



Department of
**Finance &
Administration**

Strategic
Technology Solutions

Maximizing Edison

Introduction

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 - Time and Labor Module Lead

Learning Objectives

1. Gain an understanding of some of the reporting features in Edison, which includes:
 - a) Ad hoc reporting and analysis
 - b) Dashboards
 - c) Automated alerts
2. Learn about tools available to help you:
 - a) Analyze data to track trends
 - b) Recognize opportunities for business process improvement
3. Understand how to schedule queries and available delivery options

Understanding Business Intelligence (BI) & Leveraging BI Analytics

The logo consists of a red square with the letters 'TN' in white, serif font. Below the red square is a thin dark blue horizontal bar.

TN

®

Chad Rue

HCM Business Intelligence



HCM Business Intelligence



HCM Business Intelligence Agenda

- Query versus Analytics
 - Edison Query versus BI Analytics
 - Analytical Sample Questions
- Business Intelligence (BI)
 - What is Business Intelligence
 - Why Organizations Deploy BI Solutions
 - Objective of BI
- How Edison BI Works
 - BI Overview
 - Security
 - BI Navigation
 - Subject Areas
 - Self-service analytics
 - BI Answers
 - Dashboards
 - Automated alerts
 - Catalog

Queries versus Analytics

Queries

- Used for the day-to-day operations
- Request detailed transactional data from Edison
- Ensure transactional data is complete and accurate
- Focus on reviewing raw data

Analytics

- Used for planning, monitoring performance, and strategic decision making
- Discover meaningful patterns in data
- Focus on improving business process performance
- Understand historical trends and predict future outcomes

Analytical Questions

- How many employees are hired each month, quarter, or year?
- How many employees separated last month, quarter, or year?
- How are annual total gross wages trending in relation to employee headcount?
- What percentage of full-time, non-seasonal employees separate within one year of the last hire date?
- Are employees in a job series paid above or below midpoint?
- What is the total employee turnover trend for the last five years?

Year	Year	Job Code	Compa-ratio	Event Count
2016	2016	002361	97%	516
				548

Year	Employee Turnover Rate %
2010	14.67
2011	14.62
2012	15.52
2013	16.31
2014	17.47
2015	19.44

002654	95%
002655	96%
002656	101%
002657	100%

What is Business Intelligence?

-  **Business intelligence** (BI) is a technology-driven solution used to analyze data and present actionable information to help executive leadership, management and other end users make more informed business decisions that ultimately improve the performance of an organization
-  **BI** provides users with a set of tools that allow an organization to create ad hoc analyses and visual analytics, monitor key performance metrics, and receive automated alerts per a schedule or conditional event
-  Business intelligence leads to actionable insight, which is a course of action taken in response to the data

Why Organizations Deploy BI Solutions?

According to Dresner Advisory Services' flagship *Wisdom of Crowds Business Intelligence Market Study* the top five reasons why businesses deploy business intelligence are¹:

- 1) Better decision-making
- 2) Improved operational efficiency
- 3) Growth in Revenues
- 4) Increased competitive advantage
- 5) Enhanced customer service

¹ <https://www.yellowfinbi.com/YFCommunityNews-Why-you-should-implement-Business-Intelligence-141076>

Objective of Business Intelligence

- In summary, business intelligence should improve decision making, increase performance measured by key metrics that lead to success, and help an organization achieve strategic business objectives

