Business Intelligence

Reporting

Business Intelligence 4.3 Guide

HRM Payroll 12.01.2023

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Business Intelligence Steps 4.3

1. Sign in to myapps with multifactor authentication

Sign in to your account

Email Address: [_____]

Password: [_____]

[Sign In] [Create Account]

2. Click on the Business Intelligence App

Business Intelligence

Reporting

Note: Pop-up blockers may prevent users from accessing portion of this site you may disable in accordance to your department policy.

4.3 Business Intelligence (BI) Launch Pad

4.3 Business Intelligence (BI) home screen is called the Launch Pad.

The Launch Pad consists of five sections: Home, Favorites, Recent Documents, Recently Run, and Applications sections. Clicking on the desired section tab will navigate to that tab.

The Home Group

The Home group section tiles are: Folders, Categories, Documents, BI Inbox, Instances, and Recycle Bin. The home group section is one of the sections where users may navigate throughout the Business Intelligence application.
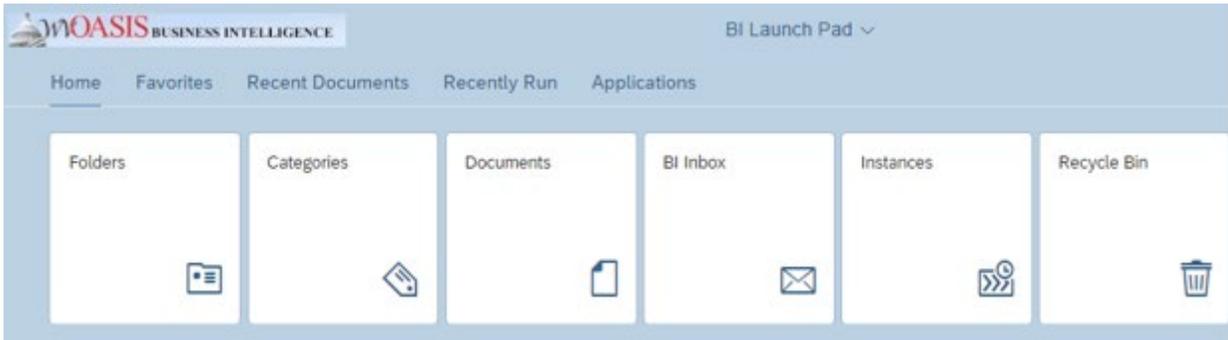
Home Group tiles:

Folders tile: Contains the reports the user has access to. This tile is equal to the folders section found in 3.11 BI as seen below located in the documents tab. The screenshots below show the similarities in the folder section.

3.11 Business Intelligence

4.3 Business Intelligence

Clicking the Folders tile will navigate to the folders section where the desired report is located. 4.3 BI navigation is similar to 3.11 BI, click the folder until the report is located and click on the report to open.

Users have two ways to navigate the folders section similar to 3.11 BI.

A. The navigation tree in 3.11 BI is still available in BI 4.3.
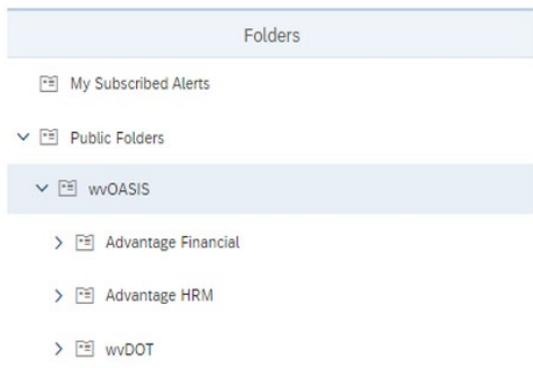
4.3 Business Intelligence   3.11 Business Intelligence
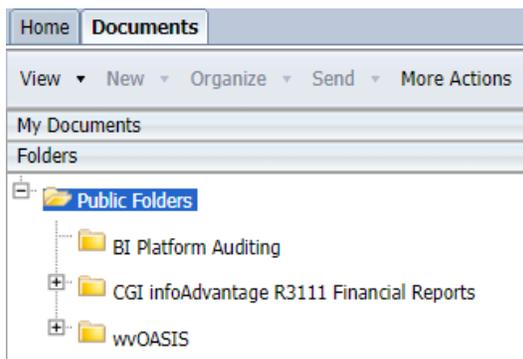
B. Users can also navigate through the selected folder area like 3.11 BI.

4.3 BI Selected Folder Area

3.11 BI

A new feature in the selected folders area is the report path is visible at the top of the Selected folder area as the folders are selected. The path can also be used to navigate to selected folders.

Users can change the view of the folders in the selected folder area by selecting the Tile View Icon or the List View Icon located in the top right of the Selected folder area.

