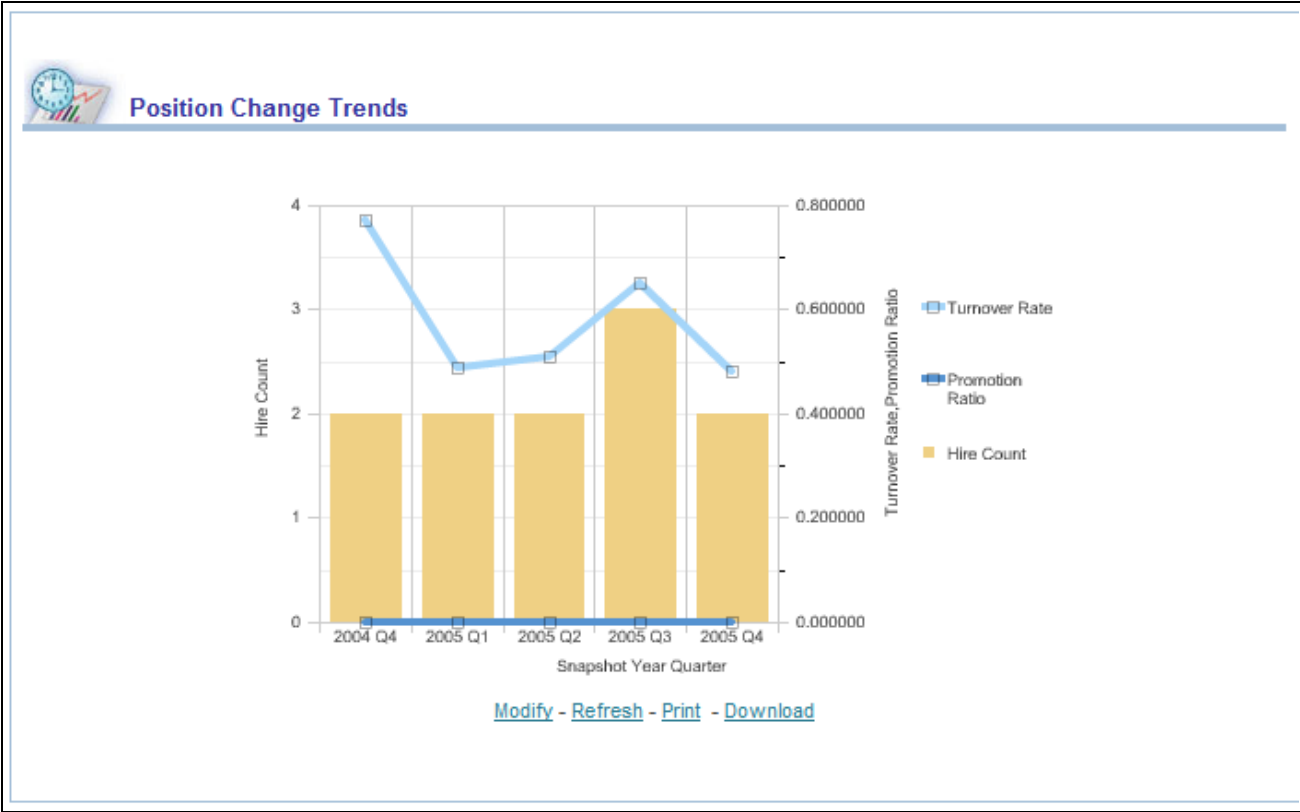
The following table lists the columns and measures used in the Turnover Trend report.

| Report Column / Measure Name | Report Column / Measure Origin   |
|------------------------------|--|
| Snapshot Year                | Day (D_DAY) Dimension  |
| Snapshot Quarter             | Day (D_DAY) Dimension  |
| Headcount                    | Workforce (F_WORKFORCE) Fact   |
| Voluntary Count              | Workforce (F_WORKFORCE) Fact   |
| Involuntary Count            | Workforce (F_WORKFORCE) Fact   |
| Voluntary Term Rate          | Workforce (F_WORKFORCE) Fact<br><br>This measure is calculated by dividing the sum of Voluntary count by sum of Terminate count when terminate count not equal to 0:<br><br>Case when [(IF Fact Workforce.TERMINATE_COUNT <> 0 AND Dimension Action.WA_VOLUNTARY_FLAG = 'V' then Fact Workforce.TERMINATE_COUNT else 0) * 100 / nullif (Fact Workforce.TERMINATE_COUNT,0)] else 0. |

| Report Column / Measure Name | Report Column / Measure Origin   |
|------------------------------|--|
| Involuntary Term Rate        | Workforce (F_WORKFORCE) Fact<br><br>This measure is calculated by dividing sum of Involuntary count by sum of Termination count when terminate count not equal to 0:<br><br>Case when [(IF Fact Workforce.TERMINATE_COUNT <> 0 AND Dimension Action.WA_VOLUNTARY_FLAG = 'T' then Fact Workforce.TERMINATE_COUNT else 0) * 100 / nullif (Fact Workforce.TERMINATE_COUNT,0)] else 0. |

Position Change Trends Report

Access the Position Change Trends report, which details turnover rates, promotion ratio, and hire count by quarter.



Position Change Trends Report

The Position Change Trends graph displays *Snapshot Year* and *Snapshot Quarter* data on the x-axis and *Hire Count*, *Turnover Rate*, and *Promotion Ratio* data on the y-axis.

**Note.** You can click on graph data to review drill down data for a particular year and quarter.

The following table lists the columns and measures used in the Position Change Trends report.

| Report Column / Measure Name | Report Column / Measure Origin   |
|------------------------------|--|
| Snapshot Year                | Day (D_DAY) Dimension  |
| Snapshot Quarter             | Day (D_DAY) Dimension  |
| Headcount                    | Workforce (F_WORKFORCE) Fact   |
| Turnover Rate                | Workforce (F_WORKFORCE) Fact:<br>Total Termination Count * (100 / Total Headcount) |
| Promotion Ratio              | Workforce (F_WORKFORCE) Fact<br>Promotion Count / Total Headcount                  |

## Termination Detail Report

Access the Termination Detail report, which details both voluntary term rate and involuntary term rate by age group, job function, service group, and appraisal review rating.



Termination Detail Report

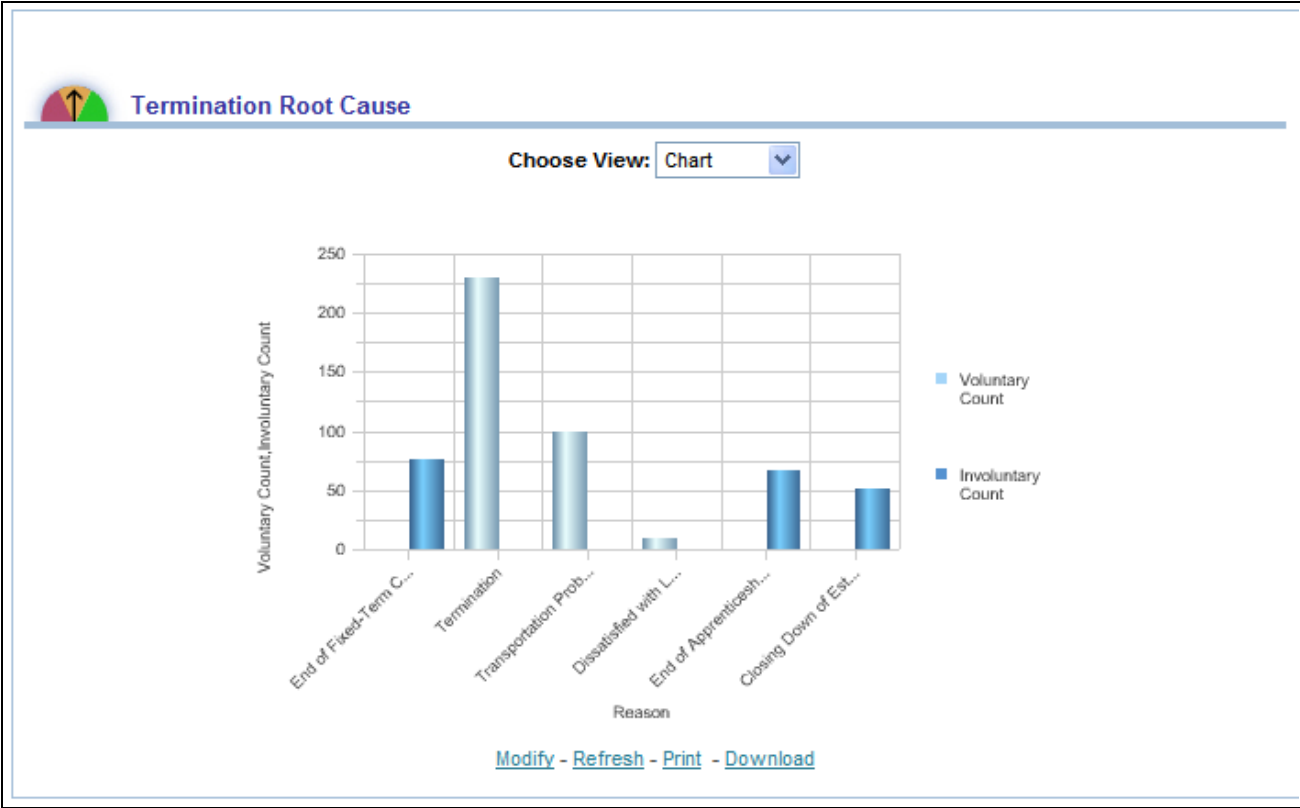
| <b><i>X,Y Axis Data</i></b>   | <b><i>View By Filter</i></b>  |
|---|---|
| <p>The Termination Detail graph displays <i>Age Group</i> data on the x-axis and <i>Voluntary Count</i> and <i>Involuntary Count</i> data on the y-axis.</p> <p>The x-axis can also display any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Job Function</i></li> <li>• <i>Appraisal Review Rating</i></li> <li>• <i>Service Group</i></li> <li>• <i>Age Group</i> (default)</li> </ul> <p><b>Note.</b> You can on graph data to review drill down data for a particular dimension (such as job function).</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Job Function</i></li> <li>• <i>Appraisal Review Rating</i></li> <li>• <i>Service Group</i></li> <li>• <i>Age Group</i> (default)</li> </ul> |

The following table lists the columns and measures used in the Termination Detail report.

| <b><i>Report Column / Measure Name</i></b> | <b><i>Report Column / Measure Origin</i></b>              |
|--|---|
| Job Function                               | Jobcode (D_JOBCODE) Dimension                             |
| Appraisal Review Rating                    | Employee Appraisal (D_EMPL_APRSL) Dimension               |
| Service Group                              | Service Group (D_SERVICEGRP_VW) Dimension<br>(D_DURATION) |
| Age Group                                  | Age Group (D_AGRGRP_VW) Dimension<br>(D_DURATION)         |
| Voluntary Count                            | Workforce (F_WORKFORCE) Fact                              |
| Involuntary Count                          | Workforce (F_WORKFORCE) Fact                              |

## Termination Root Cause Report

Access the Termination Root Cause report, which enables you to analyze root causes of termination across your organization and the action taken.



Termination Root Cause Report

| X,Y Axis Data   | Choose View Filter   |
|---|--|
| <p>In chart view, the Termination Root Cause graph displays <i>Reason</i> data on the x-axis and <i>Voluntary Count</i> and <i>Involuntary Count</i> data on the y-axis.</p> <p>In pivot table view, the same data is displayed in table format, but includes the addition of <i>Department</i> data.</p> | <p>Use this filter to view report results in chart format or pivot table format.</p> |

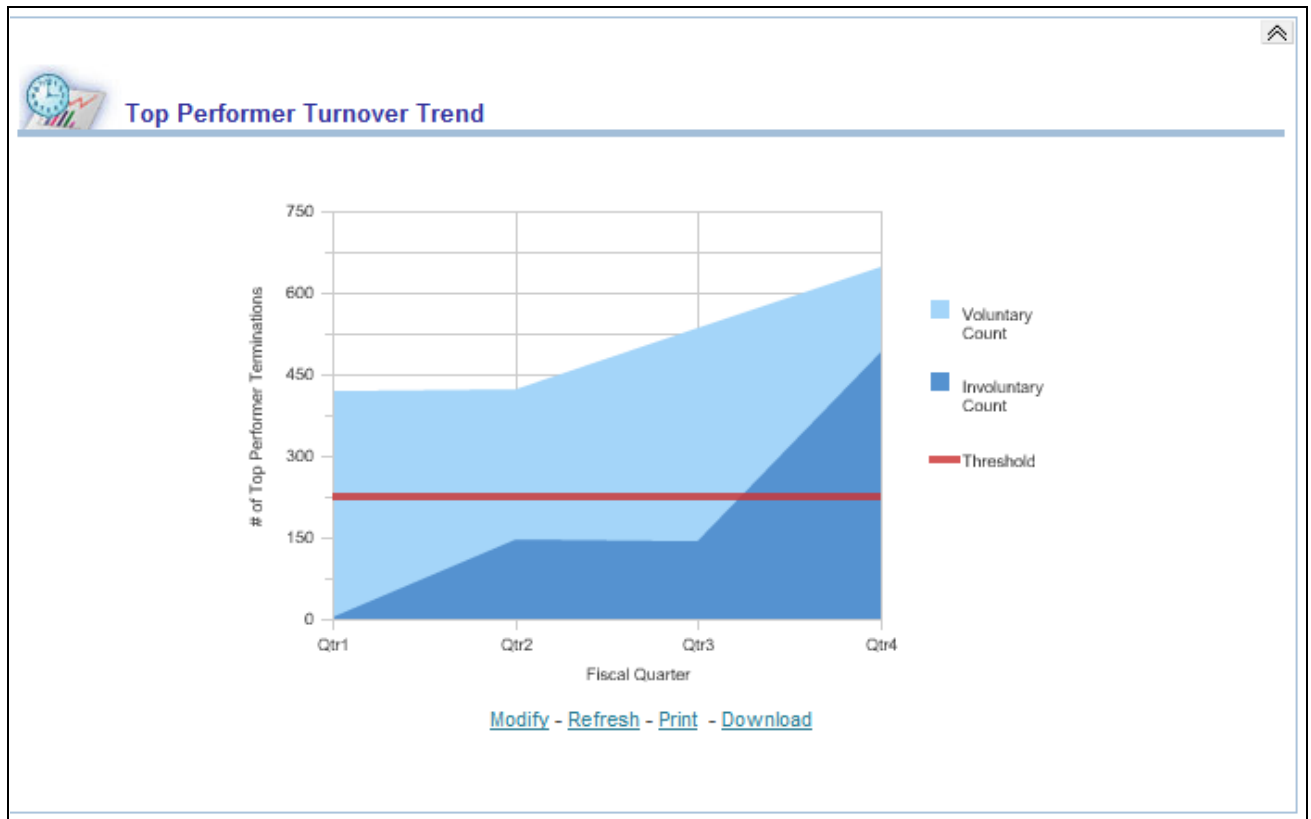
The following table lists the columns and measures used in the Termination Root Cause report.

| Report Column / Measure Name | Report Column / Measure Origin         |
|------------------------------|--|
| Person                       | Person (D_PERSON) Dimension            |
| Position                     | Position (D_POS) Dimension             |
| Action                       | Action (D_WA_ACTION) Dimension         |
| Department                   | Department (D_DEPT) Dimension          |
| Reason                       | Response Reason (D_RESP_RSN) Dimension |
| Voluntary Count              | Workforce (F_WORKFORCE) Fact           |

| Report Column / Measure Name | Report Column / Measure Origin |
|------------------------------|--------------------------------|
| Involuntary Count            | Workforce (F_WORKFORCE) Fact   |

## Top Performer Turnover Trend Report

Access the Top Performer Turnover Trend report, which enables you to analyze voluntary and involuntary turnover trends for your top performers across your organization.