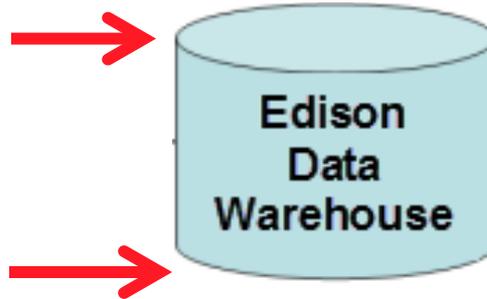
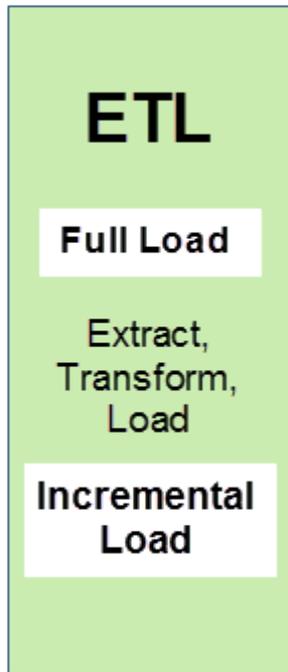
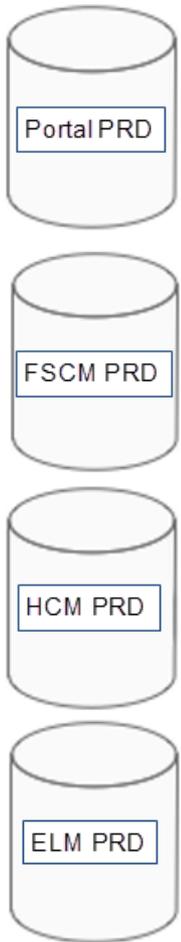
Relax, this line does not represent your employee turnover rate....



...but if it did, how would you take action?

How Edison BI Works: Overview

Edison ERP Databases



Edison Users



Users Requests

Data Returned

Export Content



BI Security

BI Security

- Access to BI Application
- Available Subject Areas
 - Data Marts
 - e.g. payroll data mart
- Access to Folders and its Content
 - Read only versus Read/Write
- Data-Level Security
 - Users granted access to all data in business unit
 - Business unit access determine by Edison security trees
- Functionality
 - Controls the actions a user can perform
 - e.g. create analyses, dashboards, or other content



HCM BI Security Roles

Two Agency Specific Roles

- *HCM Agency BI roles*
 - HCM Author Role (Read/Edit/Create)
 - HCM Consumer Role (Read Only)
- *Edison Security Form*
 - FA-1015 Agency User Security Authorization form



Business Intelligence Access

****Consumer roles DO NOT require a signature**

Edison Business Intelligence		
<input type="checkbox"/> Agency FIN Author	<input type="checkbox"/> Agency FIN Consumer	<input type="checkbox"/> Agency SCM Author
<input type="checkbox"/> Agency SCM Consumer	<input type="checkbox"/> Agency HCM Author	<input type="checkbox"/> Agency HCM Consumer

Navigating to BI

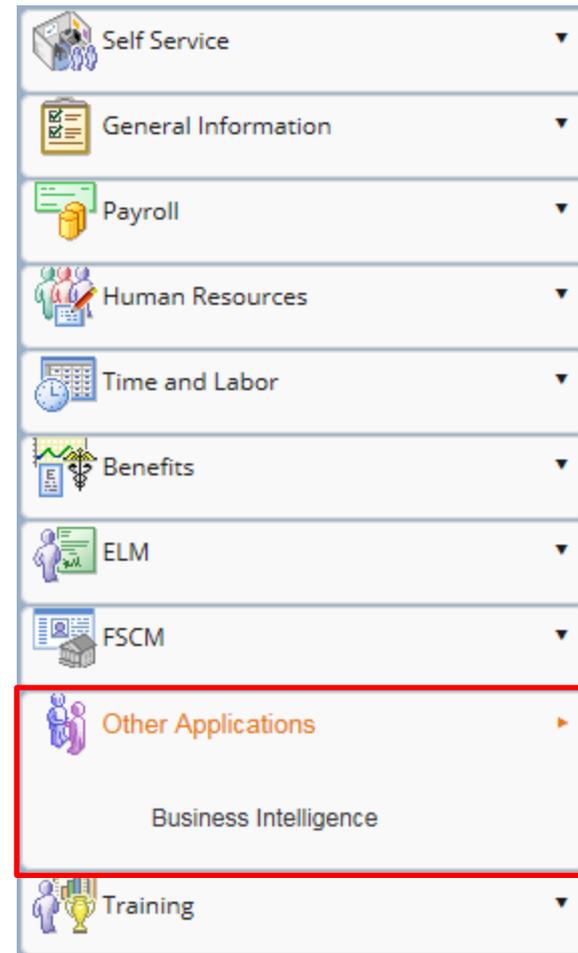
Navigate through Edison

- Single Sign-on
 - No Password Reentry

Breadcrumb Navigation



WorkCenter Navigation



Subject Areas

HCM BI currently has 3 subject areas available

- *Subject areas contain the data used to build reports*
- *Typically represents data produced by a business process*

