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PeopleSoft EPM 9.1 Fusion Campus Solutions Intelligence for PeopleSoft PeopleBook

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PeopleSoft EPM 9.1 Fusion Campus Solutions Intelligence for PeopleSoft PeopleBook
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Contents

Oracle's Fusion Campus Solutions Intelligence for PeopleSoft 9.1 Preface

This chapter discusses:

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

Oracle's Fusion Campus Solutions Intelligence For PeopleSoft Products

This PeopleBook refers to these PeopleSoft EPM warehouses:

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

Related Documentation

The Fusion Campus Solutions Intelligence for PeopleSoft PeopleBook provides you with implementation information for the Fusion Campus Solutions Intelligence for PeopleSoft 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:

Document	***Description***
Oracle Business Intelligence Infrastructure Installation and Configuration Guide	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. **Note.** The Oracle Business Intelligence Infrastructure Installer installs the platform components, not the applications components. Refer to the *Fusion Campus Solutions Intelligence For PeopleSoft Supplemental Installation Instructions* to install the Fusion Campus Solution Intelligence application.
Oracle Business Intelligence Server Administration Guide	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.
Oracle Business Intelligence Presentation Services Administration Guide	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.
Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide	This guide is for Oracle BI report and dashboard designers and end users of the Fusion Campus Solution Intelligence application.
PeopleSoft Enterprise Performance Management Installation Guide	Chapter 3 of this guide, "Installing Oracle Fusion Campus Solutions Intelligence for PeopleSoft" discusses how to install the components that are required to run the Fusion Campus Solution Intelligence application.
PeopleSoft Campus Solutions Warehouse PeopleBook	This book provides information necessary to implement the Campus Solutions Warehouse.
PeopleSoft Customer Relationship Management Warehouse PeopleBook	This book provides information necessary to implement the Customer Relationship Management Warehouse.
PeopleSoft Financial Management Solutions Warehouse PeopleBook	This book provides information necessary to implement the Financial Management Solutions Warehouse.
PeopleSoft Human Capital Management Warehouse PeopleBook	This book provides information necessary to implement the Human Capital Management Warehouse.

Document	*Description*
PeopleSoft Supply Chain Management Warehouse PeopleBook	This book provides information necessary to implement the Supply Chain Management Warehouse.

Note. This PeopleBook documents only the delivered metadata, dashboards, reports, subject areas, and security setup for the Fusion Campus Solutions Intelligence for PeopleSoft 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.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online 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 locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

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.

Dimensions	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.
Facts	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.
Filters and Prompts	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. 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. See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, "Filtering Requests in Oracle BI Answers."
Folders	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.
Guided Navigation	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.
Key Performance Indicators (KPIs)	Strategic organizational factors that are used for reporting. KPIs are designed to monitor performance on strategic organizational factors such as enrollment or tuition amount.
Oracle Business Intelligence Answers (Oracle BI Answers)	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.
Oracle Business Intelligence Enterprise Edition (OBIEE)	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.
Oracle Business Intelligence Delivers (Oracle BI Delivers)	A proactive intelligence solution that provides business activity monitoring and alerting for out-of-tolerance situations to target owners and subscribers.

Oracle Business Intelligence Interactive Dashboards (Oracle BI Interactive Dashboards)	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.
Oracle Business Intelligence Presentation Catalog (Oracle BI Presentation Catalog)	A collection of subject areas that are defined in the metadata repository layer.
Requests (Reports)	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

This chapter discusses:

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

Fusion Campus Solutions Intelligence for PeopleSoft 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 Campus Solutions Warehouse
- PeopleSoft Customer Relationship Management (CRM) Warehouse
- PeopleSoft Financial Management Solutions (FMS) Warehouse
- PeopleSoft Human Capital Management (HCM) Warehouse
- PeopleSoft 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.

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

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

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

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

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

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

Fusion Campus Solutions Intelligence for PeopleSoft 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 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 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 application with the EPM database. You must complete the installation of this software before you implement the Fusion Campus Solutions Intelligence application:

- PeopleSoft Campus Solutions Warehouse 9.1.

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

- Oracle Business Intelligence Enterprise Edition, release 10.1.3.4.1.

  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."

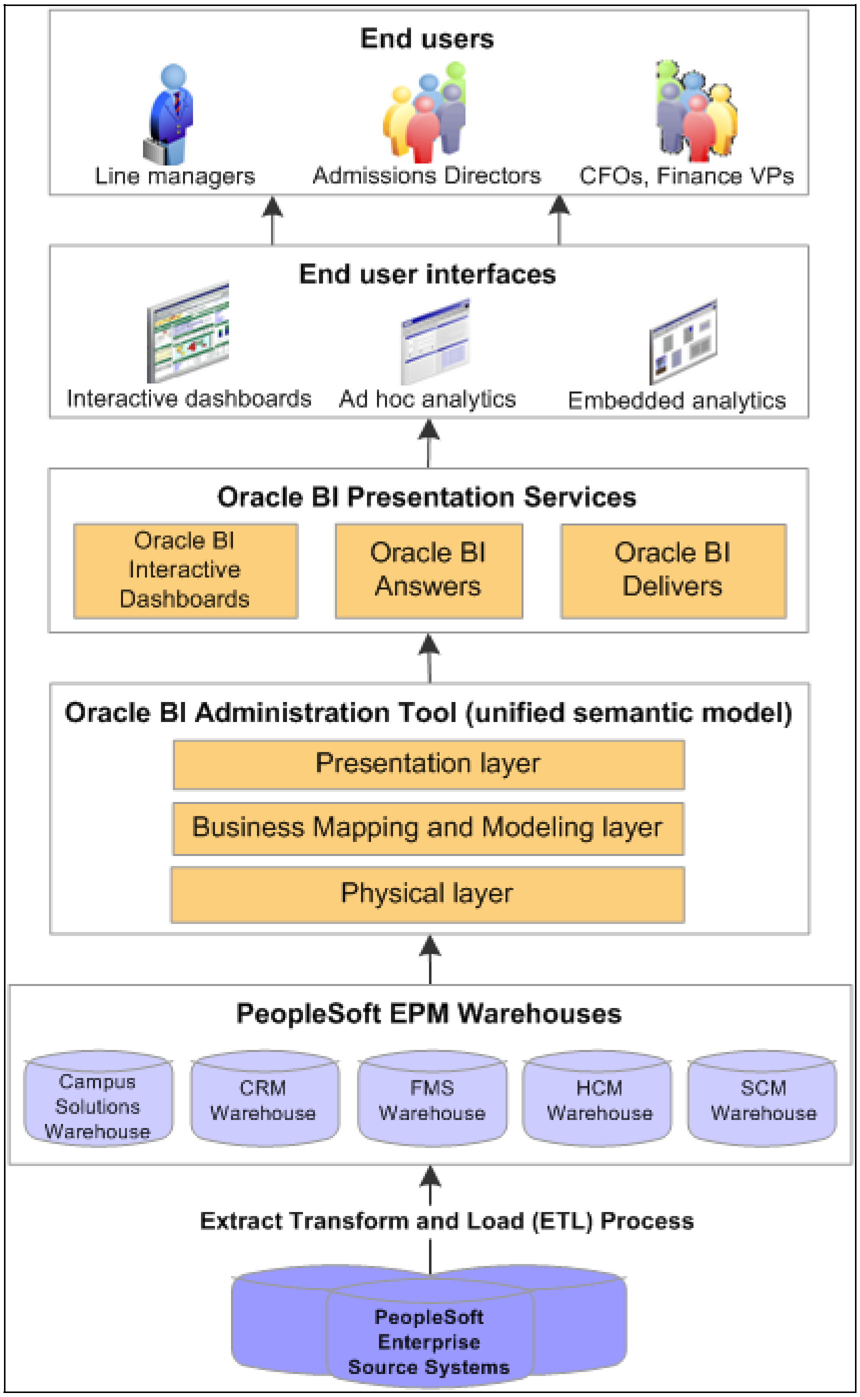
Fusion Campus Solutions Intelligence Application Setup

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.

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

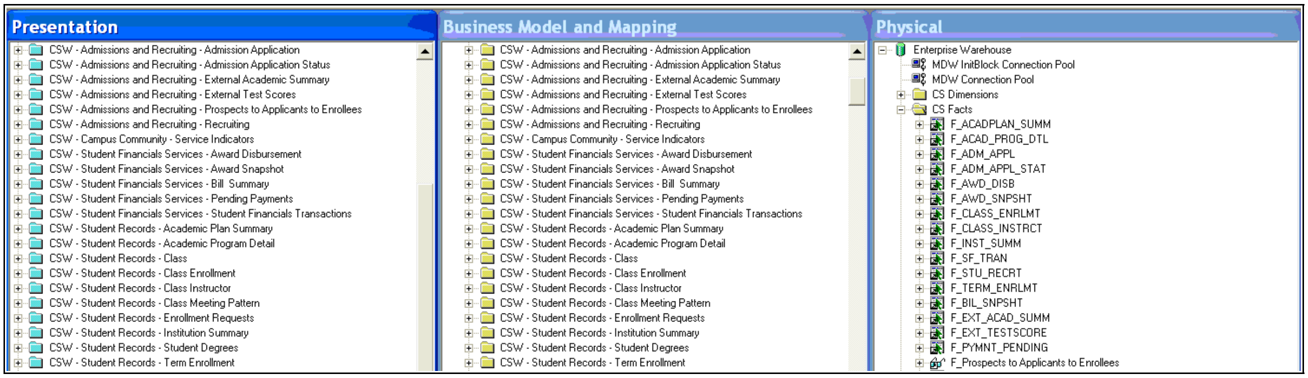
This section discusses the:

- 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:

Property	***Value***
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:

Name	***Query***	***Variable Name***	***Type***
Admission Application PIA page	`SELECT A.URI || B.URL 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'`	ADM_APPL_PROG_MNT_PG	Dynamic Repository
Job Summary PIA page	`SELECT A.URI || B.URL 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= 'JOB_SUMMARY'`	JOB_SUMMARY_PG	Dynamic Repository

Name	***Query***	***Variable Name***	***Type***
Journal Entries PIA page	`SELECT A.URI || B.URL FROM PS_SRC_CONFIG A, PS_SRC_COMPONENT B WHERE A.SRC_SYS_ID = B.SRC_SYS_ID AND A.SRC_SYS_ID = 'FSCM' AND B.COMPONENT_ID= 'JOURNAL_ENTRY'`	JOURNAL_ENTRY_PG	Dynamic Repository
Overdue Scheduled Payments PIA page	`SELECT A.URI||B.URL FROM PS_SRC_CONFIG A, PS_SRC_COMPONENT B WHERE A.SRC_SYS_ID= B.SRC_SYS_ID AND A.SRC_SYS_ID='FSCM' AND B.COMPONENT_ID= '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.

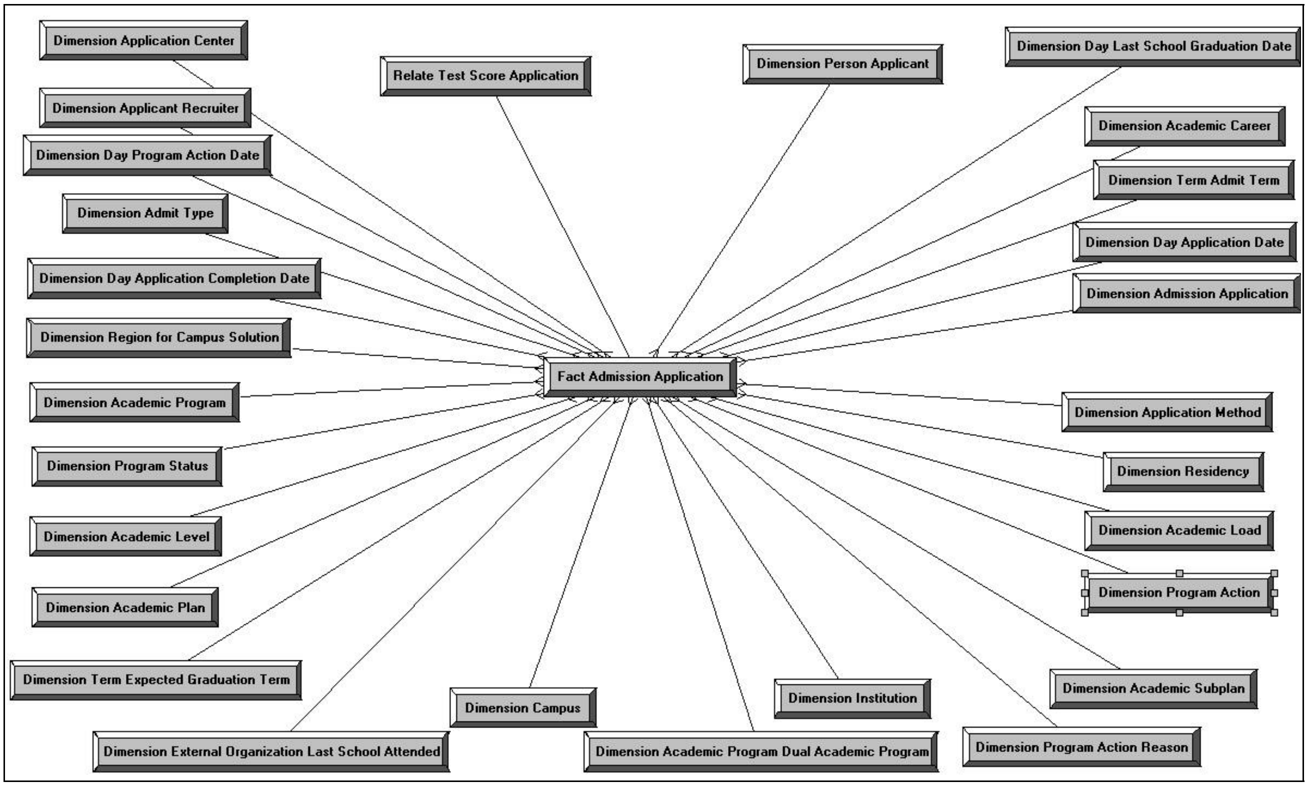
Business Model and Mapping Layer

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:

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

Campus Solutions Warehouse Data Mart	*Subject Area*
Admissions and Recruiting	Admission Application Admission Application Status Admission Funnel Application Evaluation Student Recruiting Application Test Scores External Academic Summary External Test Scores Prospects to Applicants to Enrollees Recruiting Student Responses
Campus Community	Campus Events Event Meetings Organization Check List Organization Communications Person Check List Person Communications Service Indicators

Campus Solutions Warehouse Data Mart	***Subject Area***
Student Financial Services	Award Disbursement Award Snapshot Bill Summary Credit History Payment and Charges Cross Reference Payment Summary Student Financials Accounting Line Student Financials Payment Details Student Financials Transactions Student Financials Transactions Details
Student Records	Academic Plan Summary Academic Program Detail Class Class Enrollment Class Instructor Class Meeting Pattern Enrollment Requests Institution Summary Student Degrees Term Enrollment

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

See Chapter 5, "Working with Delivered OBIEE Dashboards for the Campus Solutions Warehouse," page 55 .

Financial Management Solutions

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

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

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

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

See Chapter 7, "Working with Delivered OBIEE Dashboards for the Financial Management Solutions (FMS) Warehouse," page 157.

Human Capital Management

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

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

HCM Warehouse Data Mart	***Subject Area***
Workforce	Benchmark Survey Disciplinary Action Employee Job Grievance Injury Illness Time And Labor Workforce Movement Activity Workforce Profile

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

See Chapter 8, "Working with Delivered OBIEE Dashboards for the Human Capital Management (HCM) Warehouse," page 195.

Supply Chain Management

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

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

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

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

See Chapter 9, "Working with Delivered OBIEE Dashboards for the Supply Chain Management (SCM) Warehouse," page 275 and Chapter 9, "Working with Delivered OBIEE Dashboards for the Supply Chain Management (SCM) Warehouse," page 275.

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 contain 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*.

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:

Presentation Catalog groups	***Permissible Subject Area Folders***
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"

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:

OBIEE Report	***Report Column***	***Target Online Transaction Page***
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)

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.

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 prerequisites, overviews 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.

Prerequisites

The following software is required to set up security in the Fusion Campus Solutions Intelligence application:

- PeopleTools 8.52
- Oracle Business Intelligence Enterprise Edition 11g
- Oracle HTTP Server 11g (Oracle WebTier Utility)
- Oracle Identity Management 11g (an Oracle Fusion Middleware 11g application)
    - Oracle Access Manager (authentication engine for SSO)
    - Oracle Access Manager WebGates
    - Oracle Internet Directory (LDAP)

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:

Security Configuration	***Description***
User authentication	When a user logs into OBIEE to view or build dashboards and analysis, the system authenticates the user by using the Single Signon Server and the existing identity management scheme.
Dashboard object security	Users/Groups are mapped to Oracle BI Application Roles which control repository (subject areas, presentation tables, and presentation table columns) and presentation catalog (dashboards, reports, and catalog folders) privileges. When a user logs into the system, and the user's PeopleSoft security role matches an Oracle BI Server Application Role, the system automatically assigns the appropriate object permissions to the user. **Note.** When you create custom dashboards in OBIEE, you can restrict access to dashboards and dashboard pages, and other Presentation Catalog objects. Use the Oracle Fusion Middleware Control to restrict access to the underlying data.
Data access security	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 EPM applications by creating Oracle BI Server Application Roles 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 Application Role. 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.

These steps explain the general 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 (Oracle Internet Directory) 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 Application Role 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 Application Role 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.

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:

Subject Area	***Secured Dimension***
Campus Solutions	Academic Group Institution
Financial Management Solutions	Business Unit Department
Human Capital Management	Department
Supply Chain Management	Commodity Business Unit Accounts Payable

See Also

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

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 with their Application Roles 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 Identity Management 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 *PeopleSoft PeopleTools PeopleBook: Security Administration.*

See Also

Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1)

Configuring PeopleTools for LDAP Authentication

To configure the PeopleTools system for LDAP authentication, use the instructions in the *PeopleSoft 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 DNs (distinguished names) page (PeopleTools, Directory, Configure Directory, Additional Connect DN's) to specify connect DNs, 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 DNs 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 *PeopleSoft 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 application as a user with administrative rights, such as *VP1,* password *VP1,* 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 (Oracle Internet Directory)

See *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1),*Configuring Oracle BI to use Oracle Internet Directory, sections 3.2.1.1 through 3.2.1.4.

Registering PeopleSoft as a Partner Application with Oracle Access Manager 11g (SSO)

See *Oracle Fusion Middleware Administrator's Guide for Oracle Access Manager 11g Release 1 (11.1.1),* "Registering Partners (Agents and Applications) by Using the Console," to register PeopleSoft as a partner application with Oracle Access Manager 11g.

Registering OBIEE as a Partner Application with Oracle Access Manager 11g (SSO)

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

Configuring PeopleSoft for Single Signon with Oracle Access Manager 11g

To configure PeopleSoft for single signon with the Oracle Access Manager, complete the tasks that are discussed in this section.

See *PeopleSoft PeopleTools PeopleBook: Security Administration,* Implementing Single Signon, Implementing Oracle Access Manager as the PeopleSoft Single Signon Solution.

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

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

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

   See *PeopleSoft PeopleTools PeopleBook: PeopleTools Portal Technologies,* "Configuring the Portal Environment," Configuring Web Profiles, Configuring Portal Security.

3. 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 *PeopleSoft 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.

   ---

4. Modify *mod_wl_ohs.conf* file, located in <ORACLE_INSTANCE>/config/OHS/<componentName> to redirect users to the Oracle Single Signon page.

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

```
<Location /PORTAL>
   SetHandler weblogic-handler
   WebLogicHost <server name>
   WeblogicPort <port>
</Location>
```

Configuring OBIEE for Single Signon with Oracle Access Manager 11g

To configure OBIEE for single signon with Oracle Access Manager 11g, complete the tasks that are discussed in this section.

1. Change the Oracle OBIEE WebLogic Server authenticator from the default identity store (i.e. the embedded LDAP server) to the new identity store and new SSO provider.

   See *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1),* Enabling SSO Authentication, Configuring a New Authenticator for Oracle WebLogic Server.

   See *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1),* Enabling SSO Authentication, Configuring a New Identity Asserter for Oracle WebLogic Server.

2. Add the user name(s) from OID into the pre-existing BISystem Application Role and refresh users and group GUIDs

   See *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1),* Using Alternative Authentication Providers, Configuring a New Trusted User (BISystemUser).

   See *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1),* Using Alternative Authentication Providers, Regenerating User GUIDs.

3. Enable OBIEE to accept SSO authentication

   See *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1),* Enabling SSO Authentication, Using Fusion Middleware Control to Enable SSO Authentication.

Setting Up Object-Level Security

This section discusses how to complete the following tasks to set up object-level security for the Fusion Campus Solutions Intelligence application. You can achieve object-level security by mapping users and groups to Application Roles with access to specific Oracle BI Administration Tool objects and Oracle BI Presentation Catalog objects.

Creating and Managing Users and Groups

Oracle Internet Directory (OID) is the authentication provider instead of the default the embedded WebLogic LDAP Server provided with OBIEE 11g. Creating and managing users and groups must be completed in OID.

See *Oracle Fusion Middleware Administrator's Guide for Oracle Internet Directory 11g Release 1 (11.1.1),* Getting Started With Oracle Internet Directory.

Mapping Users and Groups to Application Roles

After users and groups are created and mapped together, they will need to be mapped to Application Roles. *BIConsumers, BIAuthors,* or *BIAdministrators* are provided by default and have preconfigured privileges to access BI components (metadata repository and presentation catalog).

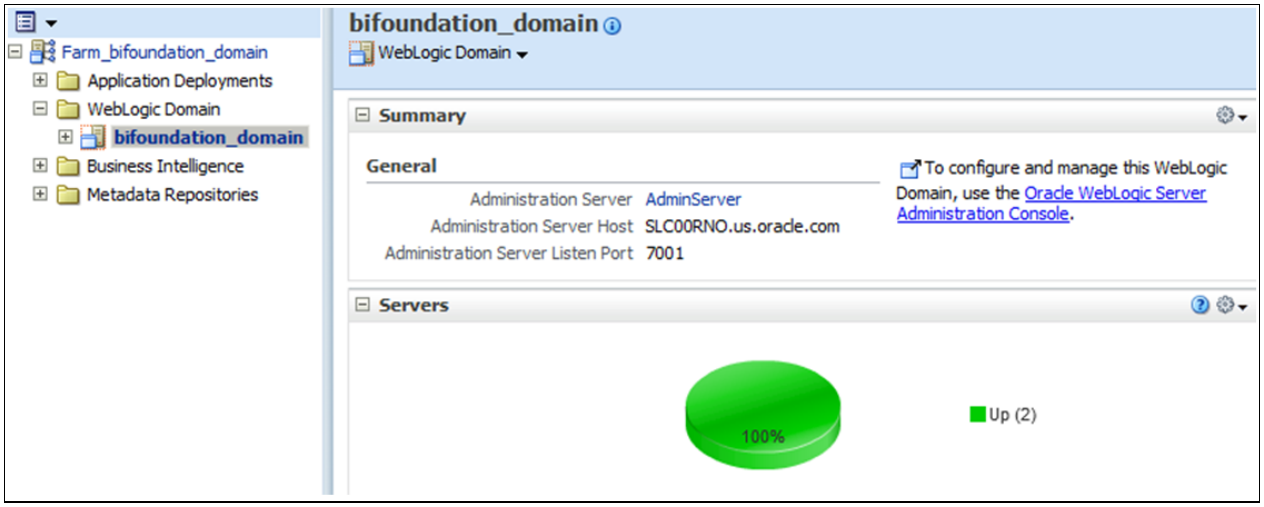
Note. New groups and Application Roles can be created if the defaults (BIConsumers, BIAuthors, or BIAdministrators) do not meet your business requirements.

To map users and groups to Application Roles:

1. Start the Oracle Enterprise Manager (for example, http://localhost:7001/em).

   The Fusion Middleware Control login page displays.

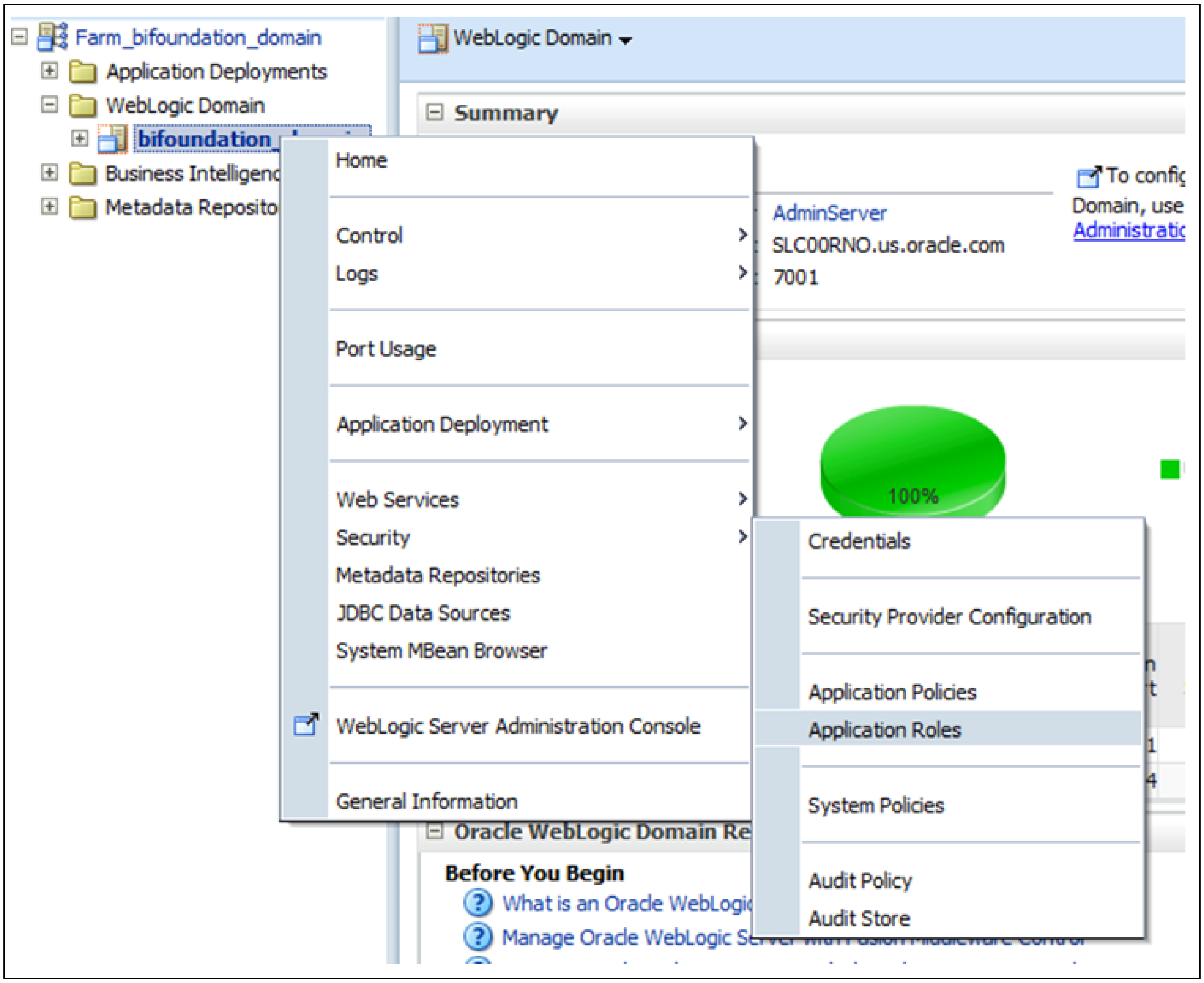
2. On the Fusion Middleware Control login page, enter the *Administrator* for the Administrator field and *welcome1* for the Password field, then click Login.



Oracle Enterprise Manager

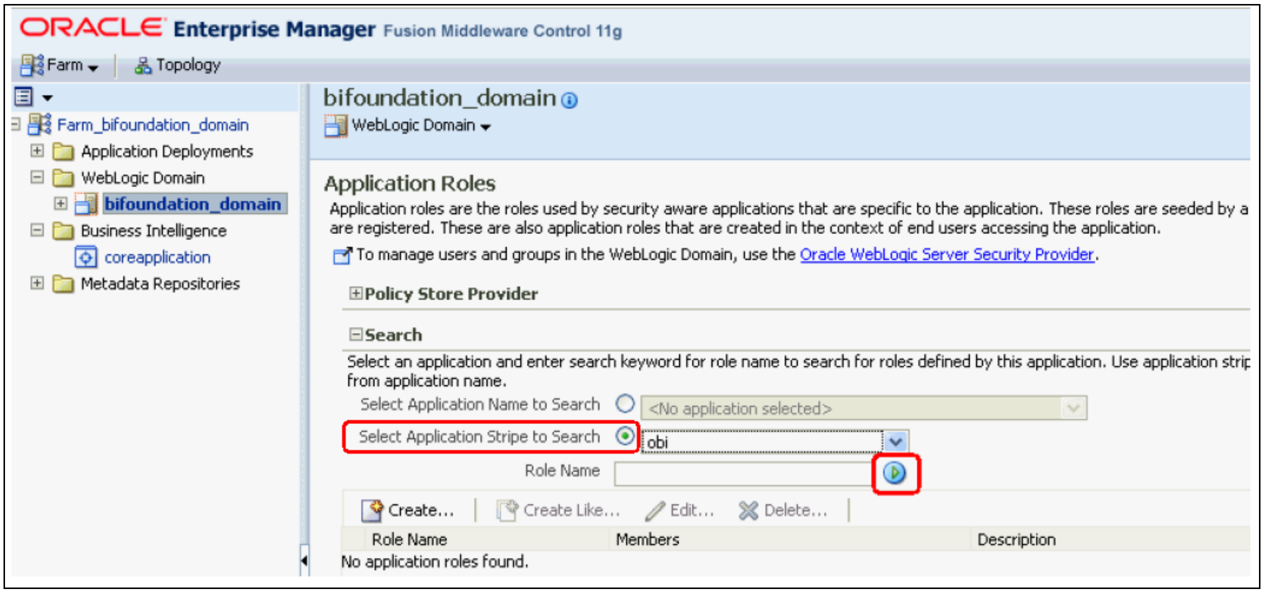
3. From the target navigation pane, expand the WebLogic Domain and right-click *bifoundation_domain.*

4. Select *Security* then *Application Roles.*



Oracle Enterprise Manager - Application Roles

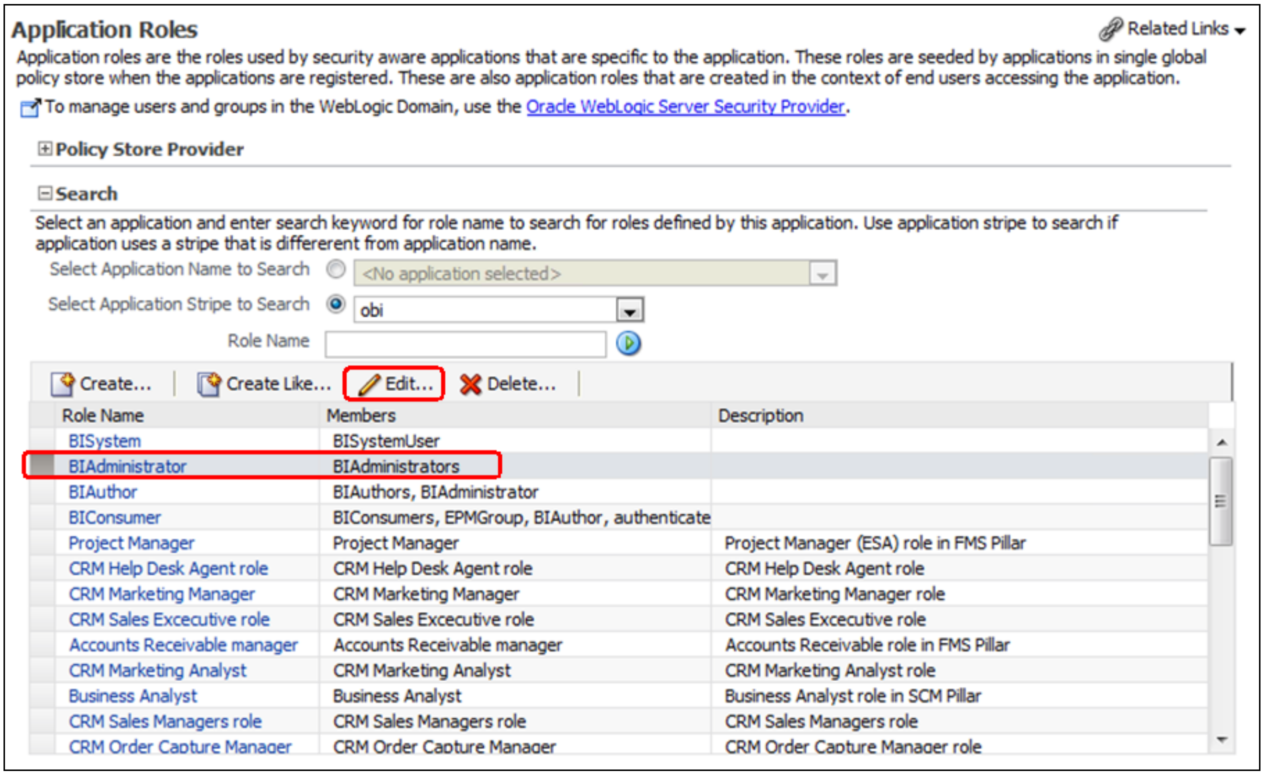
5. On the Application Roles page, select *Select Application Stripe to Search*, and select *obi* from the list.



Application Roles page - Application Stripe search

6. Click the Search icon (next to the Role Name field).

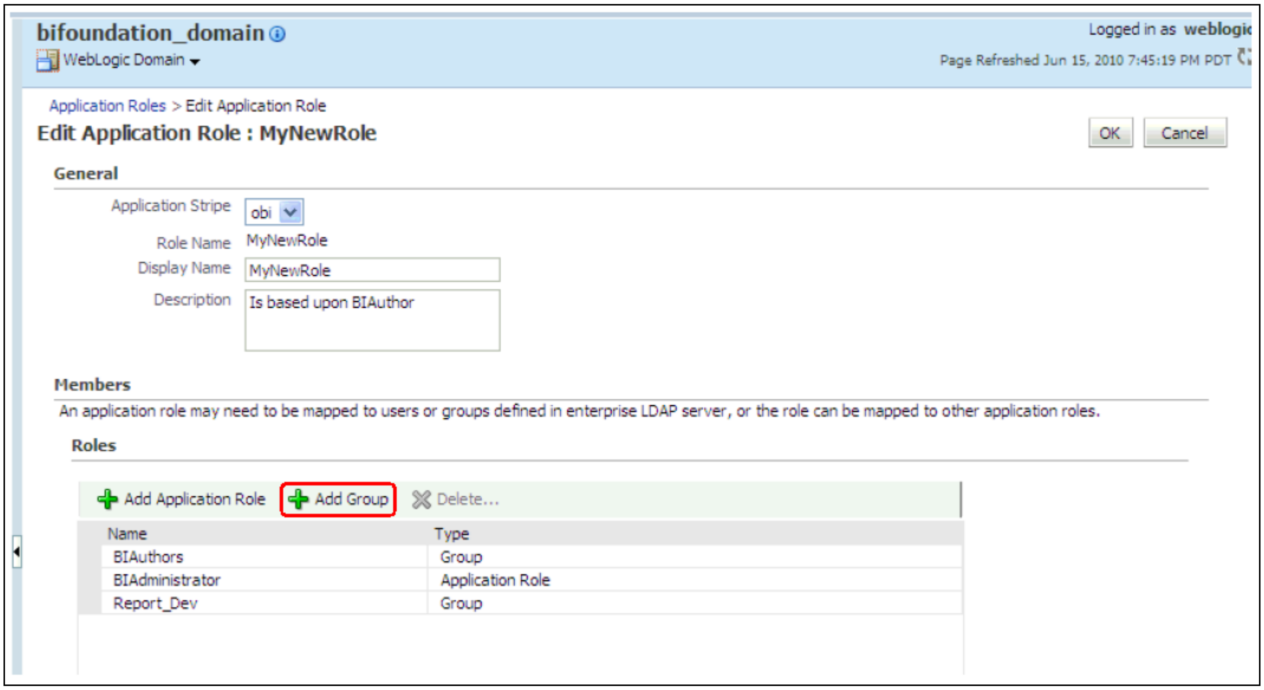
7. Select an application role in the list and click Edit.



Application Roles page - Application role

The Edit Application Role page displays.

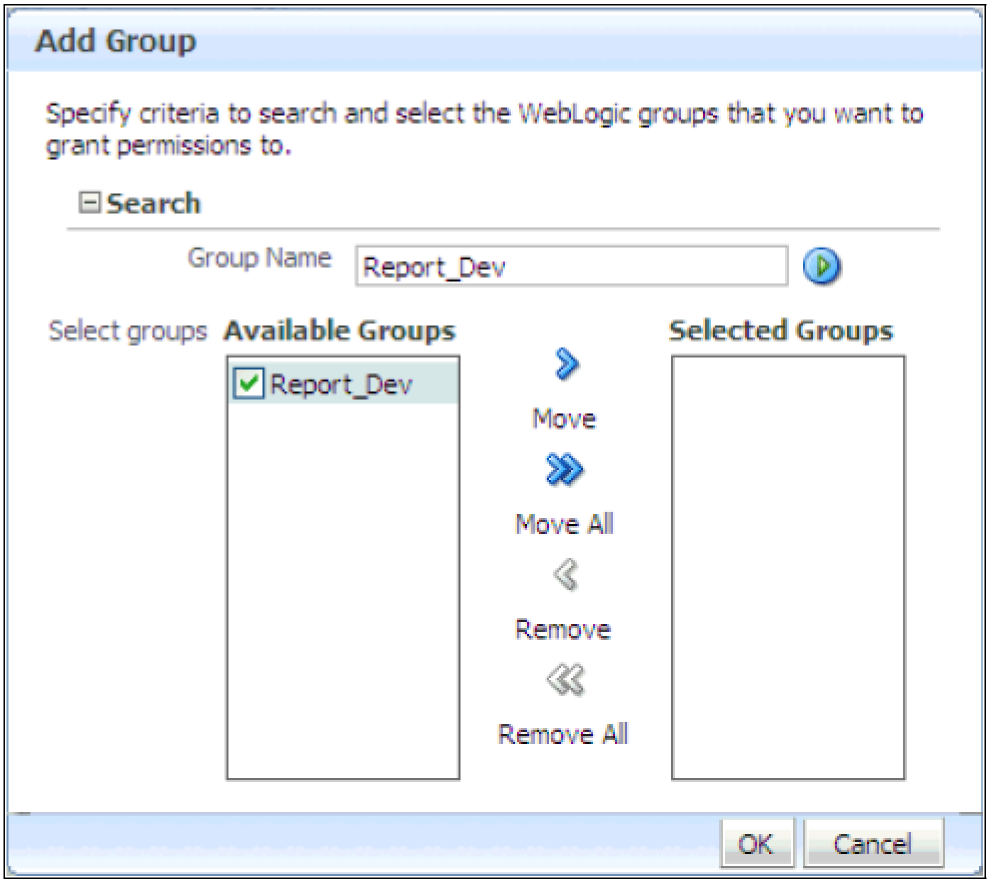
8. In the Edit Application Role page, click the Add Group icon.



Edit Application Role page

The Add Group page displays.

9. In the Add Group page, add the group that you want to assign to the Roles list



Add Group page

10. Click OK to continue, then click OK again on the Edit Application Role page.

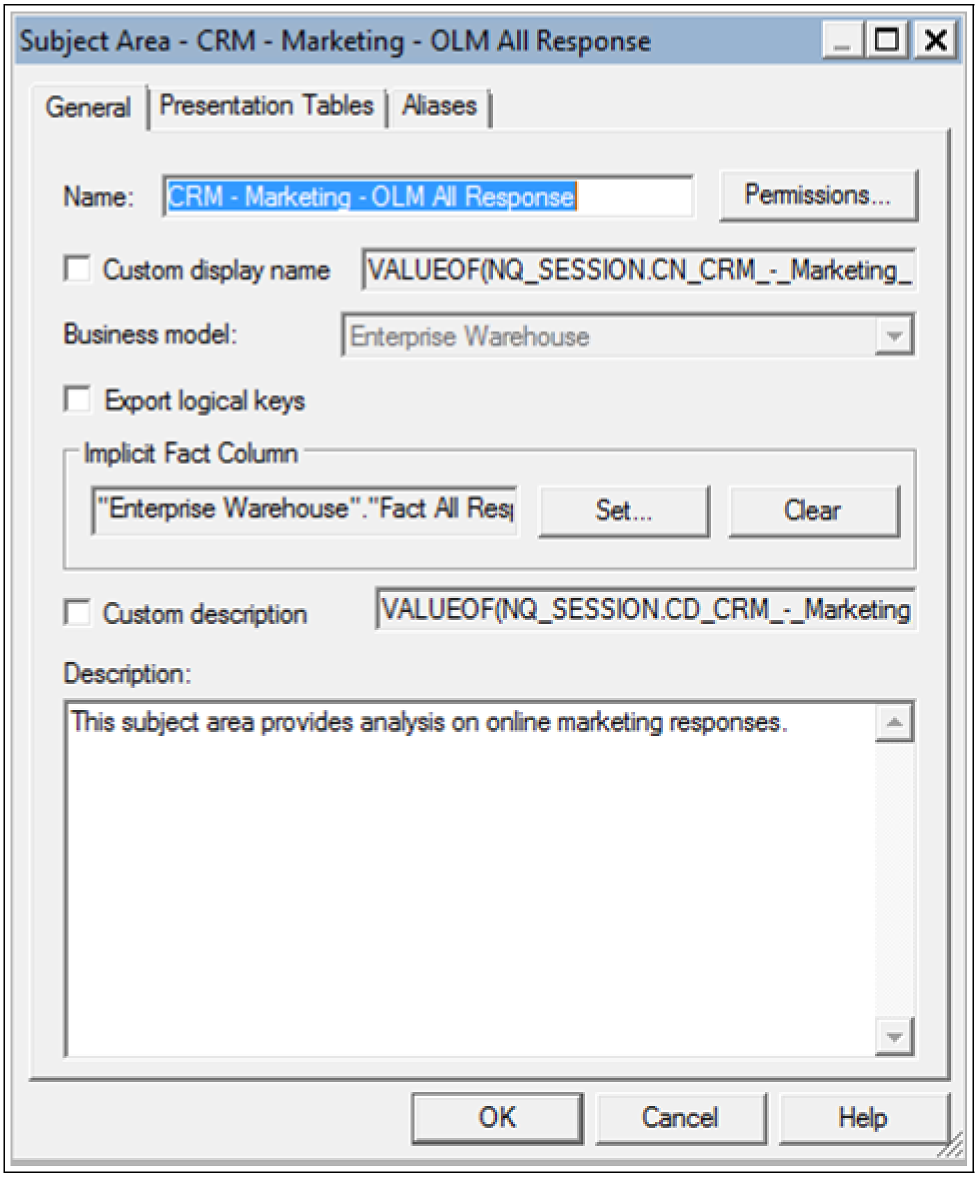
See *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1)*, Managing Security Using the Default Security Configuration, Creating and Managing Application Roles and Application Policies Using Fusion Middleware Control.

Managing Metadata Repository Privileges

To modify metadata repository privileges:

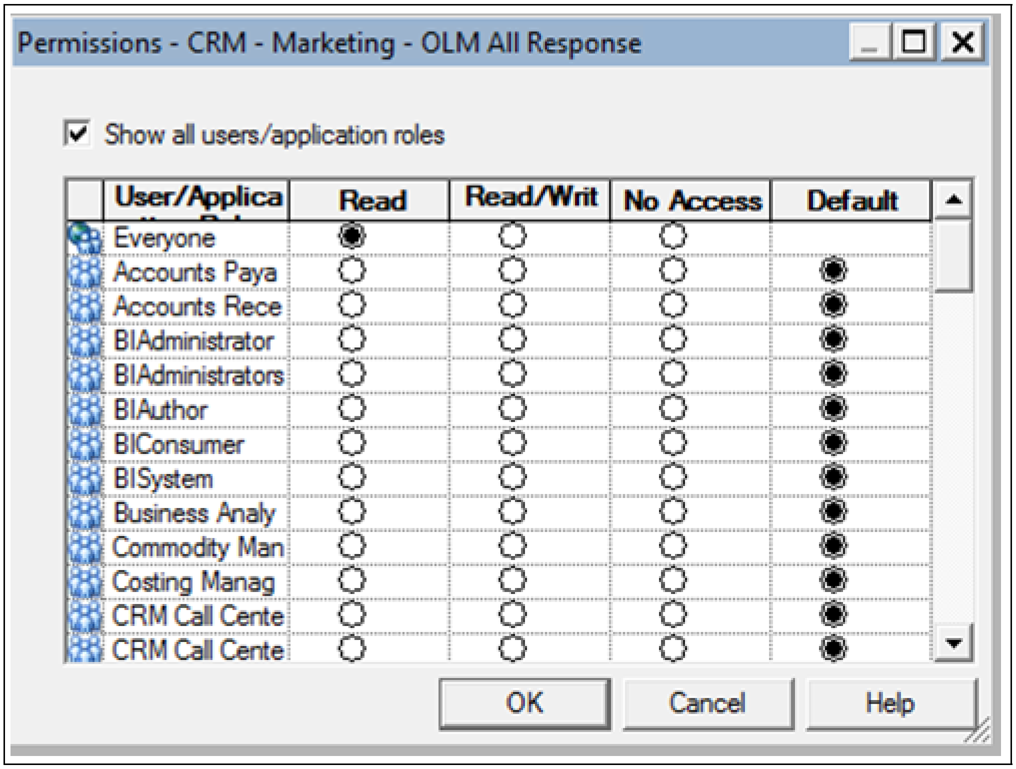
1. Open the repository in the Oracle BI Administration Tool.
2. In the Presentation panel, navigate to the subject area or sub-folder for which you want to set permissions.

3. Right-click the subject area and select Properties to display the properties dialog.



Properties Dialog

4. Click Permissions to display the Permissions dialog.



Permissions dialog

5. Select *Read, Read/Write, No Access,* or *Default* for each Application Role or user you wish to modify.

   It is best practice to only modify the Application Roles.

6. Click OK to continue, then click OK again on the properties dialog.

7. Save your changes.

See *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1),* Managing Security Using the Default Security Configuration, Managing Metadata Repository Privileges Using the Oracle BI Administration Tool.

Managing Presentation Services Catalog Privileges

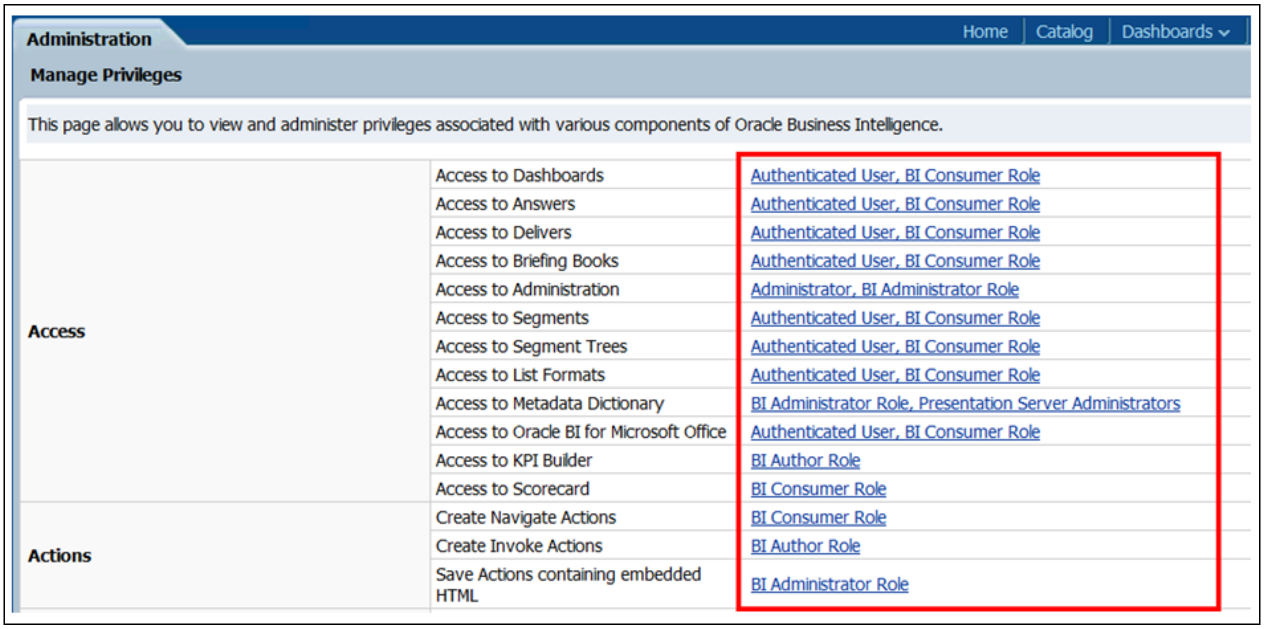
To modify presentation services catalog privileges:

1. Log in to Oracle Business Intelligence as a user with Administrator privileges.

2. From the Home page in Presentation Services, select Administration to display the Administration page.

3. In the Security area, select *Manage Privileges* to display the Manage Privileges page.

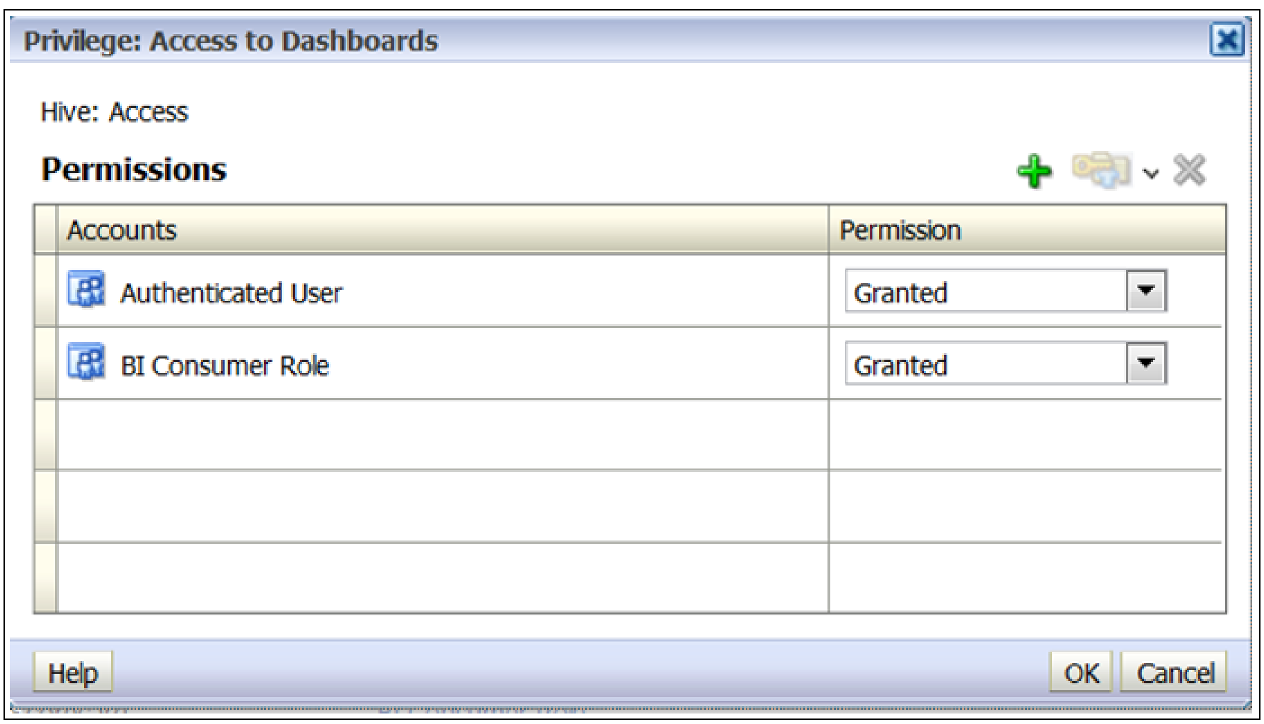
4. Click an Application Role next to the privilege that you want to edit.



Manage Privileges page

The Privilege page displays.

5. In the Privilege page, add or change permissions for an Application Role.



Privilege page

6. Click OK to save your changes.

See *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1)*, Managing Security Using the Default Security Configuration, Managing Metadata Repository Privileges Using the Oracle BI Administration Tool.

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 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.

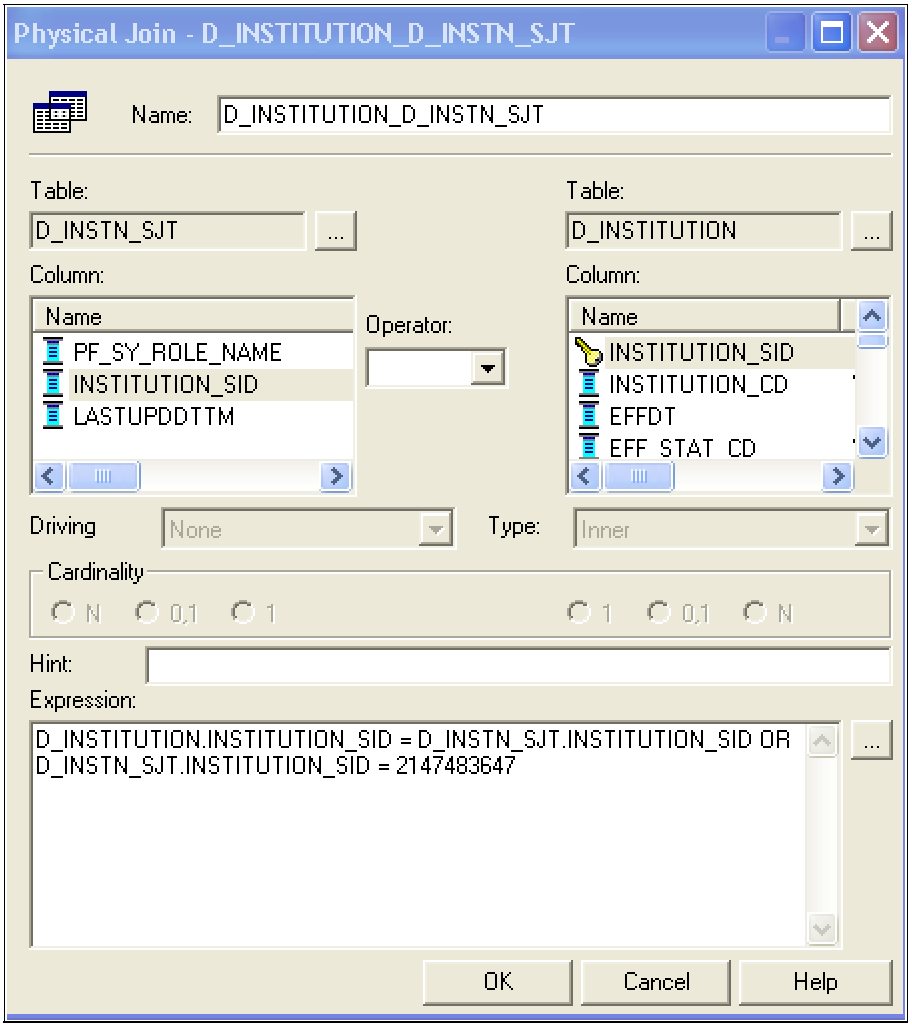
See *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*, "Setting Up EPM Infrastructure, Business Rules, and Security."

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.

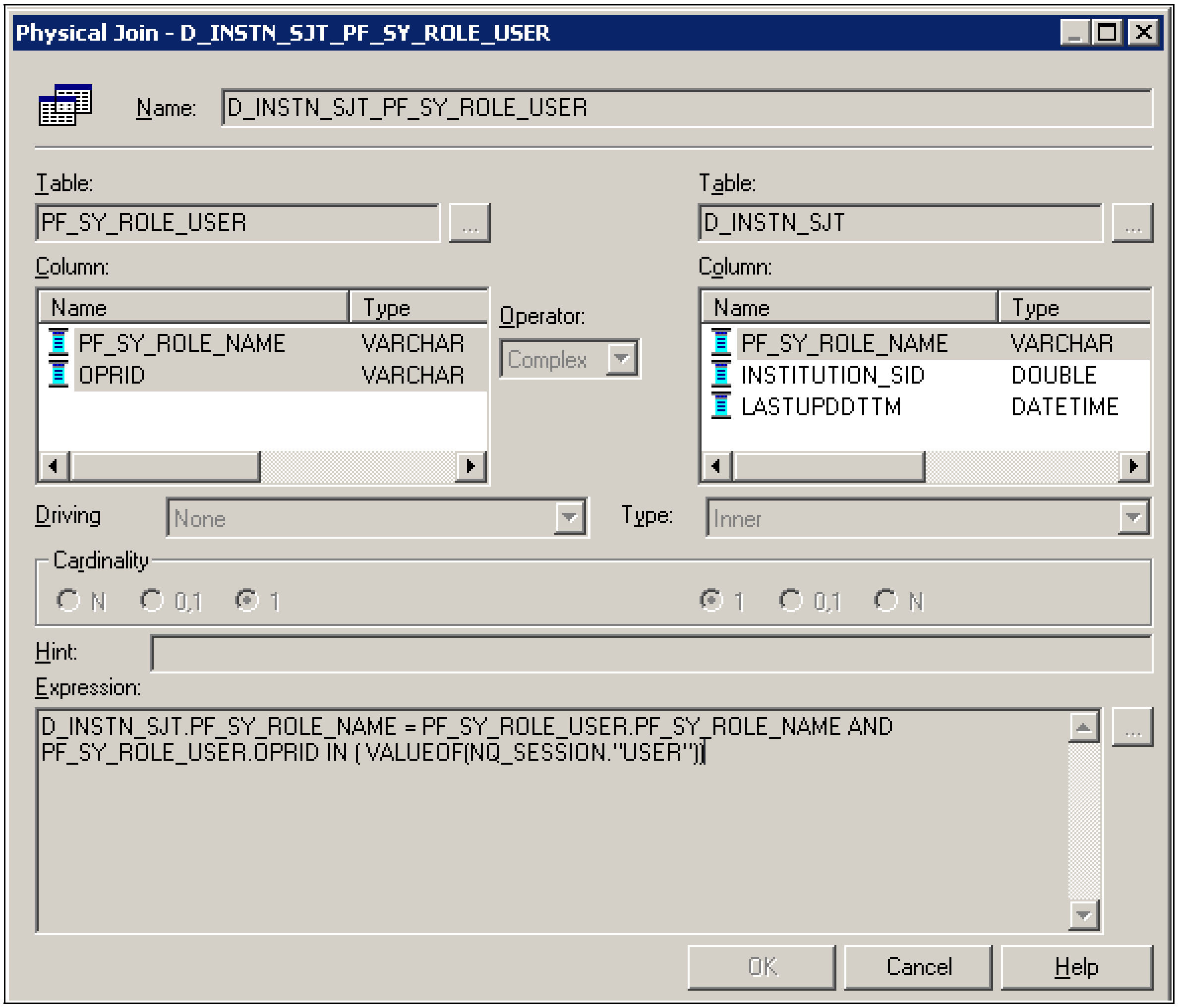
This is an example of the Physical Join page showing a join between a dimension table and its SJT:



Physical 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.

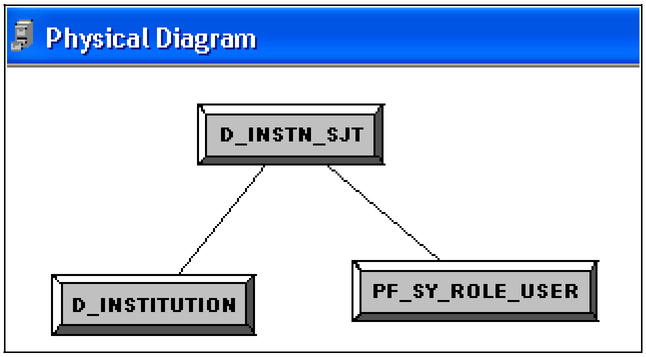
Following is an example of a physical join between the same SJT (D_INSTN_SJT) and the PF_SY_ROLE_USER table. Because SJT tables are populated with role information, this join will map the role to the enterprise user:



Physical 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:

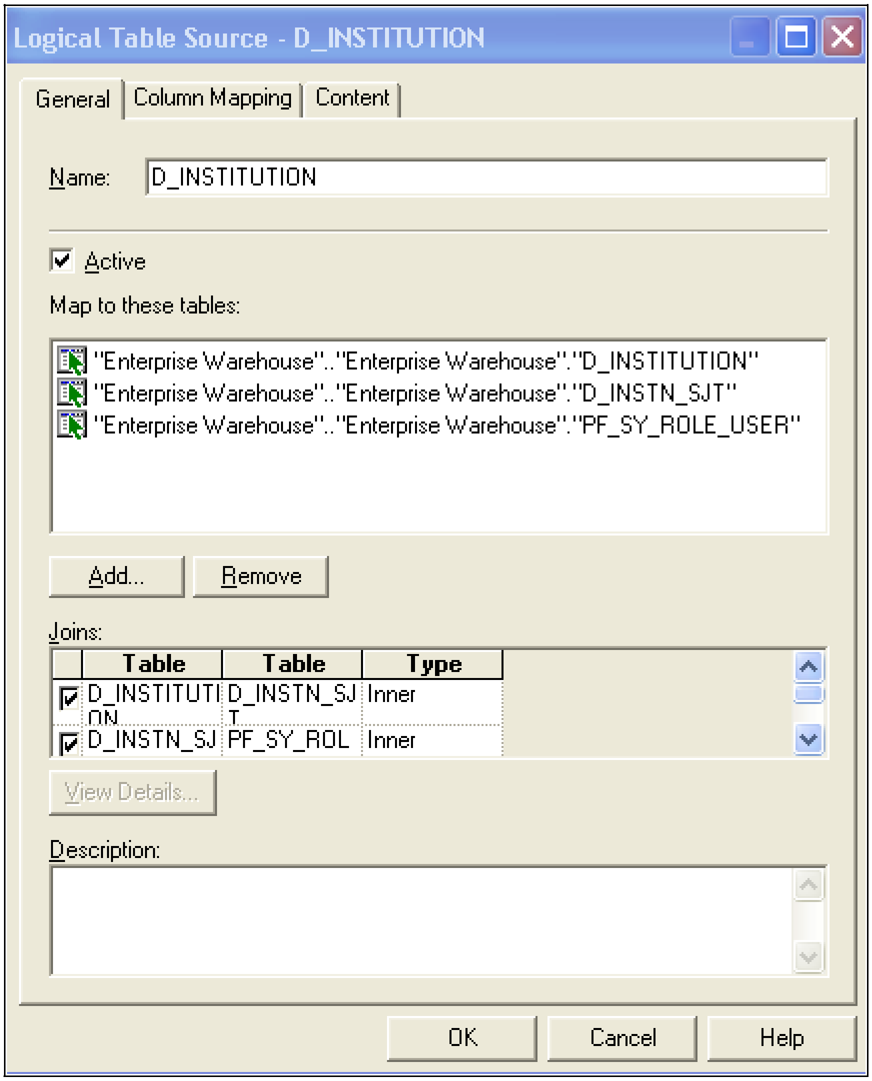


Physical Diagram page

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:



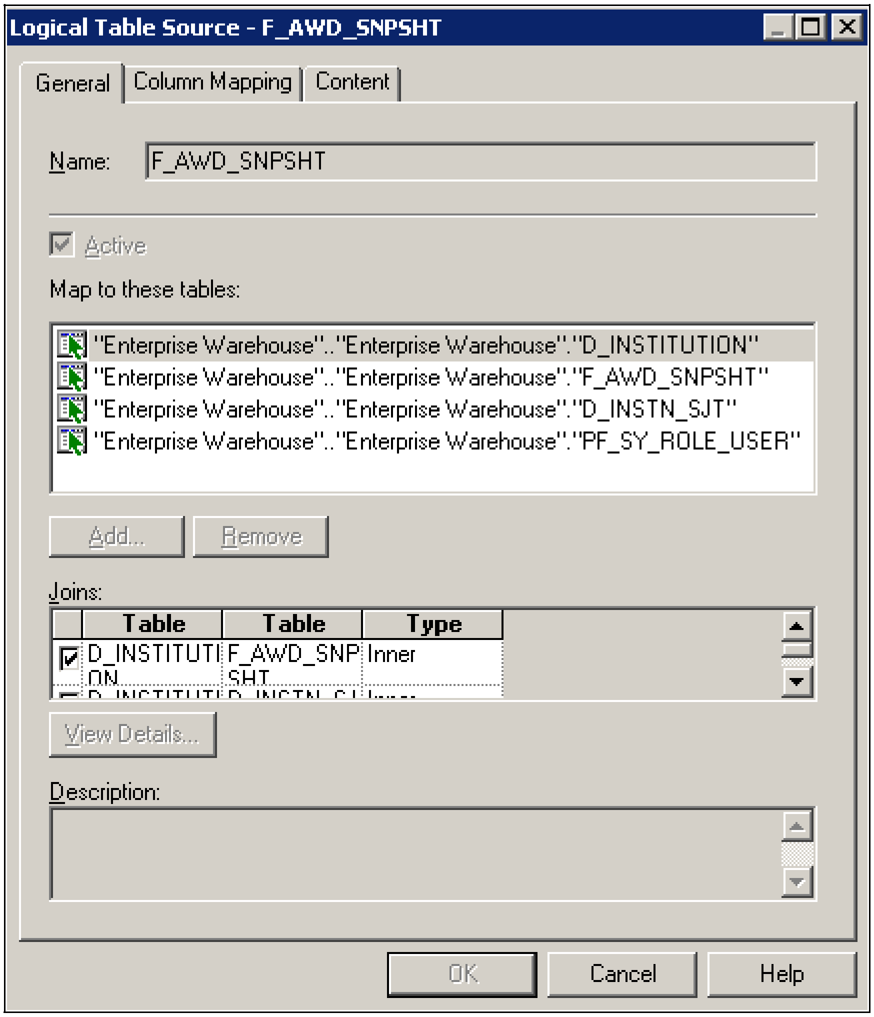
Business Model and Mapping - Logical Table Source page (example 1 of 3)

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:



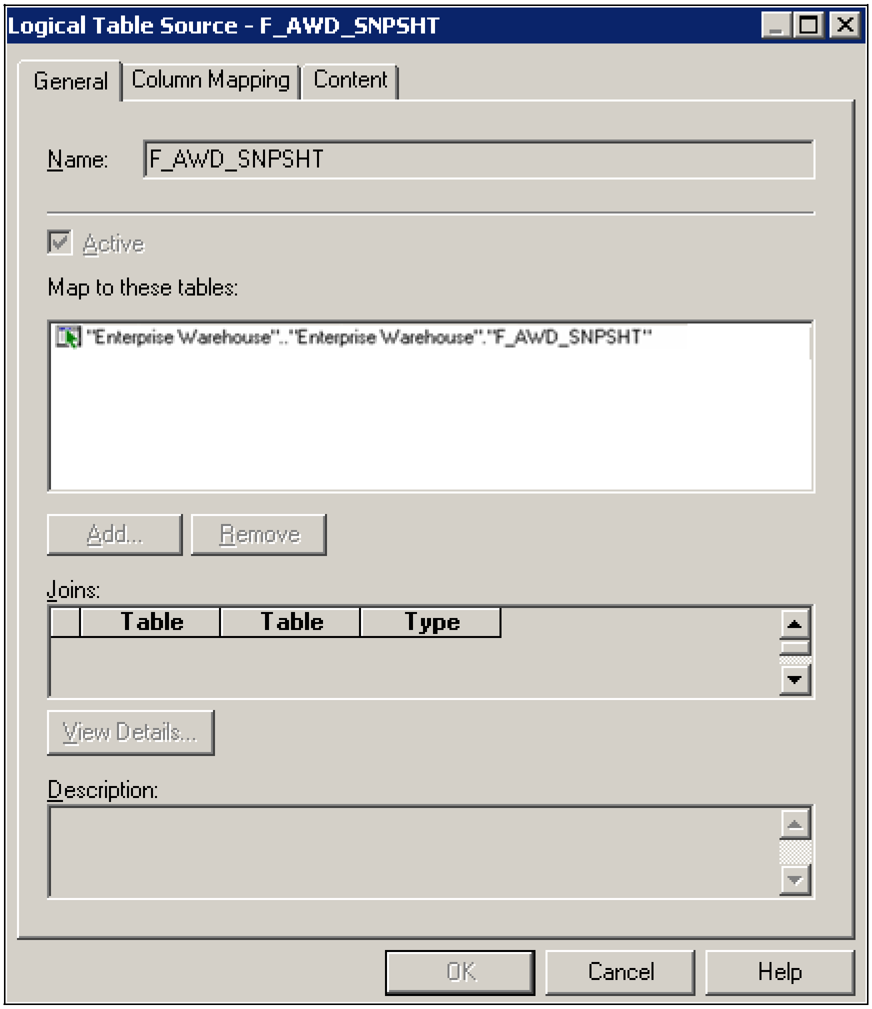
Business Model and Mapping layer - Logical Table Source page (example 2 of 3)

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:

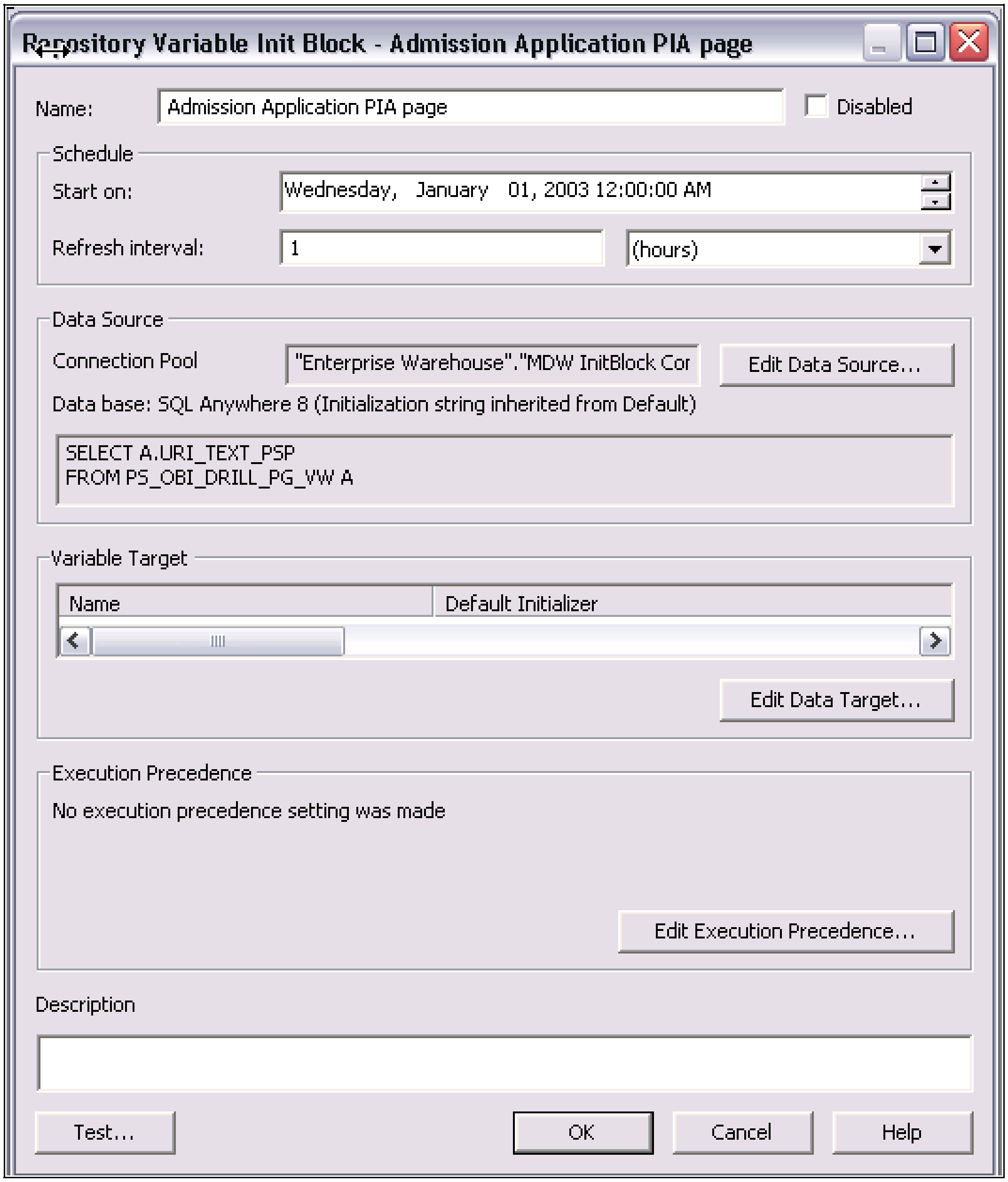
  ```
  INSERT INTO PS_SRC_COMPONENT
  VALUES ('HCM','ADM_APPL_PROG_MNT','CS ADMISSION APPLICATION
  PIA PAGE', '/EMPLOYEE/HRMS/C/PROCESS_APPLICATIONS.ADM_APPL_
  MAINTNCE.GBL?PAGE=ADM_APPL_PROG_MNT&EMPLID=&APPL_PROG_NBR=&
  ACAD_CAREER=&ADM_APPL_NBR=:1&INSTITUTION=:2&ADMIT_TERM=:3');
  ```

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

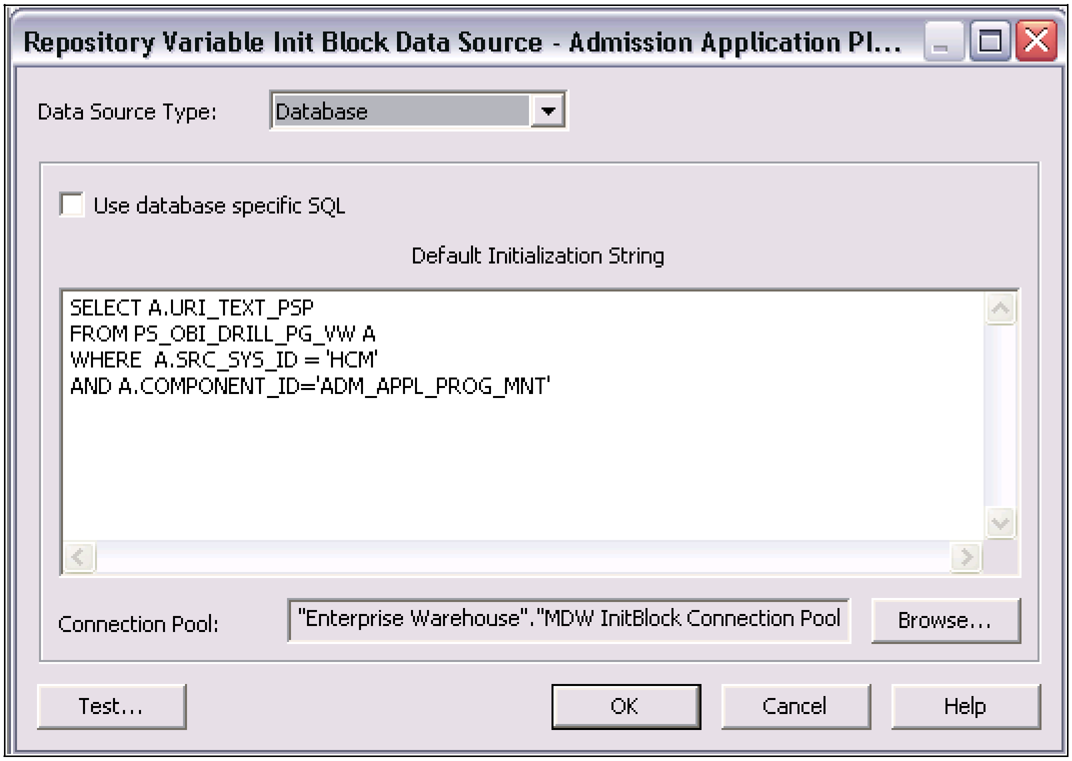
Creating Initialization Blocks and Dynamic Repository Variables

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.

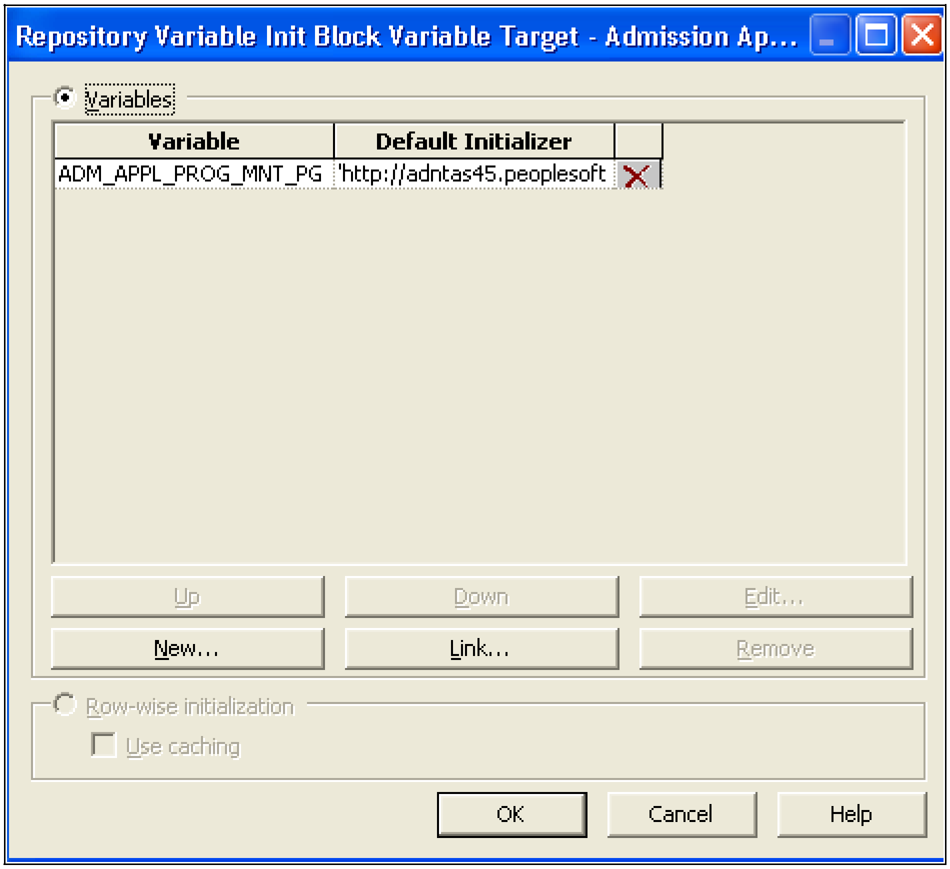
These are examples of the Repository Variable Initialization Block pages for the Admission Application page that is referenced in the previous example:



Repository Variable Init (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:

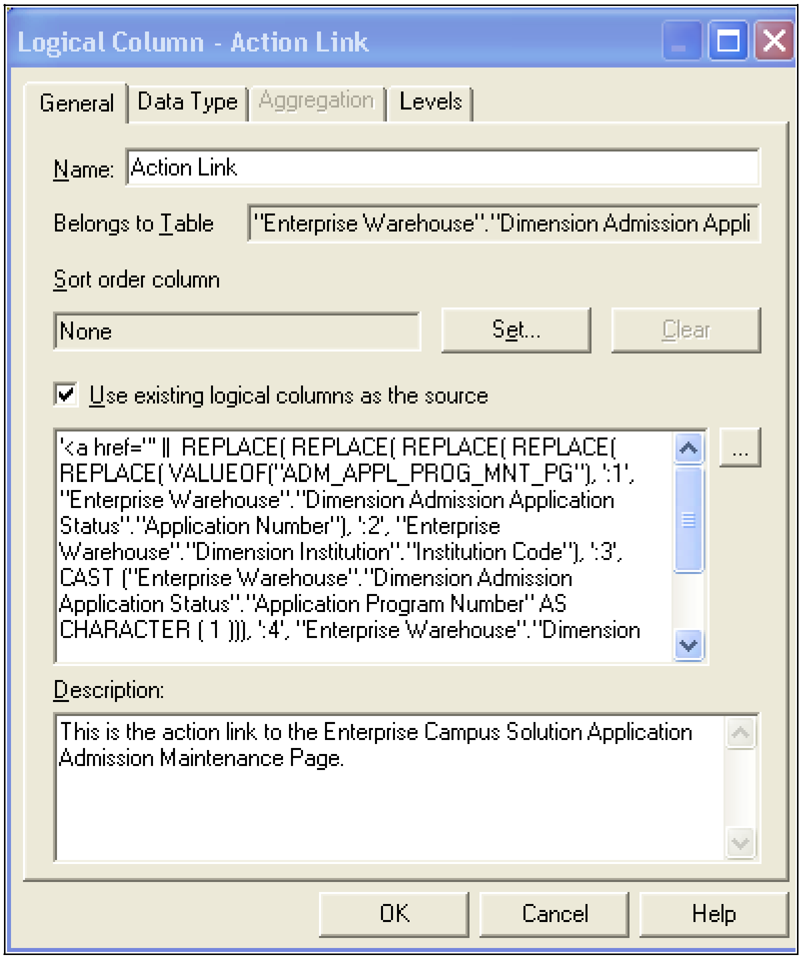
```
'http://adntas45.peoplesoft.com:
6300/psp/EM_HC890DV2_TS104539/EMPLOYEE/
HRMS/c/PROCESS_APPLICATIONS.ADM_APPL_
MAINTNCE.GBL?PAGE=ADM_APPL_PROG_MNT&
ADM_APPL_NBR=:1&INSTITUTION=:2&APPL_PROG_
NBR=:3&EMPLID=:4&ACAD_CAREER=:5'
```

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 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.

