

ODS Functional Training Human Resources Training Workbook

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Section A: Human Resources Metadata

Lesson: Overview

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Workbook goal

The goal of this workbook is to provide you the knowledge and practice to run Human Resources ODS reports.

Workbook objectives

Upon completion of this course, you will be able to:

- define oracle basic terms and concepts
- identify relationships and keys on common and human resources business concept diagrams
- explain the concept, data, frequency, indexes and data sources involved in reporting views
- list composite and slotted views
- describe ssr human resources report templates.

Intended audience

- Department Functional/Technical Staff - Internal designated report writers
- Department Managers, IT Department Support Staff - responsible for report writing



Section A: Human Resources Metadata

Lesson: Overview (Continued)

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Description

Human Resources metadata is information describing the data in tables. Metadata consists of information such as the source and targets of data.

Human Resources Metadata Reports

The Human Resources metadata reports to choose from are shown below.

Human Resources Reporting View Meta Data Reports

Target Reports:

<u>Reporting View</u>	<u>Description</u>	<u>Key & Frequency</u>	<u>Recommended Search Columns</u>
BARGAINING_UNIT	Contains bargaining unit information related to an employee.	One row per person per bargaining unit per effective date.	PERSON_UID
BARG_UNIT_SLOT	Uses data from the BARG_UNIT reporting view. Displays up to 3 sets of values based on the defined display rule(s) with an internal group of BARGAINING UNIT and a delivered or institution defined internal code. Delivered internal codes of PAYRBARG may be used independently by the institution.	One row per person per profile code per bargaining unit rule.	ACTIVITY_DATE PERSON_UID, PROFILE_CODE, BARG_UNIT
BENEFICIARY_DEPENDENT	Contains employee beneficiary information.	One row per person per beneficiary per sequence number per relationship.	PERSON_UID
BENEFICIARY_SLOT	Uses data from the BENEFICIARY_DEPENDENT view, displays up to five sets of values pertaining to beneficiaries.	One row per person per carrier.	PERSON_UID, CARRIER ACTIVITY_DATE
BENEFIT_DEDUCTION	Contains employee benefit deduction detail.	One row per person per carrier per effective date.	PERSON_UID, PAYROLL_DEDUCTION_YEA PERSON_UID, CARRIER, EFFECTIVE_DATE
EMPLOYEE	Contains current employee data.	One row per person.	PERSON_UID HOME_ORGANIZATION_CHART, HOME_O CURRENT_HIRE_DATE PERSON_UID, POSITION, JOB_SUFFIX, EFFE POSITION, JOB_SUFFIX SUPERVISOR_UID



Section A: Human Resources Metadata

Lesson: Overview (Continued)

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Human Resources Metadata Reports, continued

EMPLOYEE_EARNING_CY	Contains earnings information for the employee for the calendar year..	One row per person per position per job suffix per calendar year per earnings.	PERSON_UID, CALENDAR_YEAR, EMPLOYER,
EMPLOYEE_EARNING_FY	Contains earnings information for the employee for the fiscal year.	One row per person per position per job suffix per employer per fiscal year per quarter per month per earnings.	PERSON_UID, FISCAL_YEAR, EMPLOYER, POS
EMPLOYEE_POSITION	Contains assignment details for an employee's current and historical positions.	One row per person per position per job suffix per effective date.	PERSON_UID, POSITION, SUFFIX SALARY_GROUP PERSON_UID, POSITION, JOB_SUFFIX, EFFEC TIMESHEET_ORGANIZATION, POSITION, JOE PAY_CODE, POSITION, JOB_SUFFIX POSITION SUPERVISOR_UID
EMPL_EARN_CY_SLOT	Uses data from the EMPL_EARN_CY reporting view. Displays up to 8 sets of values based on the defined display rule(s) with an internal group of EARNING and a delivered or institution defined internal code. Delivered internal codes of PAYREARN may be used independently by the institution.	One row per entity per profile code per earning_rule.	PERSON_UID, PROFILE_CODE, CALENDAR_YE ACTIVITY_DATE
FACULTY_APPOINTMENT_HISTORY	Provides historical information about faculty appointments.	One row per person per action date.	PERSON_UID, APPOINTMENT_ACTION_DATE
FACULTY_RANK_HISTORY	Provides historical information about faculty rankings.	One row per person per action date.	PERSON_UID, RANK_ACTION_DATE
FACULTY_SABBATICAL_HISTORY	Provides historical information about faculty sabbaticals.	One row per person per action date.	PERSON_UID, SABBATICAL_ACTION_DATE
FACULTY_TRACKING	Faculty Tracking contains a snapshot view of general faculty information combined with the most recent (if any) appointment, rank and sabbatical information	One row per person.	PERSON_UID, APPOINTMENT_ACTION_DATE PERSON_UID, RANK_ACTION_DATE PERSON_UID, SABBATICAL_ACTION_DATE
HR_APPLICATION	Contains application information for job applicants.	One row per person per position applied per requisition number.	PERSON_UID, REQUISITION_NUMBER, POSITI



Section A: Human Resources Metadata

Lesson: Overview (Continued)

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Metadata Report

Upon clicking one of the Human Resources metadata reports, that report will run and appear onscreen. The example below shows the Human Resources EMPLOYEE report.

SGHE Operational Data Store
Reporting View Target: EMPLOYEE

Description	Contains current employee data.
Key & Frequency	One row per person.
Recommended Search Columns	PERSON_UID HOME_ORGANIZATION_CHART, HOME_ORGANIZATION, PERSON_UID CURRENT_HIRE_DATE PERSON_UID, POSITION, JOB_SUFFIX, EFFECTIVE_DATE POSITION, JOB_SUFFIX SUPERVISOR_UID

Target Column	Business Definition	Database Data Type	Source Name	Source Column
ACTIVE_JOBS_COUNT	Count of the number of active jobs for this employee.	NUMBER	FUNCTION	MPKFUNC.F_COUNT_ACTIVE_JOBS
ADJUSTED_SERVICE_DATE	Date used to determine years of service for leave accrual if the first hire date and current hire date are not equal.	DATE	PEBEMPL	PEBEMPL_ADJ_SERVICE_DATE
ADMINISTRATIVE_GROUP	Organization-oriented identifier for the record used to determine access authorization to this record. Institution defined.	VARCHAR2 (255)	NA	NA
BARGAINING_UNIT_COUNT	Count of bargaining units.	NUMBER	FUNCTION	MPKFUNC.F_COUNT_BARG_UNIT
BENEFIT_CATEGORY	Benefit category to	VARCHAR2	PEBEMPL	PEBEMPL_BCAT_CODE



Section B: Oracle Basic Terms and Concepts

Lesson: Overview

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Oracle Terms and Concepts

1) Composite and Slotted Tables

ODS Composite Table

- Match element-to-element to the Banner source Composite Views
- Loaded and refreshed from Banner
- Represent a conceptual organizational structure such as Student or a Receivable Customer
- Fine grained access can be applied to them

ODS Slotted Table

- Stores data values for a specific code related to a base table such as test scores
- Used to de-normalize repeating concepts
- Populated from rules in MGRSDAX
- Optimizes speed of queries

2) Views

- A view is a virtual table. It does not physically exist. Rather, it is created by a query joining one or more tables.
- Data from each ODS composite table is presented in one or more reporting views. The ODS reporting views are the views that end users will use to create reports within the ODS. Users will point their report writing tool at these views and build reports.