1) Human Resources – Workforce Profile

- Data: Personal & Employee Attributes and HR Events

2) Human Resources – Compensation Data

- Data: Salary/Comp rates from Job Data

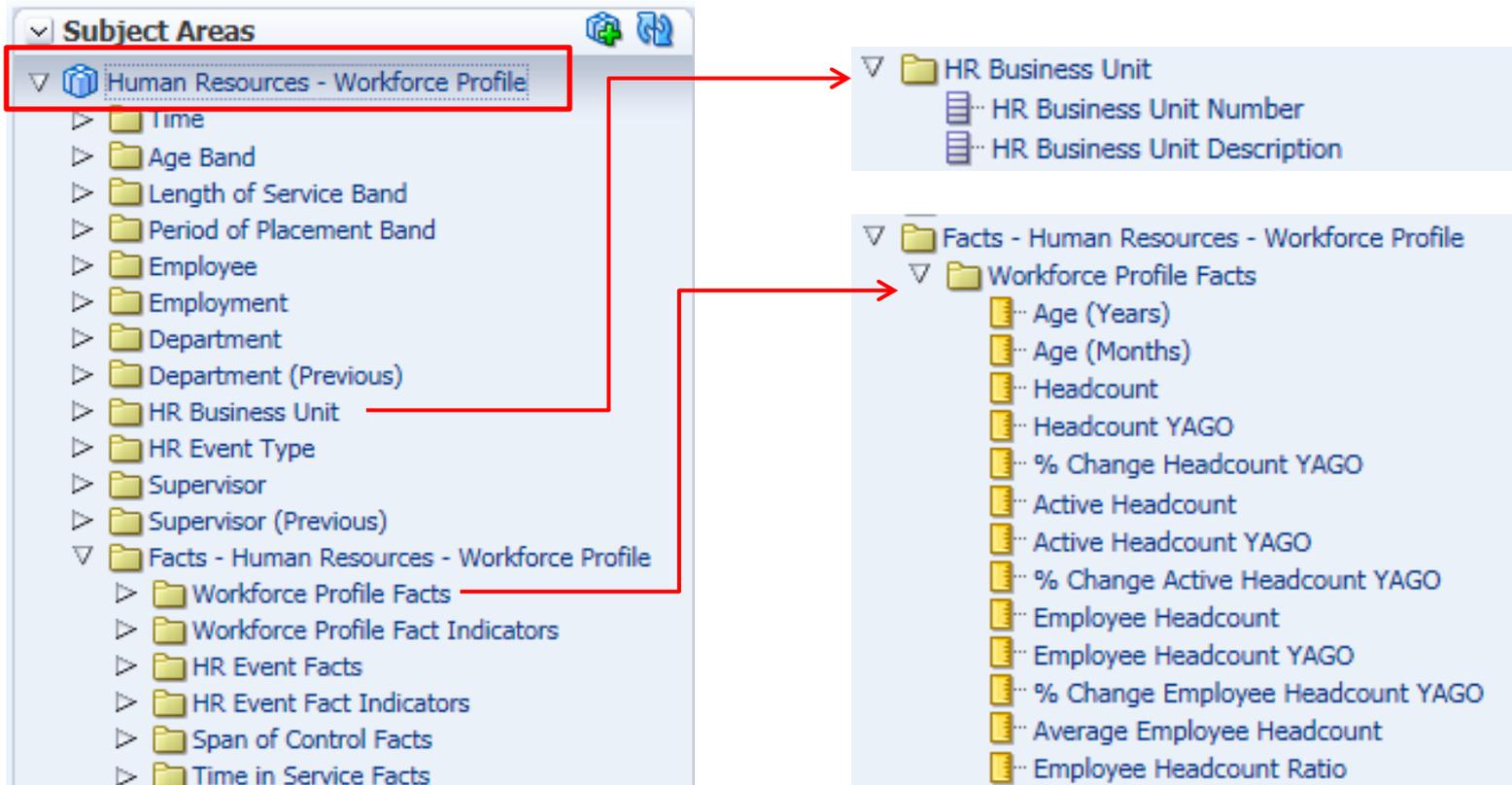
3) Human Resources – Payroll Data

- Data: Confirmed Payroll Processing Transactions

Subject Area Example

Human Resources – Workforce Profile

- Data: Personal & Employee Attributes and HR Events



Self-Service Analytics

Analysis Editor

- Subject Area Content
- Click and Drag Functionality
- Selected Columns
- Filter Criteria
- Results