### Top Performer Turnover Trend Report

The Top Performer Turnover Trend graph displays *Fiscal Quarter* data on the x-axis and *Voluntary Count*, *Involuntary Count* and *Total Number of Top Performer Termination Count* data on the y-axis.

**Note.** You define the report threshold value in the chart view of the report. In chart view, click *Axis Scaling*. In the new window click *Edit Scale Markers*. In the new window, edit the threshold value per your business requirements.

The following table lists the columns and measures used in the Top Performer Turnover Trend report.

| Report Column / Measure Name | Report Column / Measure Origin |
|------------------------------|--------------------------------|
| Fiscal Quarter               | Day (D_DAY) Dimension          |
| Voluntary Count              | Workforce (F_WORKFORCE) Fact   |

| Report Column / Measure Name              | Report Column / Measure Origin |
|---|--------------------------------|
| Involuntary Count                         | Workforce (F_WORKFORCE) Fact   |
| Total Number of Top Performer Termination | Workforce (F_WORKFORCE) Fact   |

Turnover Distribution Analysis Report

Access the Turnover Distribution Analysis report, which details both voluntary term counts and involuntary term counts by fiscal year and department.



Turnover Distribution Analysis Report

The Turnover Distribution Analysis graph displays *Fiscal Year* data on the x-axis and *Voluntary Count* and *Involuntary Count* data on the y-axis.

**Note.** You can click on graph data to review drill down data for a particular year.

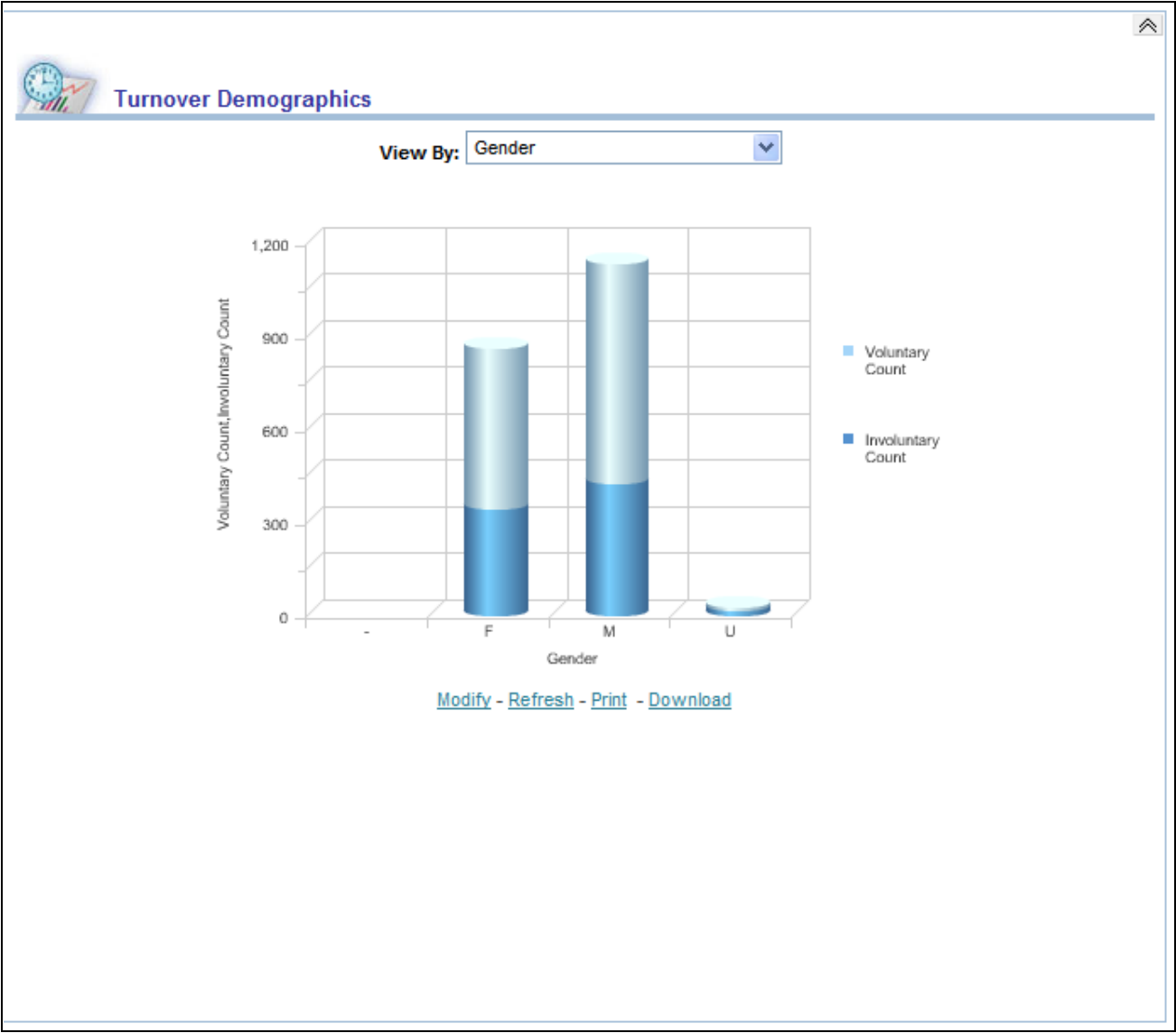


The following table lists the columns and measures used in the Turnover Distribution Analysis report.

| <b><i>Report Column / Measure Name</i></b> | <b><i>Report Column / Measure Origin</i></b> |
|--|--|
| Fiscal Year                                | Day (D_DAY) Dimension                        |
| Department                                 | Department (D_DEPT) Dimension                |
| Voluntary Count                            | Workforce (F_WORKFORCE) Fact                 |
| Involuntary Count                          | Workforce (F_WORKFORCE) Fact                 |

## Turnover Demographics Report

Access the Turnover Demographics report, which enables you to analyze employee turnover by demographic, such as gender or age.



Turnover Demographics Report

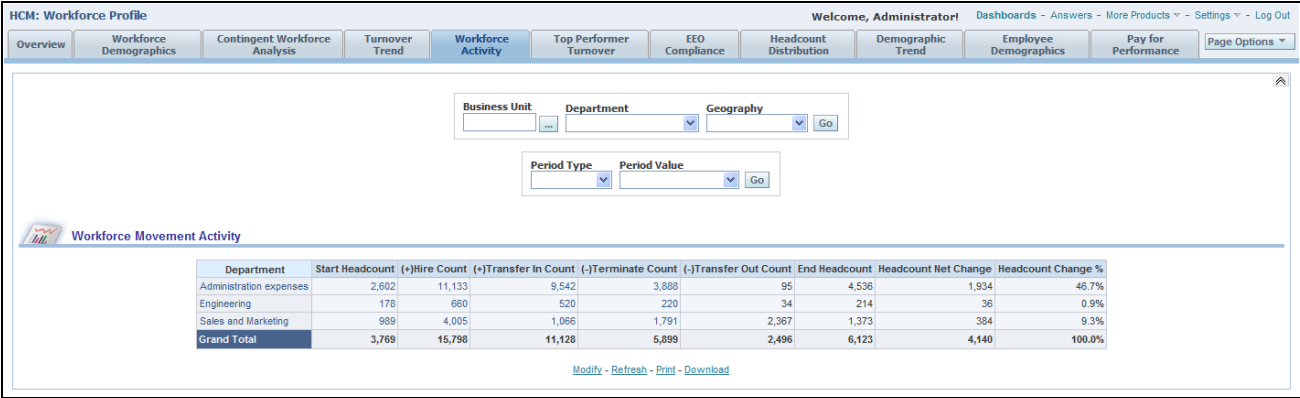
| <b>X,Y Axis Data</b>  | <b>View By Filter</b>  |
|---|--|
| <p>The Turnover Demographics graph displays <i>Gender</i> data on the x-axis and <i>Voluntary Count</i> and <i>Involuntary Count</i> data on the y-axis.</p> <p>The x-axis can also display any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Employee Type</i></li> <li>• <i>Position Security Clearance Code</i></li> <li>• <i>Age</i></li> <li>• <i>Employee High Potential Flag</i></li> <li>• <i>Ethnic Group</i></li> <li>• <i>Gender</i> (default)</li> </ul> <p><b>Note.</b> You can click on graph data to review drill down data for a particular dimension (such as gender or age).</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Employee Type</i></li> <li>• <i>Position Security Clearance Code</i></li> <li>• <i>Age</i></li> <li>• <i>Employee High Potential Flag</i></li> <li>• <i>Ethnic Group</i></li> <li>• <i>Gender</i> (default)</li> </ul> |

The following table lists the columns and measures used in the Turnover Demographics report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>  |
|-------------------------------------|--|
| Employee Type                       | Employee Job Code (D_EMPL_JOB) Dimension   |
| Age                                 | Person (D_PERSON) Dimension  |
| Ethnic Group                        | Person (D_PERSON) Dimension  |
| Gender                              | Person (D_PERSON) Dimension  |
| Position Security Clearance Code    | Position (D_POS) Dimension   |
| Employee High Potential Flag        | <p>This flag uses a <i>Y</i> or <i>N</i> value, based on Higher Education Level Code (HI_EDU_LVL_CD) values, which include:</p> <ul style="list-style-type: none"> <li>• <i>J</i> (Doctorate Academic)</li> <li>• <i>K</i> (Doctorate Professional)</li> <li>• <i>L</i> (Post Doctorate)</li> </ul> <p>If HI_EDU_LVL_CD value = J, K or L, then Employee High Potential Flag is set to Y. Otherwise, the flag is set to N.</p> |
| Voluntary Count                     | Workforce (F_WORKFORCE) Fact   |
| Involuntary Count                   | Workforce (F_WORKFORCE) Fact   |

## Using the Workforce Profile Dashboard - Workforce Activity Page

Access the Workforce Activity page (HCM: Human Capital Management, HCM: Workforce Profile, Workforce Activity).



Workforce Activity Page

| Usage  | Dashboard Prompt   |
|--|--|
| Provides you with an overview of workforce movement for your organization, such as new hires, transfers, and terminations. | <div>Use the Workforce Activity page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>• Business Unit</li><li>• Department</li><li>• Geography</li><li>• Period Type</li><li>• Period Value</li></ul> |

## Workforce Movement Activity Report

Access the Workforce Movement Activity report, which enables you to track workforce movement within your organization, such as new hires, transfers, and terminations.

| Workforce Movement Activity |                 |               |                      |                    |                       |               |                      |                    |  |
|-----------------------------|-----------------|---------------|----------------------|--------------------|-----------------------|---------------|----------------------|--------------------|--|
| Department                  | Start Headcount | (+)Hire Count | (+)Transfer In Count | (-)Terminate Count | (-)Transfer Out Count | End Headcount | Headcount Net Change | Headcount Change % |  |
| Administration expenses     | 2,602           | 11,133        | 9,542                | 3,888              | 95                    | 4,536         | 1,934                | 46.7%              |  |
| Engineering                 | 178             | 660           | 520                  | 220                | 34                    | 214           | 36                   | 0.9%               |  |
| Sales and Marketing         | 989             | 4,005         | 1,066                | 1,791              | 2,367                 | 1,373         | 384                  | 9.3%               |  |
| <b>Grand Total</b>          | <b>3,769</b>    | <b>15,798</b> | <b>11,128</b>        | <b>5,899</b>       | <b>2,496</b>          | <b>6,123</b>  | <b>4,140</b>         | <b>100.0%</b>      |  |

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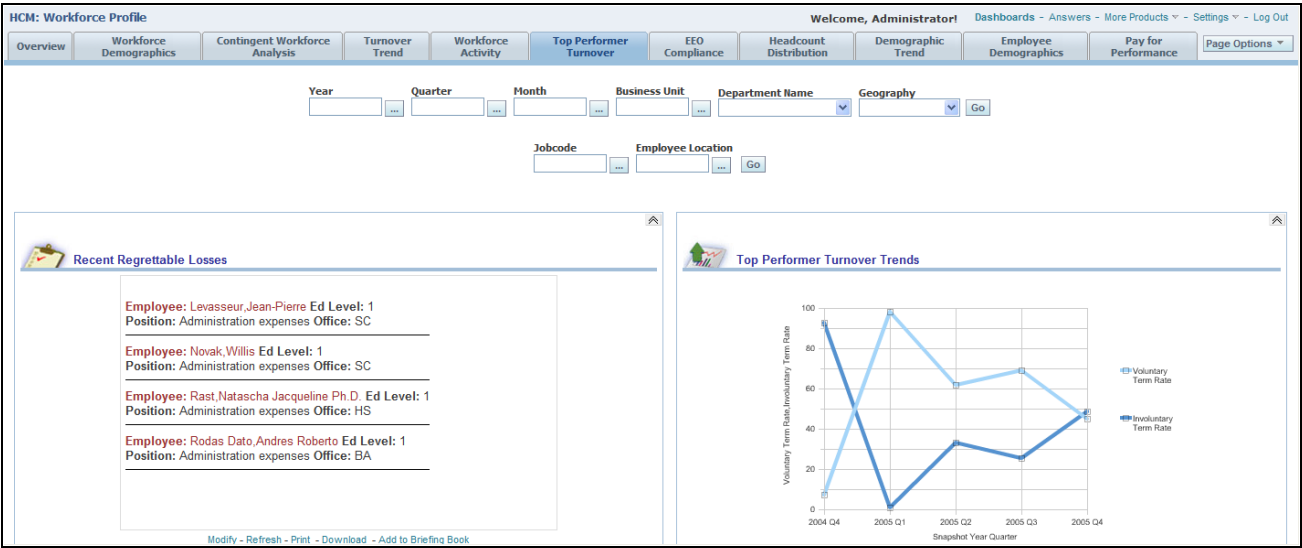
### Workforce Movement Activity Report

The following table lists the columns and measures used in the Workforce Movement Activity report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>   |
|-------------------------------------|---|
| Department                          | Department (D_DEPT) Dimension   |
| Start Headcount                     | Workforce (F_WORKFORCE) Fact  |
| End Headcount                       | Workforce (F_WORKFORCE) Fact  |
| Hire Count                          | Recruitment (F_RCMNT) Fact  |
| Transfer in Count                   | Workforce Activity (F_WORKFORCE_ACT) Fact   |
| Transfer out Count                  | Workforce Activity (F_WORKFORCE_ACT) Fact   |
| Termination Count                   | Workforce (F_WORKFORCE) Fact  |
| Headcount Net Change                | Workforce Activity (F_WORKFORCE_ACT) Fact   |
| Headcount Change Percent            | Workforce Activity (F_WORKFORCE_ACT) Fact:<br>(Headcount Net Change / Grand Total Headcount Net Change) * 100 |

## Using the Workforce Profile Dashboard - Top Performer Turnover Page

Access the Top Performer Turnover page (HCM: Human Capital Management, HCM: Workforce Profile, Top Performer Turnover).




