SAP Business Warehouse/Business Intelligence Reporting

Running BW/BI Reports From HRMS Portal

Washington State HRMS Business Warehouse/Business Intelligence (BW/BI) Self-Paced Learning Materials
General Topics - BW/BI End Users/Power Users
Running BW/BI Custom Reports - Overview

The Running BW/BI Custom Reports section provides an overview for running BW/BI Custom Reports from the HRMS Portal.

Topics covered in this section include:

- Running BW/BI Custom Reports
  - Accessing Reports from the HRMS Portal
  - Selecting a Report
  - Report Variables
  - Selecting Multiple Variables
  - Deleting Variables
  - Running a Report

- Defining BW/BI Custom Report Variables
  - Position-Personnel Master Listing
  - Position Statistics Report-Month Ending
  - Position Roster
  - Employee History
  - Class Distribution-Pay Class
  - Classification Turnover
  - Supervisor to Employee
  - Employee Summary
  - Employee File Statistics
  - Appointment Status Changes
  - Affirmative Action
  - HRM Performance Measurement reports
Accessing Reports from the HRMS Portal

The HRMS Portal is used to access Business Intelligence reports. Instructions for logging on to the HRMS Portal are in Section 5: Logging on to HRMS Portal.

The diagram below provides a sample of the screen displayed once the user has logged on to the HRMS Portal:

- Business Intelligence categories contain reports associated with that category.
- Click on “Business Intelligence” to view categories.
- The first BW/BI Report under the Organization Management category will be selected by default.
- The Detailed Navigation pane displays the list of BW/BI reports to choose from.
- The report pane displays the report variable selection criteria, as well as the report results when a report is run.

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Accessing Reports from the HRMS Portal

BW/BI Custom Reports are located in the following categories under the BI Reports tab:

<table>
<thead>
<tr>
<th>Organization Management</th>
<th>Personnel Administration</th>
<th>Layoff Data</th>
<th>Financials</th>
<th>HRM Performance Measurement</th>
<th>Grievance</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Position-Personnel Master Listing</td>
<td>- Affirmative Action</td>
<td>- Baseline for Layoff Seniority Calculations Report</td>
<td>- Distribution of Payroll and Related Costs</td>
<td>- Plan and Align Workforce</td>
<td>- Grievance Details Report</td>
</tr>
<tr>
<td>- Position Roster</td>
<td>- Employee/Position Status</td>
<td>- LWOP Reduction in Force Activity</td>
<td></td>
<td>- Deploy Workforce</td>
<td>- Grievance Totals by Agency Report</td>
</tr>
</tbody>
</table>

Note: there are no BI reports under the Time Management or Payroll categories.
Selecting a Report

To select a report:

1. Click the BI Reports category tab.
2. Click the report name link from the Detailed Navigation pane.
3. A variables selection box will appear to allow the user to enter variables (selection criteria) for the report they wish to run:
Selecting a Report

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For reports with multiple queries, a report folder will contain all queries of the report. For example, BW/BI Custom Reports with multiple queries include:

- Affirmative Action
- Employee File Statistics
- Employee/Position Status

To run a report query alone:

1. Click the report query link.
   For example, click the Employee File Statistic - Age Ranges link rather than Employee file Statistics - All Reports link

To run a report with all report queries at once:

2. Click the report with the “All Reports” link.

Click the Expand and Collapse buttons to expand and collapse report folders.

All Affirmative Action queries must be run separately
Variables are report selection criteria and must be entered prior to running a report. Variables identified with an asterisk are required fields. The user may enter variables manually or click on the matchcode button to select a variable from a list.

The user may manually enter the variable, or click the matchcode button to bring up a list to choose from.

Use the “Search” feature to find a specific variable. OR

Click the desired variable from the list.
Selecting Multiple Variables

To select multiple variables, click the “matchcode” button to add multiple variables of the same type.

Select the multiple values you need and click Add

Result: Multiple values have been added
Deleting Variables

To remove a variable that was entered in error or replace the current variable, the variable can be removed two ways:

1. Highlight the variable, select the delete or backspace key to delete that variable.
2. Select the matchcode button. Select the variables that need to be deleted and click the “Remove” button.

Result: Variables have been deleted

Variable values can be highlighted and deleted by pressing Delete or Backspace on the keyboard.

Select the variables to be removed, click the “Remove” button and click OK.
Personalizing Variables

Users have the ability to personalize variables from the HRMS Portal. Personalizing variables allows the user to save the variable setting they have entered.

Personalizing a variable for one report will personalize the same variable for all other reports if that variable is used. For example, in the illustration below the user is personalizing the Personnel Area (Optional) variable. Once the Personnel Area (Optional) variable has been personalized, the same values will be used for the Personnel Area (Optional) variable when any other reports that use it are run.