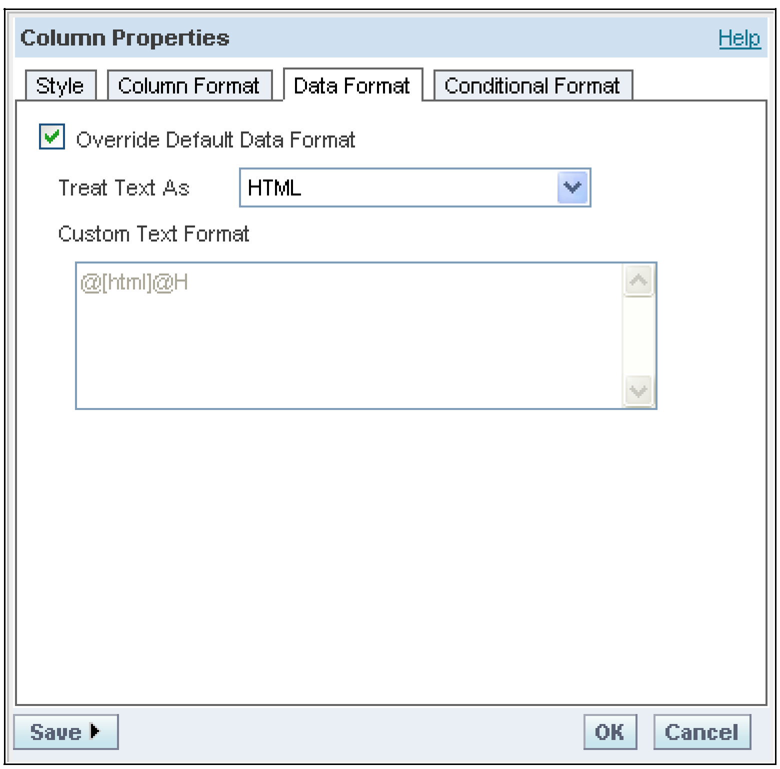
This is an example of setting up the Action Link logical column in the Business Model and Mapping layer so that you can drill to the Admission Application target page that is referenced in previous examples:


```
'<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.
- CRM: Recruiting and Admissions Dashboard - Overview Page
- CRM: Recruiting and Admissions Dashboard - Recruiting Campaign Effectiveness Page
- CRM: Recruiting and Admissions Dashboard - Retention Campaign Effectiveness Page
- CRM: Recruiting and Admissions Dashboard - Recruiting Performance Page
- CSW: Recruiting and Admissions Dashboard - Overview Page
- CSW: Recruiting and Admissions Dashboard - Recruiting Effectiveness Page
- CSW: Recruiting and Admissions Dashboard - Admission/Application Process Page
- CSW: Recruiting and Admissions Dashboard - Diversity Analysis Page
- CSW: Recruiting and Admissions Dashboard - Admissions Trend Analysis Page
- CSW: Student Administration Dashboard - Overview Page
- CSW: Student Administration Dashboard - Admissions and Recruiting Analysis Page
- CSW: Student Administration Dashboard - Student Records Analysis Page
- CSW: Student Administration Dashboard - Student Financials Analysis Page
- CSW: Institutional Research Dashboard - Student Enrollment
- CSW: Institutional Research Dashboard - Degree Completions
- CSW: Institutional Research Dashboard - Admissions

Prerequisites

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

- PeopleSoft Campus Solutions, which supplies transaction data to the Campus Solutions Warehouse.
- PeopleSoft EPM Campus Solutions Warehouse.
- For CRM: Recruiting and Admissions - Recruiting Performance reports, customers must be using the CRM Sales module and should be assigning individual Leads/Opportunities to respective recruiters.

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:

- CRM: Recruiting and Admissions Dashboard
- CSW: Recruiting and Admissions Dashboard
- CSW: Student Administration
- CSW: Institutional Research

CRM: Recruiting and Admissions Dashboard

Higher Education customers who are using PeopleSoft CRM for recruiting and admissions purposes will benefit from the CRM: Recruiting and Admissions Dashboard.

The Recruiting and Admissions Dashboard provides pages and reports that allow users to:

- Monitor different recruiting stages and statuses for constituents.
- Analyze recruiting campaign effectiveness and its return on investment.
- Analyze retention campaign effectiveness and its return on investment.
- Monitor the current state of recruitment and recruiting performance for individual recruiters and the recruiting team.

CRM Sales Module

The delivered CRM: Admissions Funnel Report assumes the use of the PeopleSoft CRM Sales module. The fact table used for the Admissions Funnel Report (F_CRM_FUNNEL_S) is designed for the business process of student recruitment spanning CRM Higher Education and Campus Solutions Applications for customers who will use the Sales module (for example, to create a lead for a prospect and assign a recruiter to the lead). The fact is used for the analysis of the Admissions Funnel report, recruiter performance, and sales team (recruiter team) performance.

For those customers who are not using the CRM Sales module, another fact named F_CRM_FUNNEL is provided. This fact is designed for the business process of student recruitment spanning CRM Higher Education and Campus Solutions Applications for customers who are not using the Sales module. You cannot analyze recruiting team or recruiter performance using this fact. The subject area for this fact is CSW – CRM for Higher Education Admissions Funnel.

CSW: Recruiting and Admissions 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.

CSW: Institutional Research Dashboard

As part of institutional reporting requirements—such as IPEDS, state requirements, and so forth—institutions must capture their data at specific points in time and freeze it so they can reproduce the information they report. To accommodate the institutional reporting process, PeopleSoft provides you with the Institutional Research data mart and Institutional Research dashboard.

See *PeopleSoft Campus Solutions Warehouse 9.1 PeopleBook*, "Understanding the Campus Solutions Warehouse," Institutional Research Data Mart.

The Institutional Research dashboard is designed to support colleges and universities with IPEDS reporting on your institution's admissions, student enrollment, and degree completion information.

The new dashboards are divided into temporary layer and frozen layer as follows:

- CSW IR Temporary Layer
- CSW IR Frozen Layer

Both dashboards are identical in format and fields displayed, the only difference being whether temporary data or frozen data is displayed. The two dashboards contain the following pages:

- Student Enrollment
- Degree Completions

- Admissions

Note. Because both dashboards are identical in format and fields displayed, this book documents only the CSW IR *Temporary Layer* dashboard as an example.

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

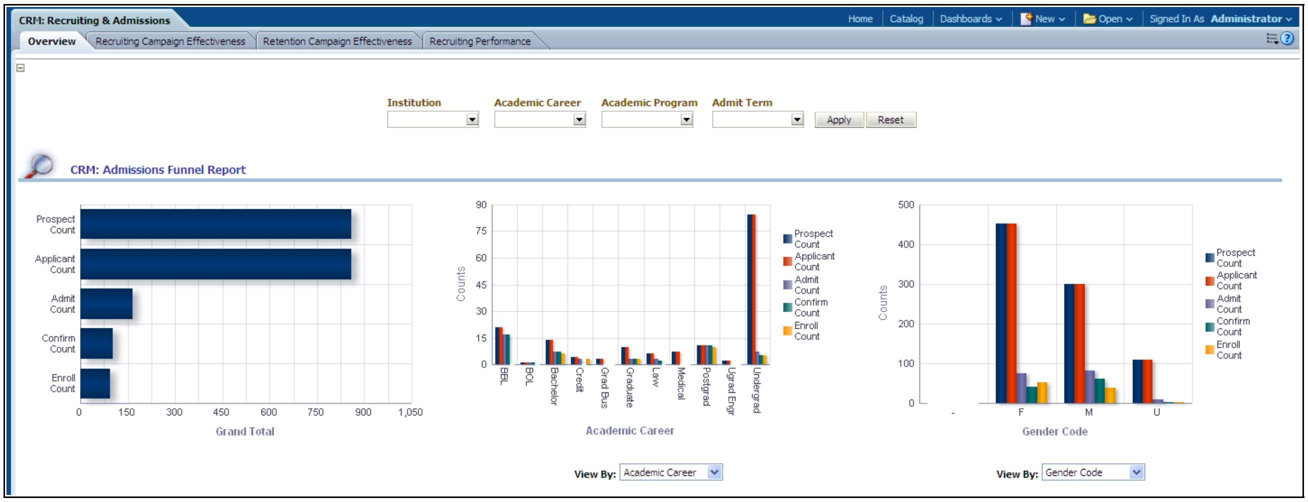
The Fusion Campus Solutions Intelligence application delivers the capability to seamlessly interact with the PeopleSoft Campus Solutions transactional system to drive insight to action. Some reports provide a link for you to drill in place from the dashboard directly to the Maintain Applications component in the PeopleSoft 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 CRM: Recruiting and Admissions Dashboard - Overview Page

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

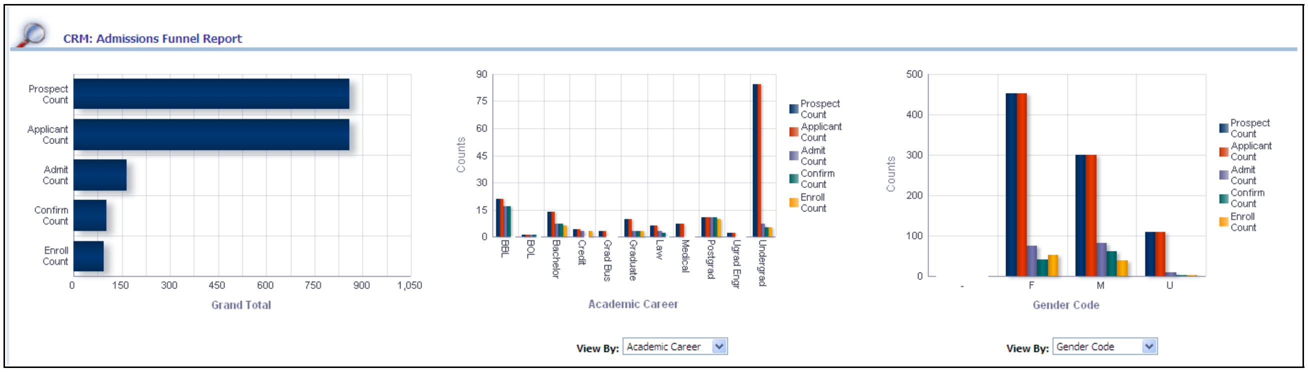


CRM: Recruiting and Admissions dashboard

Usage	***Reports***	***Dashboard Prompt***
Provides you with an overview of the Prospect to applicant to admit and enrollees' numbers, ratios and yields for your institution.	This page includes the CRM: Admissions Funnel Report.	Use the Admissions and Recruiting - Overview page prompt to filter page results by: • Institution • Academic Career • Academic Program • Admit Term

CRM: 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, part 1

				Prospect Count	Lead Count	Opportunity Count	Applicant Count	Admit Count	Confirm Count	Enroll Count	Applicant %	Admit %	Confirm %	Enroll %	Yield %
Institution	Admit Term	Academic Career	Gender Code												
Great Lakes University	2002 Fall	Graduate	F	1	0	0	1	0	0	0	100%	0%	0%	0%	0%
		Undergrad	F	3	0	0	3	0	0	0	100%	0%	0%	0%	0%
PS Community College System	2002 Fall	Credit	U	1	0	0	1	0	0	0	100%	0%	0%	0%	0%
	2005 Spring	Credit	F	2	0	0	2	2	0	2	100%	100%	0%	0%	100%
			U	1	0	0	1	1	0	1	100%	100%	0%	0%	100%
PeopleSoft Australia Uni	Semester 1 - Autumn 2005	Postgrad	F	3	0	0	3	3	3	2	100%	100%	100%	67%	67%
			M	8	0	0	8	8	8	8	100%	100%	100%	100%	100%
		Undergrad	F	10	0	0	10	10	10	9	100%	100%	100%	90%	90%
			M	7	0	0	7	7	7	7	100%	100%	100%	100%	100%
PeopleSoft University	1998 Fall	Graduate	F	5	0	0	5	3	1	1	100%	60%	33%	100%	33%
			M	11	0	0	11	6	3	4	100%	55%	50%	133%	67%
		Medical	F	1	0	0	1	0	0	0	100%	0%	0%	0%	0%
		Undergrad	F	21	0	0	21	15	6	6	100%	71%	40%	100%	40%
			M	28	0	0	28	15	7	5	100%	54%	47%	71%	33%
	1998 Fall Qtr	Law	F	2	0	0	2	0	0	0	100%	0%	0%	0%	0%
			M	2	0	0	2	0	0	0	100%	0%	0%	0%	0%
	1999 Fall	Grad Bus	F	3	0	0	3	0	0	0	100%	0%	0%	0%	0%
			M	4	0	0	4	0	0	0	100%	0%	0%	0%	0%
		Graduate	F	3	0	0	3	0	0	0	100%	0%	0%	0%	0%
			M	4	0	0	4	0	0	0	100%	0%	0%	0%	0%
		Law	M	3	0	0	3	0	0	0	100%	0%	0%	0%	0%
		Medical	F	2	0	0	2	0	0	0	100%	0%	0%	0%	0%
			M	4	0	0	4	0	0	0	100%	0%	0%	0%	0%
		Ugrad Engr	M	1	0	0	1	0	0	0	100%	0%	0%	0%	0%
		Undergrad	F	18	0	0	18	4	4	0	100%	22%	100%	0%	0%

Admissions Funnel report, part 2

This report helps monitor different stages and statuses for constituents. It provides a snapshot for the given term to help users analyze the progression of constituents through the various stages and statuses of recruiting (Suspect > Prospect > Applicant > Admit > Confirmed > Enrolled Student) along with the achieved Conversion Rate between consecutive stages. The presented constituent's data can be sliced based on various dimensions like Admit Type, Referral Source, Gender, and so forth.

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 x-axis can also display Academic Program, Academic Plan, Academic Load, Application Center, Ethnic Group, Last School Attended, Region, Gender Code, Admit Type, or Referral Source, depending on your View By filter selection.	The third Admissions Funnel graph displays *Region* data on the x-axis and *Prospect Count*, *Applicant Count*, *Admit Count*, *Confirm Count*, and *Enrollment Count* data on the y-axis. The x-axis can also display Academic Program, Academic Plan, Academic Load, Application Center, Ethnic Group, Last School Attended, Region, Gender Code, Admit Type, or Referral Source, depending on your View By filter selection.

View by Filter (Left)	***View by Filter (Right)***
Use this filter to view the second Admissions Funnel graph results by: • Academic Career (default) • Academic Program • Academic Plan • Academic Load • Application Center • Ethnic Group • Last School Attended • Region • Gender Code • Admit Type • Referral Source	Use this filter to view the third Admissions Funnel graph results by: • Academic Career • Academic Program • Academic Plan • Academic Load • Application Center • Ethnic Group • Last School Attended • Region (default) • Gender Code • Admit Type • Referral Source

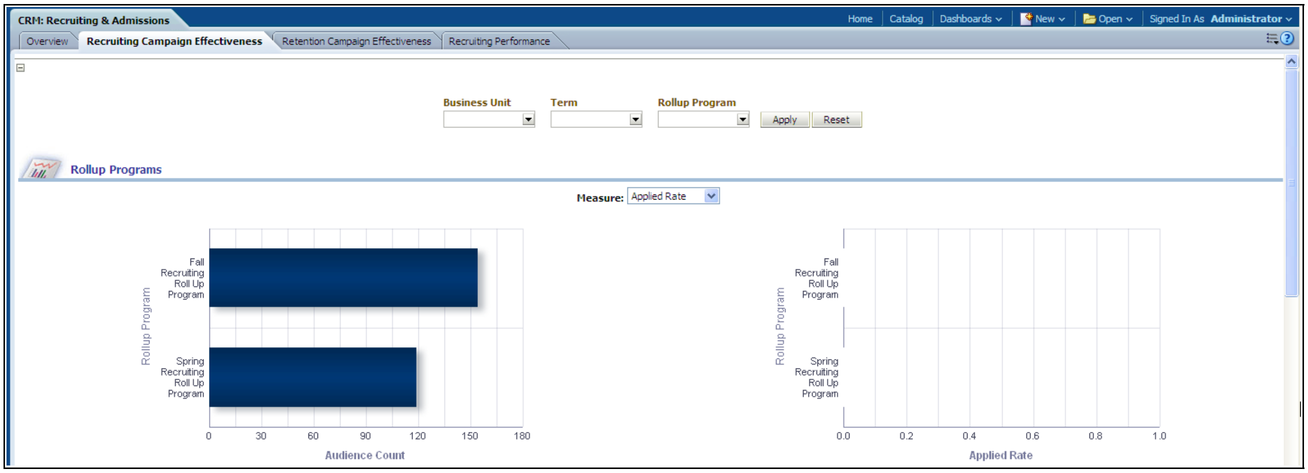
The following table lists the columns and measures used in the Admissions Funnel report.

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Career	Academic Career (D_ACAD_CAR) Dimension
Academic Program	Academic Program (D_ACAD_PROG) Dimension
Academic Plan	Academic Plan (D_ACAD_PLAN) Dimension
Academic Load	Academic Load (D_ACAD_LOAD) Dimension
Application Center	Application Center (D_APPL_CNTR) Dimension
Ethnic Group	Person (D_PERSON) Dimension
Last School Attended	External Organization (D_EXT_ORG) Dimension
Region	Region (D_REGION_CS) Dimension
Gender Code	Person (D_PERSON) Dimension
Admit Type	Admit Type (D_ADMIT_TYPE) Dimension
Referral Source	Referral Source (D_RFRL_SRC) Dimension
Prospect Count	Admission Funnel (F_ADM_FUNNEL) Fact

Report Column / Measure Name	***Report Column / Measure Origin***
Applicant Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact (sourced from CRM system)
Admit Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact (sourced from CS system)
Confirm Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact (sourced from CS system)
Enrollment Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact (sourced from CS system)
Applicant %	(Applicant Count / Prospect Count) * 100
Admit %	(Admit Count / Applicant Count) * 100
Confirm %	(Confirm Count / Admit Count) * 100
Enrollment %	(Enrollment Count / Confirm Count) * 100
Yield %	(Enrollment Count / Admit Count) * 100

Using the CRM: Recruiting and Admissions Dashboard - Recruiting Campaign Effectiveness Page

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

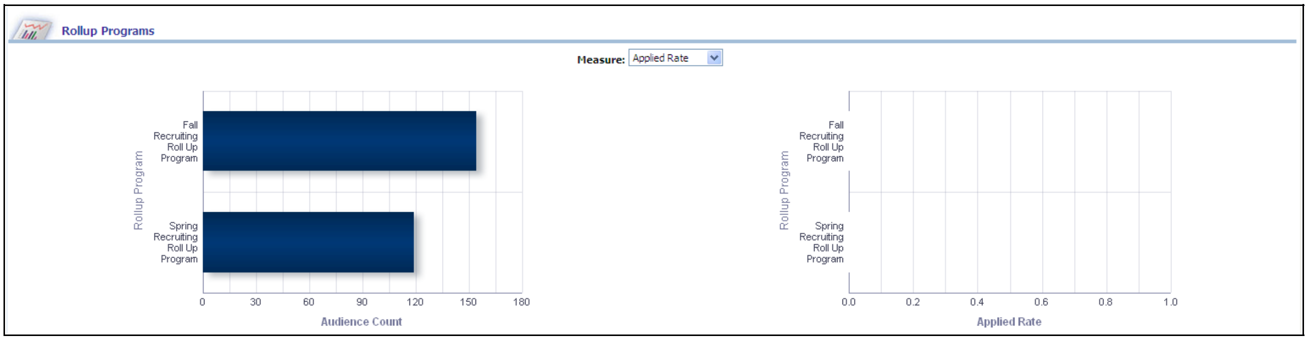


Recruiting Campaign Effectiveness dashboard

Usage	*Reports*	*Dashboard Prompt*
Managers and analysts can use the reports on this page to compare like campaigns (such as comparing the Fall Undergraduate 2009 campaign to the Fall Undergraduate 2008 campaign) to identify which campaigns were more successful in enrolling students, which were more cost effective, and which gave better return on investment.	This page includes the two reports: • Rollup Programs report • Recruiting Programs report	Use the Recruiting and Admissions - Recruiting Campaign Effectiveness page prompt to filter page results by the following parameters. • Business Unit • Term • Rollup Program

Rollup Programs (Recruiting) Report

Access the Rollup Programs report, which enables you to filter on the Business Unit, Term, and Rollup Program meant for recruiting. You can select the rollup programs to be compared.



Rollup Programs (Recruiting) report, part 1

Business Unit	Rollup Program	Term	Audience Count	Applicant Count	Admit Count	Confirm Count	Enroll Count	Applied Rate	Admit Rate	Confirmed Rate	Enrollment Rate	Actual Cost	Cost per Enrolled Student
PSU Medical Center	Fall Recruiting Roll Up Program	2000 Fall	154	115	78	33	21	0%	0%	0%	0%	$163,000	$7,762
	Spring Recruiting Roll Up Program	1998 Fall	62	4	2	1	1	0%	0%	0%	0%	$84,000	$84,000
		1999 Fall	57	36	25	17	13	0%	0%	0%	0%	$120,000	$9,231

Rollup Programs (Recruiting) report, part 2

X,Y Axis Data for Bar Chart 1	***X,Y Axis Data for Bar Chart 2***	***Measure Filter***
The first Rollup Programs graph displays *Audience Count* on the x-axis, and *Rollup Program* on the y-axis.	The second graph displays *Applied Rate* data on the x-axis and *Rollup Program* data on the y-axis The x-axis can also display *Admit Rate*, *Confirmed Rate*, *Enrollment Rate*, or *Actual Cost*, depending on your Measure filter selection.	Use this filter to view report results by the following measures: • Applied Rate (default value) • Admit Rate • Confirmed Rate • Enrollment Rate • Actual Cost

The following table lists the columns and measures used in the Rollup Programs report.

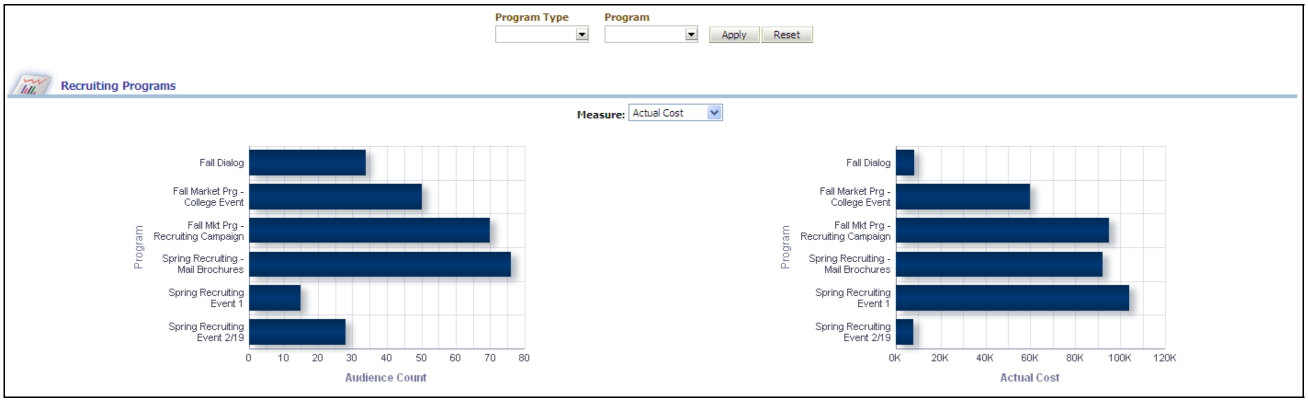
Report Column / Measure Name	***Report Column / Measure Origin***
Audience Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Applicant Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Admit Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Confirm Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Enroll Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Applied Rate	(Students Applied / Audience Count) * 100
Admit Rate	(Students Admitted / Audience Count) * 100
Confirmed Rate	(Students Confirmed / Audience Count) * 100

Report Column / Measure Name	***Report Column / Measure Origin***
Enrollment Rate	(Students Enrolled / Audience Count) * 100
Actual Cost	The fact table has unit cost populated by ETL and is summarized by the report.
Cost per Enrolled Student	Actual Cost / Enroll Count

Recruiting Programs Report

Access the Recruiting Programs report, which enables you to identify which campaigns are more successful in enrolling students, which were more cost effective, and which provide a better return on investment.

Note. You can also drill down from the Rollup Programs report to a specific rollup to compare programs associated with that rollup. When you drill down, the Recruiting Programs report is displayed. You can view the same report in the second section of the Campaign Effectiveness Page, where you can select the program type and the programs to be compared.



Recruiting Programs report, part 1

Business Unit	Rollup Program	Program Type	Program	Term	Audience Count	Applicant Count	Admit Count	Confirm Count	Enroll Count	Applied Rate	Admit Rate	Confirmed Rate	Enrollment Rate	Actual Cost	Cost per Enrolled Student
PSU Medical Center	Fall Recruiting Roll Up Program	Campaign	Fall Mkt Prg - Recruiting Campaign	2000 Fall	70	45	28	15	11	0%	0%	0%	0%	$95,000	$8,636
		Dialog	Fall Dialog	2000 Fall	34	30	20	10	4	0%	0%	0%	0%	$8,000	$2,000
		Event	Fall Market Prg - College Event	2000 Fall	50	40	30	8	6	0%	0%	0%	0%	$60,000	$10,000
	Spring Recruiting Roll Up Program	Campaign	Spring Recruiting - Mail Brochures	1998 Fall	38	0	0	0	0	0%	0%	0%	0%	$27,200	$0
				1999 Fall	38	22	16	12	9	0%	0%	0%	0%	$65,000	$7,222
		Dialog	Spring Recruiting Event 2/19	1998 Fall	14	0	0	0	0	0%	0%	0%	0%	$2,800	$0
				1999 Fall	14	10	7	4	3	0%	0%	0%	0%	$5,000	$1,667
		Event	Spring Recruiting Event 1	1998 Fall	10	4	2	1	1	0%	0%	0%	0%	$54,000	$54,000
				1999 Fall	5	4	2	1	1	0%	0%	0%	0%	$50,000	$50,000

Recruiting Programs report, part 2

X,Y Axis Data for Bar Chart 1	***X,Y Axis Data for Bar Chart 2***
The first Recruiting Programs graph displays *Audience Count* data on the x-axis, and *Program* data on the y-axis.	The second graph displays *Actual Cost* data on the x-axis and *Program* data on the y-axis. The x-axis can also display *Applied Rate*, *Admit Rate*, *Confirmed Rate*, or *Enrollment Rate*, depending on your Measure filter selection.

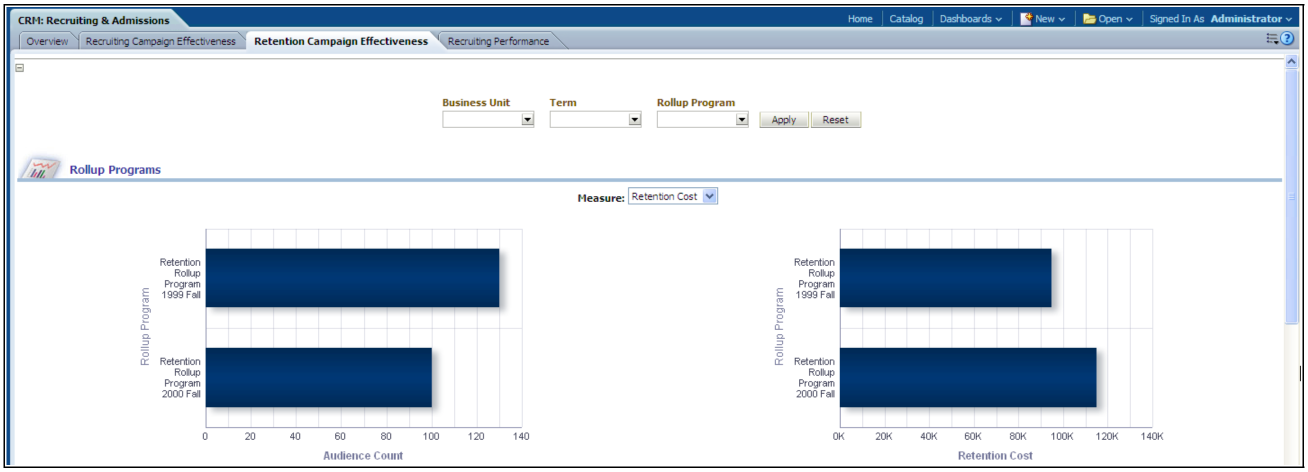
Program Type Filter	***Program Filter***	***Measure Filter***
Use this filter to view report results by the following program types: • (All results) • Campaign • Dialog • Not Available • Roll up	Use this filter to view report results by the specific program. Available choices are filtered by your choice of Program Type.	Use this filter to view report results by the following measures: • Applied Rate • Admit Rate • Confirm Rate • Enrollment Rate • Actual Cost (default)

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

Report Column / Measure Name	***Report Column / Measure Origin***
Audience Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Applicant Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Admit Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Confirm Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Enroll Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Applied Rate	(Students Applied / Audience Count) * 100
Admit Rate	(Students Admitted / Audience Count) * 100
Confirmed Rate	(Students Confirmed / Audience Count) * 100
Enrollment Rate	(Students Enrolled / Audience Count) * 100
Actual Cost	The fact table has unit cost populated by ETL and is summarized by the report.
Cost per Enrolled Student	Actual Cost / Enroll Count

Using the CRM: Recruiting and Admissions Dashboard - Retention Campaign Effectiveness Page

Access the Retention Campaign Effectiveness page (Dashboards, CSW Reports, CRM: Recruiting and Admissions, Retention Campaign Effectiveness).

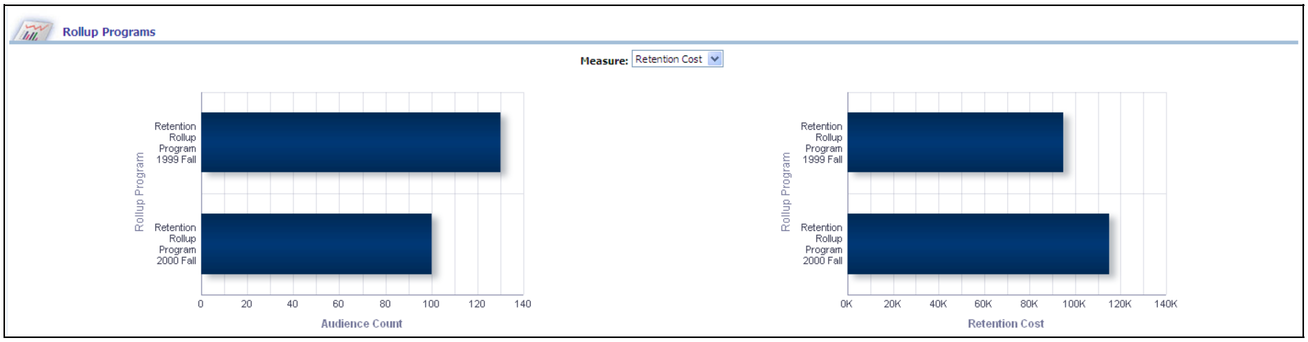


Retention Campaign Effectiveness dashboard

Usage	***Reports***	***Dashboard Prompt***
Enables you to analyze the effectiveness of retention campaigns executed during a given term. You can compare like campaigns to identify which campaigns helped in retaining more at-risk students and which were more cost effective and gave better return on investment.	This page includes the following two reports: • Rollup Programs report • Retention Programs report	Use the Recruiting and Admissions - Retention Campaign Effectiveness page prompt to filter page results by: • Business Unit • Term • Rollup Program

Rollup Programs Report

Access the Rollup Programs report, which helps analyze the effectiveness of retention campaigns executed during a given term.



Rollup Programs report, part 1

			Audience Count	Retention Count	Retention Rate	Retention Cost	Cost per Retained Student
Business Unit	Rollup Program	Term					
PSU Medical Center	Retention Rollup Program 1999 Fall	1999 Fall	130	12	0%	$95000	$7,917
	Retention Rollup Program 2000 Fall	2000 Fall	100	12	0%	$115000	$9,583

Rollup Programs report, part 2

You can compare like campaigns to identify which campaigns helped in retaining more at-risk students and which were more cost effective and gave better return on investment. You can also filter report results on Business Unit, Term, and Rollup Program meant for retention. You can select the rollup programs to be compared.

X,Y Axis Data for Bar Chart 1	***X,Y Axis Data for Bar Chart 2***	***Measure Filter***
The first Recruiting Programs graph displays *Audience Count* data on the x-axis, and *Rollup Program* data on the y-axis.	The second graph displays *Retention Rate* data on the x-axis and *Rollup Program* data on the y-axis. The x-axis can also display *Retention Cost,* depending on your Measure filter selection.	Use this filter to view report results by the following measures: • Retention Rate (default) • Retention Cost

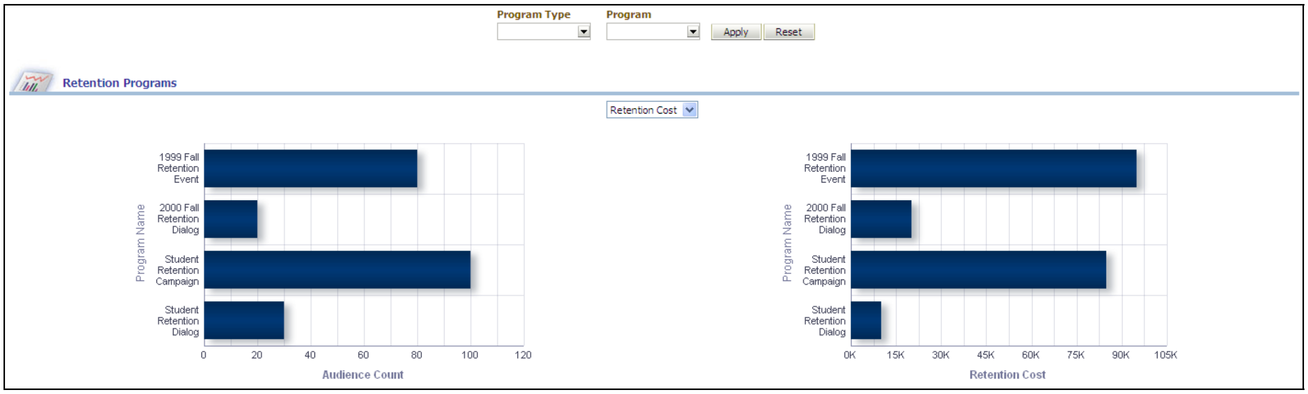
The following table lists the columns and measures used in the Rollup Programs report.

Report Column / Measure Name	***Report Column / Measure Origin***
Audience Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Retention Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Retention Rate	(Retention Count/Audience Count) * 100
Retention Cost	The fact table has unit cost populated by ETL and is summarized by the report.
Cost per Retained Student	Retention Cost / Retention Count

Retention Programs Report

Access the Retention Programs report, which enables you to analyze retention programs.

Note. You can also drill down from the Rollup Programs section to a specific rollup to compare programs associated to that rollup. When you drill down, the Retention Programs page is displayed. You can view the same report in the second section of the Retention Campaign Effectiveness page, where you can select the program type and the programs to be compared.



Retention Programs report, part 1

Business Unit	Rollup Program	Program Type	Program	Term	Audience Count	Applicant Count	Admit Count	Confirm Count	Enroll Count	Applied Rate	Admit Rate	Confirmed Rate	Enrollment Rate	Actual Cost	Cost per Enrolled Student
PSU Medical Center	Fall Recruiting Roll Up Program	Campaign	Fall Mkt Prg - Recruiting Campaign	2000 Fall	70	45	28	15	11	0%	0%	0%	0%	$95,000	$8,636
		Dialog	Fall Dialog	2000 Fall	34	30	20	10	4	0%	0%	0%	0%	$8,000	$2,000
		Event	Fall Market Prg - College Event	2000 Fall	50	40	30	8	6	0%	0%	0%	0%	$60,000	$10,000
	Spring Recruiting Roll Up Program	Campaign	Spring Recruiting - Mail Brochures	1998 Fall	38	0	0	0	0	0%	0%	0%	0%	$27,200	$0
				1999 Fall	38	22	16	12	9	0%	0%	0%	0%	$65,000	$7,222
		Dialog	Spring Recruiting Event 2/19	1998 Fall	14	0	0	0	0	0%	0%	0%	0%	$2,800	$0
				1999 Fall	14	10	7	4	3	0%	0%	0%	0%	$5,000	$1,667
		Event	Spring Recruiting Event 1	1998 Fall	10	4	2	1	1	0%	0%	0%	0%	$54,000	$54,000
				1999 Fall	5	4	2	1	1	0%	0%	0%	0%	$50,000	$50,000

Retention Programs report, part 2

X,Y Axis Data for Bar Chart 1	*X,Y Axis Data for Bar Chart 2*
The first Retention Programs graph displays *Audience Count* on the x-axis, and *Program Name* on the y-axis.	The second graph displays *Retention Cost* data on the x-axis and *Program Name* data on the y-axis. The x-axis can also display *Retention Rate*, depending on your Measure filter selection.

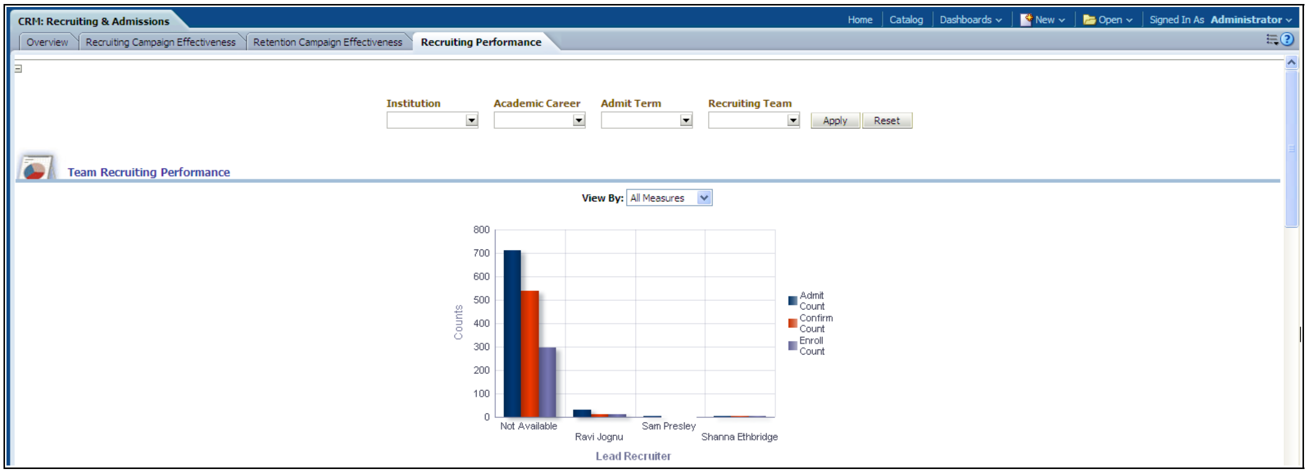
Program Type Filter	***Program Filter***	***Measure Filter***
Use this filter to view report results by the following program types: • All results • Campaign • Dialog • Roll up	Use this filter to view report results by the specific program. Available choices are filtered by your choice of Program Type.	Use this filter to view report results by the following measures: • Retention Rate • Retention Cost (default)

The following table lists the columns and measures used in the Retention Programs report.

Report Column / Measure Name	***Report Column / Measure Origin***
Audience Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Retained Student Count	Marketing Campaign (F_MKT_CMPGN_S) Fact
Retention Rate	(Retention Count/Audience Count) * 100
Retention Cost	The fact table has unit cost populated by ETL and is summarized by the report.
Cost per Retained Student	Retention Cost / Retention Count

Using the CRM: Recruiting and Admissions Dashboard - Recruiting Performance Page

Access the Recruiting Performance page (Dashboards, CSW Reports, CRM: Recruiting and Admissions, Recruiting Performance).

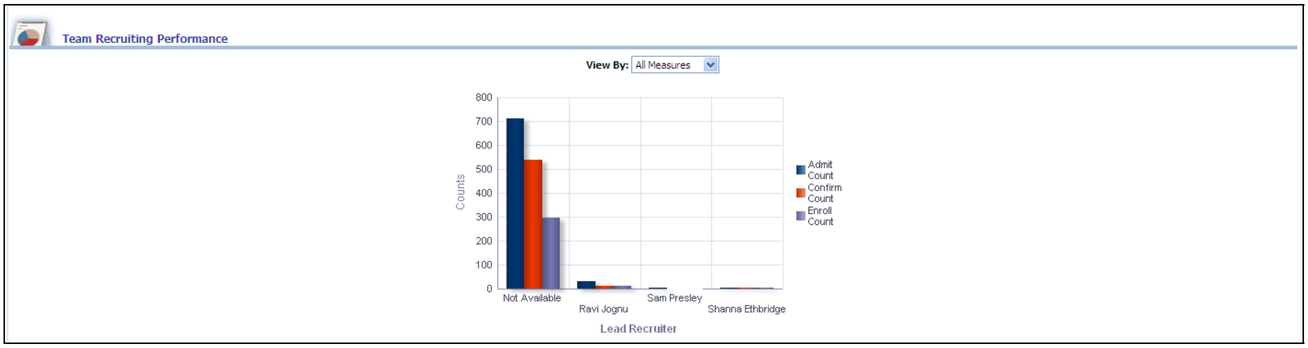


Recruiting Performance dashboard

Usage	***Reports***	***Dashboard Prompt***
Enables you to monitor the overall state of recruitment for a given term for both individual recruiters and recruiting teams.	This page includes the following two reports: • Team Recruiting Performance report • Recruiter's Recruiting Performance report	Use the Recruiting and Admissions - Recruiting Performance page prompt to filter page results by the following parameters: • Institution • Academic Career • AdmitTerm • Recruiting Team

Team Recruiting Performance Report

Access the Team Recruiting Performance report, which helps recruiting managers monitor overall state of recruitment for a given term and compare the recruitment performance of the team members.



Team Recruiting Performance report, part 1

Institution	Admit Term	Academic Career	Recruiting Team	Lead Recruiter	Admit Count	Confirm Count	Enroll Count
Great Lakes University	2002 Fall	Graduate	Appliance Sales - West Region	Not Available	0	0	0
			HE Sales - PS University	Not Available	0	0	0
			Midwest Telco Sales Team	Not Available	0	0	0
			Pacific Team - Multiple BU	Not Available	0	0	0
		Undergraduate	Appliance Sales - West Region	Not Available	0	0	0
			HE Sales - PS University	Not Available	0	0	0
			Midwest Telco Sales Team	Not Available	0	0	0
			Pacific Team - Multiple BU	Not Available	0	0	0
PS Community College System	2002 Fall	Semester Credit	Appliance Sales - West Region	Not Available	0	0	0
			HE Sales - PS University	Not Available	0	0	0
			Midwest Telco Sales Team	Not Available	0	0	0
			Pacific Team - Multiple BU	Not Available	0	0	0
	2005 Spring	Semester Credit	Appliance Sales - West Region	Not Available	5	0	3
			HE Sales - PS University	Not Available	5	0	3
			Midwest Telco Sales Team	Not Available	5	0	3
			Pacific Team - Multiple BU	Not Available	5	0	3
PeopleSoft Australia Uni	Semester 1 - Autumn 2005	Postgraduate	Appliance Sales - West Region	Not Available	11	11	10
			HE Sales - PS University	Not Available	11	11	10
			Midwest Telco Sales Team	Not Available	11	11	10
			Pacific Team - Multiple BU	Not Available	11	11	10
		Undergraduate	Appliance Sales - West Region	Not Available	17	17	16
			HE Sales - PS University	Not Available	17	17	16
			Midwest Telco Sales Team	Not Available	17	17	16
			Pacific Team - Multiple BU	Not Available	17	17	16
PeopleSoft University	1998 Fall	Graduate	HE Sales - PS University	Sam Presley	3	0	0

Rows 1 - 25

Team Recruiting Performance report, part 2

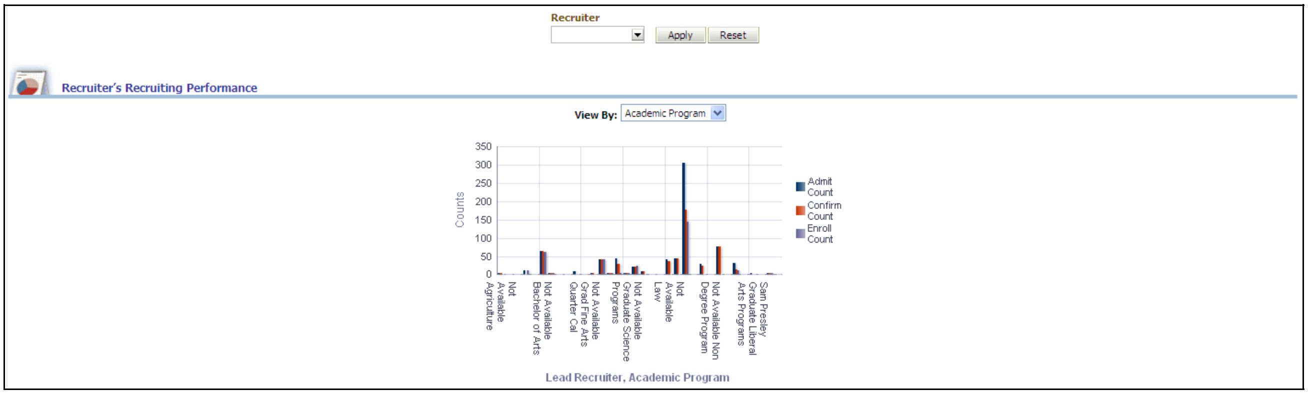
X,Y Axis Data	***View by Filter***
The Team Recruiting Performance report displays *Lead Recruiter* data on the x-axis, and *Admit Count, Confirm Count,* and *Enroll Count* data on the y-axis.	Use this filter to view report results by the following measures: • All Measures (default) • Admit Count • Confirm Count • Enroll Count

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

Report Column / Measure Name	***Report Column / Measure Origin***
Recruiting Team	Sales Team (PS_D_SALES_TEAM) Dimension
Lead Recruiter	Sales Person (PS_D_SALES_REP) Dimension
Academic Career	Academic Career (D_ACAD_CAR) Dimension
Admit Term	Admit Term (D_TERM) Dimension
Institution	Institution (D_INSTITUTION) Dimension
Admit Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact
Confirm Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact
Enroll Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact

Recruiter's Recruiting Performance Report

Access the Recruiter's Recruiting Performance report, which enables you to monitor a recruiter's state of recruitment for a given term. It displays a count of constituents the recruiter is working that have a status equal to Enrolled, Confirmed or Admit.



Recruiter's Recruiting Performance report, part 1

						Admit Count	Confirm Count	Enroll Count
Institution	Admit Term	Academic Career	Recruiting Team	Lead Recruiter	Academic Program			
Great Lakes University	2002 Fall	Graduate	Appliance Sales - West Region	Not Available	Arts & Sciences	0	0	0
			HE Sales - PS University	Not Available	Arts & Sciences	0	0	0
			Midwest Telco Sales Team	Not Available	Arts & Sciences	0	0	0
			Pacific Team - Multiple BU	Not Available	Arts & Sciences	0	0	0
		Undergraduate	Appliance Sales - West Region	Not Available	Arts & Sciences	0	0	0
					Intercommunicative Technology	0	0	0
			HE Sales - PS University	Not Available	Arts & Sciences	0	0	0
					Intercommunicative Technology	0	0	0
			Midwest Telco Sales Team	Not Available	Arts & Sciences	0	0	0
					Intercommunicative Technology	0	0	0
			Pacific Team - Multiple BU	Not Available	Arts & Sciences	0	0	0
					Intercommunicative Technology	0	0	0
PS Community College System	2002 Fall	Semester Credit	Appliance Sales - West Region	Not Available	Certificate Programs	0	0	0
			HE Sales - PS University	Not Available	Certificate Programs	0	0	0
			Midwest Telco Sales Team	Not Available	Certificate Programs	0	0	0
			Pacific Team - Multiple BU	Not Available	Certificate Programs	0	0	0
	2005 Spring	Semester Credit	Appliance Sales - West Region	Not Available	Associate of Arts Programs	3	0	3
					Certificate Programs	2	0	0
			HE Sales - PS University	Not Available	Associate of Arts Programs	3	0	3
					Certificate Programs	2	0	0
			Midwest Telco Sales Team	Not Available	Associate of Arts Programs	3	0	3
					Certificate Programs	2	0	0
			Pacific Team - Multiple BU	Not Available	Associate of Arts Programs	3	0	3
					Certificate Programs	2	0	0
PeopleSoft Australia Uni	Semester 1 - Autumn 2005	Postgraduate	Appliance Sales - West Region	Not Available	Graduate Diploma in Arts	1	1	0

Rows 1 - 25

Recruiter's Recruiting Performance report, part 2

X,Y Axis Data	***Recruiter Filter***	***View by Filter***
The Recruiter's Recruiting Performance report displays *Lead Recruiter* and *Academic Program* data on the x-axis and *Admit Count, Confirm Count,* and *Enroll Count* data on the y-axis. The x-axis can also display any of the following dimensions, depending on your View By filter selection: • Academic Career • Academic Plan • Region • Admit Type • Academic Load • Last School Attended • Referral Source • Application Center • Ethnic Group • Gender Code	User this filter to narrow report results by individual recruiter.	Use this filter to view report results by the following measures: • Academic Career • Academic Program (default) • Academic Plan • Region • Admit Type • Academic Load • Last School Attended • Referral Source • Application Center • Ethnic Group • Gender Code

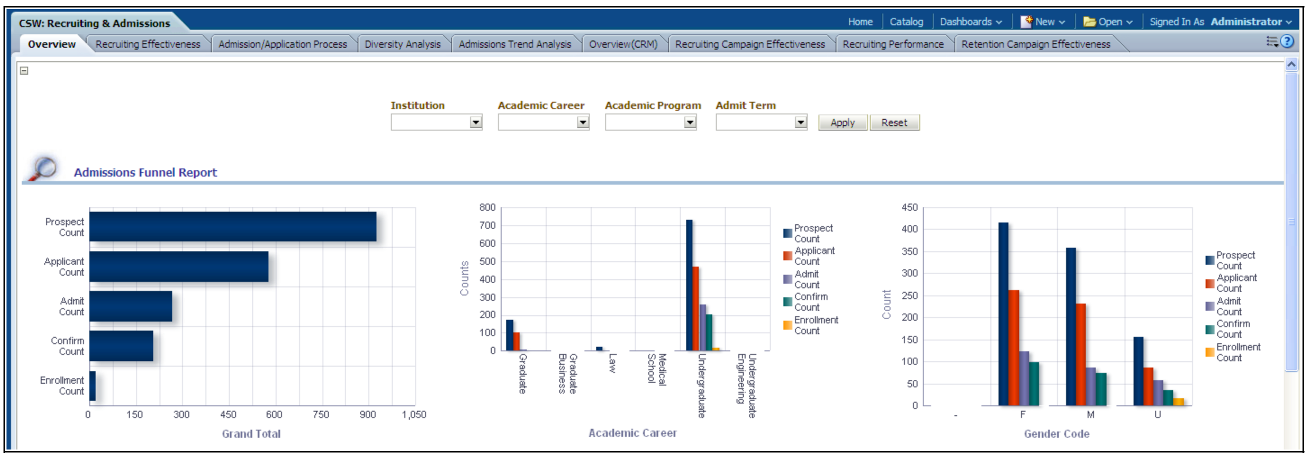
The following table lists the columns and measures used in the Recruiter's Recruiting Performance report.

Report Column / Measure Name	***Report Column / Measure Origin***
Institution	Institution (D_INSTITUTION) Dimension