Top Performer Turnover Page

| Usage   | Reports  | Dashboard Prompt   |
|---|--|--|
| Provides an overview of key turnover metrics for top performers in your organization, such as recent losses and trends. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>Recent Regrettable Losses report</li><li>Top Performer Turnover Trends report</li><li>Top Performer At Risk report</li></ul> | <p>Use the Top Performer Turnover page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Year</li><li>Quarter</li><li>Month</li><li>Business Unit</li><li>Department Name</li><li>Geography</li><li>Job Code</li><li>Employee Location</li></ul> |

Recent Regrettable Losses Report

Access the Recent Regrettable Losses report, which displays information about employees that have recently left the organization.



Recent Regrettable Losses

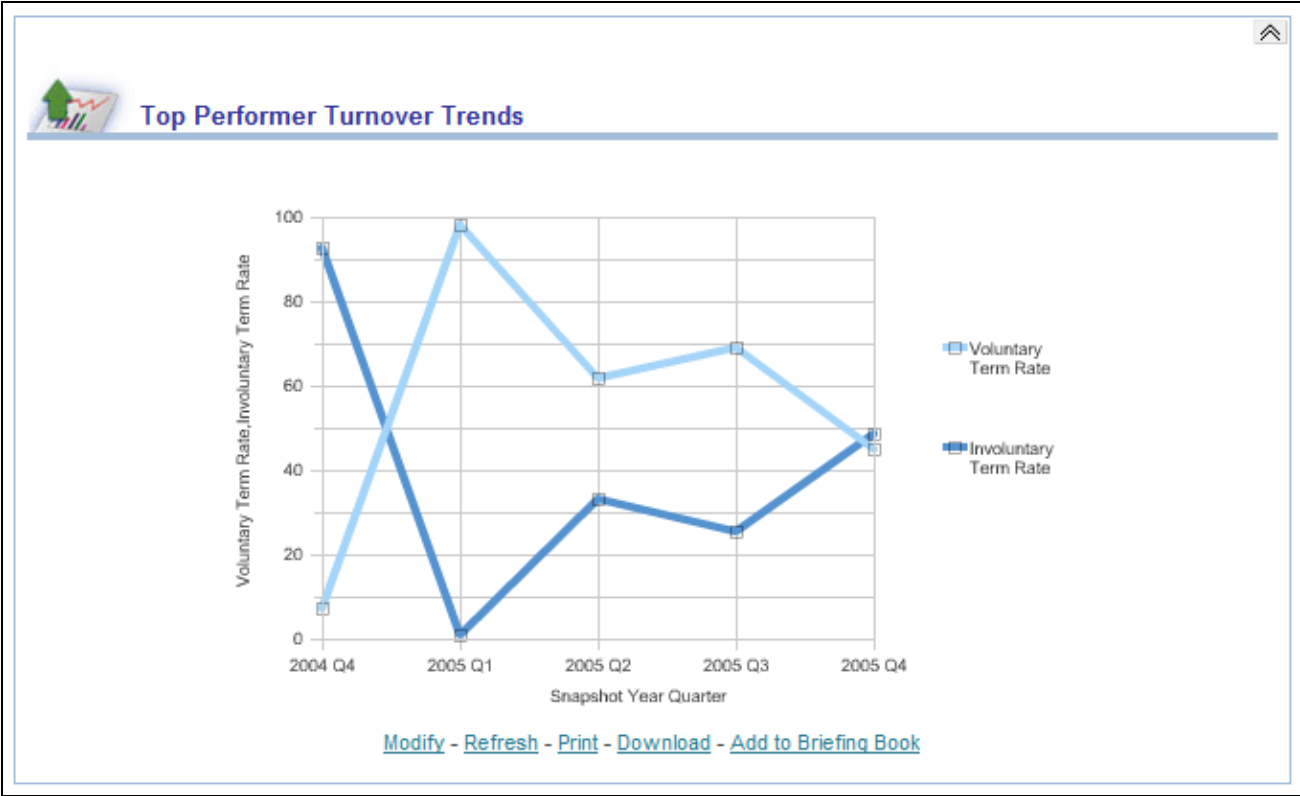
|  |
|--|
| <b>Employee:</b> Levasseur,Jean-Pierre <b>Ed Level:</b> 1<br><b>Position:</b> Administration expenses <b>Office:</b> SC          |
| <b>Employee:</b> Novak,Willis <b>Ed Level:</b> 1<br><b>Position:</b> Administration expenses <b>Office:</b> SC                   |
| <b>Employee:</b> Rast,Natascha Jacqueline Ph.D. <b>Ed Level:</b> 1<br><b>Position:</b> Administration expenses <b>Office:</b> HS |
| <b>Employee:</b> Rodas Dato,Andres Roberto <b>Ed Level:</b> 1<br><b>Position:</b> Administration expenses <b>Office:</b> BA      |

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Recent Regrettable Losses Report

## Top Performer Turnover Trends Report

Access the Top Performer Turnover Trends report, which details trending of both voluntary term rate and involuntary term rate of your top performers.



Top Performer Turnover Trends Report

The Top Performer Turnover Trends graph displays *Snapshot Year* and *Snapshot Quarter* data on the x-axis and *Voluntary Term Rate* and *Involuntary Term Rate* data on the y-axis.

**Note.** You can click on graph data to review drill down data for a particular year or quarter.

The following table lists the columns and measures used in the Top Performer Turnover Trends report.

| Report Column / Measure Name | Report Column / Measure Origin   |
|------------------------------|--|
| Snapshot Year                | Day (D_DAY) Dimension  |
| Snapshot Quarter             | Day (D_DAY) Dimension  |
| Voluntary Term Rate          | Workforce (F_WORKFORCE) Fact<br><br>This measure is calculated by dividing the sum of Voluntary count by sum of Terminate count when terminate count not equal to 0:<br><br>Case when [(IF Fact Workforce.TERMINATE_COUNT <> 0 AND Dimension Action.WA_VOLUNTARY_FLAG = 'V' then Fact Workforce.TERMINATE_COUNT else 0) * 100 / nullif (Fact Workforce.TERMINATE_COUNT,0)] else 0. |



| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>   |
|-------------------------------------|---|
| Involuntary Term Rate               | <p>Workforce (F_WORKFORCE) Fact</p> <p>This measure is calculated by dividing sum of Involuntary count by sum of Termination count when terminate count not equal to 0:</p> <p>Case when [(IF Fact Workforce.TERMINATE_COUNT &lt;&gt; 0 AND Dimension Action.WA_VOLUNTARY_FLAG = 'T' then Fact Workforce.TERMINATE_COUNT else 0) * 100 / nullif (Fact Workforce.TERMINATE_COUNT,0)] else 0.</p> |

## Top Performer At Risk Report

Access the Top Performer At Risk report, which details top performers at risk of turnover by department, location and job.

| Top Performer At Risk                          |                         |            |                               |                 |                    |                    |  |
|--|-------------------------|------------|-------------------------------|-----------------|--------------------|--------------------|--|
| Person Name Drill                              | Department Name         | Location   | Jobcode Desc                  | Promotion Count | Performance Rating | Snapshot Year Desc |  |
| <a href="#">Rodas Dato, Andres Roberto</a>     | Administration expenses | SK Office  | Executive Director-Operations | 1               | 1                  | Year 2004          |  |
|  |                         |            |                               | 1               |                    | Year 2005          |  |
| <a href="#">Levasseur, Jean-Pierre</a>         | Administration expenses | BRDBG      | HR Representative             | 1               | 1                  | Year 2004          |  |
|  |                         |            |                               | 1               |                    | Year 2005          |  |
| <a href="#">Rast Natascha Jacqueline Ph.D.</a> | Administration expenses | Richmond R | HR Representative             | 1               | 1                  | Year 2004          |  |
|  |                         |            |                               | 1               |                    | Year 2005          |  |
| <a href="#">Novak, Willis</a>                  | Administration expenses | STRASBOURG | HR Representative             | 1               | 1                  | Year 2004          |  |
|  |                         |            |                               | 2               |                    | Year 2005          |  |
| <a href="#">Sweet Hilda</a>                    | Administration expenses | LA Office  | Developer                     | 1               | 1                  | Year 2004          |  |
|  |                         |            |                               | 1               |                    | Year 2005          |  |

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### Top Performer At Risk Report

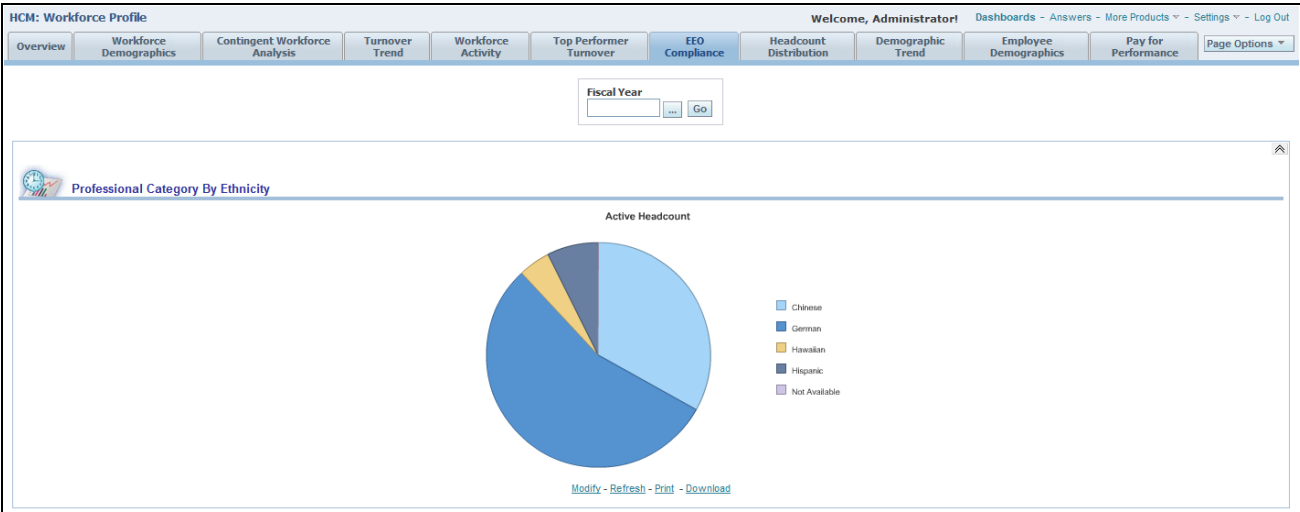
You can click any person name, department name, or location on the graph to review drill down data.

The following table lists the columns and measures used in the Top Performer At Risk report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>       |
|-------------------------------------|---|
| Snapshot Year                       | Day (D_DAY) Dimension                       |
| Department                          | Department (D_DEPT) Dimension               |
| Location                            | Location (D_LOCATION) Dimension             |
| Job Code                            | Employee Job Code (D_EMPL_JOB) Dimension    |
| Performance Rating                  | Employee Appraisal (D_EMPL_APRSL) Dimension |
| Person Name                         | Person (D_PERSON) Dimension                 |
| Promotion Count                     | Workforce (F_WORKFORCE) Fact                |

# Using the Workforce Profile Dashboard - Equal Employment Opportunity (EEO) Compliance Page

Access the EEO Compliance page (HCM: Human Capital Management, HCM: Workforce Profile, EEO Compliance).

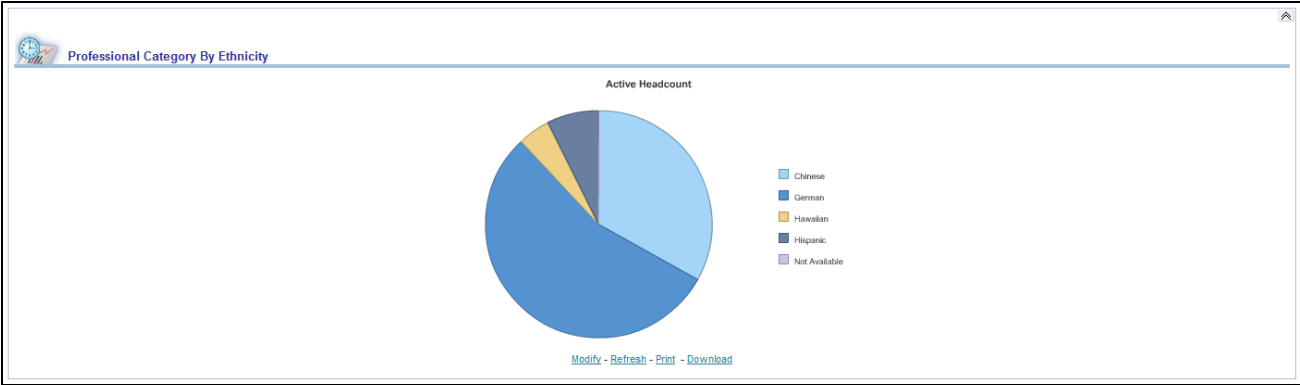


EEO Compliance Page

| Usage  | Reports   | Dashboard Prompt  |
|--|---|---|
| Provides an overview of equal employment opportunity metrics for your organization by ethnicity, gender, and minority group. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Professional Category By Ethnicity report</li><li>Minority Representation by Job Category report</li><li>Female Representation By Job Category report</li></ul> | Use the EEO Compliance page prompt to filter page results by <i>Fiscal Year</i> . |

## Professional Category By Ethnicity Report

Access the Professional Category By Ethnicity report, which enables you to analyze the ethnic composition of your workforce.



Professional Category By Ethnicity Report

The Professional Category By Ethnicity pie chart displays *Headcount* data grouped by *Ethnic Group*.