3) Joins

Inner Join (simple join)

The most common type of join. Inner joins return all rows from multiple tables where the join condition is met.

Outer Join

Returns all rows from one table and only those rows from a secondary table where the joined fields are equal (join condition is met.)

4) Metadata

Tells what data columns are in the ODS, a definition of their business use, the type of data (number, character, date, etc.), how long they are, where they come from (in the source system) and their destination (in the target system.)



Section B: Oracle Basic Terms and Concepts

Lesson: Overview (Continued)

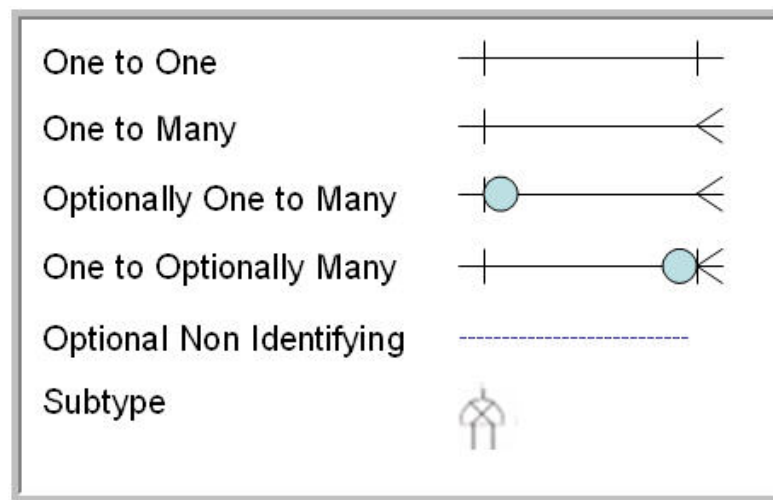
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Oracle Terms and Concepts, continued

5) Display Rules

- Enable you to control and customize how data stored in your ODS composite tables is displayed in your Reporting views
- Determine the positional location of data in a view, or the hierarchical order in which a particular type of data should be retrieved
- “Positional” display rules are required for all Slotted views
- “Hierarchical” display rules are required for a sub-set of (non-slotted) Reporting views
- Also some used to determine a value stored in either an ODS composite table or displayed in an ODS Reporting view
- Stored in the ODS database table – MGRSDAX

6) ERD Rules of Cardinality



Note: SunGard Higher Education refers to ERDs as Business Concept Views



Section B: Oracle Basic Terms and Concepts

Lesson: Overview (Continued)

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Oracle Terms and Concepts, continued

7) Primary and Foreign Keys

- A **primary** key is a single field or combination of fields that uniquely defines a record. None of the fields that are part of the primary key can contain a null value. A view can have only one primary key.
- A **foreign** key means that values in one table must also appear in another table. The referenced table is called the parent table while the table with the foreign key is called the child table.

8) Index

- An index is a performance-tuning method of allowing faster retrieval of records
- An index creates an entry for each value that appears in the indexed columns.

9) Cartesian Product

- A Cartesian join is when you join every row of one view to every row of another view.
- A Cartesian join is very CPU intensive, and is usually done by mistake.



Section C: Common Business Concepts Diagrams

Lesson: Reporting and Slotted Views

◀ [Jump to TOC](#)

7 Entity Relationship Diagrams:

- 1) Event
- 2) Institution*
- 3) Organization Entity
- 4) Person Demographic*
- 5) Person Role*
- 6) Person Supplemental*
- 7) Relationship

*Pertain to Human Resources

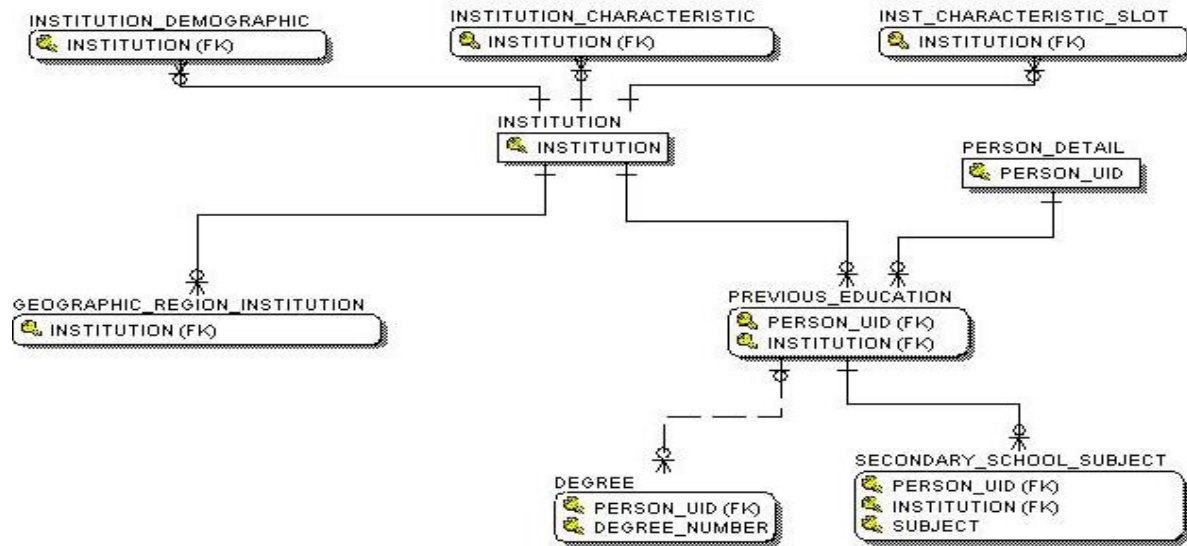


Section C: Common Business Concepts Diagrams

Lesson: Reporting and Slotted Views

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Institution Diagram



Primary View

Contains all data that is common to institutions across administrative models and products. There is one row per institution.