The screenshot shows the Analysis Editor interface with the following components highlighted by red boxes:

- Criteria Tab:** A red box highlights the 'Criteria' tab, which is the active view.
- Subject Areas Pane:** A red box highlights the 'Subject Areas' pane on the left, showing a tree view of data sources. An arrow points from the 'Employment' folder in this pane to the 'Selected Columns' pane.
- Selected Columns Pane:** A red box highlights the 'Selected Columns' pane, which contains instructions: 'Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.' Below the instructions is a large area labeled 'Drop Columns Here.'
- Filters Pane:** A red box highlights the 'Filters' pane at the bottom, which contains instructions: 'Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.' Below the instructions is a large area labeled 'Add Filters Here.'

Sample Analysis: Statewide Turnover Trend

Step 1: Add Calendar Year Column

The screenshot displays a software interface with four tabs: **Criteria**, **Results**, **Prompts**, and **Advanced**. The **Criteria** tab is active.

Subject Areas: A tree view under "Human Resources - Workforce Pr" shows a "Time" folder. The "Calendar Year" item is highlighted with a red box. A red arrow points from this box to the "Calendar Year" item in the "Selected Columns" pane.

Selected Columns: This pane contains a list of columns: "Time" and "Calendar Year". A text box above the list reads: "Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop to delete by clicking or hovering over the button next to its name."

Filters: This pane contains a text box: "Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or add button after selecting its name in the catalog pane." Below this is the text "Add Filters Here."

Sample Analysis: Statewide Turnover Trend

Step 2: Add Employee Turnover % Column

The screenshot displays a software interface with four tabs: Criteria, Results, Prompts, and Advanced. The 'Criteria' tab is active, showing a tree view of 'Subject Areas'. Under 'Human Resources - Workforce Profile', the 'Facts - Human Resources - Workforce Profile' folder is expanded, and 'Employee Turnover Rate %' is highlighted with a red box. A red arrow points from this box to the 'Selected Columns' pane on the right, which now lists 'Employee Turnover Rate %' under the 'HR Event Facts' category. Below the 'Selected Columns' pane is a 'Filters' section with instructions on how to add filters.

Sample Analysis: Statewide Turnover Trend

Step 3: Add Filter Criteria to Calendar Year

The screenshot displays a software interface with four tabs: 'Criteria', 'Results', 'Prompts', and 'Advanced'. The 'Results' tab is selected and highlighted with a red box. Below the tabs, there is a tree view under 'Subject Areas' with 'Human Resources - Workforce Profile' expanded. The 'Selected Columns' pane shows 'Time' and 'HR Event Facts' with 'Calendar Year' and 'Employee Turnover Rate %' selected. The 'Filters' pane shows a filter for 'Calendar Year' set to 'is between 2009 and 2016', which is also highlighted with a red box.

Criteria **Results** Prompts Advanced

Subject Areas

- Human Resources - Workforce Profile
 - Time
 - Age Band
 - Length of Service Band
 - Period of Placement Band
 - Employee
 - Employment
 - Department
 - Department (Previous)
 - HR Business Unit
 - HR Event Type
 - Supervisor
 - Supervisor (Previous)
 - Facts - Human Resources - Workforce Profile

Selected Columns

Double click on column names in the Subject Areas pane to add filters, apply sorting, or delete by clicking or hovering over the button.

Time	HR Event Facts
Calendar Year	Employee Turnover Rate %

Filters

Add filters to the analysis criteria by clicking on Filter option for the filter by clicking on add button after selecting its name in the category.