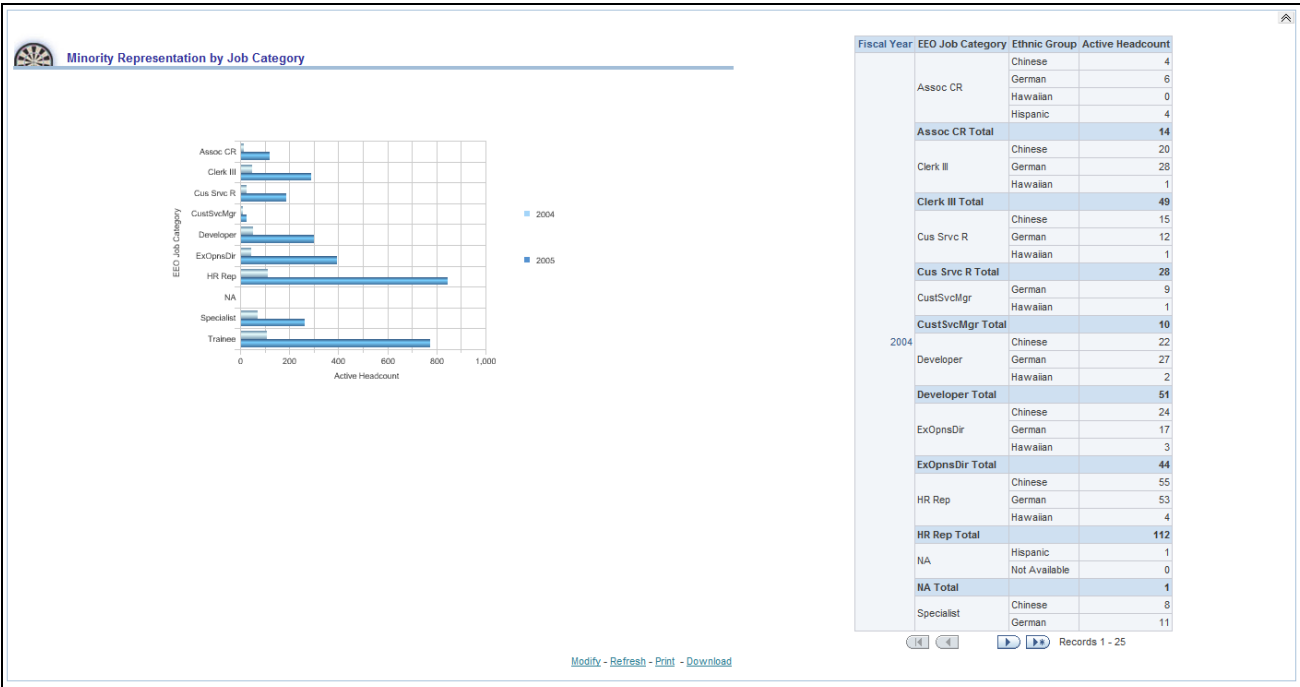
**Note.** You can click on a pie slice to drill down to active headcount data for a particular ethnic group.

The following table lists the columns and measures used in the Professional Category By Ethnicity report.

| Report Column / Measure Name | Report Column / Measure Origin |
|------------------------------|--------------------------------|
| Snapshot Year                | Day (D_DAY) Dimension          |
| Ethnic Group                 | Person (D_PERSON) Dimension    |
| Headcount                    | Workforce (F_WORKFORCE) Fact   |

Minority Representation by Job Category Report

Access the Minority Representation by Job Category report, which enables you to analyze the ethnic composition of employees across equal employment opportunity job categories.



Minority Representation by Job Category Report

The Minority Representation by Job Category graph displays *Headcount* data on the x-axis and *EEO Job Category* and *Fiscal Year* data on the y-axis.

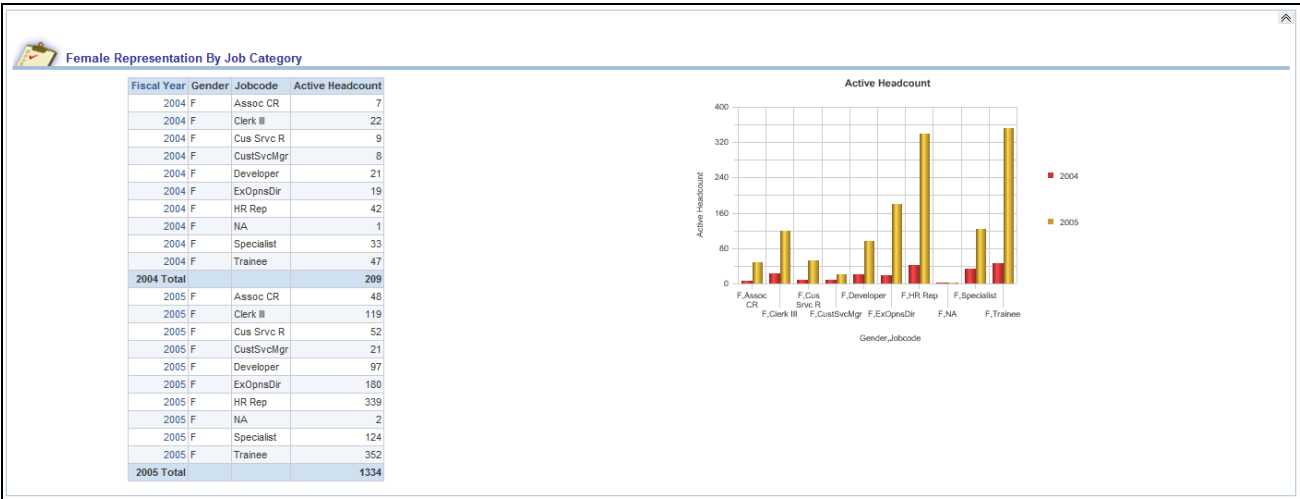
**Note.** You can click on graph data to review drill down data for a particular year.

The following table lists the columns and measures used in the Minority Representation by Job Category report.

| Report Column / Measure Name | Report Column / Measure Origin |
|------------------------------|--------------------------------|
| Fiscal Year                  | Day (D_DAY) Dimension          |
| EEO Job Category             | Job Code (D_JOBCODE) Dimension |
| Ethnic Group                 | Person (D_PERSON) Dimension    |
| Headcount                    | Workforce (F_WORKFORCE) Fact   |

Female Representation By Job Category Report

Access the Female Representation By Job Category report, which enables you to analyze female representation across job categories.



Female Representation By Job Category Report

The Female Representation By Job Category graph displays *Gender* and *Job Code* data on the x-axis and *Headcount* and *Fiscal Year* data on the y-axis.

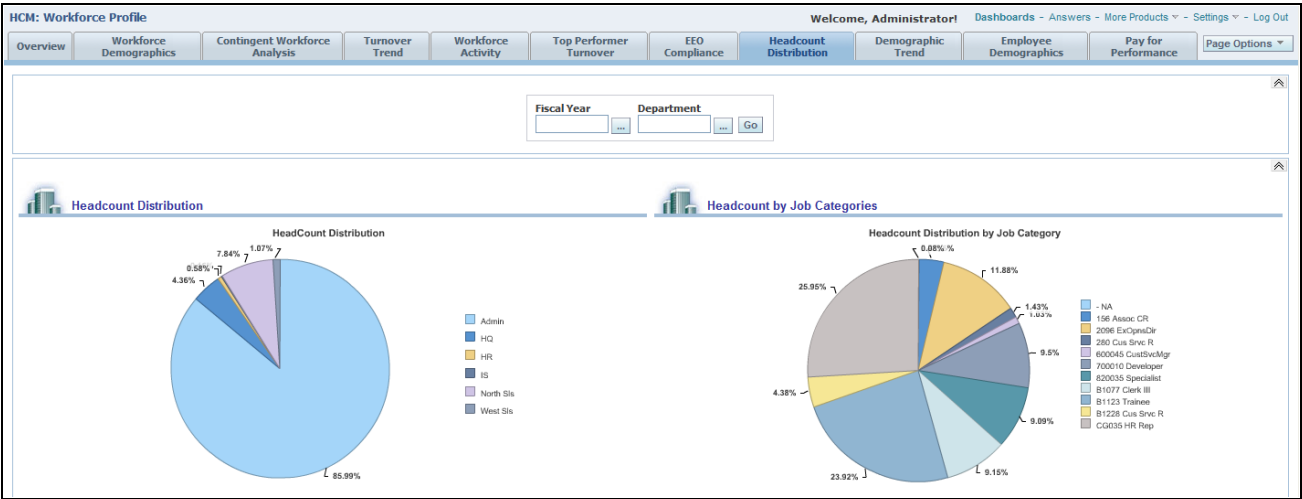
**Note.** You can click on graph data to review drill down data for a particular job code and year.

The following table lists the columns and measures used in the Female Representation By Job Category report.

| Report Column / Measure Name | Report Column / Measure Origin           |
|------------------------------|--|
| Fiscal Year                  | Day (D_DAY) Dimension                    |
| Gender                       | Person (D_PERSON) Dimension              |
| Job Code                     | Employee Job Code (D_EMPL_JOB) Dimension |
| Headcount                    | Workforce (F_WORKFORCE) Fact             |

Using the Workforce Profile Dashboard - Headcount Distribution Page

Access the Headcount Distribution page (HCM: Human Capital Management, HCM: Workforce Profile, Headcount Distribution).

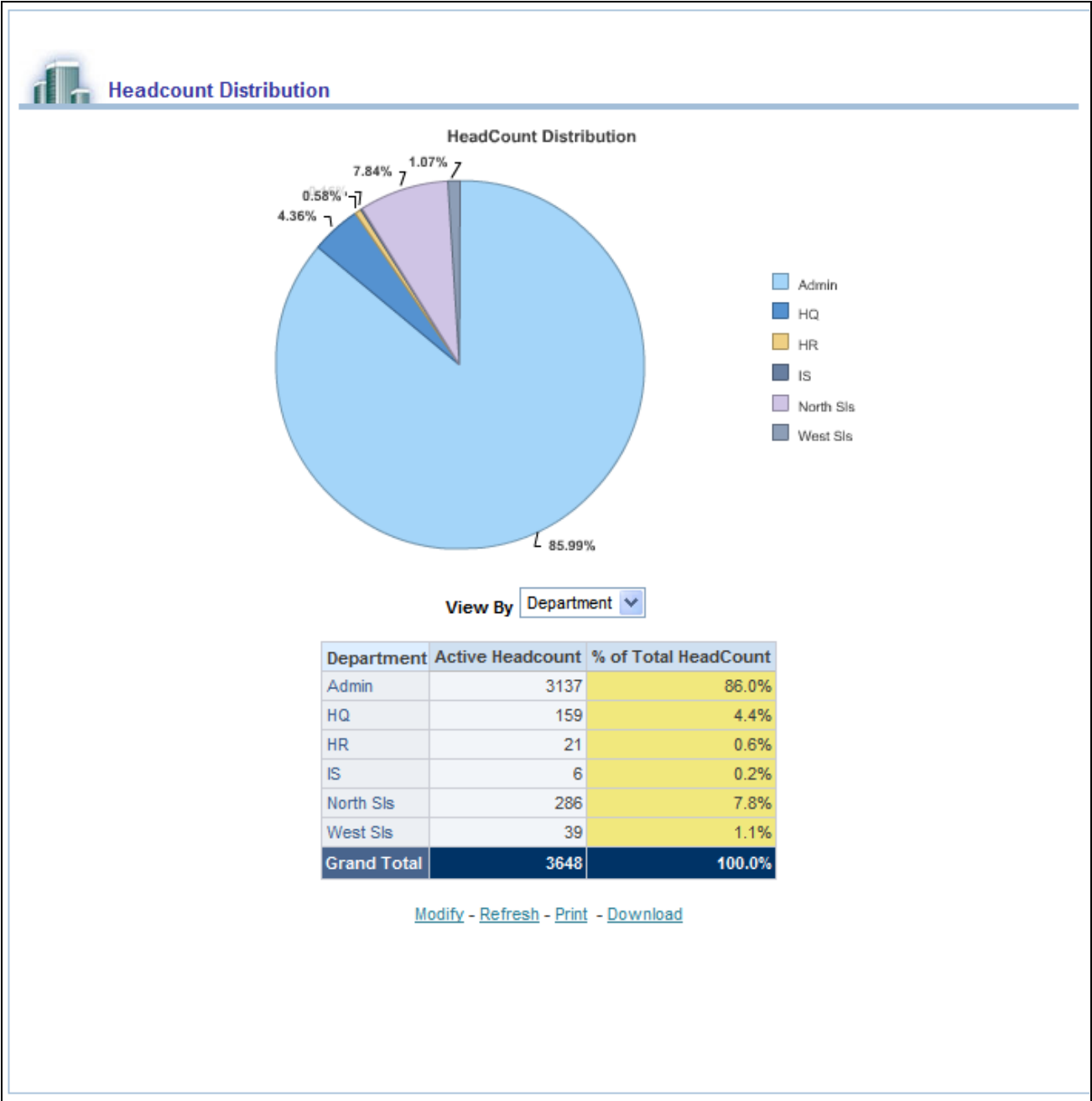


Headcount Distribution Page

| Usage   | Reports  | Dashboard Prompt  |
|---|--|---|
| Provides an overview of headcount distribution for your organization by department and job category, as well as headcount trends. | <p>This page is comprised of the following reports:</p> <ul style="list-style-type: none"><li>Headcount Distribution report</li><li>Headcount by Job Categories report</li><li>Organization Headcount Trend report</li></ul> | <p>Use the Headcount Distribution page prompt to filter page results by:</p> <ul style="list-style-type: none"><li>Fiscal Year</li><li>Department</li></ul> |

Headcount Distribution Report

Access the Headcount Distribution report, which enables you to analyze the distribution of employees across departments or location.