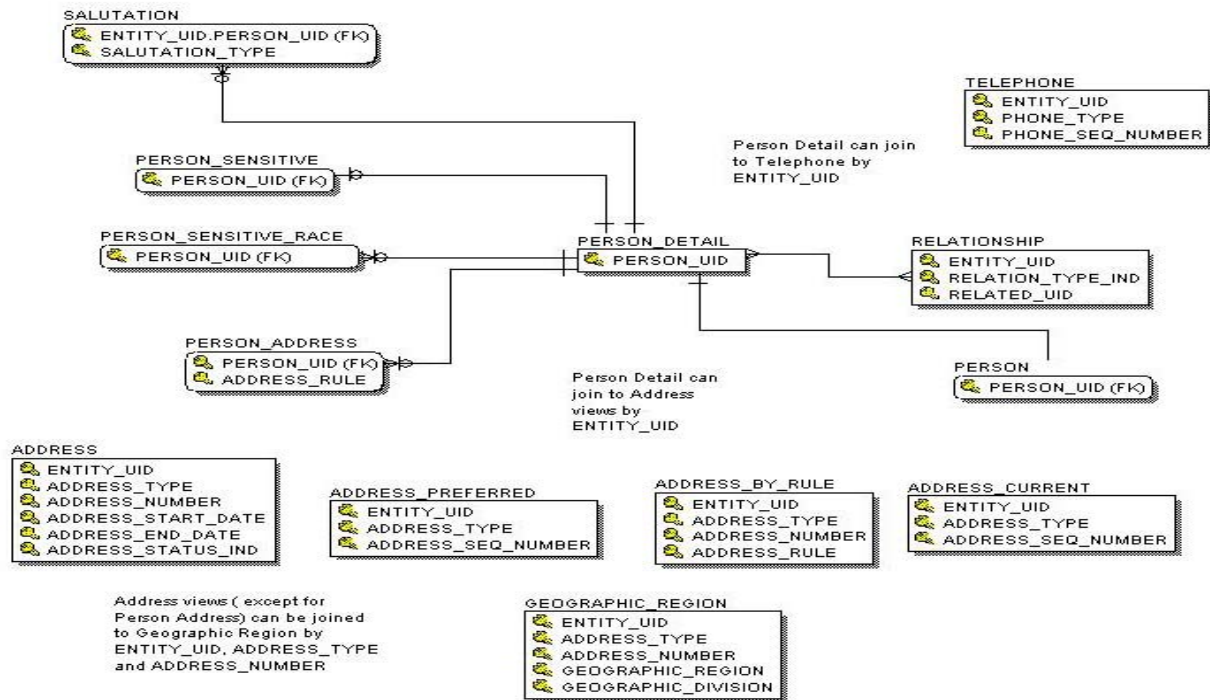


Section C: Common Business Concepts Diagrams

Lesson: Reporting and Slotted Views (Continued)

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Person Demographic Diagram



Primary View

Contains demographic data that is common to a person regardless of role(s) in the data model. Data always reflects the most current data for the person and will not track changes. Data in this view includes current name, ID, gender, birth date, tax id, international details, confidentiality indicator, etc.

There is one row per person and the data comes from the person identification (SPRIDEN) and person demographic information (SPBPERS) tables.

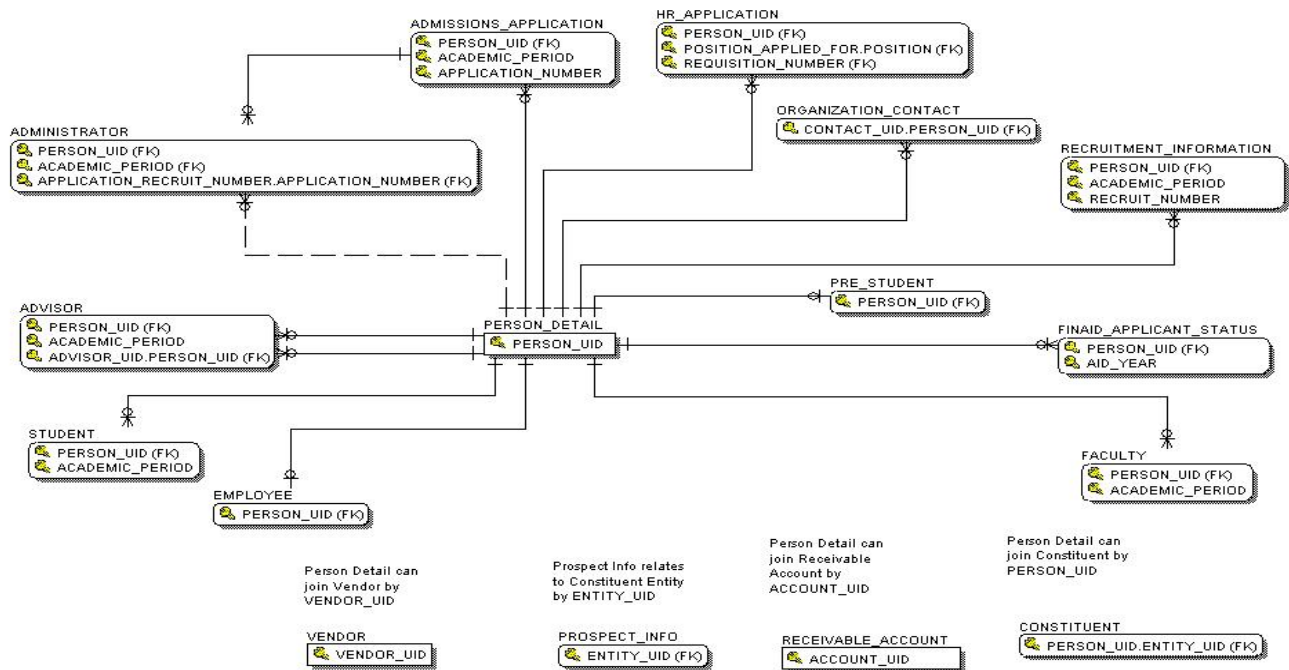


Section C: Common Business Concepts Diagrams

Lesson: Reporting and Slotted Views (Continued)