Calendar Year is between 2009 and 2016

Sample Analysis: Statewide Turnover Trend

Step 4: Click Results Tab

The screenshot displays a software interface with four tabs: 'Criteria', 'Results', 'Prompts', and 'Advanced'. The 'Results' tab is active. On the left, a tree view under 'Subject Areas' shows a hierarchy starting with 'Human Resources - Workforce Profile', which includes folders for 'Time', 'Age Band', 'Length of Service Band', 'Period of Placement Band', 'Employee', 'Employment', 'Department', 'Department (Previous)', 'HR Business Unit', 'HR Event Type', 'Supervisor', 'Supervisor (Previous)', and 'Facts - Human Resources - Workforce Profile'. On the right, a 'Compound Layout' panel contains two sections: 'Title' and 'Table'. The 'Table' section displays a table with the following data:

Calendar Year	Employee Turnover Rate %
2009	11.56
2010	14.67
2011	14.62
2012	15.52
2013	16.31
2014	17.47
2015	19.43
2016	7.94

Sample Analysis: Statewide Turnover Trend

Step 5: Create a Graph - Click Create View > Graph > Line

The screenshot displays a software interface with a 'Views' menu open. The 'Graph' option is selected, and the 'Line' sub-option is highlighted. A 'Compound Layout' window is visible, showing a table of data:

Calendar Year	Employee Turnover Rate %
2009	11.56
2010	14.67
2011	14.62
2012	15.52
2013	16.31
2014	17.47
2015	19.43
2016	7.94

Sample Analysis: Statewide Turnover Trend

Step 6: Review Graph and Edit

The screenshot shows a software interface for reviewing and editing a line graph. The graph displays the Employee Turnover Rate % from 2009 to 2016. The rate starts at approximately 11% in 2009, rises to about 14% in 2010, remains stable until 2011, then gradually increases to a peak of about 19% in 2015, before dropping sharply to about 8% in 2016.

The interface includes a 'Graph' tab with 'Criteria', 'Results', 'Prompts', and 'Advanced' sub-tabs. A 'Subject Areas' tree on the left lists various categories under 'Human Resources - Workforce Profile'. The 'Layout' section contains 'Graph Prompts', 'Sections', and 'Line Graph' settings. The 'Line Graph' settings are highlighted with a red box and include:

- Measures:** Employee Turnover Rate %
- Line:** Group By (Horizontal Axis) set to Calendar Year, Vary Color By (Horizontal Axis) set to Show In Legend, and Measure Labels checked.

A 'Sample' preview shows a smaller version of the graph. A 'Done' button is highlighted with a red box in the top right corner. An 'Excluded' button is highlighted with a red box at the bottom left.

Calendar Year	Employee Turnover Rate %
2009	11
2010	14
2011	14
2012	15
2013	16
2014	17
2015	19
2016	8

Sample Analysis: Statewide Turnover Trend

Step 7: Add Graph to Layout

The screenshot displays a BI tool interface with a 'Compound Layout' containing three components: a Title, a Table, and a Graph. The Table component shows the following data:

Calendar Year	Employee Turnover Rate %
2009	11.56
2010	14.67
2011	14.62
2012	15.52
2013	16.31
2014	17.47
2015	19.43
2016	7.94

The Graph component is a line chart titled 'Employee Turnover Rate %'. The Y-axis is labeled 'Employee Turnover Rate %' and ranges from 0.00 to 24.00. The X-axis is labeled 'Calendar Year' and ranges from 2009 to 2016. The chart shows a steady increase in turnover from 2009 to 2015, followed by a sharp decline in 2016.

Sample Analysis: Statewide Turnover Trend

Step 8: Analyze Results

- What story is this graph telling, *ignoring 2016 data*?



BI Answers

Enables end users to answer questions quickly

- How many active statewide employees?

Employee Headcount
43,287

- Per Business Unit?

HR Business Unit Number	Employee Headcount
30101	440
30150	14
30227	656
30301	270
30410	1,152

- Per Department?

HR Business Unit Number	Department Number	Employee Headcount
30101	3010100001	9
	3010100002	9
	3010100003	31
	3010100004	1
	3010700001	100

- Per Job Code?

Job Code	Employee Headcount
002149	321
002184	50
002320	56
002322	14
002340	4
002350	169
002360	178
002361	43
002362	23
002363	13

BI Answers

Enables end users to answer questions quickly

- What is the statewide employee turnover rate for 2015?