Once a variable is personalized, it is no longer displayed on the variables screen. See Removing Personalized Variables for information on removing a personalized variable.

Click the “Show Variable Personalization” link to personalize a variable.
Personalizing Variables

The example below uses the Employees with Projected 5+ Service Years report to show how to Personalize the Personnel Area variable:

1. Enter the Personnel Area Variable(s).
2. Click the “Select” button for the variable.
3. Select the “Add selected variables to personalized variable list”.

Result: Personnel Area is no longer available in the “General Variables” selection but has been added to the “Personalized Variable” section.
Removing Personalized Variables

To remove a Personalized Variable:

1. Select a report that contains the personalized variable that needs to be removed.
2. Click “Show Variable Personalization” link.

Result: The Personnel Area variable selection will appear.

3. Select the personalized variable to be removed
4. Click “Remove selected variables from personalized variables list”.

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Removing Personalized Variables

Result: The Personnel Area personalized variable has been removed. The Personnel Area values will no longer be saved and the Personnel Area variable selection will appear on all variable screens that use the Personnel Area variable.
Adding a Variant

The example below uses the Employees with Projected 5+ Service Years report to show how to add a variable Variant (Variants are report specific):

1. Enter the Variable(s) you would like to run your report with.
2. Click the “Save As...” button.
3. Enter a name for your Variant and click OK.
4. To access your saved Variant, click the dropdown arrow and select from the list.

Result: Your variable screen is displayed with your saved Variant (you can delete your saved Variant by accessing it and selecting the Delete button.)
Running a Report

To run a BW/BI Custom Report:

1. Enter variables.
   - **Note:** To ensure variables are valid, click the “Check” button prior to running the report.

2. Click the “OK” button to run the report.

Result: Report results with selected variables.
Defining BW/BI Custom Report Variables

All BW/BI Custom Reports require variable entry (selection criteria) prior to running the reports.

The following section provides the basic steps to enter variables for BW/BI Custom Reports.
Defining Variables: Position-Personnel Master Listing Report

To define the Position-Personnel Master Listing variables:

1. Enter any variables you may to run your report.

2. Enter a Calendar Month/Year in MM/YYYY format or select a date using the matchcode button for Month/Year. *This is a required field.

3. Enter an Organizational Unit hierarchy or select a hierarchy using the matchcode button. By selecting the Department of Enterprise Services hierarchy, the user is also selecting all organizational units that are a part of the Department of Enterprise Services hierarchy.
4. Click the OK button.

Result: The Position-Personnel Master Listing report results are displayed.

Additional Information (reports that have a sub-report, the context menu will display a “Goto” option):

To view a list of employees in a filled Position from the report results:

1. Right click on a Position in the report results to pull up the Context Menu.
2. Select Goto - Employees in Position.

Result: Employees in the selected Position are displayed.
Defining Variables: Position Statistics Report

Position Statistics Report
To define the Position Statistics Report variables:

1. Enter any variables you want to run your report.

2. Enter a Calendar Month/Year in MM/YYYY format or select a date using the matchcode button for Month/Year. *This is a required field.

3. Enter an Organizational Unit hierarchy or select a hierarchy using the matchcode button. By selecting the Department of Enterprise Services hierarchy, the user is also selecting all organizational units that are a part of the Department of Enterprise Services hierarchy.
Defining Variables: Position Statistics Report

3. Click the OK button.

Result: The Position Statistics report results are displayed.

Additional Information:

To view the Position Fill Counts:

1. Click on a line item in the report results to pull up the Context Menu.


Result: Position Fill counts are displayed.
Defining Variables: Position Roster Report

To define the Position Roster Report variables:

1. Enter any variables you want to run your report.
2. Enter a Calendar Month/Year in MM/YYYY format or select a date using the matchcode button for Month/Year. *This is a required field.*
3. Enter an Organizational Unit hierarchy or select a hierarchy using the matchcode button. By selecting the Department Enterprise Services hierarchy, the user is also selecting all organizational units that are a part of the Department of Enterprise Services hierarchy.
3. Click the OK button.

Result: The Position Roster report results are displayed.
Defining Variables: Class Distribution – Pay Class Report

Class Distribution-Pay Class Report

To define the Class Distribution - Pay Class report variables:

1. Enter a Calendar Month/Year in MM/YYYY format or select a date using the matchcode button for Month/Year. *This is a required field.

2. Enter the Employment Status (defaults to 3 - Active) or select an Employment Status using the matchcode button if you want something other than Active. *This is a required field.