Admit Term	Admit Term (D_TERM) Dimension
Academic Career	Academic Career (D_ACAD_CAR) Dimension
Academic Program	Academic Program (D_ACAD_PROG) Dimension
Recruiting Team	Sales Team (PS_D_SALES_TEAM) Dimension
Lead Recruiter	Sales Person (PS_D_SALES_REP) Dimension
Region	Region (D_REGION_CS) Dimension
Admit Type	Admit Type (D_ADMIT_TYPE) Dimension
Ethnic Group	Person (D_PERSON) Dimension
Gender Code	Person (D_PERSON) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Admit Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact
Confirm Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact
Enroll Count	CRM Funnel (F_CRM_FUNNEL_S or F_CRM_FUNNEL) Fact

Using the CSW: Recruiting and Admissions Dashboard - Overview Page

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

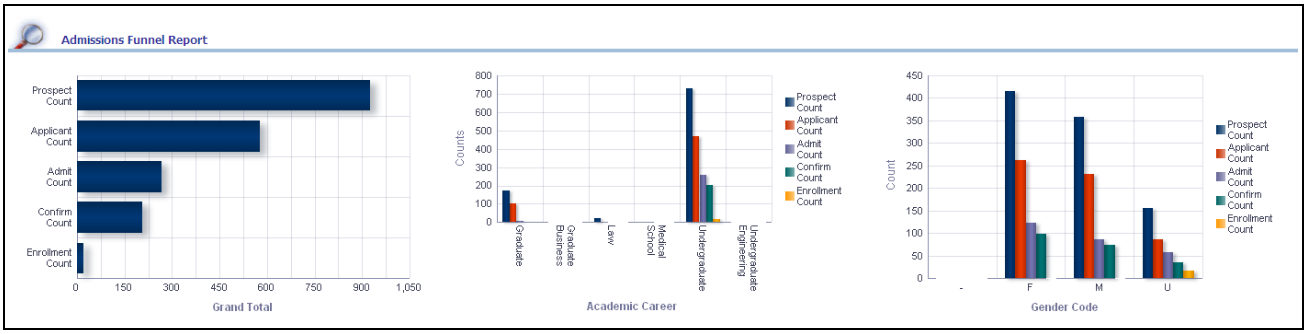


Admissions and Recruiting - Overview page

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: • Academic Career • Academic Program • Institution • Admit Term

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, part 1

View By: Academic Career View By: Gender Code

Institution	Admit Term	Academic Career	Gender Code	Prospect Count	Applicant Count	Admit Count	Confirm Count	Enrollment Count	Applicant %	Admit %	Confirm %	Enrollment %	Yield %
PeopleSoft University	1998 Fall	Graduate	F	4	0	0	0	0	0%	0%	0%	0%	0%
			M	1	0	0	0	0	0%	0%	0%	0%	0%
			U	10	10	7	3	4	100%	70%	42%	133%	57%
		Medical School	M	0	1	0	0	0	0%	0%	0%	0%	0%
		Undergraduate	F	137	56	41	22	0	40%	73%	53%	0%	0%
			M	93	44	26	16	0	47%	59%	61%	0%	0%
			U	71	53	36	19	13	74%	67%	52%	68%	36%
	1998 Fall Qtr	Law	F	2	0	0	0	0	0%	0%	0%	0%	0%
			M	2	0	0	0	0	0%	0%	0%	0%	0%
	1998 Spring	Undergraduate	-	1	0	0	0	0	0%	0%	0%	0%	0%
	1999 Fall	Graduate	F	0	2	0	0	0	0%	0%	0%	0%	0%
		Graduate Business	F	1	1	0	0	0	100%	0%	0%	0%	0%
			M	1	1	0	0	0	100%	0%	0%	0%	0%
		Law	F	3	2	0	0	0	66%	0%	0%	0%	0%
			M	2	1	0	0	0	50%	0%	0%	0%	0%
		Medical School	F	1	1	0	0	0	100%	0%	0%	0%	0%
			M	1	0	0	0	0	0%	0%	0%	0%	0%
		Undergraduate	F	9	7	2	2	0	77%	28%	100%	0%	0%
			M	4	2	1	1	0	50%	50%	100%	0%	0%
			U	2	2	0	0	0	100%	0%	0%	0%	0%
		Undergraduate Engineering	U	1	1	0	0	0	100%	0%	0%	0%	0%
	1999 Fall Qtr	Law	M	1	0	0	0	0	0%	0%	0%	0%	0%
	2000 Fall	Undergraduate	F	20	73	73	73	0	365%	100%	100%	0%	0%
			M	22	55	55	55	0	250%	100%	100%	0%	0%
			U	0	13	13	13	0	0%	100%	100%	0%	0%

Rows 1 - 25

Admissions Funnel report, part 2

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.

View by Filter (Left)	***View by Filter (Right)***
Use this filter to view the second Admissions Funnel graph results by: • *Academic Career* (default) • *Academic Load* • *Academic Plan* • *Academic Program* • *Admit Type* • *Application Center* • *Ethnic Group* • *Gender Code* • *Last School Attended* • *Official Residence* • *Recruiting Center*	Use this filter to view the third Admissions Funnel graph results by: • *Academic Career* (default value for first filter) • *Academic Load* • *Academic Plan* • *Academic Program* • *Admit Type* • *Application Center* • *Ethnic Group* • *Gender Code* (default) • *Last School Attended* • *Official Residence* • *Recruiting Center* • *Region*

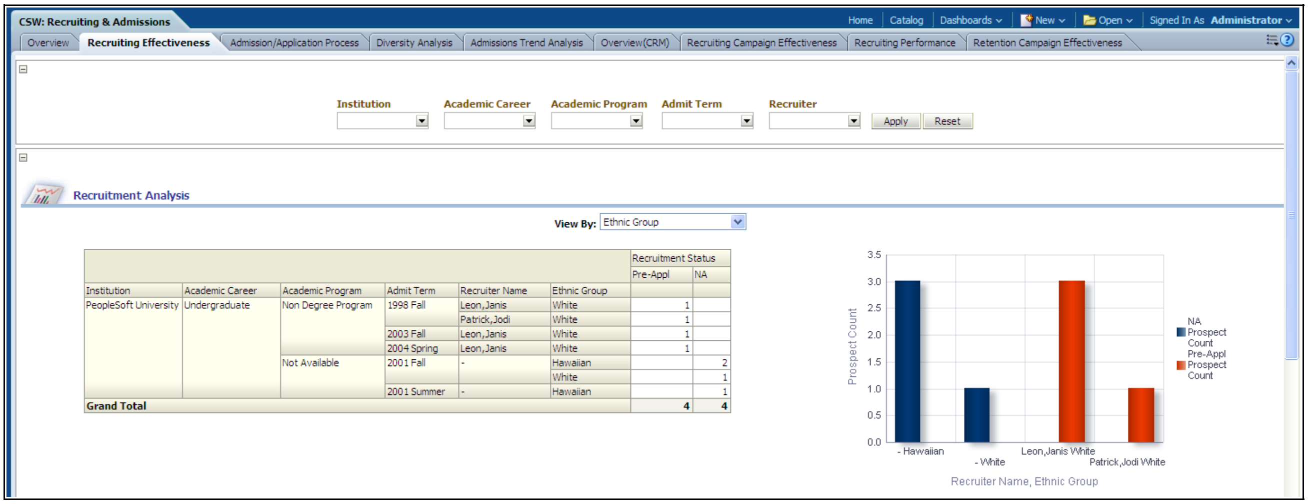
The following table lists the columns and measures used in the Admissions Funnel report.

Report Column / Measure Name	***Report Column / Measure Origin***
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

Report Column / Measure Name	***Report Column / Measure Origin***
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 CSW: Recruiting and Admissions Dashboard - Recruiting Effectiveness Page

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

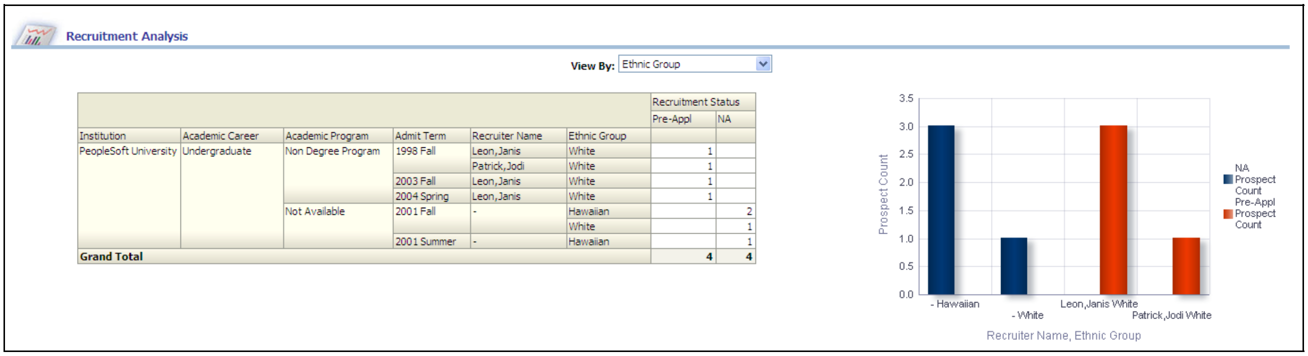


Recruiting Effectiveness page

Usage	*Reports*	*Dashboard Prompt*
Provides you with a birds eye view of your recruiting effectiveness and recruiting trends for your institution.	This page is comprised of the following reports: • Recruitment Analysis report • Recruiting Trends report	Use the Recruiting Effectiveness page prompt to filter page results by: • Institution • Academic Program • Admit Term • Recruiter

Recruitment Analysis Report

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



						Recruitment Status	
						Pre-Appl	NA
Institution	Academic Career	Academic Program	Admit Term	Recruiter Name	Ethnic Group		
PeopleSoft University	Undergraduate	Non Degree Program	1998 Fall	Leon,Janis	White	1	
				Patrick,Jodi	White	1	
			2003 Fall	Leon,Janis	White	1	
			2004 Spring	Leon,Janis	White	1	
		Not Available	2001 Fall	-	Hawaiian		2
					White		1
			2001 Summer	-	Hawaiian		1
Grand Total						**4**	**4**

Recruitment Analysis report

X,Y Axis Data	***View By Filter***
The Recruitment Analysis graph displays *Recruiter Name* data on the x-axis and *Prospect Count* data on the y-axis, with *Ethnic Group* data plotted across the x/y-axis. The x/y-axis can also plot any of the following dimensions, depending on your View By filter selection: • *Admit Type* • *Ethnic Group* (default value) • *Last School Attended* • *Referral Source* • *Recruiting Status* • *State*	Use this filter to view the Recruitment Analysis report results by: • *Admit Type* • *Ethnic Group* (default value) • *Last School Attended* • *Referral Source* • *Recruiting Status* • *State*

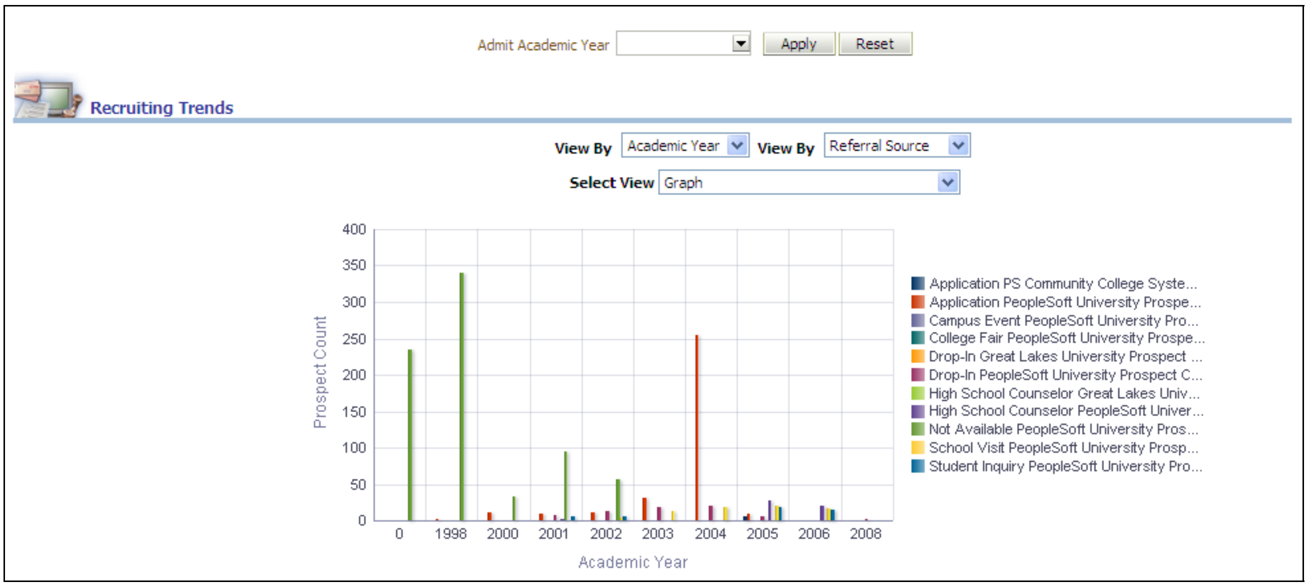
The following table lists the columns and measures used in the Recruitment Analysis report.

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
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
Prospect State	Person Address (D_PERSON_ADDR) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Recruiter Name	Prospect Recruiter (D_PRSPCT_RECRTR) 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

X,Y Axis Data	***Admit Academic Year Filter***
The Recruiting Trends graph displays *Academic Year* data on the x-axis and *Prospect Count* by *Referral Source* data on the y-axis. The x-axis can also display *Admit Term* data, depending on your selection in the first View by filter. 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: • *Recruiting Center* • *Recruiting Status* • *Referral Source* (default) **Note.** You can click on graph data to review drill down data for a particular admit term or academic year.	Use this filter to refine the report results to a specific year.

View By Filters	***Select View Filter***
Use this filter to view the report results by: • *Academic Year* (default value, available in the first filter only) • *Admit Term* (available in the first filter only) • *Recruiting Center* (available in the second filter only) • *Recruiting Status* (available in the second filter only) • *Referral Source* (default value, available in the second filter only)	Use this filter to: • present the data as a function of prospect count, year over year • present the data as a function of prospect count, percent of year total

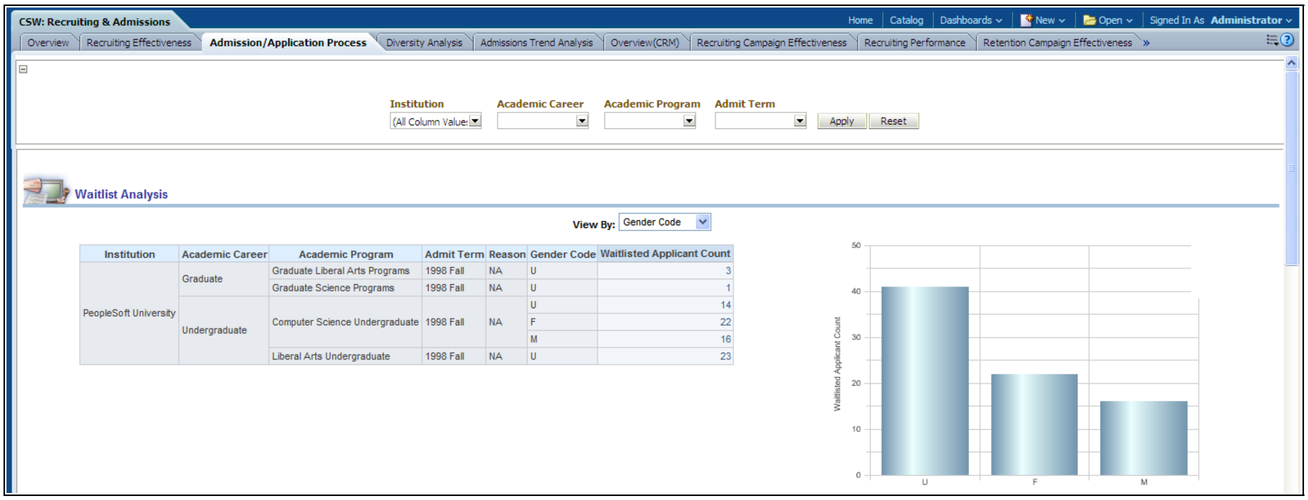
The following table lists the columns and measures used in the Recruiting Trends report.

Report Column Name	***Report Column Origin***
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 CSW: Recruiting and Admissions Dashboard - Admission/Application Process Page

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

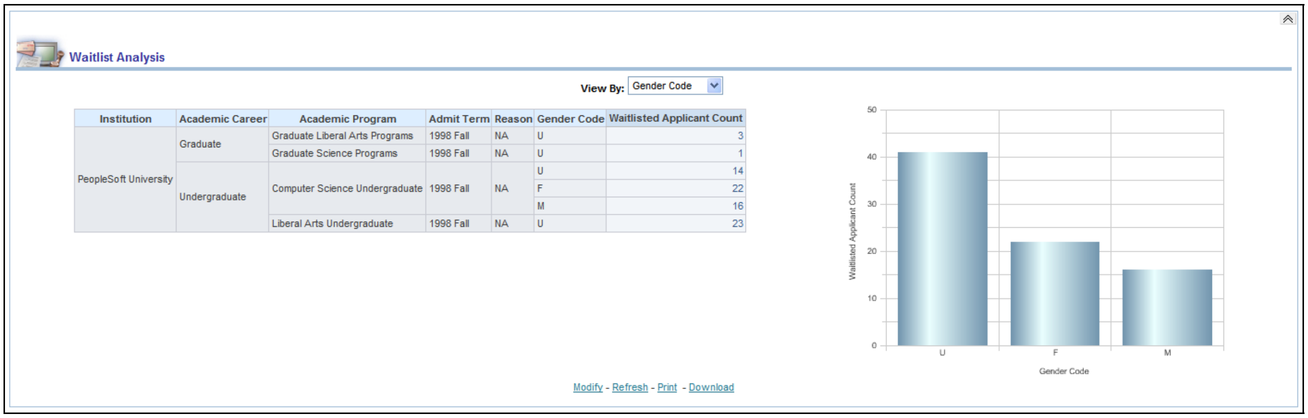


Admission/Application Process page

Usage	***Reports***	***Dashboard Prompt***
Provides you with an overview of the effectiveness of your admissions and application process for your institution.	This page is comprised of the following reports: • Waitlist Analysis report • Checklist Analysis report • Student Response Analysis report • Student Response Analysis Reason report	Use the Admission/Application Process page prompt to filter page results by: • Institution • Academic Career • Academic Program • Admit Term

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

X,Y Axis Data	*View By Filter*
The Waitlist Analysis graph displays *Gender Code* data on the x-axis and *Waitlisted Applicant Count* data on the y-axis. The x-axis can also display any of the following dimensions, depending on your View By filter selection: • *Admit Type* • *Ethnic Category* • *Ethnic Group* • *Gender Code* (default) **Note.** You can click on graph data to review drill down data for a particular gender code, ethnic group, and so forth.	Use this filter to view the report results by: • *Admit Type* • *Ethnic Category* • *Ethnic Group* • *Gender Code* (default)

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

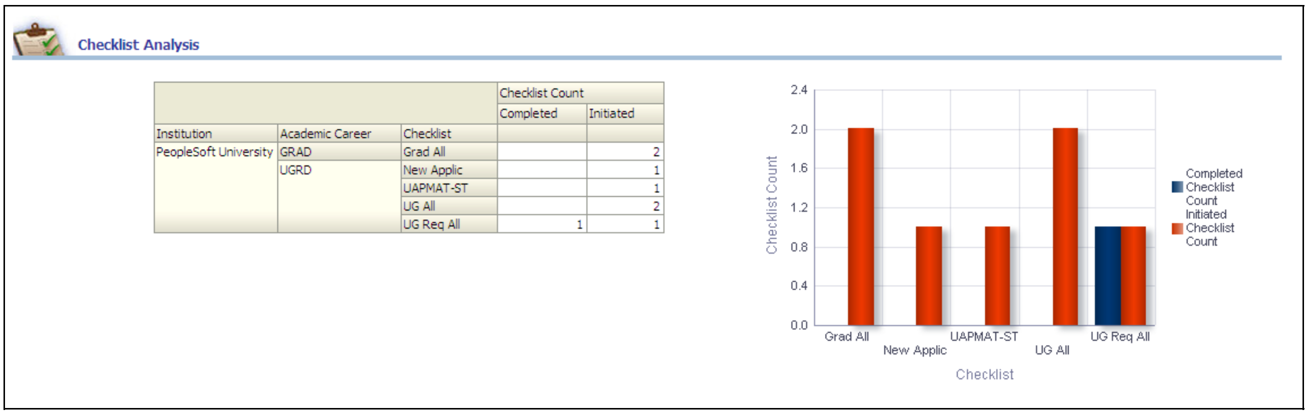
Report Column / Measure Name	*Report Column / Measure Origin*
Academic Career	Academic Career (D_ACAD_CAR) Dimension
Academic Program	Academic Program (D_ACAD_PROG) Dimension
Admit Term	Admit Term (D_TERM) Dimension
Admit Type	Admit Type (D_ADMIT_TYPE) Dimension
Ethnic Category	Person (D_PERSON) Dimension
Ethnic Group	Person (D_PERSON) Dimension
Gender Code	Person (D_PERSON) Dimension

Report Column / Measure Name	Report Column / Measure Origin
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.

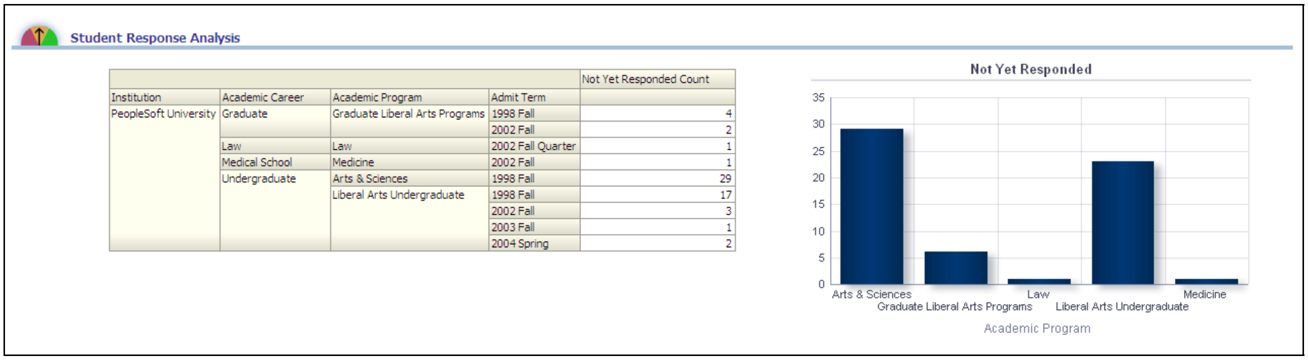
The following table lists the columns and measures used in the Checklist Analysis report.

Report Column / Measure Name	Report Column / Measure Origin
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

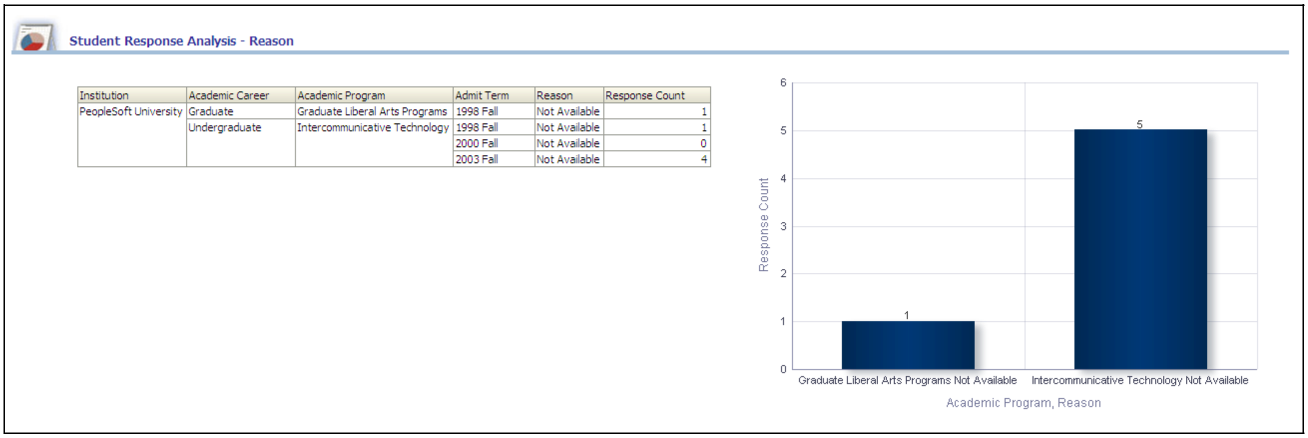
The Student Response Analysis graph displays *Academic Program* data on the x-axis and *Admit Count* data on the y-axis.

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

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
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

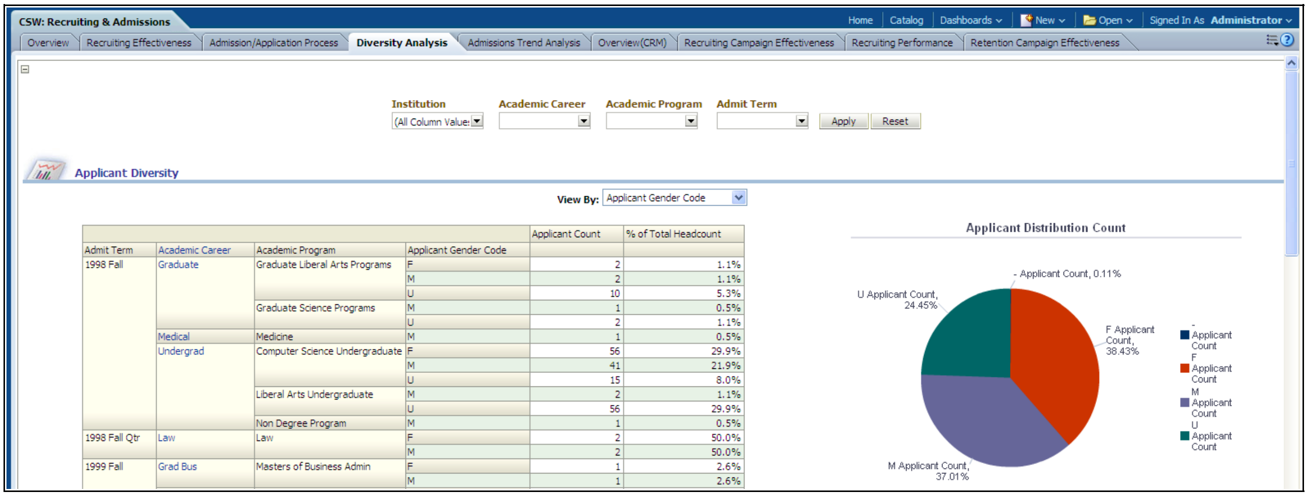
The Student Response Analysis Reason graph displays *Academic Program* by *Reason* data on the x-axis and *Response Count* data on the y-axis.

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 CSW: Recruiting and Admissions Dashboard - Diversity Analysis Page

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

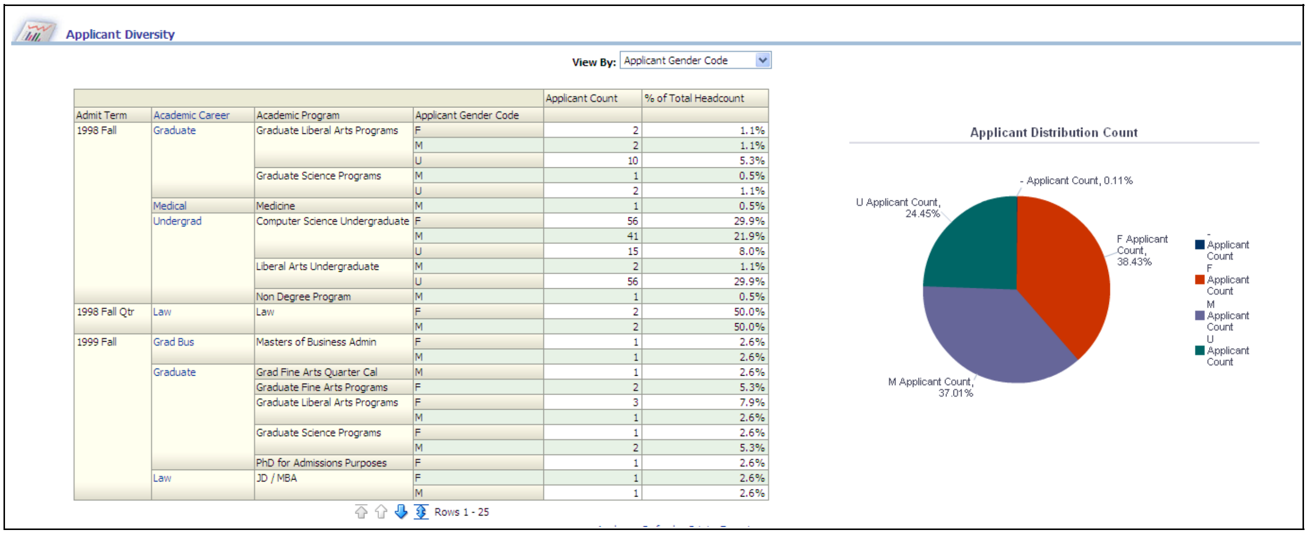


Diversity Analysis page

Usage	*Reports*	*Dashboard Prompt*
Provides you with a birds eye view of the diversity of the student population admitted into your institution.	This page is comprised of the following reports: • Applicant Diversity report • Undergraduate Admissions report	Use the Diversity Analysis page prompt to filter page results by: • Institution • Academic Career • Academic Program • Admit Term

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

View By: Applicant Gender Code

Admit Term	Academic Career	Academic Program	Applicant Gender Code	Applicant Count	% of Total Headcount
1998 Fall	Graduate	Graduate Liberal Arts Programs	F	2	1.1%
			M	2	1.1%
			U	10	5.3%
		Graduate Science Programs	M	1	0.5%
			U	2	1.1%
	Medical	Medicine	M	1	0.5%
	Undergrad	Computer Science Undergraduate	F	56	29.9%
			M	41	21.9%
			U	15	8.0%
		Liberal Arts Undergraduate	M	2	1.1%
			U	56	29.9%
		Non Degree Program	M	1	0.5%
1998 Fall Qtr	Law	Law	F	2	50.0%
			M	2	50.0%
1999 Fall	Grad Bus	Masters of Business Admin	F	1	2.6%
			M	1	2.6%
	Graduate	Grad Fine Arts Quarter Cal	M	1	2.6%
		Graduate Fine Arts Programs	F	2	5.3%
		Graduate Liberal Arts Programs	F	3	7.9%
			M	1	2.6%
		Graduate Science Programs	F	1	2.6%
			M	2	5.3%
		PhD for Admissions Purposes	F	1	2.6%
	Law	JD / MBA	F	1	2.6%
			M	1	2.6%

Rows 1 - 25

Applicant Diversity report

Pie Chart Data	*View By Filter*
The Applicant Diversity pie chart displays *Applicant Count* data grouped by *Applicant Gender Code.* Applicant count data can also be grouped by any of the following dimensions, depending on your View By filter selection: • *Applicant Ethnic Category* • *Applicant Ethnic Group* • *Applicant Gender Code* (default)	Use this filter to filter report results by: • *Applicant Ethnic Category* • *Applicant Ethnic Group* • *Applicant Gender Code* (default)

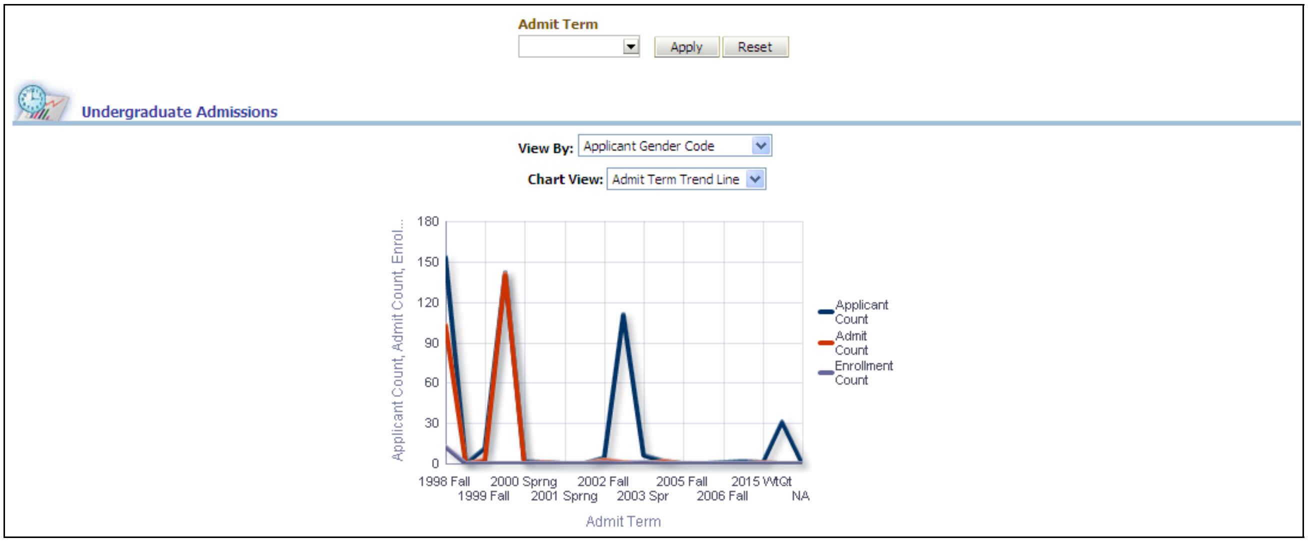
The following table lists the columns and measures used in the Applicant Diversity report.

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

Column / Measure Name	***Column / Measure Origin***
% 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, part 1

		1998 Fall	1998 Sprng	1999 Fall	2000 Fall	2000 Sprng	2001 Fall	2001 Sprng	2001 Sum	2002 Fall	2003 Fall	2003 Spr	2004 Spr	2005 Fall	2005 Spr	2006 Fall	2014 SmQt	2015 WtQt	Cur Sevis	NA
Applicant Gender Code																				
-	Applicant Count		0																	
	Admit Count		0																	
	Enrollment Count		0																	
F	Applicant Count	56		7	73	0	0			2	49	2			0	0	2	1	16	0
	Admit Count	41		2	73	0	0			2	1	0			0	0	0	1	0	0
	Enrollment Count	0		0	0	0	0			0	0	1			0	0	0	0	0	0
M	Applicant Count	44		2	55	2	1	0	0	2	62	4	1	0	0	1			15	0
	Admit Count	26		1	55	0	1	0	0	1	0	0	1	0	0	0			0	0
	Enrollment Count	0		0	0	0	0	0	0	1	0	0	0	0	0	0			0	0
U	Applicant Count	53		3	14		0			1	0		1							0
	Admit Count	36		0	13		0			0	0		1							0
	Enrollment Count	13		0	0		0			0	0		0							0
Applicant Count		**153**	**0**	**12**	**142**	**2**	**1**	**0**	**0**	**5**	**111**	**6**	**2**	**0**	**0**	**1**	**2**	**1**	**31**	**0**
Admit Count		**103**	**0**	**3**	**141**	**0**	**1**	**0**	**0**	**3**	**1**	**0**	**2**	**0**	**0**	**0**	**0**	**1**	**0**	**0**
Enrollment Count		**13**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**1**	**0**	**1**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

Undergraduate Admissions report, part 2

X,Y Axis Data	***Admit Term Filter***
The Undergraduate Admissions chart displays *Admit Term* data on the x-axis and *Applicant Count*,*Admit Count*, and *Enrollment Count* data on the y-axis.	Use this filter to refine the report results to a specific admit semester and year.

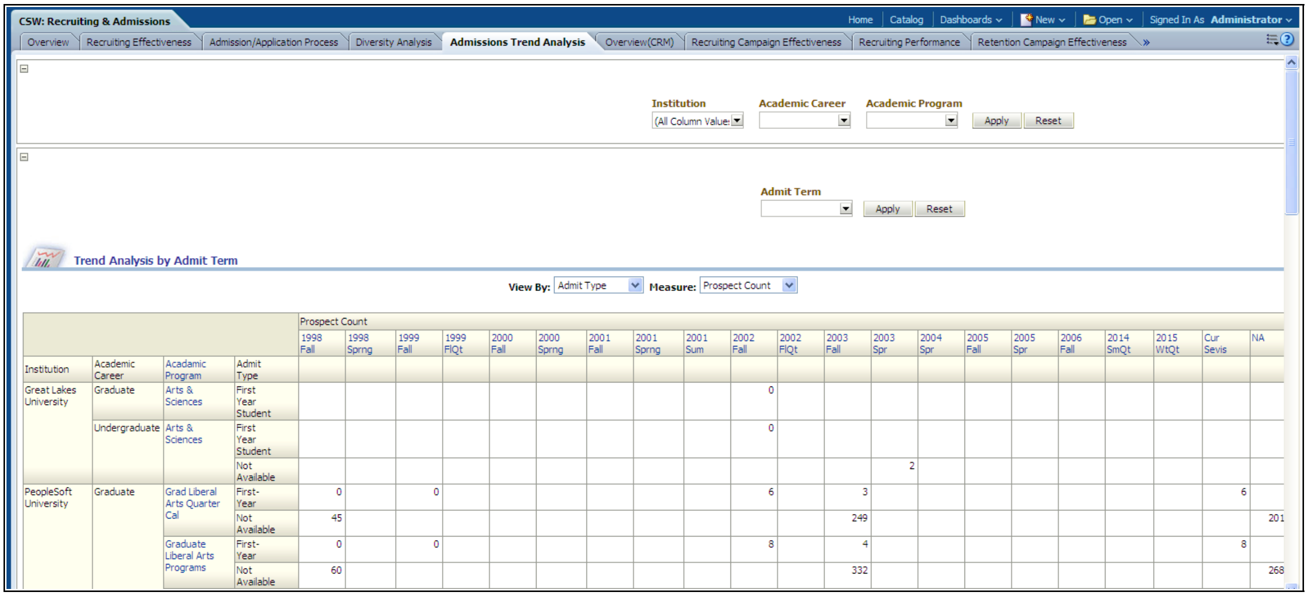
View By Filter	***Chart View Filter***
Use this filter to view the table report results by: • *Applicant Ethnic Group Code* • *Applicant Gender Code* (default)	Use this filter to: • view the data in trend line format by admit term • view the data in bar chart format by diversity

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

Report Column / Measure Name	***Report Column / Measure Origin***
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
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

Using the CSW: Recruiting and Admissions Dashboard - Admissions Trend Analysis Page

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

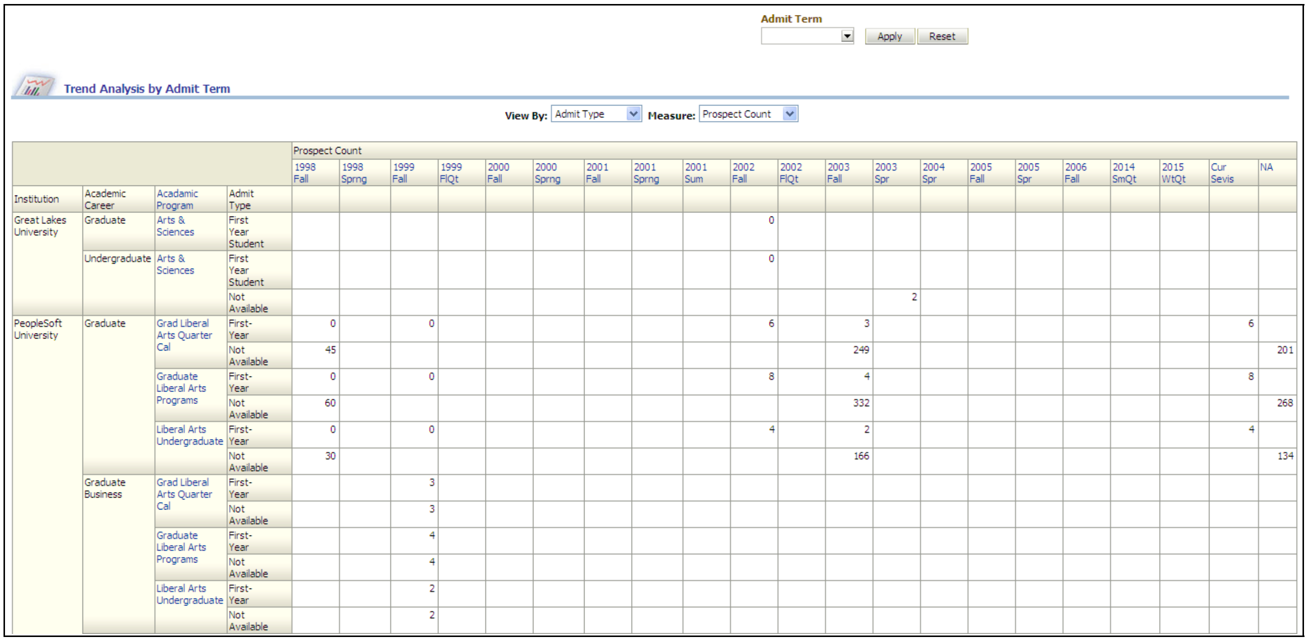


Admissions Trend Analysis page

Usage	*Reports*	*Dashboard Prompt*
Provides you with a birds eye view of student applicants and related information, such as academic career and residency.	This page is comprised of the following reports: • Trend Analysis By Admit Term report • Trend Analysis By Academic Year report • Applicant Trends - Admission and Recruitment report	Use the Admissions Trend Analysis page prompt to filter page results by: • Institution • Academic Career • Academic Program

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.



Admit Term

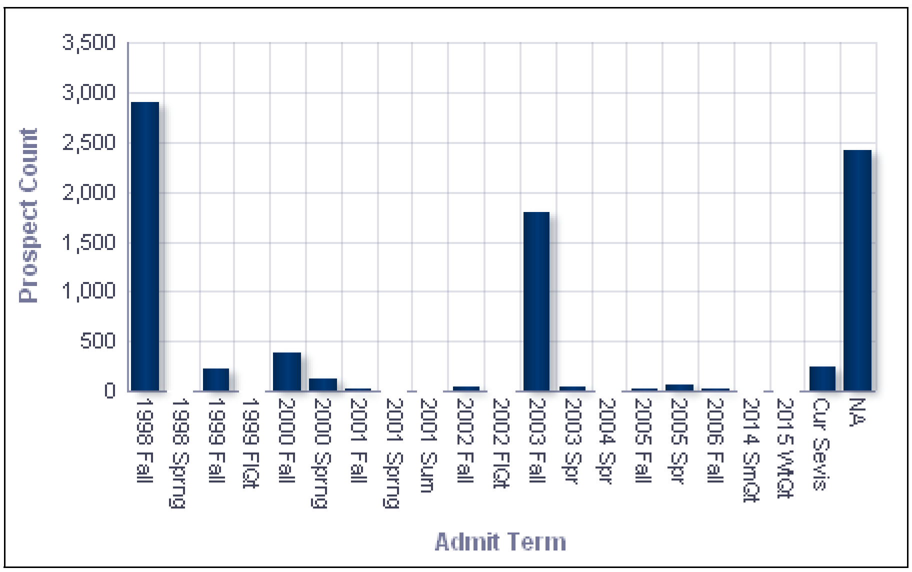
Apply Reset

Trend Analysis by Admit Term

View By: Admit Type Measure: Prospect Count

				Prospect Count																				
				1998 Fall	1998 Sprng	1999 Fall	1999 FlQt	2000 Fall	2000 Sprng	2001 Fall	2001 Sprng	2001 Sum	2002 Fall	2002 FlQt	2003 Fall	2003 Spr	2004 Spr	2005 Fall	2005 Spr	2006 Fall	2014 SmQt	2015 WtQt	Cur Sevis	NA
Institution	Academic Career	Acadamic Program	Admit Type																					
Great Lakes University	Graduate	Arts & Sciences	First Year Student										0											
	Undergraduate	Arts & Sciences	First Year Student										0											
			Not Available													2								
PeopleSoft University	Graduate	Grad Liberal Arts Quarter Cal	First-Year	0		0							6		3								6	
			Not Available	45											249									201
		Graduate Liberal Arts Programs	First-Year	0		0							8		4								8	
			Not Available	60											332									268
		Liberal Arts Undergraduate	First-Year	0		0							4		2								4	
			Not Available	30											166									134
	Graduate Business	Grad Liberal Arts Quarter Cal	First-Year			3																		
			Not Available			3																		
		Graduate Liberal Arts Programs	First-Year			4																		
			Not Available			4																		
		Liberal Arts Undergraduate	First-Year			2																		
			Not Available			2																		

Trend Analysis By Admit Term report, part 1



Trend Analysis By Admit Term report, part 2

X,Y Axis Data	***Admit Term Filter***
The Trend Analysis By Admit Term bar chart displays *Admit Term* data on the x-axis and *Prospect Count* data on the y-axis. The y-axis can also display any of the following measures, depending on your Measure filter selection: • *Admit Count* • *Applicant Count* • *Confirm Count* • *Enrollment Count* • *Prospect Count* (default value)	Use this filter to refine the report results to a specific admit term (year and semester).

View By Filter	***Measure Filter***
Use this filter to view the table report results by: • *Academic Level* • *Admit Type* (default value)	Use this filter to view report results by the following measures: • *Admit Count* • *Applicant Count* • *Confirm Count* • *Enrollment Count* • *Prospect Count* (default value)

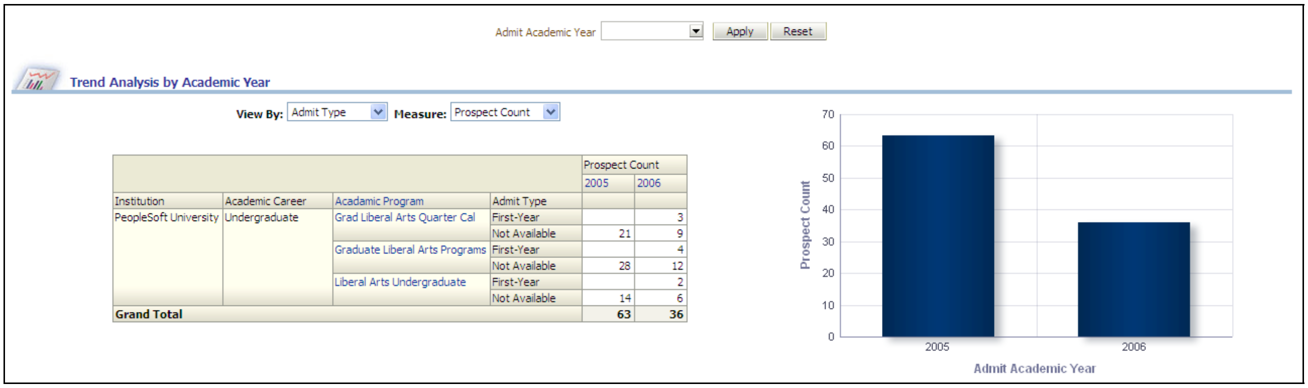
The following table lists the columns and measures used in the Trend Analysis By Admit Term report.

Report Column / Measure Name	***Report Column / Measure Origin***
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

Report Column / Measure Name	*Report Column / Measure Origin*
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.



				Prospect Count	
				2005	2006
Institution	Academic Career	Acadamic Program	Admit Type		
PeopleSoft University	Undergraduate	Grad Liberal Arts Quarter Cal	First-Year		3
			Not Available	21	9
		Graduate Liberal Arts Programs	First-Year		4
			Not Available	28	12
		Liberal Arts Undergraduate	First-Year		2
			Not Available	14	6
Grand Total				**63**	**36**

Trend Analysis By Academic Year report

X,Y Axis Data	*Admit Academic Year Filter*
The Trend Analysis By Academic Year graph displays *Admit Academic Year* data on the x-axis and *Prospect Count* data on the y-axis. The y-axis can also display any of the following measures, depending on your Measure filter selection: • *Admit Count* • *Applicant Count* • *Confirm Count* • *Enrollment Count* • *Prospect Count* (default value)	Use this filter to refine the report results to a specific year.

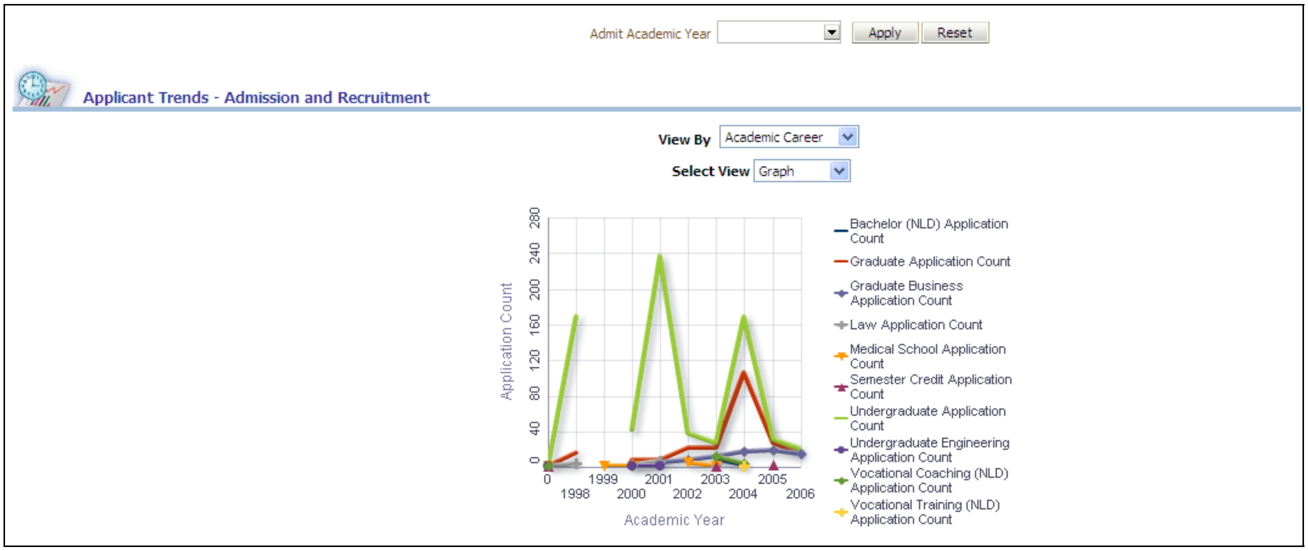
View By Filter	***Measure Filter***
Use this filter to view table report results by: • *Academic Level* • *Admit Type* (default value)	Use this filter to view report results by the following measures: • *Admit Count* • *Applicant Count* • *Confirm Count* • *Enrollment Count* • *Prospect Count* (default value)

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
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	***Admit Academic Year Filter***
The Applicant Trends - Admission and Recruitment graph displays *Academic Year* data on the x-axis and *Application Count* by *Academic Career* data on the y-axis. 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: • *Academic Career* (default value) • *Academic Level* • *Academic Program* • *Admit Type* • *Campus* • *Institution* • *Residency* **Note.** You can click on graph data to review drill down data.	Use this filter to refine the report results to a specific year.

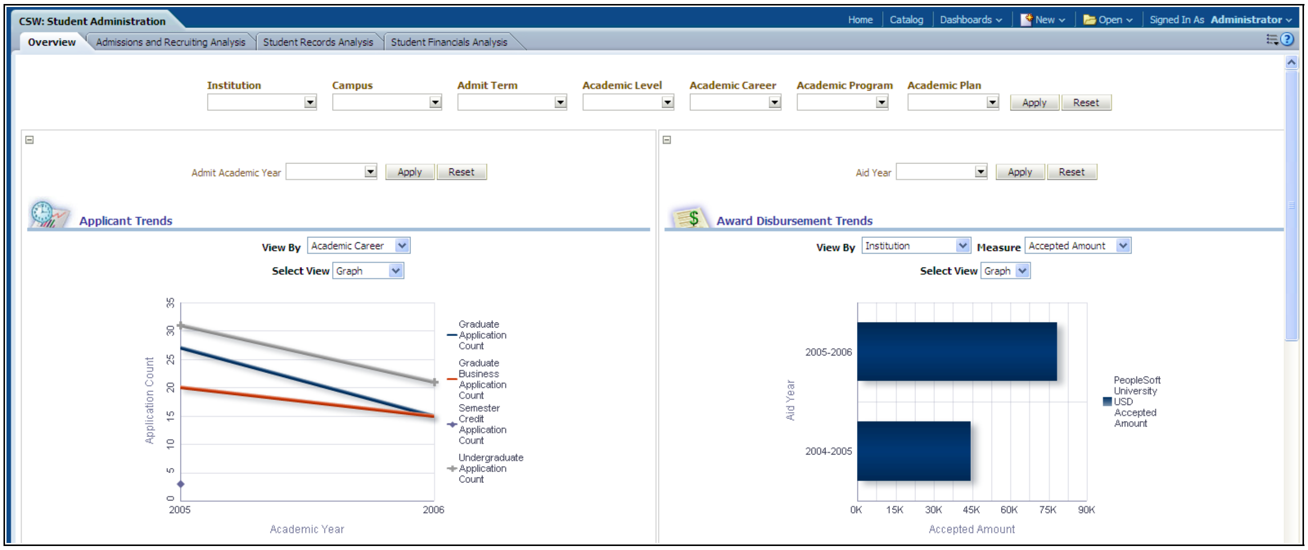
View By Filter	***Select View Filter***
Use this filter to view report results by: • *Academic Career* (default value) • *Academic Level* • *Academic Program* • *Admit Type* • *Campus* • *Institution* • *Residency*	Use this filter to: • view the data in line graph (chart) format • view the data in pivot table format

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

Report Column / Measure Name	***Report Column / Measure Origin***
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	(Applicant Count / Total Number of Applicants) * 100 **Note.** Applicant Count and Total Number of Applicants are constrained by a specific academic year.

Using the CSW: Student Administration - Overview Page

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

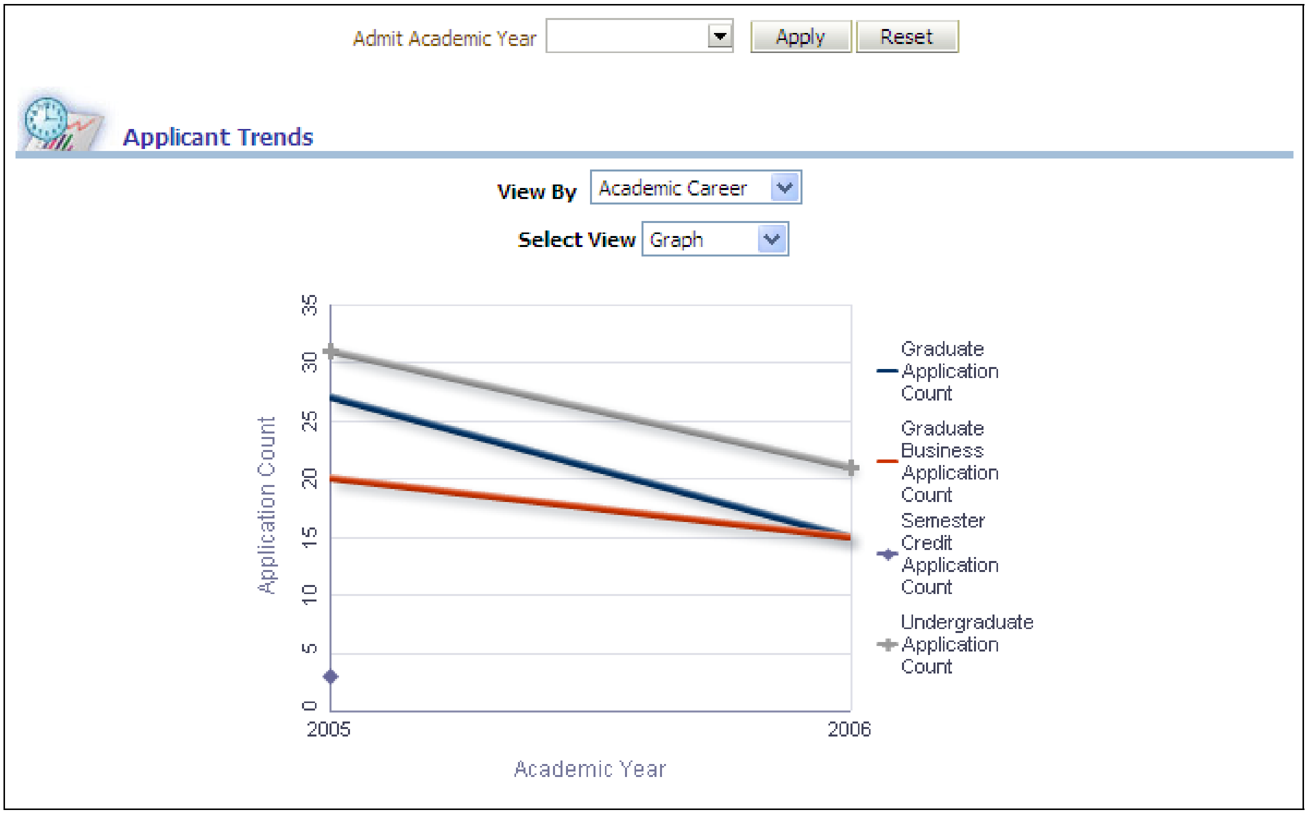


Student Administration - Overview page

Usage	*Reports*	*Dashboard Prompt*
The Student Administration page provides an overview of applicant, award disbursement, student retention, and student graduation trends for your institution.	This page is comprised of the following reports: • Applicant Trends report • Award Disbursement Trends report • Student Retention Trends report • Student Graduation Trends report	Use the Overview page prompt to filter page results by: • Institution • Campus • Admit Term • Academic Level • Academic Career • Academic Program • Academic Plan

Applicant Trends Report

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



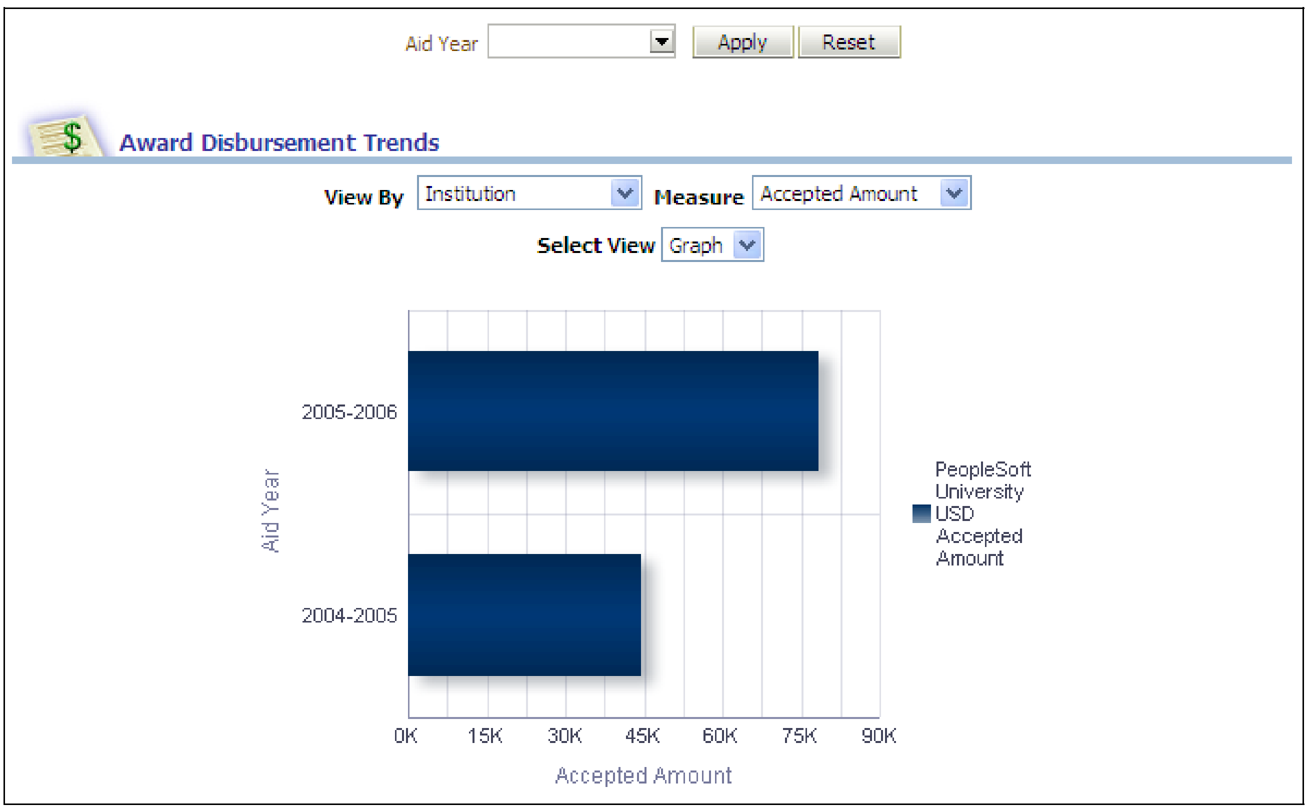
Applicant Trends report

X,Y Axis Data	*Admit Academic Year Filter*
The Applicant Trends graph displays *Academic Year* data on the x-axis and *Application Count* by *Academic Career* data on the y-axis. 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: • *Academic Career* (default value) • *Academic Level* • *Academic Program* • *Admit Type* • *Campus* • *Institution* • *Residency* **Note.** You can click on graph data to review drill down data.	Use this filter to refine the report results to a specific academic year.

View By Filter	***Select View Filter***
Use this filter to view report results by: • *Academic Career* (default value) • *Academic Level* • *Academic Program* • *Admit Type* • *Campus* • *Institution* • *Residency*	Use this filter to: • view the data in line graph (chart) format • view the data in pivot table format

Award Disbursement Trends Report

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



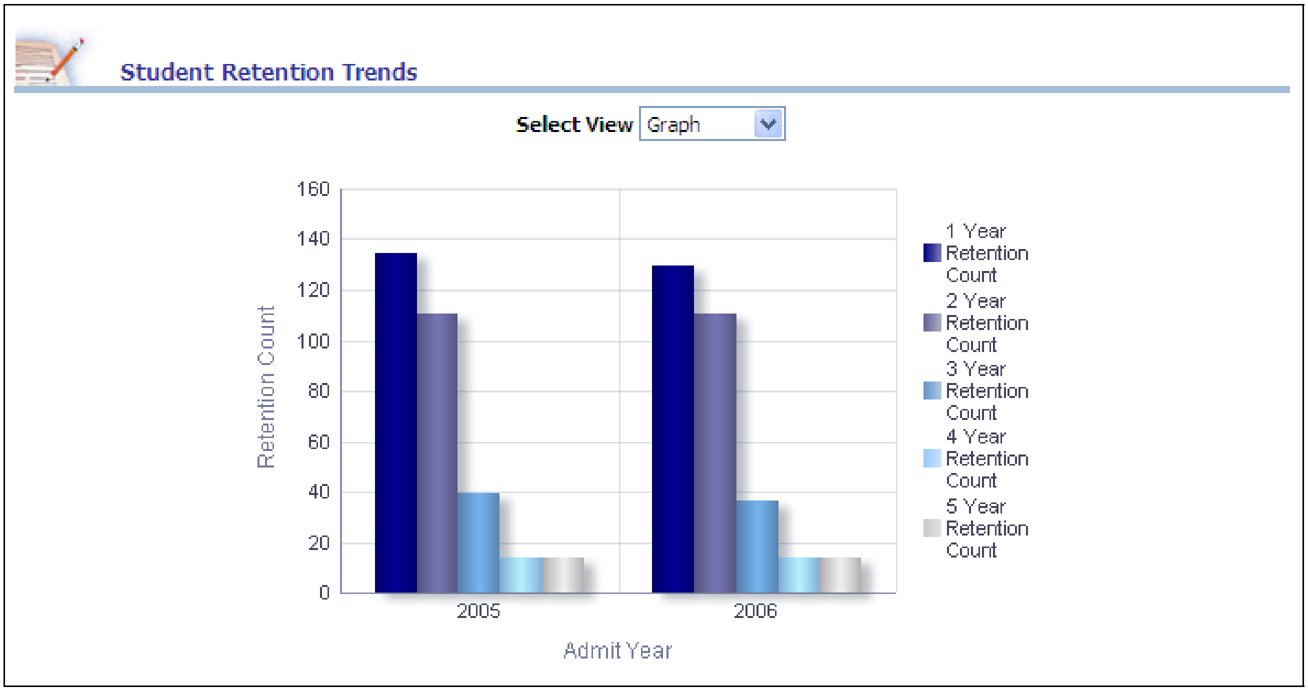
Award Disbursement Trends report

X,Y Axis Data	***Aid Year Filter***	***View By Filter***
The Award Disbursement Trends bar chart displays *Acceptance Amount* by *Institution* data on the x-axis and *Aid Year* data on the y-axis. The y-axis can display any of the following measures, depending on your Measure filter selection: • *Accepted Amount* (default) • *Authorized Amount* • *Award Count* • *Disbursed Amount* • *Offered Amount* 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: • *Academic Career* • *Ethnic Group* • *Financial Aid Source* • *Financial Aid Type* • *Gender* • *Institution* (default) **Note.** You can click on graph data to review drill down data.	Use this filter to refine the report results to a specific financial aid year.	Use this filter to view report results by: • *Academic Career* • *Ethnic Group* • *Financial Aid Source* • *Financial Aid Type* • *Gender* • *Institution* (default)

Measure Filter	***Select View Filter***
Use this filter to view report results by the following measures: • *Accepted Amount* (default) • *Authorized Amount* • *Award Count* • *Disbursed Amount* • *Offered Amount*	Use this filter to: • view the data in bar chart format • view the data in table format

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.



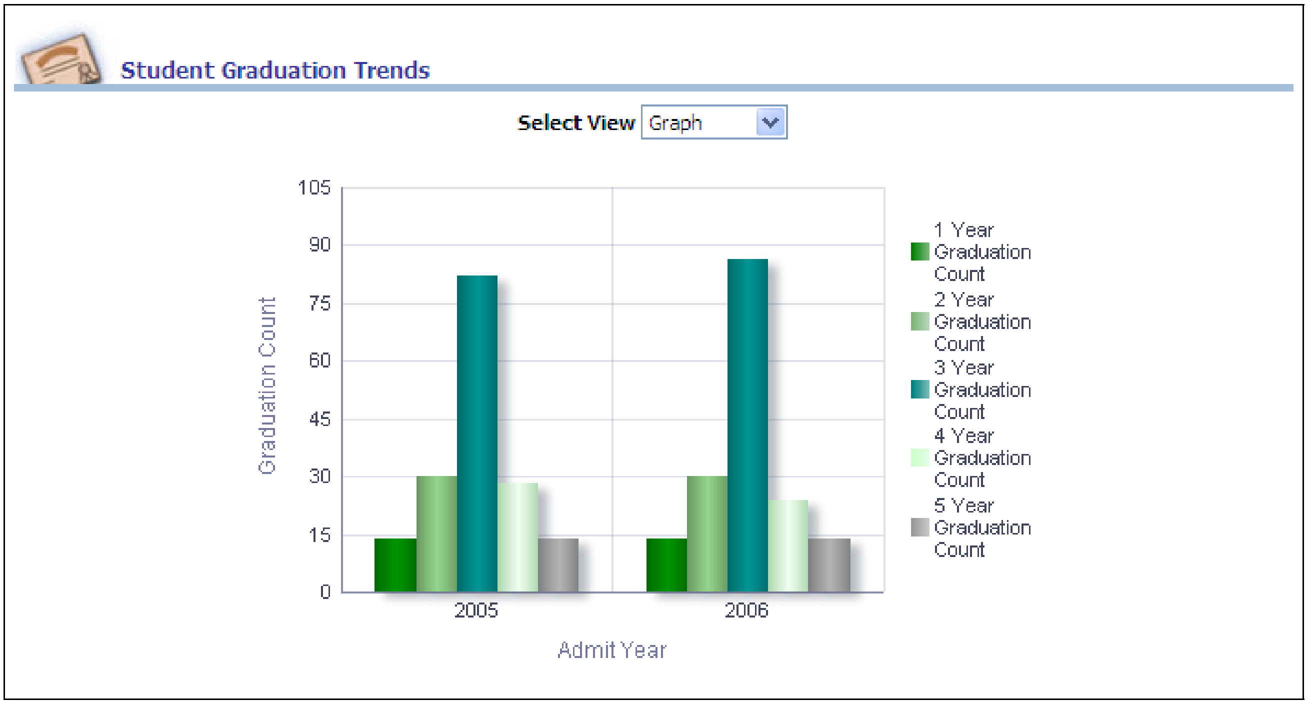
Student Retention Trends report

X,Y Axis Data	***Admit Year Filter***
The Student Retention Trends bar chart displays *Admit Year* data on the x-axis and *Retention Count* data on the y-axis.	Use this filter to refine the report results to a specific admit year.

Institution Filter	***Select View Filter***
Use this filter to refine the report results to a specific institution.	Use this filter to: • view the data in bar chart format • view the data in pivot table format

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.



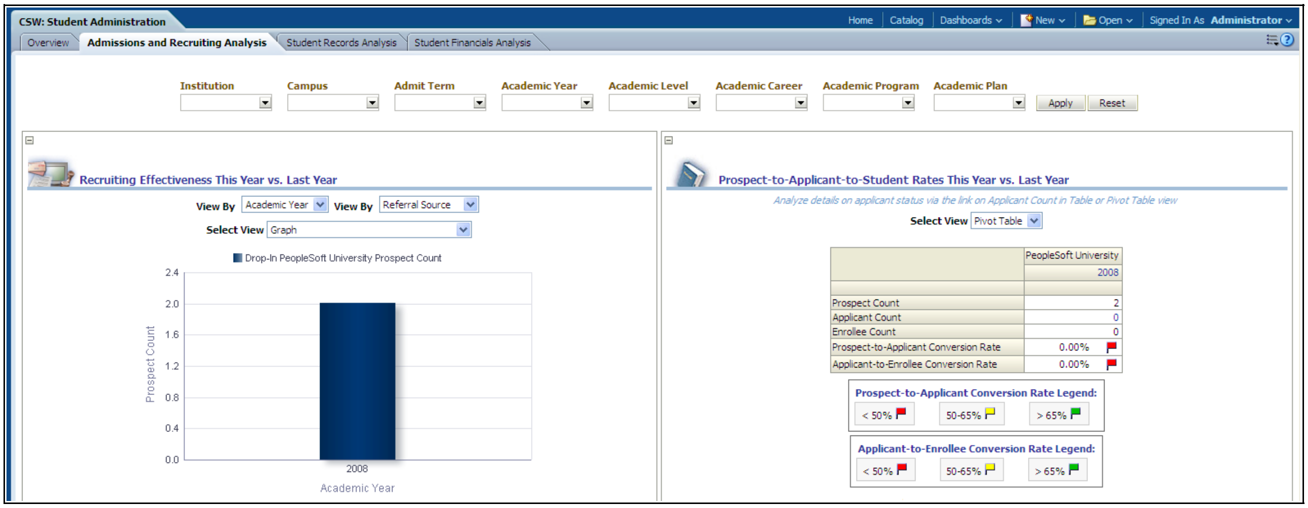
Student Graduation Trends report

X,Y Axis Data	***Admit Year Filter***
The Student Graduation Trends bar chart displays *Admit Year* data on the x-axis and *Graduation Count* data on the y-axis.	Use this filter to refine the report results to a specific admit year.

Institution Filter	***Select View Filter***
Use this filter to refine the report results to a specific institution.	Use this filter to: • view the data in bar chart format • view the data in pivot table format

Using the CSW: Student Administration Dashboard - Admissions and Recruiting Analysis Page

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

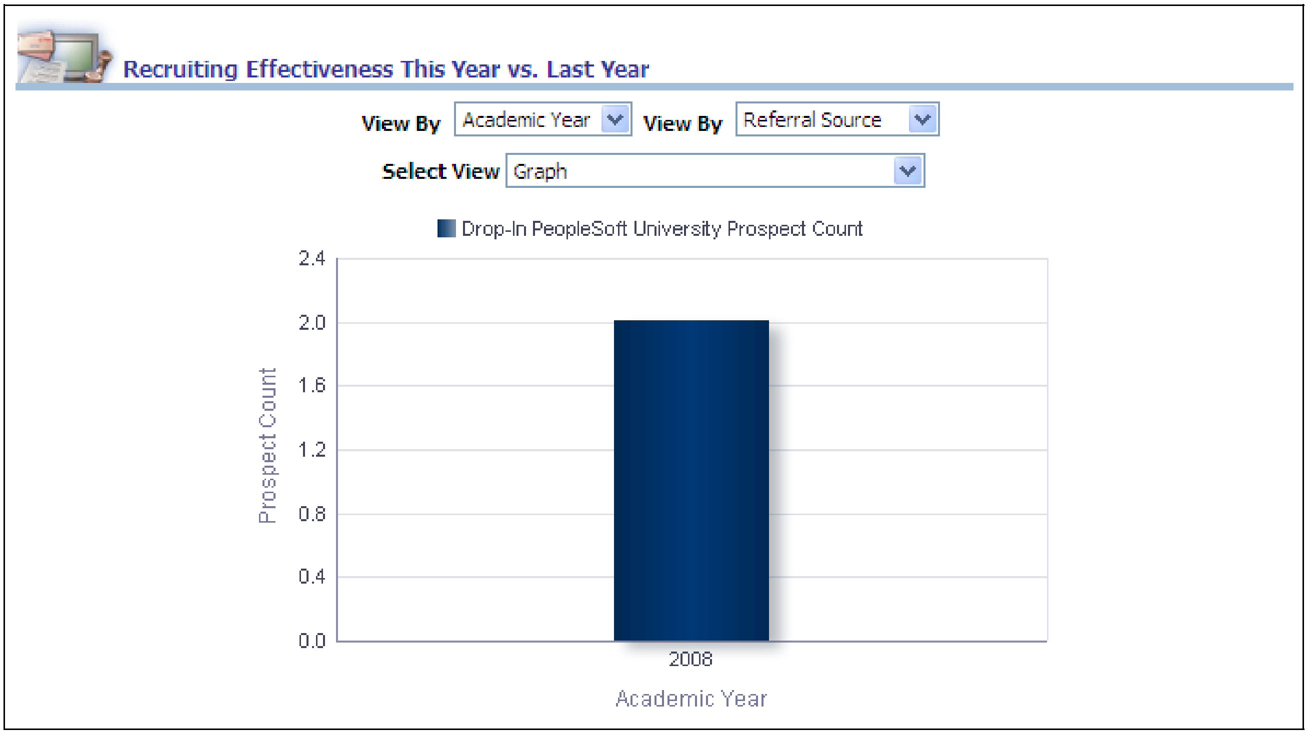


Admissions and Recruiting Analysis page

Usage	***Reports***	***Dashboard Prompt***
Provides an overview of recruiting and admissions effectiveness for your institution.	This page is comprised of the following reports: • Recruiting Effectiveness This Year vs. Last Year report • Prospect-to-Applicant-to-Student Rates This Year vs. Last Year report	Use the Admissions and Recruiting Analysis page prompt to filter page results by: • Institution • Campus • Admit Term • Academic Year • Academic Level • Academic Career • Academic Program • Academic Plan

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.

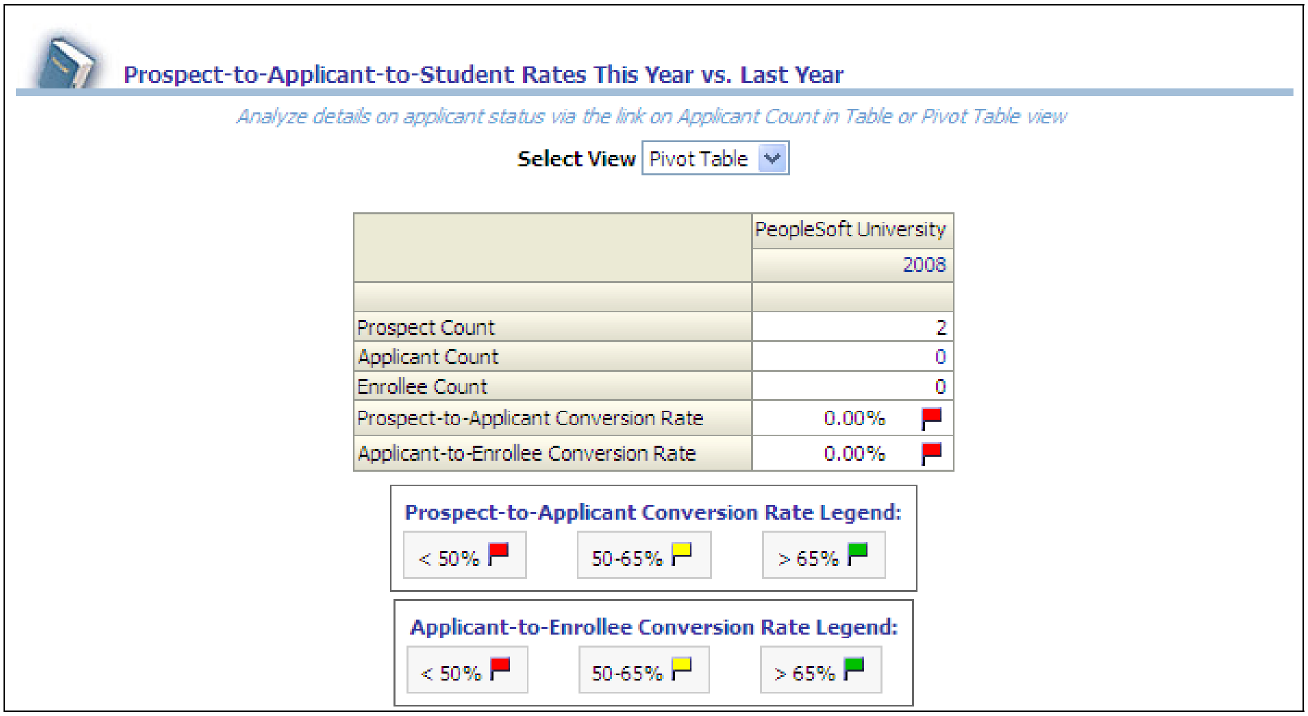


Recruiting Effectiveness This Year vs. Last Year report

X,Y Axis Data	***View By Filters***	***Select View Filter***
The Recruiting Effectiveness This Year vs. Last Year graph displays *Academic Year* data on the x-axis and *Prospect Count* by *Referral Source* data on the y-axis. The x-axis can display *Admit Term* data, depending on your selection in the first View by filter. 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: • *Recruiting Center* • *Recruiting Status* • *Referral Source* (default) **Note.** You can click on graph data to review drill down data for a particular admit term or academic year.	Use these filters to filter the report results by: • *Academic Year* (default value, available in the first filter only) • *Admit Term* (available in the first filter only) • *Recruiting Center* (available in the second filter only) • *Recruiting Status* (available in the second filter only) • *Referral Source* (default value, available in the second filter only)	Use this filter to: • view the data in bar chart format • present the data as a function of prospect count, year over year • present the data as a function of prospect count, percent of year total

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.



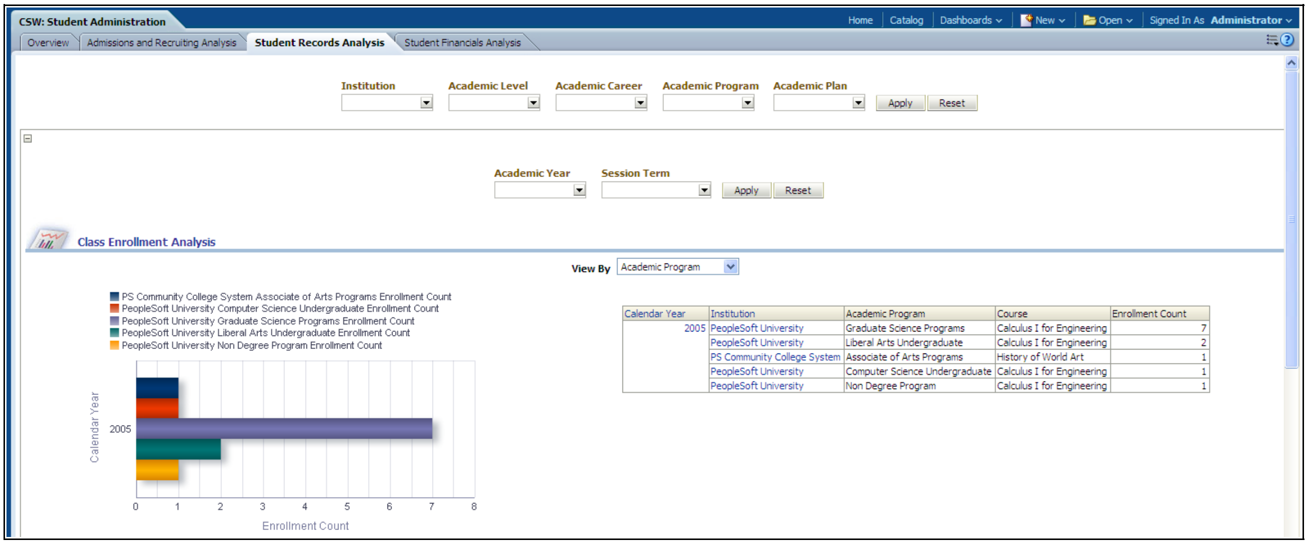
Prospect-to-Applicant-to-Student Rates This Year vs. Last Year report

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 CSW: Student Administration Dashboard - Student Records Analysis Page

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

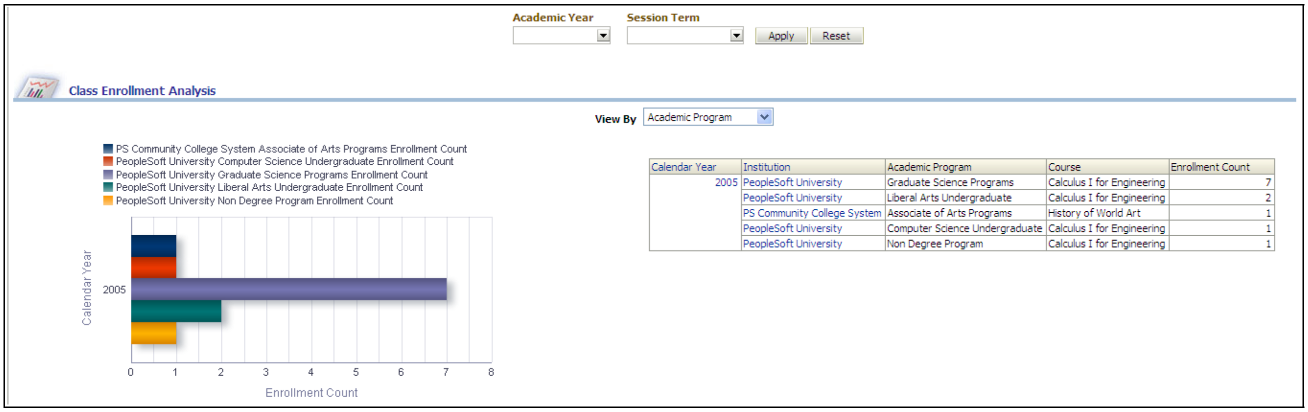


Student Records Analysis page

Usage	***Reports***	***Dashboard Prompt***
Provides you with an overview of class enrollment metrics and top student academic standings.	This page is comprised of the following reports: • Class Enrollment Analysis report • Top Student Academic Standings report	Use the Student Records Analysis page prompt to filter page results by: • Institution • Academic Level • Academic Career • Academic Program • Academic Plan

Class Enrollment Analysis Report

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



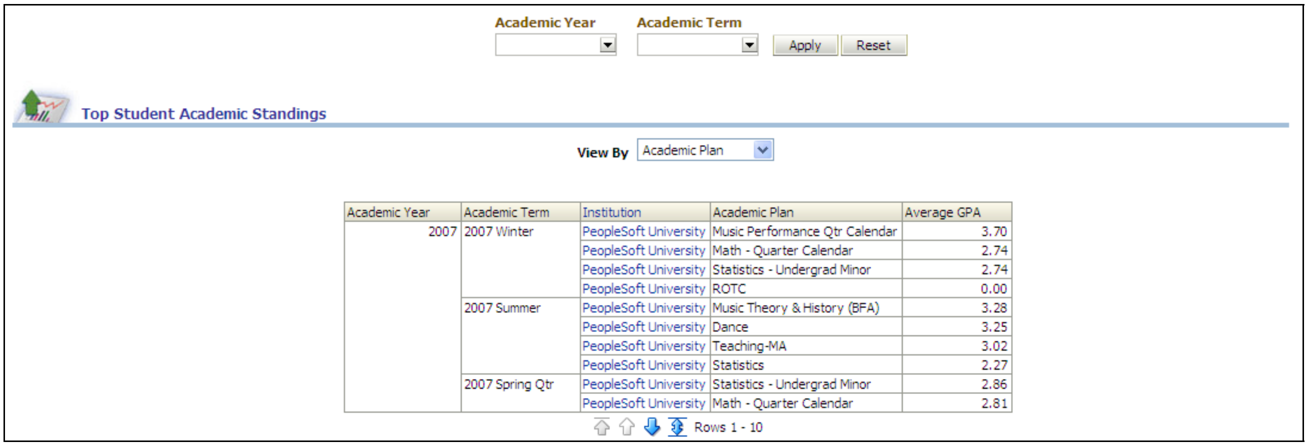
Class Enrollment Analysis report

X,Y Axis Data	***Calendar Year Filter***
The Class Enrollment Analysis bar chart displays *Enrollment Count* by *Academic Program* data on the x-axis and *Calendar Year* data on the y-axis. 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: • *Academic Career* • *Academic Group* • *Academic Organization* • *Academic Program* (default) • *Student Cohort* **Note.** You can click on graph data to review drill down data for a particular year and program.	Use this filter to refine the report results to a specific calendar year.

Session Term Filter	***View By Filter***
Use this filter to refine the report results to a specific session term.	Use this filter to view report results by: • *Academic Career* • *Academic Group* • *Academic Organization* • *Academic Program* (default) • *Student Cohort*

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.



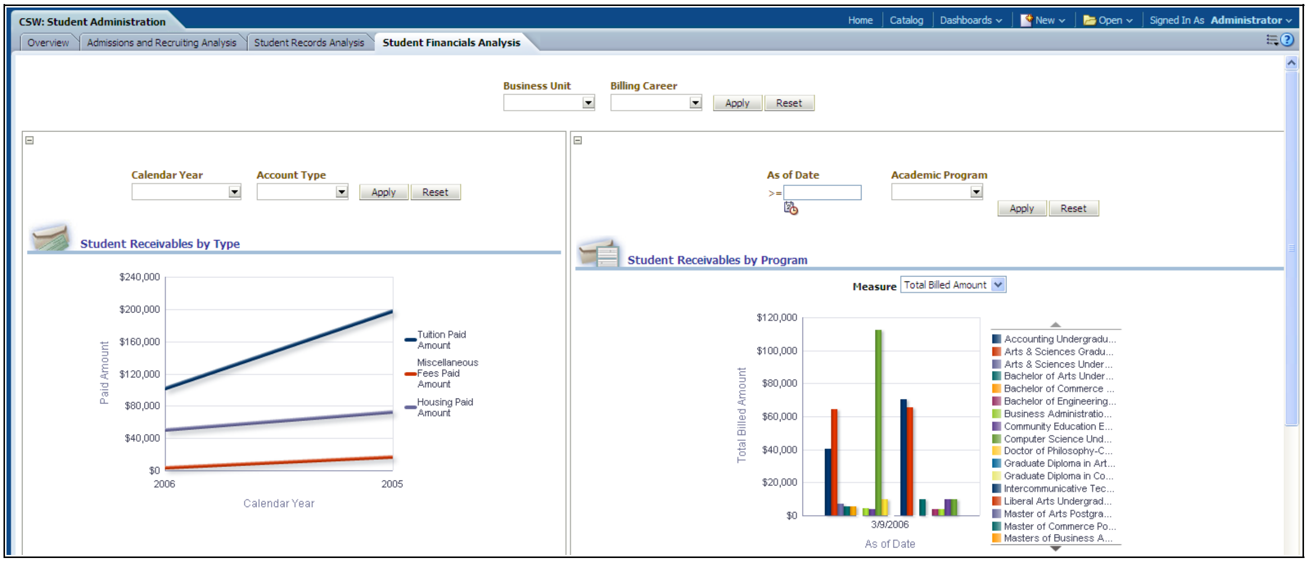
Academic Year	Academic Term	Institution	Academic Plan	Average GPA
2007	2007 Winter	PeopleSoft University	Music Performance Qtr Calendar	3.70
		PeopleSoft University	Math - Quarter Calendar	2.74
		PeopleSoft University	Statistics - Undergrad Minor	2.74
		PeopleSoft University	ROTC	0.00
	2007 Summer	PeopleSoft University	Music Theory & History (BFA)	3.28
		PeopleSoft University	Dance	3.25
		PeopleSoft University	Teaching-MA	3.02
		PeopleSoft University	Statistics	2.27
	2007 Spring Qtr	PeopleSoft University	Statistics - Undergrad Minor	2.86
		PeopleSoft University	Math - Quarter Calendar	2.81

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: • *Academic Level* • *Academic Plan* (default) • *Academic Program* • *Gender* • *Institution* • *Student Cohort*

Using the CSW: Student Administration Dashboard - Student Financials Analysis Page

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

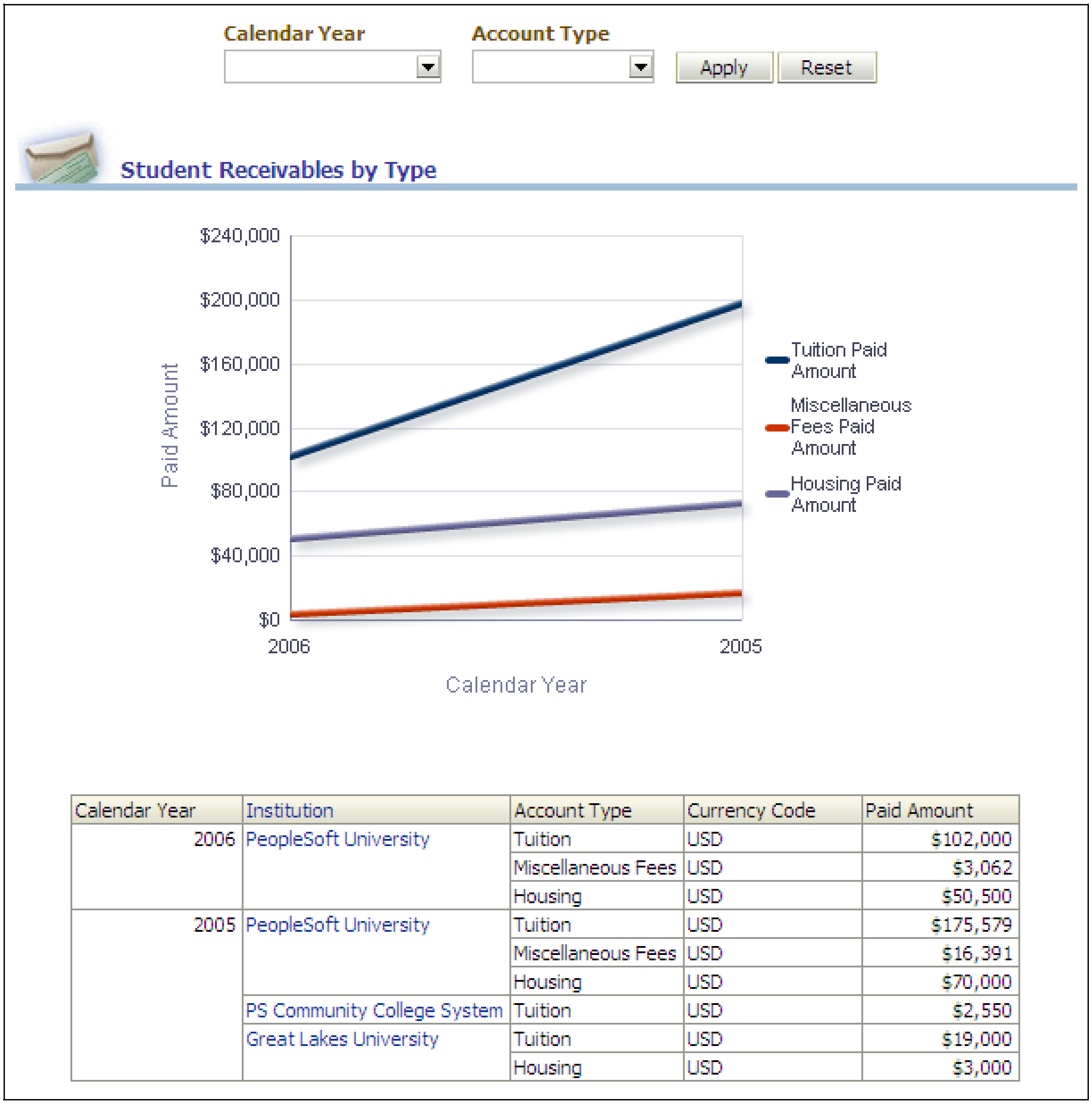


Student Financials Analysis page

Usage	*Reports*	*Dashboard Prompt*
Provides you with an overview of student receivables metrics for your institution.	This page is comprised of the following reports: • Student Receivables by Type report • Student Receivables by Program report	Use the Student Financials Analysis page prompt to filter page results by: • Institution • Academic Career

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.



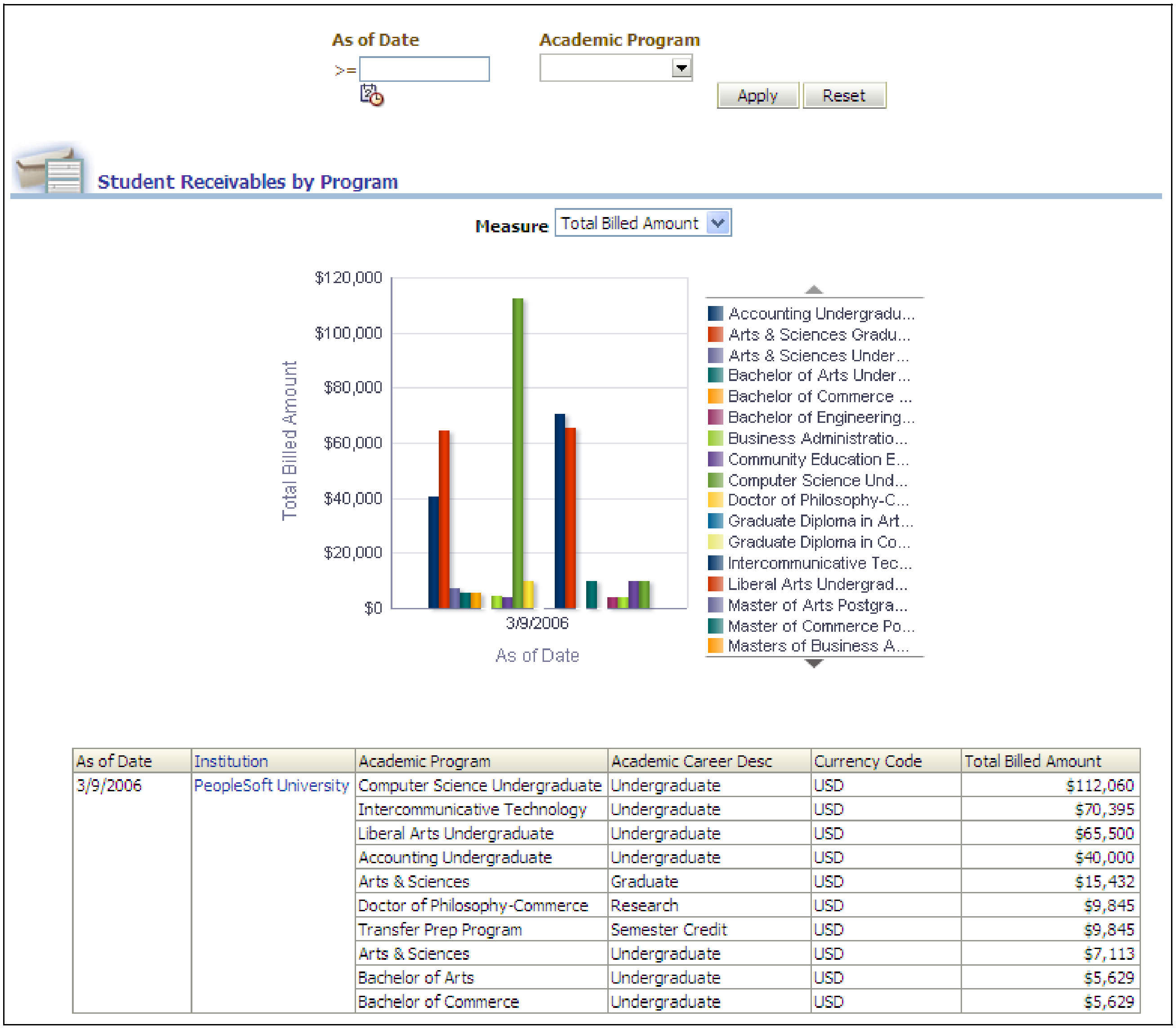
Calendar Year	Institution	Account Type	Currency Code	Paid Amount
2006	PeopleSoft University	Tuition	USD	$102,000
		Miscellaneous Fees	USD	$3,062
		Housing	USD	$50,500
2005	PeopleSoft University	Tuition	USD	$175,579
		Miscellaneous Fees	USD	$16,391
		Housing	USD	$70,000
	PS Community College System	Tuition	USD	$2,550