Employee Turnover Rate %
19.43

- Per Business Unit?

HR Business Unit Number	Employee Turnover Rate %
30101	23.83
30150	24.00
30227	9.58
30301	13.41
30410	7.59

- Per Department?

HR Business Unit Number	Department Number	Employee Turnover Rate %
30101	3010100001	23.53
	3010100002	47.06
	3010100003	84.38
	3010100004	0.00
	3010700001	7.88

- Per Job Code?

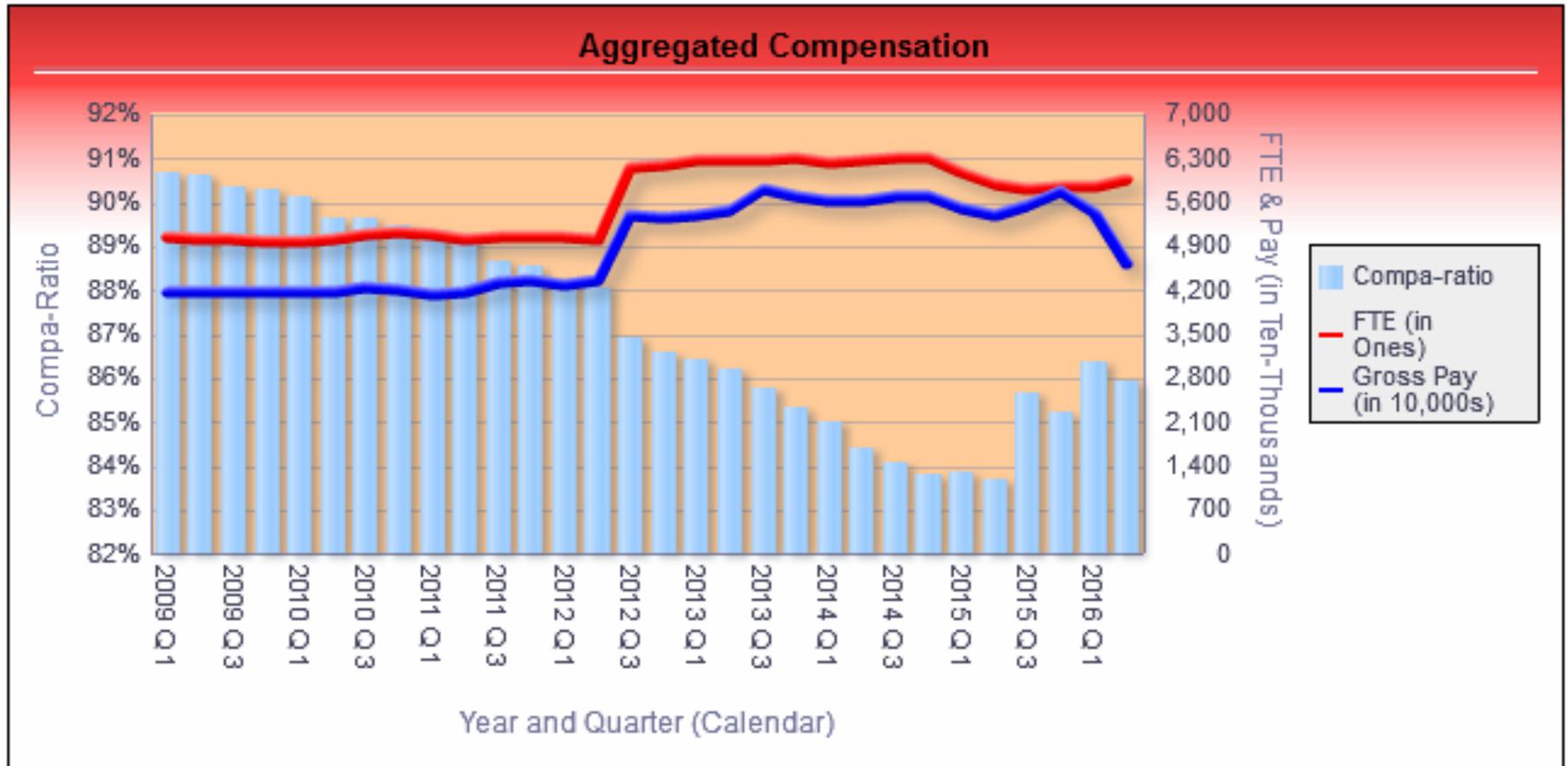
Job Code	Employee Turnover Rate %
002149	15.43%
002184	22.64%
002320	822.22%
002322	1200.00%
002350	17.93%
002360	8.67%
002361	11.63%
002362	4.35%
002363	15.38%