List View:

The List view icon:

Tile View:

The Tile View Icon:
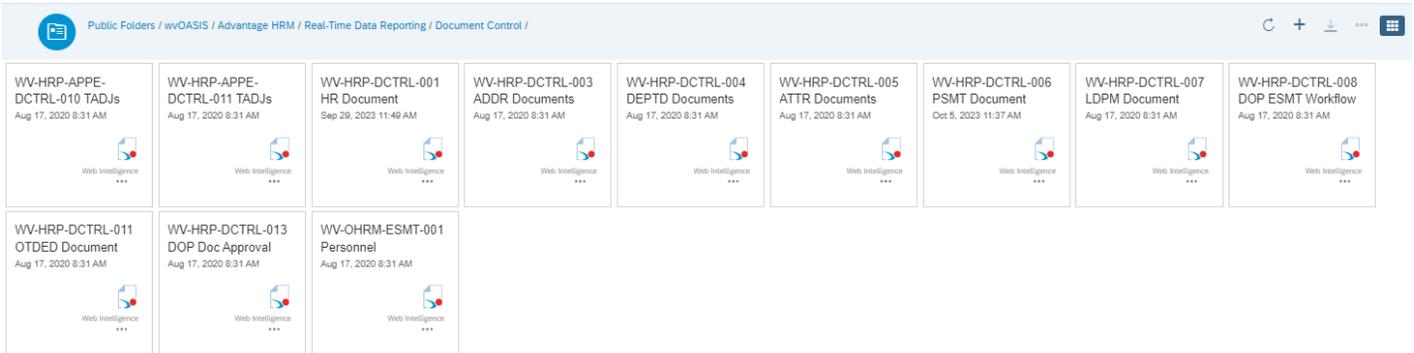
Categories Tile: This tile will not be used by the State of West Virginia.

Documents Tile: The Documents tile in the Home page shows all the content objects (reports) present in the BI Launch Pad. Users can select reports from the list of reports.

BI Inbox Tile: The BI Inbox is where users will find published reports. Users can select the report publication on the left side of the BI Inbox and click on the View button to open. The unread publications will show as bold and the read publications will be in regular font.
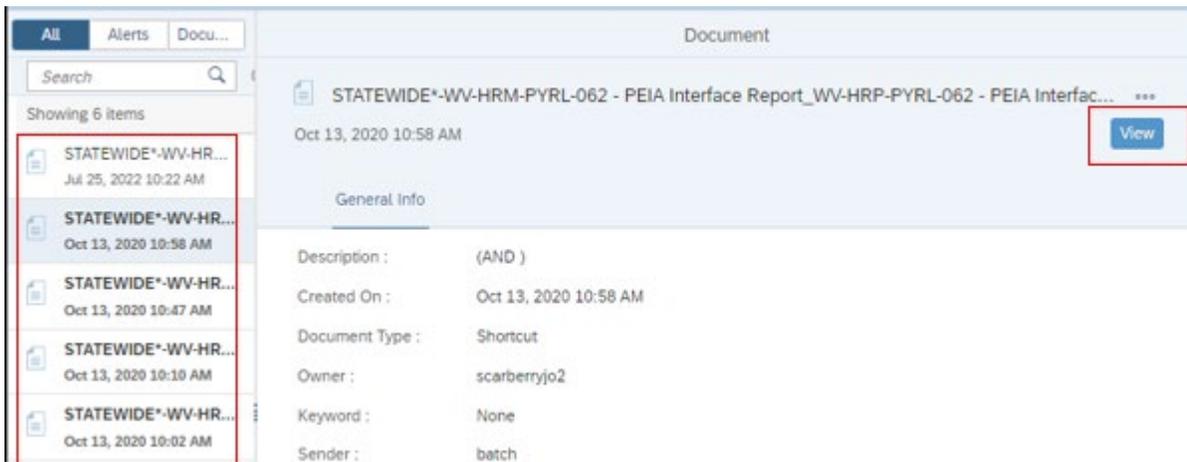
Instances Tile: This tile will not be used by the State of West Virginia

Recycle Bin: This tile will not be used by the State of West Virginia

Report Features

1. Refresh –

The Refresh button must be clicked to run the report. If the report has prompts the Prompts window will appear allowing users to complete any mandatory or desired prompts.