	Great Lakes University	Tuition	USD	$19,000
		Housing	USD	$3,000

Student Receivables by Type report

X,Y Axis Data	***Calendar Year Filter***	***Account Type Filter***
The Student Receivables by Type graph displays *Calendar Year* data on the x-axis and *Paid Amount* by *Account Type* 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.



As of Date	Institution	Academic Program	Academic Career Desc	Currency Code	Total Billed Amount
3/9/2006	PeopleSoft University	Computer Science Undergraduate	Undergraduate	USD	$112,060
		Intercommunicative Technology	Undergraduate	USD	$70,395
		Liberal Arts Undergraduate	Undergraduate	USD	$65,500
		Accounting Undergraduate	Undergraduate	USD	$40,000
		Arts & Sciences	Graduate	USD	$15,432
		Doctor of Philosophy-Commerce	Research	USD	$9,845
		Transfer Prep Program	Semester Credit	USD	$9,845
		Arts & Sciences	Undergraduate	USD	$7,113
		Bachelor of Arts	Undergraduate	USD	$5,629
		Bachelor of Commerce	Undergraduate	USD	$5,629

Student Receivables by Program report

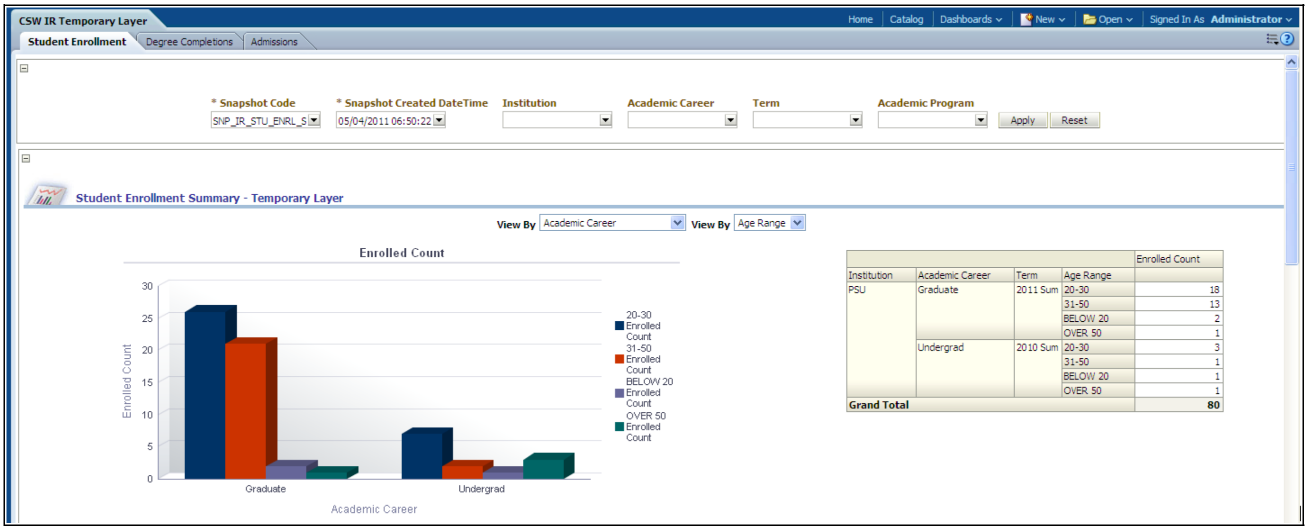
X,Y Axis Data	***As of Date Filter***
The Student Receivables by Program graph displays *As of Date* data on the x-axis and *Total Billed Amount* by *Academic Program* data on the y-axis. The y-axis can display any of the following measures, depending on your Measure filter selection: • *Total Paid Amount* • *Total Billed Amount* (default) **Note.** You can click on graph data to review drill down data.	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).

Academic Program Filter	***Measure Filter***
Use this filter to refine the report results to a specific academic program.	Use this filter to view report results by the following measures: • *Total Billed Amount* (default) • *Total Paid Amount*

Using the CSW: Institutional Research Dashboard - Student Enrollment Page

Access the Student Enrollment (temporary) page (Dashboards, CSW IR Reports, CSW IR Temporary Layer, Student Enrollment).

To access the frozen version of the Student Enrollment page (Dashboards, CSW IR Reports, CSW IR Frozen Layer, Student Enrollment)

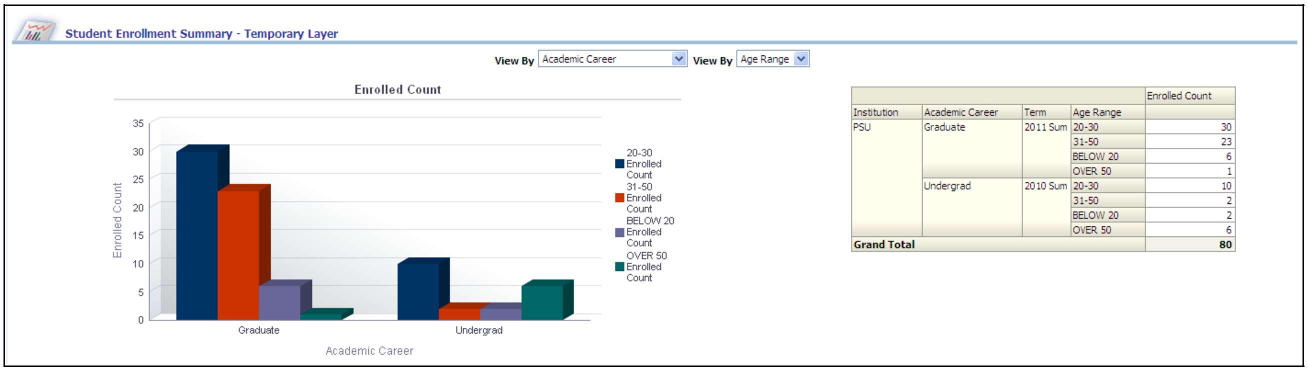


Student Enrollment (temporary) page

Usage	***Reports***	***Dashboard Prompt***
Provides you with overview of student enrollment and student enrollment by athlete and degree/non degree seeking individuals, for a given snapshot code and snapshot creation date and time.	This page is comprised of the following reports: • Student Enrollment Summary • Degree Seeking Students Summary • Non Degree Seeking Students Summary • Student Enrollment Analysis By Athlete	Use the Student Enrollment page prompts to filter page results by: • Snapshot Code • Snapshot Created Date Time • Institution • Academic Career • Term • Academic Program

Student Enrollment Summary Report

Access the Student Enrollment Summary (temporary) report, which enables you to analyze enrolled students by academic level, age range, gender, ethnicity, and so forth.



Student Enrollment Summary (temporary) report

X,Y Axis Data	***View by Filter (Left)***	***View by Filter (Right)***
The Student Enrollment Summary graph displays *academic career* and *age range* data on the x-axis and *enrollment count* data on the y-axis. The x-axis can also plot any of the following dimensions, depending on either of the two View By filter selections: • Academic Career • Academic Level • Academic Load • Academic Program • Admit Type • Campus • Last school attended • Ethnicity • Age Range • Gender	Use this filter to view the Student Enrollment Summary report results by: • Academic Career • Academic Level • Academic Load • Academic Program • Admit Type • Campus • Last school attended • Ethnicity	Use this filter to view the Student Enrollment Summary report results by: • Age Range • Gender

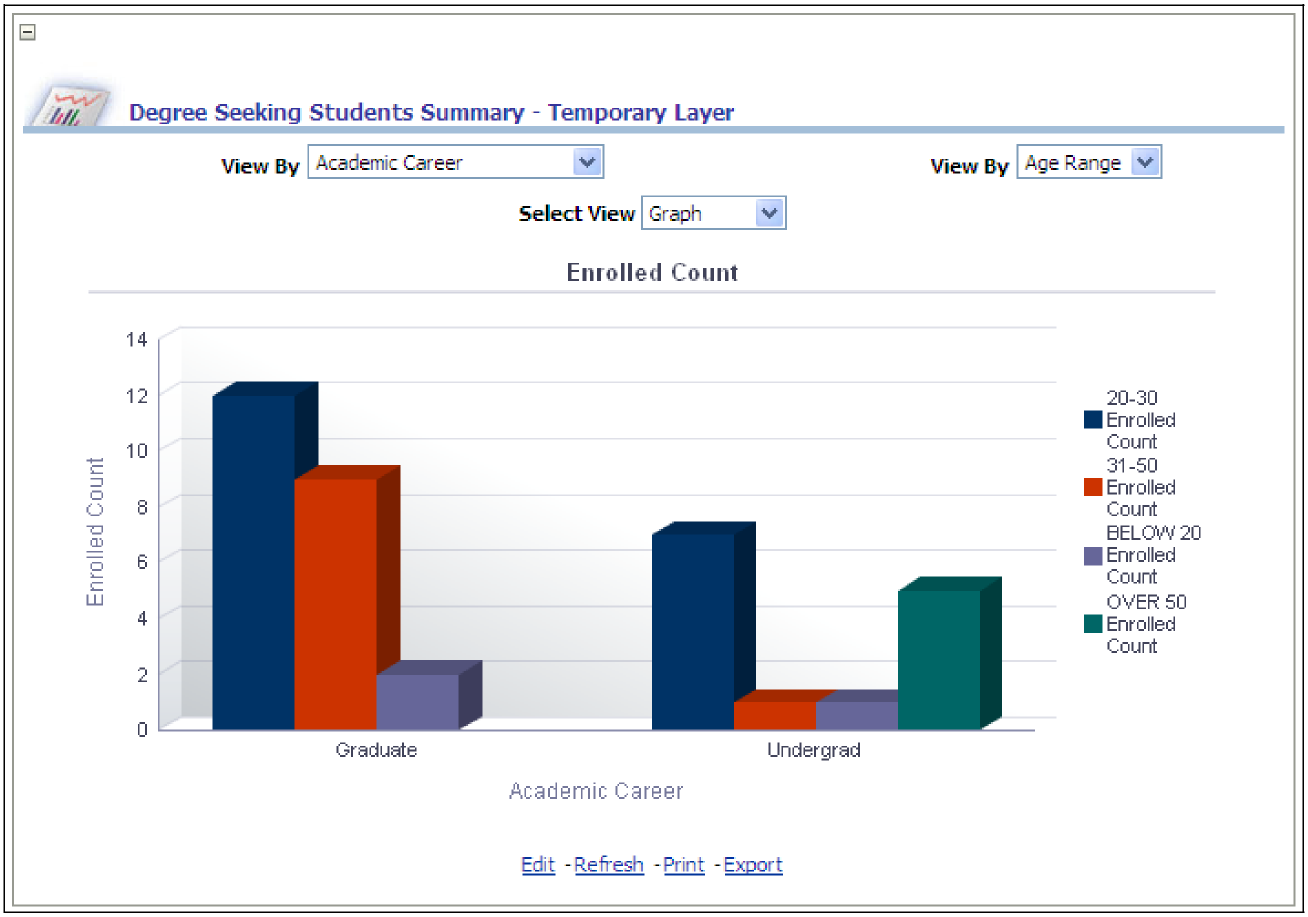
The following table lists the columns and measures used in the Student Enrollment Summary (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Career	Academic Career (PS_TD_ACAD_CAR) Dimension
Academic Level	Academic Level (PS_TD_ACAD_LVL) Dimension
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Program	Academic Program (PS_TD_ACAD_PROG) Dimension
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Last School Attended	Last School Attended (PS_TD_EXT_ORG) Dimension
Ethnicity	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Age Range	Person (PS_TD_PERSON) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Enrolled Count	Student Enrollment (PS_TF_STDNT_ENRL) Fact

Degree Seeking Students Summary Report

Access the Degree Seeking Students Summary (temporary) report, which enables you to analyze degree seeking student enrollment by academic level, age range, gender, ethnicity, and so forth.



Degree Seeking Students Summary (temporary) report

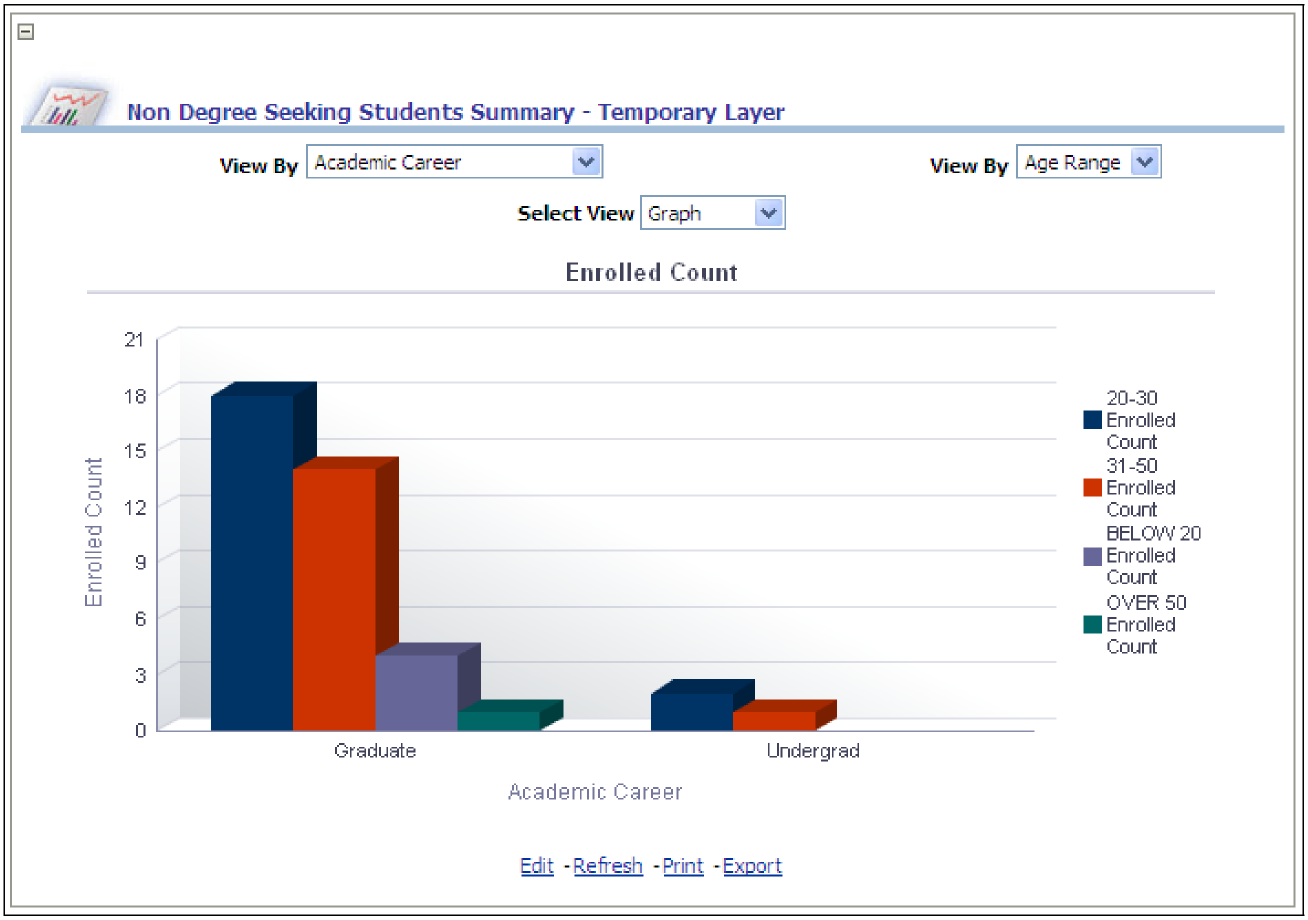
X,Y Axis Data	***View By Filter (Left)***	***View By Filter (Right)***	***Select View***
The Degree Seeking Students Summary graph displays *academic career* and *age range* data on the x-axis and *enrollment count* data for degree seeking students on the y-axis. The x-axis can also plot any of the following dimensions, depending on either of the two View By filter selections: • Academic Career • Academic Level • Academic Load • Campus • Last school attended • Ethnicity • Age Range • Gender	Use this filter to view the Degree Seeking Students Summary report results by: • Academic Career • Academic Level • Academic Load • Campus • Last school attended • Ethnicity	Use this filter to view the Degree Seeking Students Summary report results by: • Age Range • Gender	Use this filter to: • view the data in bar graph (chart) format • view the data in pivot table format

The following table lists the columns and measures used in the Degree Seeking Students Summary (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Career	Academic Career (PS_TD_ACAD_CAR) Dimension
Academic Level	Academic Level (PS_TD_ACAD_LVL) Dimension
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Last School Attended	Last School Attended (PS_TD_EXT_ORG) Dimension
Ethnicity	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Age Range	Person (PS_TD_PERSON) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Enrolled Count	Student Enrollment (PS_TF_STDNT_ENRL) Fact

Non Degree Seeking Students Summary Report

Access the Non Degree Seeking Students Summary (temporary) report, which enables you to analyze non degree seeking student enrollment by academic level, age range, gender, ethnicity, and so forth.



Non Degree Seeking Students Summary (temporary) report

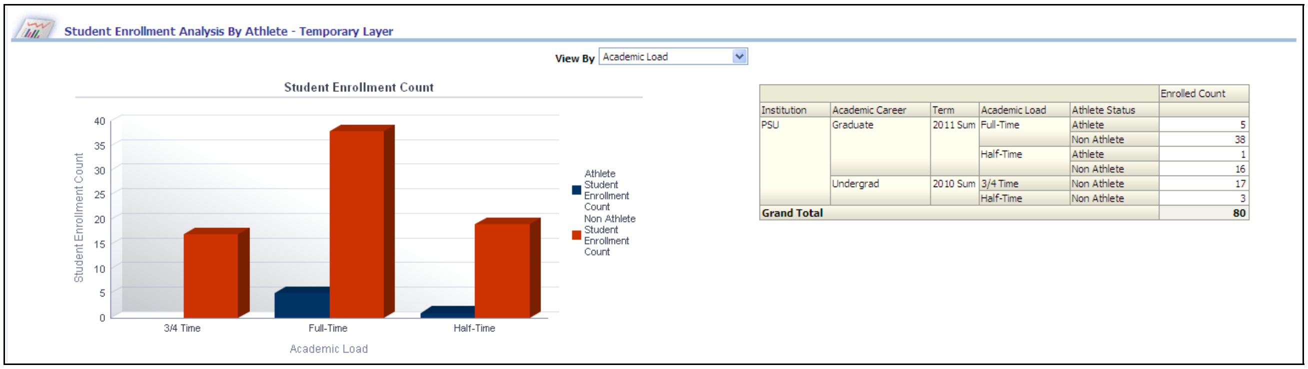
X,Y Axis Data	***View By Filter (Left)***	***View By Filter (Right)***	***Select View***
The Non Degree Seeking Students Summary graph displays *academic career* and *age range* data on the x-axis and *enrollment count* data for non degree seeking students on the y-axis. The x-axis can also plot any of the following dimensions, depending on either of the two View By filter selections: • Academic Career • Academic Level • Academic Load • Campus • Ethnicity • Last school attended • Age Range • Gender	Use this filter to view the Non Degree Seeking Students Summary report results by: • Academic Career • Academic Level • Academic Load • Campus • Ethnicity • Last school attended	Use this filter to view the Non Degree Seeking Students Summary report results by: • Age Range • Gender	Use this filter to: • view the data in bar graph (chart) format • view the data in pivot table format

The following table lists the columns and measures used in the Non Degree Seeking Students Summary (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Career	Academic Career (PS_TD_ACAD_CAR) Dimension
Academic Level	Academic Level (PS_TD_ACAD_LVL) Dimension
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Last School Attended	Last School Attended (PS_TD_EXT_ORG) Dimension
Ethnicity	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Age Range	Person (PS_TD_PERSON) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Enrolled Count	Student Enrollment (PS_TF_STDNT_ENRL) Fact

Student Enrollment Analysis By Athlete Report

Access the Student Enrollment Analysis By Athlete (temporary) report, which enables you to analyze student athlete enrollment by academic level, age range, gender, ethnicity, and so forth.



Student Enrollment Analysis By Athlete (temporary) report

X,Y Axis Data	***View By Filter***
The Student Enrollment Analysis By Athlete graph displays *academic load* and *age range* data on the x-axis and *student enrollment count* data for athletes and non-athletes on the y-axis. The x-axis can also plot any of the following dimensions, depending on your View By filter selection: • Academic Load • Academic Career • Academic Level • Campus • Admit Type • Age Range • Last school attended • Ethnicity • Gender	Use this filter to view the Student Enrollment Analysis By Athlete report results by: • Academic Load • Academic Career • Academic Level • Campus • Admit Type • Age Range • Last school attended • Ethnicity • Gender

The following table lists the columns and measures used in the Student Enrollment Analysis By Athlete (temporary) report.

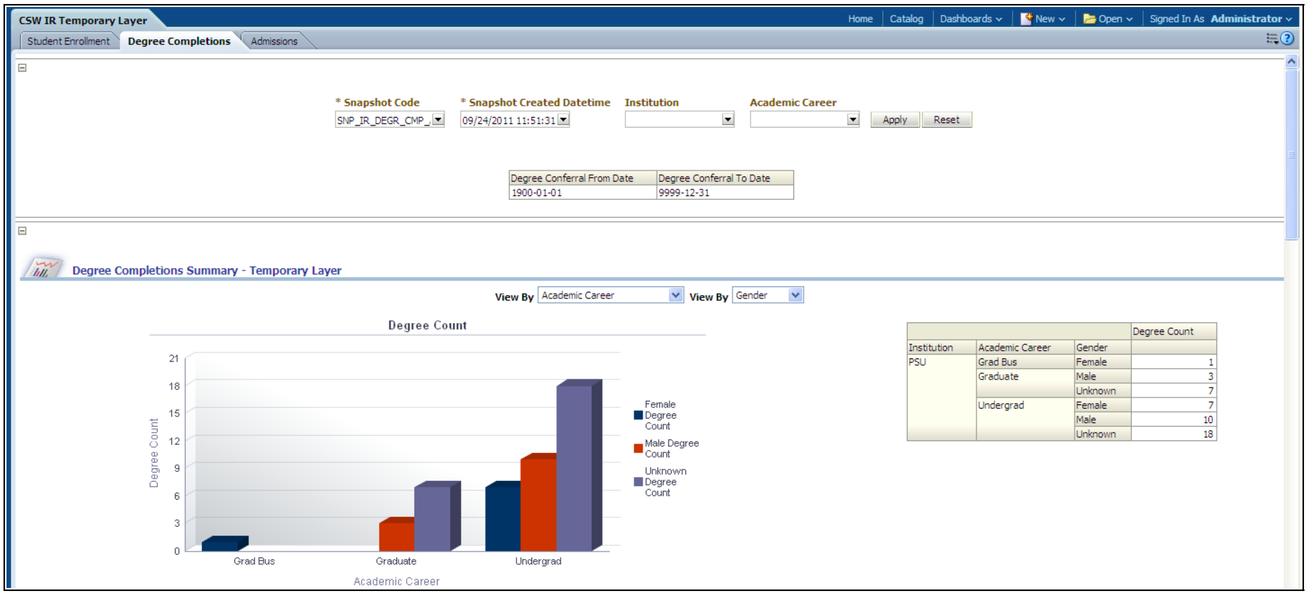
Report Column / Measure Name	***Report Column / Measure Origin***
Academic Career	Academic Career (PS_TD_ACAD_CAR) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Level	Academic Level (PS_TD_ACAD_LVL) Dimension
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Last School Attended	Last School Attended (PS_TD_EXT_ORG) Dimension
Ethnicity	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Age Range	Person (PS_TD_PERSON) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Enrolled Count	Student Enrollment (PS_TF_STDNT_ENRL) Fact

Using the CSW: Institutional Research Dashboard - Degree Completions Page

Access the Degree Completions (temporary) page (Dashboards, CSW IR Reports, CSW IR Temporary Layer, Degree Completions).

To access the frozen version of the Degree Completions page (Dashboards, CSW IR Reports, CSW IR Frozen Layer, Degree Completions)

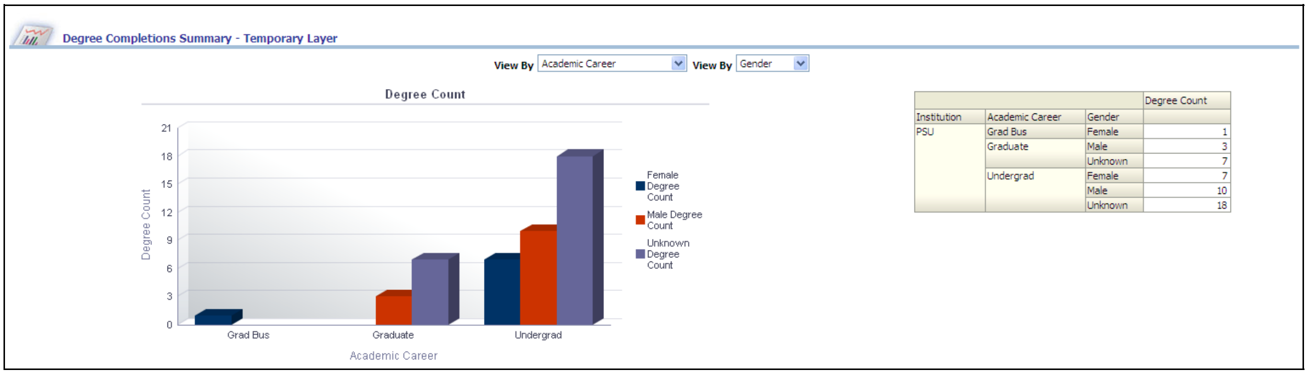


Degree Completions (temporary) page

Usage	***Reports***	***Dashboard Prompt***
Provides you with an overview of degree completions by primary and secondary majors, student athletes, and award trends.	This page is comprised of the following reports: • Degree Completions Summary • Degree Completions Summary By Primary Major • Degree Completions Summary By Secondary Major • Degree Completions Award Trend • Graduated Trend By Athlete	Use the Degree Completions page prompts to filter page results by: • Snapshot Code • Snapshot Created Date Time • Institution • Academic Career

Degree Completions Summary Report

Access the Degree Completions Summary (temporary) report, which enables you to analyze student degree completions by academic plan, degree, age range, gender, ethnicity, and so forth.



Degree Completions Summary (temporary) report

X,Y Axis Data	***View By Filter (Left)***	***View By Filter (Right)***
The Degree Count Summary graph displays *academic career* and *gender* data on the x-axis and *degree count* data on the y-axis. The x-axis can also plot any of the following dimensions, depending on either of the two View By filter selections: • Academic Career • Academic Plan • Academic Load • Admit Type • Campus • Degree • Ethnicity • Degree Status • Last school attended • Gender • Age Range	Use this filter to view the Degree Completions Summary report results by: • Academic Career • Academic Plan • Academic Load • Admit Type • Campus • Degree • Ethnicity • Degree Status • Last school attended	Use this filter to view the Degree Completions Summary report results by: • Gender • Age Range

The following table lists the columns and measures used in the Degree Completions Summary (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Career	Academic Career (PS_TD_ACAD_CAR) Dimension
Academic Plan	Academic Plan (PS_TD_ACAD_PLAN) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Degree	Degree (PS_TD_DEG) Dimension
Degree Status	Degree Status (PS_TD_DEG_STAT) Dimension
Ethnicity	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Institution	Institution (D_INSTITUTION) Dimension
Last School Attended	Last School Attended (PS_TD_EXT_ORG) Dimension
Age Range	Person (PS_TD_PERSON) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Degree Count	Completions (PS_TF_DEG_COMPLTN) Fact

Degree Completions Summary By Primary Major Report

Access the Degree Completions Summary By Primary Major (temporary) report, which enables you to analyze student degree completions by primary major, academic plan, degree, and so forth.

Degree Completions Summary By Primary Major (temporary) report

X,Y Axis Data	***CIP (Classification of Instructional Programs) Code***
The Degree Completions Summary By Primary Major graph displays *academic plan* and *gender* data on the x-axis and *student degree count* data on the y-axis. The x-axis can also plot any of the following dimensions, depending on either of the two View By filter selections: • Academic Plan • Academic Load • Admit Type • Campus • Degree • Last school attended • Gender • Ethnicity • Age Range • Student Group • Degree Status	Use this filter to narrow results of the Degree Completions Summary By Primary Major report by the Classification of Instructional Programs. You can select multiple CID codes.

View by Filter (Left)	***View by Filter (Right)***	***Select View***
Use this filter to view the Degree Completions Summary By Primary Major report results by: • Academic Plan • Academic Load • Admit Type • Campus • Degree • Last school attended	Use this filter to view the Degree Completions Summary By Primary Major report results by: • Gender • Ethnicity • Age Range • Student Group • Degree Status	Use this filter to: • view the data in bar graph (chart) format • view the data in pivot table format

The following table lists the columns and measures used in the Degree Completions Summary By Primary Major (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
CIP Code (CIP_LD)	Academic Plan (PS_TD_ACAD_PLAN) Dimension
Academic Plan	Academic Plan (PS_TD_ACAD_PLAN) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Degree	Degree (PS_TD_DEG) Dimension
Last School Attended	Last School Attended (PS_TD_EXT_ORG) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Age Range	Person (PS_TD_PERSON) Dimension
Ethnicity	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Student Group	Student Group (PS_TD_STDNT_GRP) Dimension
Degree Status	Degree Status (PS_TD_DEG_STAT) Dimension
Degree Count	Completions (PS_TF_DEG_COMPLTN) Fact

Degree Completions Summary By Secondary Major Report

Access the Degree Completions Summary By Secondary Major (temporary) report, which enables you to analyze student degree completions by secondary major and academic plan, degree, and so forth.

Degree Completions Summary By Secondary Major (temporary) report

X,Y Axis Data	***CIP (Classification of Instructional Programs) Code***
The Degree Completions Summary By Secondary Major graph displays *academic plan* and *gender* data on the x-axis and *student degree count* data on the y-axis. The x-axis can also plot any of the following dimensions, depending on either of the two View By filter selections: • Academic Plan • Academic Load • Admit Type • Campus • Degree • Last school attended • Gender • Ethnicity • Age Range • Student Group • Degree Status	Use this filter to narrow results of the Degree Completions Summary By Secondary Major report by the Classification of Instructional Programs. You can select multiple CID codes.

View by Filter (Left)	***View by Filter (Right)***	***Select View***
Use this filter to view the Degree Completions Summary By Secondary Major report results by: • Academic Plan • Academic Load • Admit Type • Campus • Degree • Last school attended	Use this filter to view the Degree Completions Summary By Secondary Major report results by: • Gender • Ethnicity • Age Range • Student Group • Degree Status	Use this filter to: • view the data in bar graph (chart) format • view the data in pivot table format

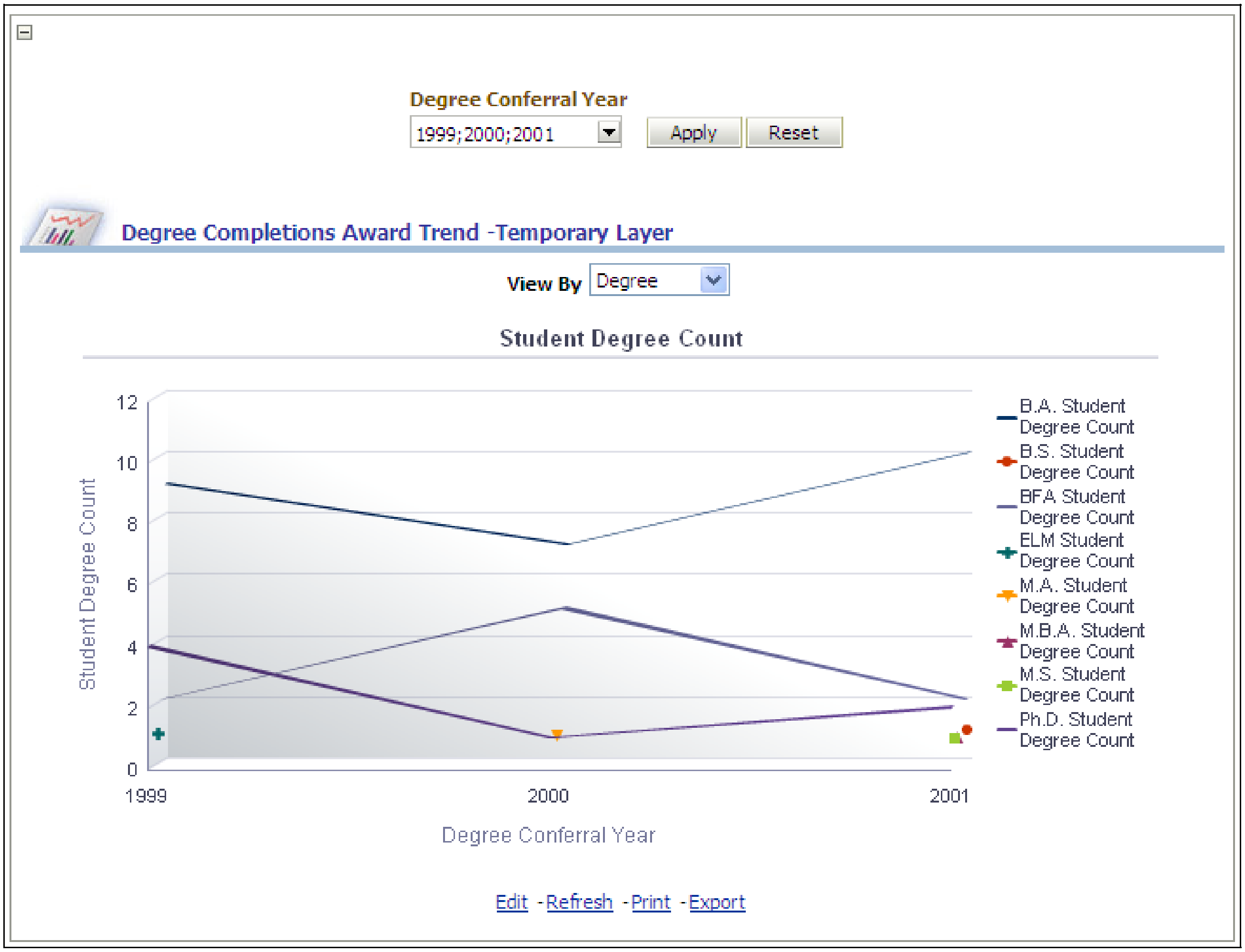
The following table lists the columns and measures used in the Degree Completions Summary By Secondary Major (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
CIP Code (CIP_LD)	Academic Plan (PS_TD_ACAD_PLAN) Dimension
Academic Plan	Academic Plan (PS_TD_ACAD_PLAN) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Degree	Degree (PS_TD_DEG) Dimension
Last School Attended	Last School Attended (PS_TD_EXT_ORG) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Age Range	Person (PS_TD_PERSON) Dimension
Ethnicity	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Student Group	Student Group (PS_TD_STDNT_GRP) Dimension
Degree Status	Degree Status (PS_TD_DEG_STAT) Dimension
Degree Count	Completions (PS_TF_DEG_COMPLTN) Fact

Degree Completions Award Trend Report

Access the Degree Completions Award Trend (temporary) report, which enables you to analyze degree completion trends by gender, degree type, and so forth.



Degree Completions Award Trend (temporary) report

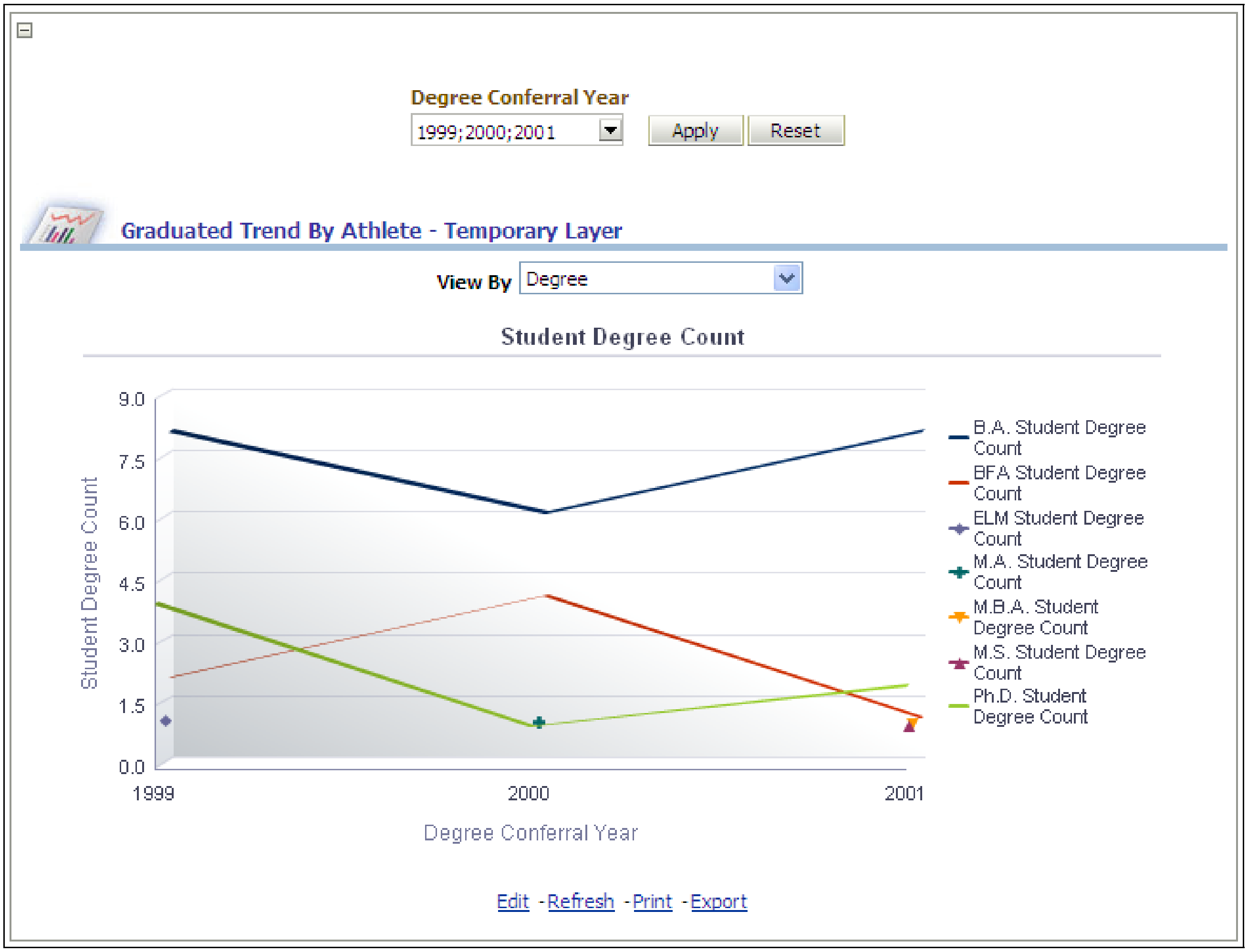
X,Y Axis Data	***Degree Conferral Year***	***View by Filter***
The Degree Completions Award Trend graph displays *degree conferral year* data on the x-axis and *student degree count* data by degree type on the y-axis, with *degree* (type) plotted across the x-y axis. The graph can also plot any of the following dimensions across the x-y axis, depending on your View By filter selection: • Degree • Admit Type • Campus • Gender	Use this filter to narrow results of the Degree Completions Award Trend report to specific degree conferral years. You can select multiple conferral years.	Use this filter to view the Degree Completions Award Trend report results by: • Degree • Admit Type • Campus • Gender

The following table lists the columns and measures used in the Degree Completions Award Trend (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Degree	Degree (PS_TD_DEG) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Degree Conferral Year (YEAR_NUM)	Day (PS_D_DAY) Dimension
Degree Count	Completions (PS_TF_DEG_COMPLTN) Fact

Graduated Trend By Athlete Report

Access the Graduated Trend By Athlete (temporary) report, which enables you to analyze degree completion trends for student athletes by ethnicity, gender, degree type, and so forth.



Graduated Trend By Athlete (temporary) report

X,Y Axis Data	***Degree Conferral Year***	***View by Filter***
The Graduated Trend By Athlete graph displays *degree conferral year* data on the x-axis and *student degree count* data by degree type on the y-axis, with *degree* (type) plotted across the x-y axis. The graph can also plot any of the following dimensions across the x-y axis, depending on your View By filter selection: • Degree • Academic Load • Admit Type • Campus • Last school attended • Ethnicity • Age Range • Gender • Student Group	Use this filter to narrow results of the Graduated Trend By Athlete report to specific degree conferral years. You can select multiple conferral years.	Use this filter to view the Graduated Trend By Athlete report results by: • Degree • Academic Load • Admit Type • Campus • Last school attended • Ethnicity • Age Range • Gender • Student Group

The following table lists the columns and measures used in the Graduated Trend By Athlete (temporary) report.

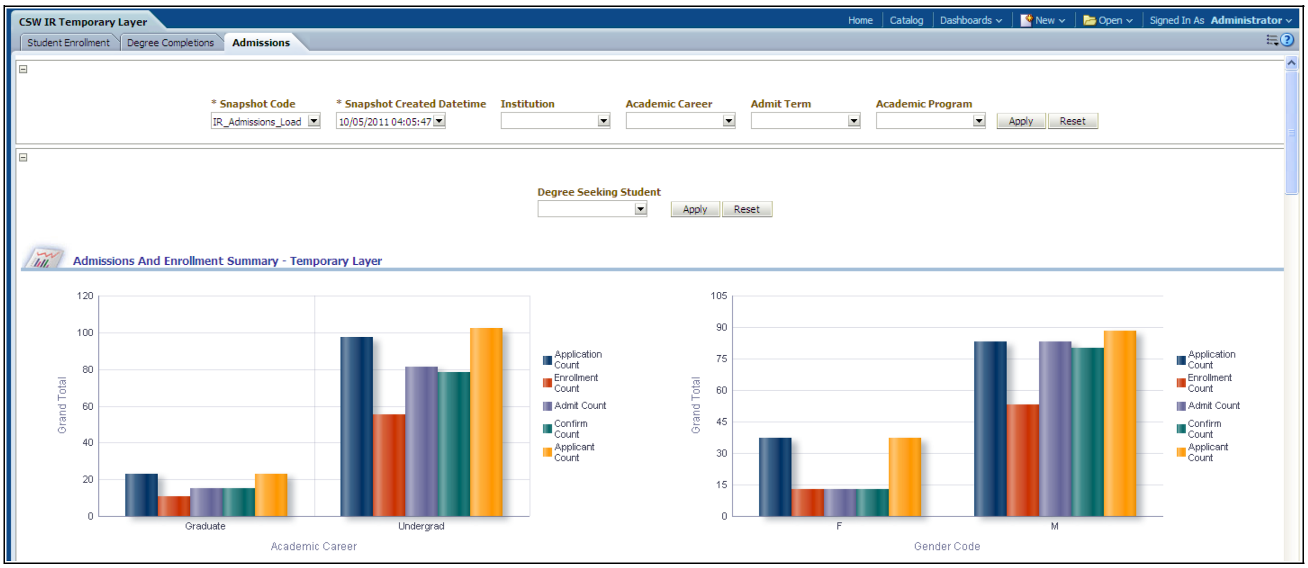
Report Column / Measure Name	***Report Column / Measure Origin***
Degree	Degree (PS_TD_DEG) Dimension
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Last school attended	Last School Attended (PS_TD_EXT_ORG) Dimension
Age Range	Person (PS_TD_PERSON) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Ethnicity	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Student Group	Student Group (PS_TD_STDNT_GRP) Dimension
Degree Conferral Year (YEAR_NUM)	Day (PS_D_DAY) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Degree Count	Completions (PS_TF_DEG_COMPLTN) Fact

Using the CSW: Institutional Research Dashboard - Admissions Page

Access the Admissions (temporary) page (Dashboards, CSW IR Reports, CSW IR Temporary Layer, Admissions).

To access the frozen version of the Admissions page (Dashboards, CSW IR Reports, CSW IR Frozen Layer, Admissions).

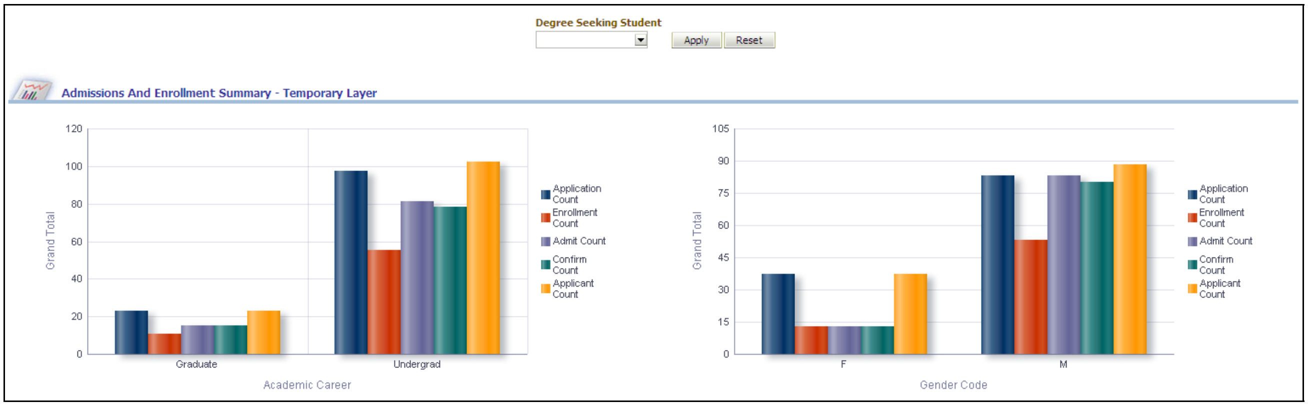


Admissions (temporary) page

Usage	***Reports***	***Dashboard Prompt***
Provides you with an overview of student admissions and enrollment.	This page is comprised of the following reports: • Admissions and Enrollment Summary • Trend Analysis by Admit Term and Test Scores Submitted (SAT/ACT) • Student Test Scores (SAT/ACT) Summary • Applicant External Organization Summary by GPA	Use the Admissions page prompts to filter page results by: • Snapshot Code • Snapshot Created Date Time • Institution • Academic Career • Admit Term • Academic Program

Admissions and Enrollment Summary Report

Access the Admissions and Enrollment Summary (temporary) report, which enables you to analyze student admission and enrollment by ethnicity, gender, academic program, and so forth.



Admissions and Enrollment Summary (temporary) report, part 1

View By Academic Plan View By Admit Type

Institution	Admit Term	Academic Plan	Admit Type	Gender Code	Application Count	Applicant Count	Enrollment Count	Confirm Count	Admit Count	Enrollment %	Admit %	Confirm %	Yield %
PSU	2005 FlQt	Math Mnr G	Internals	F	1	1	0	0	0	0%	0%	0%	0%
	2006 Spr	MUS-MIN	TRF-Ugrad	M	1	1	0	1	1	0%	100%	100%	0%
		Math Mnr G	Readmit	F	2	2	0	0	0	0%	0%	0%	0%
		Math U Min	Regular	M	1	1	0	1	1	0%	100%	100%	0%
		Music Perf	TRF-Ugrad	M	1	2	2	1	2	200%	100%	50%	100%
	2006 WtQt	Music Perf	Regular	M	1	1	1	1	1	100%	100%	100%	100%
	2011 SmQt	MUS-MIN	TRF-Ugrad	M	1	1	0	1	1	0%	100%	100%	0%
		Math Mast	Online App	F	1	1	0	0	0	0%	0%	0%	0%
		Music Perf	First-Year	M	1	1	1	1	1	100%	100%	100%	100%
	2011 Sum	Math Mast	Research	M	1	1	0	0	0	0%	0%	0%	0%
		Music Perf	First-Year	F	2	2	2	2	2	100%	100%	100%	100%
		Undeclared	Transfer	M	1	1	0	1	1	0%	100%	100%	0%
Grand Total					**14**	**15**	**6**	**9**	**10**	**66%**	**66%**	**90%**	**60%**

Admissions and Enrollment Summary (temporary) report, part 2

X,Y Axis Data Left Graph	***X,Y Axis Data Right Graph***	***Degree Seeking Student Filter***
This graph displays *academic career* data on the x-axis and *application count, enrollment count, admit count, confirm count,* and *applicant count* totals on the y-axis.	This graph displays *gender* data on the x-axis and *application count, enrollment count, admit count, confirm count,* and *applicant count* totals on the y-axis.	Use this filter to narrow results of the Admissions and Enrollment Summary report to degree seeking or non degree seeking students. You can select Y (yes) or N (no).

View by Filter (Left)	***View by Filter (Right)***
Use this filter to view the pivot table results by: • Academic Load • Academic Career • Academic Program • Academic Plan • Application Center • Ethnic Group • Last school attended • Official Residence • Academic Level	Use this filter to view the pivot table results by: • Admit Type • Academic Career • Academic Program • Academic Plan • Application Center • Ethnic Group • Last school attended • Official Residence • Academic Level

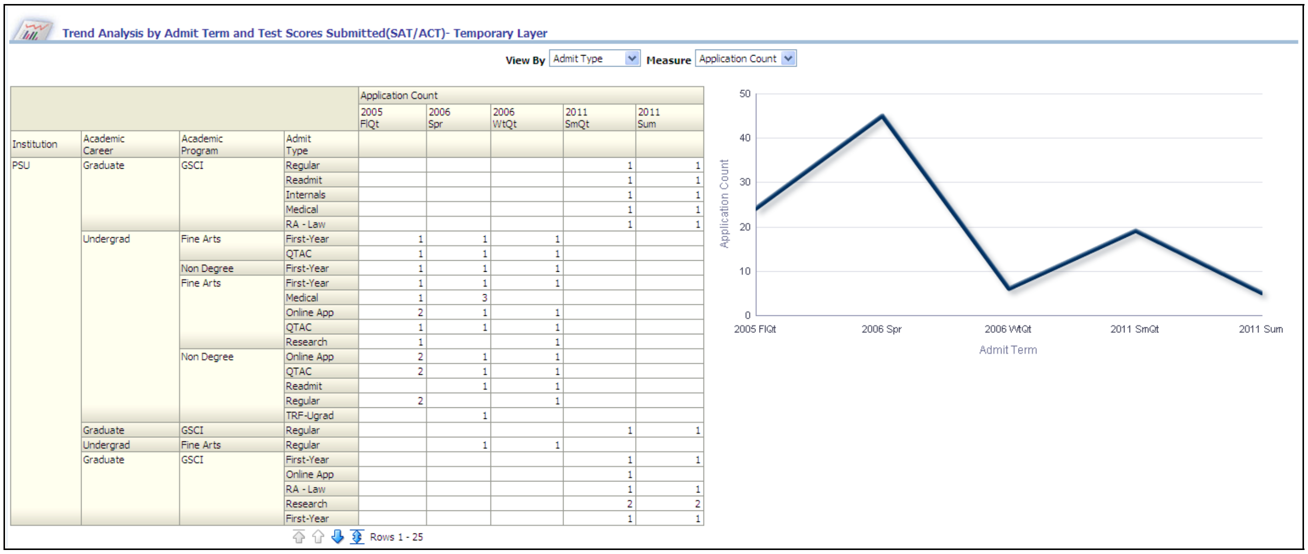
The following table lists the columns and measures used in the Admissions and Enrollment Summary (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
Academic Career	Academic Career (PS_TD_ACAD_CAR) Dimension
Academic Program	Academic Program (PS_TD_ACAD_PROG) Dimension
Academic Plan	Academic Plan (PS_TD_ACAD_PLAN) Dimension
Application Center	Application Center (PS_TD_APPL_CNTR) Dimension
Ethnic Group	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Last school attended	Last School Attended (PS_TD_EXT_ORG) Dimension
Official Residence	Person Attribute (PS_TD_PERSON_ATTR) Dimension
Academic Level	Academic Level (PS_TD_ACAD_LVL) Dimension
Gender	Person (PS_TD_PERSON) Dimension
Degree Seeking Student (DEG_CERT_SEEK_FLG)	Admission Application (PS_TF_ADM_APPL) Fact
Application Count	Admission Application (PS_TF_ADM_APPL) Fact
Enrollment Count	Admission Application (PS_TF_ADM_APPL) Fact
Admit Count	Admission Application (PS_TF_ADM_APPL) Fact

Report Column / Measure Name	***Report Column / Measure Origin***
Confirm Count	Admission Application (PS_TF_ADM_APPL) Fact
Applicant Count	Admission Application (PS_TF_ADM_APPL) Fact

Trend Analysis by Admit Term and Test Scores Submitted (SAT/ACT) Report

Access the Trend Analysis by Admit Term and Test Scores Submitted SAT/ACT (temporary) report, which facilitates trend analysis by comparing admit term with application count, applicant count, enrolled count, confirmed count, or admitted count, and SAT/ACT test scores.



Trend Analysis by Admit Term and Test Scores Submitted SAT/ACT (temporary) report

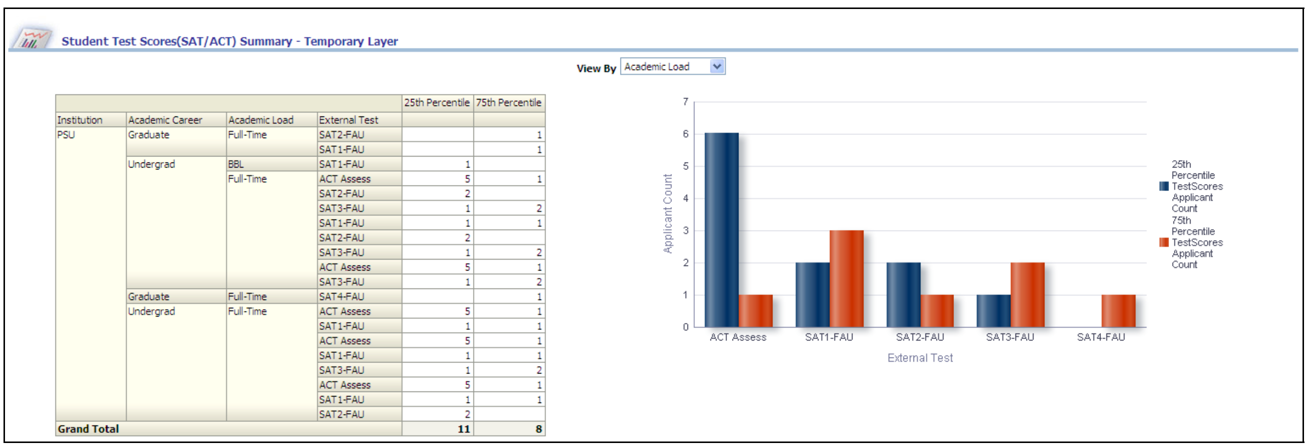
X,Y Axis Data	***View By Filter***	***Measure Filter***
This graph displays *admit term* data on the x-axis and *applicant count* data on the y-axis. The y-axis can also display any of the following measures, depending on your Measure filter selection: • Application Count • Applicant Count • Enrollment Count • Confirm Count • Admit Count	Use this filter to view pivot table results by: • Admit Type • Academic Level	Use this filter to view report results by the following measures: • Application Count • Applicant Count • Enrollment Count • Confirm Count • Admit Count

The following table lists the columns and measures used in the Trend Analysis by Admit Term and Test Scores Submitted SAT/ACT (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Academic Level	Academic Level (PS_TD_ACAD_LVL) Dimension
Institution	Institution (D_INSTITUTION) Dimension
Application Count	Admission Application (PS_TF_ADM_APPL) Fact
Applicant Count	Admission Application (PS_TF_ADM_APPL) Fact
Enrollment Count	Admission Application (PS_TF_ADM_APPL) Fact
Confirm Count	Admission Application (PS_TF_ADM_APPL) Fact
Admit Count	Admission Application (PS_TF_ADM_APPL) Fact

Student Test Scores (SAT/ACT) Summary Report

Access the Student Test Scores (SAT/ACT) Summary (temporary) report, which enables you to analyze student test scores by academic career, admit type, and so forth.



Student Test Scores (SAT/ACT) Summary (temporary) report

X,Y Axis Data	***View by Filter***
This graph displays *external test* (ACT, SAT1, and so forth) and *percentile* data on the x-axis, and *applicant count* data by percentile on the y-axis.	Use this filter to view the pivot table results by: • Academic Load • Admit Type • Academic Level • Campus • Application Center

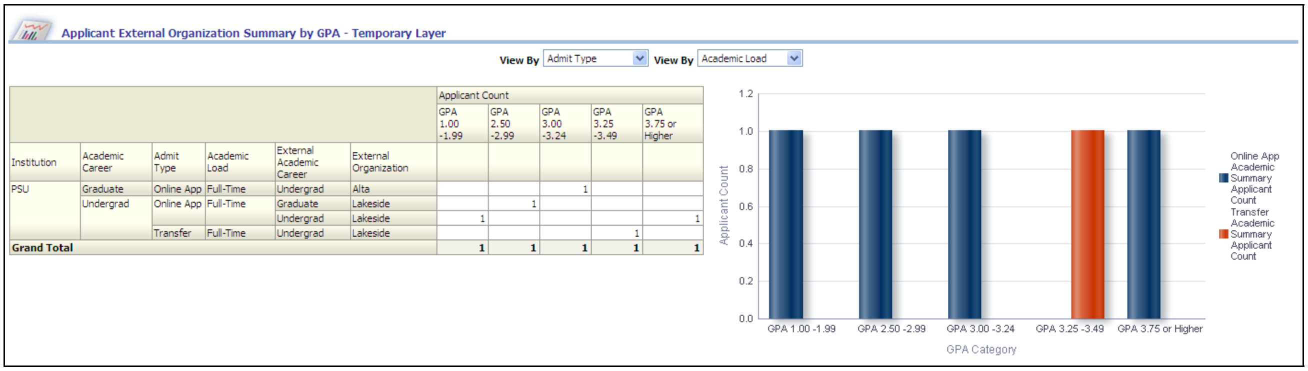
The following table lists the columns and measures used in the Student Test Scores (SAT/ACT) Summary (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Academic Level	Academic Level (PS_TD_ACAD_LVL) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Application Center	Application Center (PS_TD_APPL_CNTR) Dimension
External Test	External Test Component (PS_TD_EX_TST_CMPNT) Dimension
Applicant Count	Student Test Scores (PS_TF_STU_TSTSCORE) Fact
Percentile	Score Percentile columns are located in the Student Test Scores (PS_TF_STU_TSTSCORE) Fact. Case When "Enterprise Warehouse"."Fact Student Admissions (Temporary Layer)"."Score Percentile" <= 25 Then '25th Percentile' Else '75th Percentile' End

Applicant External Organization Summary by GPA Report

Access the Applicant External Organization Summary by GPA (temporary) report, which enables you to analyze applicant external GPA by academic career, external organization, and so forth.

This report displays only the students for whom you collected external GPA information.



						Applicant Count				
						GPA 1.00 -1.99	GPA 2.50 -2.99	GPA 3.00 -3.24	GPA 3.25 -3.49	GPA 3.75 or Higher
Institution	Academic Career	Admit Type	Academic Load	External Academic Career	External Organization					
PSU	Graduate	Online App	Full-Time	Undergrad	Alta			1		
	Undergrad	Online App	Full-Time	Graduate	Lakeside		1			
				Undergrad	Lakeside	1				1
		Transfer	Full-Time	Undergrad	Lakeside				1	
Grand Total						1	1	1	1	1

Applicant External Organization Summary by GPA (temporary) report

X,Y Axis Data	***View by Filter (Left)***	***View by Filter (Right)***
This graph displays *GPA category* data on the x-axis and *applicant count* data by *admit type* and *academic load* on the y-axis. The y-axis can also plot any of the following dimensions, depending on the second (right) View By filter selection: • Academic Load • Academic Level • Campus • Application Center • Academic Program	Use this filter to view pivot table and graph results by: • Admit Type • Academic Level • Campus • Application Center • Academic Program	Use this filter to view the pivot table results by: • Academic Load • Academic Level • Campus • Application Center • Academic Program

The following table lists the columns and measures used in the Applicant External Organization Summary by GPA (temporary) report.

Report Column / Measure Name	***Report Column / Measure Origin***
Admit Type	Admit Type (PS_TD_ADMIT_TYPE) Dimension
Academic Level	Academic Level (PS_TD_ACAD_LVL) Dimension
Campus	Campus (PS_TD_CAMPUS) Dimension
Application Center	Application Center (PS_TD_APPL_CNTR) Dimension
Academic Program	Academic Program (PS_TD_ACAD_PROG) Dimension
Academic Load	Academic Load (PS_TD_ACAD_LOAD) Dimension
External Organization	External Organization (PS_TD_EXT_ORG) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
External Academic Career	Academic Career (PS_TD_ACAD_CAR) Dimension
GPA Category	External Academic Summary (PS_TF_EXT_ACAD_SUM) Fact
Applicant Count	External Academic Summary (PS_TF_EXT_ACAD_SUM) Fact

Chapter 6

Working with the Delivered OBIEE Dashboard for the Customer Relationship Management (CRM) Warehouse