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Person Role Diagram



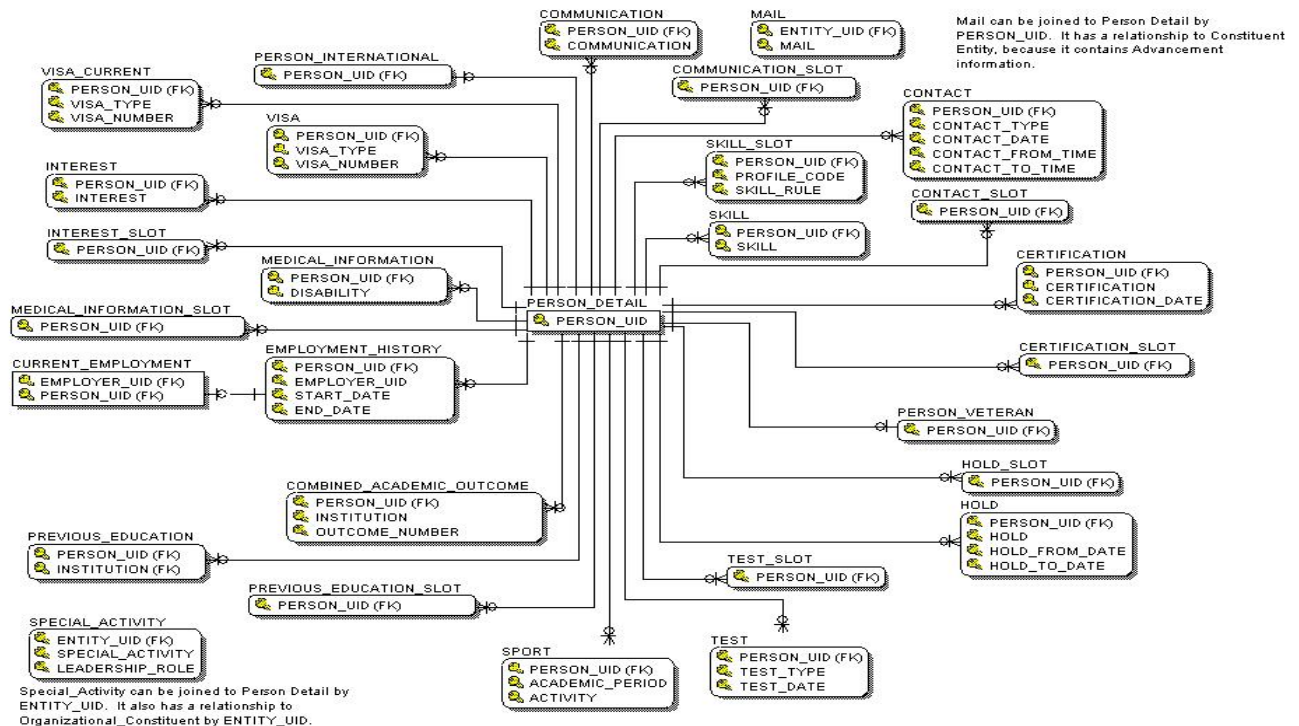


Section C: Common Business Concepts Diagrams

Lesson: Reporting and Slotted Views (Continued)

◀ Jump to TOC

Person Supplemental Diagram





Section C: Common Business Concepts Diagrams

Lesson: Address Views and their Purpose

◀ [Jump to TOC](#)

Address views

A brief description of the address views is listed below. More detailed descriptions are included on the pages that follow.

- a) **Address** contains all addresses for an entity, person, institution, or organization.
- b) **Address_By_Rule** contains all addresses for an entity/person, institution, or organization per the display rules.
- c) **Address_Current** contains all active addresses for an entity/person, institution, or organization.
- d) **Address_Preferred** contains all preferred addresses and the associated primary active telephone data for an entity/person, institution, or organization.
- e) **Geographic_Region** contains data about the geographic regions associated with the addresses of an entity.
- f) **Person** contains demographic data (including addresses) common to a person across the ODS data model and the institution enterprise.
- g) **Person_Address** contains information used to add a mailing address to a report or print a mailing label.



Section C: Common Business Concepts Diagrams

Lesson: Address Views and their Purpose (Continued)

◀ Jump to TOC

Address

- Designed to allow the user to apply whatever rules they want to retrieve any address or series of addresses.
- You must understand the rules of selection such as dates and statuses.
- It will return multiple addresses.
- This does not use the address hierarchy approach.
- Advantage - lets you select addresses for future dates (those already coded to return active addresses use the SYSDATE as the date of currency).

Address_By_Rule

- Designed to be the primary address view for use in day to day reporting.
- Will return one currently active address for entity, based on the current date.
- Utilizes the values defined within the MGRSDAX table to identify a hierarchy of addresses to select from, so that a user can get whichever hierarchy of addresses they choose based on the business need (one hierarchy for Admissions, another for Registrar, etc.).
- Set up to use the ODS profile selection, so that individuals can have their own hierarchy that overrides the address rule provided as the default.
- All addresses retrieved by this view could have the parameter set up in the reports to allow for the hierarchy of 'ADMSADDR", but specific individuals, using their own profile, can get the same report, using the same parameters, but with an overridden address hierarchy.
- Most important and most frequently overlooked, is that the ADDRESS_RULE parameter MUST be supplied (along with the UID) or the resultant retrieval will appear as a Cartesian product.

Address_Current

- Designed to allow user to get only current addresses
- Multiple addresses will be returned
- Does not use the address hierarchy approach.



Section C: Common Business Concepts Diagrams

Lesson: Address Views and their Purpose (Continued)

◀ [Jump to TOC](#)

Address_Preferred

- Designed to return only the preferred, current address for an individual.
- Sets the preferred indicator in Banner, checking first in Advancement for a preferred address type, and then defaulting to a GTVSDAX value.
- Returns all preferred addresses that are active, regardless of address type.

Geographic_Region

- Contains data about the geographic regions associated with the addresses of an entity.

Person

- Contains the Preferred Address of the person as set by the preferred address of the institution.
- Preferred Address of the institution is set in the GTVSDAX table – PREFADDR.

Person_Address

- Contains information used to add a mailing address to a report or print a mailing label. Since the main purpose of this reporting view is to support correspondence, only persons who are not deceased will appear in this reporting view. All organizations and companies that are active will be selected for this reporting view.
- This view is the primary address view indicated on metadata business concept diagrams.



Section D: Common Display Rules

Lesson: Overview

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Introduction

Display rules enable you to control and customize how data stored in your ODS composite tables is displayed in your Reporting views. Display rules determine the positional location of data in a view, or the hierarchical order in which a particular type of data should be retrieved. “Positional” display rules are required for all Slotted views while “hierarchical” display rules are required for a sub-set of (non-slotted) Reporting views. There are also a number of display rules used to determine a value stored in either an ODS composite table or displayed in an ODS Reporting view. All display rules are stored in the ODS database table - MGRSDAX.

<u>GTVSDAX</u>	<u>MGRSDAX</u>
GRDCHGHOLD	HOLDS
COMMINST	INST
COMMRACE	RACE

Procedure

Follow these steps to set up a display rule.

Step	Action
1	From the Information Access Administrative menu, select Preferences & Security .
2	Select Set Up Data Display Rules . The Set Up a Display Rule page opens.
3	Select Create from the Set Up a Display Rule page . The Create a New Display Rule page opens.
4	Enter the information for the new display rule, or select an existing code from one of the drop-down lists.
5	Click the Save button. The Update an Existing Display Rule page opens.



Section E: Human Resources Business Concept Diagrams

Lesson: Human Resources Application

◀ [Jump to TOC](#)

5 Business Concept Diagrams

- Employee
- Human Resource Application
- Human Resource Faculty
- Payroll
- Position