Mandatory Prompts – Will show an icon and must be completed before the report can be executed.
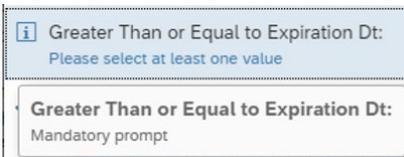
A. To complete a prompt select the desired prompt in the prompt pane on the left side.
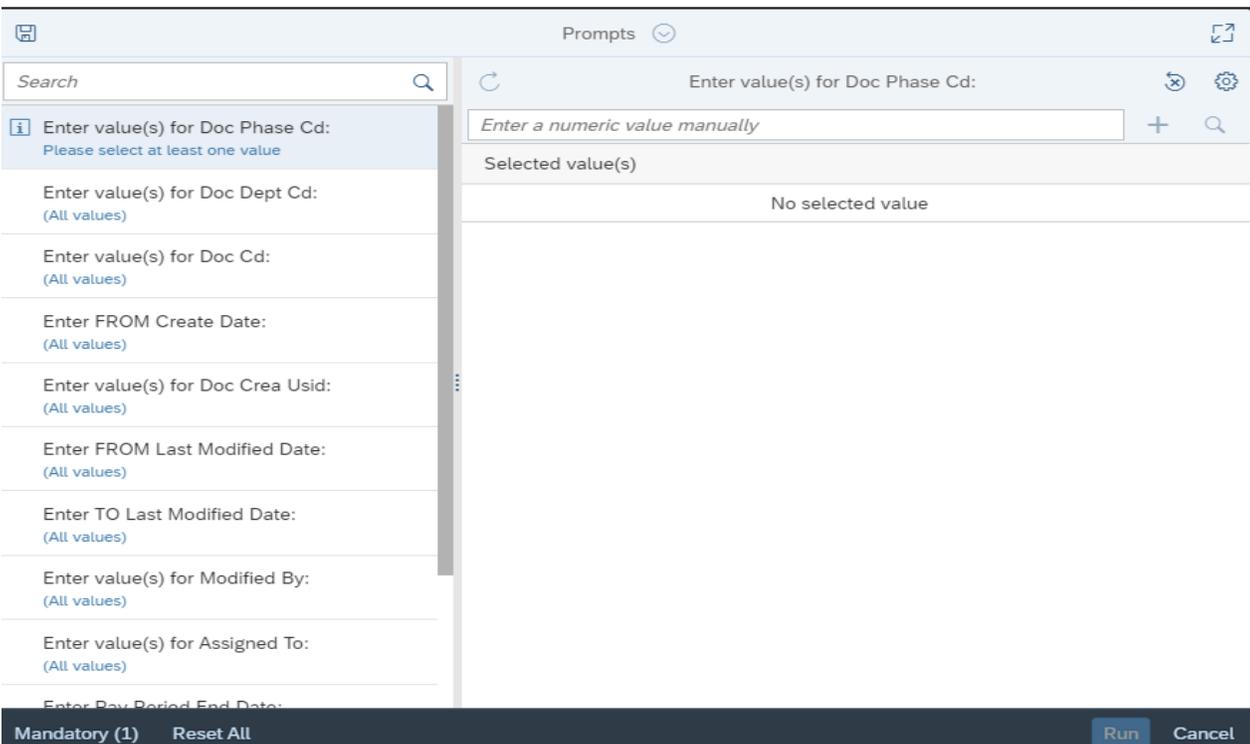
B. Once selected enter the value desired in the value field.
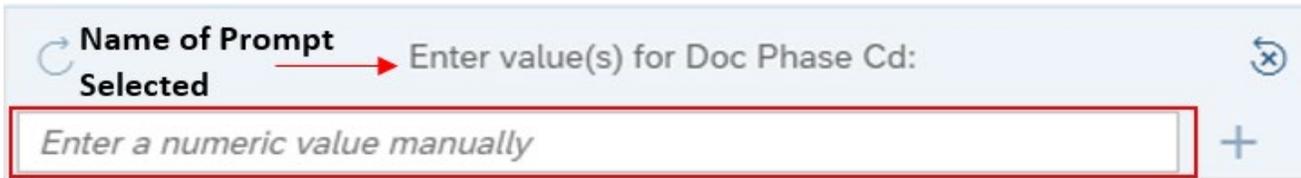
The value field provides value required for the prompt:

Numeric Value: requires a numeric value to be used

All Values: requires any value which includes alpha or numeric

Enter a date manually: If it requires a date it will say enter a date manually. To select a date you can enter the date using this format XX/XX/XXXX or you can select the date by clicking the calendar icon seen below.

To clear a prompt that has been prefilled, select the prompt in the left hand pane and click the reset prompt values with default values icon

To view all available prompt values for selected prompts click the reload the list of value icon. This will load any applicable values available for the prompt. Note: Not all prompts can be refreshed for values.
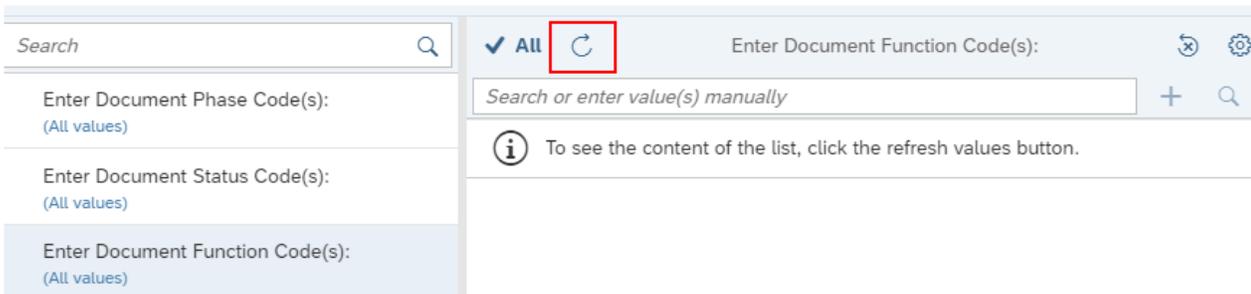
Note: To select multiple values for a prompt click the value field and add the next value after the first value has been added. This process can be repeated until all desired prompt value are selected

C. You must either click the manual entry + in the drop down or the plus icon to the right of the prompt value field.
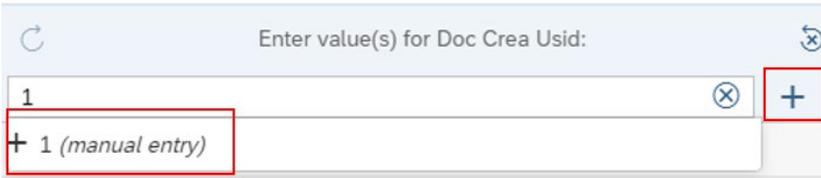
D. Once selected the prompt value will be visible in the selected value section. To remove any selected value click the X icon beside the selected value.
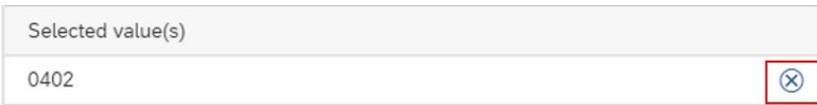
E. Click Run to execute the report
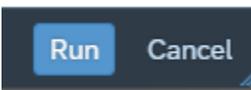
2. Export

The Export button allows users to export reports to PDF or Excel.