This chapter provides prerequisites, an overview of the CRM Support Cases dashboard, and discusses the Support Cases page reports.

Prerequisites

Before you implement the new Fusion Intelligence reports, you must implement:

- PeopleSoft CRM
- PeopleSoft EPM CRM Warehouse

Understanding the Dashboard for the CRM Warehouse

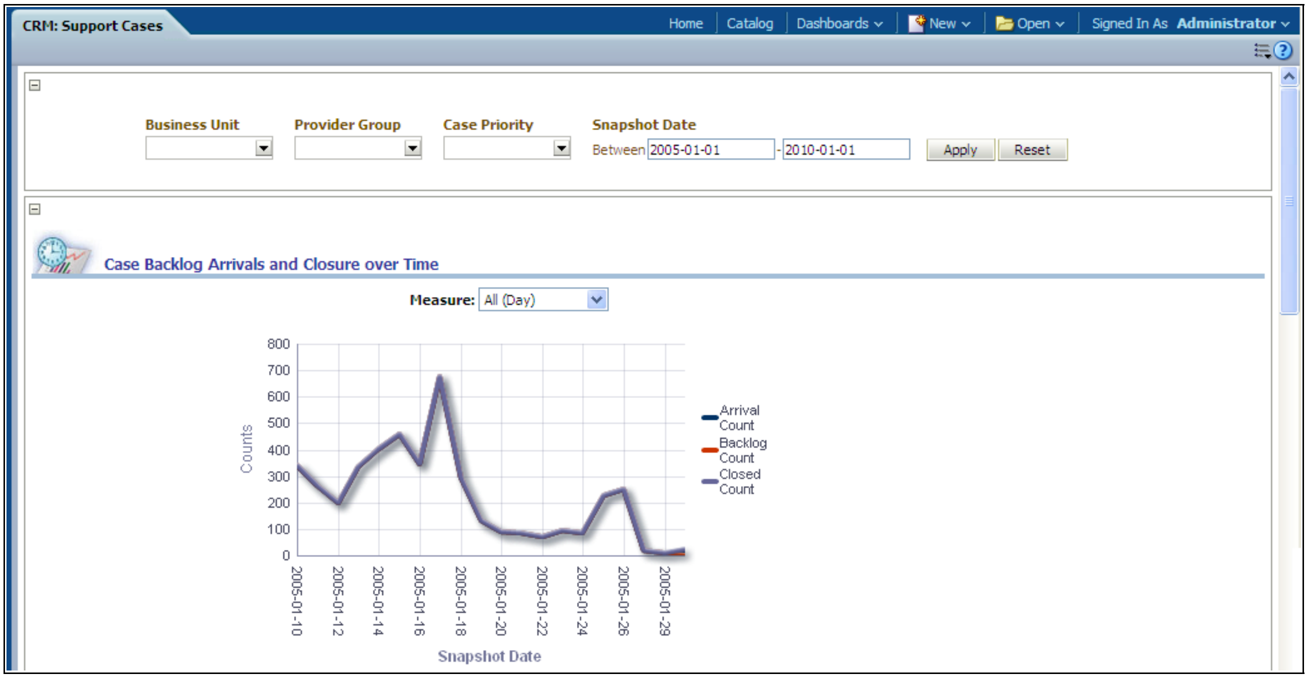
CRM for Higher Education customers using PeopleSoft CRM Support to manage their call centers will benefit from the CRM: Support Cases Dashboard.

The CRM Support Cases Dashboard includes reports that track:

- Case arrivals, backlog, and closure over time.
- Case resolution based on SLA requirements.
- Average time to close cases.
- First call resolution.

Using the Support Cases Page

Access the Support Cases page (Dashboards, CRM Reports, CRM: Support Cases).

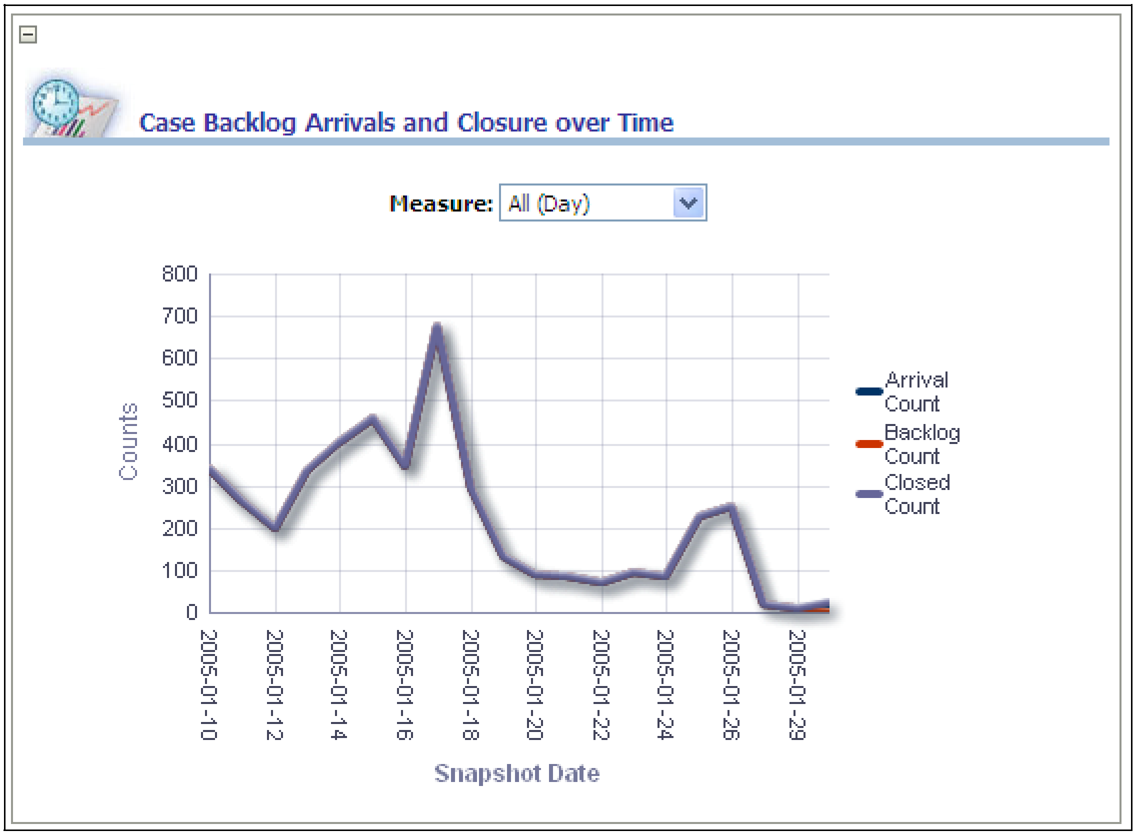


CRM: Support Cases Dashboard

Usage	***Reports***	***Dashboard Prompt***
Provides analysis of support cases over a period of time using various measures.	This page is comprised of the following reports: • Case Backlog Arrivals and Closure over Time • SLA Met vs. SLA Missed • Average Time to Close Cases • First Call Resolution	Use the Support Cases page prompt to filter page results by: • Business Unit • Provider Group • CasePriority • Snapshot Date

Case Backlog Arrivals and Closure over Time Report

Access the Case Backlog Arrivals and Closure over Time Report (Dashboards, CRM: Support Cases, Case Backlog Arrivals and Closure Over Time).



Case Backlog Arrivals and Closure over Time report

This report allows managers to monitor the case arrival, case closure, and case backlog over time, as well as helping managers to identify the Provider Groups with the highest backlog, arrivals and closures and their priority distribution in the given business units.

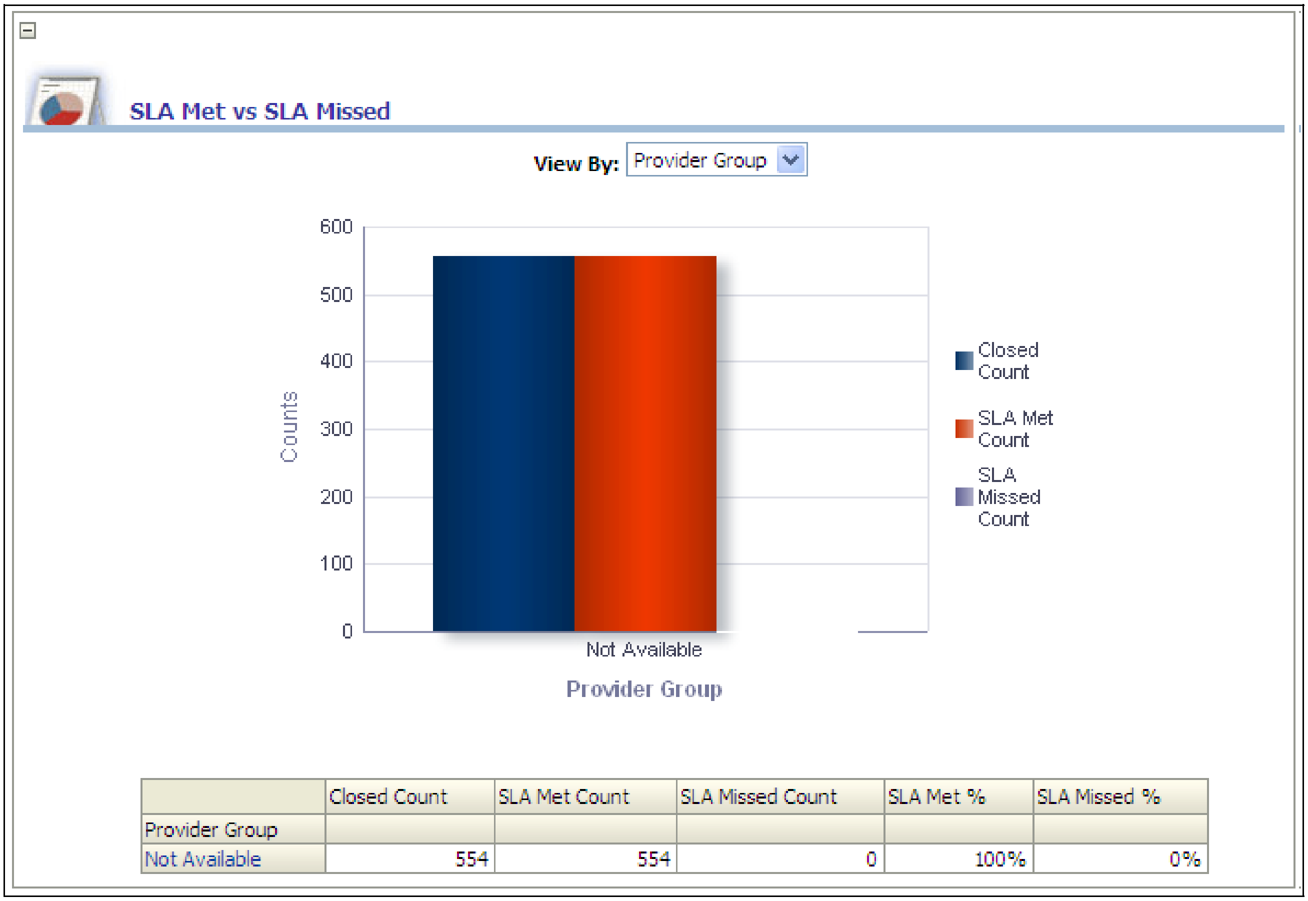
X,Y Axis Data	***Measure Filter***
The Case Backlog Arrivals vs. Case Closures over Time graph displays *Snapshot Date* on the x-axis and *Counts* (Arrival Count, Backlog Count, and Closed Count) on the y-axis. The actual counts displayed are determined by the selection in the Measure filter.	Use this filter to view report results by the following measures: • All (Day) (default value) • All (Year) • Arrivals (Year) • Backlog (Year) • Closed (Year) • All (Month) • Arrivals (Month) • Backlog (Month) • Closed (Month) • All (Week) • Arrivals (Week) • Backlog (Week) • Closed (Week) • Arrivals (Day) • Backlog (Day) • Closed (Day)

The following table lists the columns and measures used in the Case Backlog Arrivals and Closure over Time report.

Report Column / Measure Name	***Report Column / Measure Origin***
Backlog Count	Case Trend (F_CASE_TR) Fact Number of open cases + Number of cases on hold
Closed Count	Case Trend (F_CASE_TR) Fact Number of closed cases + Number of cancelled cases
Arrival Count	Case Trend (F_CASE_TR) Fact

SLA Met vs. SLA Missed Report

Access the SLA Met vs. SLA Missed report (Dashboard, CRM: Support Cases, SLA Met vs. SLA Missed).



SLA Met vs. SLA Missed report

This report allows managers to monitor overall compliance to Service Level Agreements (SLAs). This metric provides insight into how provider groups and agents are measuring up for the SLA restore time goals.

X,Y Axis Data	***View By Filter***
The SLA Met vs. SLA Missed graph displays *Provider Group* on the x-axis and *Closed Count, SLA Met Count,* and *SLA Missed Count* on the y-axis. The x-axis can also display *Priority* or *Business Unit,* depending on your View By filter selection.	Use this filter to view report results by the following program types: • Provider Group (default) • Priority • Business Unit

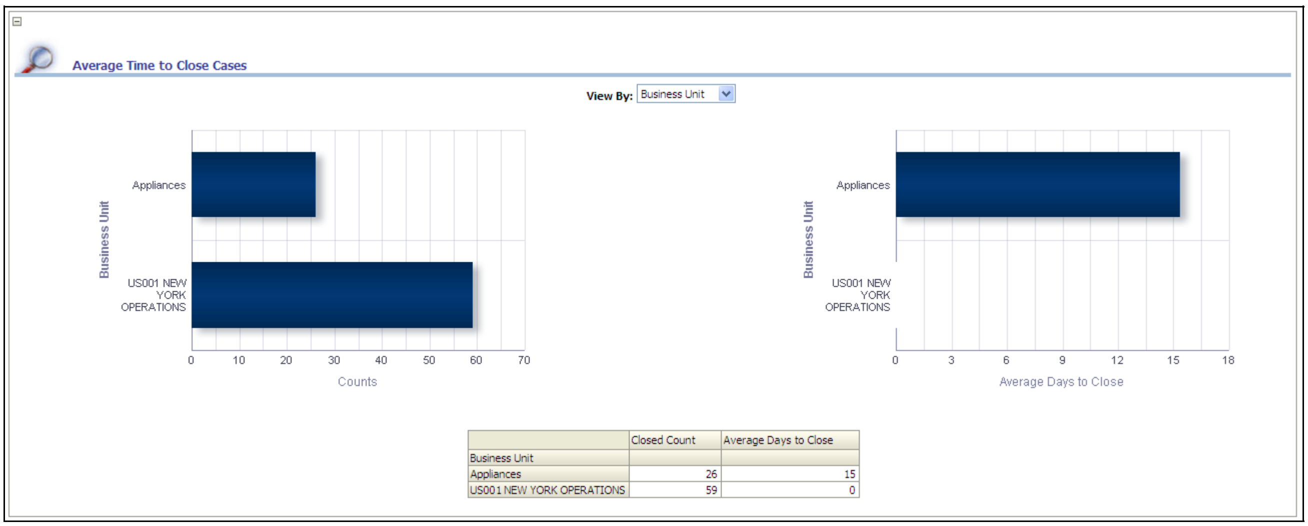
The following table lists the columns and measures used in the SLA Met vs. SLA Missed report.

Report Column / Measure Name	***Report Column / Measure Origin***
Closed Count	Case Trend (F_CASE_TR) Fact Number of closed cases + Number of cancelled cases
SLA Met	Case Trend (F_CASE_TR) Fact

Report Column / Measure Name	***Report Column / Measure Origin***
SLA Missed	Case Trend (F_CASE_TR) Fact
SLA Met %	(SLA Met / Cases Closed) * 100
SLA Missed %	(SLA Missed / Cases Closed) * 100
Provider Group	Provider Group (D_PROVIDER_GRP) Dimension
Priority	Case Priority (D_CASE_PRIORITY) Dimension
Business Unit	Business Unit (D_BUSINESS_UNIT) Dimension

Average Time to Close Cases Report

Access the Average Time to Close Cases report (Dashboard, CRM: Support Cases, Average Time to Close Cases).



Average Time to Close Cases report

This report displays the average number of days taken to close support cases by Provider Group, Agent, Priority and Business Unit.

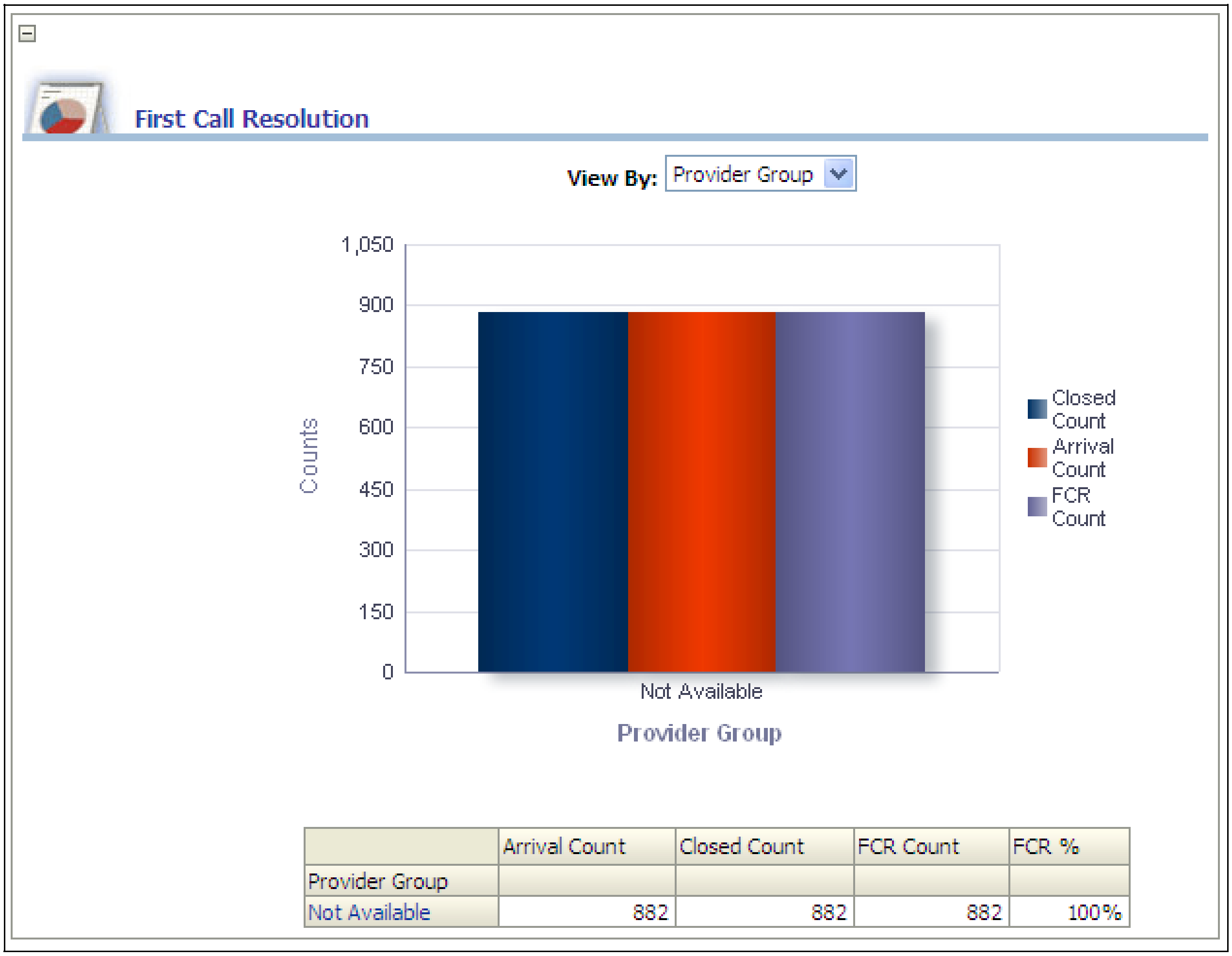
X,Y Axis Data for Bar Chart 1	***X,Y Axis Data for Bar Chart 2***	***View By Filter***
The first graph displays *Counts* on the x-axis, and *Business Unit* on the y-axis. The x-axis can also display *Priority* or *Business Unit,* depending on your View By filter selection.	The second graph displays *Average Days to Close* on the x-axis, and *Business Unit* on the y-axis. The x-axis can also display *Priority* or *Business Unit,* depending on your View By filter selection.	Use this filter to view report results by the following program types: • Provider Group (default) • Priority • Business Unit

The following table lists the columns and measures used in the Average Time to Close Cases report.

Report Column / Measure Name	***Report Column / Measure Origin***
Provider Group	Provider Group (D_PROVIDER_GRP) Dimension
Priority	Case Priority (D_CASE_PRIORITY) Dimension
Business Unit	Business Unit (D_BUSINESS_UNIT) Dimension
Closed Count	Case Trend (F_CASE_TR) Fact Number of closed cases + Number of cancelled cases
Average Days to Close	(Total number of days to close N cases) / N (where N is the number of closed cases)

First Call Resolution Report

Access the First Call Resolution report (Dashboard, CRM: Support Cases, First Call Resolution).



First Call Resolution report

This report allows users to analyze the first call resolution rates for given Business Units, Provider Groups and their Agents, as well as helping managers understand if the first call resolution targets are being met for a given time period and what Provider Groups and Agents have the highest and lowest first call resolution rates.

X,Y Axis Data	***View By Filter***
The First Call Resolution graph displays *Provider Group* on the x-axis, and *Closed Count, Arrival Count,* and *FCR Count* on the y-axis. The x-axis can also display *Priority* or *Business Unit,* depending on your View By filter selection.	Use this filter to view report results by the following program types: • Provider Group (default) • Priority • Business Unit

The following table lists the columns and measures used in the First Call Resolution report.

Report Column / Measure Name	***Report Column / Measure Origin***
Provider Group	Provider Group (D_PROVIDER_GRP) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Priority	Case Priority (D_CASE_PRIORITY) Dimension
Business Unit	Business Unit (D_BUSINESS_UNIT) Dimension
Closed Count	Case Trend (F_CASE_TR) Fact Number of closed cases + Number of cancelled cases
Arrival Count	Case Trend (F_CASE_TR) Fact
FCR Count	Case Trend (F_CASE_TR) Fact
FCR %	(FCR Count / (Closed Case count + Cancelled case count)) * 100

Chapter 7

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
- Grants Dashboard

Prerequisites

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

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

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 and Profitability
- Payables
- Receivables

Grants Dashboard

The Grants dashboard enables you to perform detailed analysis of the activities associated with grant proposals, awards, and award funding. The Grants dashboard is designed for director-level staff members who manage the overall grants process and oversee principle investigators and grant proposal writers.

The Grants dashboard provides functionality related to the following analytic subject areas:

- Pre award (proposal) analysis
- Awards analysis
- Award activities analysis

Using the Grants dashboard you can:

- Determine your success rate and overall ability to obtain grant funding.
- Analyze the activity associated with budgets, expenditures, and sponsor billing for recovering costs. Expenditures includes payroll costs, benefit costs, employee expenses, equipment and supplies that are purchased, services that are contracted out to other entities and other miscellaneous spending that occurs.
- Evaluate performance of the staff responsible for investigating and submitting proposals, and managing award funds.

Pre Award (Proposal) Analysis

The pre award, or proposal, subject area supports analysis of proposal success rate, proposal processing, and helps answer:

- What outstanding proposals do I have and how much funding do they represent?
- What are the funding requests by department and/or principal investigator?
- What is the processing time from submission to funding?
- What are the budgets defined for my research proposals?
- What portion of the proposed budgets are direct costs versus indirect costs?
- What F&A amounts are associated with my proposal budgets?
- Which proposals include cost-sharing budgets with other institutions?
- What is the total amount of proposals that were rejected versus funded?
- What amounts were budgeted vs. awarded vs. proposed?

Awards Analysis

The Awards subject area supports analysis of grant awards, award trends, spending and revenue activity, and helps answer:

- How do this year's awards compare to last year's awards?

- Which project budgets, billing, receivables, and expenditures relate to the award?
- How successful are the principal investigators in getting grants awarded?
- What has been awarded, to date, for a particular research program?
- What sponsor awards have funded a particular research program?

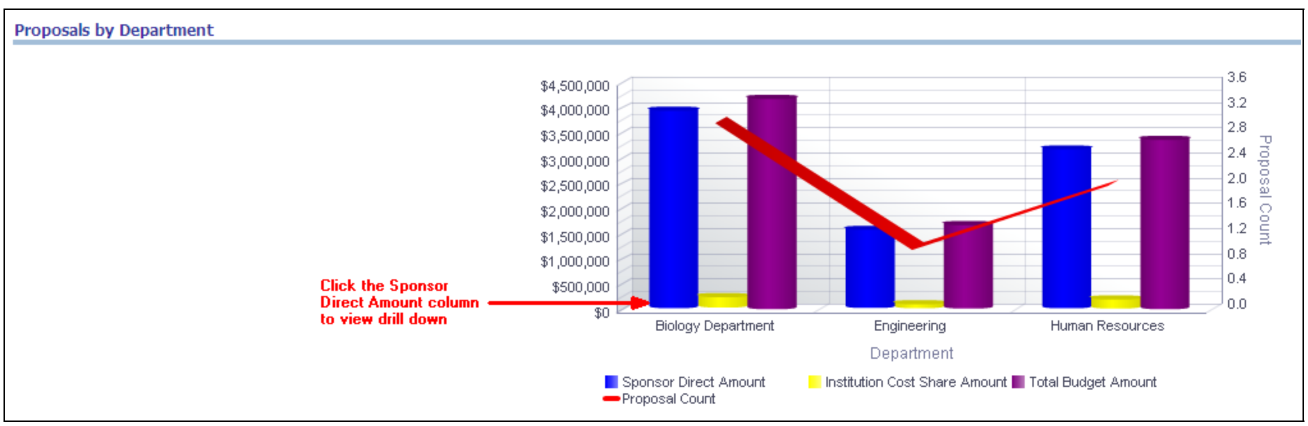
Award Activities Analysis

The Award Activities subject area supports analysis of the funding, billing, and receiving associated with an award, and helps answer:

- What are the award funds spent to date?
- What are the budget amounts and actual expenditures for the fiscal or budget period?
- What is the breakdown of actual expenses by analysis type and group?
- What is the breakdown of actual expenses by department?

Reviewing Drill Down Information in Grants Reports Charts and Graphs

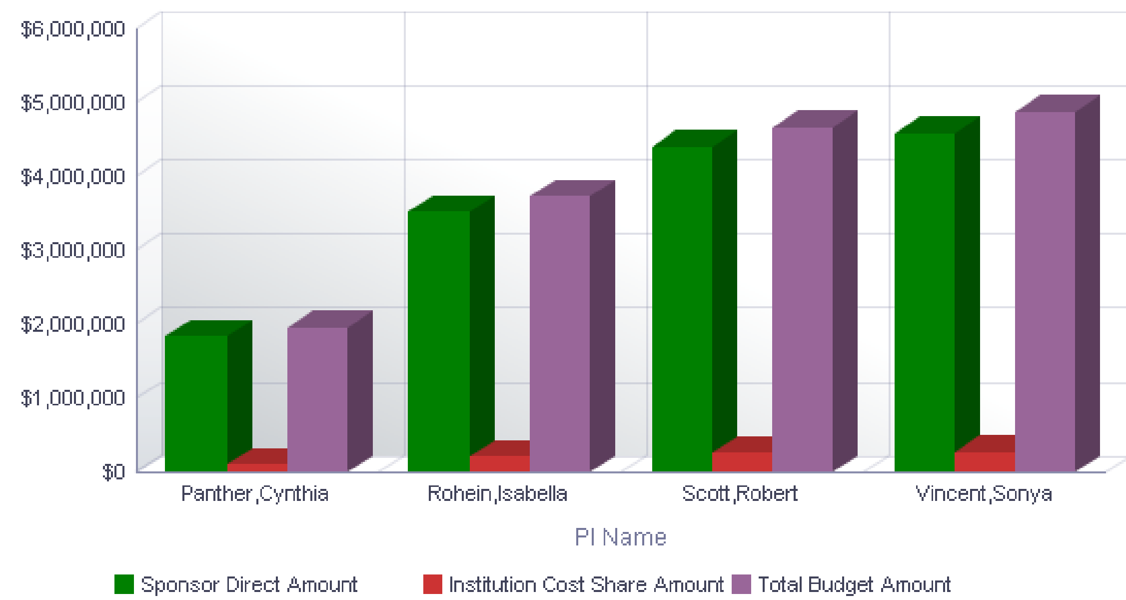
Some Grants reports have interactive charts and graphs that enable you to review drill down information for a particular dimension. In these reports you can select a specific dimension from the chart and review a new report based on the specific drill down information for that dimension. For example, in the Proposals by Department report you can click the Sponsor Direct Amount column for the Biology Department to review related drill down information:



Drilling on Sponsor Direct Amount for the Biology Department

FMS:Grants

Detail - Proposals by PI



Biology Department

	Sponsor Direct Amount	Institution Cost Share Amount	Total Budget Amount	Proposal Count
PI Name				
Panther,Cynthia	$1,312,500	$78,750	$1,391,250	1
Rohein,Isabella	$3,517,500	$211,050	$3,728,550	4
Scott,Robert	$4,387,689	$263,261	$4,650,950	5
Vincent,Sonya	$462,000	$27,720	$489,720	1
Grand Total	**$1,312,500**	**$78,750**	**$1,391,250**	**1**

Return - Create Bookmark Link

Viewing the drill down report for Sponsor Direct Amount for the Biology Department

The following Grants reports enable you to review drill down information:

- Proposal Success Rate
- Proposal Success Rate by PI
- Proposals by Department

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:

Guided Navigation Name	***Threshold Description***	***Guided Navigation Target Page***
Revenue Alert	Revenue is at risk of missing the budget or forecast, based on this calculation: (revenue ÷ budget ≤ 0.95) and ((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: (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: (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.

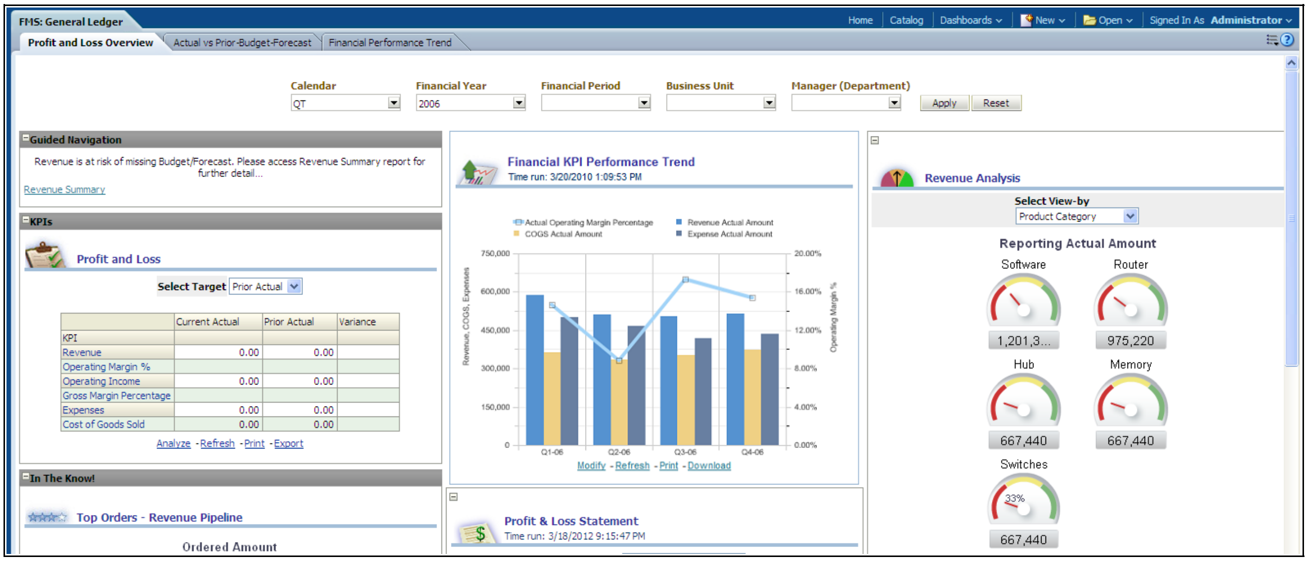
Delivered Security Groups

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 (Dashboards, FMS Reports, FMS: General Ledger, Profit and Loss Overview).

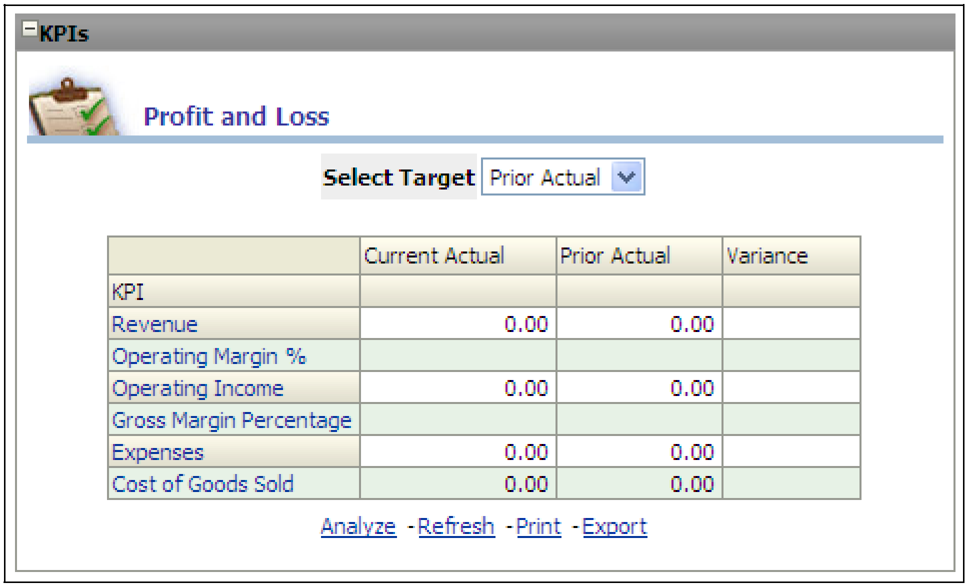


Profit and Loss Overview page

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.	This page is comprised of the following reports: • KPIs - Profit and Loss report • Financial KPI Performance Trend report • Revenue Analysis report • Top Orders - Revenue Pipeline report • Profit & Loss Statement report	Use the Profit and Loss Overview page prompt to filter page results by: • Calendar • Financial Year • Financial Period • Business Unit • Manager (Department)

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.



	Current Actual	Prior Actual	Variance
KPI			
Revenue	0.00	0.00	
Operating Margin %			
Operating Income	0.00	0.00	
Gross Margin Percentage			
Expenses	0.00	0.00	
Cost of Goods Sold	0.00	0.00	

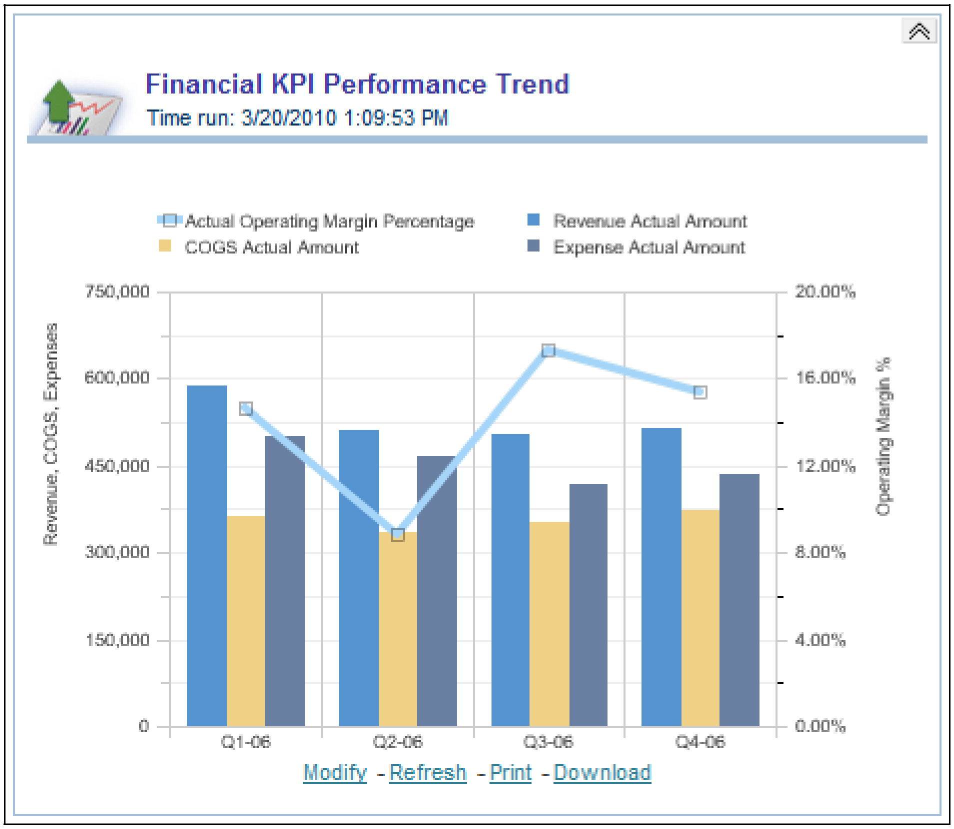
KPIs - Profit and Loss report

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.

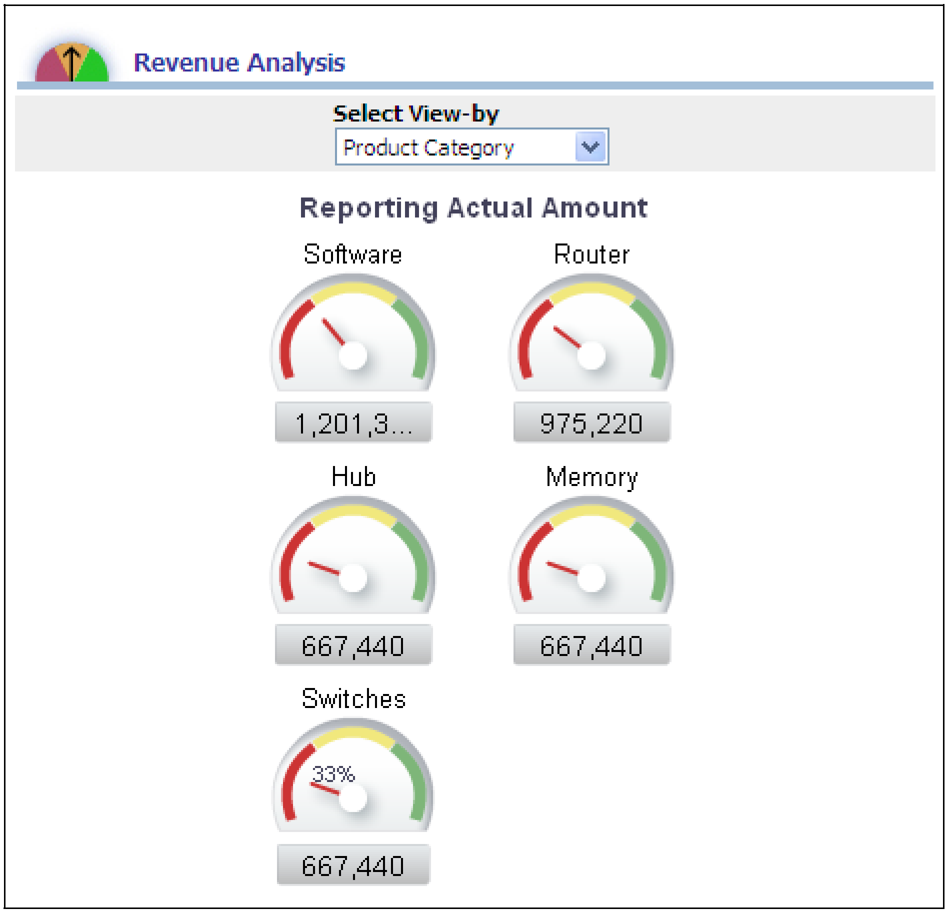


Financial KPI Performance Trend report

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.



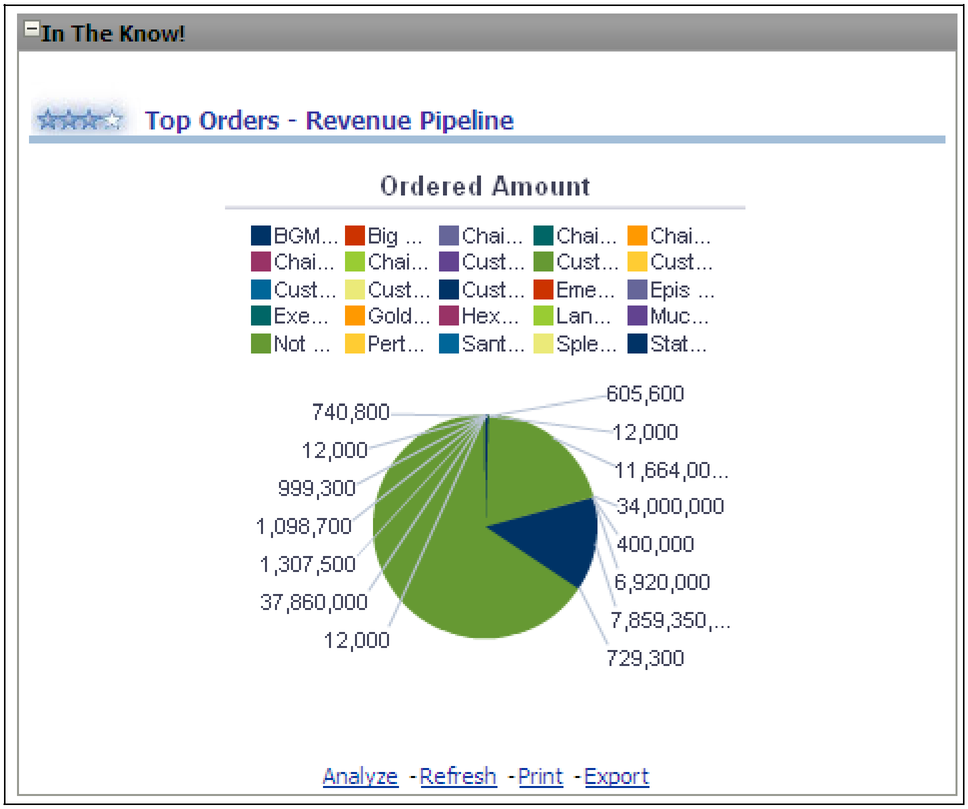
Revenue Analysis report

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

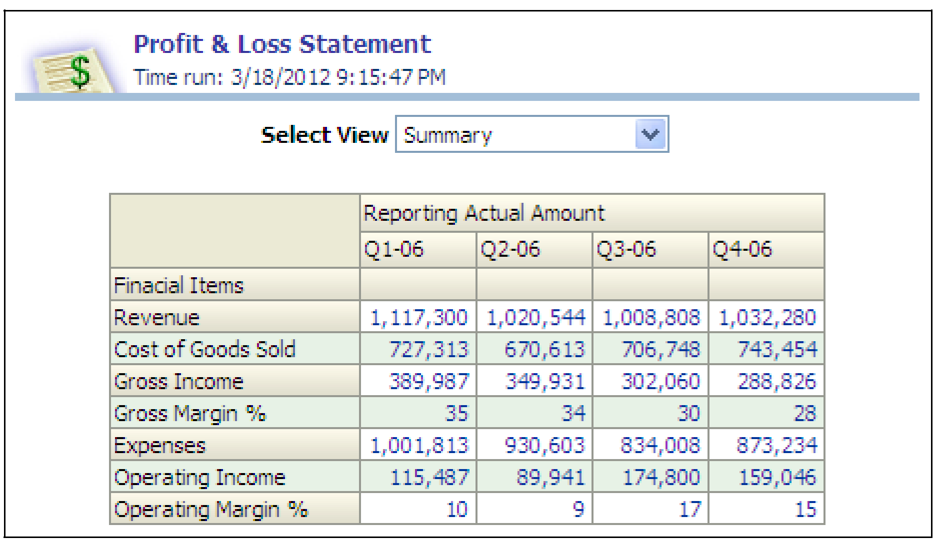
Access the Top Orders - Revenue Pipeline report, which enables you to analyze revenue metrics by customer.



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.



Profit & Loss Statement

Time run: 3/18/2012 9:15:47 PM

Select View: Summary

	Reporting Actual Amount			
	Q1-06	Q2-06	Q3-06	Q4-06
Finacial Items				
Revenue	1,117,300	1,020,544	1,008,808	1,032,280
Cost of Goods Sold	727,313	670,613	706,748	743,454
Gross Income	389,987	349,931	302,060	288,826
Gross Margin %	35	34	30	28
Expenses	1,001,813	930,603	834,008	873,234
Operating Income	115,487	89,941	174,800	159,046
Operating Margin %	10	9	17	15

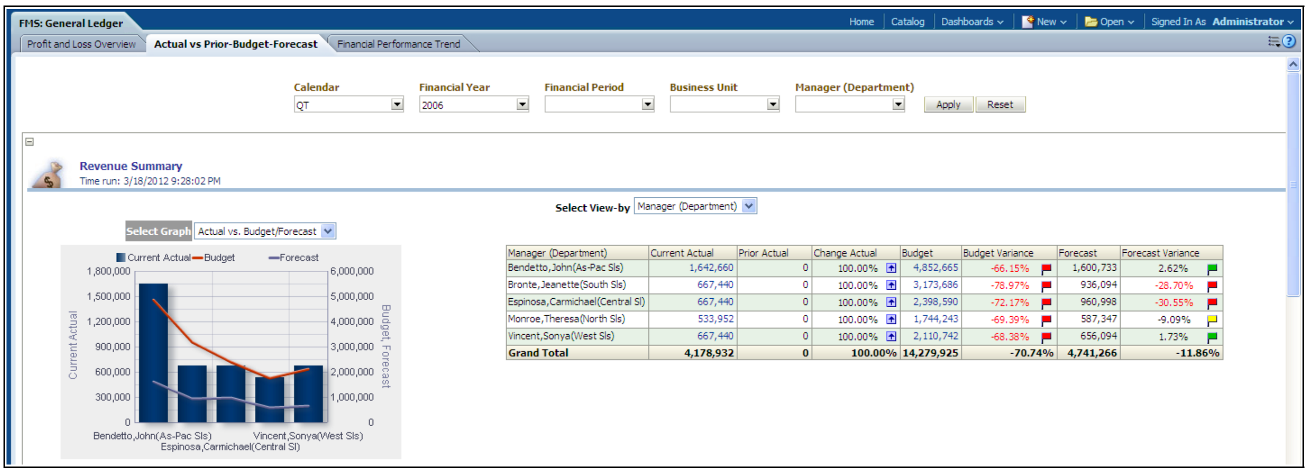
v

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 (Dashboards, FMS Reports, FMS: General Ledger, Actual vs Prior-Budget-Forecast).

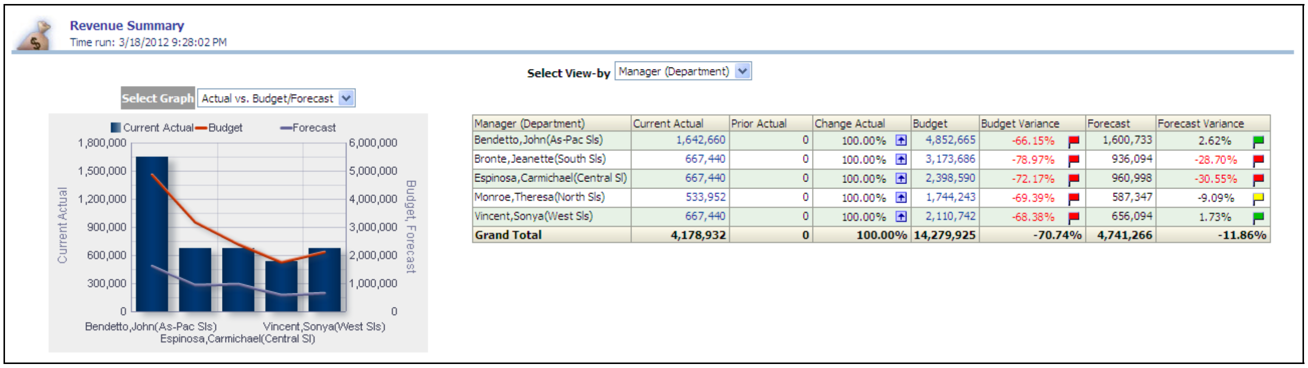


Actual vs Prior-Budget-Forecast page

Usage	***Reports***	***Dashboard Prompt***
Provides you with a detailed analysis of revenue, expense, and cost of goods sold metrics for your organization.	This page is comprised of the following reports: • Revenue Summary report • COGS Summary report • Expense Summary report	Use the Actual vs Prior-Budget-Forecast page prompt to filter page results by: • Calendar • Financial Year • Financial Period • Business Unit • Manager (Department)

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.



Manager (Department)	Current Actual	Prior Actual	Change Actual	Budget	Budget Variance	Forecast	Forecast Variance
Bendetto,John(As-Pac Sls)	1,642,660	0	100.00%	4,852,665	-66.15%	1,600,733	2.62%
Bronte,Jeanette(South Sls)	667,440	0	100.00%	3,173,686	-78.97%	936,094	-28.70%
Espinosa,Carmichael(Central Sl)	667,440	0	100.00%	2,398,590	-72.17%	960,998	-30.55%
Monroe,Theresa(North Sls)	533,952	0	100.00%	1,744,243	-69.39%	587,347	-9.09%
Vincent,Sonya(West Sls)	667,440	0	100.00%	2,110,742	-68.38%	656,094	1.73%
Grand Total	**4,178,932**	**0**	**100.00%**	**14,279,925**	**-70.74%**	**4,741,266**	**-11.86%**

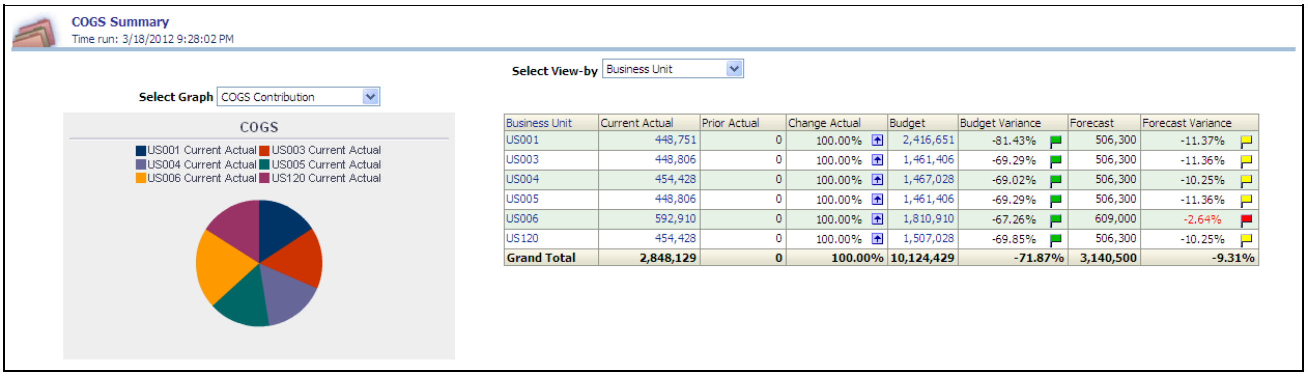
Revenue Summary report

Select Graph - Actual vs. Budget/Forecast (Default)	***Select Graph - Revenue Contribution***
The Actual vs. Budget/Forecast graph displays *Manager (Department)* data on the x-axis and *Current Actual (revenue)* and *Budget*, *Forecast (revenue)* data on the y-axis.	The Revenue Contribution pie chart displays revenue data grouped by *Manager (Department).*

Select Graph - Variance Analysis	***Select View By***
The Variance Analysis line graph displays *Manager (Department)* data on the x-axis and *(Revenue) Variance Percentage* data on the y-axis.	Use this filter to view results in the table by: • *Business Unit* • *Manager (Department)* (default) • *Account Description*

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.



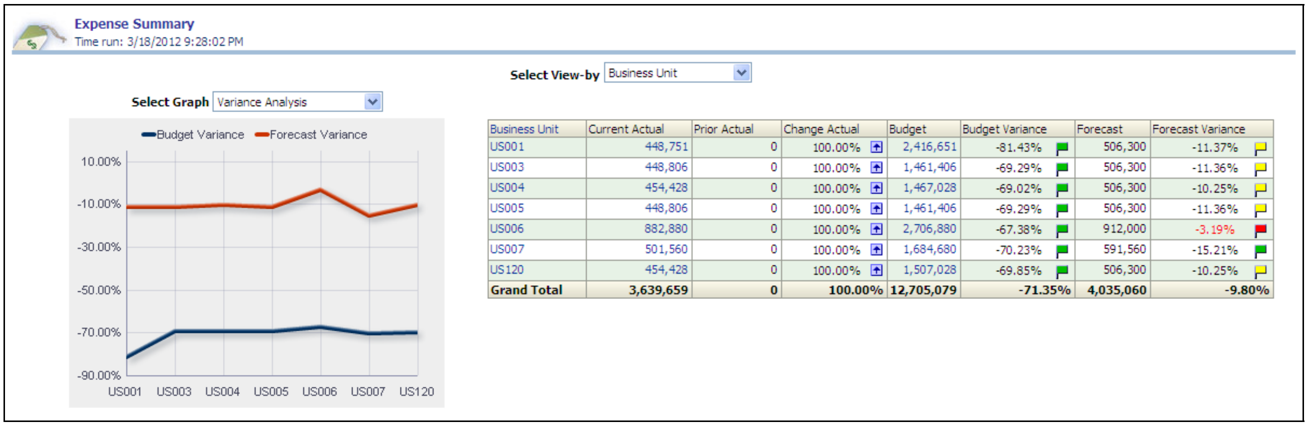
COGS (Cost of Goods Sold) Summary report

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

Select Graph - Variance Analysis	***Select View By***
The Variance Analysis line graph displays *Business Unit* data on the x-axis and *COGS Variance Percentage* data on the y-axis.	Use this filter to view results in the table by: • *Business Unit* • *Manager (Department)* (default) • *Account Description*

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.



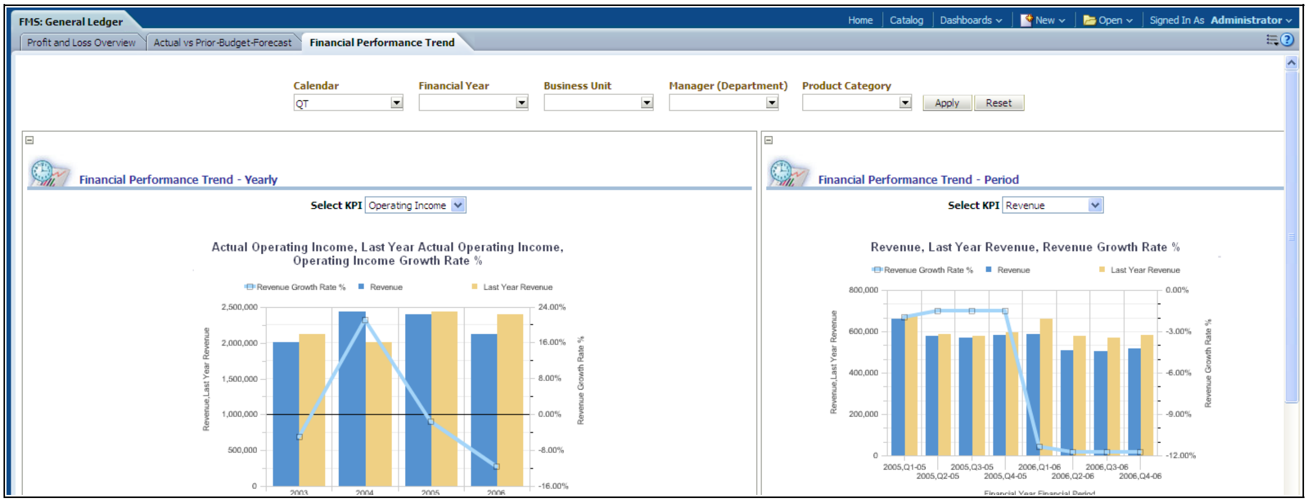
Expense Summary report

Select Graph - Variance Analysis	***Select Graph - Expense Contribution (Default)***
The Variance Analysis line graph displays *Business Unit* data on the x-axis and *Expense Variance Percentage* data on the y-axis.	The Expense Contribution pie chart displays expense data grouped by *Business Unit.*

Select Graph - Actual vs. Budget/Forecast	***Select View By Filter***
The Actual vs. Budget/Forecast graph displays *Business Unit* data on the x-axis and *Current Actual (expense)* and *Budget*, *Forecast (expense)* data on the y-axis.	Use this filter to view results in the table by: • *Business Unit* • *Manager (Department)* (default) • *Account Description*

Using the General Ledger Dashboard - Financial Performance Trend Page

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

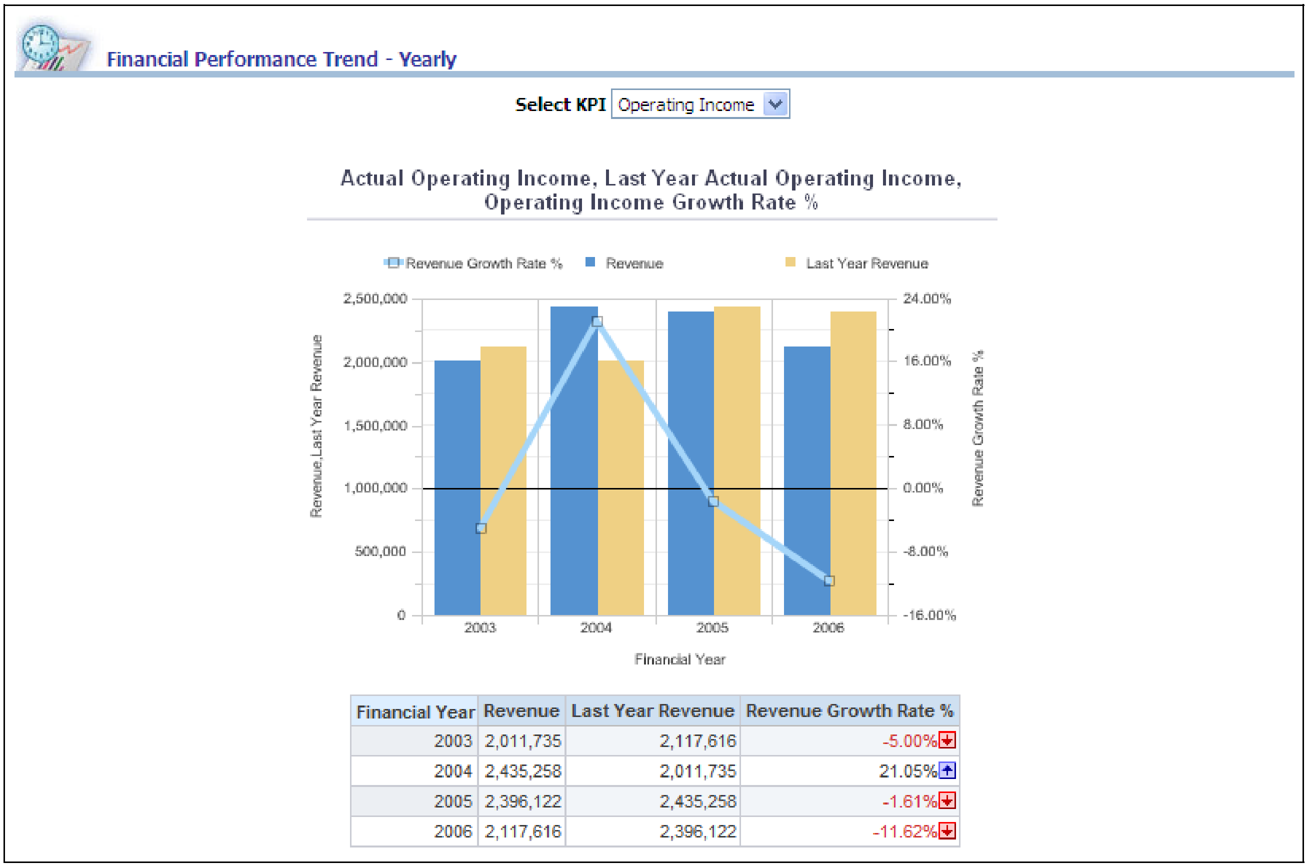


Financial Performance Trend page

Usage	*Reports*	*Dashboard Prompt*
Provides you with an overview of your organization's financial performance trend, by year and period.	This page is comprised of the following reports: • Financial Performance Trend - Yearly report • Financial Performance Trend - Period report	Use the Financial Performance Trend page prompt to filter page results by: • Calendar • Financial Year • Business Unit • Manager (Department) • Product Category

Financial Performance Trend - Yearly Report

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



Financial Year	Revenue	Last Year Revenue	Revenue Growth Rate %
2003	2,011,735	2,117,616	-5.00%
2004	2,435,258	2,011,735	21.05%
2005	2,396,122	2,435,258	-1.61%
2006	2,117,616	2,396,122	-11.62%

Financial Performance Trend - Yearly report

Financial Performance Trend - Yearly report

Select KPI - Revenue	***Select KPI - Expenses***
The KPI - Revenue graph displays *Financial Year* data on the x-axis and *Revenue, Last Year Revenue* and *Revenue Growth Rate %* data on the y-axis.	The KPI - Expenses graph displays *Financial Year* data on the x-axis and *Expenses, Last Year Expenses* and *Expense Growth Rate %* data on the y-axis.

Select KPI - COGS	***Select KPI - Operating Income***
The KPI - COGS graph displays *Financial Year* data on the x-axis and *COGS Actual Amount, Last Year COGS Actual Amount* and *COGS Growth Rate %* data on the y-axis.	The KPI - Operating Income graph displays *Financial Year* data on the x-axis and *Operating Income Actual Amount, Last Year Operating Income Actual Amount* and *Operating Income Growth Rate %* 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 Period	Revenue	Last Year Revenue	Revenue Growth Rate %
Q1-05	661,680	674,820	-1.95%
Q2-05	578,147	586,813	-1.48%
Q3-05	571,530	580,065	-1.47%
Q4-05	584,764	593,561	-1.48%
Q1-06	586,800	661,680	-11.32%
Q2-06	510,272	578,147	-11.74%
Q3-06	504,404	571,530	-11.75%
Q4-06	516,140	584,764	-11.74%

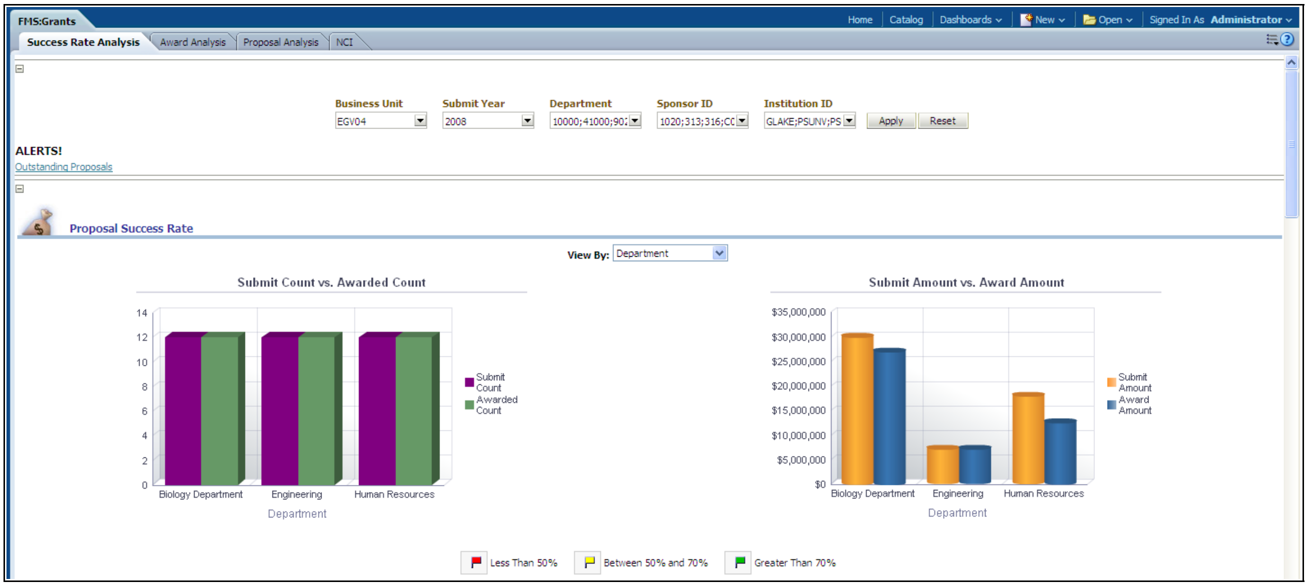
Financial Performance Trend - Period report

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

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

Using the Grants Dashboard - Success Rate Analysis Page

Access the Success Rate Analysis page (Dashboards, FMS Reports, FMS: Grants, Success Rate Analysis).



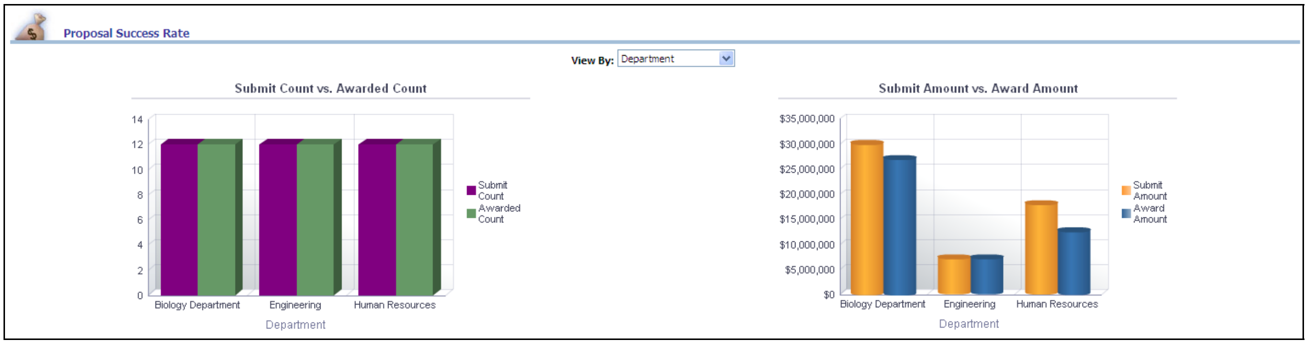
Success Rate Analysis page

Usage	***Reports***
Provides you with an overview of proposal success rate, outstanding proposals, and success rate trends.	This page is comprised of the following reports: • Proposal Success Rate • Proposal Success Rate by PI • Outstanding Proposals by Sponsor • Success Rate Trend

Dashboard Prompt	***Alerts***
Use the Success Rate Analysis page prompt to filter page results by: • Business Unit • Submit Year • Department • Sponsor ID • Institution ID	Displays a link to any proposal that is currently outstanding.

Proposal Success Rate Report

Access the Proposal Success Rate report, which enables you to analyze awarded proposals and amounts against total proposals submitted and amounts requested.



Proposal Success Rate report, part 1

Less Than 50% Between 50% and 70% Greater Than 70%

	Submit Count	Awarded Count	Success Rate Count %	Submit Amount	Award Amount	Realized %
Department						
Biology Department	12	12	100%	$30,000,000	$27,000,000	90%
Engineering	12	12	100%	$7,200,000	$7,200,000	100%
Human Resources	12	12	100%	$18,000,000	$12,600,000	70%
Grand Total	**504**	**348**	**0%**	**$467,325,000**	**$316,908,000**	**68%**

Proposal Success Rate report, part 2

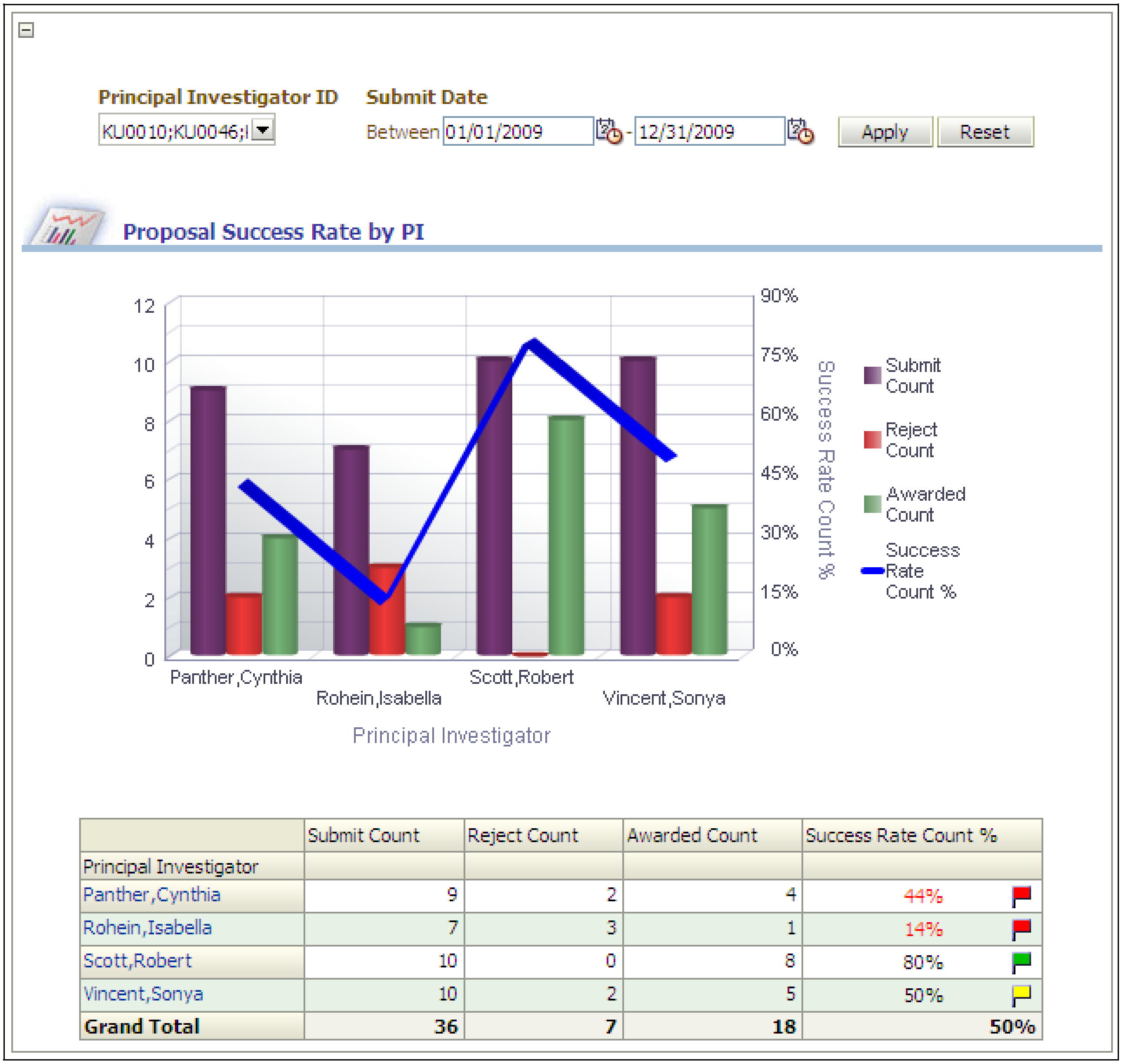
X,Y Axis Data ***Submit Count vs. Awarded Count***	***X,Y Axis Data*** ***Submit Amount vs. Award Amount***	***View By Filter***
The Submit Count vs. Awarded Count graph displays *department* data on the x-axis and *submit count* and *award count* data on the y-axis. The x-axis can also plot any of the following dimensions, depending on your View By filter selection: • Institution • Principal Investigator • Sponsor	The Submit Amount vs. Award Amount graph displays department data on the x-axis and submit amount and award amount data on the y-axis. The x-axis can also plot any of the following dimensions, depending on your View By filter selection: • Institution • Principal Investigator • Sponsor	Use this filter to view the Proposal Success Rate report results by: • Institution • Department (default) • Principal Investigator • Sponsor

The following table lists the columns and measures used in the Proposal Success Rate report.

Report Column / Measure Name	***Report Column / Measure Origin***
Institution	Grants Management Institution (D_GM_INST) Dimension
Department	Department (D_DEPT) Dimension
Principal Investigator	Grants Management Principal Investigator (D_GM_PI) Dimension
Sponsor	Sponsor (D_GM_SPONSOR) Dimension
Submit Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Awarded Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Submit Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact
Award Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact
Success Rate Count %	"Fact GM Proposal Award Summary"."Awarded Count" / "Fact GM Proposal Award Summary"."Submit Count" * 100
Realized %	"Fact GM Proposal Award Summary"."Total award amt - Sponsor" / ("Fact GM Proposal Award Summary"."Sponsor Direct Amount" + "Fact GM Proposal Award Summary"."Sponsor F&A Amount") * 100

Proposal Success Rate by PI Report

Access the Proposal Success Rate by PI report, which enables you to analyze the performance of principal investigators by measuring proposal submissions against those rejected and awarded.



	Submit Count	Reject Count	Awarded Count	Success Rate Count %
Principal Investigator				
Panther,Cynthia	9	2	4	44%
Rohein,Isabella	7	3	1	14%
Scott,Robert	10	0	8	80%
Vincent,Sonya	10	2	5	50%
Grand Total	**36**	**7**	**18**	**50%**

Proposal Success Rate by PI report

X,Y Axis Data	***View By Filter***
The Proposal Success Rate by PI graph displays *Principal Investigator* data on the x-axis and *Submit Count*, *Reject Count*, and *Awarded Count* data on the y-axis, with *Success Rate Count %* data plotted across the x/y-axis.	Use the Proposal Success Rate dashboard prompt to filter the report results by: • Principal Investigator ID • Submit Date

The following table lists the columns and measures used in the Proposal Success Rate by PI report.

Report Column / Measure Name	***Report Column / Measure Origin***
Principal Investigator	Grants Management Principal Investigator (D_GM_PI) Dimension
Submit Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Reject Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Awarded Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Success Rate Count %	"Fact GM Proposal Award Summary"."Awarded Count" / "Fact GM Proposal Award Summary"."Submit Count" * 100

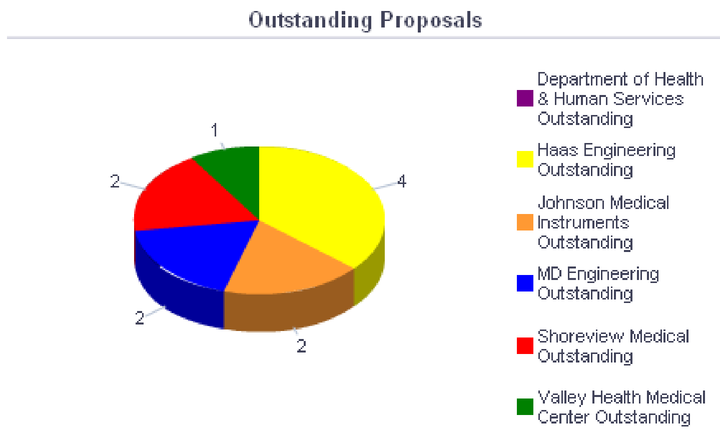
Outstanding Proposals by Sponsor Report

Access the Outstanding Proposals by Sponsor report, which enables you to analyze the status of outstanding proposals by sponsor.

Sponsor ID

1020;313;316;CC Apply Reset

Outstanding Proposals by Sponsor



	Submit Count	Withdrawn Count	Reject Count	Awarded Count	Outstanding
Sponsor					
Department of Health & Human Services	8	0	2	6	**0**
Haas Engineering	20	0	9	7	**4**
Johnson Medical Instruments	11	0	1	8	**2**
MD Engineering	16	0	2	12	**2**
Shoreview Medical	14	0	4	8	**2**
Valley Health Medical Center	9	0	2	6	**1**
Grand Total	**78**	**0**	**20**	**47**	**11**

Outstanding Proposals by Sponsor report

Pie Chart Data	***Sponsor ID Filter***
The Outstanding Proposals pie chart displays outstanding proposals data grouped by Sponsor.	Use this filter to view report results by a specific sponsor.

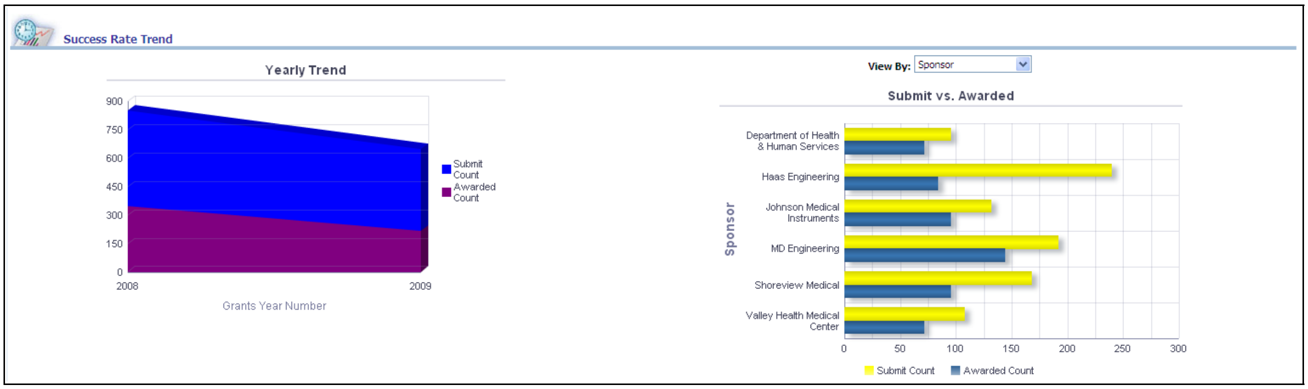
The following table lists the columns and measures used in the Outstanding Proposals by Sponsor report.

Report Column / Measure Name	***Report Column / Measure Origin***
Sponsor	Sponsor (D_GM_SPONSOR) Dimension
Submit Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Withdrawn Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Reject Count	Proposal Award Summary (F_GM_PRP_AWD) Fact

Report Column / Measure Name	*Report Column / Measure Origin*
Awarded Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Outstanding (proposals)	"Fact GM Proposal Award Summary"."Submit Count"-"Fact GM Proposal Award Summary"."Reject Count"-"Fact GM Proposal Award Summary"."Withdrawn Count"-"Fact GM Proposal Award Summary"."Awarded Count"

Success Rate Trend Report

Access the Success Rate Trend report, which enables you to measure proposal submissions against those awarded by year, sponsor, institution, department, or principal investigator.



Success Rate Trend report, part 1

	2008		2009		Submit Count	Awarded Count
	Submit Count	Awarded Count	Submit Count	Awarded Count		
Sponsor						
Department of Health & Human Services	96	72			**96**	**72**
Haas Engineering	96	48	144	36	**240**	**84**
Johnson Medical Instruments	72	72	60	24	**132**	**96**
MD Engineering	96	72	96	72	**192**	**144**
Shoreview Medical	84	48	84	48	**168**	**96**
Valley Health Medical Center	60	36	48	36	**108**	**72**
Grand Total	**504**	**348**	**432**	**216**	**936**	**564**

Success Rate Trend report, part 1

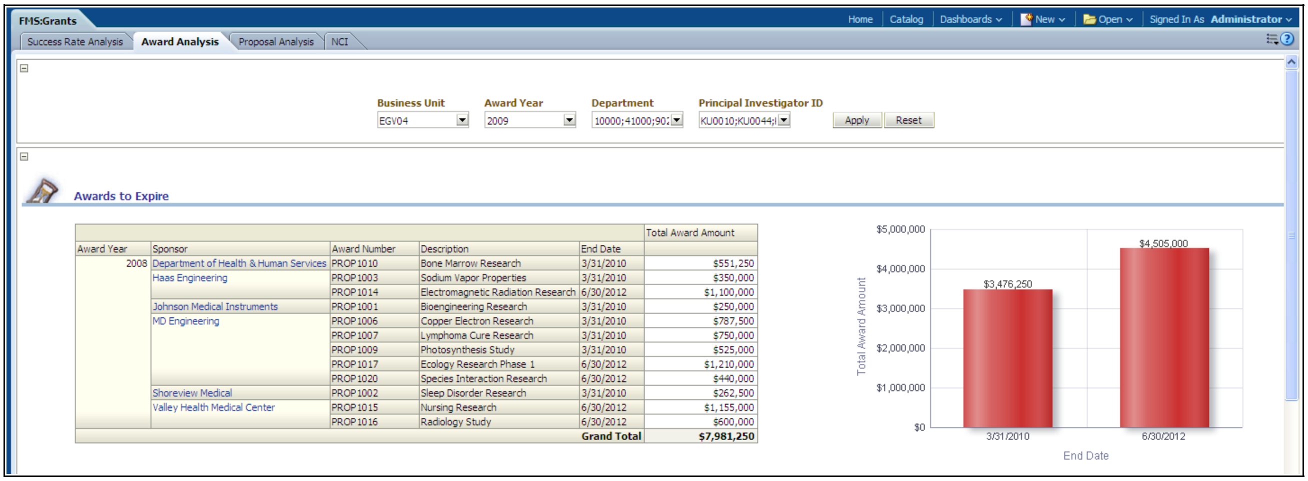
X,Y Axis Data Yearly Trend	***X,Y Axis Data Submit vs. Awarded***	***View By Filter***
The Yearly Trend graph displays *grant-year* data on the x-axis and *Submit Count* and *Awarded Count* data on the y-axis.	The Submit vs. Awarded graph displays *Submit Count* and *Awarded Count* data on the x-axis and *Sponsor* data on the y-axis. The y-axis can also plot any of the following dimensions, depending on your View By filter selection: • Institution • Department • Principal Investigator	Use this filter to view the Submit vs. Awarded graph results by: • Institution • Department • Principal Investigator • Sponsor (default)

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

Report Column / Measure Name	***Report Column / Measure Origin***
Grant-Year (Fiscal Year)	Day (D_DAY) Dimension
Institution	Grants Management Institution (D_GM_INST) Dimension
Department	Department (D_DEPT) Dimension
Principal Investigator	Grants Management Principal Investigator (D_GM_PI) Dimension
Sponsor	Sponsor (D_GM_SPONSOR) Dimension
Submit Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Withdrawn Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Reject Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Awarded Count	Proposal Award Summary (F_GM_PRP_AWD) Fact

Using the Grants Dashboard - Award Analysis Page

Access the Award Analysis page (Dashboards, FMS Reports, FMS: Grants, Award Analysis).

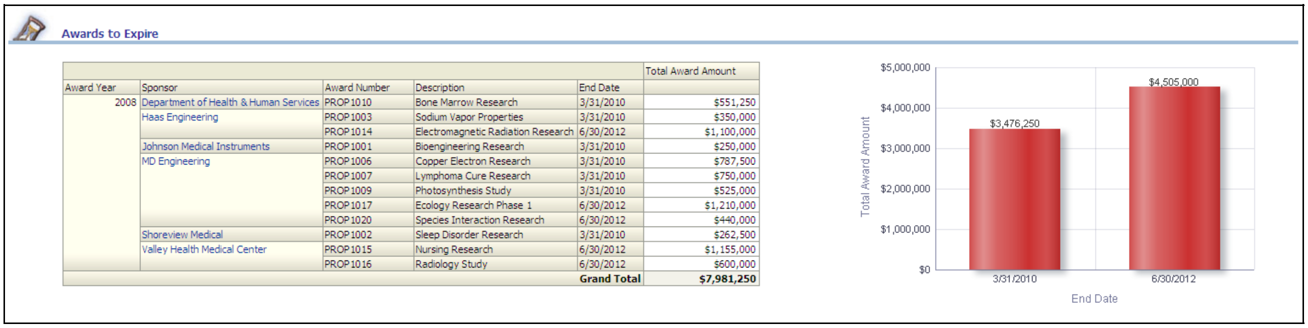


Award Analysis page

Usage	***Reports***	***Dashboard Prompt***
Provides you with an overview of award contributions and award expirations.	This page is comprised of the following reports: • Awards to Expire • Award Contribution	Use the Award Analysis page prompt to filter page results by: • Business Unit • Award Year • Department • Principal Investigator ID

Awards to Expire Report

Access the Awards to Expire report, which enables you to analyze award expiration dates and the related amount of each award.



Awards to Expire

					Total Award Amount
Award Year	Sponsor	Award Number	Description	End Date	
2008	Department of Health & Human Services	PROP1010	Bone Marrow Research	3/31/2010	$551,250
	Haas Engineering	PROP1003	Sodium Vapor Properties	3/31/2010	$350,000
		PROP1014	Electromagnetic Radiation Research	6/30/2012	$1,100,000
	Johnson Medical Instruments	PROP1001	Bioengineering Research	3/31/2010	$250,000
	MD Engineering	PROP1006	Copper Electron Research	3/31/2010	$787,500
		PROP1007	Lymphoma Cure Research	3/31/2010	$750,000
		PROP1009	Photosynthesis Study	3/31/2010	$525,000
		PROP1017	Ecology Research Phase 1	6/30/2012	$1,210,000
		PROP1020	Species Interaction Research	6/30/2012	$440,000
	Shoreview Medical	PROP1002	Sleep Disorder Research	3/31/2010	$262,500
	Valley Health Medical Center	PROP1015	Nursing Research	6/30/2012	$1,155,000
		PROP1016	Radiology Study	6/30/2012	$600,000
				Grand Total	**$7,981,250**