Headcount Distribution Report

| Pie Chart Data   | View By Filter  |
|--|---|
| <p>The Headcount Distribution pie chart displays <i>Headcount</i> data grouped by <i>Department</i>.</p> <p><b>Note.</b> You can click on a pie slice to drill down to headcount data for a particular department or location.</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"><li><i>Department</i> (default)</li><li><i>Location</i></li></ul> |

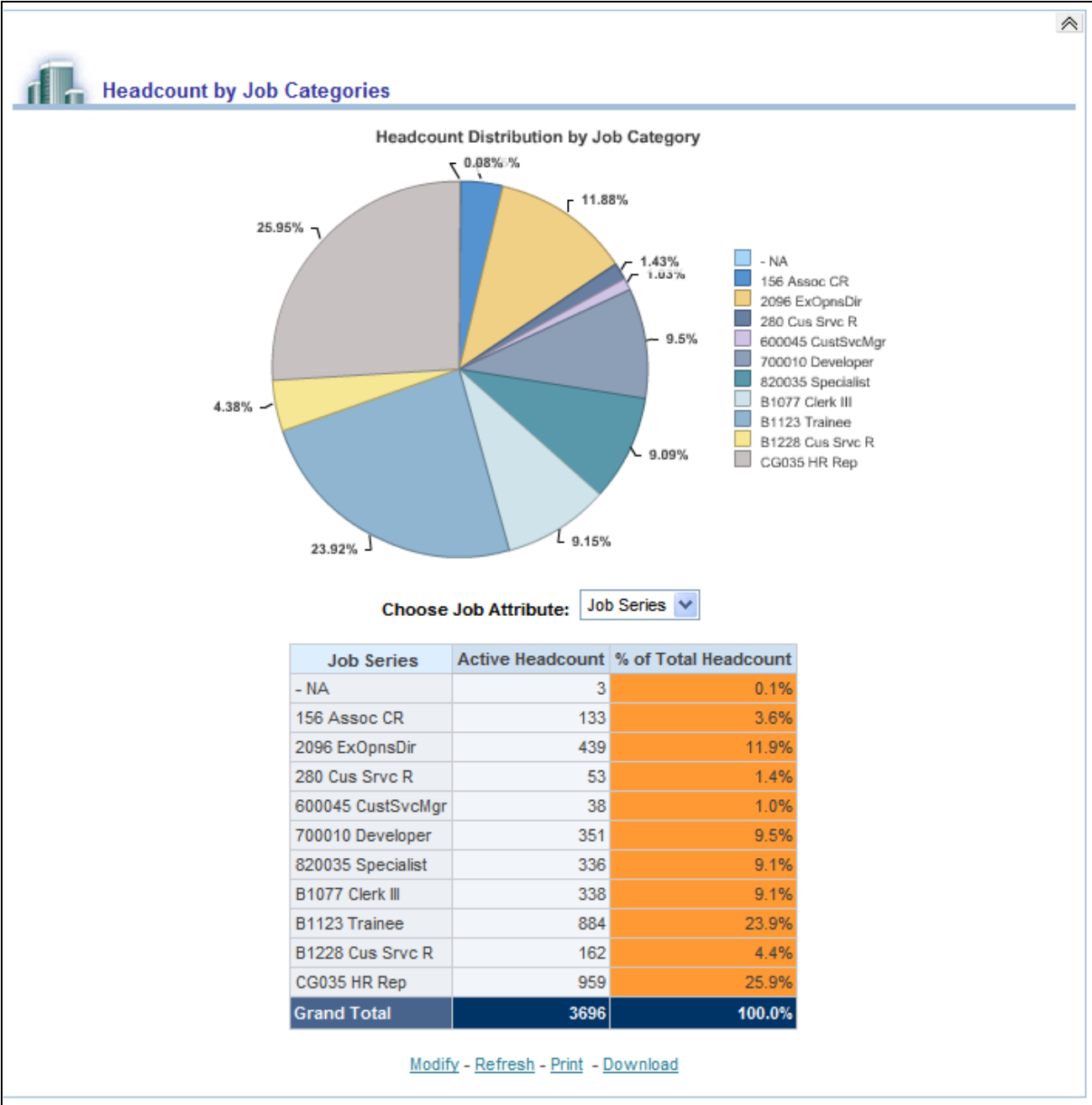
The following table lists the columns and measures used in the Headcount Distribution report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>      |
|-------------------------------------|--|
| Department                          | Department (D_DEPT) Dimension              |
| Location                            | Location (D_LOCATION) Dimension            |
| Headcount                           | Workforce (F_WORKFORCE) Fact               |
| % of Total Headcount                | (Applicant Count / Total Applicants) * 100 |

## Headcount by Job Categories Report

Access the Headcount by Job Categories report, which enables you to analyze the distribution of employees across job categories.





Headcount by Job Categories Report

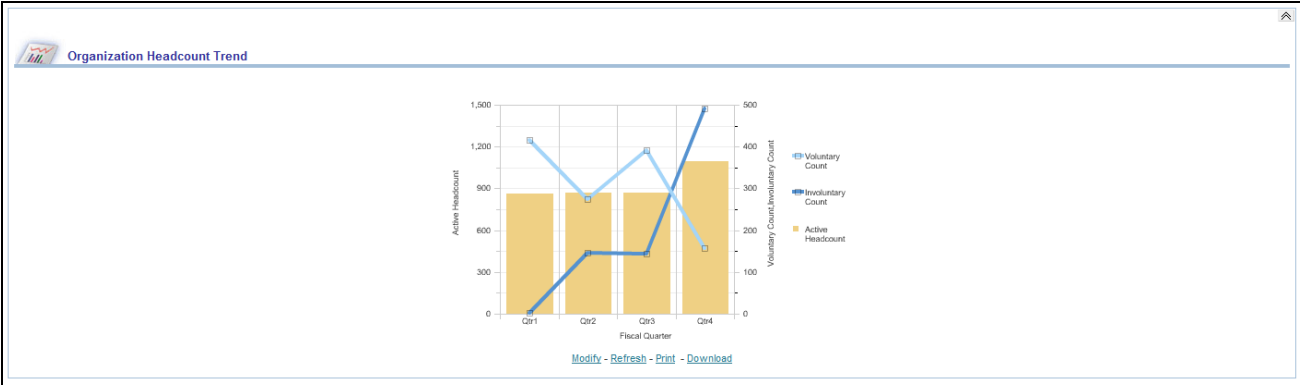
| <b><i>Pie Chart Data</i></b>  | <b><i>View By Filter</i></b>   |
|---|--|
| <p>The Headcount by Job Categories pie chart displays <i>Headcount</i> data grouped by <i>Job Series</i>.</p> <p>Headcount data can also be grouped by the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Grade</i></li> <li>• <i>Job Code</i></li> <li>• <i>Job Series</i> (default)</li> </ul> <p><b>Note.</b> You can click on a pie slice to drill down to headcount data for a particular job code, job series, or grade.</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Grade</i></li> <li>• <i>Job Code</i></li> <li>• <i>Job Series</i> (default)</li> </ul> |

The following table lists the columns and measures used in the Headcount by Job Categories report.

| <b><i>Report Column / Measure Name</i></b> | <b><i>Report Column / Measure Origin</i></b> |
|--|--|
| Job Code                                   | Employee Job Code (D_EMPL_JOB) Dimension     |
| Job Series                                 | Employee Job Code (D_EMPL_JOB) Dimension     |
| Grade                                      | Employee Job Code (D_EMPL_JOB) Dimension     |
| Headcount                                  | Workforce (F_WORKFORCE) Fact                 |
| % of Total Headcount                       | (Applicant Count / Total Applicants) * 100   |

## Organization Headcount Trend Report

Access the Organization Headcount Trend report, which details headcount, voluntary count, and involuntary count trends.



Organization Headcount Trend Report

The Organization Headcount Trend graph displays *Fiscal Quarter* data on the x-axis and *Headcount* data on the y-axis, with *Voluntary Count* and *Involuntary Count* data plotted across the x/y-axis.

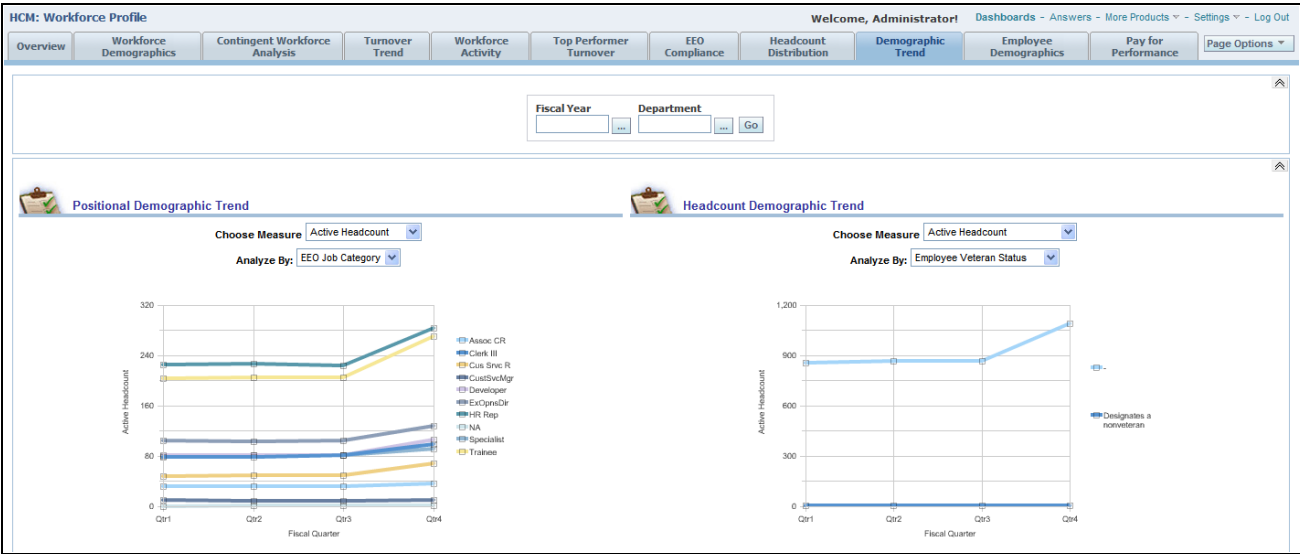
**Note.** You can on graph data to review drill down data for a particular quarter.

The following table lists the columns and measures used in the Organization Headcount Trend report.

| Report Column / Measure Name | Report Column / Measure Origin |
|------------------------------|--------------------------------|
| Fiscal Quarter               | Day (D_DAY) Dimension          |
| Voluntary Count              | Workforce (F_WORKFORCE) Fact   |
| Involuntary Count            | Workforce (F_WORKFORCE) Fact   |
| Headcount                    | Workforce (F_WORKFORCE) Fact   |

Using the Workforce Profile Dashboard - Demographic Trend Page

Access the Demographic Trend page (HCM: Human Capital Management, HCM: Workforce Profile, Demographic Trend).



Demographic Trend Page

| Usage  | Reports  | Dashboard Prompt   |
|--|--|--|
| Provides an overview of demographic trends for your organization, by position and headcount. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Positional Demographic Trend report</li><li>Headcount Demographic Trend report</li></ul> | <div>Use the Demographic Trend page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Fiscal Year</li><li>Department</li></ul> |

Positional Demographic Trend Report

Access the Positional Demographic Trend report, which enables you to analyze active headcount, voluntary headcount, involuntary headcount, and promotions by various dimensions, such as pay grade and job category.



Positional Demographic Trend Report

| <b>X,Y Axis Data</b>   | <b>Choose Measure</b>   | <b>Analyze By Filter</b>  |
|--|---|---|
| <p>The Positional Demographic Trend graph displays <i>Fiscal Quarter</i> data on the x-axis and <i>Headcount</i> data on the y-axis, with <i>EEO Job Category</i> data plotted across the x/y-axis.</p> <p>The y-axis can also display any of the following measures, depending on your Choose Measure filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Headcount</i> (default)</li> <li>• <i>Voluntary Headcount</i></li> <li>• <i>Involuntary Headcount</i></li> <li>• <i>Number of Promotion</i></li> </ul> <p>The x/y-axis can also plot any of the following dimensions, depending on your Analyze By filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Pay Grade</i></li> <li>• <i>Job Category</i></li> <li>• <i>EEO Job Category</i> (default)</li> </ul> <p><b>Note.</b> You can click on graph data to review drill down data for a particular quarter.</p> | <p>Use this filter to view report results by the following measures:</p> <ul style="list-style-type: none"> <li>• <i>Headcount</i> (default)</li> <li>• <i>Voluntary Headcount</i></li> <li>• <i>Involuntary Headcount</i></li> <li>• <i>Number of Promotion</i></li> </ul> | <p>Use this filter to view report results by the following dimensions:</p> <ul style="list-style-type: none"> <li>• <i>Pay Grade</i></li> <li>• <i>Job Series</i></li> <li>• <i>EEO Job Category</i> (default)</li> </ul> |

The following table lists the columns and measures used in the Positional Demographic Trend report.

| <b>Report Column / Measure Name</b>    | <b>Report Column / Measure Origin</b>    |
|--|--|
| Fiscal Quarter                         | Day (D_DAY) Dimension                    |
| Job Series                             | Employee Job Code (D_EMPL_JOB) Dimension |
| EEO Job Category                       | Job Code (D_JOBCODE) Dimension           |
| Pay Grade                              | Employee Job Code (D_EMPL_JOB) Dimension |
| Number of Promotions (Promotion Count) | Workforce (F_WORKFORCE) Fact             |
| Voluntary Count                        | Workforce (F_WORKFORCE) Fact             |
| Involuntary Count                      | Workforce (F_WORKFORCE) Fact             |
| Headcount                              | Workforce (F_WORKFORCE) Fact             |

Headcount Demographic Trend Report

Access the Headcount Demographic Trend report, which enables you to analyze active headcount, voluntary headcount, involuntary headcount, and promotions by various dimensions, such as pay grade and job category.



Headcount Demographic Trend Report

| <b>X,Y Axis Data</b>   | <b>Choose Measure</b>  | <b>Analyze By Filter</b>  |
|--|--|---|
| <p>The Headcount Demographic Trend graph displays <i>Fiscal Quarter</i> data on the x-axis and <i>Headcount</i> data on the y-axis, with <i>Employee Veteran Status</i> data plotted across the x/y-axis.</p> <p>The y-axis can also display any of the following measures, depending on your Choose Measure filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Headcount</i> (default)</li> <li>• <i>Voluntary Headcount</i></li> <li>• <i>Involuntary Headcount</i></li> <li>• <i>Number of Promotion</i></li> <li>• <i>Dissatisfied Termination Ratio</i></li> </ul> <p>The x/y-axis can also plot any of the following dimensions, depending on your Analyze By filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Age</i></li> <li>• <i>Employee High Potential Flag</i></li> <li>• <i>Employee Marital Status</i></li> <li>• <i>Gender</i></li> <li>• <i>Employee Citizenship</i></li> <li>• <i>Employee Disability</i></li> <li>• <i>Security Clearance Level</i></li> <li>• <i>Ethnic Group</i></li> <li>• <i>Veterans Preference Code</i></li> <li>• <i>Employee Veteran Status</i> (default)</li> </ul> <p><b>Note.</b> You can click on the data in the graph to review drill down data for a particular quarter.</p> | <p>Use this filter to view report results by the following measures:</p> <ul style="list-style-type: none"> <li>• <i>Headcount</i> (default)</li> <li>• <i>Voluntary Headcount</i></li> <li>• <i>Involuntary Headcount</i></li> <li>• <i>Number of Promotion</i></li> <li>• <i>Dissatisfied Termination Ratio</i></li> </ul> | <p>Use this filter to view report results by the following dimensions:</p> <ul style="list-style-type: none"> <li>• <i>Age</i></li> <li>• <i>Employee High Potential Flag</i></li> <li>• <i>Employee Marital Status</i></li> <li>• <i>Gender</i></li> <li>• <i>Employee Citizenship</i></li> <li>• <i>Employee Disability</i></li> <li>• <i>Security Clearance Level</i></li> <li>• <i>Ethnic Group</i></li> <li>• <i>Veterans Preference Code</i></li> <li>• <i>Employee Veteran Status</i> (default)</li> </ul> |

The following table lists the columns and measures used in the Headcount Demographic Trend report.