BI Analytics & Visualizations

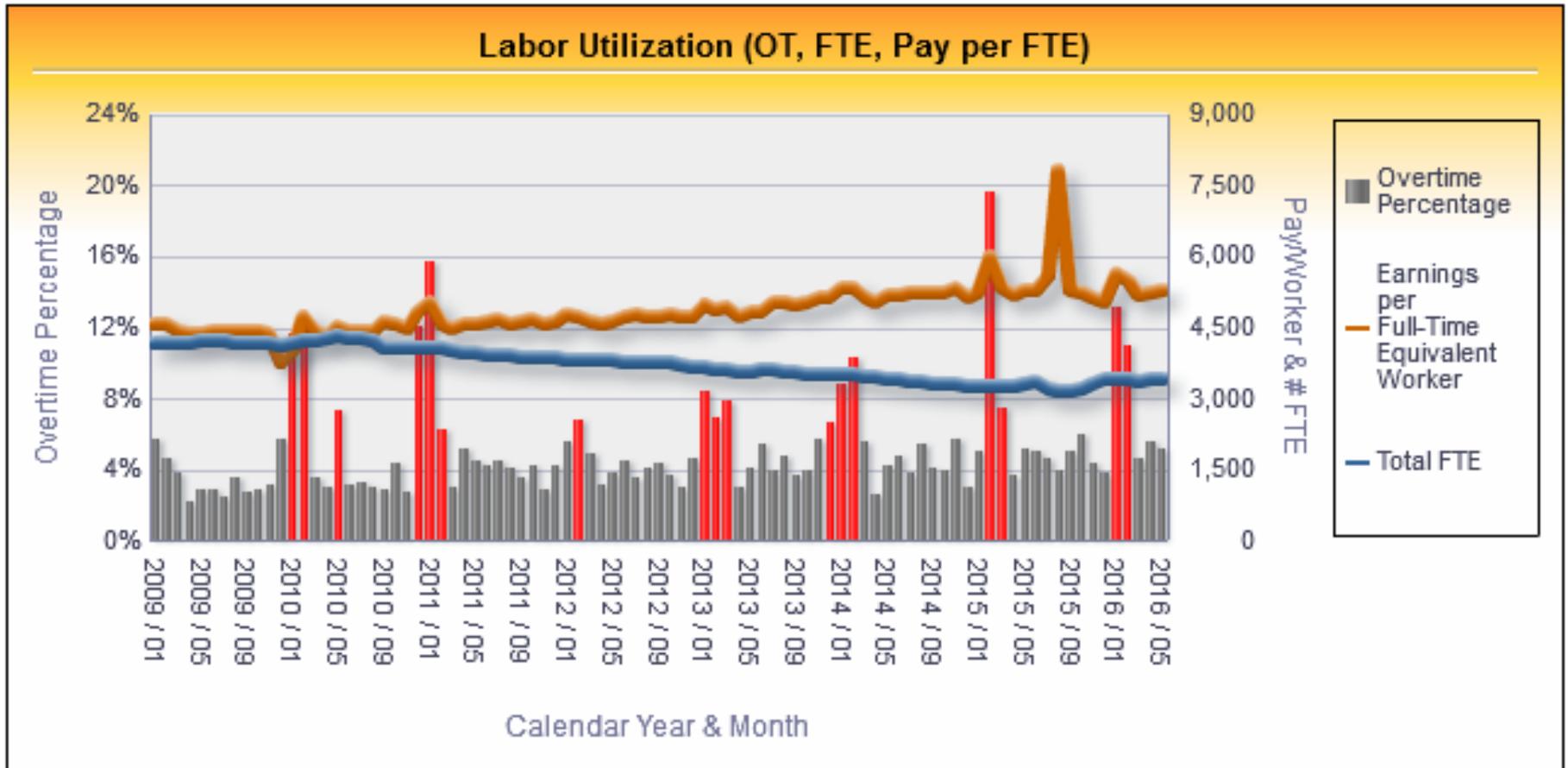
End users gain insight into data and see the “story”