3. Enter a Personnel Area number or select a Personnel Area number using the matchcode button.

4. Click the OK button.

Result: The Class Distribution - Pay Class report results are displayed.
Defining Variables: Classification Turnover

Classification Turnover Report
To define the Classification Turnover report variables:

1. Enter your variable selections or select a variable using the matchcode button.
2. Click the OK button.

Result: The Class Turnover report results are displayed.
Defining Variables: Employee and Position Status

Employee and Position Status Report

To define the Employee and Position Status report variables:

1. Enter a Calendar Month/Year in MM/YYYY format or select a date using the matchcode button for Month/Year. *This is a required field.*

2. Enter your other variable selections or select a variable using the matchcode button.

3. Click the OK button.

Result: The Employee and Position Status report results are displayed.
Defining Variables: Employee History Report

To define the Employee History Report variables:

1. Enter your variable selections or select a variable using the matchcode button.

2. Click the OK button.

Result: The Employee History report results are displayed.

Additional Information:

To view an Employee History Part 2 or an Employee’s education records:

1. Click on a line item in the Employee History Report results to pull up the Context Menu.

2. Select Goto - Employee History Part 2 or Employee Education Records.

Result: Employee sub report is displayed.
Defining Variables: Employee Summary Report

To define the Employee Summary report variables:

1. Enter a Calendar Month/Year in MM/YYYY format or select a date using the matchcode button for Month/Year. *This is a required field.

2. Enter the Employment Status (defaults to 3 - Active) or select an Employment Status using the matchcode button if you want something other than Active. *This is a required field.

3. Click the OK button.

Result: The Employee Summary report results are displayed.
Defining Variables: Employees with Projected 5+ Service Years

Employees with Projected 5+ Service Years

To define the Employees with Projected 5+ Service Years report variables:

1. Enter a Calendar Month/Year in MM/YYYY format or select a date using the matchcode button for Month/Year. *This is a required field.

2. Enter the Employment Status (defaults to 3 - Active) or select an Employment Status using the matchcode button if you want something other than Active. *This is a required field.

3. Click the OK button.

Result: The Employees with Projected 5+ Service Years report results are displayed.
Defining Variables: Flexible Employee Report

Flexible Employee Report
To define the Flexible Employee Report variables:

1. Enter the report variables to run report with, either direct input or using the match code.
2. Click the OK button.

Result: The Flexible Employee Report results are displayed.
Defining Variables: Hiring Freeze Tracking

Hiring Freeze Tracking Report
To define the Hiring Freeze Tracking report variables:

1. Enter a Calendar Month/Year in MM/YYYY format or select a date using the matchcode button for Month/Year. *This is a required field.

2. Enter other variables to run report with.

3. Click the OK button.

Result: The Hiring Freeze Tracking report results are displayed.
Defining Variables: Supervisor to Employee

Supervisor to Employee Report

To define the Supervisor to Employee report variables:

1. Enter a single Month/Year reporting value in MM/YYYY format or select a date using the matchcode button for Calendar Month Prompt. *This is a required field.

2. Enter your other variables you want to run the report with.

3. Click the OK button.

Result: The Supervisor to Employee report results are displayed.
Defining Variables: Employee File Statistics Report

Employee File Statistics Report

The Employee File Statistics report contains 19 queries. Sixteen of the queries can be run as one report or separately. To run all 16 queries as one report, click on the Employee File Statistics - All Reports link.

To define the Employee File Statistics report variables:

1. Enter a Calendar Month/Year in MM/YYYY format or select a date using the matchcode button for Month/Year. *This is a required field.

2. Enter the Employment Status (defaults to 3 - Active) or select an Employment Status using the matchcode button if you want something other than Active. *This is a required field.

3. Click the OK button.

Result: The Employee File Statistics - All Reports results are displayed.
Defining Variables: Employee File Statistics Report

The Employee File Statistics-Certificate and Employee File Statistics-Education queries are not included in the Employee File Statistics (Full Report) and must be run separately.

To run the query, the user must enter a “Valid On Date” in MM/DD/YYYY format to run, rather than Month/Year required in other Employee File Statistics queries:

To define the Employee File Statistics-Education and Employee File Statistics-Certification report variables:

1. Enter a Personnel Area number or select a Personnel Area number using the matchcode button.
2. Enter the Employment Status (defaults to 3 - Active) or select an Employment Status using the matchcode button if you want something other than Active. **This is a required field.**
3. Enter a Valid from Date in MM/DD/YYYY format or select a date using the matchcode button.
4. Enter a Valid to Date in MM/DD/YYYY format or select a date using the matchcode button.
5. Click the OK button.