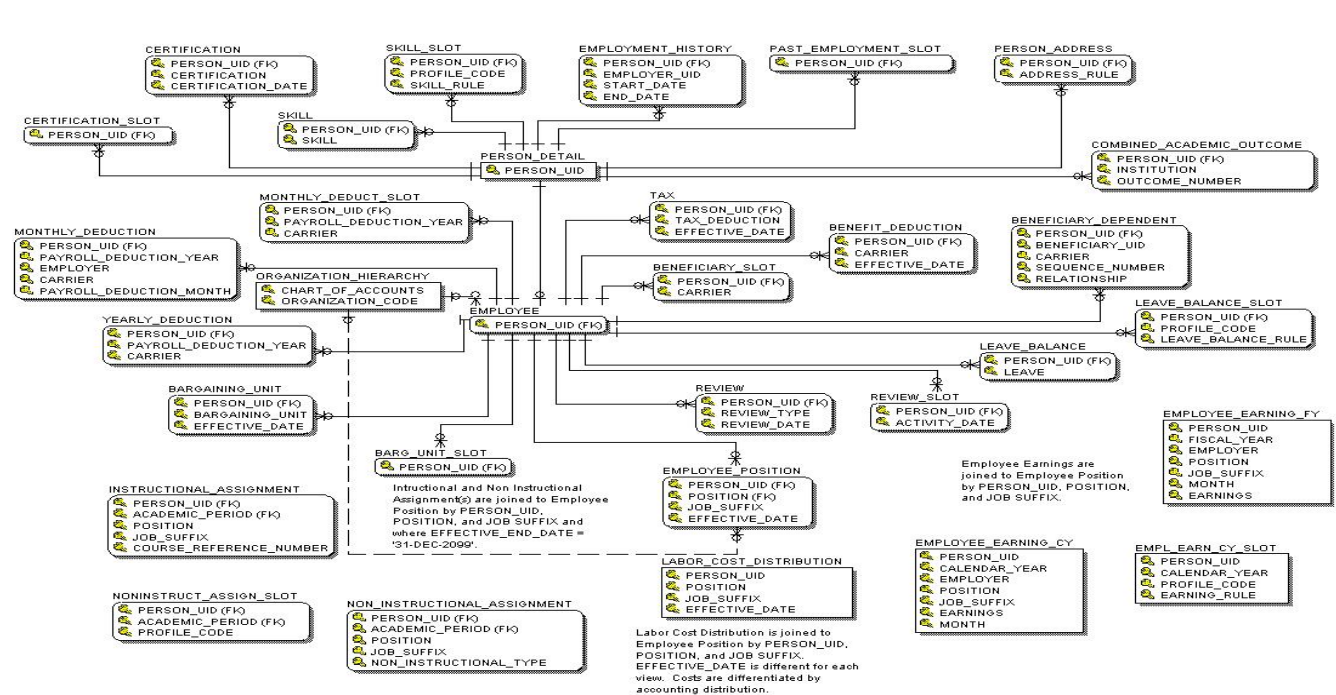


Section E: Human Resources Business Concept Diagrams

Lesson: Employee Diagram

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Employee Diagram



Primary View

Contains organizational information on the employee, hire dates, review dates, and immigration information. Data includes employee primary position, start date and details.

There is one row per employee. The source of the data is the Employee Base Table (PEBEMPL), Assignment Repeating Table (NBRJOBS), Assignment Repeating Base Table (NBRBJOB), and Employee Review Type Repeating Table (PERREVW).

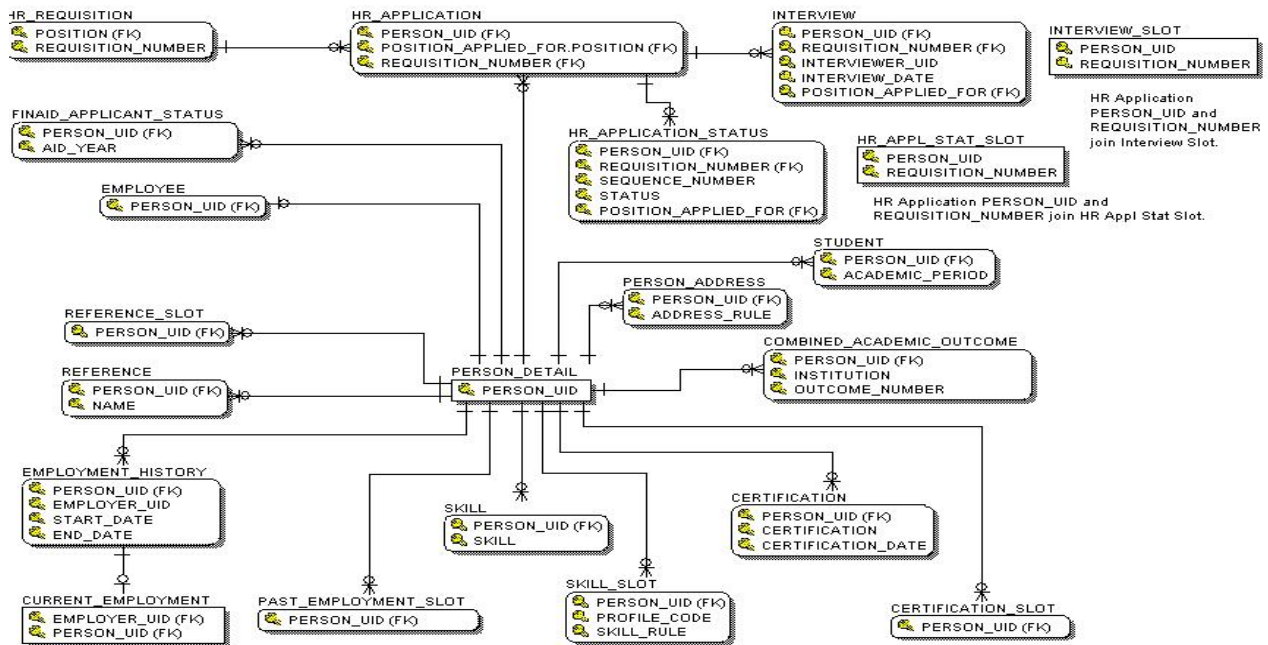


Section E: Human Resources Business Concept Diagrams

Lesson: Human Resource Application Diagram

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Human Resource Application Diagram



Primary View

Contains application information for job applicants. The data includes Person ID, Requisition Number, Position Applied for, Position Class, Title, Application Date, Requisition Status, Interview Count, Reference Count, Skill Count.

There is one row per person that applies for a position and the source of the data is the Applicant Base Table (PABAPPL), and Position Requisition Table (PABREQU).