A. By clicking the Export button the Exports prompt will appear.

In the left hand pane users will select which export file type. Once the file type has been selected users will select which tabs of the report to export. Clicking all reports will export all tabs from the current report. Otherwise only the tabs selected will export.
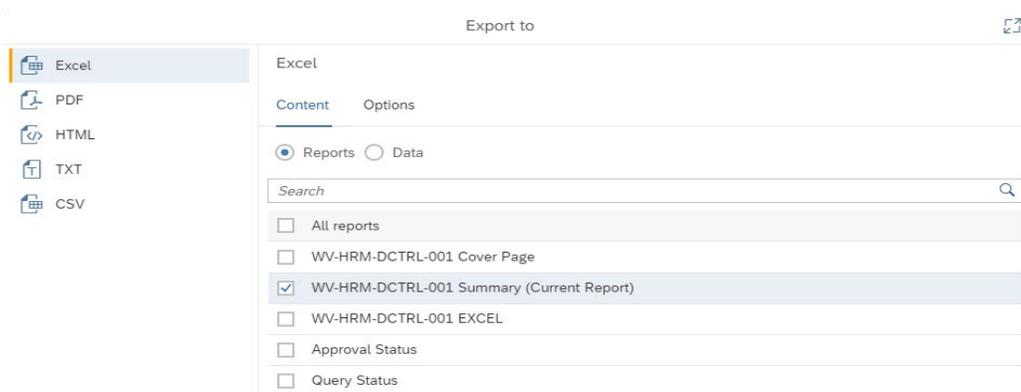
B. Click the export button to complete exporting the report
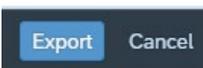
3. **Report Tabs** –
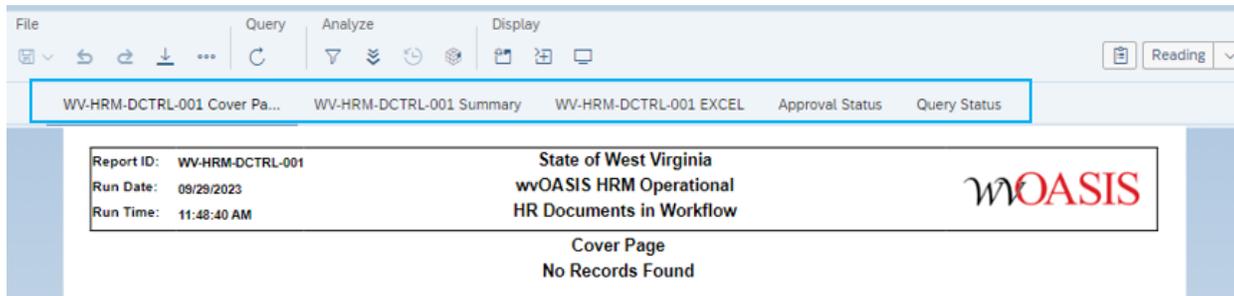
The report tabs are located at the **top** of the report compared to the bottom in 3.11 BI. Click on the tab to select, if the tab has multiple pages users can use the navigation bar at the bottom of the screen which appears once the user's mouse is moved to the bottom middle of the screen. In the navigation bar users can navigate to the next page.

4. Interactive Mode Drop-down

BI 4.3 also has interactive mode similar to BI 3.11. In a report to activate interactive mode click the dropdown and change from Reading to Design. Once design is activated users can click within the data to sort, filter, and remove information within the report. If the report times out all updates made in interactive mode will be lost.
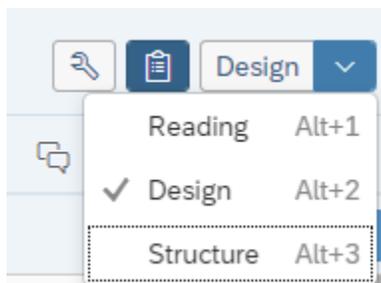
5. Open Reports
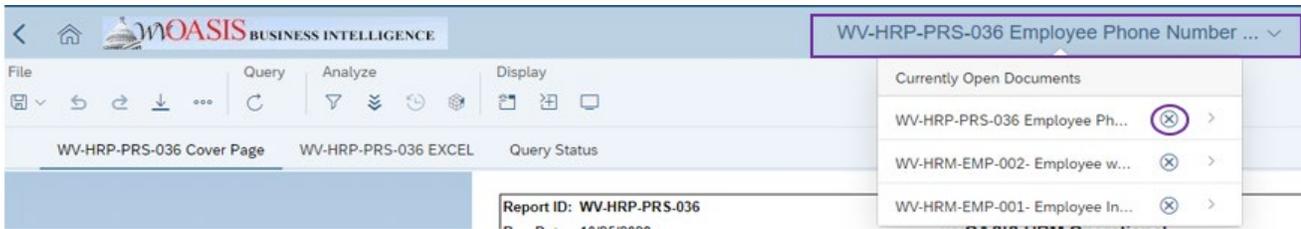
Users can have multiple reports open at one time. In 3.11 there were report tabs located across the top, in 4.3 BI if a user has multiple reports open you can click on the report name located in the header section of the report and click the desired report to open. You can close any open reports by clicking the X icon by the selected report.