Awards to Expire report

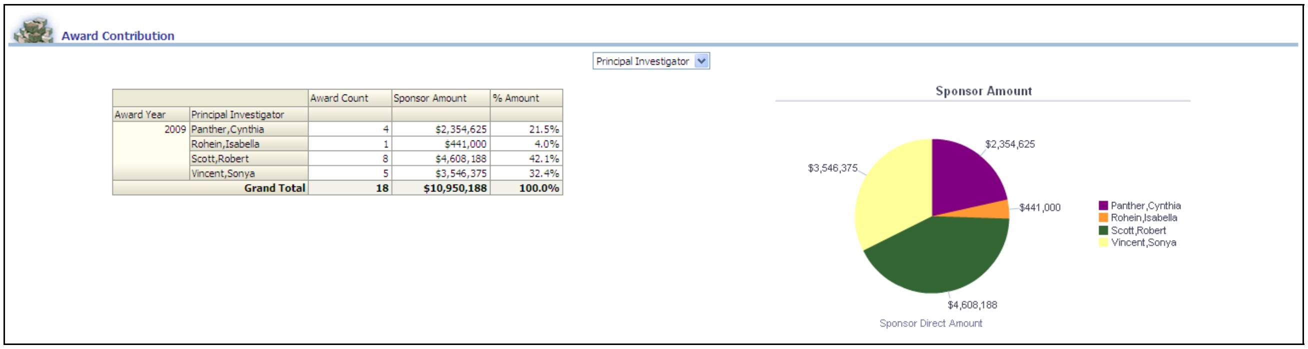
The Awards to Expire graph displays (award) End-date data on the x-axis and Total Award Amount data on the y-axis.

The following table lists the columns and measures used in the Awards to Expire report.

Report Column / Measure Name	***Report Column / Measure Origin***
Award Year	Grants Award (F_GM_AWARD) Fact
Award Number	Grants Award (F_GM_AWARD) Fact
Total Award Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact
Sponsor	Sponsor (D_GM_SPONSOR) Dimension
(Award) Description	"GM Award Atrribute Details"."Award Long Description"
End Date	"GM Award Atrribute Details"."Grant End Date"

Award Contribution Report

Access the Award Contribution report, which enables you to analyze sponsor award amounts by principal investigator or department.



Award Contribution report

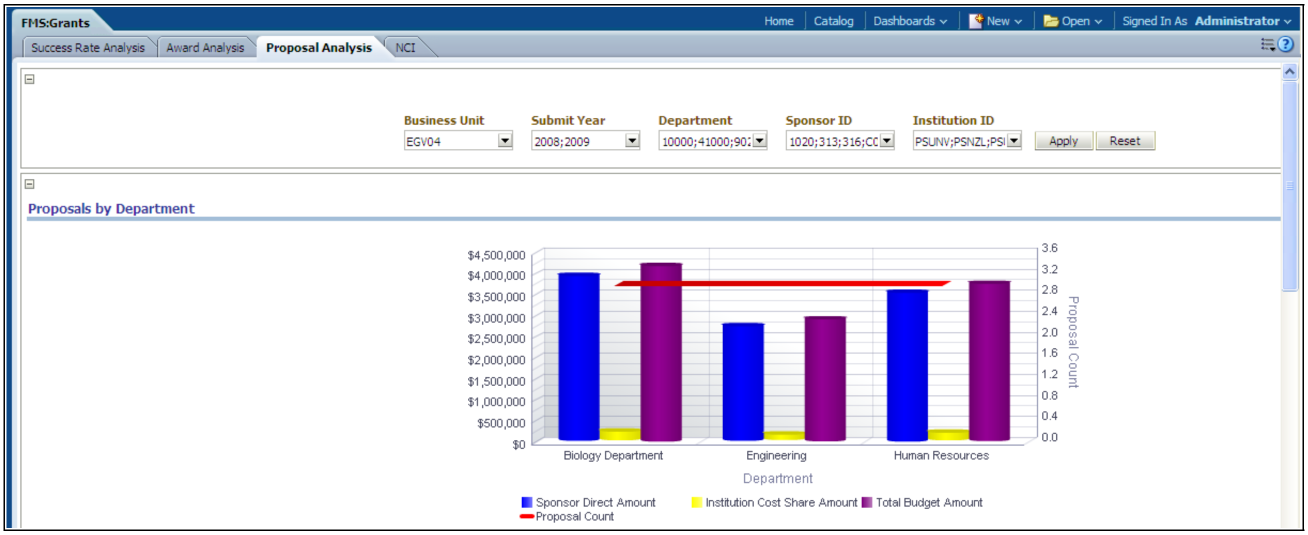
Pie Chart Data	***View By Filter***
The Award Contribution pie chart displays sponsor amount (award amount by sponsor) data grouped by Principal Investigator. Sponsor amount data can also be grouped by Department, depending on your View By filter selection.	Use this filter to view the Award Contribution report results by: • Principal Investigator (default) • Department

The following table lists the columns and measures used in the Award Contribution report.

Report Column / Measure Name	***Report Column / Measure Origin***
Principal Investigator	Grants Management Principal Investigator (D_GM_PI) Dimension
Department	Department (D_DEPT) Dimension
Award Year	Grants Award (F_GM_AWARD) Fact
Award Count	Proposal Award Summary (F_GM_PRP_AWD) Fact
Sponsor Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact
% Amount	(Sponsor Amount / Total Award Amount) * 100

Using the Grants Dashboard - Proposal Analysis Page

Access the Proposal Analysis page (Dashboards, FMS Reports, FMS: Grants, Proposal Analysis).



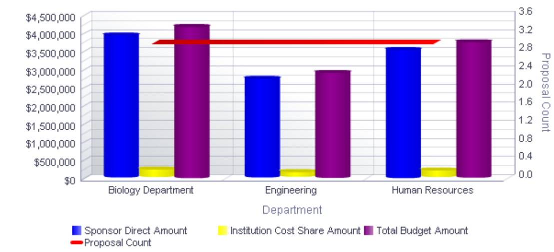
Proposal Analysis page

Usage	*Reports*	*Dashboard Prompt*
Provides you with an overview of proposal trends, submitted proposals, and outstanding proposals.	This page is comprised of the following reports: • Proposals by Department • Outstanding Proposals • Submitted Proposal Count Trend • Submitted Proposal Amount Trend	Use the Proposal Analysis page prompt to filter page results by: • Business Unit • Submit Year • Department • Sponsor ID • Institution ID

Proposals by Department Report

Access the Proposals by Department report, which enables you to analyze proposals by department.

Proposals by Department



		Sponsor Direct Amount	Institution Cost Share Amount	Total Budget Amount	Proposal Count
Submit Year	Department				
2009	Biology Department	$3,937,500	$236,250	$4,173,750	3
	Engineering	$2,740,500	$164,430	$2,904,930	3
	Human Resources	$3,538,500	$212,310	$3,750,810	3
	Grand Total	**$54,680,064**	**$3,280,804**	**$57,960,868**	**60**

Proposals by Department report

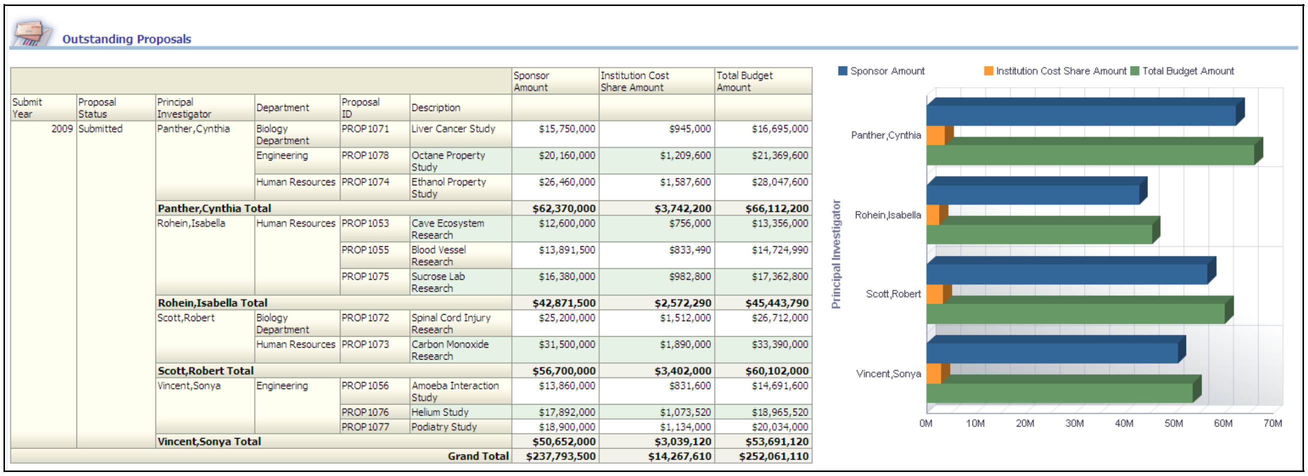
The Proposals by Department graph displays *Department* data on the x-axis and *Sponsor Direct Amount, Institution Cost Share Amount,* and *Total Budget Amount* data on the y-axis, with *Proposal Count* data plotted across the x/y-axis.

The following table lists the columns and measures used in the Proposals by Department report.

Report Column / Measure Name	***Report Column / Measure Origin***
(Proposal) Submit Year (Fiscal Year)	Day (D_DAY) Dimension
Department	Department (D_DEPT) Dimension
Sponsor Direct Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact
Institution Cost Share Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact
Total Budget Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact
Proposal Count	Proposal Award Summary (F_GM_PRP_AWD) Fact

Outstanding Proposals Report

Access the Outstanding Proposals report, which enables you to identify and analyze proposals that are flagged as outstanding.



Outstanding Proposals

Submit Year	Proposal Status	Principal Investigator	Department	Proposal ID	Description	Sponsor Amount	Institution Cost Share Amount	Total Budget Amount
2009	Submitted	Panther,Cynthia	Biology Department	PROP1071	Liver Cancer Study	$15,750,000	$945,000	$16,695,000
			Engineering	PROP1078	Octane Property Study	$20,160,000	$1,209,600	$21,369,600
			Human Resources	PROP1074	Ethanol Property Study	$26,460,000	$1,587,600	$28,047,600
		Panther,Cynthia Total				$62,370,000	$3,742,200	$66,112,200
		Rohein,Isabella	Human Resources	PROP1053	Cave Ecosystem Research	$12,600,000	$756,000	$13,356,000
				PROP1055	Blood Vessel Research	$13,891,500	$833,490	$14,724,990
				PROP1075	Sucrose Lab Research	$16,380,000	$982,800	$17,362,800
		Rohein,Isabella Total				$42,871,500	$2,572,290	$45,443,790
		Scott,Robert	Biology Department	PROP1072	Spinal Cord Injury Research	$25,200,000	$1,512,000	$26,712,000
			Human Resources	PROP1073	Carbon Monoxide Research	$31,500,000	$1,890,000	$33,390,000
		Scott,Robert Total				$56,700,000	$3,402,000	$60,102,000
		Vincent,Sonya	Engineering	PROP1056	Amoeba Interaction Study	$13,860,000	$831,600	$14,691,600
				PROP1076	Helium Study	$17,892,000	$1,073,520	$18,965,520
				PROP1077	Podiatry Study	$18,900,000	$1,134,000	$20,034,000
		Vincent,Sonya Total				$50,652,000	$3,039,120	$53,691,120
					Grand Total	$237,793,500	$14,267,610	$252,061,110

Outstanding Proposals report

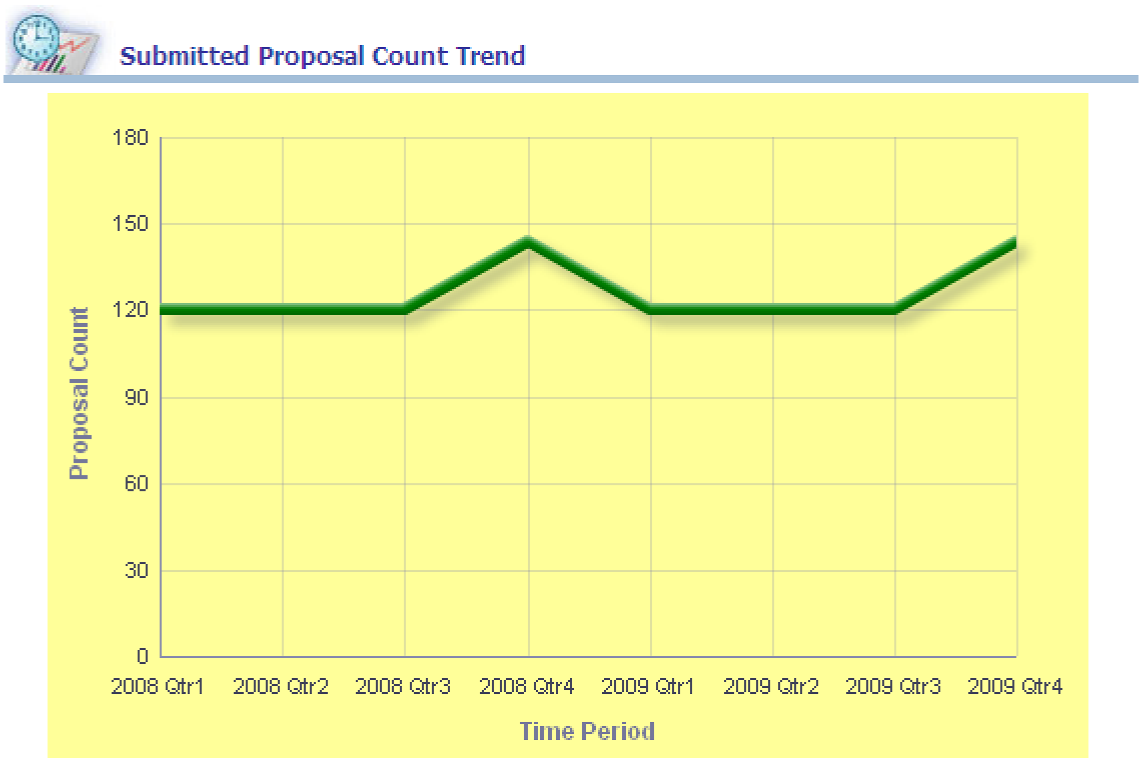
The Outstanding Proposals graph displays *Sponsor Amount*, *Institution Cost Share Amount*, and *Total Budget Amount* data on the x-axis and *Principal Investigator* data on the y-axis.

The following table lists the columns and measures used in the Outstanding Proposals report.

Report Column / Measure Name	***Report Column / Measure Origin***
(Proposal) Submit Year (Fiscal Year)	Day (D_DAY) Dimension
Principal Investigator	Grants Management Principal Investigator (D_GM_PI) Dimension
Department	Department (D_DEPT) Dimension
Proposal ID	Proposal Award Summary (F_GM_PRP_AWD) Fact
Proposal Status	Proposal Award Summary (F_GM_PRP_AWD) Fact Please note that the following Proposal Award Summary columns are used: • Created • Submitted • Awarded • Rejected • Withdrawn
(Proposal) Description	Grants Management Proposals (D_GM_PRP) Dimension
Sponsor Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact
Institution Cost Share Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact
Total Budget Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact

Submitted Proposal Count Trend Report

Access the Submitted Proposal Count Trend report, which enables you to analyze the total number of proposals submitted for a given fiscal year and quarter.



	Proposal Count							
	2008				2009			
	Qtr1	Qtr2	Qtr3	Qtr4	Qtr1	Qtr2	Qtr3	Qtr4
Department								
Biology Department	48	24	48	36	60	12	60	24
Engineering	60	48	60	60	48	60	48	48
Human Resources	12	48	12	48	12	48	12	72
Grand Total	**120**	**120**	**120**	**144**	**120**	**120**	**120**	**144**

Submitted Proposal Count Trend report

The Submitted Proposal Count Trend graph displays *Time Period* (Fiscal Year, Fiscal Quarter) data on the x-axis and *Proposal Count* data on the y-axis.

The following table lists the columns and measures used in the Submitted Proposal Count Trend report.

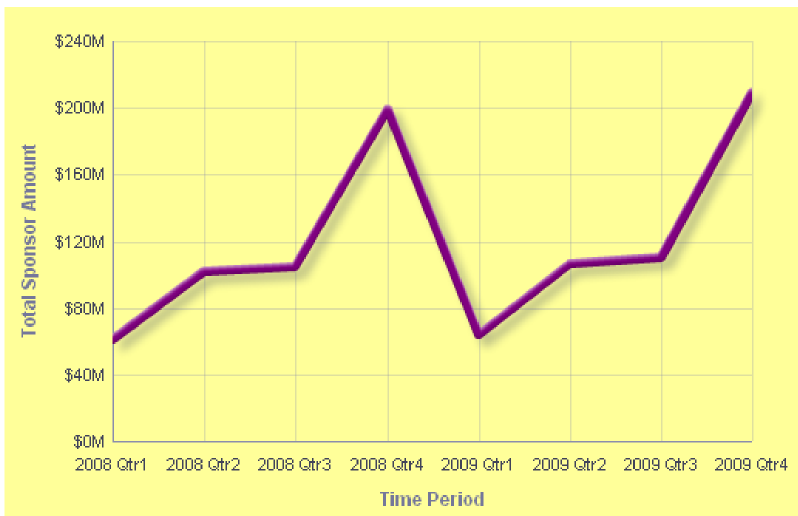
Report Column / Measure Name	***Report Column / Measure Origin***
Department	Department (D_DEPT) Dimension
Proposal Count	Proposal Award Summary (F_GM_PRP_AWD) Fact

Report Column / Measure Name	***Report Column / Measure Origin***
Time Period (Fiscal Year)	Day (D_DAY) Dimension
Time Period (Fiscal Quarter)	Day (D_DAY) Dimension

Submitted Proposal Amount Trend Report

Access the Submitted Proposal Amount Trend report, which enables you to analyze the total sponsor amount submitted for a given fiscal year and quarter.

Submitted Proposal Amount Trend



	Total Sponsor Amount							
	2008				2009			
	Qtr1	Qtr2	Qtr3	Qtr4	Qtr1	Qtr2	Qtr3	Qtr4
Department								
Biology Department	$20,265,000	$24,600,000	$48,450,000	$75,600,000	$32,460,756	$5,544,000	$76,860,000	$15,435,000
Engineering	$31,860,000	$31,800,000	$49,320,000	$64,140,000	$27,310,500	$46,305,000	$29,074,500	$67,914,000
Human Resources	$9,000,000	$45,330,000	$7,320,000	$59,640,000	$4,410,000	$54,967,500	$4,410,000	$126,000,000
Grand Total	**$61,125,000**	**$101,730,000**	**$105,090,000**	**$199,380,000**	**$64,181,256**	**$106,816,500**	**$110,344,500**	**$209,349,000**

Submitted Proposal Amount Trend report

The Submitted Proposal Amount Trend graph displays *Time Period* (Fiscal Year, Fiscal Quarter) data on the x-axis and *Total Sponsor Amount* data on the y-axis.

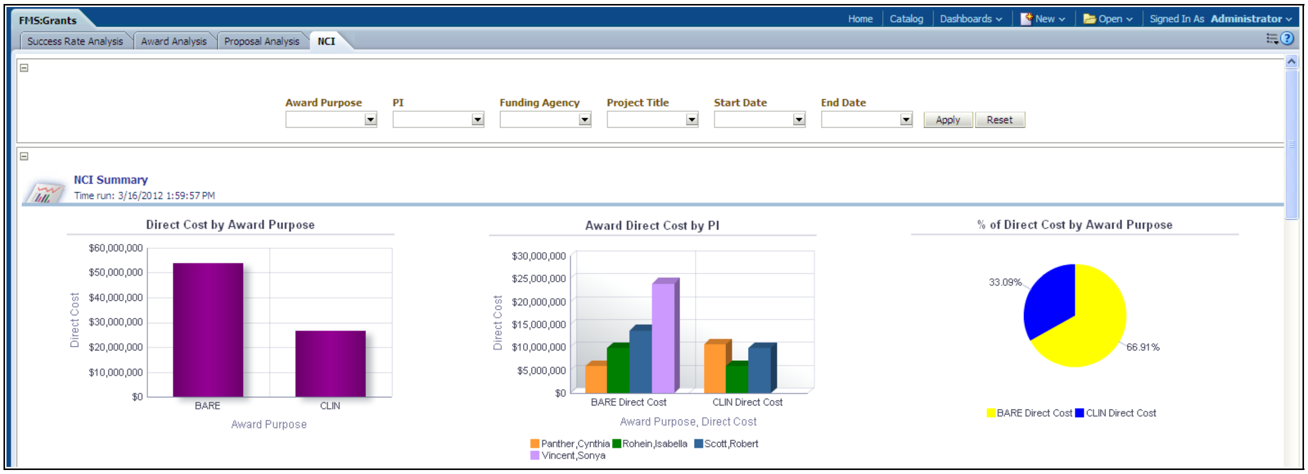
The following table lists the columns and measures used in the Submitted Proposal Amount Trend report.

Report Column / Measure Name	***Report Column / Measure Origin***
Department	Department (D_DEPT) Dimension
Total Sponsor Amount	Proposal Award Summary (F_GM_PRP_AWD) Fact

Report Column / Measure Name	***Report Column / Measure Origin***
Time Period (Fiscal Year)	Day (D_DAY) Dimension
Time Period (Fiscal Quarter)	Day (D_DAY) Dimension

Using the Grants Dashboard - NCI (National Cancer Institute) Page

Access the NCI (National Cancer Institute) page (Dashboards, FMS Reports, FMS: Grants, NCI).

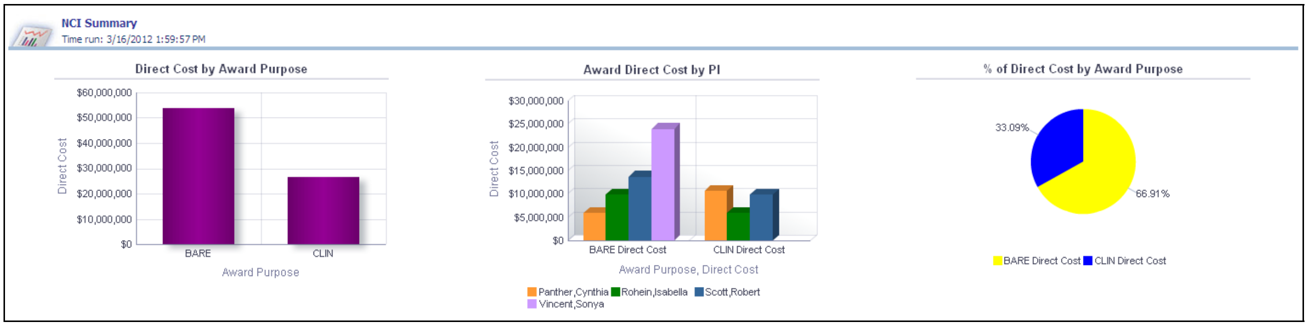


NCI page

Usage	***Reports***	***Dashboard Prompt***
Provides you with an overview of NCI (National Cancer Institute) grant awards for your institution.	This page contains the NCI Summary report.	Use the NCI page prompt to filter page results by: • Award Purpose • PI (Principal Investigator) • Funding Agency • Project Title • Start Date • End Date

NCI (National Cancer Institute) Summary Report

Access the NCI (National Cancer Institute) Summary report, which provides an overview of grant award for the National Cancer Institute and enables you to analyze direct cost by award purpose and award cost by principal investigator and award purpose.



NCI Summary report, part 1

BARE

PI	Funding Agency	Grant #	Start Date	End Date	Project Title	Direct Cost	Total Cost
Panther,Cynthia	Haas Engineering	-	4/1/2008	3/31/2010	Chemical Engineering	$367,500	$367,500
			3/1/2009	9/30/2015	Chemical Compund Study	$385,875	$385,875
			12/15/2009	1/31/2013	Ethanol Property Study	$2,205,000	$2,205,000
	Johnson Medical Instruments	-	12/31/2008	9/30/2013	Magnetic Scanning Study	$2,100,000	$2,100,000
	MD Engineering	-	7/1/2008	6/30/2012	Hydro-Carbon Study	$400,000	$400,000
			7/1/2009	12/1/2015	Copper Chemical Properties	$420,000	$420,000
Rohein,Isabella	Haas Engineering	-	4/1/2008	3/31/2010	Helium 3 Research	$750,000	$750,000
			7/1/2008	6/30/2012	Chiroptera Bat Study	$1,000,000	$1,000,000
			3/1/2009	9/30/2015	Hydrogen Properties Research	$787,500	$787,500
			10/1/2009	4/30/2015	No American Sparrow Migration Study	$640,500	$640,500
			12/15/2009	1/31/2013	Sucrose Lab Research	$1,365,000	$1,365,000
	Johnson Medical Instruments	-	12/31/2008	9/30/2013	Clorine Effects on Ecology Research	$1,300,000	$1,300,000
	MD Engineering	-	7/1/2008	6/30/2012	Wetland Habitat Study	$420,000	$420,000
			7/1/2009	12/1/2015	Helium 3 Research Phase 2	$441,000	$441,000
			12/15/2009	1/31/2013	Peregrine Falcon Migration Study	$787,500	$787,500
	Shoreview Medical	-	10/15/2008	9/30/2013	So America Bird Mating Study	$610,000	$610,000
			12/31/2008	9/30/2013	N American Raptor Migration Study	$750,000	$750,000
	Valley Health Medical Center	-	7/1/2009	12/1/2015	Cave Ecosystem Research	$1,050,000	$1,050,000
Scott,Robert	Haas Engineering	-	4/1/2008	3/31/2010	Sodium Vapor Properties	$350,000	$350,000
			10/15/2008	9/30/2013	Botanical Analysis of N American Plants	$350,000	$350,000
			3/1/2009	9/30/2015	H20 Pressure Properties	$367,500	$367,500
			12/15/2009	1/31/2013	Carbon Monoxide Research	$2,625,000	$2,625,000
					Solar Power Study	$1,806,000	$1,806,000
	Johnson Medical Instruments	-	12/31/2008	9/30/2013	Barium Properties in Medecine	$2,500,000	$2,500,000
	MD Engineering	-	4/1/2008	3/31/2010	Photosynthesis Study	$525,000	$525,000
			7/1/2008	6/30/2012	Ecology Research Phase 1	$1,210,000	$1,210,000
			7/1/2009	12/1/2015	Sodium Cloride Properties	$1,270,500	$1,270,500
			10/1/2009	4/30/2015	Underwater Plantlife Research	$367,500	$367,500
	National Institute of Health Science	-	1/1/2008	12/31/2008	-	$78,000	$80,800
	Shoreview Medical	-	12/31/2008	9/30/2013	Plant Study Research	$1,720,000	$1,720,000
	Valley Health Medical Center	-	3/1/2009	9/30/2015	Plantlife in Tropical Forest Study	$551,250	$551,250

NCI Summary report, part 2

CLIN

PI	Funding Agency	Grant #	Start Date	End Date	Project Title	Direct Cost	Total Cost
Panther,Cynthia	Department of Health & Human Services	-	4/1/2008	3/31/2010	Atmospheric Nitrogen Study	$500,000	$500,000
			10/15/2008	9/30/2013	Software Research	$1,250,000	$1,250,000
			12/31/2008	9/30/2013	Atmospheric Nitrogen Study Phase 2	$1,600,000	$1,600,000
	Johnson Medical Instruments	-	4/1/2008	3/31/2010	Bioengineering Research	$250,000	$250,000
			3/1/2009	9/30/2015	Urinary Lab Study	$262,500	$262,500
			10/1/2009	4/30/2015	Liver Cancer Study	$1,312,500	$1,312,500
	Shoreview Medical	-	3/1/2009	9/30/2015	Nitrogen Properties Research	$525,000	$525,000
			7/1/2009	12/1/2015	Kidney Dialisis Study	$1,212,750	$1,212,750
			10/1/2009	4/30/2015	Oxygen Properties Study	$459,375	$459,375
			12/15/2009	1/31/2013	Octane Property Study	$1,680,000	$1,680,000
	Valley Health Medical Center	-	7/1/2008	6/30/2012	Nursing Research	$1,155,000	$1,155,000
			10/15/2008	9/30/2013	Cumulus Cloud Research	$437,500	$437,500
Rohein,Isabella	Department of Health & Human Services	-	10/15/2008	9/30/2013	Lung Cancer Study	$1,100,000	$1,100,000
			12/31/2008	9/30/2013	Pericardium Health Study	$680,000	$680,000
	Johnson Medical Instruments	-	10/1/2009	4/30/2015	Capillary Contraction Research	$1,155,000	$1,155,000
	Shoreview Medical	-	7/1/2009	12/1/2015	Blood Vessel Research	$1,157,625	$1,157,625
			12/15/2009	1/31/2013	Melanoma Research	$714,000	$714,000
	Valley Health Medical Center	-	7/1/2008	6/30/2012	Heart Valve Synthesis Study	$1,102,500	$1,102,500
Scott,Robert	Department of Health & Human Services	-	4/1/2008	3/31/2010	Bone Marrow Research	$551,250	$551,250
			10/15/2008	9/30/2013	Human Genome Research	$2,000,000	$2,000,000
			12/31/2008	9/30/2013	Medical Bone & Muscle Study	$870,000	$870,000
	Johnson Medical Instruments	-	3/1/2009	9/30/2015	REM Sleep Study	$275,625	$275,625
			10/1/2009	4/30/2015	Spinal Cord Injury Research	$2,100,000	$2,100,000
	Shoreview Medical	-	4/1/2008	3/31/2010	Sleep Disorder Research	$262,500	$262,500
			3/1/2009	9/30/2015	Tuberculosus Study	$578,813	$578,813
			7/1/2009	12/1/2015	Sleep Interception Survey	$630,000	$630,000
			12/15/2009	1/31/2013	Acidic Digestive Property Research	$913,500	$913,500
	Valley Health Medical Center	-	7/1/2008	6/30/2012	Radiology Study	$600,000	$600,000
			10/15/2008	9/30/2013	Leukemia Research	$540,000	$540,000
			10/1/2009	4/30/2015	Surgical Technique Study	$567,000	$567,000

NCI Summary report, part 3

X,Y Axis Data ***Direct Cost by Award Purpose***	***X,Y Axis Data*** ***Award Direct Cost by Principal Investigator***	***Pie Chart Data*** ***% of Direct Cost by Award Purpose***
The Direct Cost by Award Purpose graph displays *Award Purpose* data on the x-axis and *Direct Cost* data on the y-axis. **Note.** Additional information about award purposes can be found in the grids below this graph.	The Award Direct Cost by Principal Investigator graph displays *Award Purpose* and *Principal Investigator* data on the x-axis and *Direct Cost* data on the y-axis. **Note.** Additional information about award purposes can be found in the grids below this graph.	The % of Direct Cost by Award Purpose pie chart displays % of Direct Cost data grouped by Award Purpose.

The following table lists the columns and measures used in the NCI Summary report.

Report Column / Measure Name	***Report Column / Measure Origin***
Award Purpose	Award Attribute (D_GM_ATTR_CODE) Dimension
Principal Investigator	Grants Management Principal Investigator (D_GM_PI) Dimension
Funding Agency	Sponsor (D_GM_SPONSOR) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Grant Number	Grants Management Award (D_GM_AWARD) Dimension
Project Title	Grants Management Project (D_GM_PRJ) Dimension
Start Date	Day (D_DAY) Dimension
End Date	Day (D_DAY) Dimension
Direct Cost	Grants Award (F_GM_AWARD) Fact
Total Cost	Grants Award (F_GM_AWARD) Fact
% of Direct Cost by Award Purpose	"Fact Grants Management Award"."Total Award Amount"

Chapter 8

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 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.

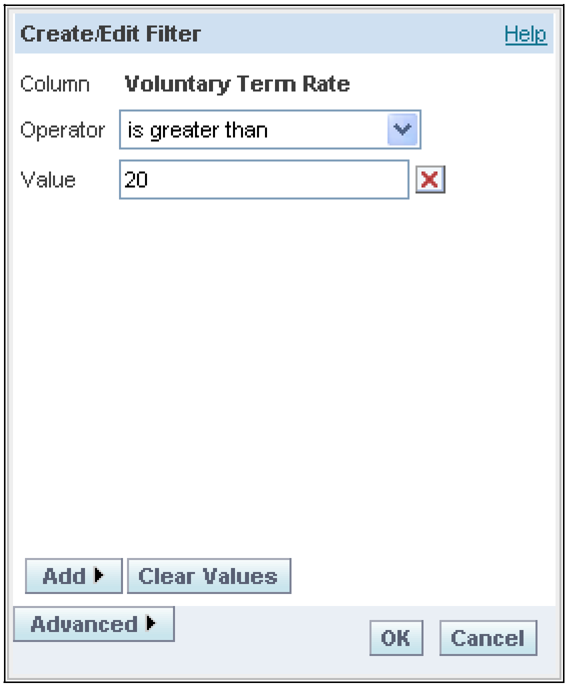
PeopleSoft provides dashboards that map to the following HCM Warehouse data marts:

- 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:



Create/Edit Filter page

See Chapter 8, "Working with Delivered OBIEE Dashboards for the Human Capital Management (HCM) Warehouse," Using the Workforce Profile Dashboard - Turnover Trend Page, page 235.

See Also

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

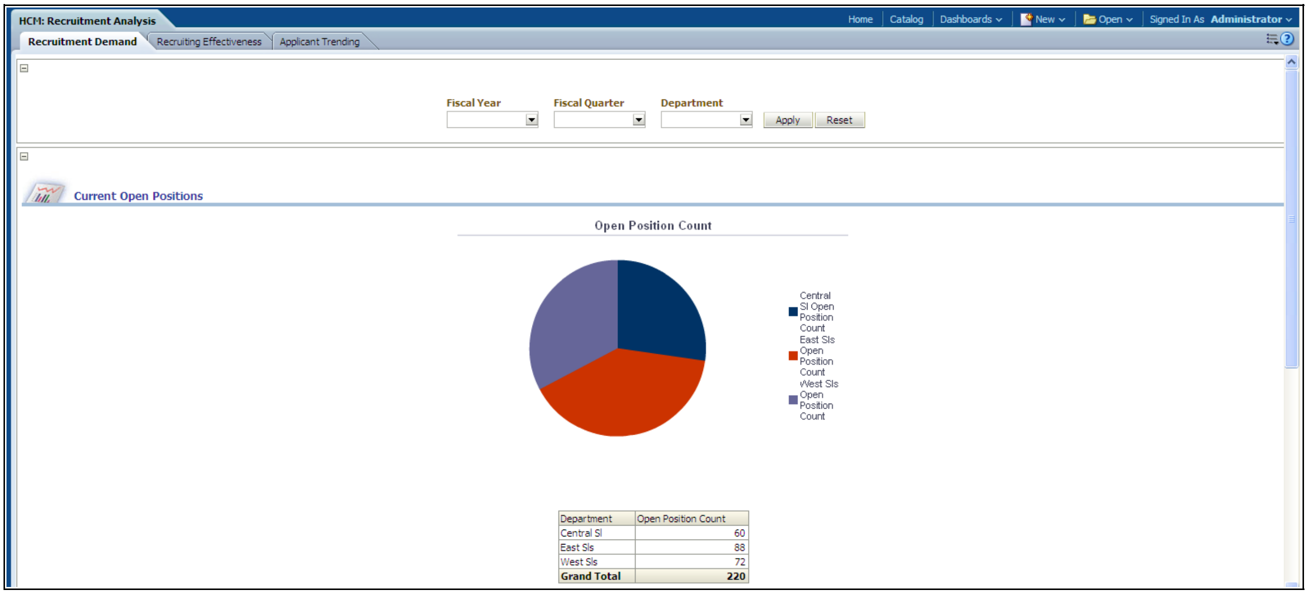
Delivered Security Groups

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

Using the Recruitment Analysis Dashboard - Recruitment Demand Page

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

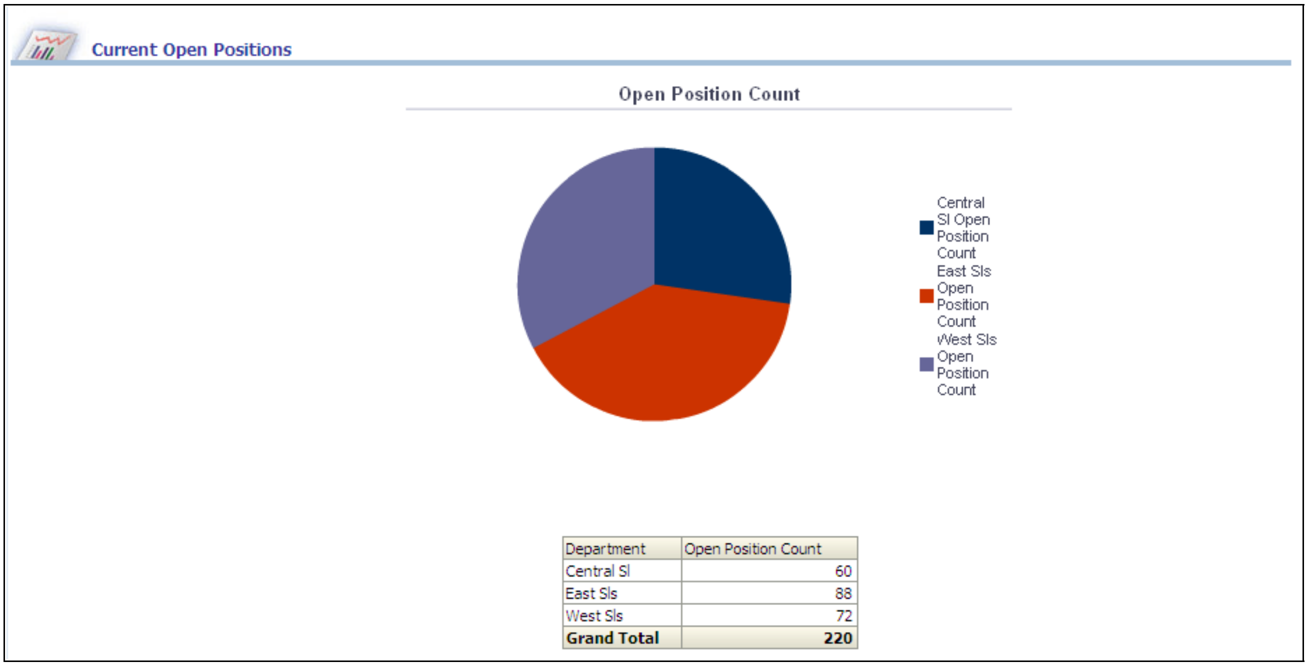


Recruitment Demand page

Usage	***Reports***	***Dashboard Prompt***
Provides you with an overview of recruiting metrics for your organization, including open positions and hiring demand counts analysis.	This page is comprised of the following reports: • Current Open Positions report • Hiring Demand Analysis report • Hiring Demand Surge Details report	Use the Recruitment Demand page prompt to filter page results by: • Fiscal Year • Fiscal Quarter • Department

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.*

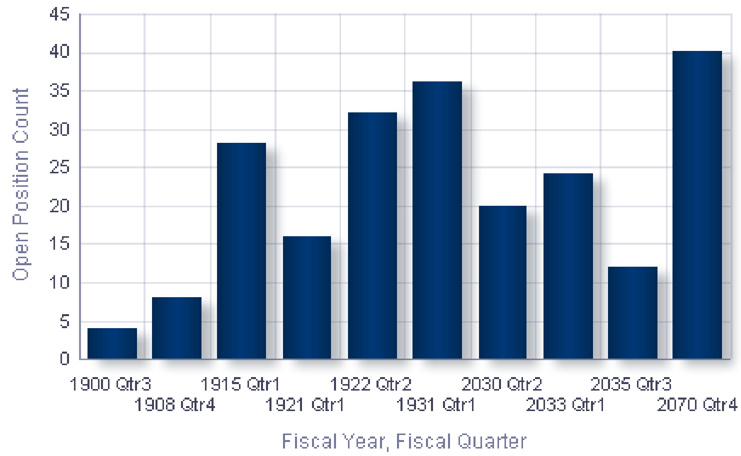
The following table lists the columns and measures used in the Current Open Positions report.

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



Fiscal Year	Fiscal Quarter	Department	Open Position Count
1900	Qtr3	East Sls	4
1908	Qtr4	Central Sl	8
1915	Qtr1	East Sls	28
1921	Qtr1	East Sls	16
1922	Qtr2	Central Sl	32
1931	Qtr1	West Sls	36
2030	Qtr2	Central Sl	20
2033	Qtr1	West Sls	24
2035	Qtr3	West Sls	12
2070	Qtr4	East Sls	40

Hiring Demand Analysis report

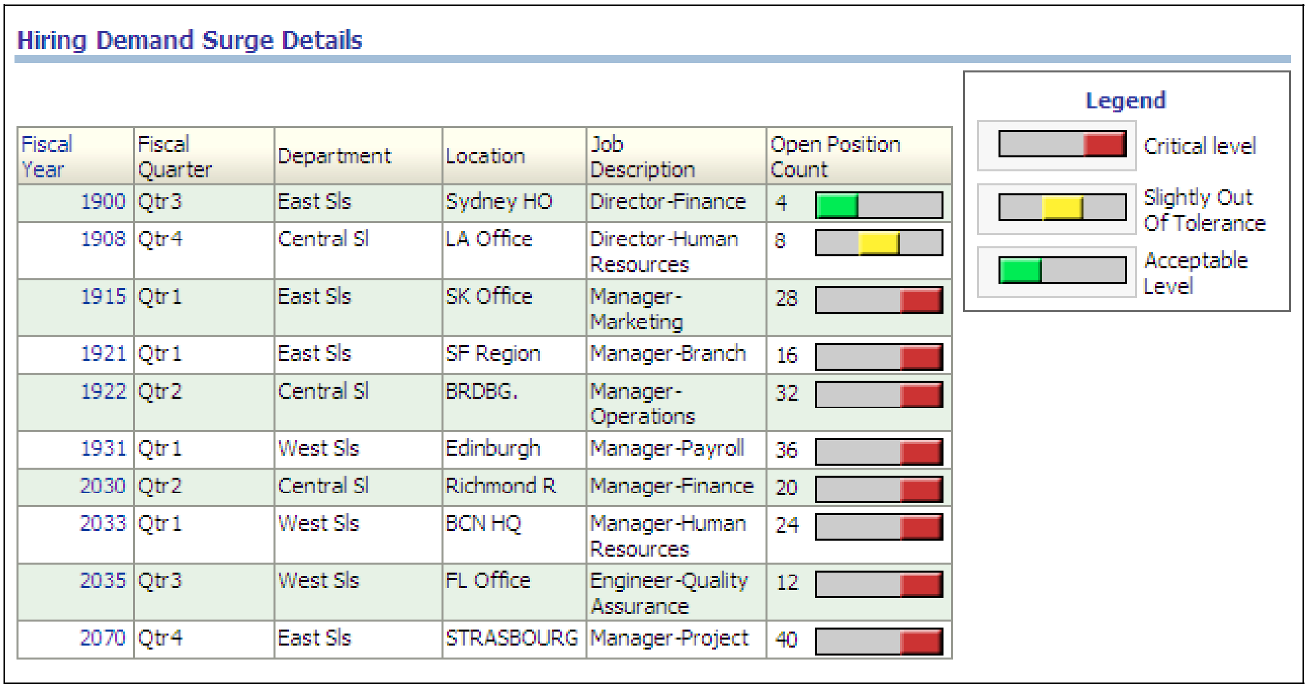
The Hiring Demand Analysis graph displays *Fiscal Year, Fiscal Quarter* data on the x-axis and *Open Position Count* data on the y-axis.

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

Fiscal Year	Fiscal Quarter	Department	Location	Job Description	Open Position Count
1900	Qtr3	East Sls	Sydney HO	Director-Finance	4
1908	Qtr4	Central Sl	LA Office	Director-Human Resources	8
1915	Qtr1	East Sls	SK Office	Manager-Marketing	28
1921	Qtr1	East Sls	SF Region	Manager-Branch	16
1922	Qtr2	Central Sl	BRDBG.	Manager-Operations	32
1931	Qtr1	West Sls	Edinburgh	Manager-Payroll	36
2030	Qtr2	Central Sl	Richmond R	Manager-Finance	20
2033	Qtr1	West Sls	BCN HQ	Manager-Human Resources	24
2035	Qtr3	West Sls	FL Office	Engineer-Quality Assurance	12
2070	Qtr4	East Sls	STRASBOURG	Manager-Project	40

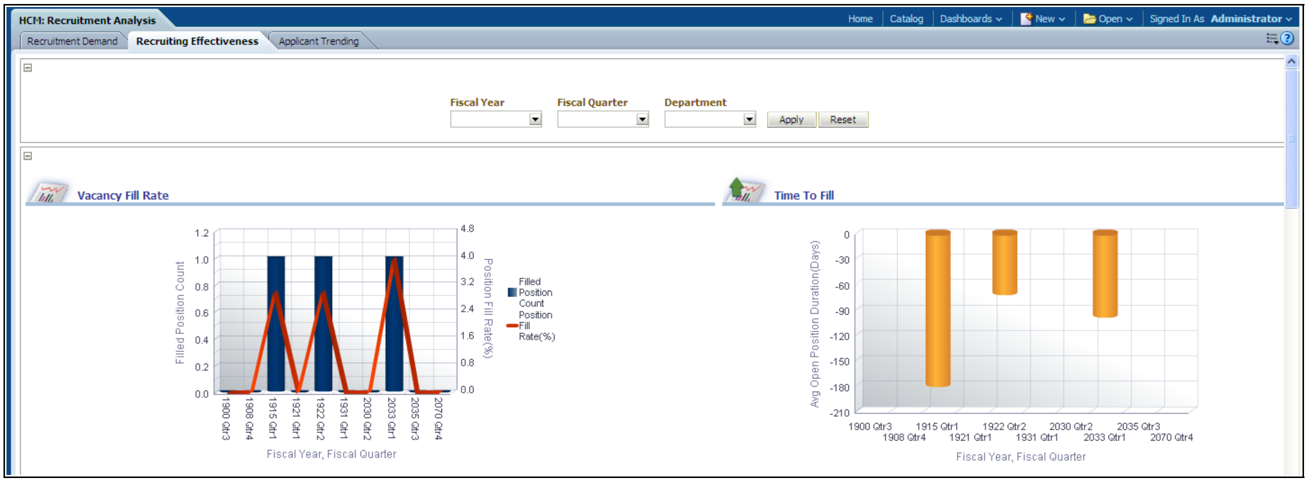
Hiring Demand Surge Details report

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 (Dashboards, HCM: Human Capital Management, HCM: Recruitment Analysis, Recruiting Effectiveness).

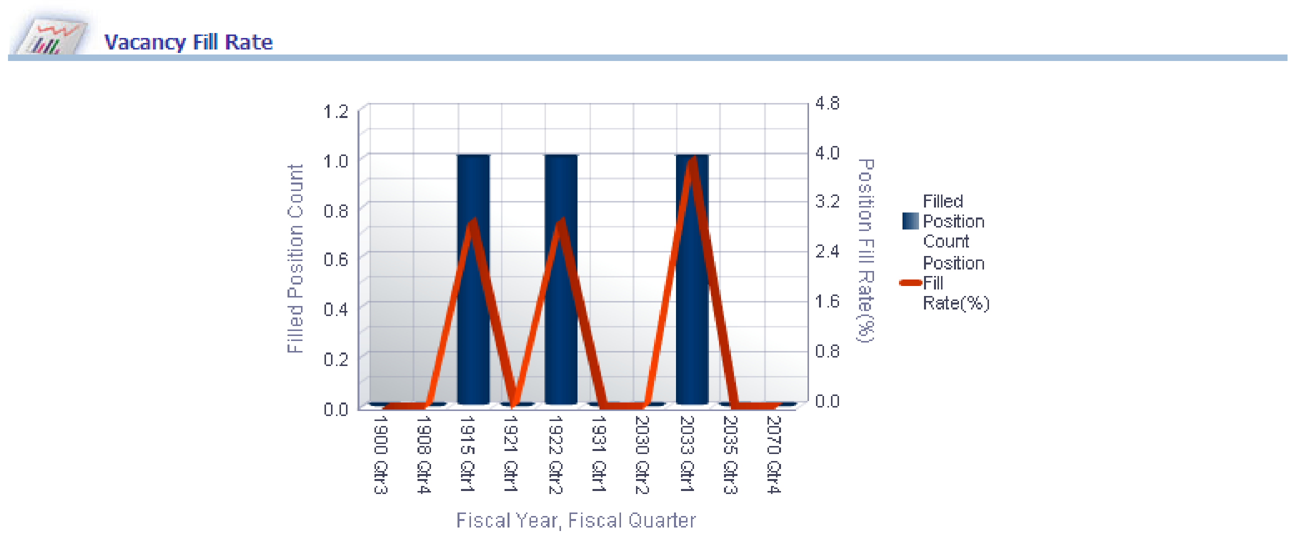


Recruiting Effectiveness page

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.	This page is comprised of the following reports: • Vacancy Fill Rate report • Time to Fill report • Recruiting Source Effectiveness report • Vacancy Fill Rate Details report • Recruiting Source Effectiveness Detail report	Use the Recruiting Effectiveness page prompt to filter page results by: • Fiscal Year • Fiscal Quarter • Department

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.



Fiscal Year	Fiscal Quarter	Open Position Count	Filled Position Count	Position Fill Rate(%)
1900	Qtr3	4	0	0
	1900 Total	**4**	**0**	**0**
1908	Qtr4	8	0	0
	1908 Total	**8**	**0**	**0**
1915	Qtr1	28	1	3
	1915 Total	**28**	**1**	**3**
1921	Qtr1	16	0	0
	1921 Total	**16**	**0**	**0**
1922	Qtr2	32	1	3
	1922 Total	**32**	**1**	**3**
1931	Qtr1	36	0	0
	1931 Total	**36**	**0**	**0**
2030	Qtr2	20	0	0
	2030 Total	**20**	**0**	**0**
2033	Qtr1	24	1	4
	2033 Total	**24**	**1**	**4**
2035	Qtr3	12	0	0
	2035 Total	**12**	**0**	**0**
2070	Qtr4	40	0	0
	2070 Total	**40**	**0**	**0**

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.

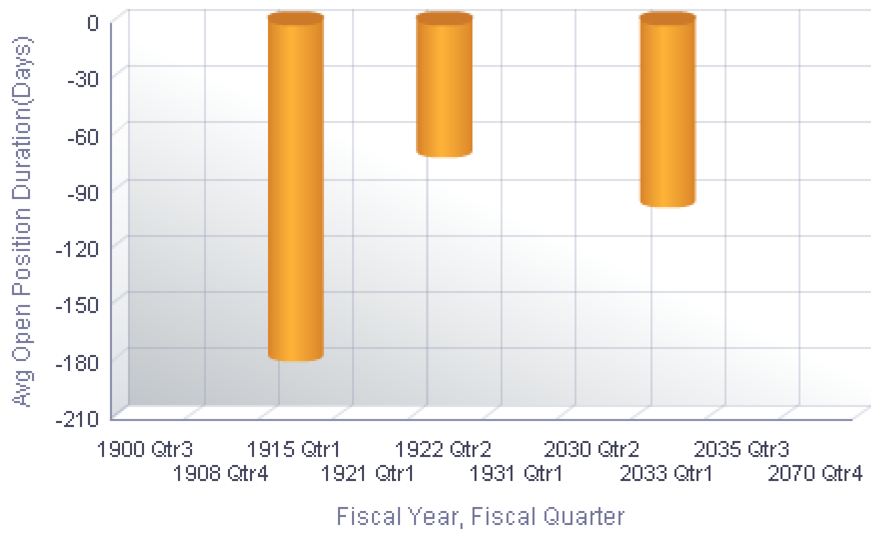
Report Column / Measure Name	***Report Column / Measure Origin***
Department	Department (D_DEPT) Dimension
Fiscal Year	Day (D_DAY) Dimension
Fiscal Quarter	Day (D_DAY) Dimension
Open Position Count	Recruitment (F_RCMNT) Fact

Report Column / Measure Name	***Report Column / Measure Origin***
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



Fiscal Year	Fiscal Quarter	Department	Avg Open Position Duration(Days)
1900	Qtr3	East Sls	
1900 Total			
1908	Qtr4	Central Sl	
1908 Total			
1915	Qtr1	East Sls	-179
1915 Total			**-179**
1921	Qtr1	East Sls	
1921 Total			
1922	Qtr2	Central Sl	-71
1922 Total			**-71**
1931	Qtr1	West Sls	
1931 Total			
2030	Qtr2	Central Sl	
2030 Total			
2033	Qtr1	West Sls	-97
2033 Total			**-97**
2035	Qtr3	West Sls	
2035 Total			
2070	Qtr4	East Sls	
2070 Total			

Time to Fill report

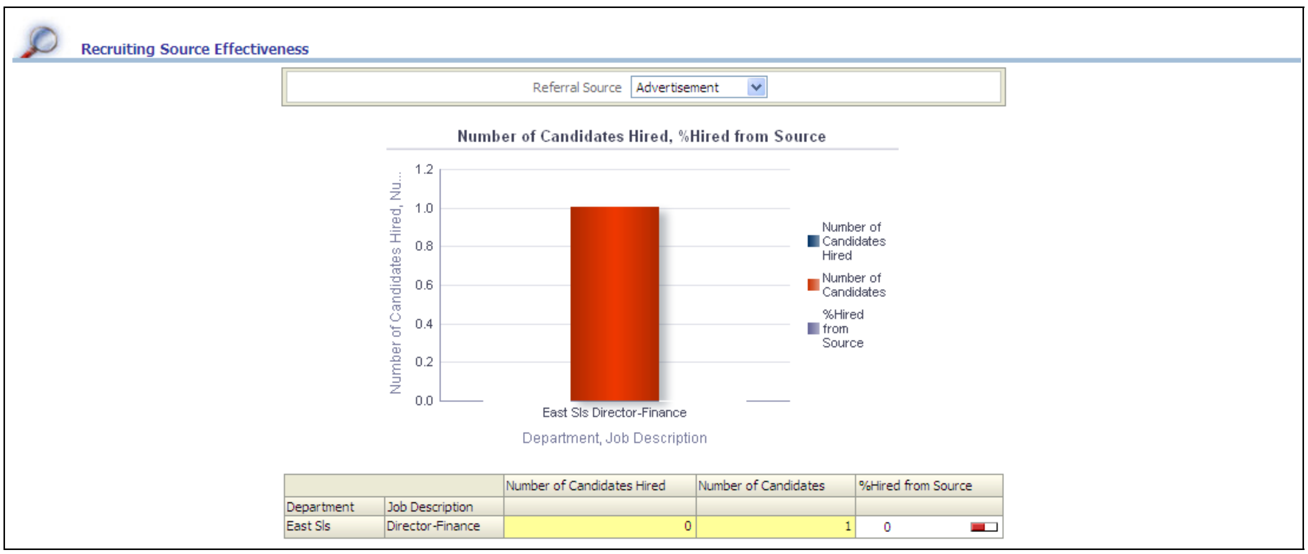
The Time to Fill graph displays *Fiscal Year, Fiscal Quarter* data on the x-axis and *Average Open Position Duration (Days)* data on the y-axis.

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

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
Average Open Position Duration (Days)	Recruitment (F_RCMNT) Fact: 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

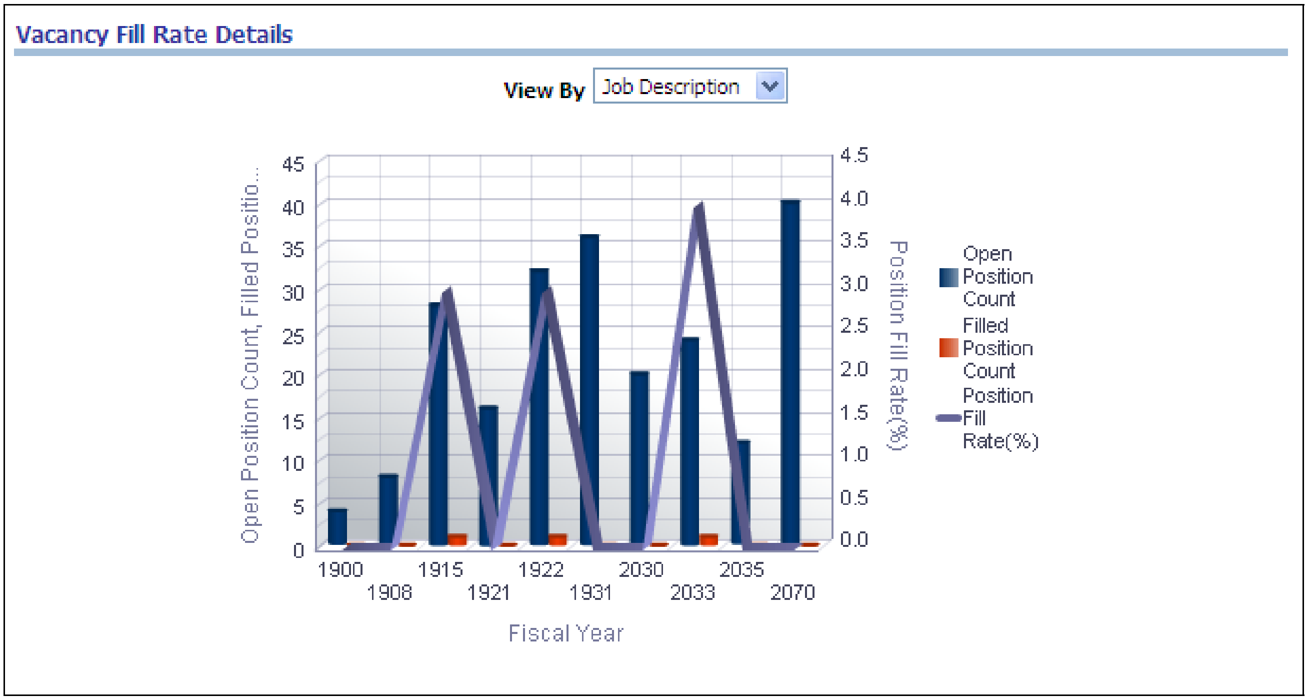
X,Y Axis Data	***Referral Source Filter***
The Recruiting Source Effectiveness graph displays *Department* and *Job Description* data on the x-axis and *Number of Candidates, Number of Candidates Hired* and *% Hired from Source* data on the y-axis.	Use this filter to view report results by the following referral sources: • *Advertisement* • *Client Referral* • *Walk-In* • *Employee* • *Executive Referral* • *Former Employee* • *Job Fair* • *Open House* • *College Recruiting* • *Agency*

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
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 report, part 1

Fiscal Year	Fiscal Quarter	Department	Job Description	Open Position Count	Filled Position Count	Position Fill Rate(%)
1900	Qtr3	East Sls	Director-Finance	4	0	0
1900 Total				**4**	**0**	**0**
1908	Qtr4	Central Sl	Director-Human Resources	8	0	0
1908 Total				**8**	**0**	**0**
1915	Qtr1	East Sls	Manager-Marketing	28	1	0
1915 Total				**28**	**1**	**3**
1921	Qtr1	East Sls	Manager-Branch	16	0	0
1921 Total				**16**	**0**	**0**
1922	Qtr2	Central Sl	Manager-Operations	32	1	0
1922 Total				**32**	**1**	**3**
1931	Qtr1	West Sls	Manager-Payroll	36	0	0
1931 Total				**36**	**0**	**0**
2030	Qtr2	Central Sl	Manager-Finance	20	0	0
2030 Total				**20**	**0**	**0**
2033	Qtr1	West Sls	Manager-Human Resources	24	1	0
2033 Total				**24**	**1**	**4**
2035	Qtr3	West Sls	Engineer-Quality Assurance	12	0	0
2035 Total				**12**	**0**	**0**
2070	Qtr4	East Sls	Manager-Project	40	0	0
2070 Total				**40**	**0**	**0**

Vacancy Fill Rate Details report, part 2

X,Y Axis Data	***View By Filter***
The Vacancy Fill Rate Details graph displays *Fiscal Year* data on the x-axis and *Open Position Count, Filled Position Count* and *Position Fill Rate* data on the y-axis.	Use this filter to view report results by: • *Location* • *Job Family Description* • *Job Description* (default) • *Grade*

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

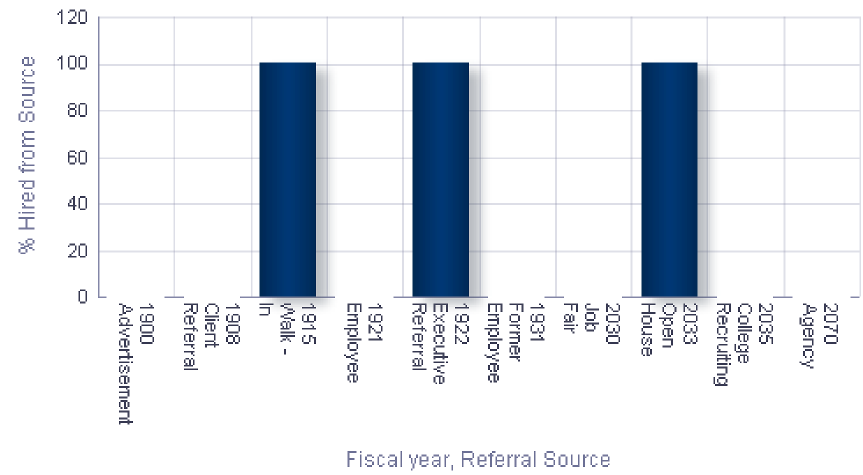
Report Column / Measure Name	***Report Column / Measure Origin***
Fiscal Year	Day (D_DAY) Dimension
Fiscal Quarter	Day (D_DAY) Dimension
Department	Department (D_DEPT) Dimension
Location	Location (D_LOCATION) Dimension
Job Description	Employee Job Code (D_EMPL_JOB) Dimension
Job Family Description	Employee 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 (%)	("Fact Recruitment"."Hire Count") /("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

View By Job Series



Fiscal year	Fiscal Quarter	Referral Source	Job Series	Number of Candidates	Number of Candidates Hired	% Hired from Source
1900	Qtr3	Advertisement	Director-Finance	1	0	0
1908	Qtr4	Client Referral	Director-Human Resources	1	0	0
1915	Qtr1	Walk - In	Manager-Marketing	1	1	100
1921	Qtr1	Employee	Manager-Branch	1	0	0
1922	Qtr2	Executive Referral	Manager-Operations	1	1	100
1931	Qtr1	Former Employee	Manager-Payroll	1	0	0
2030	Qtr2	Job Fair	Manager-Finance	1	0	0
2033	Qtr1	Open House	Manager-Human Resources	1	1	100
2035	Qtr3	College Recruiting	Engineer-Quality Assurance	1	0	0
2070	Qtr4	Agency	Manager-Project	1	0	0

Recruiting Source Effectiveness Detail report

X,Y Axis Data	***View By Filter***
The Recruiting Source Effectiveness Detail graph displays *Fiscal Year* and *Referral Source* data on the x-axis and *Percent Hired from Source* data on the y-axis.	Use this filter to view report results by: • *Location* • *Department* • *Job Series* (default)

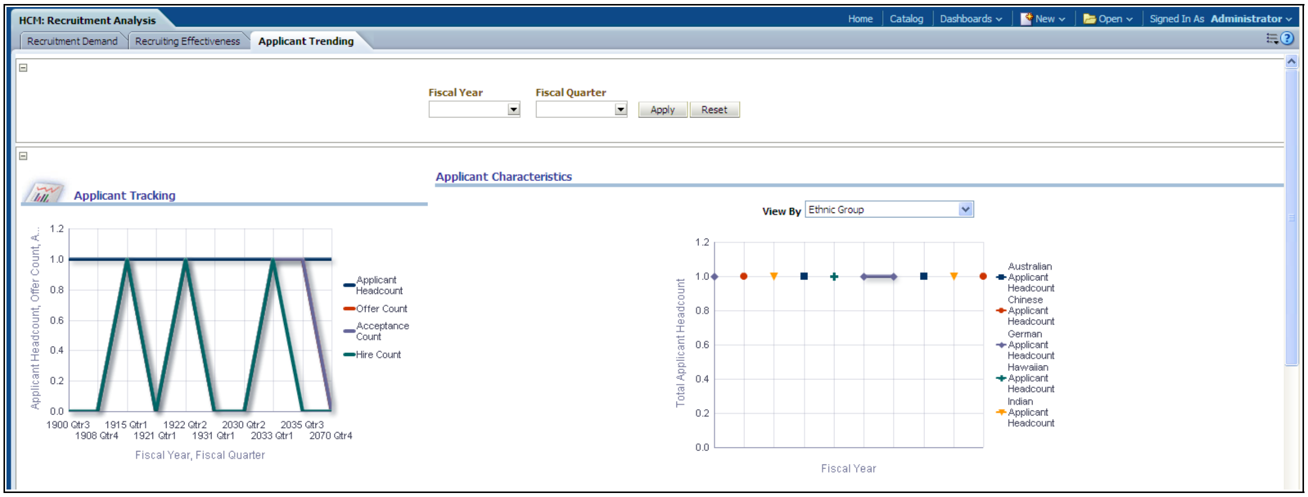
The following table lists the columns and measures used in the Recruiting Source Effectiveness Detail report.

Report Column / Measure Name	***Report Column / Measure Origin***
Fiscal Year	Day (D_DAY) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
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

Using the Recruitment Analysis Dashboard - Applicant Trending Page

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

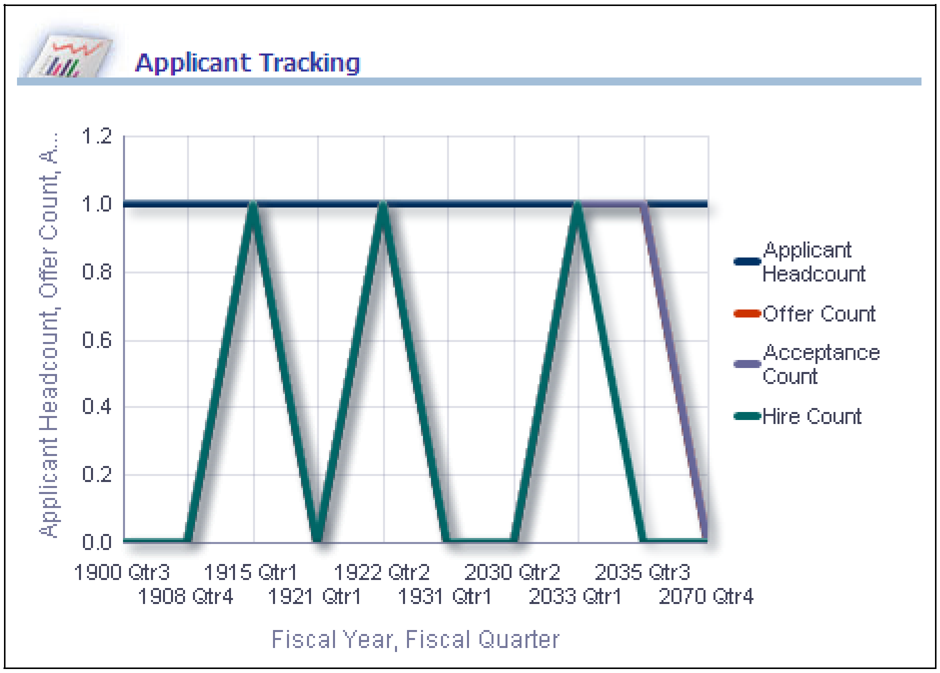


Applicant Trending page

Usage	***Reports***	***Dashboard Prompt***
Provides an overview of applicant trends and characteristics for your organization.	This page is comprised of the following reports: • Applicant Tracking report • Applicant Characteristics report	Use the Applicant Trending page prompt to filter page results by: • Fiscal Year • Fiscal Quarter

Applicant Tracking Report

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



Applicant Tracking report, part 1

Fiscal Year	Fiscal Quarter	Applicant Headcount	Offer Count	Acceptance Count	Hire Count
1900	Qtr3	1	0	0	0
1900 Total		**1**	**0**	**0**	**0**
1908	Qtr4	1	0	0	0
1908 Total		**1**	**0**	**0**	**0**
1915	Qtr1	1	1	1	1
1915 Total		**1**	**1**	**1**	**1**
1921	Qtr1	1	0	0	0
1921 Total		**1**	**0**	**0**	**0**
1922	Qtr2	1	1	1	1
1922 Total		**1**	**1**	**1**	**1**
1931	Qtr1	1	0	0	0
1931 Total		**1**	**0**	**0**	**0**
2030	Qtr2	1	0	0	0
2030 Total		**1**	**0**	**0**	**0**
2033	Qtr1	1	1	1	1
2033 Total		**1**	**1**	**1**	**1**
2035	Qtr3	1	1	1	0
2035 Total		**1**	**1**	**1**	**0**
2070	Qtr4	1	0	0	0
2070 Total		**1**	**0**	**0**	**0**

Applicant Tracking report, part 2

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.

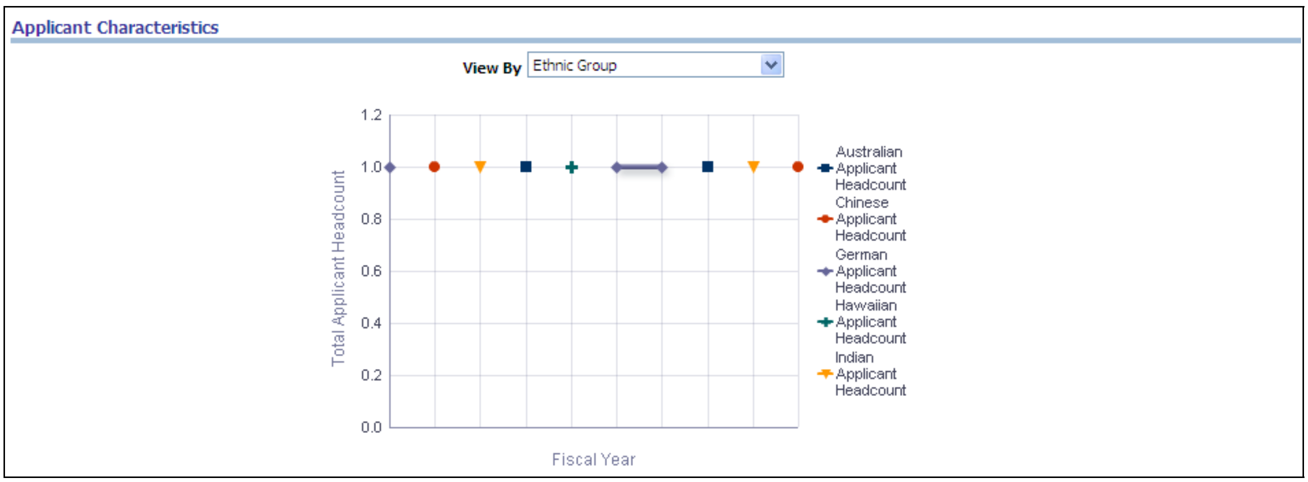
The following table lists the columns and measures used in the Applicant Tracking report.

Report Column / Measure Name	***Report Column / Measure Origin***
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: COUNT_DISTINCT(CASE WHEN Dimension Recruitment Status Reason.Recruitment Area Code = '3' AND Dimension Recruitment Status Reason.Recruitment Status Code IN ('070','071','075','076','077','078','080','090','100','110','120') THEN Fact Recruitment.Applicant Sid ELSE NULL END)

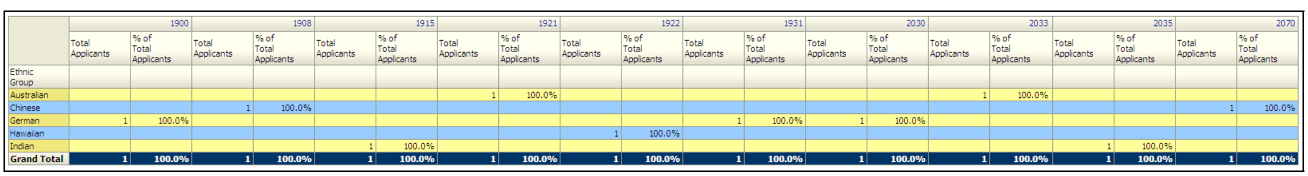
Report Column / Measure Name	***Report Column / Measure Origin***
Acceptance Count	Recruitment (F_RCMNT) Fact: COUNT_DISTINCT(CASE WHEN Dimension Recruitment Status Reason.Recruitment Area Code = '3' AND Dimension Recruitment Status Reason.Recruitment Status Code IN ('071','075','076','077','078','080','090','100','110','120') THEN Fact Recruitment.Applicant Sid ELSE NULL 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, part 1



	1900		1908		1915		1921		1922	
	Total Applicants	% of Total Applicants	Total Applicants	% of Total Applicants	Total Applicants	% of Total Applicants	Total Applicants	% of Total Applicants	Total Applicants	% of Total Applicants
Ethnic Group										
Australian							1	100.0%		
Chinese			1	100.0%						
German	1	100.0%								
Hawaiian									1	100.0%
Indian					1	100.0%				
Grand Total	**1**	**100.0%**	**1**	**100.0%**	**1**	**100.0%**	**1**	**100.0%**	**1**	**100.0%**

	1931		2030		2033		2035		2070	
	Total Applicants	% of Total Applicants	Total Applicants	% of Total Applicants	Total Applicants	% of Total Applicants	Total Applicants	% of Total Applicants	Total Applicants	% of Total Applicants
Ethnic Group										
Australian					1	100.0%				
Chinese									1	100.0%
German	1	100.0%	1	100.0%						
Hawaiian										
Indian							1	100.0%		
Grand Total	**1**	**100.0%**	**1**	**100.0%**	**1**	**100.0%**	**1**	**100.0%**	**1**	**100.0%**

Applicant Characteristics report, part 2

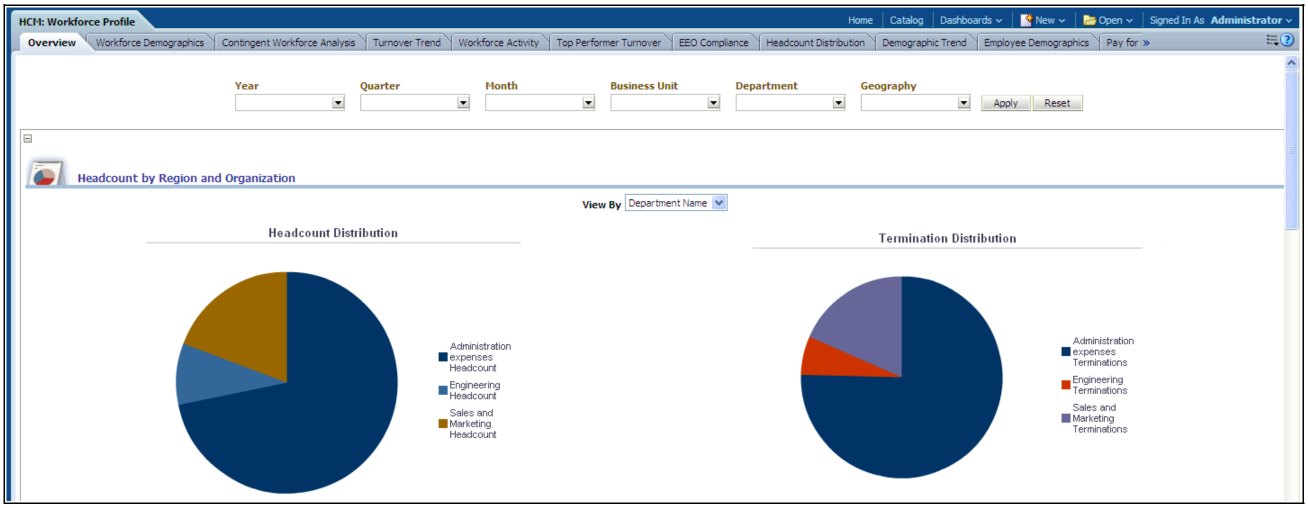
X,Y Axis Data	***View By Filter***
The Applicant Characteristics graph displays *Fiscal Year* data on the x-axis and *Total Applicant Headcount* and data on the y-axis. The y-axis will also display one of the following values, depending on your View By filter selection: • *Applicant Marital Status* • *Applicant Disabled Indicator* • *Applicant Highest Education Level* • *Applicant Veterans Preference* • *Applicant Full/Part Time* • *Applicant Salary Grade* • *Ethnic Group* (default)	Use this filter to view report results by: • *Applicant Marital Status* • *Applicant Disabled Indicator* • *Applicant Highest Education Level* • *Applicant Veterans Preference* • *Applicant Full/Part Time* • *Applicant Salary Grade* • *Ethnic Group* (default)

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
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

Using the Workforce Profile Dashboard - Overview Page