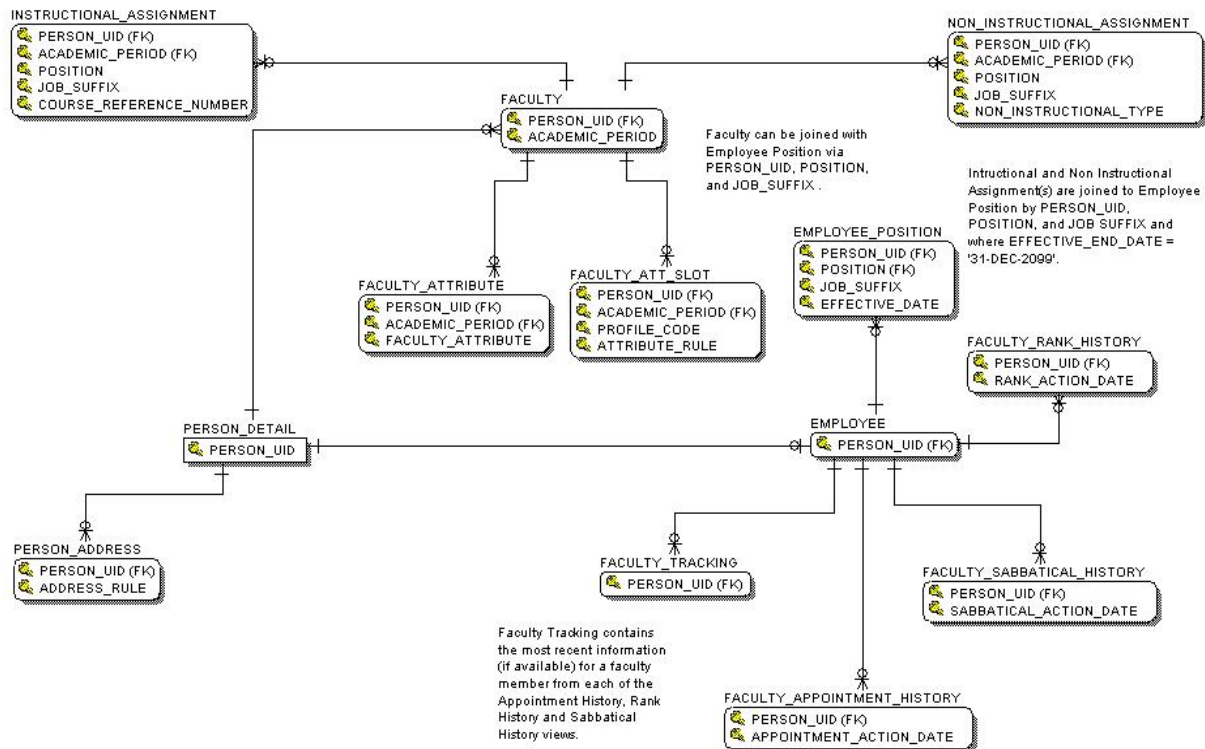


Section E: Human Resources Business Concept Diagrams

Lesson: Human Resource Faculty Diagram

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Human Resource Faculty Diagram



Primary View

Contains detail information from the student administration arena for the academic staff member. The staff members assignments can be viewed and reported using the INSTRUCTIONAL ASSIGNMENT and NON INSTRUCTIONAL ASSIGNMENT reporting view.

There is one row per faculty member per academic period.

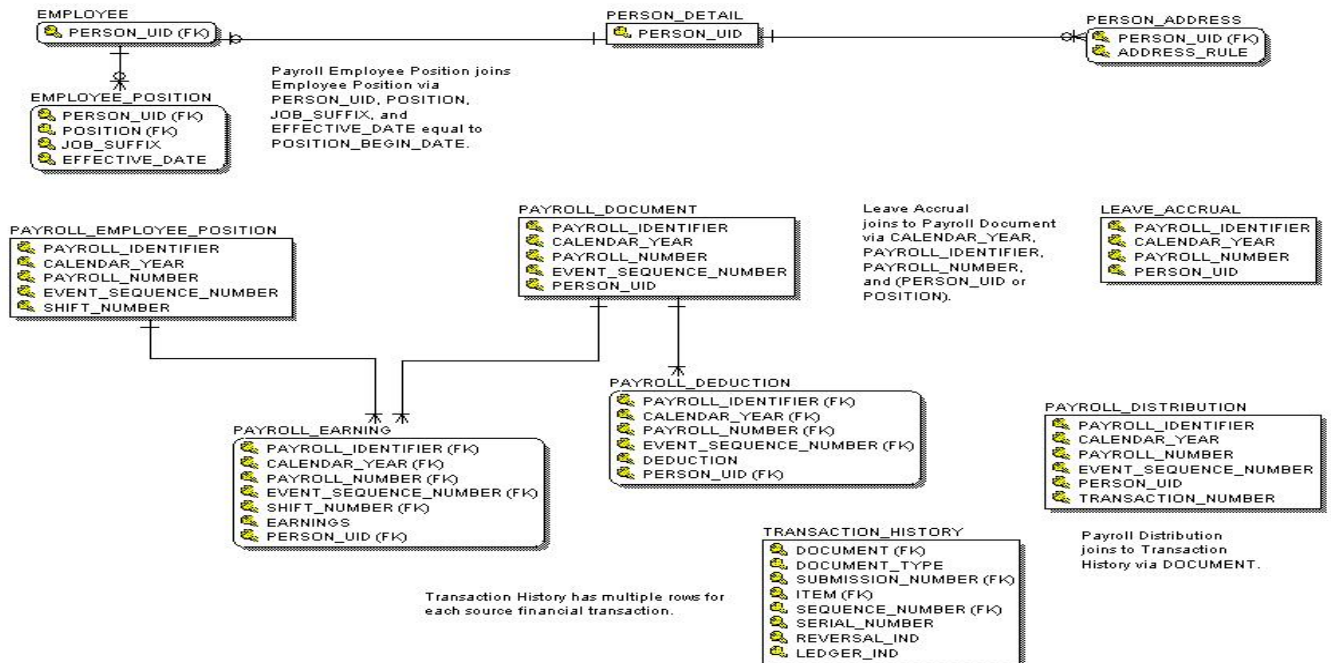


Section E: Human Resources Business Concept Diagrams

Lesson: Payroll Diagram

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Payroll Diagram



Primary View

Created to list all relevant payroll document/direct deposit data. Data includes Payroll Identifier (PICT_CODE), Calendar Year, Payroll Number, ID, Name, Document Number, Document Net Amount, Bank Routing Number, Bank Account Number, Bank Account Type.

There is one row per payroll identifier, per calendar year, per payroll number, per event sequence number, per bank account type, per bank account number. The source of the data is the Document Number Repeating Table (PHRDOCM).

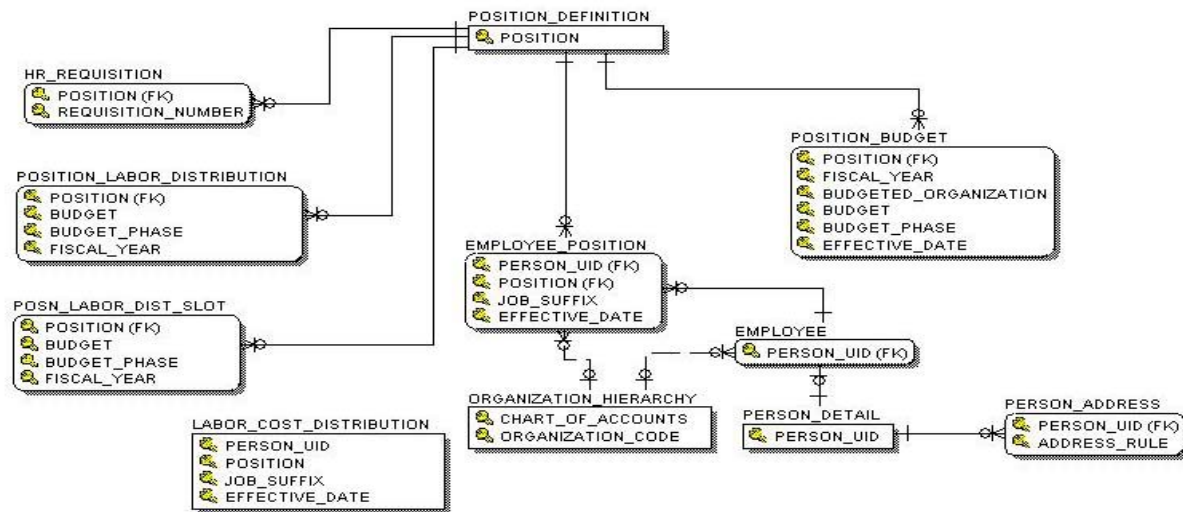


Section E: Human Resources Business Concept Diagrams

Lesson: Position Diagram

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Position Diagram



Labor Cost Distribution is joined to Employee Position by PERSON_UID, POSITION, and JOB SUFFIX. EFFECTIVE_DATE is different for each view. Costs are differentiated by accounting distribution.