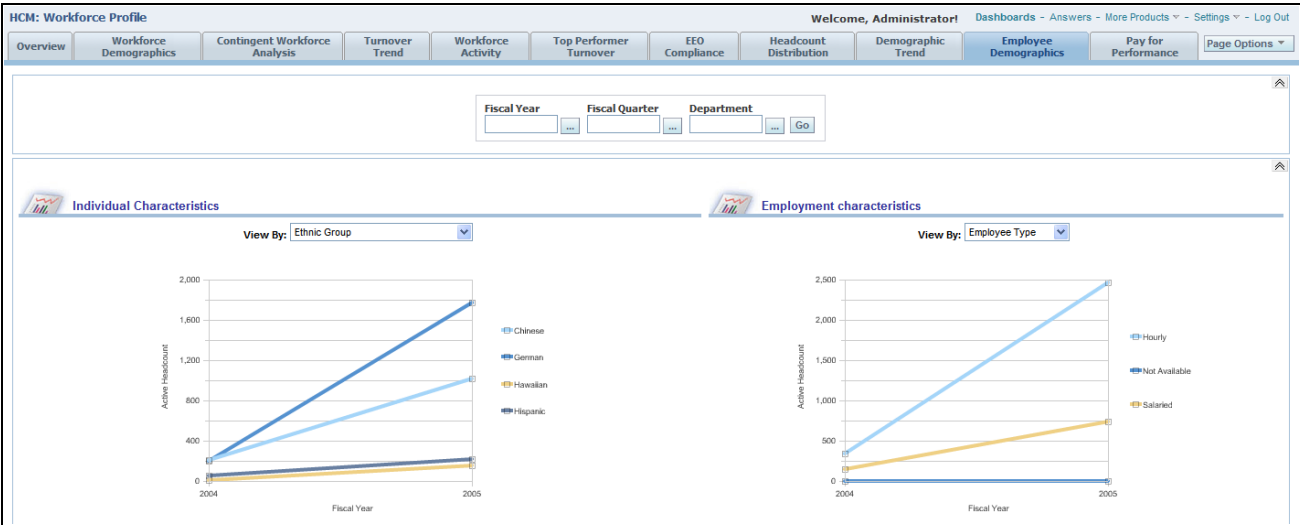
| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b> |
|-------------------------------------|---------------------------------------|
| Fiscal Quarter                      | Day (D_DAY) Dimension                 |
| Age                                 | Person (D_PERSON) Dimension           |



| <b>Report Column / Measure Name</b>    | <b>Report Column / Measure Origin</b>   |
|--|---|
| Employee High Potential Flag           | <p>This flag uses a <i>Y</i> or <i>N</i> value, based on Higher Education Level (HI_EDU_LVL_CD) values, which include:</p> <ul style="list-style-type: none"> <li>• <i>J</i> (Doctorate Academic)</li> <li>• <i>K</i> (Doctorate Professional)</li> <li>• <i>L</i> (Post Doctorate)</li> </ul> <p>If HI_EDU_LVL_CD value = J, K or L, then Employee High Potential Flag is set to Y. Otherwise, the flag is set to N.</p> |
| Employee Marital Status                | Person (D_PERSON) Dimension   |
| Gender                                 | Person (D_PERSON) Dimension   |
| Employee Citizenship                   | Person (D_PERSON) Dimension   |
| Employee Disability                    | Person (D_PERSON) Dimension   |
| Security Clearance Level               | Position (D_POS) Dimension  |
| Ethnic Group                           | Person (D_PERSON) Dimension   |
| Veterans Preference Code               | Person (D_PERSON) Dimension   |
| Employee Veteran Status                | Person (D_PERSON) Dimension   |
| Voluntary Count                        | Workforce (F_WORKFORCE) Fact  |
| Involuntary Count                      | Workforce (F_WORKFORCE) Fact  |
| Headcount                              | Workforce (F_WORKFORCE) Fact  |
| Number of Promotions (Promotion Count) | Workforce (F_WORKFORCE) Fact  |
| Dissatisfied Termination Ratio         | <p>Workforce (F_WORKFORCE) Fact:</p> <p>(If F_WORKFORCE.TERMINATE_COUNT &lt;&gt; 0 AND D_WA_ACTION.ACTION = 'TER' AND D_WA_ACTION.WA_VOLUNTARY_FLAG = 'V' AND D_WA_ACTION.ACTION_REASON in ([ 'EES', 'HRS', 'LOC', 'LOF', 'PAY', 'POL', 'PRM', 'SUP', 'TYP', 'UNS', 'USP', 'WOR' ] ) then F_WORKFORCE.TERMINATE_COUNT else 0) / nullif(F_WORKFORCE.TERMINATE_COUNT) , 0)</p>  |

# Using the Workforce Profile Dashboard - Employee Demographics Page

Access the Employee Demographics page (HCM: Human Capital Management, HCM: Workforce Profile, Employee Demographics).

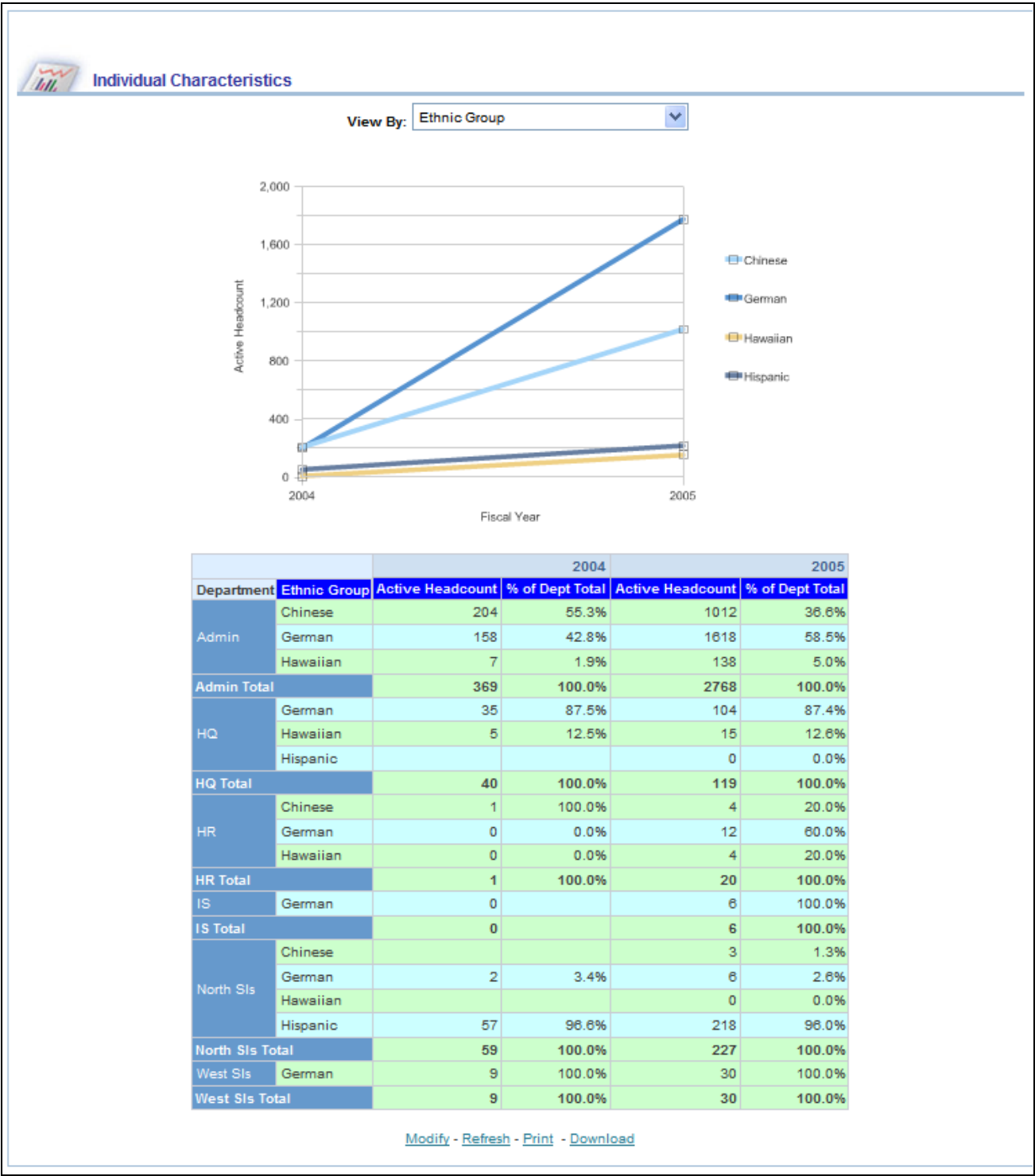


Employee Demographics Page

| Usage  | Reports   | Dashboard Prompt  |
|--|---|---|
| Provides a detailed overview of employee demographics and characteristics for your organization. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Individual Characteristics report</li><li>Employment Characteristics report</li></ul> | <div>Use the Employee Demographics page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Fiscal Year</li><li>Fiscal Quarter</li><li>Department</li></ul> |

## Individual Characteristics Report

Access the Individual Characteristics report, which details trending of employee characteristics by ethnic group, age, gender, and so forth.



Individual Characteristics Report

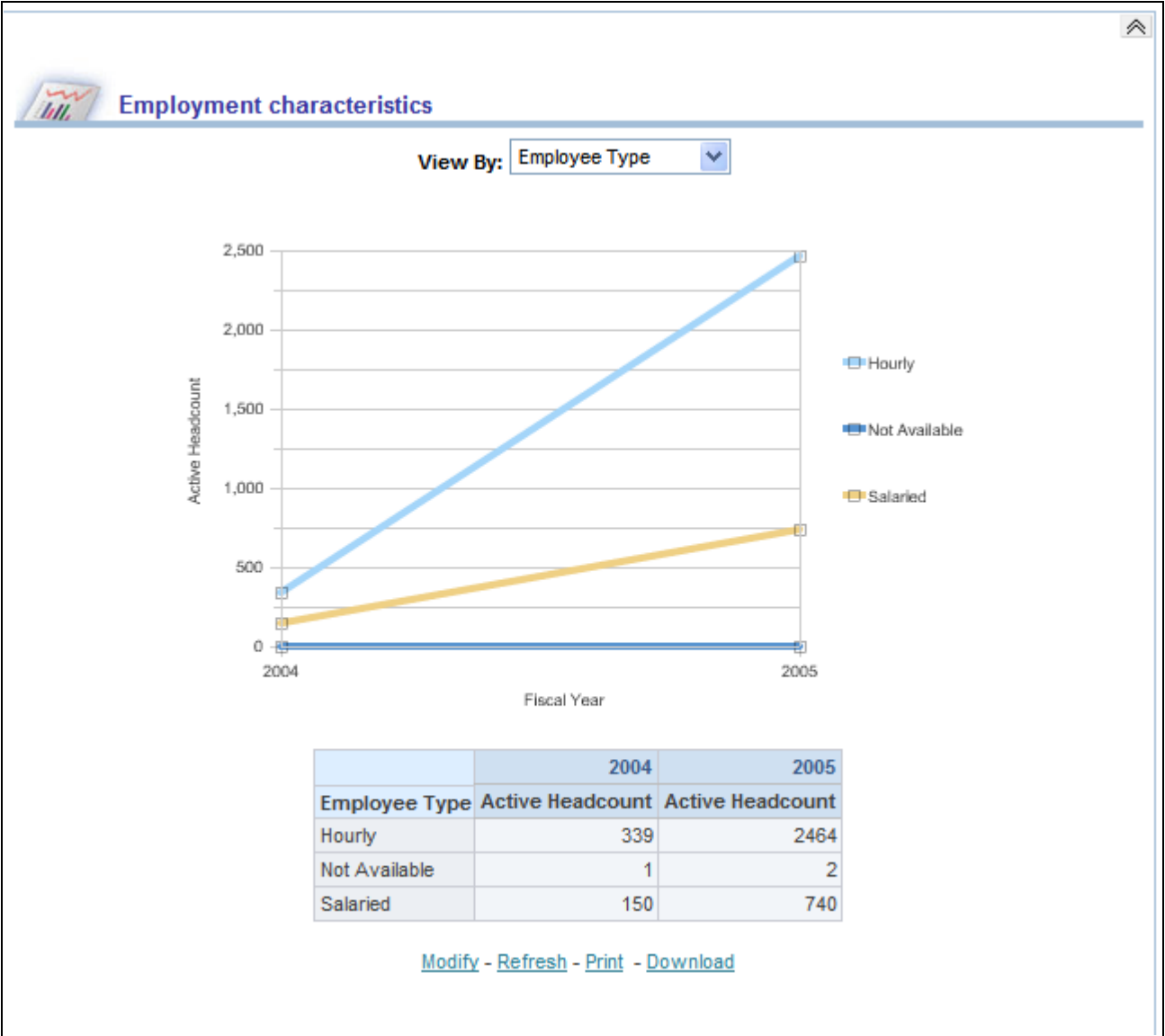
| <b>X,Y Axis Data</b>  | <b>View By Filter</b>  |
|---|--|
| <p>The Individual Characteristics graph displays <i>Fiscal Year</i> data on the x-axis and <i>Headcount</i> data on the y-axis, with <i>Ethnic Group</i> data plotted across the x/y-axis.</p> <p>The x/y-axis can also plot any of the following dimensions, depending on your View By filter selection:</p> <ul style="list-style-type: none"> <li>• <i>Gender</i></li> <li>• <i>Age</i></li> <li>• <i>Employee Citizenship</i></li> <li>• <i>Employee Disability</i></li> <li>• <i>Security Clearance Level</i></li> <li>• <i>Employee Highest Education Degree</i></li> <li>• <i>Employee Marital Status</i></li> <li>• <i>Ethnic Group</i> (default)</li> </ul> <p><b>Note.</b> You can click on graph data to review drill down data for a particular year.</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Gender</i></li> <li>• <i>Age</i></li> <li>• <i>Employee Citizenship</i></li> <li>• <i>Employee Disability</i></li> <li>• <i>Security Clearance Level</i></li> <li>• <i>Employee Highest Education Degree</i></li> <li>• <i>Employee Marital Status</i></li> <li>• <i>Ethnic Group</i> (default)</li> </ul> |

The following table lists the columns and measures used in the Individual Characteristics report.

| <b>Report Column / Measure Name</b> | <b>Report Column / Measure Origin</b>  |
|-------------------------------------|--|
| Fiscal Year                         | Day (D_DAY) Dimension  |
| Gender                              | Person (D_PERSON) Dimension  |
| Age                                 | Person (D_PERSON) Dimension  |
| Employee Citizenship                | Person (D_PERSON) Dimension  |
| Employee Disability                 | Person (D_PERSON) Dimension  |
| Security Clearance Level            | Position (D_POS) Dimension   |
| Employee Highest Education Degree   | Person (D_PERSON) Dimension  |
| Employee Marital Status             | Person (D_PERSON) Dimension  |
| Ethnic Group                        | Person (D_PERSON) Dimension  |
| Headcount                           | Workforce (F_WORKFORCE) Fact   |
| % of Department Total               | Workforce (F_WORKFORCE) Fact:<br>(Active Headcount / Total Active Headcount) * 100 |

## Employment Characteristics Report

Access the Employment Characteristics report, which details active headcount by employee type and full time or part time.