Open reports can be selected from the BI Launch Pad by clicking the BI Launch Pad dropdown located in the top of the Launch Pad.
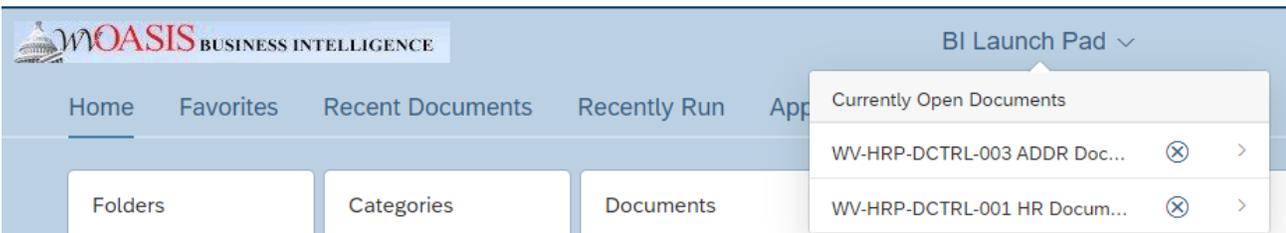
Favorites

Favorites Section – Users favorites in BI 3.11 <u>will not</u> transfer to 4.3 BI. Users will have to add all favorites.

The Favorites section on the BI Launch Pad will be blank until favorite reports are added.

To add Favorites:

Find report in the folders section and right click on the report. Click the Mark as Favorite in the pop up menu.
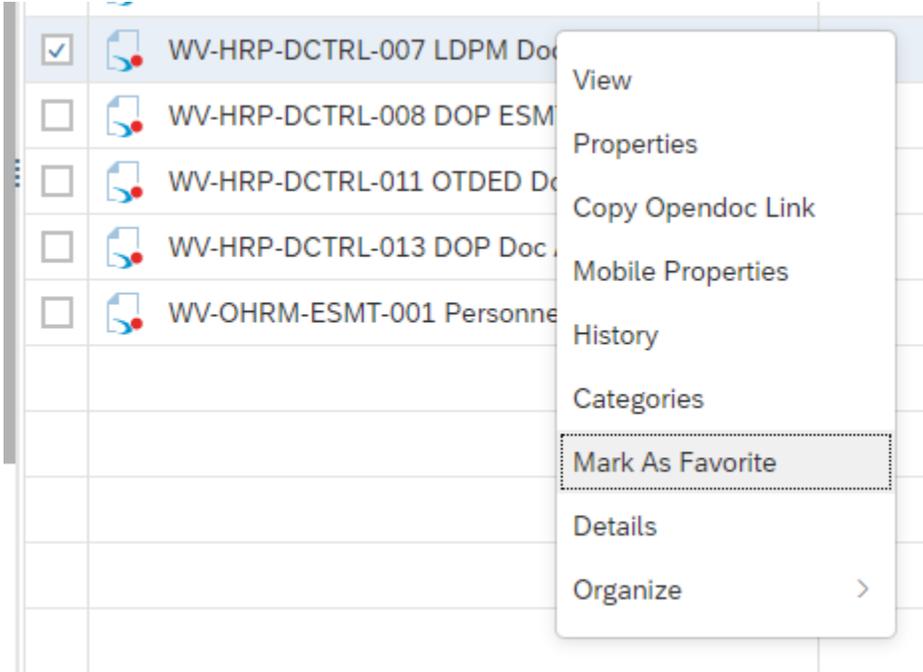
To Remove Favorites:

Click on the 3 dots on the report desired to be removed. A popup menu will display and click the Remove From Favorite.