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

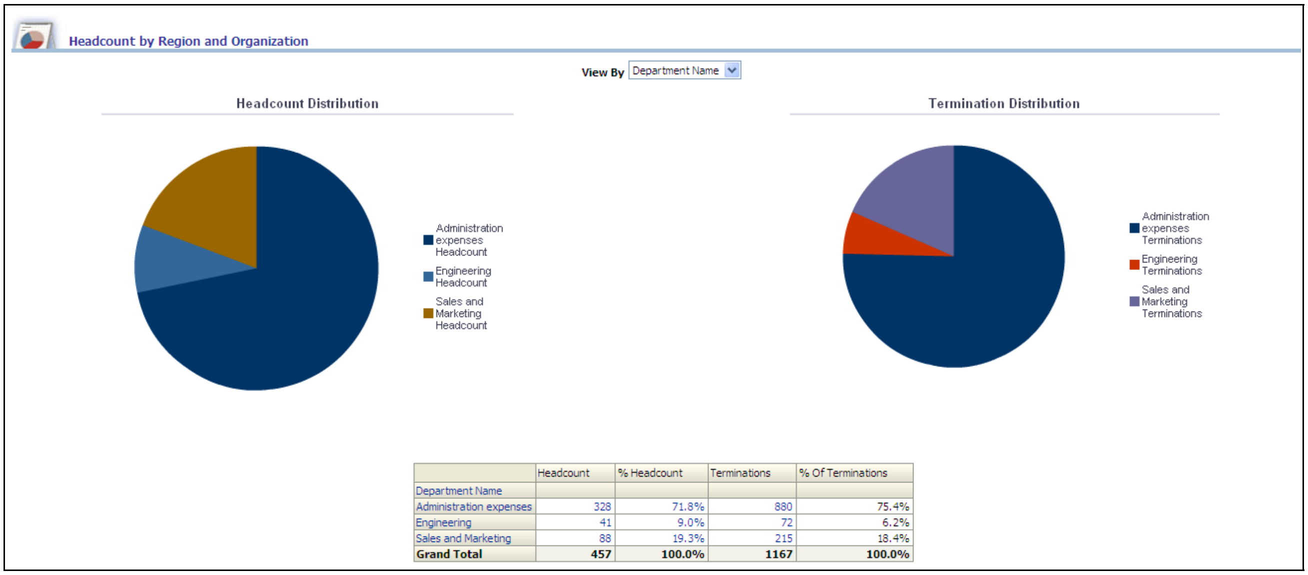


Workforce Profile - Overview page

Usage	***Reports***	***Dashboard Prompt***
Provides an overview of headcount, turnover, and promotion trends for your organization.	This page is comprised of the following reports: • Headcount by Region and Organization report • Headcount Trend report • Turnover Trend report • Promotion Trend report	Use the Workforce Profile - Overview page prompt to filter page results by: • Year • Quarter • Month • Business Unit • Department Name • Geography

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

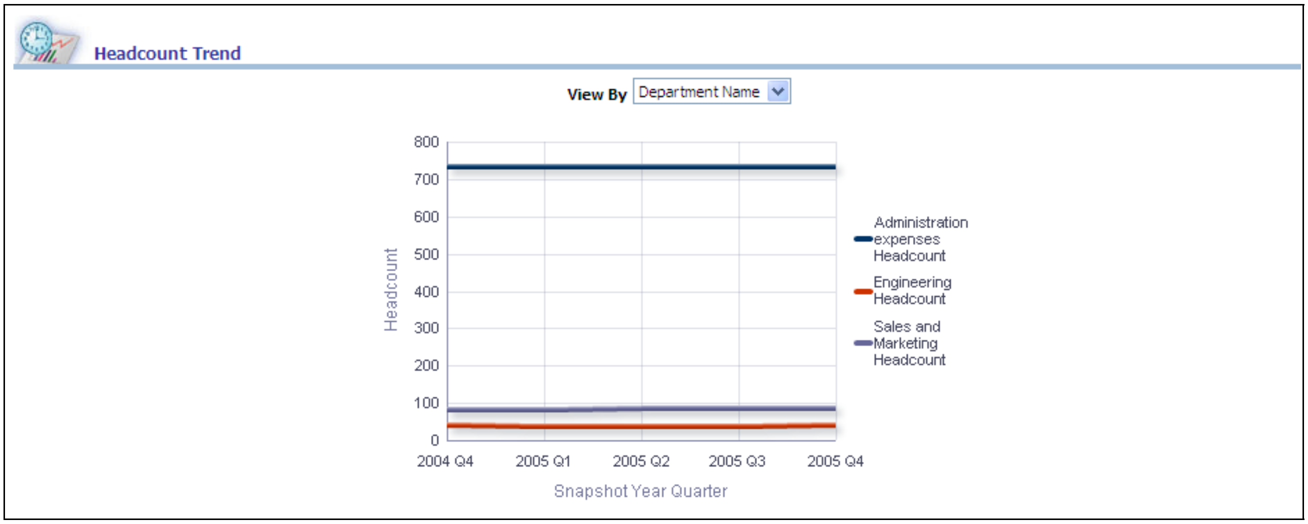
View By Filter - Department Name (Default)	***View By Filter - Location***
The Headcount Distribution pie chart displays *Headcount / Percent Headcount* data grouped by *Department.* The Termination Distribution pie chart displays *Terminations / Percent Terminations* data grouped by *Department.* **Note.**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

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

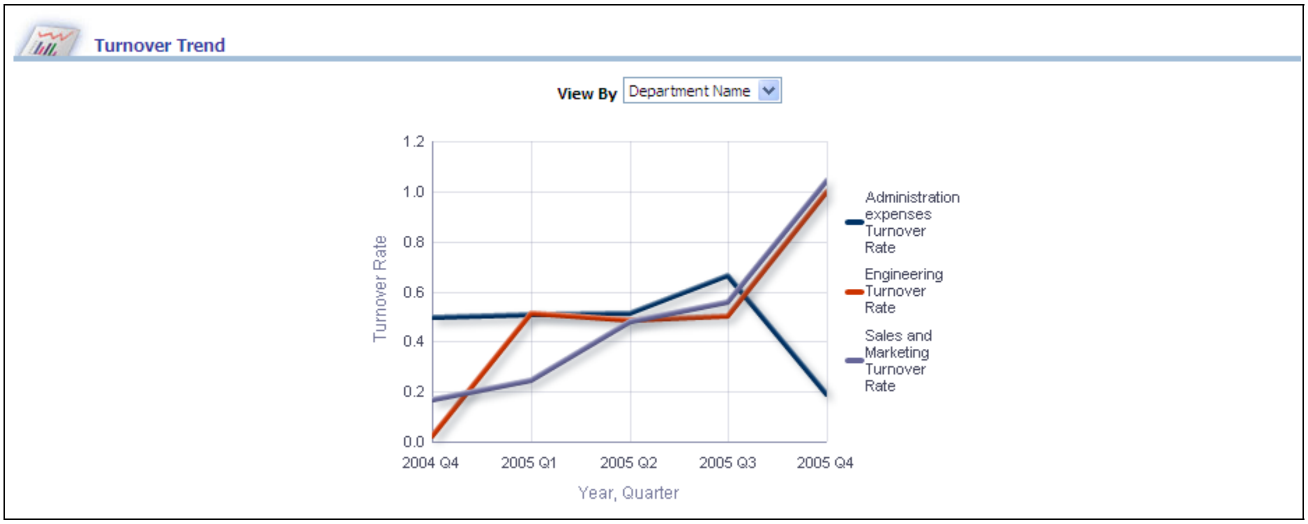
X,Y Axis Data	***View By Filter***
The Headcount Trend graph displays *Snapshot Year, Quarter* data on the x-axis and *Headcount* and *Department* data on the y-axis. The y-axis can also display Location data if you select the value from the View By filter.	Use this filter to view report results by: • *Department Name* (default) • *Location*

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

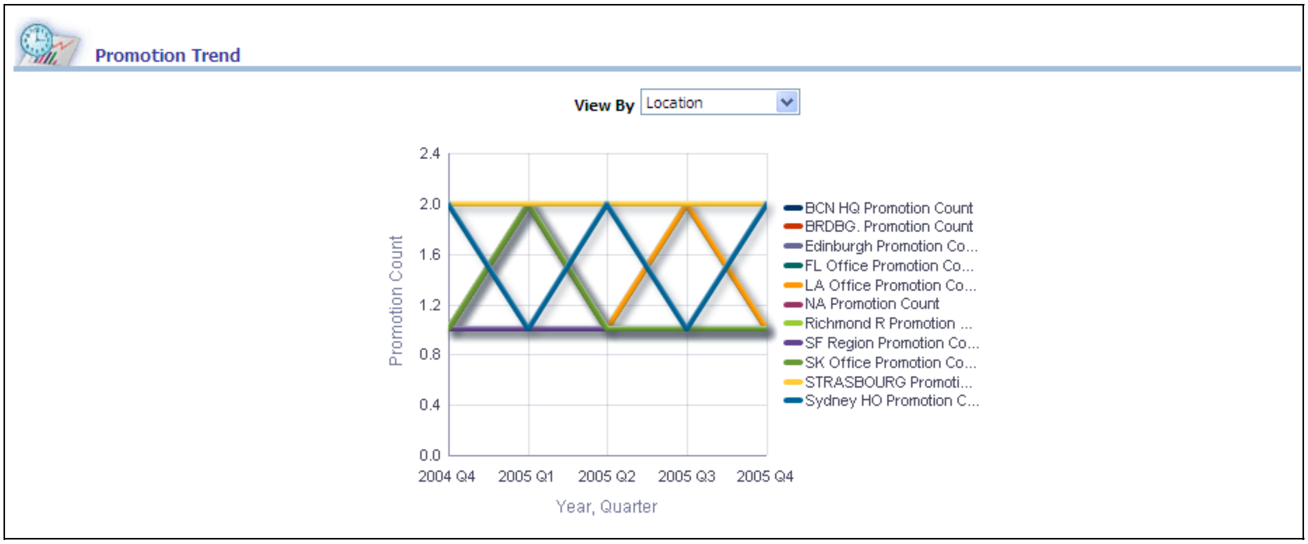
X,Y Axis Data	***View By Filter***
The Turnover Trend graph displays *Year*, *Quarter* data on the x-axis and *Turnover Rate* and *Department* data on the y-axis. The y-axis can also display Location data if you select the value from the View By filter.	Use this filter to view report results by: • *Department Name* (default) • *Location*

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: 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

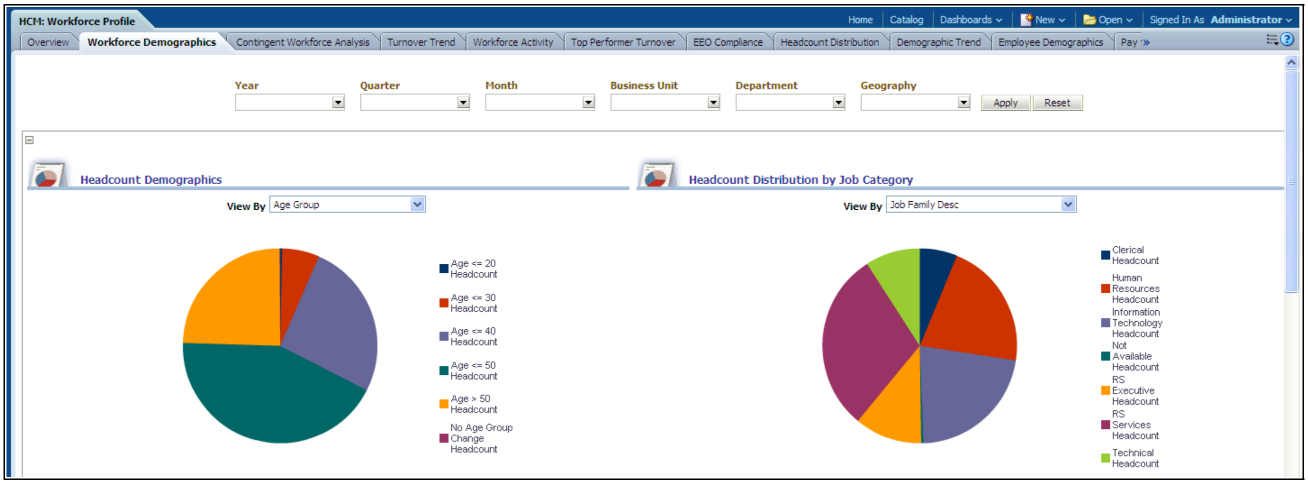
X,Y Axis Data	***View By Filter***
The Promotion Trend graph displays *Year, Quarter* data on the x-axis and *Promotion Count* and *Department* data on the y-axis. The y-axis can also display Location data if you select the value from the View By filter.	Use this filter to view report results by: • *Department Name* (default) • *Location*

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 (Dashboards, HCM: Human Capital Management, HCM: Workforce Profile, Workforce Demographics).

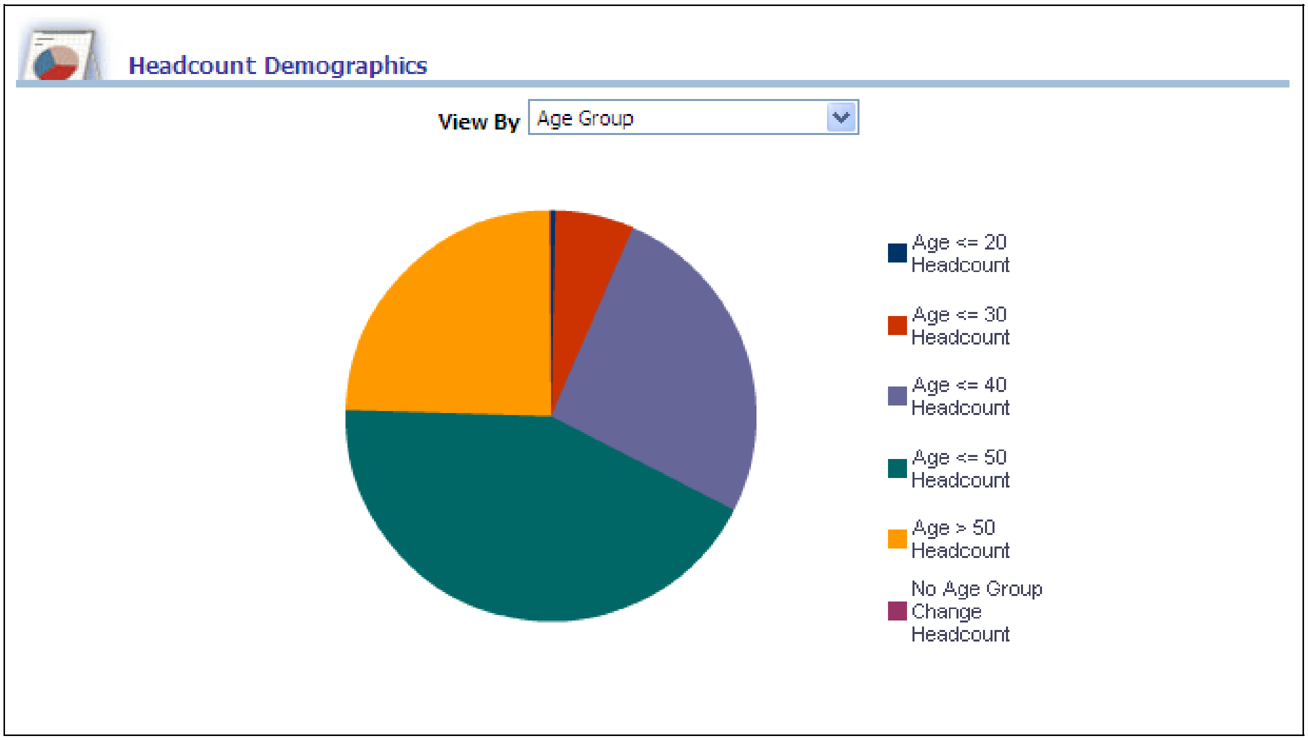


Workforce Demographics page

Usage	***Reports***	***Dashboard Prompt***
Provides a detailed overview of organization headcount demographics	This page is comprised of the following reports: • Headcount Demographics report • Headcount Distribution by Job Category report • Termination Demographics report • Termination Distribution by Job Category report • Promotion Demographics report • Promotion Distribution by Job Category report	Use the Workforce Demographics page prompt to filter page results by: • Year • Quarter • Month • Business Unit • Department Name • Geography

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
The Headcount Demographics pie chart displays *Headcount* data grouped by *Age Group.* Headcount data can also be grouped by any of the following dimensions, depending on your View By filter selection: • *Fairlabor Standards Act Status* • *Service Group* • *Location* • *Department Name* • *Age Group* (default) **Note.** You can click on a pie slice to drill down to headcount data for a particular dimension (such as location).	Use this filter to view report results by: • *Fairlabor Standards Act Status* • *Service Group* • *Location* • *Department Name* • *Age Group* (default)

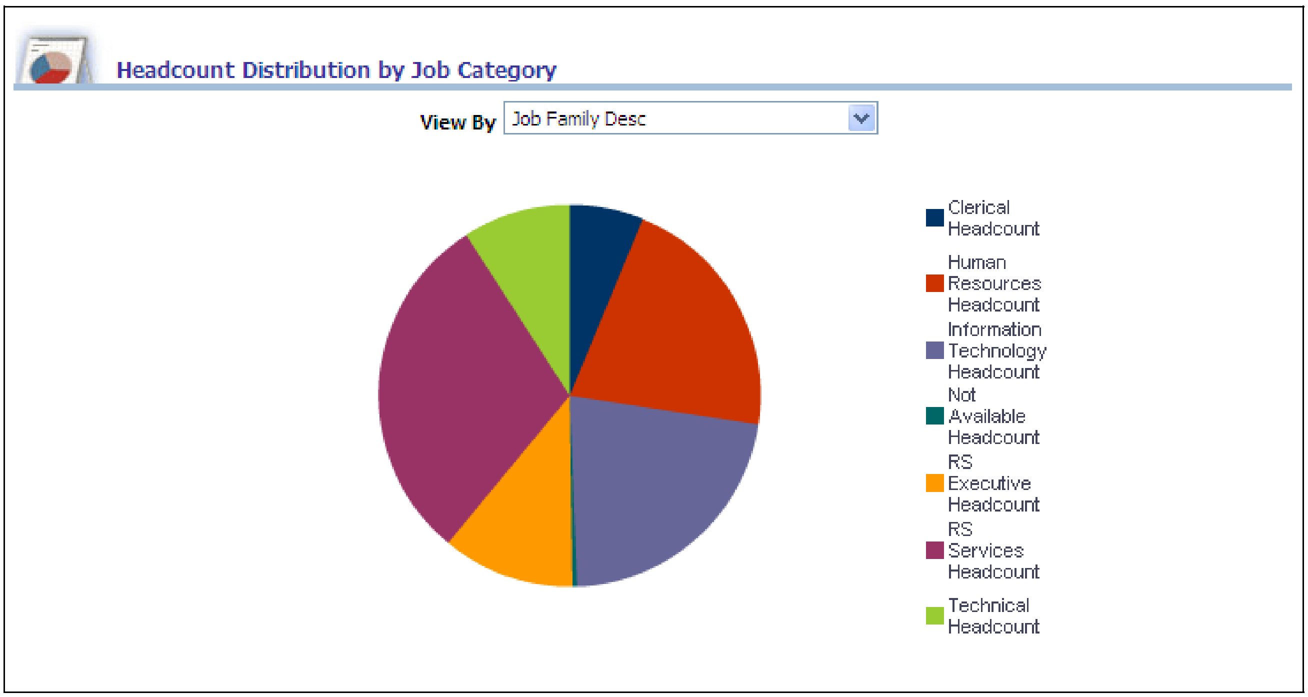
The following table lists the columns and measures used in the Headcount Demographics report.

Report Column / Measure Name	Report Column / Measure Origin
Age Group	Age Group (D_AGRGRP_VW) Dimension (D_DURATION)

Report Column / Measure Name	*Report Column / Measure Origin*
Fairlabor Standards Act Status	Employee Job (D_EMPL_JOB) Dimension
Service Group	Service Group (D_SERVICEGRP_VW) Dimension (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

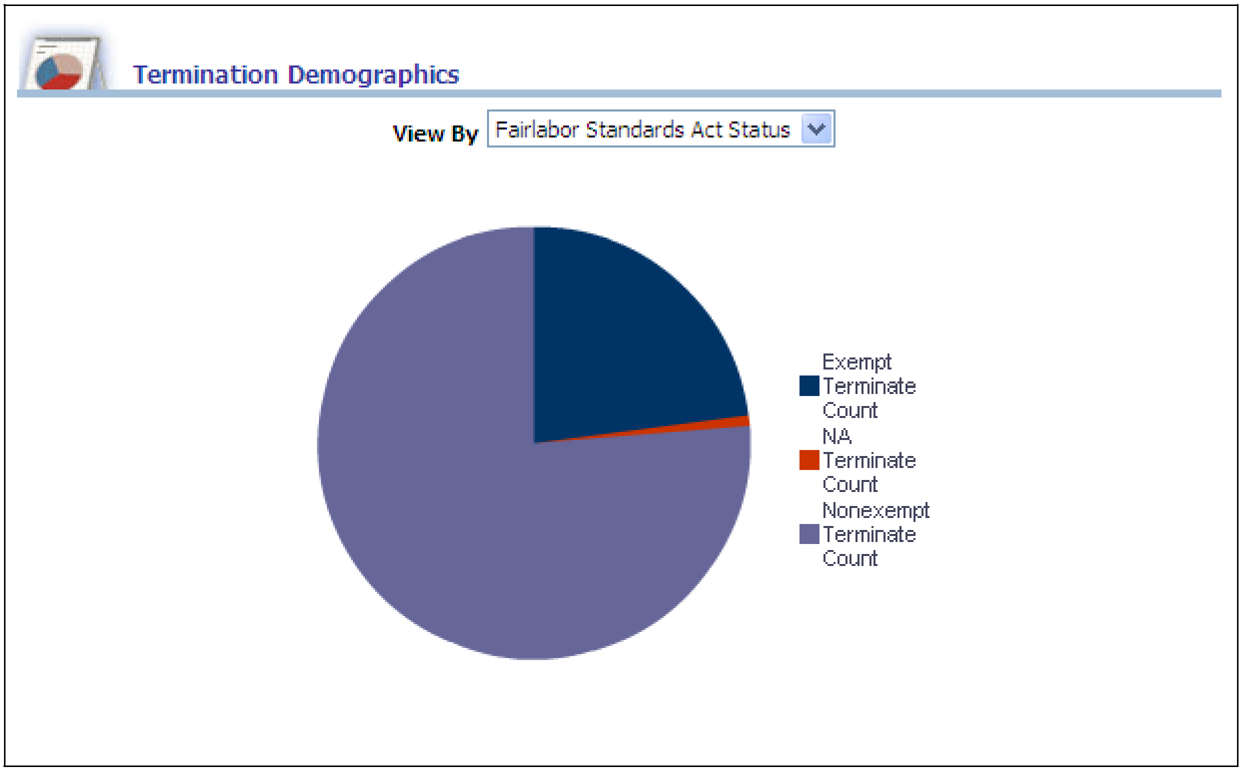
Pie Chart Data	***View By Filter***
The Headcount Distribution by Job Category pie chart displays *Headcount* data grouped by *Job Family Description.* Headcount data can also be grouped by any of the following dimensions, depending on your View By filter selection: • *Equal Employment Opportunity 1 Code* • *Department Name* • *Job Code* • *Job Family Description* (default) • *Location* • *Position* • *Salary Grade Group* **Note.** You can click on a pie slice to drill down to head count data for a particular dimension (such as location).	Use this filter to view report results by: • *Equal Employment Opportunity 1 Code* • *Department Name* • *Job Code* • *Job Family Description* (default) • *Location* • *Position* • *Salary Grade Group*

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

Report Column / Measure Name	***Report Column / Measure Origin***
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

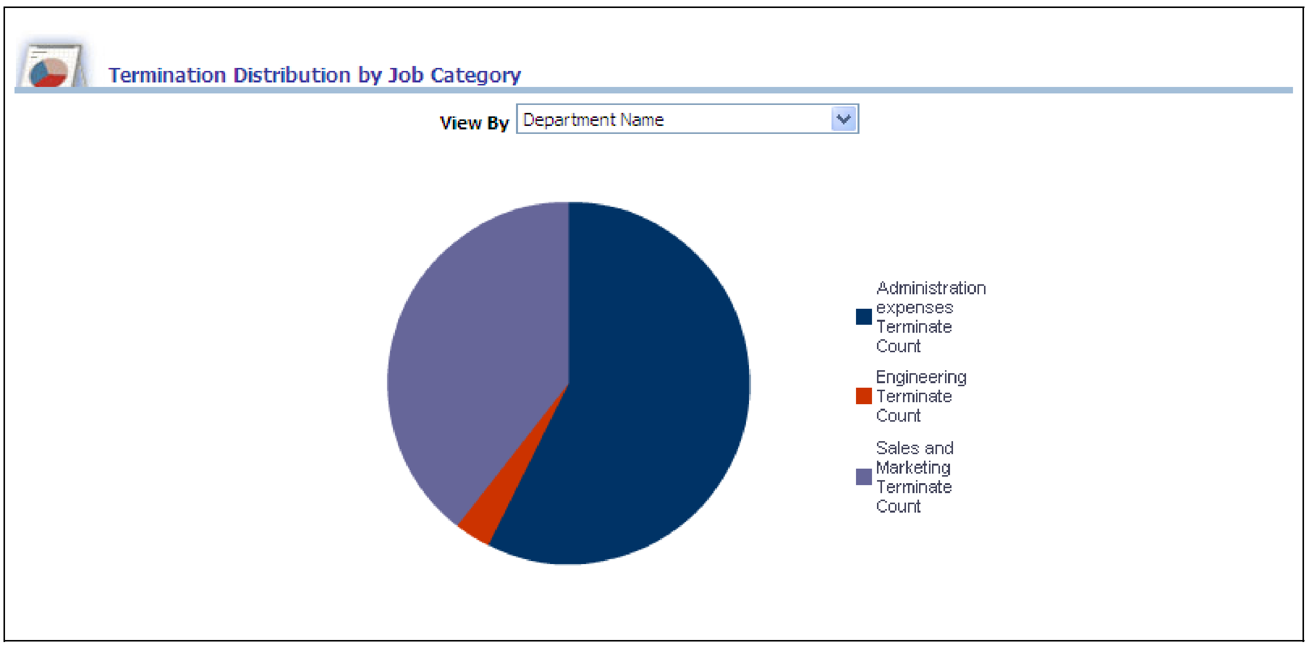
Pie Chart Data	***View By Filter***
The Termination Demographics pie chart displays *Termination Count* data grouped by *Fairlabor Standards Act Status.* Termination count data can also be grouped by any of the following dimensions, depending on your View By filter selection: • *Age Group* • *Department Name* • *Location* • *Service Group* • *Fairlabor Standards Act Status* (default) **Note.** You can click on a pie slice to drill down to termination count data for a particular dimension (such as location).	Use this filter to view report results by: • *Age Group* • *Department Name* • *Location* • *Service Group* • *Fairlabor Standards Act Status* (default)

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

Report Column / Measure Name	***Report Column / Measure Origin***
Age Group	Age Group (D_AGRGRP_VW) Dimension (D_DURATION)
Fairlabor Standards Act Status	Employee Job (D_EMPL_JOB) Dimension
Service Group	Service Group (D_SERVICEGRP_VW) Dimension (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

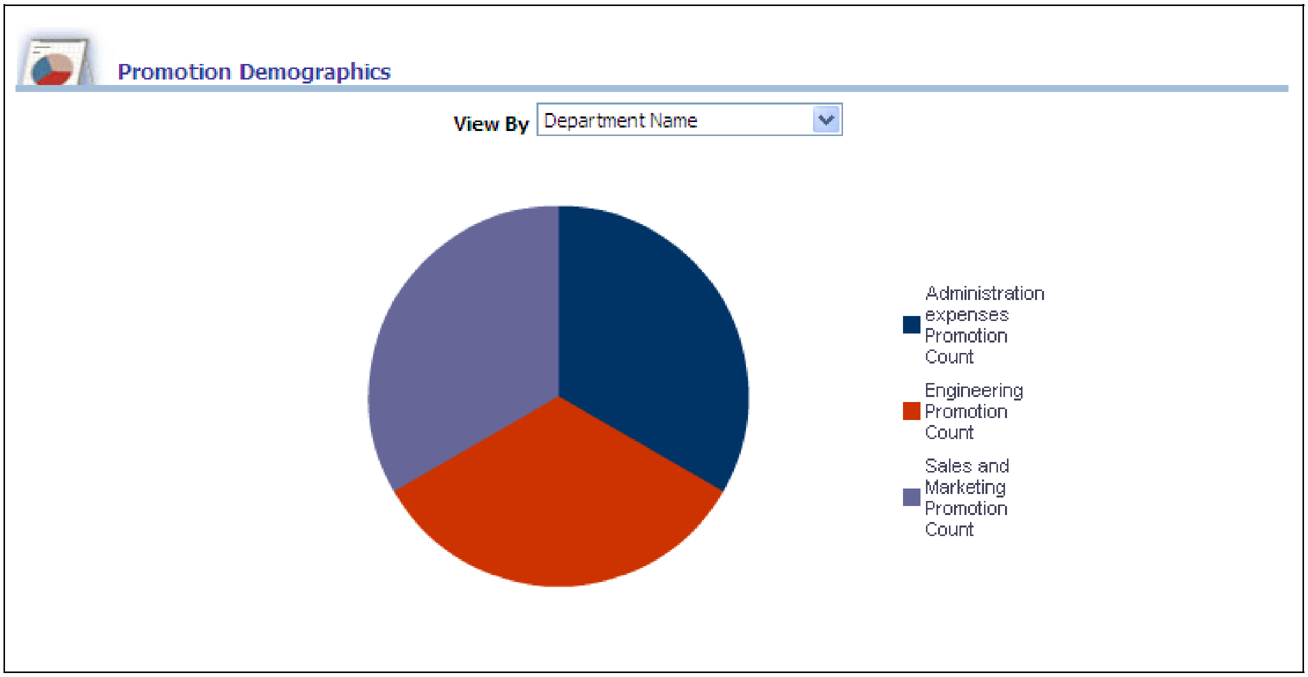
Pie Chart Data	***View By Filter***
The Termination Distribution by Job Category pie chart displays *Termination Count* data grouped by *Department.* Termination count data can also be grouped by any of the following dimensions, depending on your View By filter selection: • *Equal Employment Opportunity 1 Code* • *Department Name* (default) • *Job Code* • *Job Family Description* • *Location* • *Position* • *Salary Grade Group* **Note.** You can click on a pie slice to drill down to termination count data for a particular dimension (such as position).	Use this filter to view report results by: • *Equal Employment Opportunity 1 Code* • *Department Name* (default) • *Job Code* • *Job Family Description* (default) • *Location* • *Position* • *Salary Grade Group*

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

Report Column / Measure Name	***Report Column / Measure Origin***
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***
The Promotion Demographics pie chart displays *Promotion Count* data grouped by *Department.* Promotion count data can also be grouped by any of the following dimensions, depending on your View By filter selection: • *Fairlabor Standards Act Status* • *Service Group* • *Location* • *Department Name* (default) • *Age Group* **Note.** You can click on a pie slice to drill down to promotion count data for a particular dimension (such as age group).	Use this filter to view report results by: • *Fairlabor Standards Act Status* • *Service Group* • *Location* • *Department Name* (default) • *Age Group*

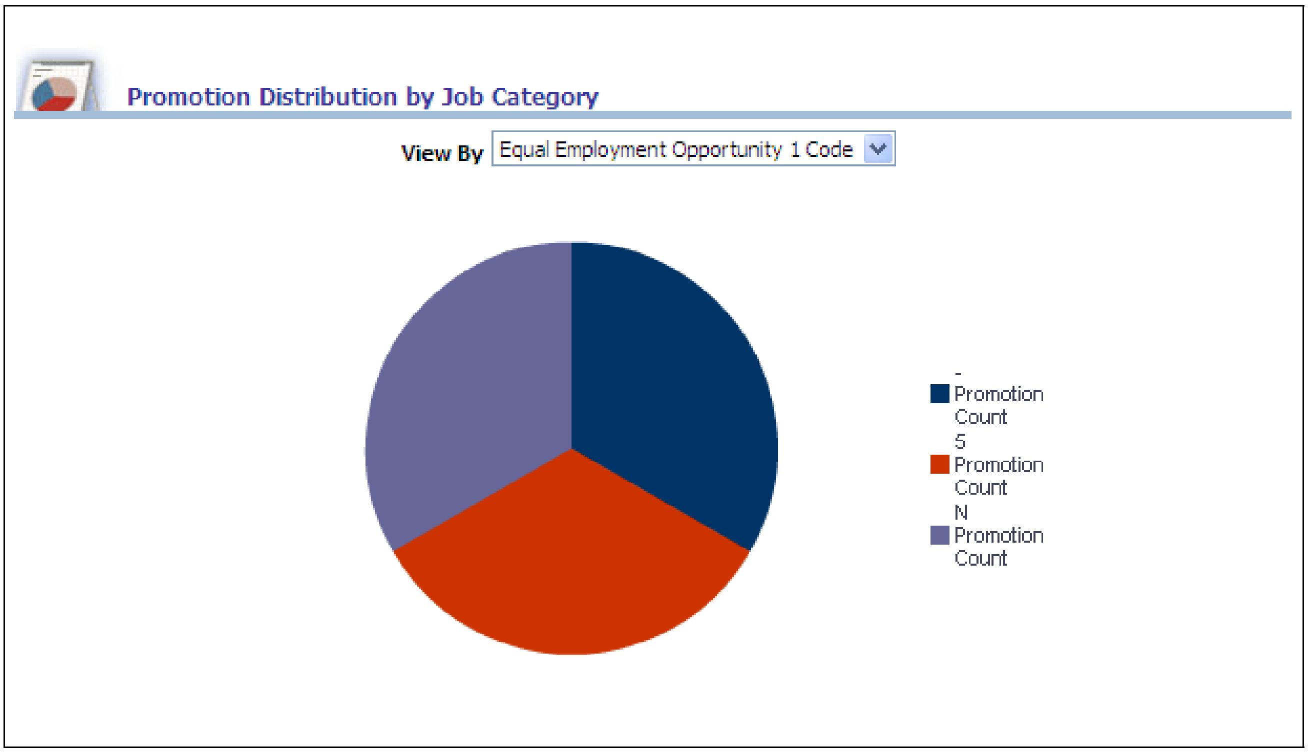
The following table lists the columns and measures used in the Promotion Demographics report.

Report Column / Measure Name	***Report Column / Measure Origin***
Age Group	Age Group (D_AGRGRP_VW) Dimension (D_DURATION)
Fairlabor Standards Act Status	Employee Job (D_EMPL_JOB) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Service Group	Service Group (D_SERVICEGRP_VW) Dimension (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

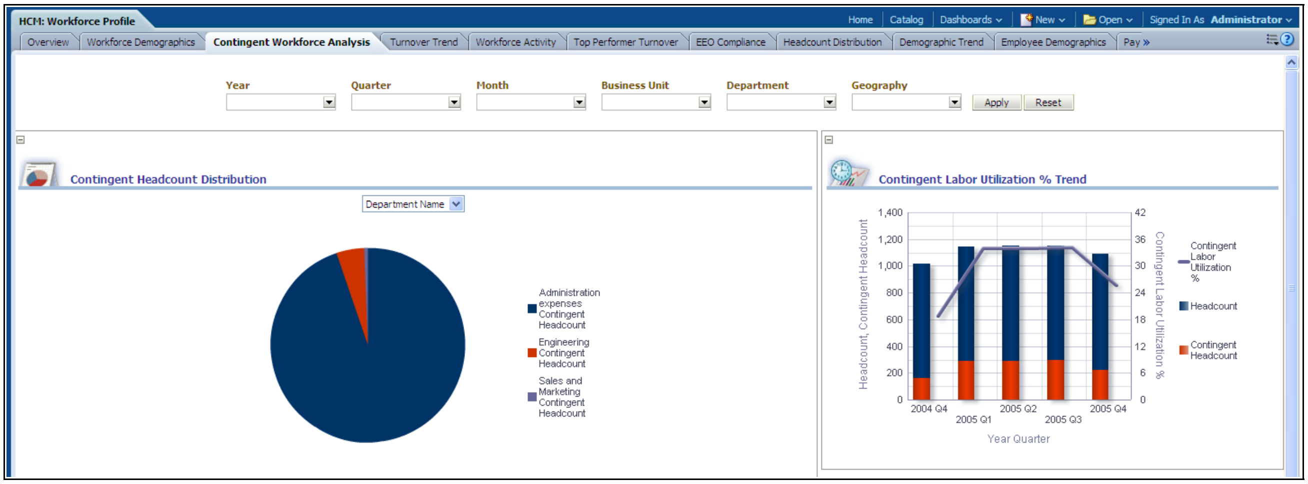
Pie Chart Data	***View By Filter***
The Promotion Distribution by Job Category pie chart displays *Promotion Count* data grouped by *Equal Employment Opportunity 1 Code.* Promotion count data can also be grouped by any of the following dimensions, depending on your View By filter selection: • *Equal Employment Opportunity 1 Code* (default) • *Department Name* • *Job Code* • *Job Family Description* • *Location* • *Position* • *Salary Grade Group* **Note.** You can click on a pie slice to drill down to promotion count data for a particular dimension (such as department).	Use this filter to view report results by: • *Equal Employment Opportunity 1 Code* (default) • *Department Name* • *Job Code* • *Job Family Description* • *Location* • *Position* • *Salary Grade Group*

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

Report Column / Measure Name	***Report Column / Measure Origin***
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 (Dashboards, HCM: Human Capital Management, HCM: Workforce Profile, Contingent Workforce Analysis).

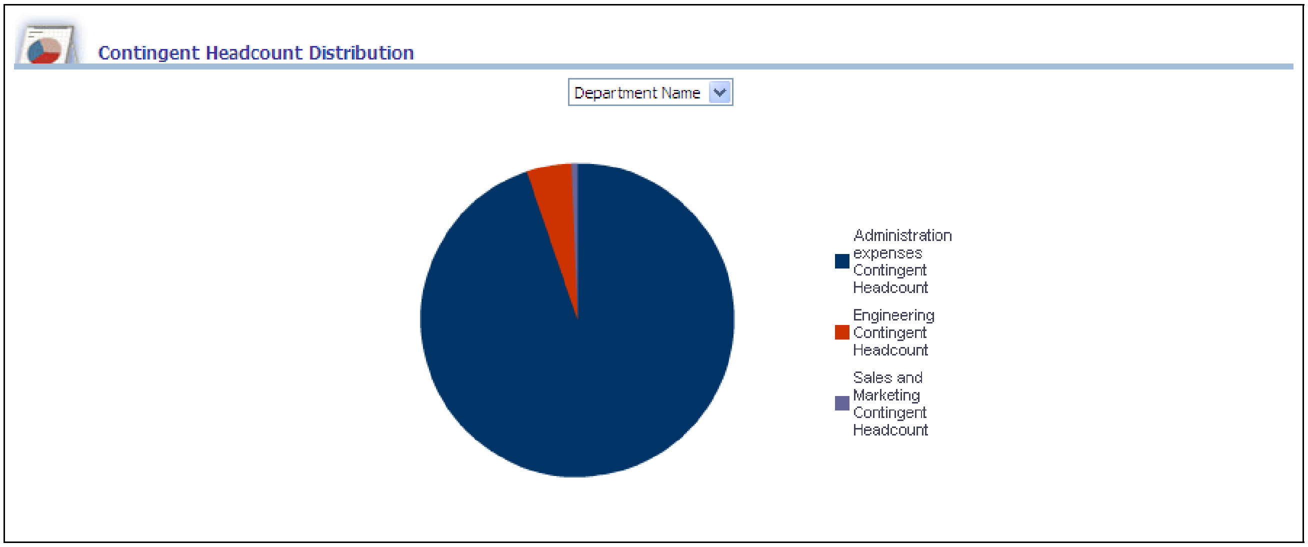


Contingent Workforce Analysis page

Usage	*Reports*	*Dashboard Prompt*
Provides an overview of contingent headcount distribution and labor utilization for your organization.	This page is comprised of the following reports: • Contingent Headcount Distribution report • Contingent Labor Utilization % Trend report	Use the Contingent Workforce Analysis page prompt to filter page results by: • Year • Quarter • Month • Business Unit • Department Name • Geography

Contingent Headcount Distribution Report

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



Contingent Headcount Distribution report

Pie Chart Data	***View By Filter***
The Contingent Headcount Distribution pie chart displays *Contingent Headcount* data grouped by *Department.* Contingent headcount data can also be grouped by any of the following dimensions, depending on your View By filter selection: • *Department* (default) • *Geography* • *Job Family* **Note.** You can click on a pie slice to drill down to contingent headcount data for a particular dimension (such as geography).	Use this filter to view report results by: • *Department* (default) • *Geography* • *Job Family*

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

Report Column / Measure Name	***Report Column / Measure Origin***
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

Report Column / Measure Name	***Report Column / Measure Origin***
Contingent Labor Utilization (percent)	Workforce (F_WORKFORCE) Fact:
Total Contingent Labor Utilization (percent)	Workforce (F_WORKFORCE) Fact: Contingent Headcount / Total Headcount

Contingent Headcount Distribution Details Report

Access the Contingent Headcount Distribution Details report, which provides a detailed analysis of contingent headcount distribution.

Contingent Headcount Distribution Details

	Contingent Headcount	Headcount	Contingent Labor Utilization	Total Contingent Labor Utilization	Total Headcount
Department Name					
Administration expenses	1189	-456	94.7%	162.21%	733
Engineering	58	-15	4.6%	134.88%	43
Sales and Marketing	8	80	0.6%	9.09%	88
Grand Total	**1255**	**-391**	**100.0%**	**145.25%**	**864**

Contingent Headcount Distribution Details report

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.

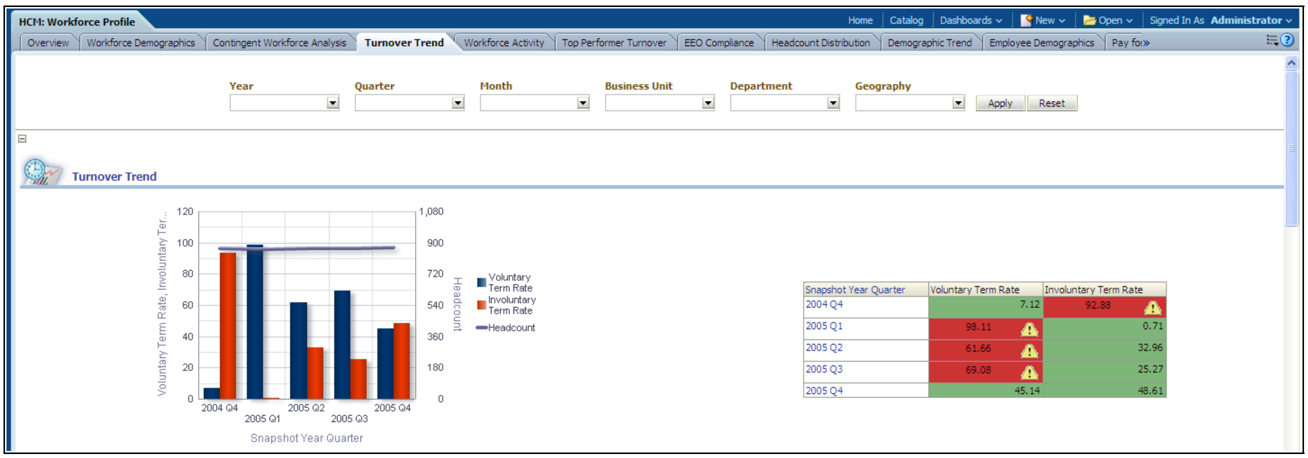
The following table lists the columns and measures used in the Contingent Labor Utilization % Trend report.

Report Column / Measure Name	***Report Column / Measure Origin***
Year	Day (D_DAY) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
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 (Dashboards, HCM: Human Capital Management, HCM: Workforce Profile, Turnover Trend).

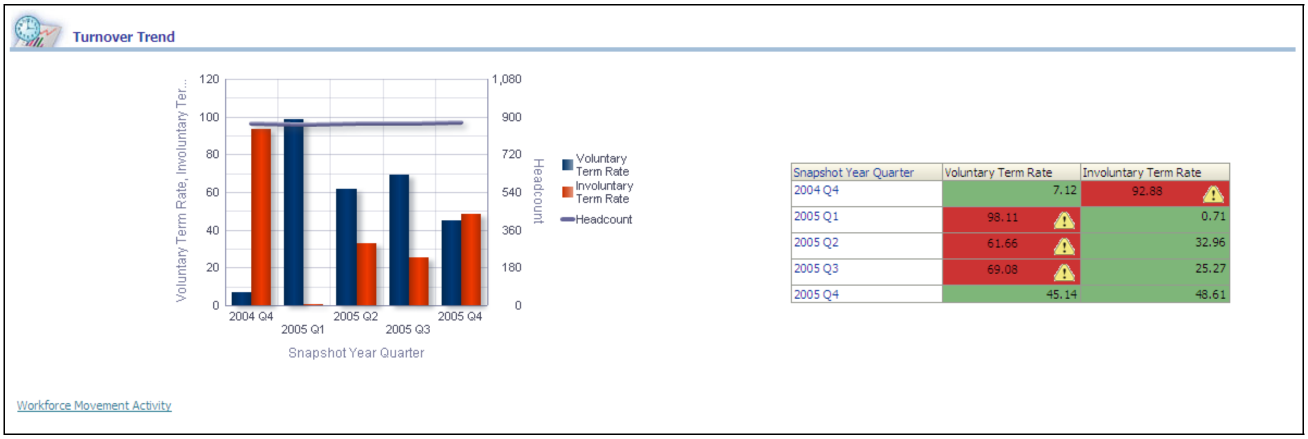


Turnover Trend page

Usage	***Reports***	***Dashboard Prompt***
Provides an overview of turnover and position-change trends for your organization.	This page is comprised of the following reports: • Turnover Trend report • Position Change Trends report • Termination Detail report • Termination Root Cause report • Top Performer Turnover Trend report • Turnover Distribution Analysis report • Turnover Demographics report	Use the Turnover Trend page prompt to filter page results by: • Year • Quarter • Month • Business Unit • Department Name • Geography

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 *Headcount 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.

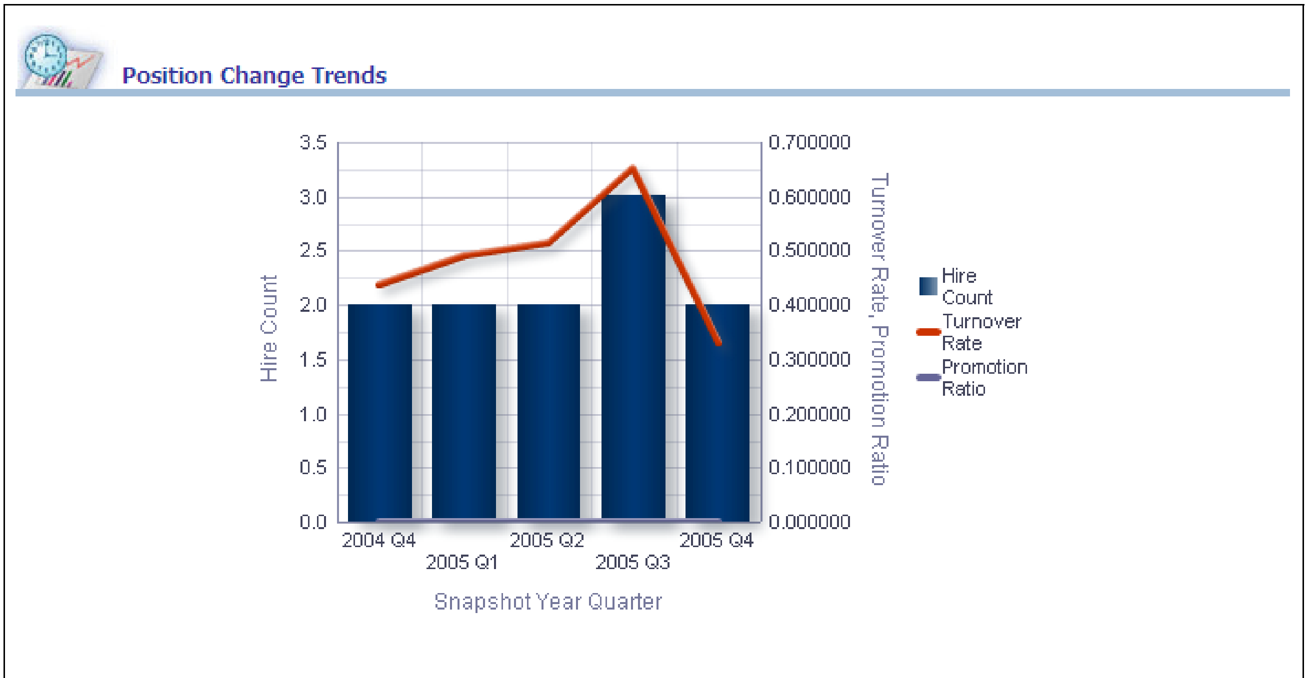
The following table lists the columns and measures used in the Turnover Trend report.

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 This measure is calculated by dividing the sum of Voluntary count by sum of Terminate count when terminate count not equal to 0: 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 This measure is calculated by dividing sum of Involuntary count by sum of Termination count when terminate count not equal to 0: Case when [(IF Fact Workforce.TERMINATE_COUNT <> 0 AND Dimension Action.WA_VOLUNTARY_FLAG = 'I' 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.

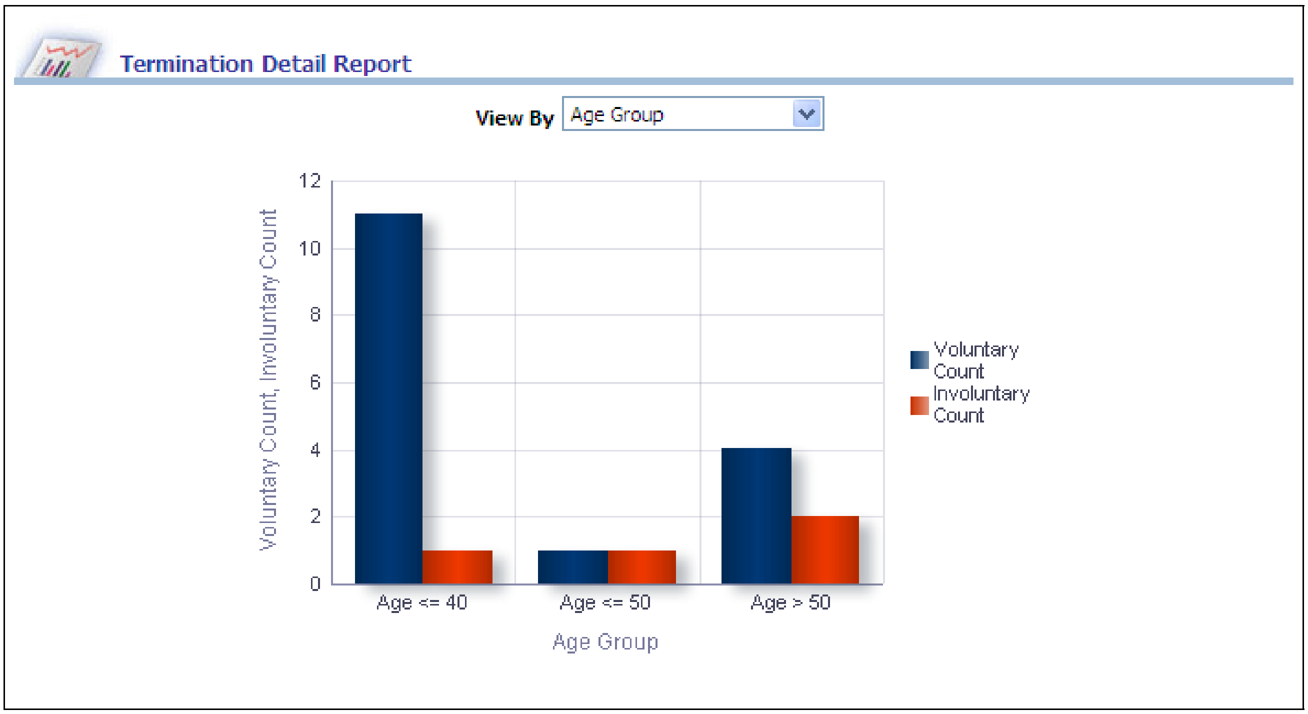
The following table lists the columns and measures used in the Position Change Trends report.

Report Column / Measure Name	***Report Column / Measure Origin***
Snapshot Year	Day (D_DAY) Dimension

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

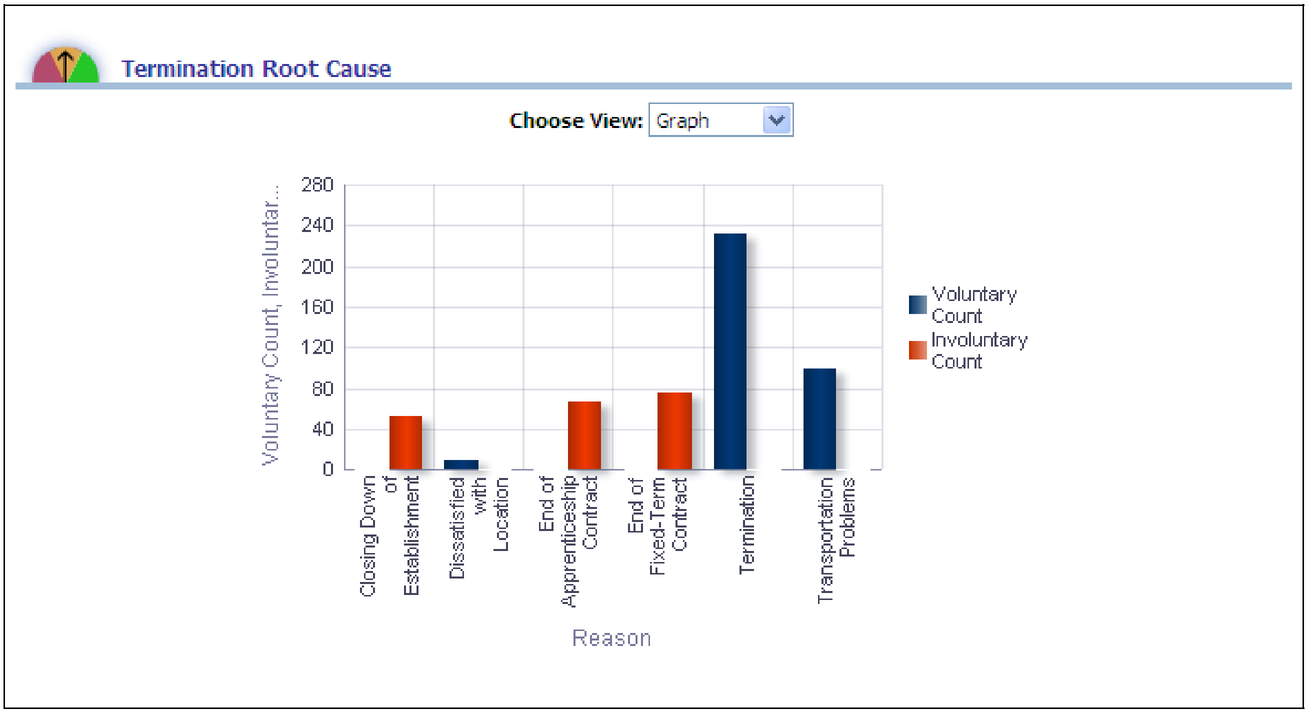
X,Y Axis Data	***View By Filter***
The Termination Detail graph displays *Age Group* data on the x-axis and *Voluntary Count* and *Involuntary Count* data on the y-axis. The x-axis can also display any of the following dimensions, depending on your View By filter selection: • *Job Function* • *Appraisal Review Rating* • *Service Group* • *Age Group* (default) **Note.** You can on graph data to review drill down data for a particular dimension (such as job function).	Use this filter to view report results by: • *Job Function* • *Appraisal Review Rating* • *Service Group* • *Age Group* (default)

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

Report Column / Measure Name	***Report Column / Measure Origin***
Job Function	Jobcode (D_JOBCODE) Dimension
Appraisal Review Rating	Employee Appraisal (D_EMPL_APRSL) Dimension
Service Group	Service Group (D_SERVICEGRP_VW) Dimension (D_DURATION)
Age Group	Age Group (D_AGRGRP_VW) Dimension (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

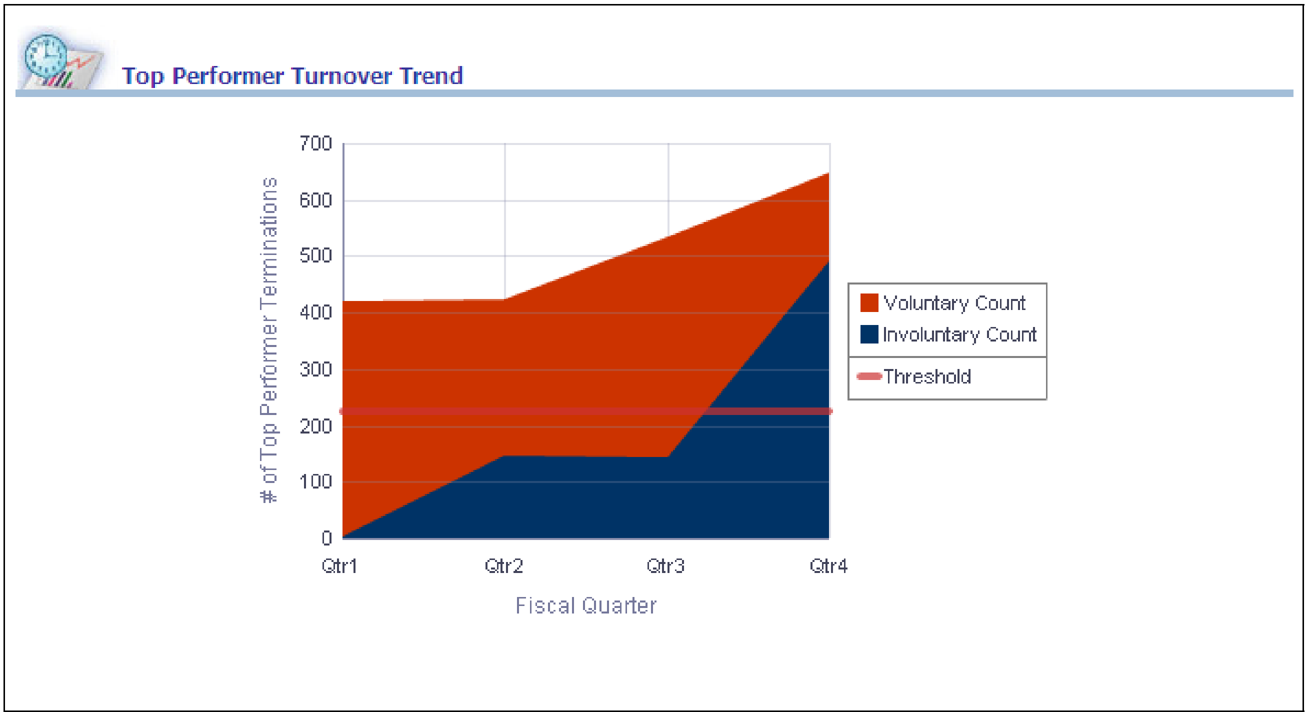
X,Y Axis Data	*Choose View Filter*
In chart view, the Termination Root Cause graph displays *Reason* data on the x-axis and *Voluntary Count* and *Involuntary Count* data on the y-axis. In pivot table view, the same data is displayed in table format, but includes the addition of *Department* data.	Use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

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
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.

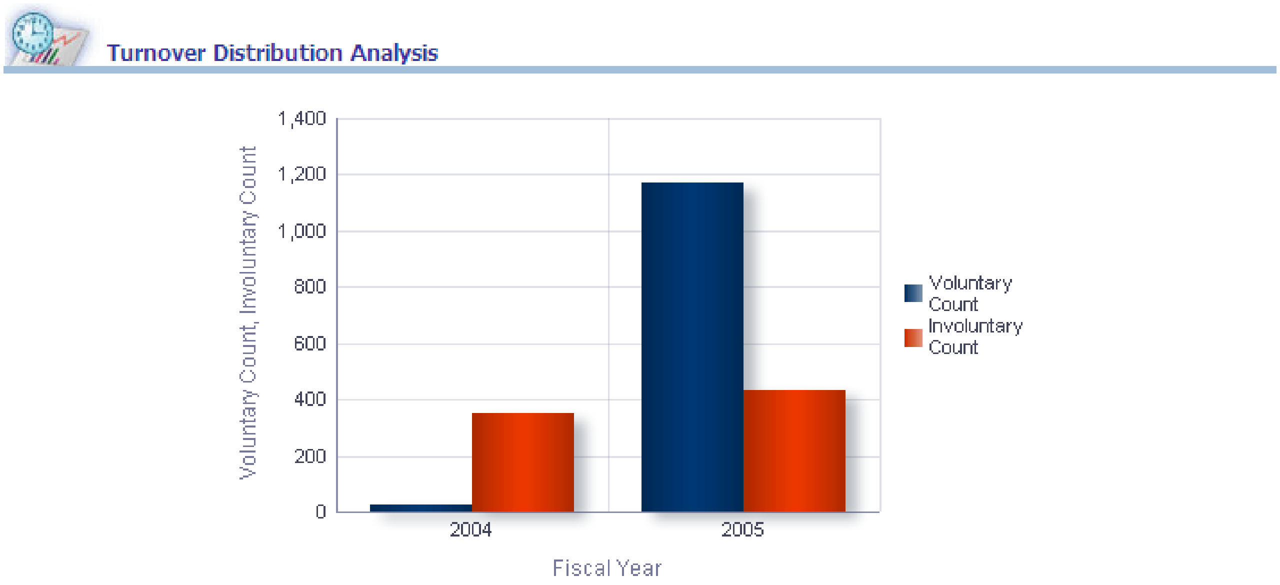
Note. You define the report threshold value in the chart view of the report. In chart view, click *Axis Scaling.* In the new window click *Edit Scale Markers.* In the new window, edit the threshold value per your business requirements.

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
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.



Fiscal Year	Department Name	Voluntary Count	Involuntary Count
2004	Administration expenses	25	339
	Engineering	0	1
	Sales and Marketing	2	12
2004 Total		**27**	**352**
2005	Administration expenses	1,045	332
	Engineering	56	43
	Sales and Marketing	67	55
2005 Total		**1168**	**430**

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.

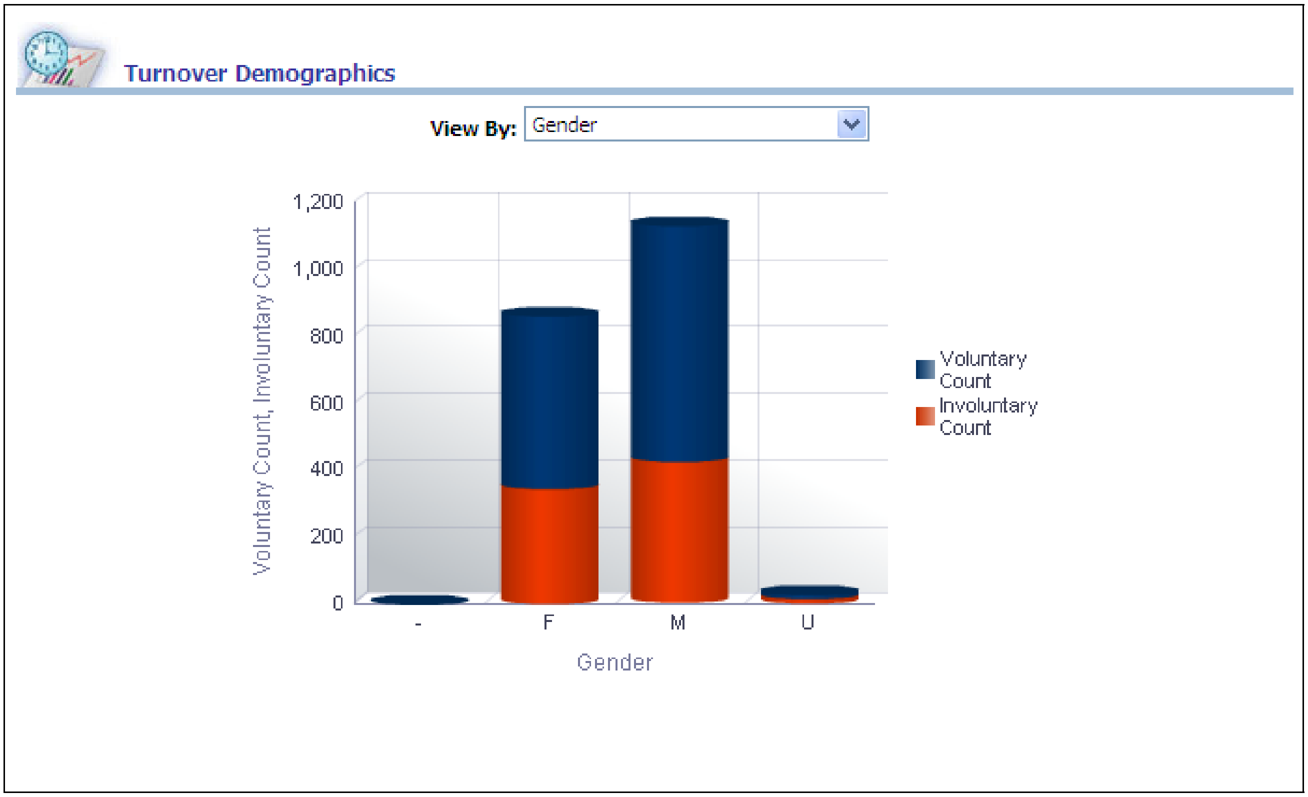
The following table lists the columns and measures used in the Turnover Distribution Analysis report.

Report Column / Measure Name	***Report Column / Measure Origin***
Fiscal Year	Day (D_DAY) Dimension
Department	Department (D_DEPT) Dimension

Report Column / Measure Name	*Report Column / Measure Origin*
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

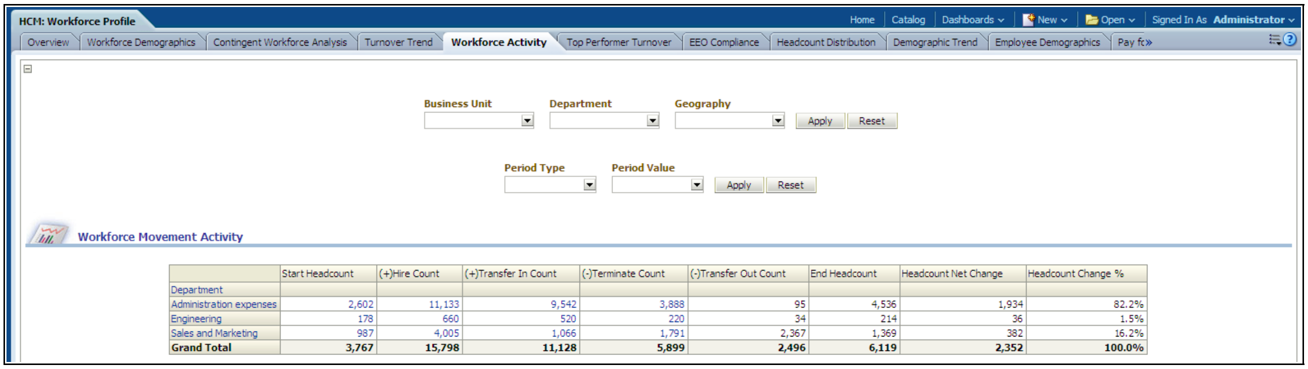
X,Y Axis Data	***View By Filter***
The Turnover Demographics graph displays *Gender* data on the x-axis and *Voluntary Count* and *Involuntary Count* data on the y-axis. The x-axis can also display any of the following dimensions, depending on your View By filter selection: • *Employee Type* • *Position Security Clearance Code* • *Age* • *Employee High Potential Flag* • *Ethnic Group* • *Gender* (default) **Note.** You can click on graph data to review drill down data for a particular dimension (such as gender or age).	Use this filter to view report results by: • *Employee Type* • *Position Security Clearance Code* • *Age* • *Employee High Potential Flag* • *Ethnic Group* • *Gender* (default)

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

Report Column / Measure Name	***Report Column / Measure Origin***
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	This flag uses a *Y* or *N* value, based on Higher Education Level Code (HI_EDU_LVL_CD) values, which include: • *J* (Doctorate Academic) • *K* (Doctorate Professional) • *L* (Post Doctorate) 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.
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 (Dashboards, HCM: Human Capital Management, HCM: Workforce Profile, Workforce Activity).



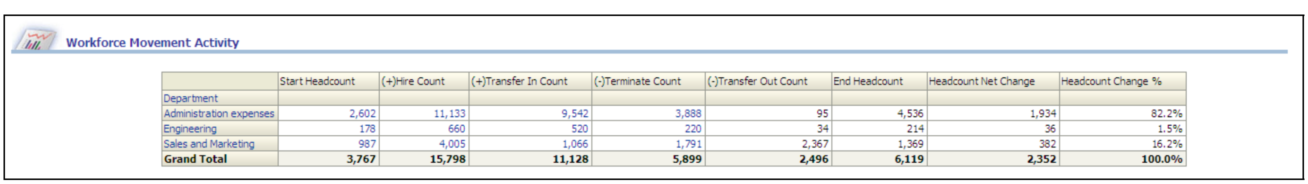
	Start Headcount	(+)Hire Count	(+)Transfer In Count	(-)Terminate Count	(-)Transfer Out Count	End Headcount	Headcount Net Change	Headcount Change %
Department								
Administration expenses	2,602	11,133	9,542	3,888	95	4,536	1,934	82.2%
Engineering	178	660	520	220	34	214	36	1.5%
Sales and Marketing	987	4,005	1,066	1,791	2,367	1,369	382	16.2%
Grand Total	**3,767**	**15,798**	**11,128**	**5,899**	**2,496**	**6,119**	**2,352**	**100.0%**

Workforce Activity page

Usage	***Dashboard Prompt***
Provides you with an overview of workforce movement for your organization, such as new hires, transfers, and terminations.	Use the Workforce Activity page prompt to filter page results by: • Business Unit • Department • Geography • Period Type • Period Value

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.



	Start Headcount	(+)Hire Count	(+)Transfer In Count	(-)Terminate Count	(-)Transfer Out Count	End Headcount	Headcount Net Change	Headcount Change %
Department								
Administration expenses	2,602	11,133	9,542	3,888	95	4,536	1,934	82.2%
Engineering	178	660	520	220	34	214	36	1.5%
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Grand Total	**3,767**	**15,798**	**11,128**	**5,899**	**2,496**	**6,119**	**2,352**	**100.0%**

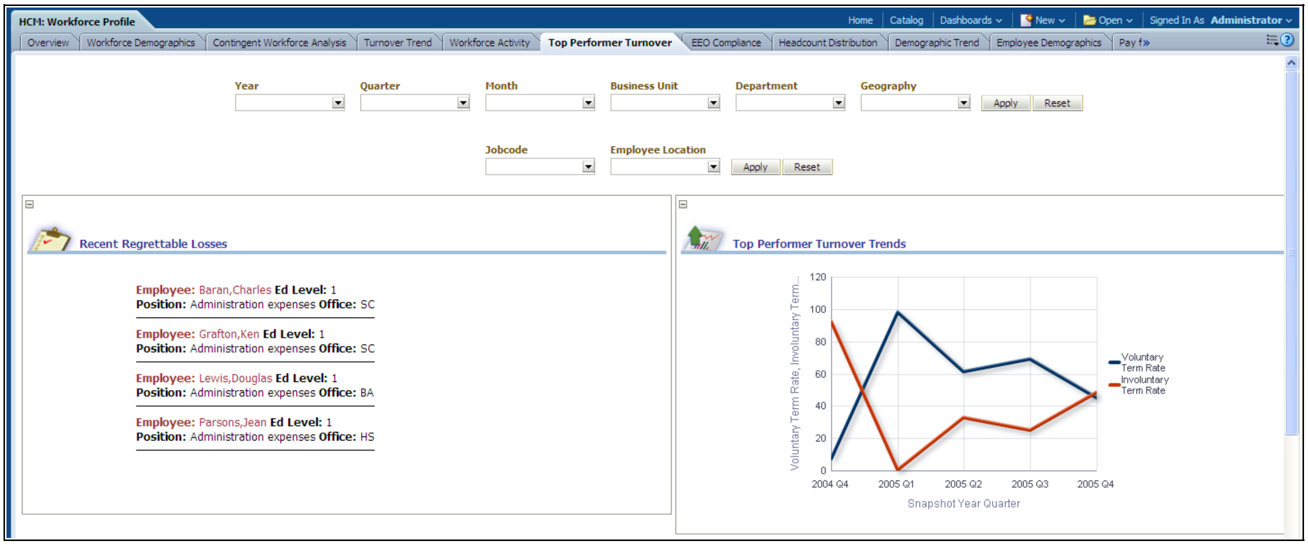
Workforce Movement Activity report

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

Report Column / Measure Name	***Report Column / Measure Origin***
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: (Headcount Net Change / Grand Total Headcount Net Change) * 100

Using the Workforce Profile Dashboard - Top Performer Turnover Page

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

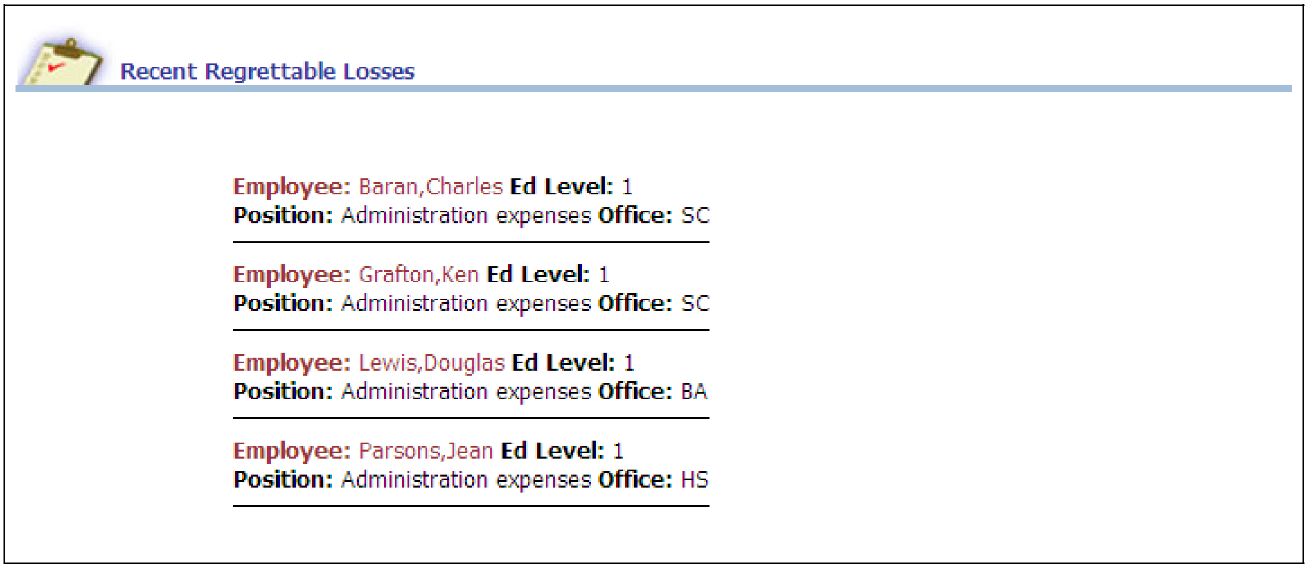


Top Performer Turnover page

Usage	***Reports***	***Dashboard Prompt***
Provides an overview of key turnover metrics for top performers in your organization, such as recent losses and trends.	This page is comprised of the following reports: • Recent Regrettable Losses report • Top Performer Turnover Trends report • Top Performer At Risk report	Use the Top Performer Turnover page prompt to filter page results by: • Year • Quarter • Month • Business Unit • Department Name • Geography • Job Code • Employee Location

Recent Regrettable Losses Report

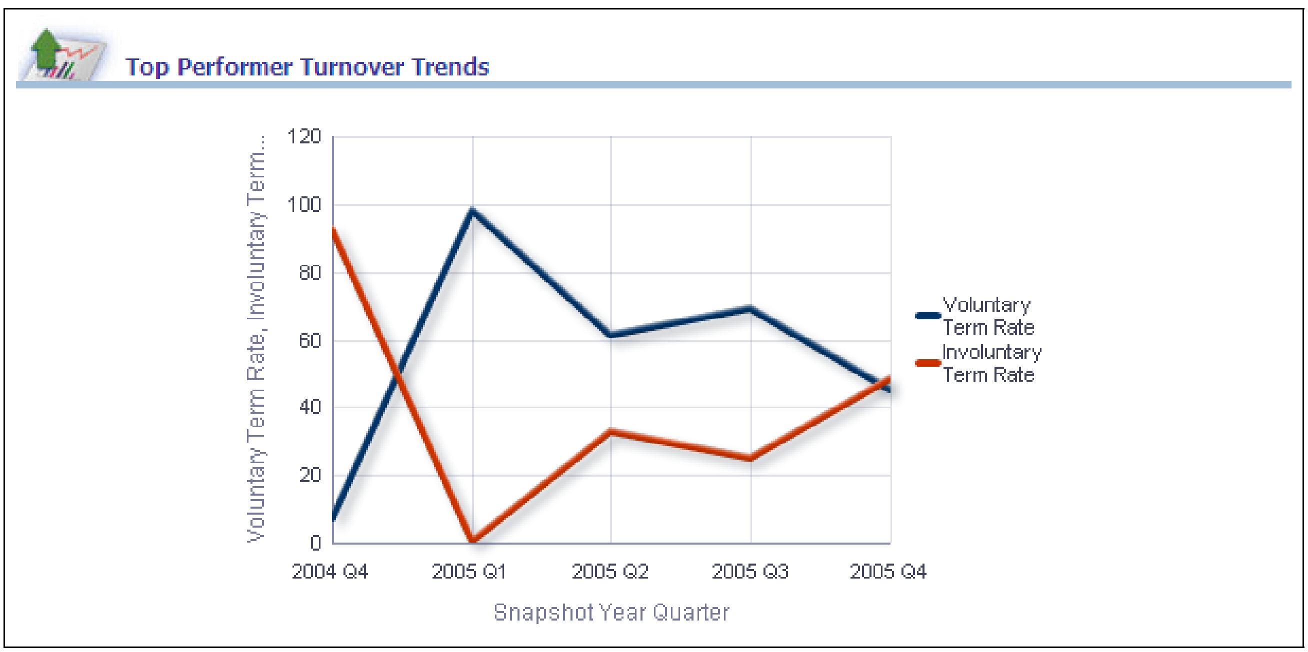
Access the Recent Regrettable Losses report, which displays information about employees that have recently left the organization.



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.

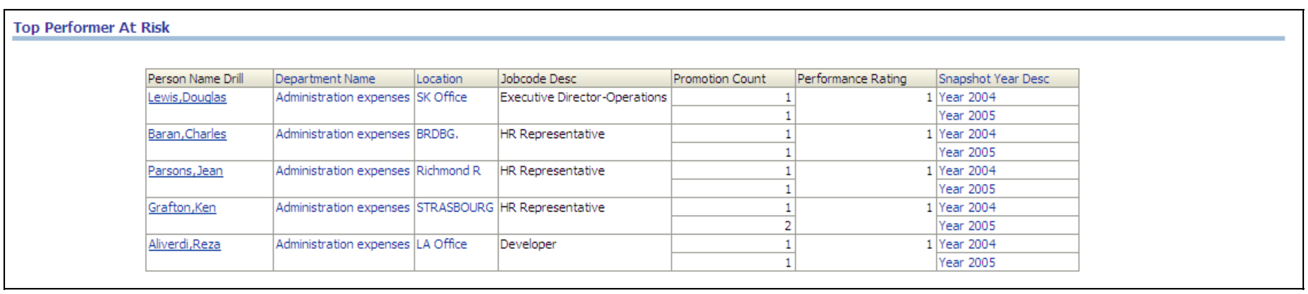
Note. You can click on graph data to review drill down data for a particular year or quarter.

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 This measure is calculated by dividing the sum of Voluntary count by sum of Terminate count when terminate count not equal to 0: 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.
Involuntary Term Rate	Workforce (F_WORKFORCE) Fact This measure is calculated by dividing sum of Involuntary count by sum of Termination count when terminate count not equal to 0: Case when [(IF Fact Workforce.TERMINATE_COUNT <> 0 AND Dimension Action.WA_VOLUNTARY_FLAG = 'I' then Fact Workforce.TERMINATE_COUNT else 0) * 100 / nullif (Fact Workforce.TERMINATE_COUNT,0)] else 0.

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
Lewis,Douglas	Administration expenses	SK Office	Executive Director-Operations	1	1	Year 2004
				1		Year 2005
Baran,Charles	Administration expenses	BRDBG.	HR Representative	1	1	Year 2004
				1		Year 2005
Parsons,Jean	Administration expenses	Richmond R	HR Representative	1	1	Year 2004
				1		Year 2005
Grafton,Ken	Administration expenses	STRASBOURG	HR Representative	1	1	Year 2004
				2		Year 2005
Aliverdi,Reza	Administration expenses	LA Office	Developer	1	1	Year 2004
				1		Year 2005

Top Performer At Risk report

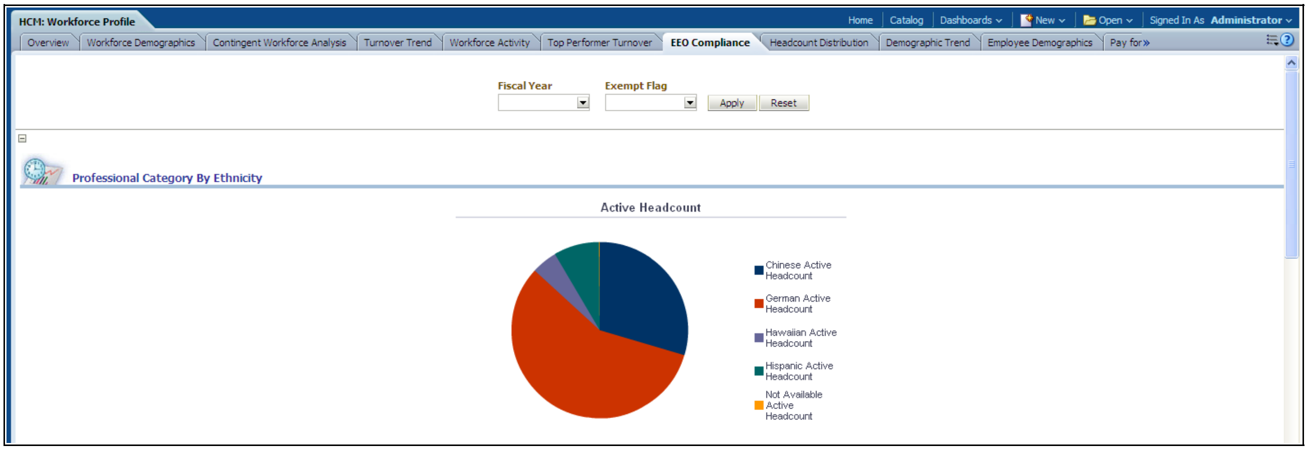
You can click any person name, department name, or location on the graph to review drill down data.

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

Report Column / Measure Name	***Report Column / Measure Origin***
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 (Dashboards, HCM: Human Capital Management, HCM: Workforce Profile, EEO Compliance).

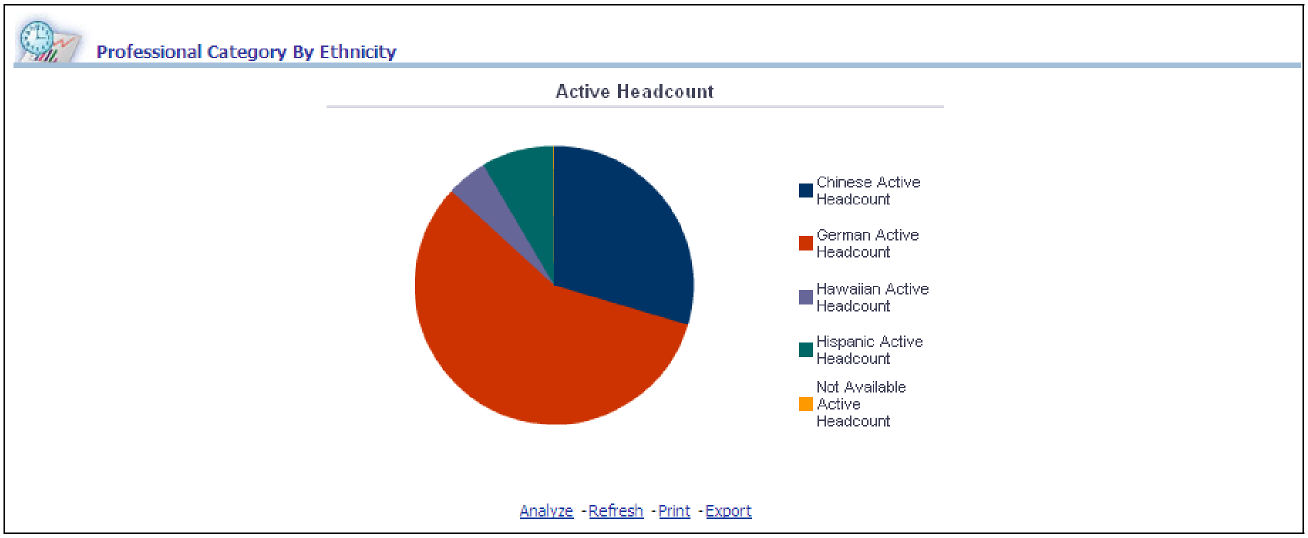


EEO Compliance pag

Usage	***Reports***	***Dashboard Prompt***
Provides an overview of equal employment opportunity metrics for your organization by ethnicity, gender, and minority group.	This page is comprised of the following reports: • Professional Category By Ethnicity report • Minority Representation by Job Category report • Female Representation By Job Category report	Use the EEO Compliance page prompt to filter page results by *Fiscal Year*.

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.*

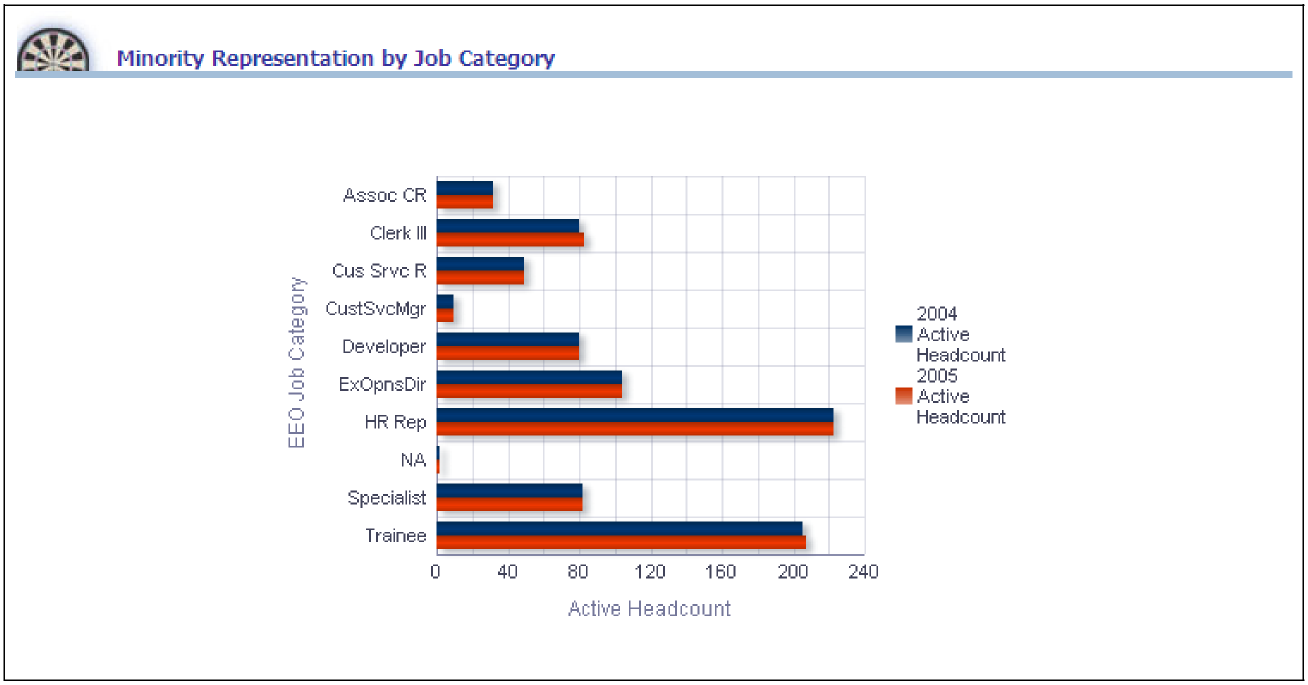
Note. You can click on a pie slice to drill down to active headcount data for a particular ethnic group.

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, part 1

Fiscal Year	EEO Job Category	Ethnic Group	Active Headcount
2004	Assoc CR	Chinese	6
		German	10
		Hawaiian	1
		Hispanic	15
	Assoc CR Total		**32**
	Clerk III	Chinese	26
		German	49
		Hawaiian	5
	Clerk III Total		**80**
	Cus Srvc R	Chinese	17
		German	31
		Hawaiian	1
	Cus Srvc R Total		**49**
	CustSvcMgr	German	9
		Hawaiian	1
	CustSvcMgr Total		**10**
	Developer	Chinese	26
		German	50
		Hawaiian	4
	Developer Total		**80**
	ExOpnsDir	Chinese	26
		German	65
		Hawaiian	13
	ExOpnsDir Total		**104**
	HR Rep	Chinese	70
		German	140
		Hawaiian	13
	HR Rep Total		**223**
	NA	Hispanic	1
		Not Available	1
	NA Total		**2**
	Specialist	Chinese	11
		German	15

Rows 1 - 25

Minority Representation by Job Category report, part 2

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.

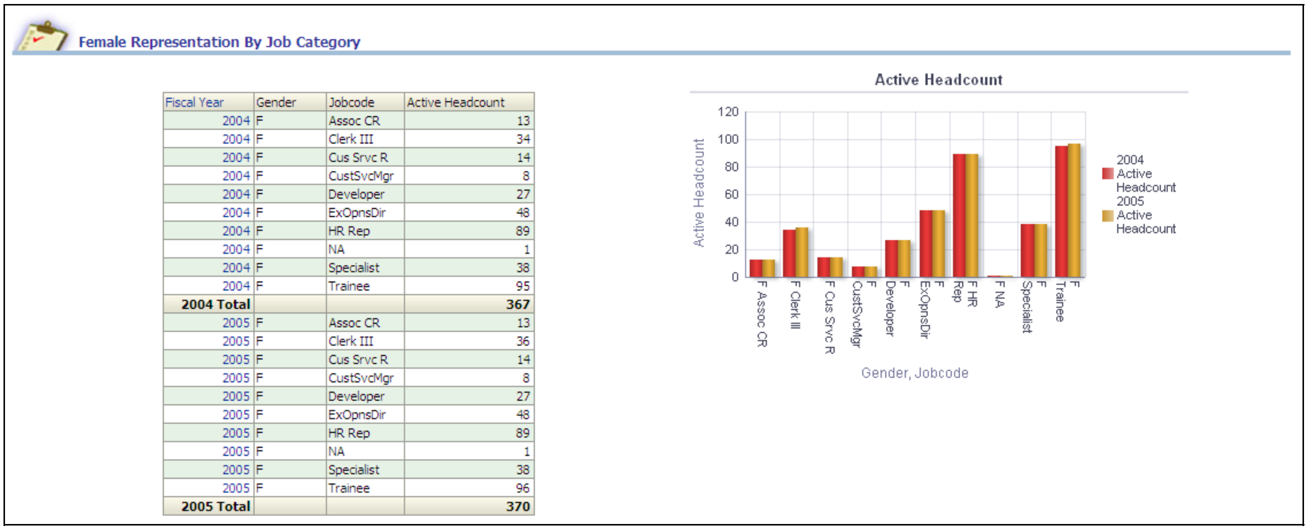
The following table lists the columns and measures used in the Minority Representation by Job Category report.

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

Report Column / Measure Name	***Report Column / Measure Origin***
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.



Fiscal Year	Gender	Jobcode	Active Headcount
2004	F	Assoc CR	13
2004	F	Clerk III	34
2004	F	Cus Srvc R	14
2004	F	CustSvcMgr	8
2004	F	Developer	27
2004	F	ExOpnsDir	48
2004	F	HR Rep	89
2004	F	NA	1
2004	F	Specialist	38
2004	F	Trainee	95
2004 Total			**367**
2005	F	Assoc CR	13
2005	F	Clerk III	36
2005	F	Cus Srvc R	14
2005	F	CustSvcMgr	8
2005	F	Developer	27
2005	F	ExOpnsDir	48
2005	F	HR Rep	89
2005	F	NA	1
2005	F	Specialist	38
2005	F	Trainee	96
2005 Total			**370**

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.

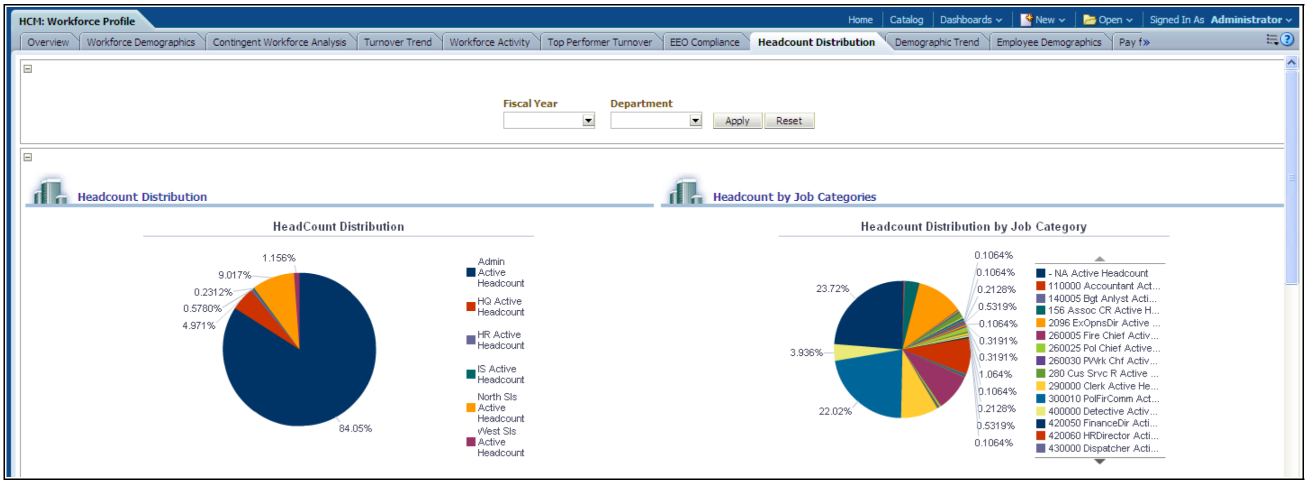
Note. You can click on graph data to review drill down data for a particular job code and year.

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 (Dashboards, HCM: Human Capital Management, HCM: Workforce Profile, Headcount Distribution).

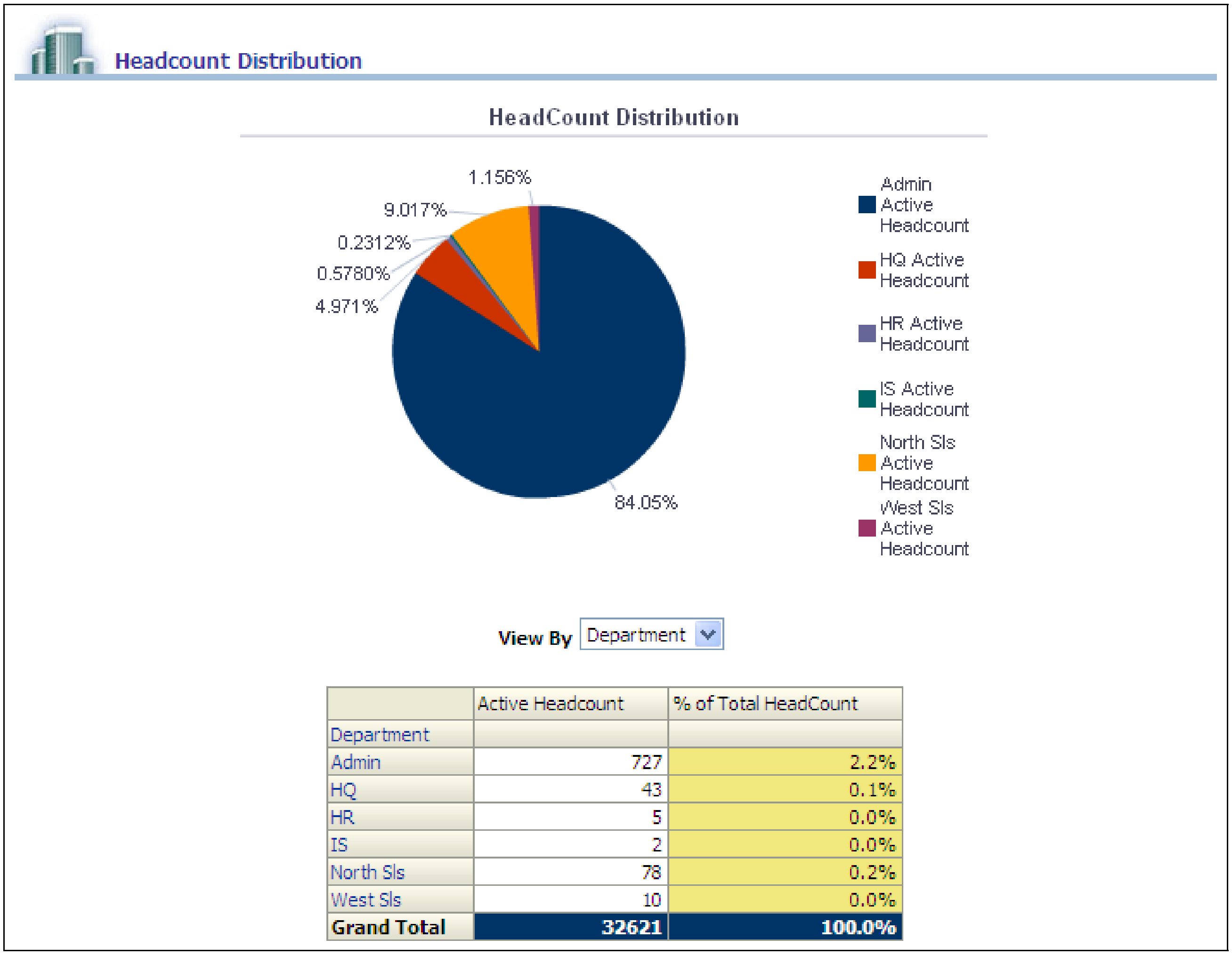


Headcount Distribution page

Usage	*Reports*	*Dashboard Prompt*
Provides an overview of headcount distribution for your organization by department and job category, as well as headcount trends.	This page is comprised of the following reports: • Headcount Distribution report • Headcount by Job Categories report • Organization Headcount Trend report	Use the Headcount Distribution page prompt to filter page results by: • Fiscal Year • Department

Headcount Distribution Report

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



	Active Headcount	% of Total HeadCount
Department		
Admin	727	2.2%
HQ	43	0.1%
HR	5	0.0%
IS	2	0.0%
North Sls	78	0.2%
West Sls	10	0.0%
Grand Total	**32621**	**100.0%**

Headcount Distribution report

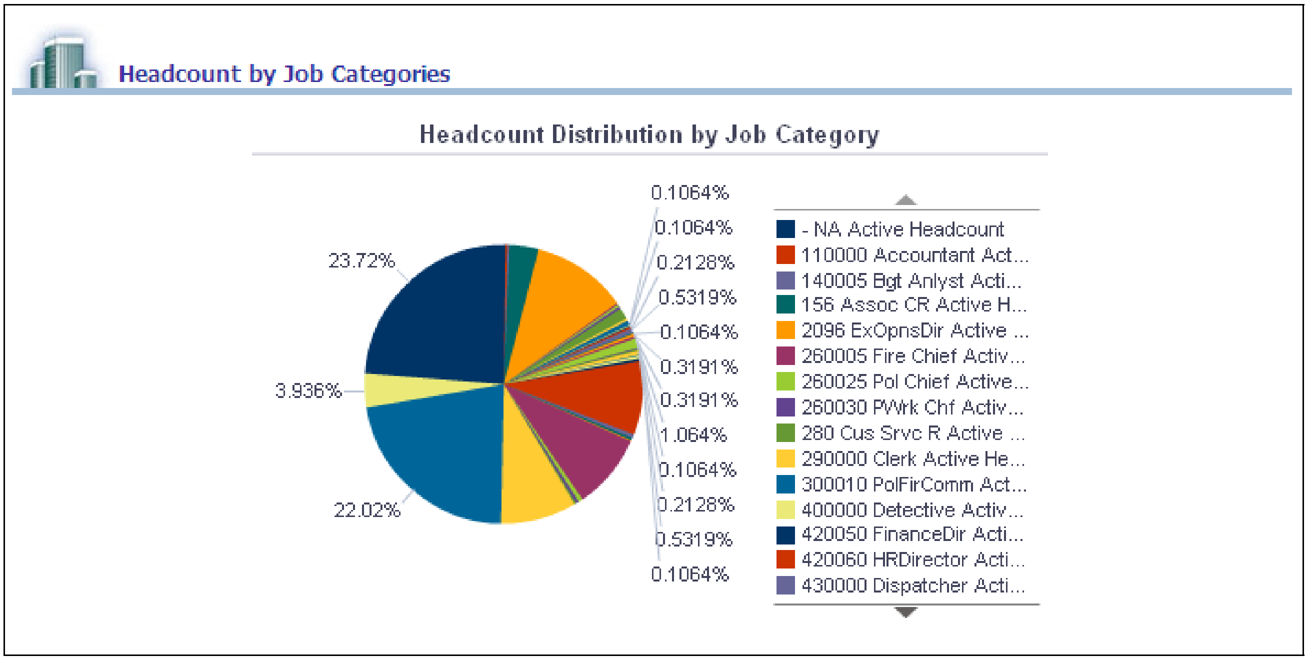
Pie Chart Data	***View By Filter***
The Headcount Distribution pie chart displays *Headcount* data grouped by *Department.* **Note.** You can click on a pie slice to drill down to headcount data for a particular department or location.	Use this filter to view report results by: • *Department* (default) • *Location*

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

Report Column / Measure Name	***Report Column / Measure Origin***
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, part 1

Choose Job Attribute: Job Series

	Active Headcount	% of Total Headcount
Job Series		
- NA	2	0.0%
110000 Accountant	2	0.0%
140005 Bgt Anlyst	2	0.0%
156 Assoc CR	32	0.1%
2096 ExOpnsDir	104	0.3%
260005 Fire Chief	2	0.0%
260025 Pol Chief	2	0.0%
260030 PWrk Chf	3	0.0%
280 Cus Srvc R	12	0.0%
290000 Clerk	3	0.0%
300010 PolFirComm	5	0.0%
400000 Detective	1	0.0%
420050 FinanceDir	1	0.0%
420060 HRDirector	2	0.0%
430000 Dispatcher	5	0.0%
450010 PW Eng I	1	0.0%
450015 PW Eng II	3	0.0%
470000 F/Fighter	3	0.0%
600045 CustSvcMgr	10	0.0%
630000 Mayor	1	0.0%
670020 AC Ofc I	2	0.0%
670025 AC Ofc II	5	0.0%
670035 SpvrAC Ofc	1	0.0%
670050 LawEnf Ofc	3	0.0%
680025 SnowRmvOpr	3	0.0%

Rows 1 - 25

Headcount by Job Categories report, part 2

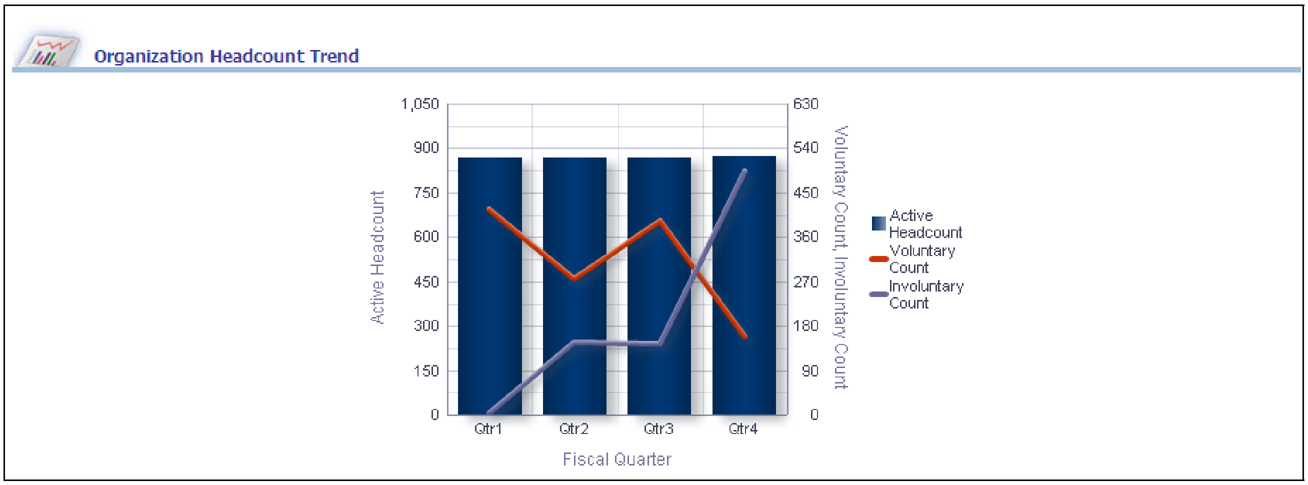
Pie Chart Data	***View By Filter***
The Headcount by Job Categories pie chart displays *Headcount* data grouped by *Job Series.* Headcount data can also be grouped by the following dimensions, depending on your View By filter selection: • *Grade* • *Job Code* • *Job Series* (default) **Note.** You can click on a pie slice to drill down to headcount data for a particular job code, job series, or grade.	Use this filter to view report results by: • *Grade* • *Job Code* • *Job Series* (default)

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

Report Column / Measure Name	Report Column / Measure Origin
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.

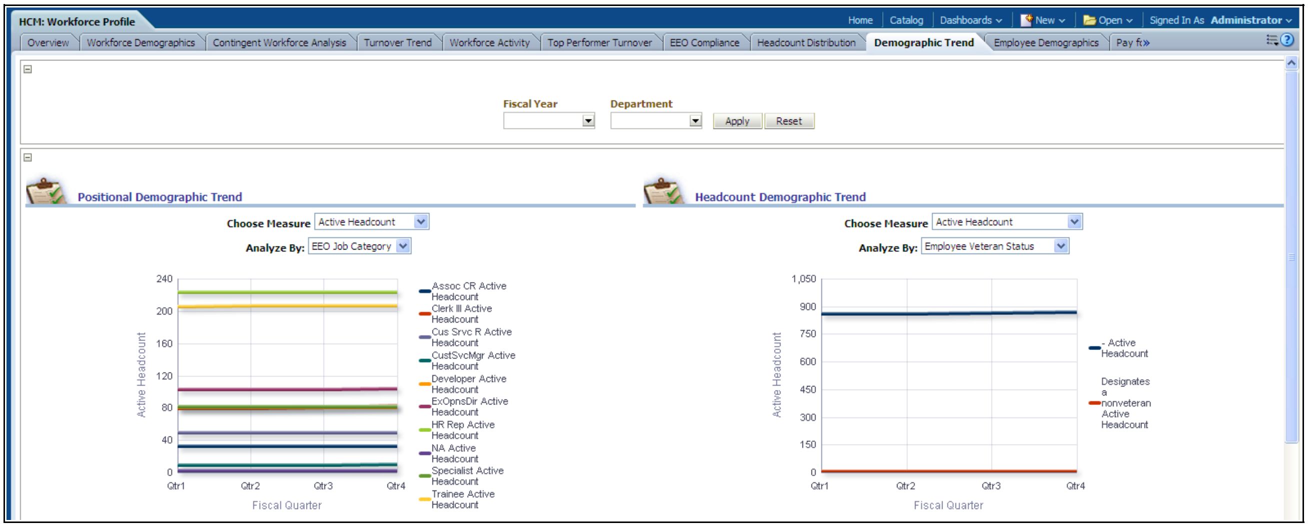
The following table lists the columns and measures used in the Organization Headcount Trend report.

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

Report Column / Measure Name	***Report Column / Measure Origin***
Headcount	Workforce (F_WORKFORCE) Fact

Using the Workforce Profile Dashboard - Demographic Trend Page

Access the Demographic Trend page (Dashboards, 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.	This page is comprised of the following reports: • Positional Demographic Trend report • Headcount Demographic Trend report	Use the Demographic Trend page prompt to filter page results by: • Fiscal Year • Department

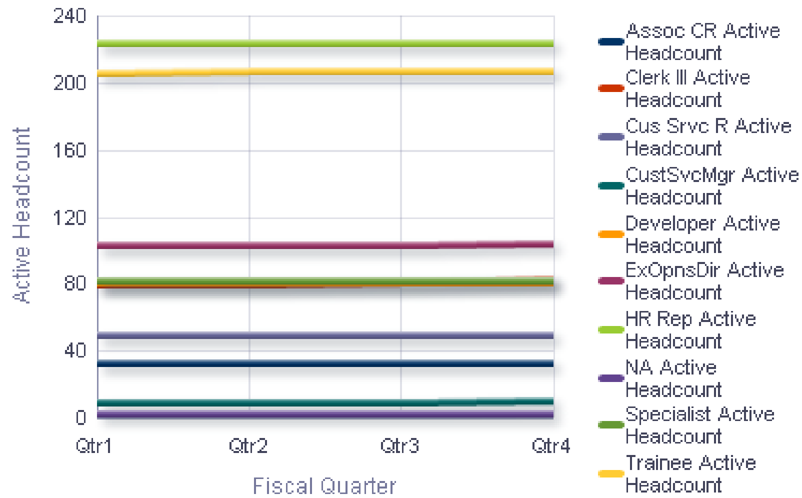
Positional Demographic Trend Report

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

Choose Measure Active Headcount

Analyze By: EEO Job Category



	Qtr1	Qtr2	Qtr3	Qtr4
	Active Headcount	Active Headcount	Active Headcount	Active Headcount
EEO Job Category				
Assoc CR	32	32	32	32
Clerk III	79	79	80	83
Cus Srvc R	49	49	49	49
CustSvcMgr	9	9	9	10
Developer	80	80	80	80
ExOpnsDir	103	103	103	104
HR Rep	223	223	223	223
NA	2	2	2	2
Specialist	82	82	82	82
Trainee	205	206	206	207

Positional Demographic Trend report

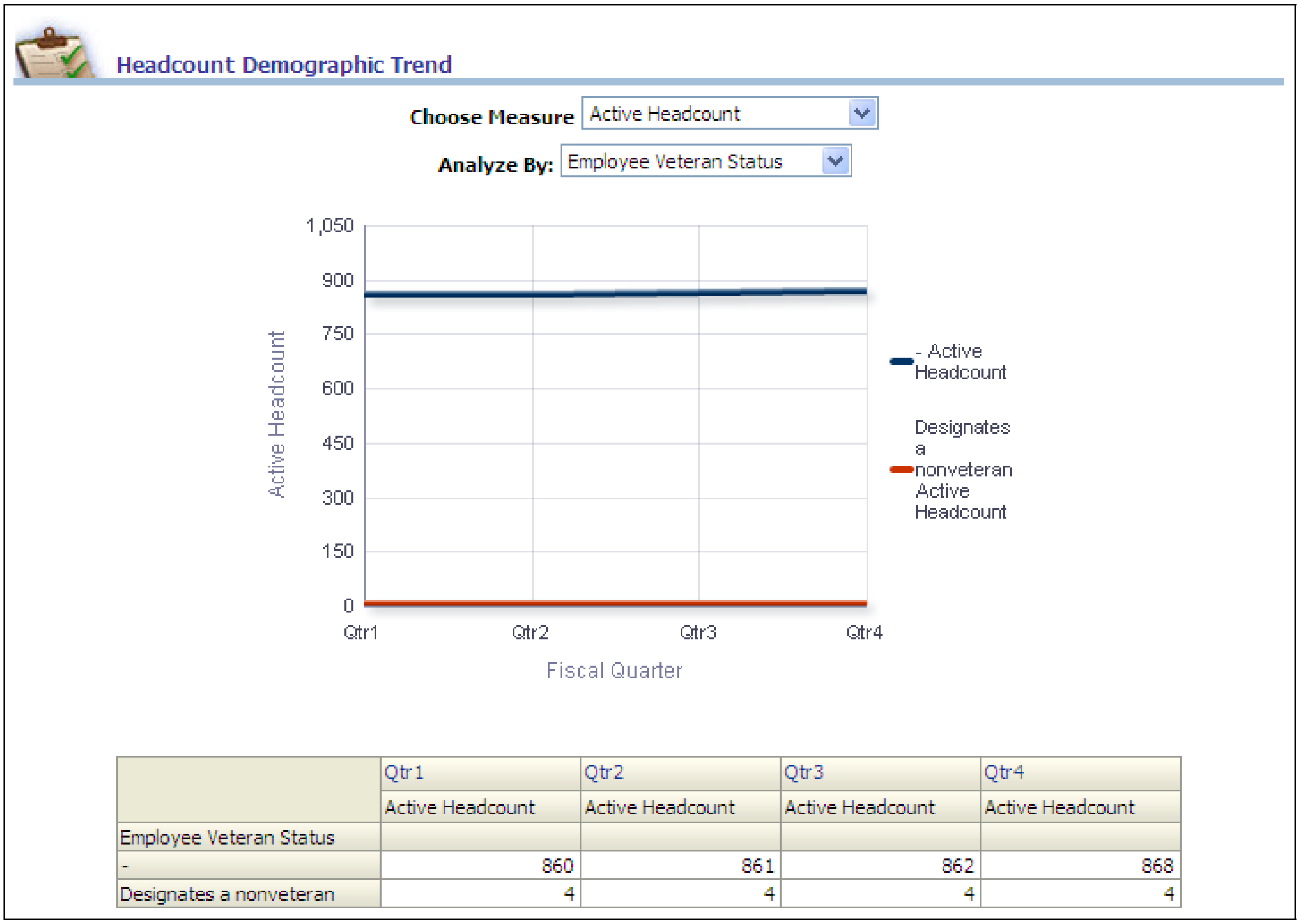
X,Y Axis Data	***Choose Measure***	***Analyze By Filter***
The Positional Demographic Trend graph displays *Fiscal Quarter* data on the x-axis and *Headcount* data on the y-axis, with *EEO Job Category* data plotted across the x/y-axis. The y-axis can also display any of the following measures, depending on your Choose Measure filter selection: • *Headcount* (default) • *Voluntary Headcount* • *Involuntary Headcount* • *Number of Promotion* The x/y-axis can also plot any of the following dimensions, depending on your Analyze By filter selection: • *Pay Grade* • *Job Category* • *EEO Job Category* (default) **Note.** You can click on graph data to review drill down data for a particular quarter.	Use this filter to view report results by the following measures: • *Headcount* (default) • *Voluntary Headcount* • *Involuntary Headcount* • *Number of Promotion*	Use this filter to view report results by the following dimensions: • *Pay Grade* • *Job Series* • *EEO Job Category* (default)

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

Report Column / Measure Name	***Report Column / Measure Origin***