Employment Characteristics Report

| <b><i>X,Y Axis Data</i></b>   | <b><i>View By Filter</i></b>   |
|---|--|
| <p>The Employment Characteristics graph displays <i>Fiscal Year</i> data on the x-axis and <i>Headcount</i> data on the y-axis, with <i>Employee Type</i> data plotted across the x/y-axis.</p> <p>The x/y-axis can also plot the Full Time/Part Time dimension, depending on your View By filter selection.</p> <p><b>Note.</b> You can click on graph data to review drill down data for a particular year.</p> | <p>Use this filter to view report results by:</p> <ul style="list-style-type: none"> <li>• <i>Employee Type</i> (default)</li> <li>• <i>Full Time Part Time</i></li> </ul> |

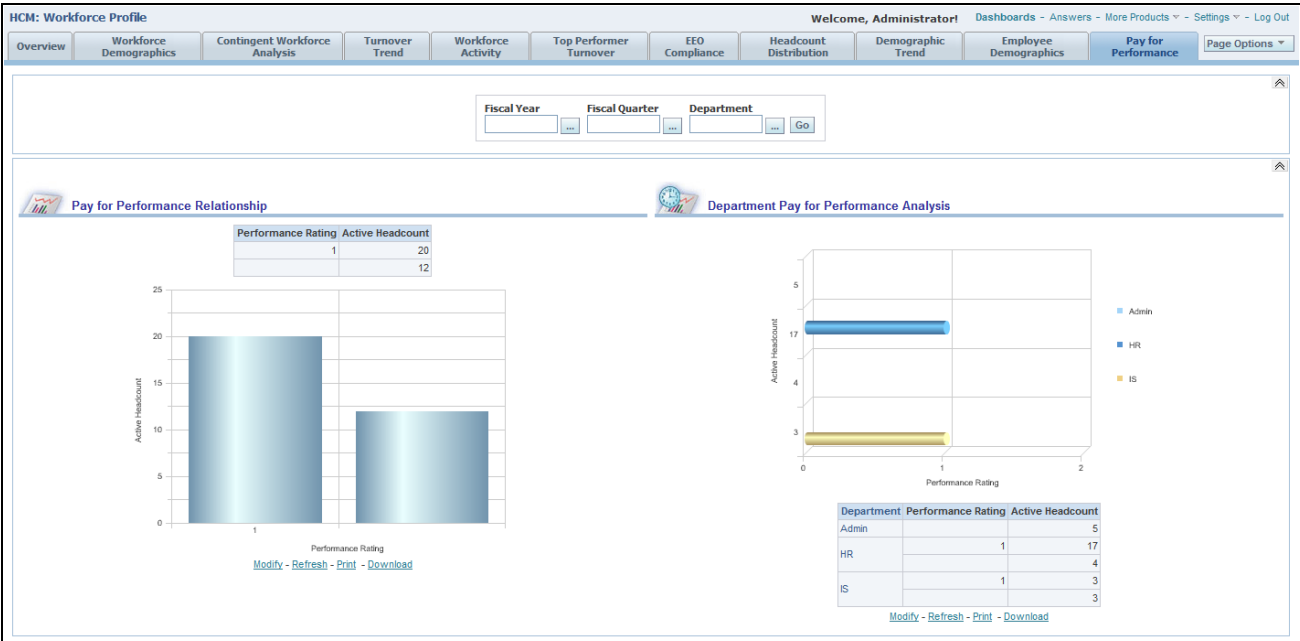
The following table lists the columns and measures used in the Employment Characteristics report.

| <b><i>Report Column / Measure Name</i></b> | <b><i>Report Column / Measure Origin</i></b> |
|--|--|
| Fiscal Year                                | Day (D_DAY) Dimension                        |
| Employee Type                              | Employee Job Code (D_EMPL_JOB) Dimension     |
| Full Time / Part Time                      | Employee Job Code (D_EMPL_JOB) Dimension     |
| Headcount                                  | Workforce (F_WORKFORCE) Fact                 |

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## Using the Workforce Profile Dashboard - Pay for Performance Page

Access the Pay for Performance page (HCM: Human Capital Management, HCM: Workforce Profile, Pay for Performance).

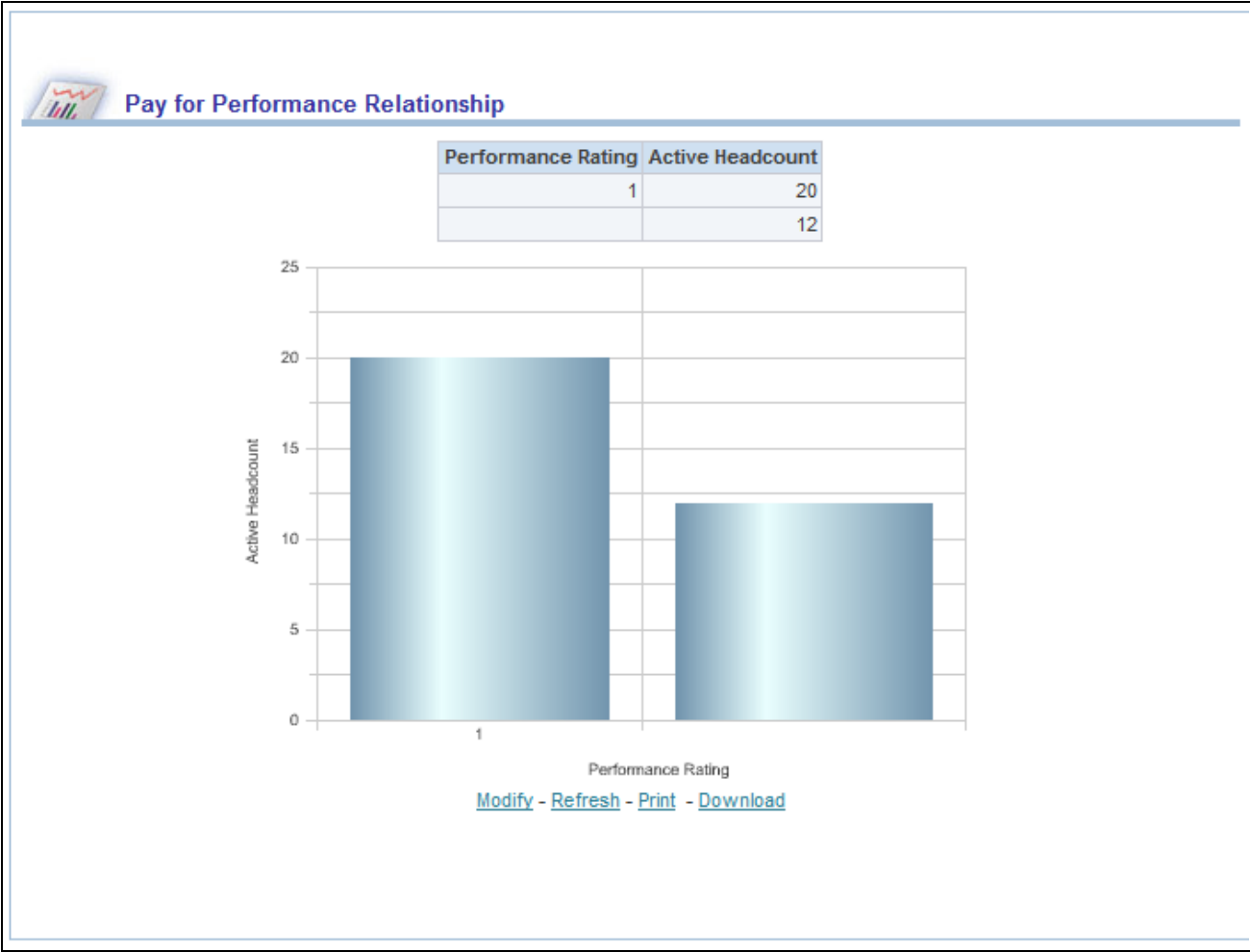


Pay for Performance Page

| Usage  | Reports  | Dashboard Prompt  |
|--|--|---|
| Provides an overview of performance pay metrics for your organization, by relationship and department. | <div>This page is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Pay for Performance Relationship report</li><li>Department Pay for Performance Analysis report</li></ul> | <div>Use the Pay for Performance page prompt to filter page results by:</div> <ul style="list-style-type: none"><li>Fiscal Year</li><li>Fiscal Quarter</li><li>Department</li></ul> |

Pay for Performance Relationship Report

Access the Pay for Performance Relationship report, which details performance rating and active headcount metrics.



Pay for Performance Relationship Report

The Pay for Performance Relationship graph displays *Performance Rating* data on the x-axis and *Headcount* data on the y-axis.

The following table lists the columns and measures used in the Pay for Performance Relationship report.

| Report Column / Measure Name | Report Column / Measure Origin              |
|------------------------------|---|
| Performance Rating           | Employee Appraisal (D_EMPL_APRSL) Dimension |
| Headcount                    | Workforce (F_WORKFORCE) Fact                |

## Department Pay for Performance Analysis Report

Access the Department Pay for Performance Analysis report, which details performance rating and active headcount metrics by department.





Department Pay for Performance Analysis Report

The Department Pay for Performance Analysis graph displays *Performance Rating* data on the x-axis and *Headcount* data on the y-axis, with *Department* data plotted across the x/y-axis.

**Note.** You can click on graph data to review drill down data for a particular department.

The following table lists the columns and measures used in the Department Pay for Performance Analysis report.

| Report Column / Measure Name | Report Column / Measure Origin              |
|------------------------------|---|
| Department                   | Department (D_DEPT) Dimension               |
| Performance Rating           | Employee Appraisal (D_EMPL_APRSL) Dimension |
| Headcount                    | Workforce (F_WORKFORCE) Fact                |



## Chapter 8

# Working with Delivered OBIEE Dashboards for the Supply Chain Management (SCM) Warehouse

This chapter provides prerequisites, an overview of delivered OBIEE dashboards for the SCM Warehouse, and discusses:

- Procurement Dashboard
- Spend Dashboard

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## Prerequisites

Before you use dashboards for the SCM Warehouse, you must implement:

- PeopleSoft SCM Warehouse.
- PeopleSoft Enterprise online transaction applications that supply data to the SCM Warehouse data marts.

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## Understanding Dashboards for the SCM Warehouse

The prebuilt dashboard and reports packaged for the SCM Warehouse help track procurement operations performance and analyze spending by commodity and supplier to discover ways to decrease costs, cycle times, and working capital.

PeopleSoft provides dashboards that map to the following SCM Warehouse data marts:

- Fulfillment and Billing
- Procurement
- Spend
- Inventory
- Manufacturing
- Supply Chain Planning

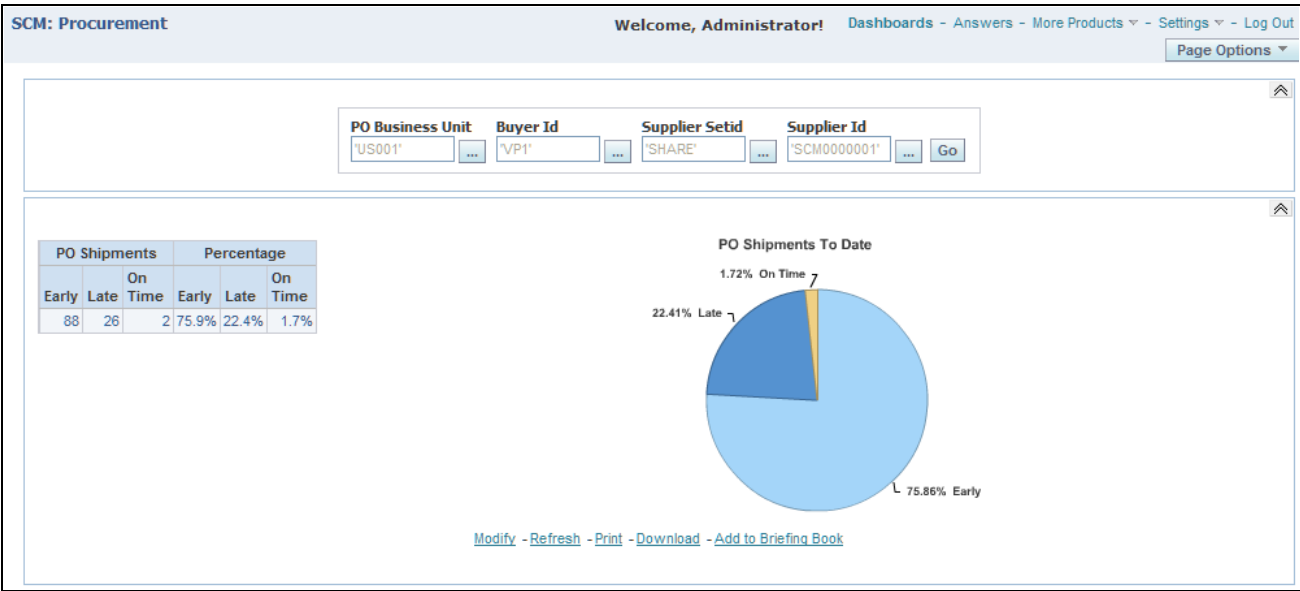
## Delivered Security Groups

This list contains the financials-oriented Oracle BI Server and Oracle Presentation Catalog security groups provided for the SCM Warehouse:

- Business Analyst
- Commodity Manager

## Using the Procurement Dashboard

Access the Procurement Dashboard (SCM Reports, SCM: Procurement, Procurement).

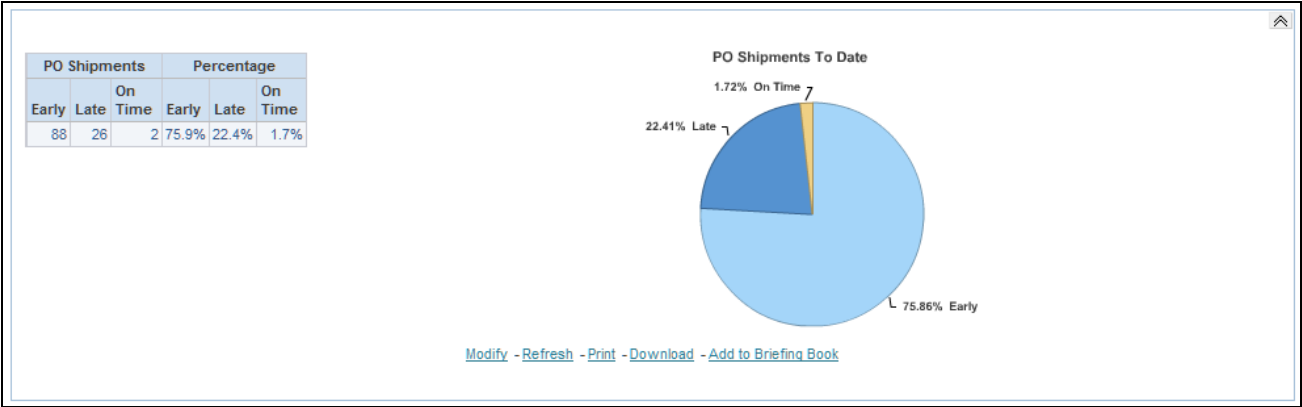


Procurement Dashboard

| Usage   | Dashboard Prompt   |
|---|--|
| Provides you with an overview of supplier on-time performance by vendor PO shipments received versus expected delivery dates. | <div>Use the Procurement dashboard prompt to filter dashboard results by:</div> <ul style="list-style-type: none"><li>• PO Business Unit</li><li>• Buyer ID</li><li>• Supplier SetID</li><li>• Supplier ID</li></ul> |

## Supplier On-Time Performance Report

Access the Supplier On-Time Performance report, which provides insight into the percentage and actual number of vendor shipments that are on time, early, and late for all of the items within a period.