Primary View

Contains detailed information concerning open and filled positions at the institution. Data includes Position, Position Class, Position Status, Position Title, Position Type, Position Group, Position Location, Position Employee Class.

There is one row per position. The source of the data is the Position Base Table (NBBPOSN), and Position Classification Rule Table (NTRPCLS).



Section F: Human Resources Display Rules

Lesson: Overview

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Rules

The Human Resources display rules are listed below.

GTVSDAX

PAYRADDR

PAYRBARG

PAYRPROF

PAYRYEAR

PAYREARN

PAYRPROF

PAYRYEAR

PAYRPROF

PAYRTYPEYR

PAYRYEAR

PAYRLEAV

PAYRSKIL

MGRSDAX

ADDRESS

BARGAINING UNIT

DEDUCTION/BENEFIT

DEDUCTION/BENEFIT

EARNING

EMPLOYEE PROFILE

EMPLOYEE PROFILE

EMPLOYMENT VERIFIC

EMPLOYMENT VERIFIC

EMPLOYMENT VERIFIC

LEAVE

SKILL

Note: All dates from the “Reporting Date” column in GTVSDAX and MGRSDAX should either be deleted or set to a date for a specific query.



Section G: Human Resources Awards Self Service Reporting Templates

Lesson: Overview

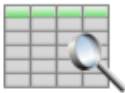


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Purpose

This report template uses reporting views from the Employee Business Concept Diagram. Data includes information about contact, demographic and primary position information for employees.

Procedure

Follow these steps to view Human Resources award data using the template provided.

Step	Action
1	<p>Access the Human Resources Self Service Reporting application by clicking the Human Resources Templates link.</p> <p><u>Self-Service Reporting</u></p>  <ul style="list-style-type: none"> ▶ Accounts Receivable Templates ▶ Advancement Templates ▶ Finance Templates ▶ Financial Aid Templates ▶ Human Resources Templates ▶ Student Templates
2	<p>Click the Employee link.</p>  <p>▶ Employee This report template uses reporting views from the Employee Business Concept Diagram. Data includes information about contact, demographic and primary position information for employees. </p>



Section G: Human Resources Awards Self Service Reporting Templates

Lesson: Overview (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
3	<p>Enter your Search Criteria by clicking the appropriate link.</p>




Section G: Human Resources Awards Self Service Reporting Templates

Lesson: Overview (Continued)

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Procedure, continued

Step	Action																																																																																																																																		
4	After you have entered your search criteria, click the Search button.																																																																																																																																		
5	<p>View the results of the search.</p>  <table border="1" data-bbox="300 835 1502 1304"> <thead> <tr> <th>Detail Reports</th> <th>ID</th> <th>Name ▲</th> <th>Status</th> <th>Employee Class</th> <th>Employee Class Desc</th> <th>Leave Category</th> <th>Benefit Category</th> <th>Home Organization Chart</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td>71000011</td> <td>Adams, Eugene V.</td> <td>Active</td> <td>01</td> <td>FT Administrative</td> <td>Administrators - Full Time</td> <td>Full Time Employees</td> <td>B</td> <td>Office of</td> </tr> <tr> <td></td> <td>71000015</td> <td>Barton, Barbara</td> <td>Active</td> <td>13</td> <td>PT Clerical</td> <td>Clerical</td> <td>Part Time Employees</td> <td>B</td> <td>Div of Hc</td> </tr> <tr> <td></td> <td>71000005</td> <td>Brown, Lisa M.</td> <td>Active</td> <td>01</td> <td>FT Administrative</td> <td>Administrators - Full Time</td> <td>Full Time Employees</td> <td>B</td> <td>Office of</td> </tr> <tr> <td></td> <td>71000003</td> <td>Burns, Linda</td> <td>Active</td> <td>07</td> <td>Contracted Full-time Faculty</td> <td>Faculty</td> <td>Full Time Employees</td> <td>B</td> <td>Office of</td> </tr> <tr> <td></td> <td>71000022</td> <td>Clark, Benjamin</td> <td>Active</td> <td>01</td> <td>FT Administrative</td> <td>Administrators - Full Time</td> <td>Full Time Employees</td> <td>B</td> <td>Departr</td> </tr> <tr> <td></td> <td>71000016</td> <td>De Vita, Patricia</td> <td>Active</td> <td>01</td> <td>FT Administrative</td> <td>Administrators - Full Time</td> <td>Full Time Employees</td> <td>B</td> <td>Transpo</td> </tr> <tr> <td></td> <td>71000025</td> <td>Durr, Nancy</td> <td>Active</td> <td>01</td> <td>FT Administrative</td> <td>Administrators - Full Time</td> <td>Full Time Employees</td> <td>B</td> <td>Departr</td> </tr> <tr> <td></td> <td>71000020</td> <td>England, Kenneth</td> <td>Active</td> <td>11</td> <td>PT Administrative</td> <td>Administrators - Full Time</td> <td>Full Time Employees</td> <td>B</td> <td>Dept of /</td> </tr> <tr> <td></td> <td>71100079</td> <td>Fernandes, Rosita</td> <td>Active</td> <td>06</td> <td>FT Security</td> <td>Security - Full Time</td> <td>Full Time Employees</td> <td>B</td> <td>Campus</td> </tr> <tr> <td></td> <td>71100078</td> <td>Ferrini, Frederick</td> <td>Active</td> <td>05</td> <td>FT Union 810</td> <td>Maintenance - Full Time</td> <td>Union Benefits (Full Time)</td> <td>B</td> <td>Janitorial</td> </tr> <tr> <td></td> <td>71100081</td> <td>Gardner, Sally</td> <td>Active</td> <td>18</td> <td>Students</td> <td>Ineligible</td> <td>Ineligible for Benefits</td> <td>B</td> <td>Student</td> </tr> <tr> <td></td> <td>71000023</td> <td>Goodhart, Gerald</td> <td>Active</td> <td>01</td> <td>FT Administrative</td> <td>Administrators - Full Time</td> <td>Full Time Employees</td> <td>B</td> <td>Office of</td> </tr> </tbody> </table>	Detail Reports	ID	Name ▲	Status	Employee Class	Employee Class Desc	Leave Category	Benefit Category	Home Organization Chart			71000011	Adams, Eugene V.	Active	01	FT Administrative	Administrators - Full Time	Full Time Employees	B	Office of		71000015	Barton, Barbara	Active	13	PT Clerical	Clerical	Part Time Employees	B	Div of Hc		71000005	Brown, Lisa M.	Active	01	FT Administrative	Administrators - Full Time	Full Time Employees	B	Office of		71000003	Burns, Linda	Active	07	Contracted Full-time Faculty	Faculty	Full Time Employees	B	Office of		71000022	Clark, Benjamin	Active	01	FT Administrative	Administrators - Full Time	Full Time Employees	B	Departr		71000016	De Vita, Patricia	Active	01	FT Administrative	Administrators - Full Time	Full Time Employees	B	Transpo		71000025	Durr, Nancy	Active	01	FT Administrative	Administrators - Full Time	Full Time Employees	B	Departr		71000020	England, Kenneth	Active	11	PT Administrative	Administrators - Full Time	Full Time Employees	B	Dept of /		71100079	Fernandes, Rosita	Active	06	FT Security	Security - Full Time	Full Time Employees	B	Campus		71100078	Ferrini, Frederick	Active	05	FT Union 810	Maintenance - Full Time	Union Benefits (Full Time)	B	Janitorial		71100081	Gardner, Sally	Active	18	Students	Ineligible	Ineligible for Benefits	B	Student		71000023	Goodhart, Gerald	Active	01	FT Administrative	Administrators - Full Time	Full Time Employees	B	Office of
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Section H: Exercise

Lesson: Run Human Resources Sample Reports

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Sample Reports Exercise

Run the following sample reports using the Report Name, Business Concept Diagrams and Joins, Views and Data Columns, and Parameters, Groups and Filters.