Report Name	Purpose	BI Main Folder	BI Sub-Folder	Prompts	Report Description
WV-HRP-DCTRL-001 HR Document Workflow	Review documents in draft (1), pending (2) and final (3) phases. This will identfy where the document is in	Real-Time Data Reporting	Document Control	Doc Dept Code(s) Doc Create UserID(s) Doc Code(s) Doc Phase Code(s) FROM Date TO Date	This report lists HR documents that are currently in Workflow. The First tab of the report shows a count of documents by Doc Code and Doc Phase. The second tab is an Excel Dump of all the documents that are in workflow by Doc Code and Doc Phase. The report has required prompts on Doc Dept Code and Doc Phase Code. The report has optional prompts on Doc Create User ID and Doc Code. The Document Phase Code prompt is defaulted to 1 for documents in Draft and 2 for documents in Pending. Value 3 is for Final documents. This value can be
WV-HRM-POS-001 - Position Information	All PSMT, PAMT information for your complete department.	Real-Time Data Reporting	Position Control	Fiscal Year As Of Date Home Department(s) Home Unit(s) Position Number(s) Assignment	This report provides the information associated to the positions as avaiable in the POSM activity folder in wvOASIS HRM. The report is separated into two tabs, Position Maintenance and Employee Roster. The Position Maintenance tab contains the position information from both PAMT and PSMT page in the application. The Employee Roster tab provides the employees associated to the position and their salary information as defined in the Pay Parameter page.
WV-HRM-EMP-001-Employee Information	The purpose of this report is to show employees information that is in HRM	Real-Time Data Reporting	Personnel Administration/Agency HR Reports	Home Department Code(s) Home Unit Code(s) Employee ID(s) Employment Status Code(s)	The Employee Information report provides the current employee data available in the wvOASIS HRM operational application. The report has seperate tabs: Employee Assignment, Pay Parameters, Blank Timekeeper ID and Blank Supervisor ID. The report has a required prompt on the Employee Home Department Code and optional prompts for the Home Dept(s), Home Unit(s) and/or Employee ID(s). The report can be exported to excel
WV-HRP-PC-005 - Change in Pay by Personnel Action		Historical Data Reporting	Position Control	Fund Class(s) Department(s) Unit(s) Title(s) Sub-Title(s) Position Number(s) Assignment Type	The Change in Pay by Personnel Action report provides detail information on the Pay Amount change for an employee by the change in Personnel Actions like Promotion, Demotion, Correction. The report will be grouped on Fund Class, Department, Unit and Title.
WV-HRP-DCTRL-006 - PSMT Document Listing		Real-Time Data Reporting	Document Control	Effective FROM Date Effective TO Date Document Department Code(s) Position Action Code(s)	This report gives the information from the PSMT documents.
WV-HRP-PC-010 - Vacant Positions by Fund Class and Department		Historical Data Reporting	Position Control	Fund Class(s) Funding Department(s) Fund(s) Position Number(s) Assignment Type	The Vacant Position by Fund Class and Department report lists the position information which are vacant on or before the user entered date. The position information is grouped by Fund Class and Department and additional information like Fund Code, Appropriation Code, Vacancy Date and the Classification information on the position. The report can be executed for Permanent and Temporary positions. For Permanent position the report will provide the Last Incumbent and the Salary associated to the vacant position. For temporary positions, the position salary denotes the budgeted salary for one
WV-HRP-PC-021 - Available Position Budget Negative Conditions		Historical Data Reporting	Position Control	Budget Fiscal Year Department(s) Fund(s) Appropriation(s) Object(s)	The Available Position Budget Negative Condition report provides the information in regards to permanent positions that are assigned to budgets. The report shows the accounting elements, budget amounts and salary amounts which results in a negative budget. The report shows Budget Fiscal Year, Fund, Funding Department, Appropriation, Financial Budget Object Code, Current Budget Amount, Budget Reserve Amount, Filled Position Salary Amount, Vacant Position Salary Amount and Available Budget. The Available Budget is calculated as (Current Budget Amount - Budget Reserve Amount) - (Filled Position Salary Amount + Vacant
WV-HRP-PC-024B Position Accounting Distribution addtl COAs		Historical Data Reporting	Position Control	Fiscal Year As Of Date Permanent Temp ID Fund Class Code(s) Cabinet Code(s) Department	This version of the Expenditure Schedule report (PC-024B) includes all the fund and detail accounting chart of account elements. This report reflects the DHHR spending account (i.e. Fund 5065) for a subset of positions for Dept 0511. In order to see the 'true funding' for those DHHR spending account positions, including all chart of account elements, see the PC-024C report. The PC-024C report is located in the same Advantage HRM BI folder. This report is intended to replace the Expenditure Schedule report that used to come from PIMS however it does goes down to a lower level since it includes all fund and detail chart of account
WV-HRP-PC-024 - Position Accounting Distribution Report w 0511 spending account	Report has been used for organizational charts, senior management report and other personnel reports.	Historical Data Reporting	Position Control	Posn Auth Fiscal Year Home Dept Code(s) Assignment Type(s)	This report lists Active Positions with their accounting information with various sorts over 3 tabs. The Master List tab is a data dump of Active Position information. The Expenditure Schedule lists Acitve Positions by Fund, Fiscal Year, Department, and Appropriation. The Org Unit List sorts Active Positions by Position Home Department and Position Home Unit. Totals are calculated for FTE, Base Salary, and Annual Increment. Appointment ID of 'blank' indicates Primary Appointment.
WV-HRP-PC-036 - Position Salary Less than Title Minimum		Historical Data Reporting	Position Control	Posn Auth Fiscal Year Position Home Dept Code(s) Position Home Unit Code(s)	This report shows the difference between the Annual Position Salary and the Title Code Minimum Salary. The report has two tabs, one for filled positions and one for vacant positions.

Report Name	Purpose	BI Main Folder	BI Sub-Folder	Prompts	Report Description
WV-HRP-PYRL-037 - Labor Distribution Profile by Department and Position		Historical Data Reporting	Position Control	Home Department(s), Appropriation(s) Position(s), Major Program(s) Position Assignment Type, Program(s)	The Labor Distribution Profiles by Department and Position report provides the list of all active and current LDPRs associated with a position. The report lists the accounting strings associated with each line of the LDPR and the distribution percentage for each line. The report also provides the employee information such as Employee Name, Employee ID and Appointment ID. The report shows "Vacant" string in place of employee information whenever the position is vacant. The report is grouped by Home Department, Home Unit, Position Number and Employee.