Supplier On-Time Performance Report

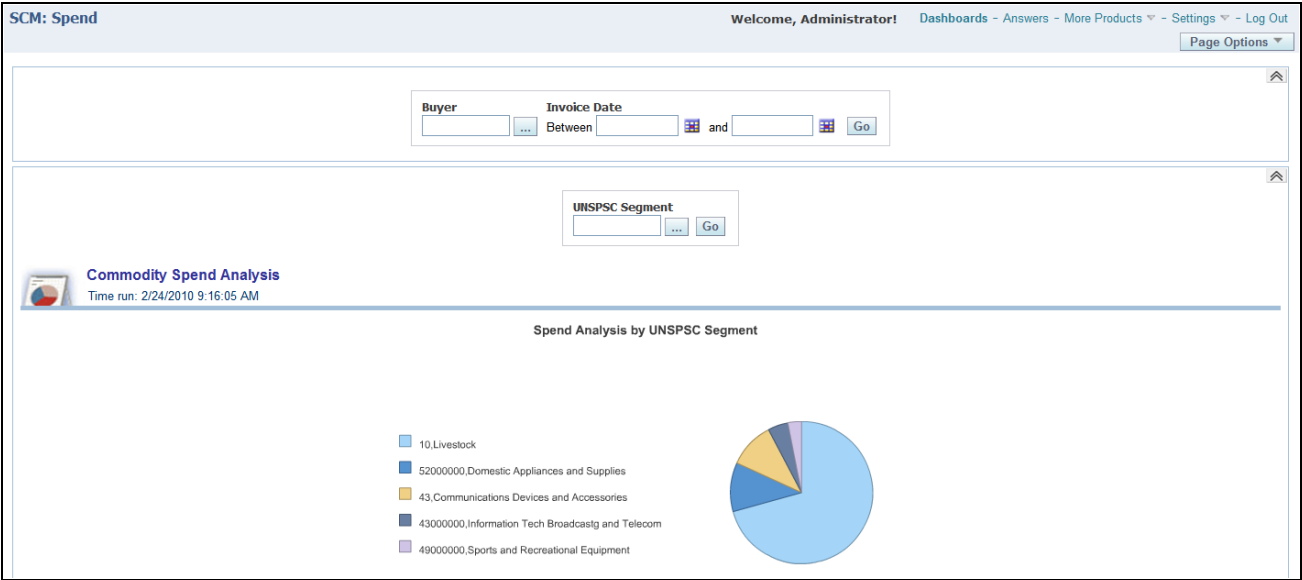
The pie chart shows the percentages of shipments to date that are early, late, and on time. Click a pie segment or a value within the table to view the Supplier On-Time Performance Drill report, which provides details of your shipments, including the items, ship to location, receipt date, and due date.

The following table lists the columns used in the Supplier On-time Performance report.

| Report Column Name | Report Column Origin<br>Record / Field             |
|--------------------|--|
| Delivery Status    | D_DLVRY_STATUS / DLVRY_STATUS_SD                   |
| PO Identifier      | F_PO_SHIP_RCPT / PO_ID                             |
| Item ID            | D_INV_ITEM / INV_ITEM_ID                           |
| Item Description   | D_INV_ITEM / ITEM_LD                               |
| Ship to Location   | F_PO_SHIP_RCPT / SHIP_TO_LOC                       |
| PO Receipt Date    | F_PO_SHIP_RCPT / PO_RCPT_DT                        |
| PO Due Date        | F_PO_SHIP_RCPT / PO_DUE_DT                         |
| Receipt Line       | F_PO_SHIP_RCPT / RCPT_LINE                         |
| Receipts           | F_PO_SHIP_RCP<br>(Value is derived from row count) |

# Using the Spend Dashboard

Access the Spend Dashboard (SCM Reports, SCM: Spend, Spend).

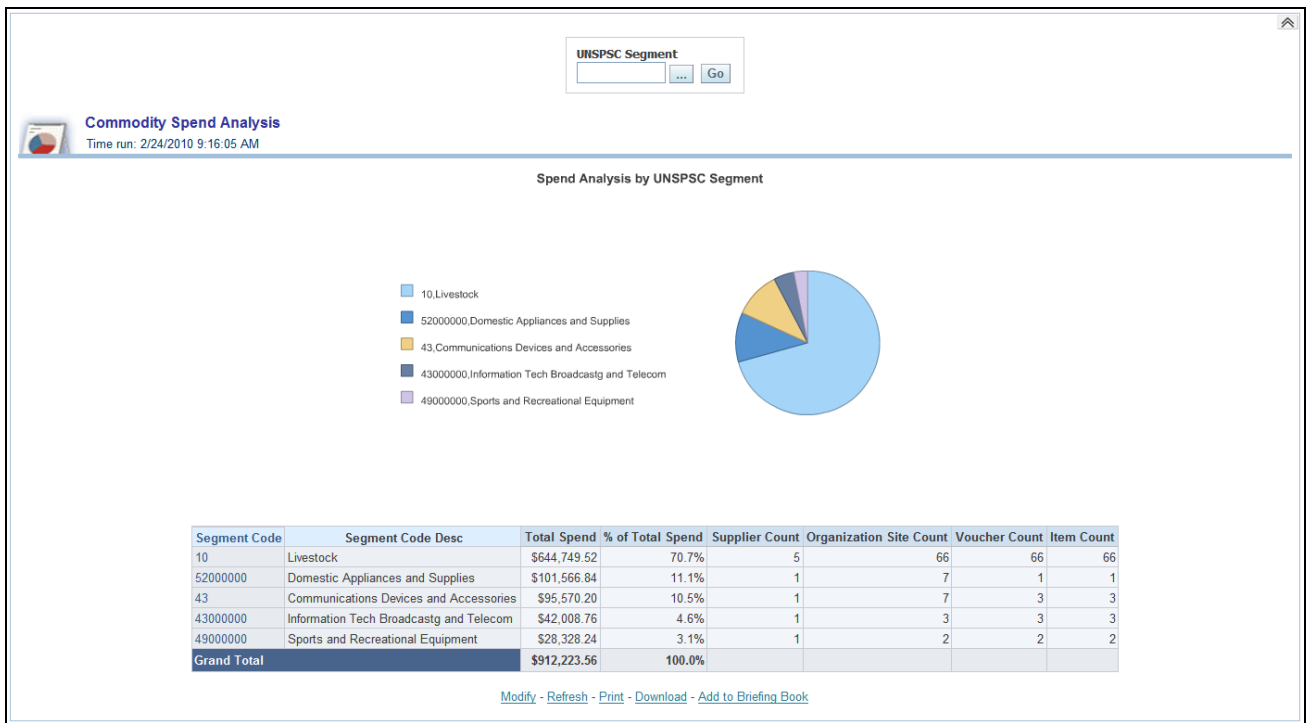


Spend Dashboard

| Usage   | Reports  | Dashboard Prompt   |
|---|--|--|
| Provides an overview of spending by commodity, supplier and organization. | <div>This dashboard is comprised of the following reports:</div> <ul style="list-style-type: none"><li>Commodity Spend Analysis report</li><li>Supplier Spend Analysis report</li><li>Organization Spend Analysis report</li></ul> | <div>Use the Spend dashboard prompt to filter dashboard results by:</div> <ul style="list-style-type: none"><li>Buyer</li><li>Invoice Date (this filter requires that you specify a time range using the two date prompts)</li></ul> |

## Commodity Spend Analysis Report

Access the Commodity Spend Analysis report, which provides you with information about the goods and services your organization has purchased, including Total Commodity Spend, Percent of Total, and Invoice Count measures.



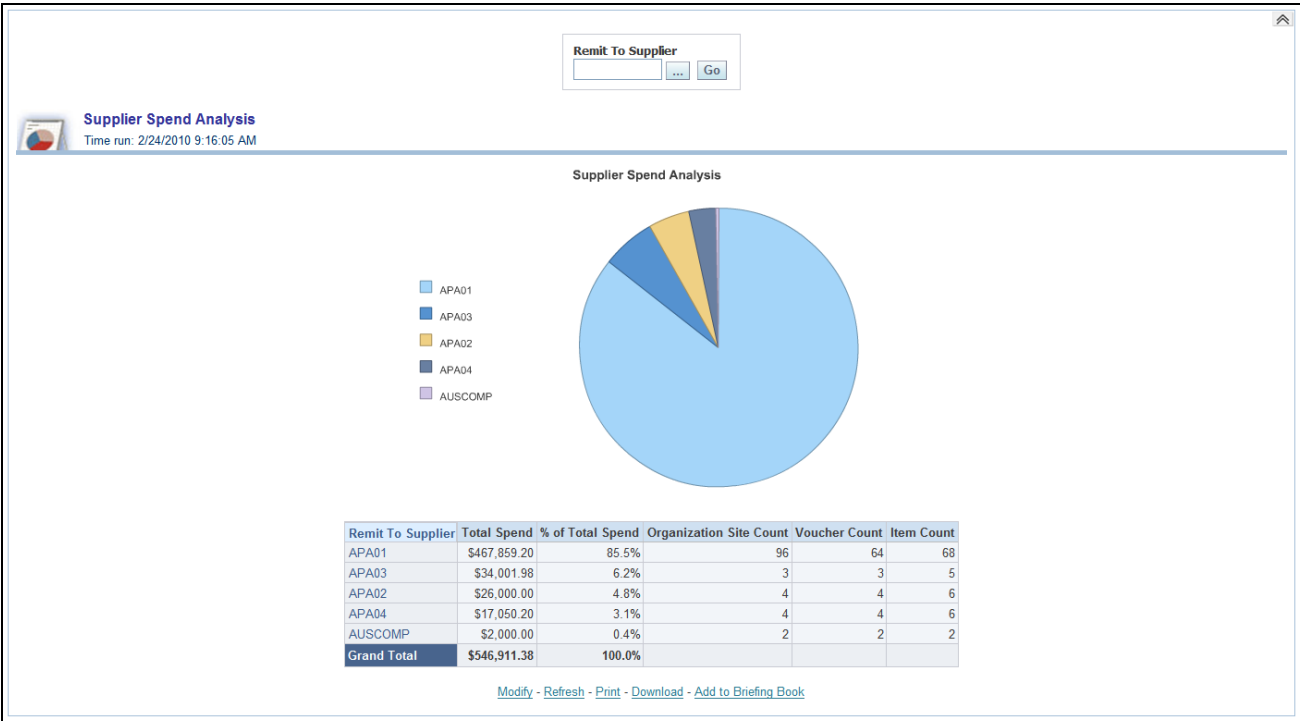
## Commodity Spend Analysis Report

The pie chart displays total commodity spend data grouped by *UNSPSC Segment*, which can be toggled using the UNSPSC Segment prompt.

You can click on a pie slice to drill down to individual segment-level data.

## Supplier Spend Analysis Report

Access the Supplier Spend Analysis report, which provides you with information about the suppliers your organization uses to purchase goods and services, and includes measures such as Total Supplier Spend, Percent of Total, and Buyer Count.



Supplier Spend Analysis Report

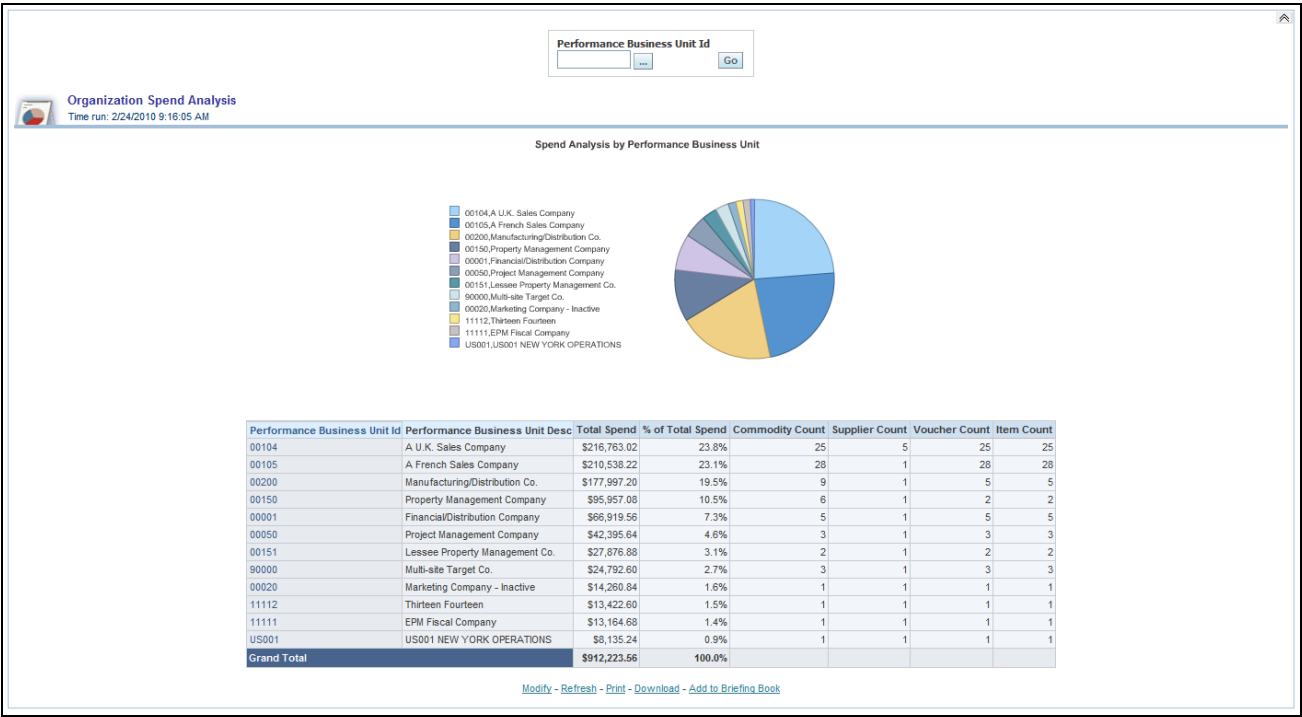
The pie chart displays total supplier spend data grouped by *Remit to Supplier*, which can be toggled using the Remit to Supplier prompt.

You can click on a pie slice to drill down to individual supplier-level data.

Organization Spend Analysis Report

Access the Organization Spend Analysis report, which provides total expenditure information for goods and services for your organization.





Organization Spend Analysis Report

The pie chart displays total organization spend data grouped by *Performance Business Unit*, which can be toggled using the Performance Business Unit ID prompt.

You can click on a pie slice to drill down to individual business unit level data.



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