Report Name	Business Concept Diagram and Joins	Views and Data Columns	Parameters, Groups, Filters, etc.
Budgeted Positions	<p>Position BCD</p> <p>Join Position_Definition to Position_Budget and Employee_Position (using Position)</p>	<p>Position_Definition Position, Position_Title</p> <p>Position_Budget Budgeted_Organization, Position_FTE, Amount_Budgeted, Fiscal_Year, Budget_Phase</p> <p>Employee_Position Job_Suffix, Effective_Start_Date</p>	<p>Parameters Fiscal_Year</p> <p>Groups Budgeted_Organization, Budget_Phase</p> <p>Filters Effective_Start_Date<=Sysdate</p>
Dependents Turning Age 25	<p>Employee BC</p> <p>Join Person_Detail to Employee (using Person_UID)</p> <p>Join Employee to Benefit_Deduction and Beneficiary_Dependent (using Person_UID)</p>	<p>Person_Detail ID</p> <p>Employee Name, Employee_Class</p> <p>Benefit_Deduction Carrier, Option1, Option2, Option3, Option4, Option5</p> <p>Beneficiary_Dependent Beneficiary_Name, Beneficiary_Birthdate, Relationship</p>	<p>Filters Carrier in (Medical/Dental codes) Beneficiary_Birthdate>=(25year date) Relationship=C</p>



Section H: Exercise

Lesson: Run Human Resources Sample Reports (Continued)

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Sample Reports, continued

Report Name Employees Eligible for 10 Year Pin	Business Concept Diagram and Joins Employee BCD	Views and Data Columns Employee Name, ID, Service_Years	Parameters, Groups, Filters, etc. New Fields Define ServCalc=Service_Years -11 Filters ServCalc <2 and >= 1
Group Insurance Enrollment	Employee BCD	Benefit_Deduction ID, Name, Carrier_Short_Desc, Coverage_Option, Effective_End_Date	Sorts Coverage_Option, Name Filters Carrier= (code), Effective End Date > (date) or is missing
I-9 Report for Non-Resident Aliens	Employee BC Join Person_Detail to Telephone and Employee (using Person_UID)	Person_Detail ID, Email_Preferred_Address Employee Name, Employee_Class, Immigration_Status, Immigration_Status_Desc, Immigration_Date, Immigration_Expiration_Date , Home_Organization Telephone Phone_Number_Combined, Phone_Type	Filters Phone_Type = CE



Section H: Exercise

Lesson: Run Human Resources Sample Reports (Continued)

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Sample Reports, continued

Report Name	Business Concept Diagram and Joins	Views and Data Columns	Parameters, Groups, Filters, etc.
Vacation	Employee BCD	Employee	Sorts
Leave	Join Employee to Leave_Balance , and Payroll_Document (using Person_UID)	ID, Name, Home_Organization_Desc, Supervisor_Name	Home_Organization_Desc, Supervisor_Name, Name
	Join Payroll_Document to Leave_Accrual (using Person_UID, Calendar_Year, Payroll_Identifier, and Payroll_Number)	Leave_Balance Leave, Beginning_Balance, Time_Taken	New Fields Define AvailBal=Beginning_Balance-Time_Taken
		Payroll_Document Payroll_Identifier, Payroll_Number	Filters Leave=(vacation code), Payroll_Identifier=(code), Payroll Number=(code)
		Leave_Accrual Time_Accrued	



Section H: Exercise

Lesson: Run Human Resources Sample Reports (Continued)

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Sample Reports Exercise, continued

Report Name	Business Concept Diagram and Joins	Views and Data Columns	Parameters, Groups, Filters, etc.
Expected Family Contribution	Human Resources Application BCD	Need_Analysis ID, Name, Total_Family_Contribution_Fed, INAS_TFC, Aid_Year	Parameters Aid_Year Calculated Fields FED_INAS_Match=If Total_Family_Contribution_Fed <> INAS_TFC TFC=If Total_Family_Contribution_Fed is missing then 0, else Total_Family_Contribution_Fed



Section I: Appendix

Lesson: 55 Reporting and Slotted Common Views

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Purpose

The table below lists the 55 reporting and slotted common views.

Activity	Hold	Person International
Address	Hold_Slot	Person_Sensitive
Address_By_Rule	Institution	Person_Sensitive_Race
Address_Current	Institution_Characteristic	Person_Sensitive_Race_Slot
Address_Preferred	Institution_Demographic	Person_Veteran
Certification	Inst_Characteristic_Slot	Previous_Education
Certification_Slot	Interest	Previous_Education_Slot
Combined_Academic_Outcome	Interest_Slot	Relationship
Communication (Mailing)	Mail	Salutation
Communication_Slot	Mail_Slot	Secondary_School_Subject
Contact	Medical_Information	Skill
Contact_Slot	Medical_Information_Slot	Skill_Slot
Current_Employment	Organization_Entity	Telephone
Cross_Reference_Slot	Organization_Entity_Address	Test
Employment_History	Past_Employment_Slot	Test_Slot
Event	Person	Validation
Geographic_Region	Person_Address	Visa
Geographic_Region_Institution	Person_Detail	Visa_Current
		Year_Type_Definition



Section I: Appendix

Lesson: 41 Reporting And Slotted HR Views

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Views

Bargaining_Unit	Barg_Unit_Slot
Beneficiary_Dependent	Beneficiary_Slot
Benefit_Deduction	Employee
Employee_Earning_CY	Employee_Earning_FY
Employee_Position	Empl_Earn_CY_Slot
Faculty_Appointment_History	Faculty_Rank_History
Faculty_Sabbatical_History	Faculty_Tracking
HR_Application	HR_Application_Status
HR_Appl_Stat_Slot	HR_Requisition
Interview	Interview_Slot
Labor_Cost_Distribution	Leave_Accrual
Leave_Balance	Leave_Balance_Slot
Monthly_Deduction	Monthly_Deduct_Slot
Payroll_Deduction	Payroll_Distribution
Payroll_Document	Payroll_Earning
Payroll_Employee_Position	Position_Budget
Position_Definition	Position_Labor_Distribution
Posn_Labor_Dist_Slot	Reference
Reference_Slot	Review
Review_Slot	Tax
Yearly_Deduction	



Release Date

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This workbook was last updated on 10/15/2007.