Report Name	Purpose	BI Main Folder	BI Sub-Folder	Prompts	Report Description
WV-HRP-PRS-039 - Position and Employee Assignment Comparison		Real-Time Data Reporting	Personnel Administration	Home Department(s) Home Unit(s) Position Number(s)	The Position and Employee Assignment Comparison report shows employees and positions where there is a mismatch between the position information and employee information. The fields that the report checks for mismatches between Time Class, Pay Class, Civil Service Status, Assignment Type, Title, Sub-Title, Work Location, Pay Policy, Deduction Policy, Leave Policy, FLSA ID, FLSA Profile, Grade, CCOMP ID, and CCOMP Profile

Report Name	Purpose	BI Main Folder	BI Sub-Folder	Prompts	Report Description
WV-HRP-PYRL-036 - Salary greater than User Entered Amount	Reviews employees who make over $100,000.	Historical Data Reporting	Payroll Management /Payroll Employee Reports/APPE Payroll	Gross to Net Run Number Home Department(s)	This report provides the information of the amounts paid with respect to the various Pay Types. The report fetches the data after the Preliminary payroll run. The report shows the information such as Home Department Code, Employee ID, Name, Pay Type, Hours and Pay Amount. Report shows salary information for the employee when the Gross Pay amount is greater than the user entered amount. The report prompts for Home Department Code (Optional), Salary Amount (Required) and GTN Run Number (Required) for which data should be displayed.
WV-HRP-PYRL-058 - Pay Amount Comparison to Position Salary by Pay Event Type	Production (Mon-Tue) The prelim version is 106	Real-Time Data Reporting	Payroll Management /Central Agency Reports/Current Payroll - Production	Gross To Net Number Pay Period End Date Home Department Code(s) Home Unit Code(s)	The Pay Amount Comparison to Position Salary by Pay Event Type report mainly depicts the information against the current payroll data. The report displays the Pay events and the corresponding Pay Amount for the current pay period. It further depicts the employee salary defined for that particular pay period for the pay events & displays the difference calculated between amount defined and amount actually paid for each pay event. The report is grouped by the Home Department code and the Home Unit Code
WV-HRP-PYRL-106 - Pay Amount Comparison to Position Salary by Pay Event Type	prelim (Wed-Fri) the production version is 58	Historical Data Reporting	Payroll Management /Payroll Employee Reports/APPE Payroll	Gross To Net Number Pay Period End Date Home Department Code(s) Home Unit Code(s)	The Pay Amount Comparison to Position Salary by Pay Event Type report mainly depicts the information against the current payroll data. The report displays the Pay events and the corresponding Pay Amount for the current pay period. It further depicts the employee salary defined for that particular pay period for the pay events & displays the difference calculated between amount defined and amount actually paid for each pay event. The report is grouped by the Home Department code and the Home Unit Code & prompts the user to enter the Gross To Net Number(Required), Pay Period End Date(Required), Department code (optional),Unit Code (optional) and Pay Event Type Code (optional) for which the report needs to be
WV-HRP-PYRL-109-Preliminary Payroll Register - Detail	All employees pay and deductions. This should be used daily during production payroll weeks.	Historical Data Reporting	Payroll Management /Payroll Employee Reports/APPE Payroll	Home Department(s) Home Unit(s) Pay Location(s)	The Preliminary Payroll Register Detail report gives a detailed account of the deduction information; mainly the deduction category, type, plan and the associated deduction amount. In addition, the report also depicts the pay amount and hours associated to a pay type. The report displays the information at the Employee, Pay location, Home Unit and at the Home Department level. The report prompts the user for the Department code (optional), Unit code (optional), Pay location (optional) and the Gross To Net Run Number for which the report needs to be viewed.
WV-HRP-PYRL-193-APPE Payroll Zero Dollar Check Register Report		Historical Data Reporting	Payroll Management /Payroll Employee Reports/APPE Payroll	Home Department(s) Home Unit(s) Pay Location(s) Check Date Employee ID Gross to Net Run Number	The Payroll Zero Dollar Check Register report gives a detailed account of the deduction information for employees who have a check amount less than or equal to zero; mainly the deduction category, type, plan and the associated deduction amount. In addition, the report also depicts the pay amount and hours associated to a pay type. The report displays the information at the Employee, Pay location, Home Unit and at the Home Department level. The report prompts the user for the Department code (optional), Unit code (optional), Pay location (optional) and the date range for which the report needs to be viewed.
WV-HRP-PYRL-213 Employee Pending Payments	To review pending payment for employees.	Real-Time Data Reporting	Payroll Management	Home Dept Code(s) Event Start Date Event End Date Event Type Code(s)	The Employee Pending Payments report shows the information from the Pending Payments section of the PAYM page in the Advantage HR Application. The report has optional prompts on Home Department, Event Date Range, Event Type Code, and On Hold Flag. For the On Hold flag prompt, 1 will show On Hold payments and 0 will show payments that are not

Report Name	BI Main Folder	BI Sub-Folder Location	Prompts	Report Description
WV–HRP–PYRL–214 Employee Pending Deductions	Real-Time Data Reporting	Payroll Management	Home Department Code(s) Home Unit Code(s) Employee ID(s) Deduction Type Code(s)	The Employee Pending Deduction report display information from the Pending Deduction section of the DEDM page in the HR Application. The report is sorted by Home Dept, Home Unit, and Employee. The report has optional prompts on Home Dept, Home Unit, Employee ID, and Deduction Type code.

Report Name	BI Main Folder	BI Sub-Folder Location	Prompts	Report Description
WV–HRP–PYRL–217 Employee Deduction Parameters	Real-Time Data Reporting	Payroll Management	As Of Date Home Dept Code(s) Home Unit Code(s) Deduction Type(s) Deduction Plan(s)	The Employee Deduction Parameters report shows the current Deduction set up for each employee. The report has a required prompt on As Of Date. The report has optional prompts on Home Department, Home Unit, Deduction Types, and Deduction Plans.