Result: The Employee File Statistics-Education or Employee File Statistics-Certificate/Education results are displayed.
Defining Variables: Appointment Status Changes Report

Appointment Status Changes Report

To define the Appointment Status Changes report variables:

1. Enter a single Month/Year reporting value in MM/ YYYY format or select a date using the matchcode button for Calendar Month Prompt. *This is a required field.
2. Enter your other variables you want to run the report with.
3. Click the OK button.

Result: Appointment Status Changes results are displayed.
Defining Variables: Appointment Status Changes Report

Additional Information:
To view the Appointment Status Changes for the prior month:

1. Click on a line item in the Appointment Status Changes report to pull up the Context Menu.

2. Select Goto - Appointment Status Changes - Prior Month Status.

Result: Appointment Status Changes for the Prior Month are displayed
Defining Variables: Affirmative Action Report

Affirmative Action Report

The Affirmative Action category is made up of 3 queries that must be run separately.

To define the Affirmative Action report variables:

1. Enter a single Month/Year reporting value in MM/YYYY format or select a date using the matchcode button for Calendar Month Prompt. *This is a required field.

2. Enter your other variables you want to run the report with.

3. Click the OK button.

Result: The Affirmative Action selected report results are displayed.
Defining Variables: Manager to Staff

PLAN & ALIGN WORKFORCE - Percent of Washington Management Service (WMS) employees and percent of the workforce that is managers compared to the total workforce.

To define the HRM Manager to Staff report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Manager to Staff report is displayed.
Defining Variables: Washington Management Service

PLAN & ALIGN WORKFORCE - Number of Washington Management Service (WMS) employees by month/year.

To define the HRM Washington Management Service report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Washington Management Service report is displayed.
Defining Variables: WMS Management Type

PLAN & ALIGN WORKFORCE - Number of Washington Management Service (WMS) employees by management type. Define the HRM WMS Management Type report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM WMS Management Type report is displayed.
Defining Variables: Separation During Review Period

HIRE WORKFORCE - Number of separations from state service during Probationary, Trial Service, Transitional and WMS Review periods.

To define the HRM Separation During Review Period report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Separation During Review Period report is displayed.
Defining Variables: Type of Appointments

HIRE WORKFORCE - Number of Permanent or intended to become permanent New Hire/Rehires, Promotions, Transfers, Hires from Layoff List and Other appointments.

The intent of this report is to show appointment activities where a hiring choice was made. Appointment changes such as reassignments, reallocations, demotions, or status changes are not included. To define the HRM Type of Appointments report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Type of Appointments report is displayed.
Defining Variables: Average Overtime

DEPLOY WORKFORCE - Average agency and Executive Branch overtime hours used. Includes averages for only those eligible for overtime and averages for all employees, regardless of overtime eligibility.

To define the HRM Average Overtime report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Average Overtime report is displayed.
Defining Variables: Overtime Cost

DEPLOY WORKFORCE - Amount of agency and Executive Branch Overtime costs.

To define the HRM Overtime Cost report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Overtime Cost report is displayed.
Defining Variables: Percent Employees Receiving Overtime

DEPLOY WORKFORCE - Percent of agency and Executive Branch employees receiving overtime. Includes percentages for only those eligible for overtime and percentages for all employees, regardless of overtime eligibility.

To define the HRM Percent Employees Receiving Overtime report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Percent Employees Receiving Overtime report is displayed.
Defining Variables: Sick Leave

DEPLOY WORKFORCE - Average sick leave hours used and average sick leave balance by agency and Executive Branch.

To define the HRM Sick Leave report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Sick Leave report is displayed.
Defining Variables: Formal Disciplinary Action Taken

REINFORCE PERFORMANCE - Number of disciplinary actions by Dismissals, Demotions, Reductions in Pay, and Suspensions.

To define the HRM Formal Disciplinary Action Taken report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Formal Disciplinary Action Taken report is displayed.
ULTIMATE OUTCOMES - Number and percent of the workforce by diversity category and ethnicity.

To define the HRM Diversity Profile report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Diversity Profile report is displayed.
Defining Variables: Percent Age Distribution

ULTIMATE OUTCOMES - Percent of all employees and WMS employees by age groups.

To define the HRM Percent Age Distribution Report variables:

1. Enter your variable selections.

2. Click the OK button.

Result: HRM Percent Age Distribution report is displayed.
Defining Variables: Turnover

ULTIMATE OUTCOMES - Percent of permanent or intended to become permanent employees who separated from state service by type (Retirement, Resignation, Dismissal, Layoff, and Other).

Note: Optional fields for number of Seasonal and Non-Permanent separations are available. Seasonal and Non-Permanent separations are not included in the overall Turnover counts or percentages. Seasonal turnover includes all permanent, or intended to become permanent.

To define the HRM Turnover report variables:

1. Enter your variable selections.
2. Click the OK button.

Result: HRM Turnover report is displayed.