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.



	Qtr1	Qtr2	Qtr3	Qtr4
	Active Headcount	Active Headcount	Active Headcount	Active Headcount
Employee Veteran Status				
-	860	861	862	868
Designates a nonveteran	4	4	4	4

Headcount Demographic Trend report

X,Y Axis Data	Choose Measure	Analyze By Filter
The Headcount Demographic Trend graph displays *Fiscal Quarter* data on the x-axis and *Headcount* data on the y-axis, with *Employee Veteran Status* data plotted across the x/y-axis. The y-axis can also display any of the following measures, depending on your Choose Measure filter selection: • *Headcount* (default) • *Voluntary Headcount* • *Involuntary Headcount* • *Number of Promotion* • *Dissatisfied Termination Ratio* The x/y-axis can also plot any of the following dimensions, depending on your Analyze By filter selection: • *Age* • *Employee High Potential Flag* • *Employee Marital Status* • *Gender* • *Employee Citizenship* • *Employee Disability* • *Security Clearance Level* • *Ethnic Group* • *Veterans Preference Code* • *Employee Veteran Status* (default) **Note.** You can click on the data in the graph to review drill down data for a particular quarter.	Use this filter to view report results by the following measures: • *Headcount* (default) • *Voluntary Headcount* • *Involuntary Headcount* • *Number of Promotion* • *Dissatisfied Termination Ratio*	Use this filter to view report results by the following dimensions: • *Age* • *Employee High Potential Flag* • *Employee Marital Status* • *Gender* • *Employee Citizenship* • *Employee Disability* • *Security Clearance Level* • *Ethnic Group* • *Veterans Preference Code* • *Employee Veteran Status* (default)

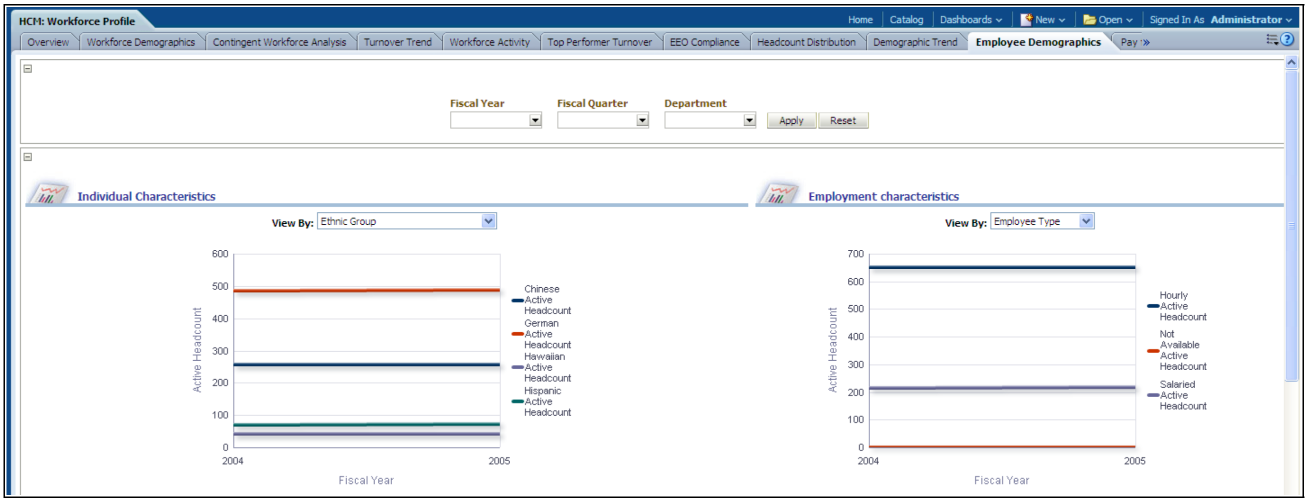
The following table lists the columns and measures used in the Headcount Demographic Trend report.

Report Column / Measure Name	Report Column / Measure Origin
Fiscal Quarter	Day (D_DAY) Dimension
Age	Person (D_PERSON) Dimension

Report Column / Measure Name	***Report Column / Measure Origin***
Employee High Potential Flag	This flag uses a *Y* or *N* value, based on Higher Education Level (HI_EDU_LVL_CD) values, which include: • *J* (Doctorate Academic) • *K* (Doctorate Professional) • *L* (Post Doctorate) 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.
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	Workforce (F_WORKFORCE) Fact: (If F_WORKFORCE.TERMINATE_COUNT <> 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)

Using the Workforce Profile Dashboard - Employee Demographics Page

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

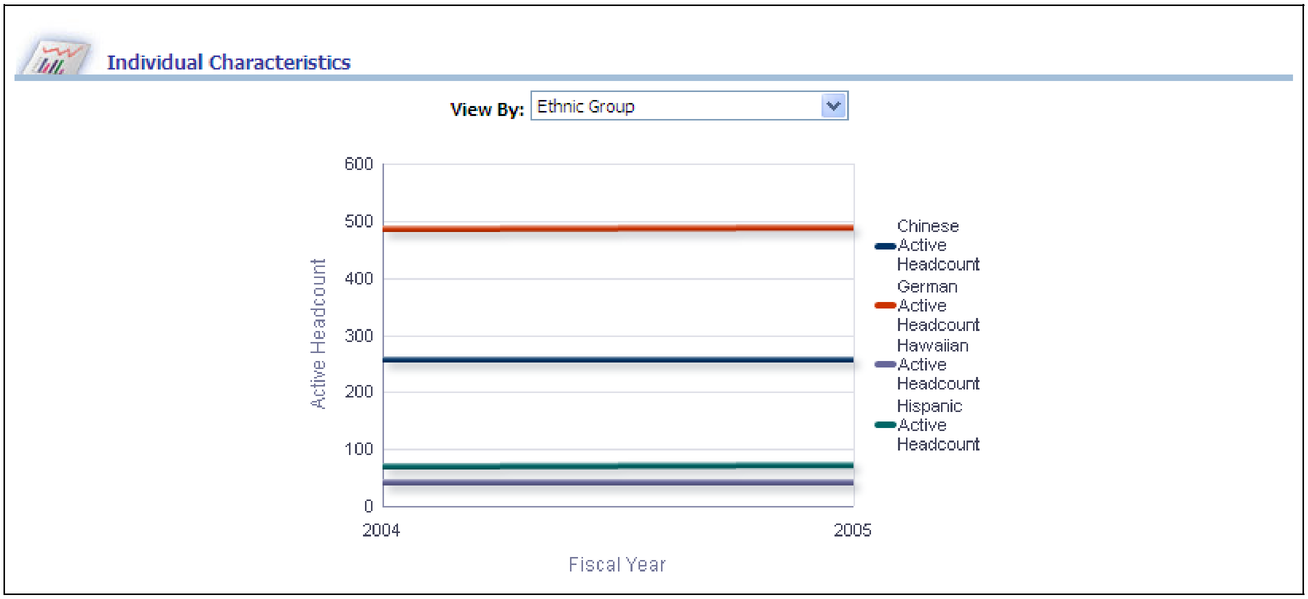


Employee Demographics page

Usage	***Reports***	***Dashboard Prompt***
Provides a detailed overview of employee demographics and characteristics for your organization.	This page is comprised of the following reports: • Individual Characteristics report • Employment Characteristics report	Use the Employee Demographics page prompt to filter page results by: • Fiscal Year • Fiscal Quarter • Department

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, part 1

		2004		2005	
		Active Headcount	% of Dept Total	Active Headcount	% of Dept Total
Department	Ethnic Group				
Admin	Chinese	257	35.4%	257	35.4%
	German	435	59.8%	435	59.8%
	Hawaiian	35	4.8%	35	4.8%
Admin Total		**727**	**100.0%**	**727**	**100.0%**
HQ	German	35	87.5%	35	81.4%
	Hawaiian	5	12.5%	5	11.6%
	Hispanic			3	7.0%
HQ Total		**40**	**100.0%**	**43**	**100.0%**
HR	Chinese	1	20.0%	1	20.0%
	German	3	60.0%	3	60.0%
	Hawaiian	1	20.0%	1	20.0%
HR Total		**5**	**100.0%**	**5**	**100.0%**
IS	German	2	100.0%	2	100.0%
IS Total		**2**	**100.0%**	**2**	**100.0%**
North Sls	Chinese			2	2.6%
	German	2	2.8%	5	6.4%
	Hawaiian			1	1.3%
	Hispanic	70	97.2%	70	89.7%
North Sls Total		**72**	**100.0%**	**78**	**100.0%**
West Sls	German	10	100.0%	10	100.0%
West Sls Total		**10**	**100.0%**	**10**	**100.0%**

Analyze - Refresh - Print - Export

Individual Characteristics report, part 1

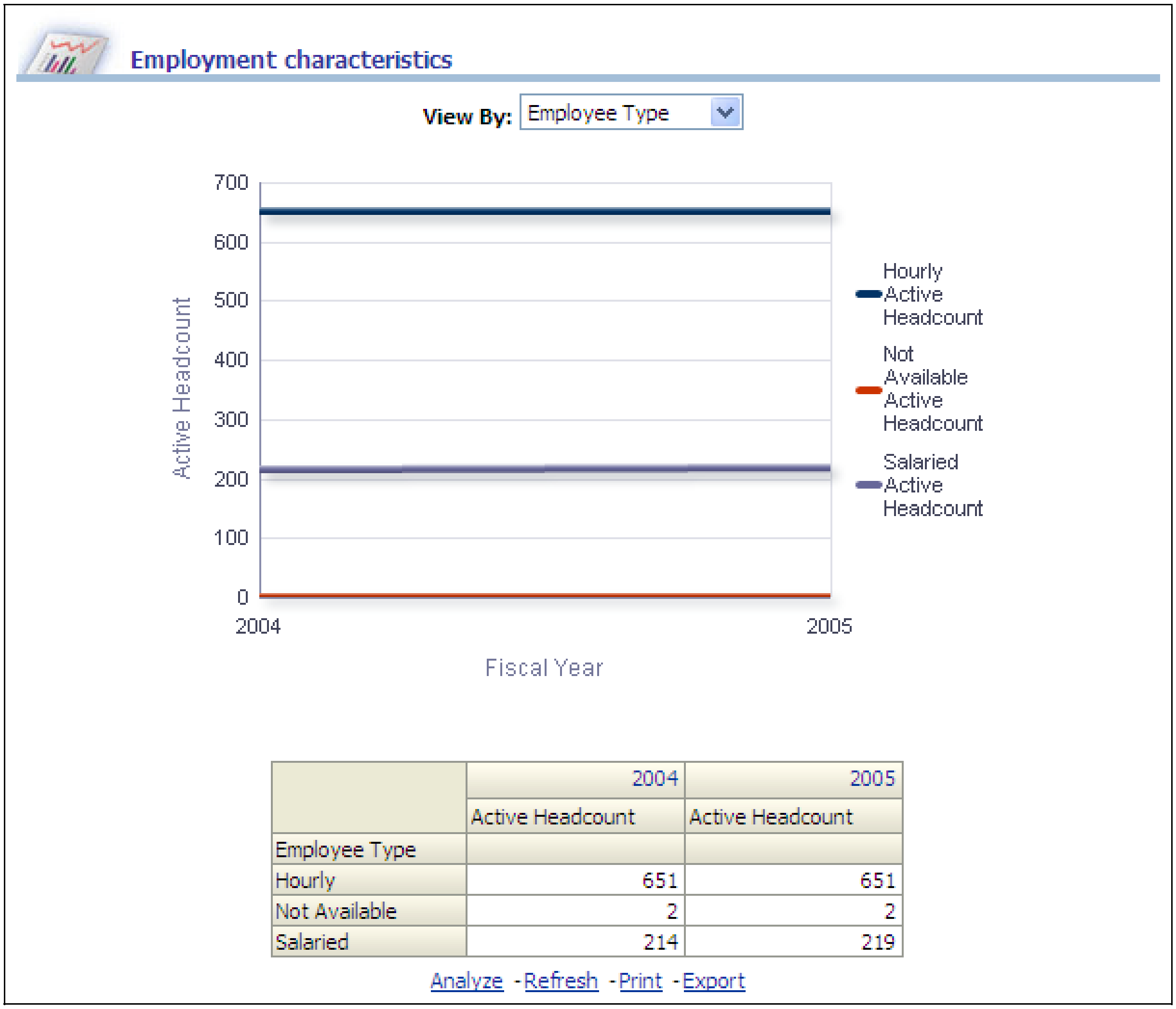
X,Y Axis Data	***View By Filter***
The Individual Characteristics graph displays *Fiscal Year* data on the x-axis and *Headcount* data on the y-axis, with *Ethnic Group* data plotted across the x/y-axis. The x/y-axis can also plot any of the following dimensions, depending on your View By filter selection: • *Gender* • *Age* • *Employee Citizenship* • *Employee Disability* • *Security Clearance Level* • *Employee Highest Education Degree* • *Employee Marital Status* • *Ethnic Group* (default) **Note.** You can click on graph data to review drill down data for a particular year.	Use this filter to view report results by: • *Gender* • *Age* • *Employee Citizenship* • *Employee Disability* • *Security Clearance Level* • *Employee Highest Education Degree* • *Employee Marital Status* • *Ethnic Group* (default)

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

Report Column / Measure Name	***Report Column / Measure Origin***
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: (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.



	2004	2005
	Active Headcount	Active Headcount
Employee Type		
Hourly	651	651
Not Available	2	2
Salaried	214	219

Employment Characteristics report

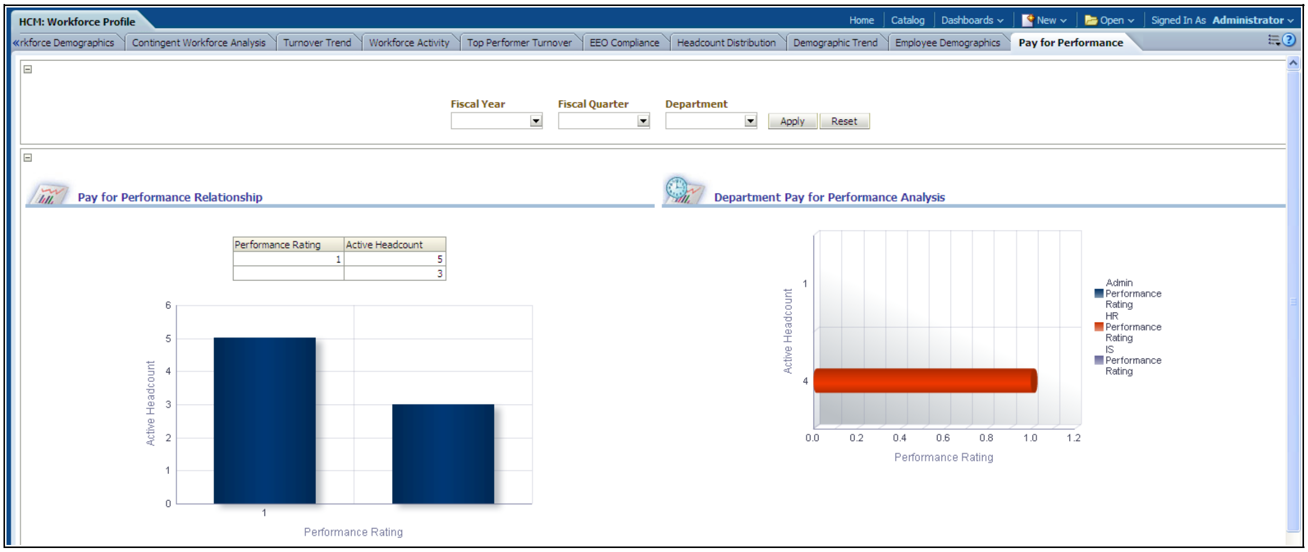
X,Y Axis Data	***View By Filter***
The Employment Characteristics graph displays *Fiscal Year* data on the x-axis and *Headcount* data on the y-axis, with *Employee Type* data plotted across the x/y-axis. The x/y-axis can also plot the Full Time/Part Time dimension, depending on your View By filter selection. **Note.** You can click on graph data to review drill down data for a particular year.	Use this filter to view report results by: • *Employee Type* (default) • *Full Time Part Time*

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

Report Column / Measure Name	***Report Column / Measure Origin***
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

Using the Workforce Profile Dashboard - Pay for Performance Page

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

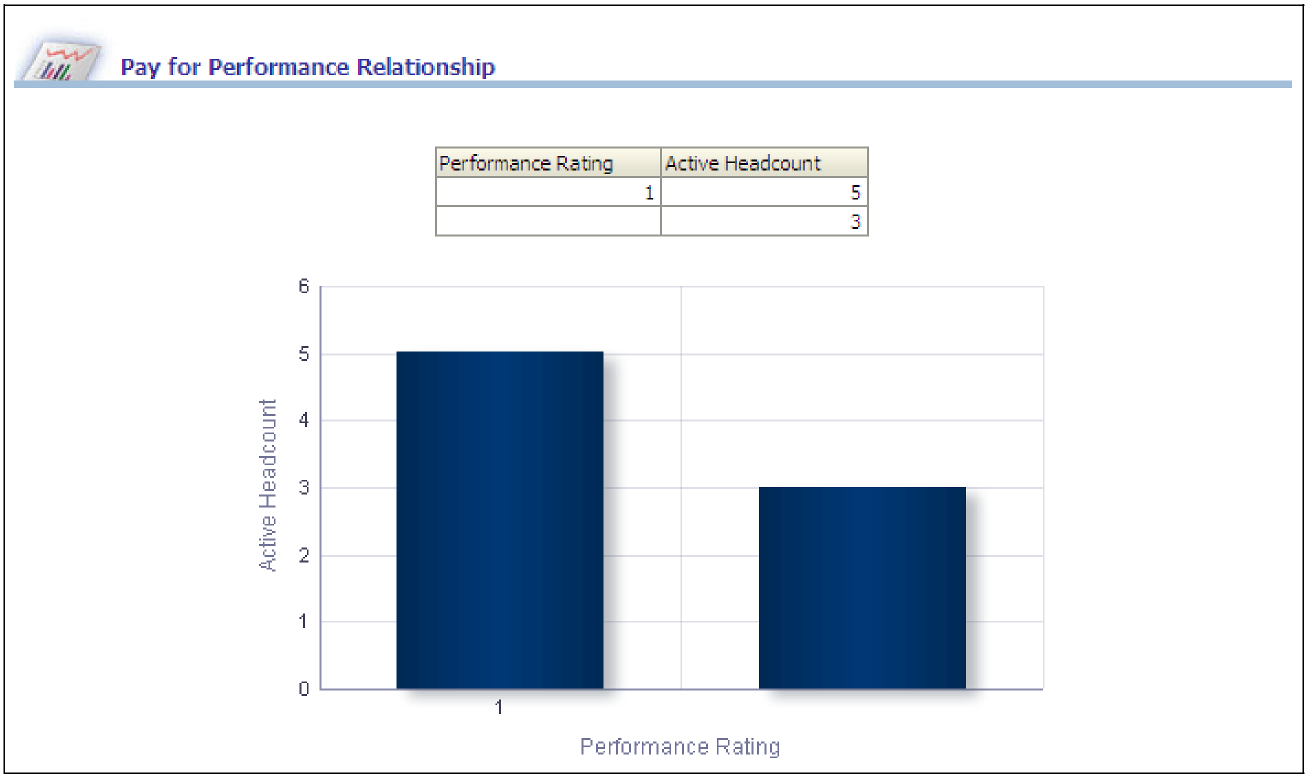


Pay for Performance page

Usage	*Reports*	*Dashboard Prompt*
Provides an overview of performance pay metrics for your organization, by relationship and department.	This page is comprised of the following reports: • Pay for Performance Relationship report • Department Pay for Performance Analysis report	Use the Pay for Performance page prompt to filter page results by: • Fiscal Year • Fiscal Quarter • Department

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

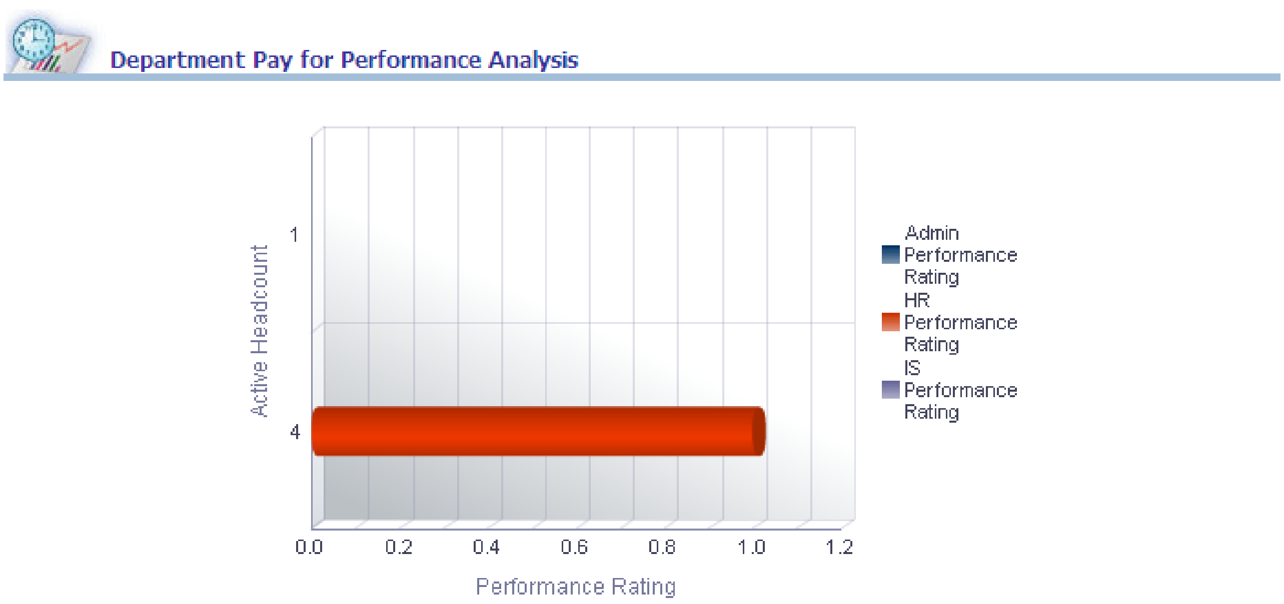
The Pay for Performance Relationship graph displays *Performance Rating* data on the x-axis and *Headcount* data on the y-axis.

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	Performance Rating	Active Headcount
Admin		1
HR	1	4
		1
IS	1	1
		1

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 9

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

Prerequisites

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

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

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 and cycle times, and increase working capital.

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

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

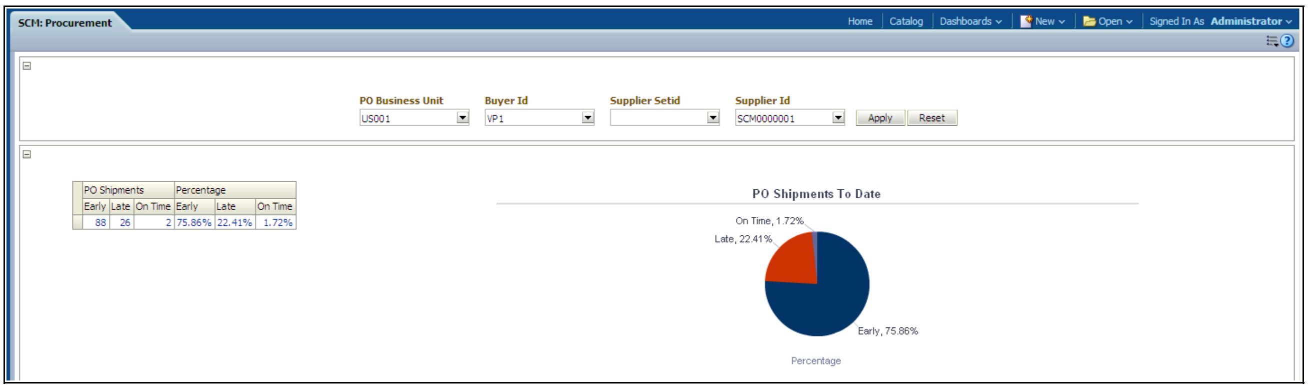
Delivered Security Groups

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 Page

Access the Procurement page (Dashboards, SCM Reports, SCM: Procurement, Procurement).

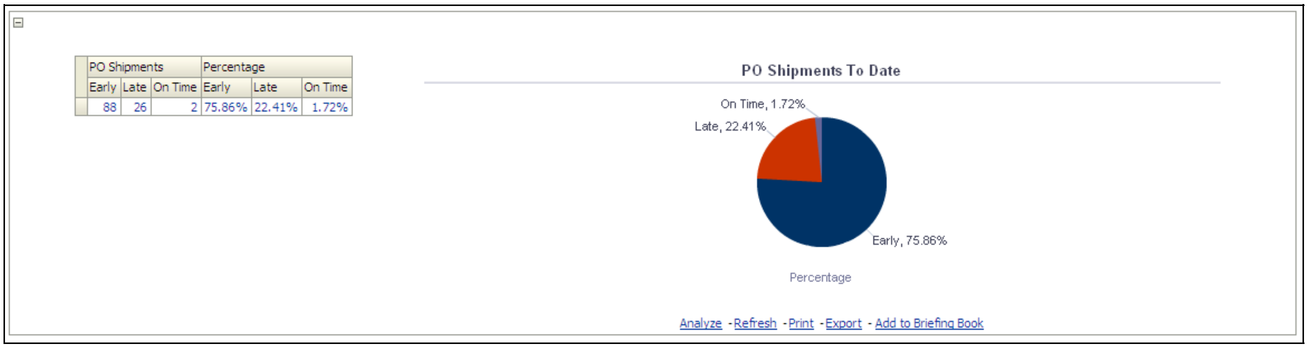


Procurement page

Usage	***Reports***	***Dashboard Prompt***
Provides you with an overview of supplier on-time performance by vendor PO shipments received versus expected delivery dates.	The Procurement page includes the Supplier On-Time Performance report.	Use the Procurement dashboard prompt to filter dashboard results by: • PO Business Unit • Buyer ID • Supplier SetID • Supplier ID

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

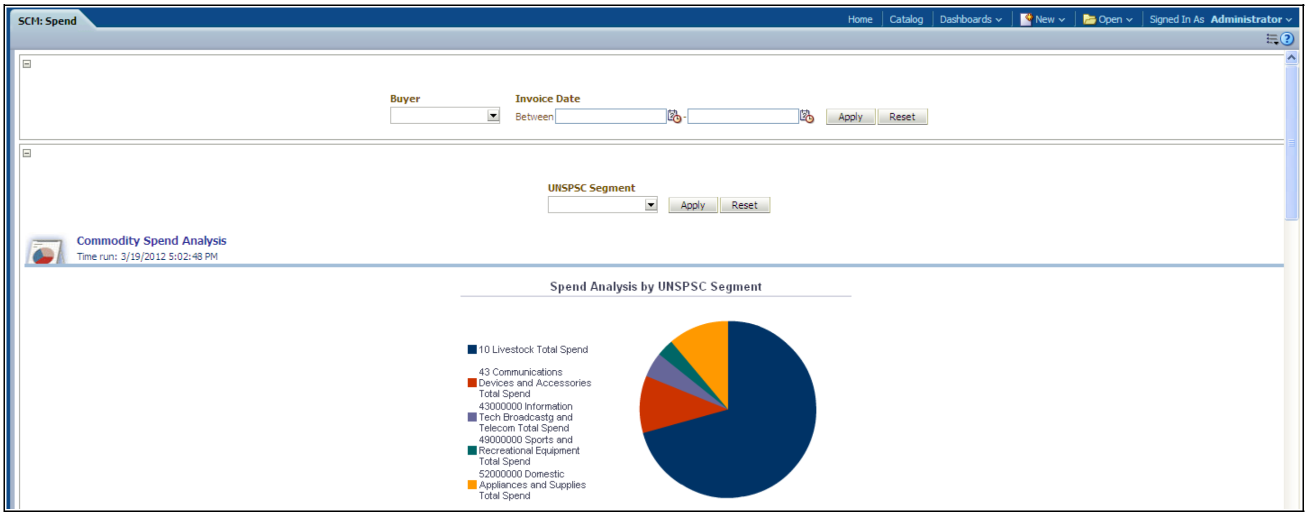
The pie chart shows the percentages of shipments to date that are early, late, and on time. Click a pie segment or a value within the table to view the Supplier On-Time Performance Drill report, which provides details of your shipments, including the items, ship to location, receipt date, and due date.

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

Report Column Name	***Report Column Origin 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 (Value is derived from row count)

Using the Spend Page

Access the Spend page (Dashboards, SCM Reports, SCM: Spend, Spend).

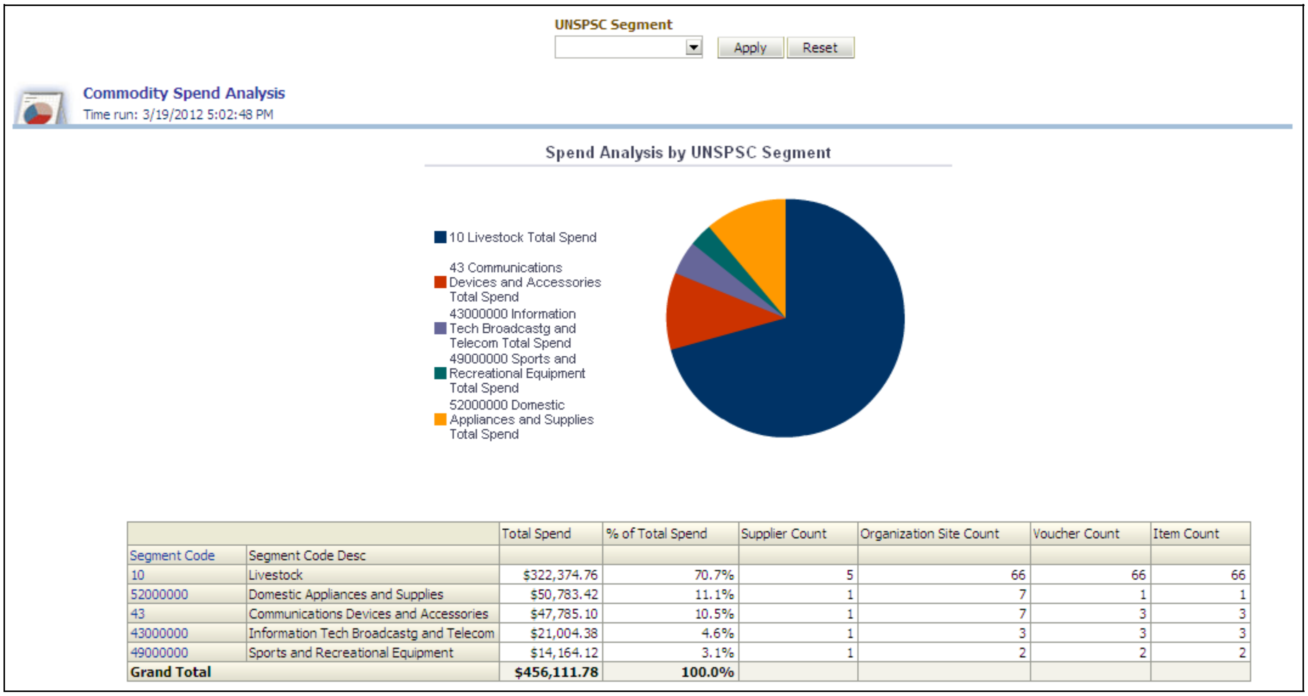


Spend page

Usage	***Reports***	***Dashboard Prompt***
Provides an overview of spending by commodity, supplier and organization.	This dashboard is comprised of the following reports: • Commodity Spend Analysis report • Supplier Spend Analysis report • Organization Spend Analysis report	Use the Spend dashboard prompt to filter dashboard results by: • Buyer • Invoice Date (this filter requires that you specify a time range using the two date prompts)

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.



		Total Spend	% of Total Spend	Supplier Count	Organization Site Count	Voucher Count	Item Count
Segment Code	Segment Code Desc						
10	Livestock	$322,374.76	70.7%	5	66	66	66
52000000	Domestic Appliances and Supplies	$50,783.42	11.1%	1	7	1	1
43	Communications Devices and Accessories	$47,785.10	10.5%	1	7	3	3
43000000	Information Tech Broadcastg and Telecom	$21,004.38	4.6%	1	3	3	3
49000000	Sports and Recreational Equipment	$14,164.12	3.1%	1	2	2	2
Grand Total		**$456,111.78**	**100.0%**				

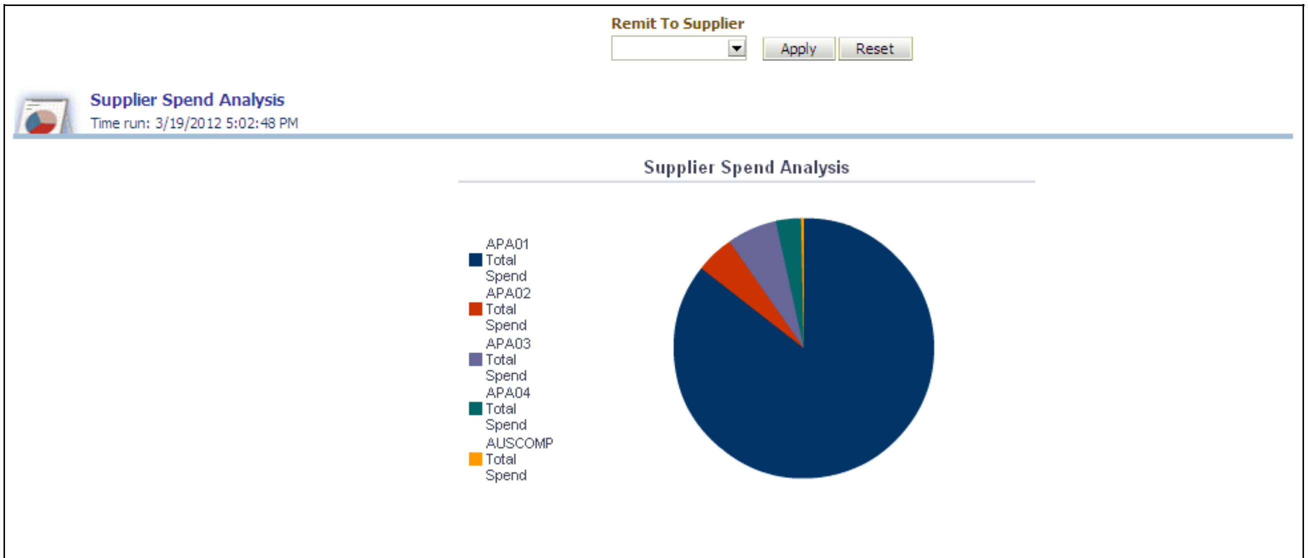
Commodity Spend Analysis report

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.



	Total Spend	% of Total Spend	Organization Site Count	Voucher Count	Item Count
Remit To Supplier					
APA01	$467,859.20	85.5%	96	64	68
APA03	$34,001.98	6.2%	3	3	5
APA02	$26,000.00	4.8%	4	4	6
APA04	$17,050.20	3.1%	4	4	6
AUSCOMP	$2,000.00	0.4%	2	2	2
Grand Total	**$546,911.38**	**100.0%**			

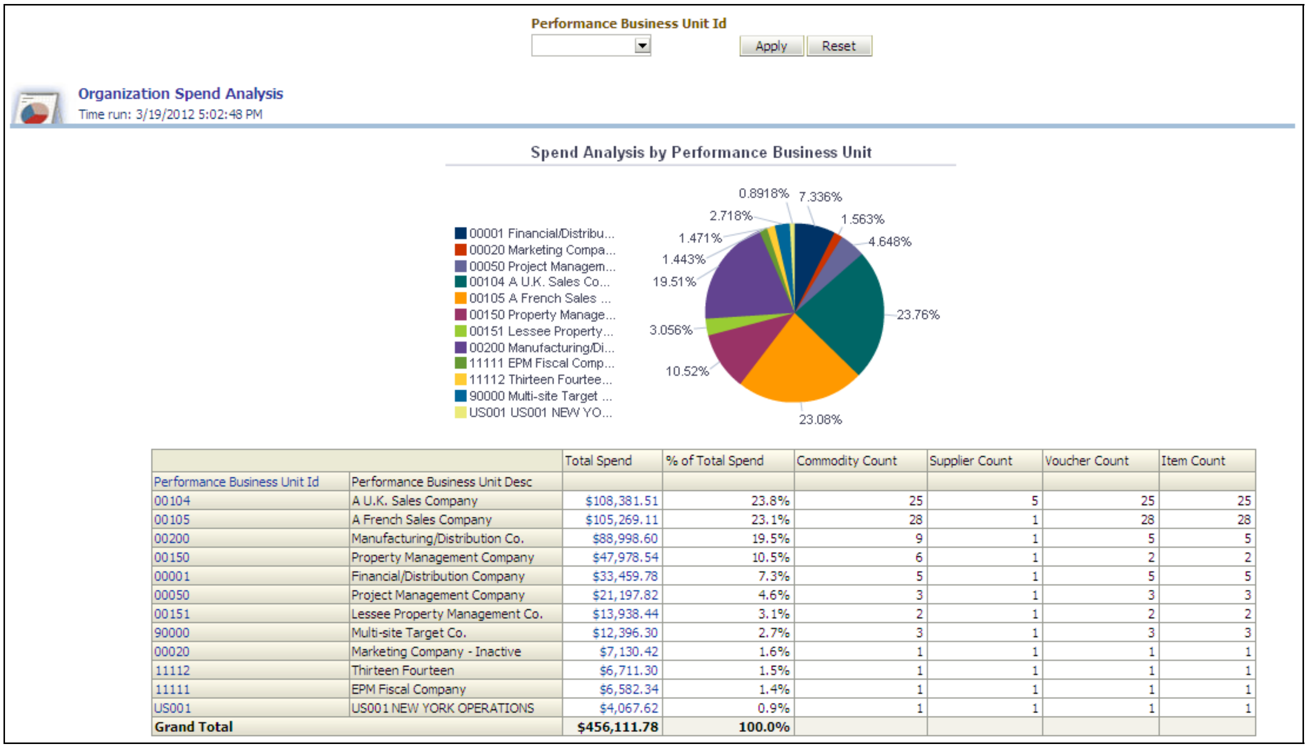
Supplier Spend Analysis report

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.



Performance Business Unit Id	Performance Business Unit Desc	Total Spend	% of Total Spend	Commodity Count	Supplier Count	Voucher Count	Item Count
00104	A U.K. Sales Company	$108,381.51	23.8%	25	5	25	25
00105	A French Sales Company	$105,269.11	23.1%	28	1	28	28
00200	Manufacturing/Distribution Co.	$88,998.60	19.5%	9	1	5	5
00150	Property Management Company	$47,978.54	10.5%	6	1	2	2
00001	Financial/Distribution Company	$33,459.78	7.3%	5	1	5	5
00050	Project Management Company	$21,197.82	4.6%	3	1	3	3
00151	Lessee Property Management Co.	$13,938.44	3.1%	2	1	2	2
90000	Multi-site Target Co.	$12,396.30	2.7%	3	1	3	3
00020	Marketing Company - Inactive	$7,130.42	1.6%	1	1	1	1
11112	Thirteen Fourteen	$6,711.30	1.5%	1	1	1	1
11111	EPM Fiscal Company	$6,582.34	1.4%	1	1	1	1
US001	US001 NEW YORK OPERATIONS	$4,067.62	0.9%	1	1	1	1
Grand Total		**$456,111.78**	**100.0%**				

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.

Chapter 10

Working with the Delivered OBIEE Data Load Analysis Dashboard

This chapter provides prerequisites, an overview of the Data Load Analysis dashboard, and discusses:

- Error Table Reports Page
- Job Run Statistics Page

Note. The Data Load Analysis dashboard is only available for the Campus Solutions, FMS, and HCM warehouses.

Prerequisites

Before you use the Data Load Analysis dashboard, you must implement:

- PeopleSoft Campus Solutions Warehouse
- PeopleSoft FMS Warehouse
- PeopleSoft HCM Warehouse

Understanding the Data Load Analysis Dashboard

Accurate reporting on your organization's data is completely dependent on the validity of data stored in Multidimensional Warehouse (MDW) tables; if incomplete or incorrect data resides in these tables, reporting and analysis can be flawed. Given the considerable dependence on data in MDW tables, all source data entering EPM is validated within ETL jobs. Additionally, specific ETL jobs capture job statistic and error data (for example, source row count versus target insert row count). The summarized validation, job statistic, and error data is stored in specific MDW target tables.

See *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*, "Preparing to Load Source Data Into EPM," Understanding Data Validation and Error Handling in the ETL Process.

The Data Load Analysis dashboard provides user-friendly reports built on top of the MDW tables with summarized error data and helps you analyze job run statistics data and quickly identify specific data failing validation.

The Data Load Analysis dashboard reports can help answer:

- Which jobs had data load issues that caused missing data?
- Which jobs had data loaded to error tables?
- What source data failed the lookup validation and the related lookup table?
- What is the job status and job statistics for each run?
- Which jobs completed with a "Failed" status (for a specific time interval)?
- Which jobs completed with a "Success" status (for a specific time interval)?
- Which jobs completed with a "Success with Error Rows" or "Success with Data Mismatch" status (for a specific time interval)?
- How many errors were encountered for each job in its last run, for a particular error table?
- How many rows failed for the missing lookup value for each job, for a particular error table?
- Which jobs completed with a "Warning" status (for a specific time interval)?
- How is dimension and fact table growth trending for a specific EPM warehouse (over a specific time interval)?

The new Data Load Analysis dashboard contains the following pages:

- Error Table Reports
- Job Run Statistics

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.

Drilldown Feature for Error Table Page Reports

The reports in the Error Table page enable you to drill down from summarized error information to individual error details, such as source table columns and lookup table columns.

The reports in the Error Table page provide the following drill down levels and error details:

- Level one provides error details up to job run time and total error count.

  (This is the main report page level).

- Level two provides drill down to lookup table and error row count per lookup table.
- Level three provides drill down to lookup columns, error data and source columns, and error row count.
- Level four is the last level and provides error details down to error SID.

Note. Every time you drill down a level, the corresponding error count is also summarized accordingly.

Using this feature you can quickly and easily pinpoint specific error data, such as individual failed source columns and related error table, error ID, lookup columns, target table, and so forth.

The following sections provide an example of the Error Table reports drill down feature.

Level One Error Table Report

Level one Error Table report provides error details up to job run time and total error count.

Error Table

Error Table	Source Table	Target Table	Batch Run Id	Last Update Time	Error Count
PS_E_ADM_APPL_DATA	PS_ADM_APPL_DATA	PS_F_ADM_APPL	3162	3/19/2012 7:22:05 AM	1960
		PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	38

Level one Error Table report

From here you can drill down on the *Error Table, Source Table, Target Table, Batch Run ID,* or *Last Update Time* fields.

For this example, assume you drill down on the PS_E_ADM_APPL_DATA error table.

Level Two Error Table Report

Level two Error Table report provides drill down details to source table, target table, Batch Run ID and error row count per lookup table.

Error Table

Error Table	Lookup Table	Source Table	Target Table	Batch Run Id	Last Update Time	Error Count
PS_E_ADM_APPL_DATA	D_ACAD_LVL	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	6
	D_ADMIT_TYPE	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	32
	D_APPL_CNTR	PS_ADM_APPL_DATA	PS_F_ADM_APPL	3162	3/19/2012 7:22:05 AM	69
	D_PERSON	PS_ADM_APPL_DATA	PS_F_ADM_APPL	3162	3/19/2012 7:22:05 AM	1891

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Level two Error Table report

From here you can drill down on the *Error Table, Lookup Table, Source Table, Target Table, Batch Run ID,* or *Last Update Time* fields.

For this example, assume you drill down on the D_ADMIT_TYPE lookup table.

Level Three Error Table Report

Level three provides drill down details to source columns, lookup columns, source table, target table, batch run ID, and last update time, per failed source column data.

Error Table

<table>
<tr><th>Error Table</th><th>Lookup Table</th><th>Failed Source Columns data</th><th>Source Columns</th><th>Lookup Columns</th><th>Source Table</th><th>Target Table</th><th>Batch Run Id</th><th>Last Update Time</th><th>Error Count</th></tr>
<tr><td rowspan="6">PS_E_ADM_APPL_DATA</td><td rowspan="6">D_ADMIT_TYPE</td><td>PSAUS | TAC | 2008-12-18 00:00:00 | 2008-12-18 00:00:00 | HCM</td><td>ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID</td><td>INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID</td><td>PS_ADM_APPL_DATA</td><td>PS_F_ADM_APPL_STAT</td><td>3168</td><td>3/19/2012 7:52:57 AM</td><td>10</td></tr>
<tr><td>PSAUS | TAC | 2008-12-22 00:00:00 | 2008-12-22 00:00:00 | HCM</td><td>ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID</td><td>INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID</td><td>PS_ADM_APPL_DATA</td><td>PS_F_ADM_APPL_STAT</td><td>3168</td><td>3/19/2012 7:52:57 AM</td><td>10</td></tr>
<tr><td>PSUNV | ONL | 2009-11-22 00:00:00 | 2009-11-22 00:00:00 | HCM</td><td>ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID</td><td>INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID</td><td>PS_ADM_APPL_DATA</td><td>PS_F_ADM_APPL_STAT</td><td>3168</td><td>3/19/2012 7:52:57 AM</td><td>3</td></tr>
<tr><td>PSUNV | ONL | 2009-11-29 00:00:00 | 2009-11-29 00:00:00 | HCM</td><td>ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID</td><td>INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID</td><td>PS_ADM_APPL_DATA</td><td>PS_F_ADM_APPL_STAT</td><td>3168</td><td>3/19/2012 7:52:57 AM</td><td>1</td></tr>
<tr><td>PSUNV | ONL | 2009-12-06 00:00:00 | 2009-12-06 00:00:00 | HCM</td><td>ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID</td><td>INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID</td><td>PS_ADM_APPL_DATA</td><td>PS_F_ADM_APPL_STAT</td><td>3168</td><td>3/19/2012 7:52:57 AM</td><td>7</td></tr>
<tr><td>PSUNV | ONL | 2012-01-18 00:00:00 | 2012-01-18 00:00:00 | HCM</td><td>ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID</td><td>INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID</td><td>PS_ADM_APPL_DATA</td><td>PS_F_ADM_APPL_STAT</td><td>3168</td><td>3/19/2012 7:52:57 AM</td><td>1</td></tr>
</table>

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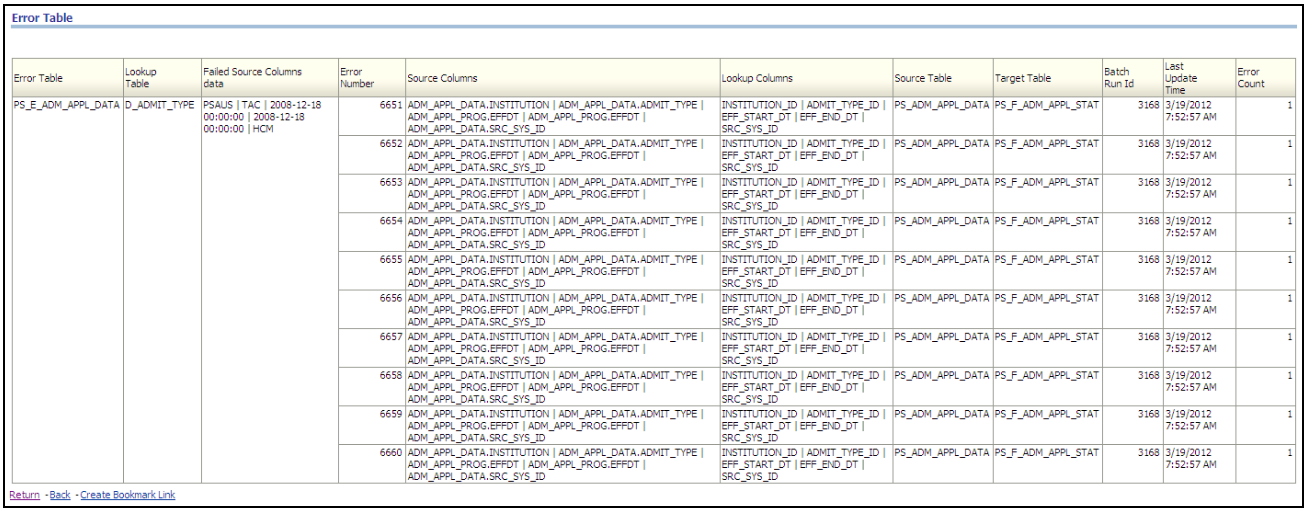
Level three Error Table report

From here you can drill down on the *Error Table, Lookup Table, Failed Source Columns Data, Lookup Columns, Source Table, Target Table, Batch Run ID,* or *Last Update Time* fields.

For this example, assume you drill down on the failed source column data PSAUS | TAC | 2008–12–18.

Level Four Error Table Report

Level four is the last level of drill detail and provides error details down to error number, error SID, lookup columns, and so forth.



Error Table

Error Table	Lookup Table	Failed Source Columns data	Error Number	Source Columns	Lookup Columns	Source Table	Target Table	Batch Run Id	Last Update Time	Error Count
PS_E_ADM_APPL_DATA	D_ADMIT_TYPE	PSAUS | TAC | 2008-12-18 00:00:00 | 2008-12-18 00:00:00 | HCM	6651	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1
			6652	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1
			6653	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1
			6654	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1
			6655	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1
			6656	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1
			6657	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1
			6658	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1
			6659	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1
			6660	ADM_APPL_DATA.INSTITUTION | ADM_APPL_DATA.ADMIT_TYPE | ADM_APPL_PROG.EFFDT | ADM_APPL_PROG.EFFDT | ADM_APPL_DATA.SRC_SYS_ID	INSTITUTION_ID | ADMIT_TYPE_ID | EFF_START_DT | EFF_END_DT | SRC_SYS_ID	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	1

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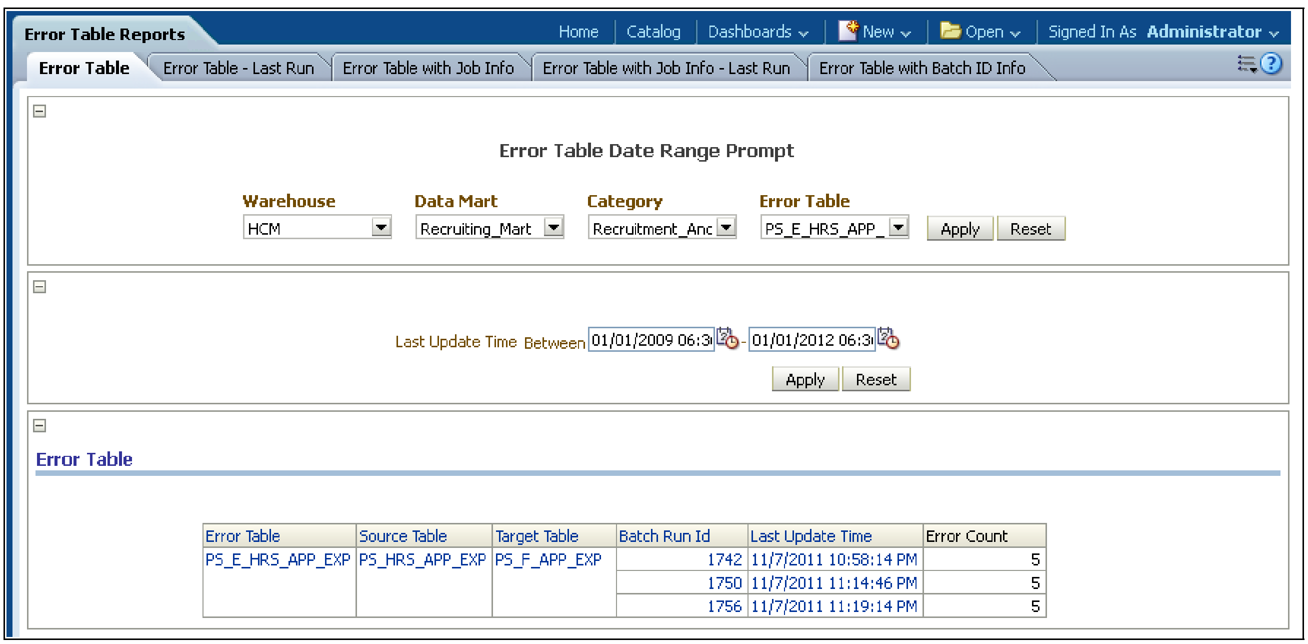
Level four Error Table report

Using the Data Load Analysis Dashboard - Error Table Reports Page

Access the Error Table Reports page (Dashboards, Data Load Analysis, Error Table Reports, Error Table).



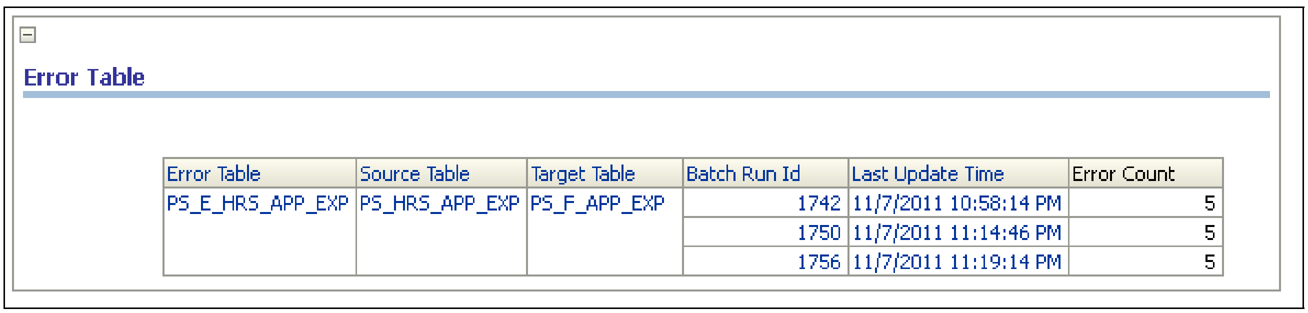
Error Table	Source Table	Target Table	Batch Run Id	Last Update Time	Error Count
PS_E_HRS_APP_EXP	PS_HRS_APP_EXP	PS_F_APP_EXP	1742	11/7/2011 10:58:14 PM	5
			1750	11/7/2011 11:14:46 PM	5
			1756	11/7/2011 11:19:14 PM	5

Error Table Reports Page

Usage	***Reports***	***Dashboard Prompt***
Provides summarized error detail information—including error and source table—for each job, for a given time period. This information enables you to easily identify and correct invalid data. **Note.** Each error report enables you to drill down from summary level information to the detailed level. This is discussed in detail in the previous section of this chapter, 'Understanding the Data Load Analysis Dashboard.'	This page is comprised of the following reports: • Error Table • Error Table - Last Run • Error Table with Job Info • Error Table with Job Info - Last Run • Error Table with Batch ID Info	Use the Error Table Reports page prompt to filter page results by: • Warehouse • Data Mart • Category • Error Table • Last Update Time

Error Table Report

Access the Error Table report, which provides summarized error detail information for each batch run.



Error Table

Error Table	Source Table	Target Table	Batch Run Id	Last Update Time	Error Count
PS_E_HRS_APP_EXP	PS_HRS_APP_EXP	PS_F_APP_EXP	1742	11/7/2011 10:58:14 PM	5
			1750	11/7/2011 11:14:46 PM	5
			1756	11/7/2011 11:19:14 PM	5

Error Table report

Column	***Description***
Error Table	Displays the error table name associated with the job.
Source Table	Displays the source table name that corresponds to the error table, for the job.
Target Table	Displays the target table name that corresponds to the error table, for the job.
Batch Run ID	Displays the batch run ID for the corresponding job.
Last Update Time	Displays the last update time associated with the job run.
Error Count	Displays the total count of rows loaded into the specified error table for a corresponding job.

Error Table - Last Run Report

The Error Table – Last Run report is identical to the Error Table report in format, but displays only information associated with the most recent job run.

Error Table with Job Info Report

Access the Error Table with Job Info report, which provides summarized error detail information for each job.

Error Table with Job Info

Error Table	Source Table	Target Table	Job Name	Batch Run Id	Last Update Time	Error Count
PS_E_HRS_APP_EXP	PS_HRS_APP_EXP	PS_F_APP_EXP	J_Fact_PS_F_APP_EXP	1756	11/7/2011 11:19:14 PM	5

Error Table with Job Info report

Column	*Description*
Error Table	Displays the error table name associated with the job.
Source Table	Displays the source table name that corresponds to the error table, for the job.
Target Table	Displays the target table name that corresponds to the error table, for the job.
Job Name	Displays the name of the job associated with the error data.
Batch Run ID	Displays the batch run ID for the corresponding job.
Last Update Time	Displays the last update time associated with the job run.
Error Count	Displays the total count of rows loaded into the specified error table for a corresponding job.

Error Table with Job Info - Last Run Report

The Error Table with Job Info – Last Run report is identical to the Error Table with Job Info report in format, but displays only information associated with the most recent job run.

Error Table with Batch ID Info Report

Access the Error Table with Batch ID Info report, which displays summarized error count information for each Batch Run ID.

Error Table with Batch ID Info

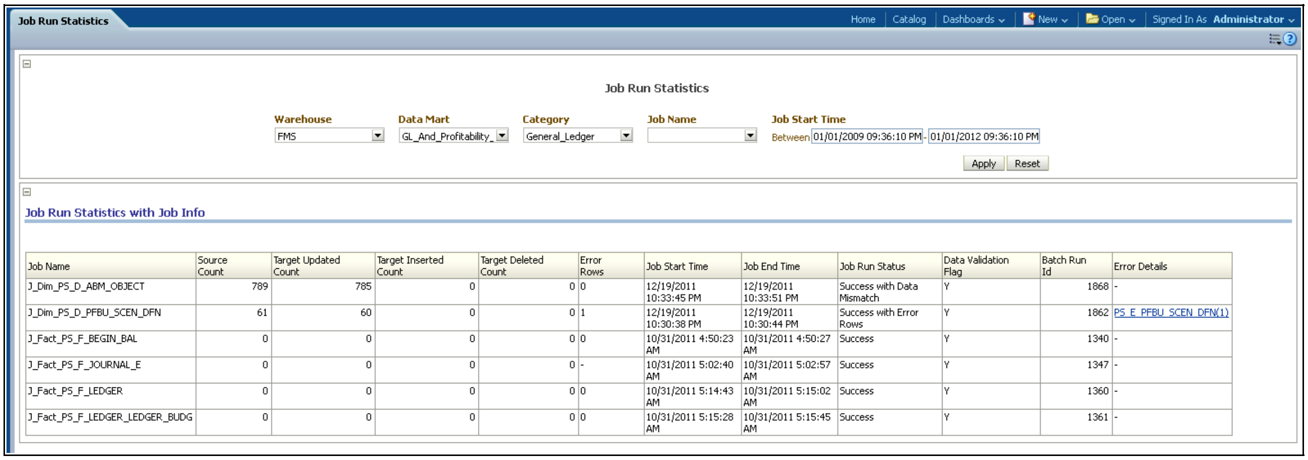
Error Table	Source Table	Target Table	Job Name	Batch Run Id	Last Update Time	Error Count
PS_E_ADM_APPL_DATA	PS_ADM_APPL_DATA	PS_F_ADM_APPL_STAT	J_Fact_PS_F_ADM_APPL_STAT	3168	3/19/2012 7:52:57 AM	38

Error Table with Batch ID Info report

Column	***Description***
Error Table	Displays the error table name associated with the job.
Source Table	Displays the source table name that corresponds to the error table, for the job.
Target Table	Displays the target table name that corresponds to the error table, for the job.
Job Name	Displays the name of the job associated with the error data.
Batch Run ID	Displays the batch run ID for the corresponding job.
Last Update Time	Displays the last update time associated with the job run.
Error Count	Displays the total count of rows loaded into the specified error table for a corresponding job.

Using the Data Load Analysis Dashboard - Job Run Statistics Page

Access the Job Run Statistics page (Dashboards, Data Load Analysis, Error Table Reports, Job Run Statistics).



Job Run Statistics page

Usage	***Reports***	***Dashboard Prompt***
Provides summarized job run statistics information—including source row count, target insert row count, and job run status—for each job, for a given time period. This information enables you to verify data completeness.	This page contains the Job Run Statistics with Job Info report.	Use the Job Run Statistics page prompt to filter page results by: • Warehouse • Data Mart • Category • Job Name • Job Start Time **Note.** Because the information in the Job Run Statistics report is summarized, each job displays information for multiple runs. This filter helps reduce the number of runs displayed.

Job Run Statistics with Job Info Report

Access the Job Run Statistics with Job Information report, which provides summarized job run statistics information.

Job Run Statistics with Job Info

Job Name	Source Count	Target Updated Count	Target Inserted Count	Target Deleted Count	Error Rows	Job Start Time	Job End Time	Job Run Status	Data Validation Flag	Batch Run Id	Error Details
J_Dim_PS_D_ABM_OBJECT	789	785	0	0	0	12/19/2011 10:33:45 PM	12/19/2011 10:33:51 PM	Success with Data Mismatch	Y	1868	-
J_Dim_PS_D_PFBU_SCEN_DFN	61	60	0	0	1	12/19/2011 10:30:38 PM	12/19/2011 10:30:44 PM	Success with Error Rows	Y	1862	PS_E_PFBU_SCEN_DFN(1)
J_Fact_PS_F_BEGIN_BAL	0	0	0	0	0	10/31/2011 4:50:23 AM	10/31/2011 4:50:27 AM	Success	Y	1340	-
J_Fact_PS_F_JOURNAL_E	0	0	0	0	-	10/31/2011 5:02:40 AM	10/31/2011 5:02:57 AM	Success	Y	1347	-
J_Fact_PS_F_LEDGER	0	0	0	0	0	10/31/2011 5:14:43 AM	10/31/2011 5:15:02 AM	Success	Y	1360	-
J_Fact_PS_F_LEDGER_LEDGER_BUDG	0	0	0	0	0	10/31/2011 5:15:28 AM	10/31/2011 5:15:45 AM	Success	Y	1361	-

Job Run Statistics with Job Information report

Job Run Statistics with Job Info

Job Name	Source Count	Target Updated Count	Target Inserted Count	Target Deleted Count	Error Rows	Job Start Time	Job End Time	Job Run Status	Data Validation Flag	Batch Run Id	Error Details
J_Dim_PS_D_PFBU_SCEN_DFN	61	60	0	0	1	12/19/2011 10:30:38 PM	12/19/2011 10:30:44 PM	Success with Error Rows	Y	1862	PS_E_PFBU_SCEN_DFN(1)

Job Run Statistics with Job Information report (with results filtered for a single job)

Column	***Description***
Job Name	Displays the job name associated with the job run statistics information.
Source Count	Displays the row count for rows in the source table.
Target Updated Count	Displays the row count for rows updated in the target table by the job.
Target Inserted Count	Displays the row count for rows inserted into the target table by the job.
Target Deleted Count	Displays the row count for rows deleted from the target table by the job.
Error Rows	Displays a count of unique rows from the source that failed to load the target due to lookup validation failure.
Job Start Time	Displays the job start time.
Job End Time	Displays the job end time.

Column	***Description***
Job Run Status	Displays the run status of a job and whether the data has been loaded into the target completely. Job run status values are: • Success: Indicates the ETL Job ran to success and all rows from the source are loaded to the target successfully. Hence the source count will match with sum of target rows. • Success with Error Rows: Indicates the ETL Job ran to success but some rows are rejected to Error Table. In this case the source count will tally with sum of target rows and error rows, provided EXCEPTION_FLAG is set to 'N' for the job. • Success with Data Mismatch: Indicates the ETL Job ran to success but source count does not tally with the sum of target counts and no rows are inserted into error table. • Warning: Indicates the ETL Job finished with warnings. In this case the source count might not tally with the sum of target rows and error rows. • Failed: Indicates the ETL Job aborted. In this case the source count will not tally with the sum of target rows and error rows. **Note.** Even if data validation is disabled for a job, job run status is still captured so that you can use this report to monitor job status.
Data Validation Flag	Indicates whether the handle data validation flag is set for the job.
Batch Run ID	Displays the batch run ID for the corresponding job and job run.
Error Details	Displays the error table names associated with the corresponding job and job run. Click the hyperlink to access the Error Table with Batch ID page (part of the Error Table Reports page) and view the consolidated error data for the selected Batch ID, job name and error table.

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