Report Name	BI Main Folder	BI Sub-Folder Location	Prompts	Report Description
WV-HRP-BA-007 Non-Active Employees Enrolled in Benefits	Real-Time Data Reporting	Benefits Administration	Home Dept Code(s) Home Unit Code(s)	The Non-Active Employees Enrolled in Benefits report shows Employees that are in a Non-Active Employment Status and are Enrolled in PEIA. The report pulls this information from the Deduction Parameter table, looking for Employees that have a Deduction Type of PEIAA or PEIAP. This can be checked by going to the DEDM activity folder in the HRM Application and selecting the Deduction Parameter link. The report shows the Employee's Home Department, Home Unit, Employee ID, Employee Name, Employment Status Code, and Effective Date. The report has optional prompts on Home Department and Home Unit.

Report Name	BI Main Folder	BI Sub-Folder Location	Prompts	Report Description
WV-HRP-BA-008 Temporary Employees Enrolled in Benefits	Real-Time Data Reporting	Benefits Administration	Home Dept Code(s) Home Unit Code(s)	The Temporary Employees Enrolled in Benefits report shows Employees that are in a Temporary Employment Status and are Enrolled in PEIA. The report pulls this information from the Deduction Parameter table, looking for Employees that have a Deduction Type of PEIAA or PEIAP. This can be checked by going to the DEDM activity folder in the HRM Application and selecting the Deduction Parameter link. The report shows the Employee's Home Department, Home Unit, Employee ID, Employee Name, Employment Status Code, and Effective Date. The report has optional prompts on Home Department and Home Unit

Report Name	BI Main Folder	BI Sub-Folder Location	Prompts	Report Description
WV-HRP-BA-010 Active Employees with No Retirement Plan	Real-Time Data Reporting	Benefits Administration	Enter Dept Cd: Enter Home Unit Code: Greater Than or Equal to Expiration Dt: Enter value for Dedplan Code (default values set):	This report will list current active permanent employees that are NOT enrolled in a retirement plan. The report pulls this information by getting a list of current active permanent employees and removing employees that are currently enrolled in any of the following deduction plans: PERS, PERS2, TCREF, GWPEN, JDGR2, JDGRT, PLANA, PLANB, RREE, RRT2, TDCON, TRST3, TRST9, 302TR. The Deduction Plan Codes prompt values can be changed if needed. This can be checked by going to the BA page in the HRM application. The report shows the employee's home department, home unit, employee ID, employee name, employement status code, and effective date. The report has optional prompts on home department and home unit.

Please see the OASIS HRM Report Inventory Excel spreadsheet located in the Advantage HRM folder in Business Intelligence for all report paths and descriptions.

OASIS HRM Report Inventory - Updated 10.12.2023

Legend
Employee/ Document/ Position
Payroll
Benefits
ACA Reports

Business Intelligence 4.3 Report Paths:
Real-Time Data Reporting Folder

Benefits Adminstration Folder

WV-HRP-BA-007 Non-Active Employees Enrolled in Benefits

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Benefits Administration

WV-HRP-BA-008 Temporary Employees Enrolled in Benefits

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Benefits Administration

WV-HRP-BA-009 Active Employees with No PEIA Benefits

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Benefits Administration

WV-HRP-BA-010 Active Employees with No Retirement Plan

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Benefits Administration

Document Control Folder

WV-HRP-DCTRL-001 HR Document Workflow

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Document Control

WV-HRP-DCTRL-006 - PSMT Document Listing

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Document Control

Payroll Management Folder

WV-HRP-PYRL-213 Employee Pending Payments

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Payroll Management

WV-HRP-PYRL-214 Employee Pending Deductions

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Payroll Management

Personnel Administration Folder

WV-HRP-PRS-039 - Position and Employee Assignment Comparison

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Personnel Administration

WV-HRM-EMP-001 Employee Information

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Personnel Administration → Agency HR Reports

WV-HRM-EMP-003 Employee Information As of Entered Date

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Personnel Administration → Agency HR Reports

Position Control Folder

WV-HRP-POS-001 Position Information

Public folders → wvOASIS → Advantage HRM → Real Time Data Reporting → Position Control

Historical Data Reporting Folder

Payroll Management Folder

WV-HRP-PYRL-036- Salary great than User Entered Amount

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Payroll Management → Payroll Employee Reports → APPE Payroll

WV-HRP-PYRL-106-Pay Amount Comparison to Position Salary by pay Event type

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Payroll Management → Payroll Employee Reports → APPE Payroll

WV-HRP-PYRL-109- Preliminary Payroll Register – detail

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Payroll Management → Payroll Employee Reports → APPE Payroll

WV-HRP-PYRL-193 APPE Payroll Zero Dollar Check Register

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Payroll Management → Payroll Employee Reports → APPE Payroll

WV-HRP-PYRL-195 Payroll Zero Dollar Check Register Report (Production)

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Payroll Management → Payroll Employee Reports →   Payroll – In Progress

Position Control Folder

WV-HRP-PC-021 - Available Position Budget Negative Conditions

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Position Control

WV-HRP-PC-024 - Position Accounting Distribution Report w 0511 spending account

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Position Control
WV-HRP-PC-024B Position Accounting Distribution addtl COAs

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Position Control

WV-HRP-PC-036 - Position Salary Less than Title Minimum

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Position Control

WV-HRP-PYRL-037 - Labor Distribution Profile by Department and Position

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Position Control

WV-HRP-PC-005 - Change in Pay by Personnel Action

Public folders → wvOASIS → Advantage HRM → Historical Data Reporting → Position Control

If you have any questions or want individual department training, please contact HRMPayroll@wvsao.gov