Story #1: The Merger

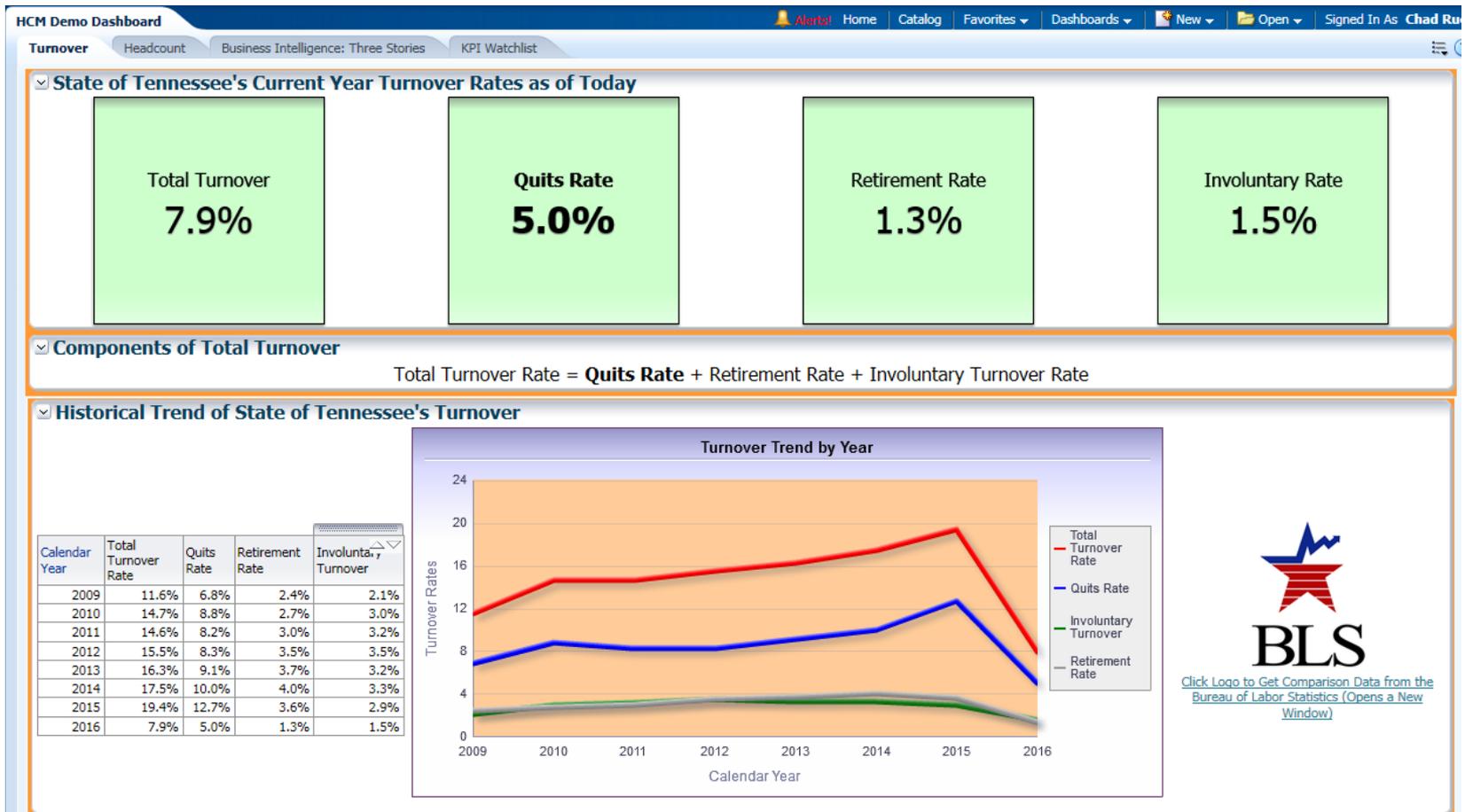


Story #2: Climate Change



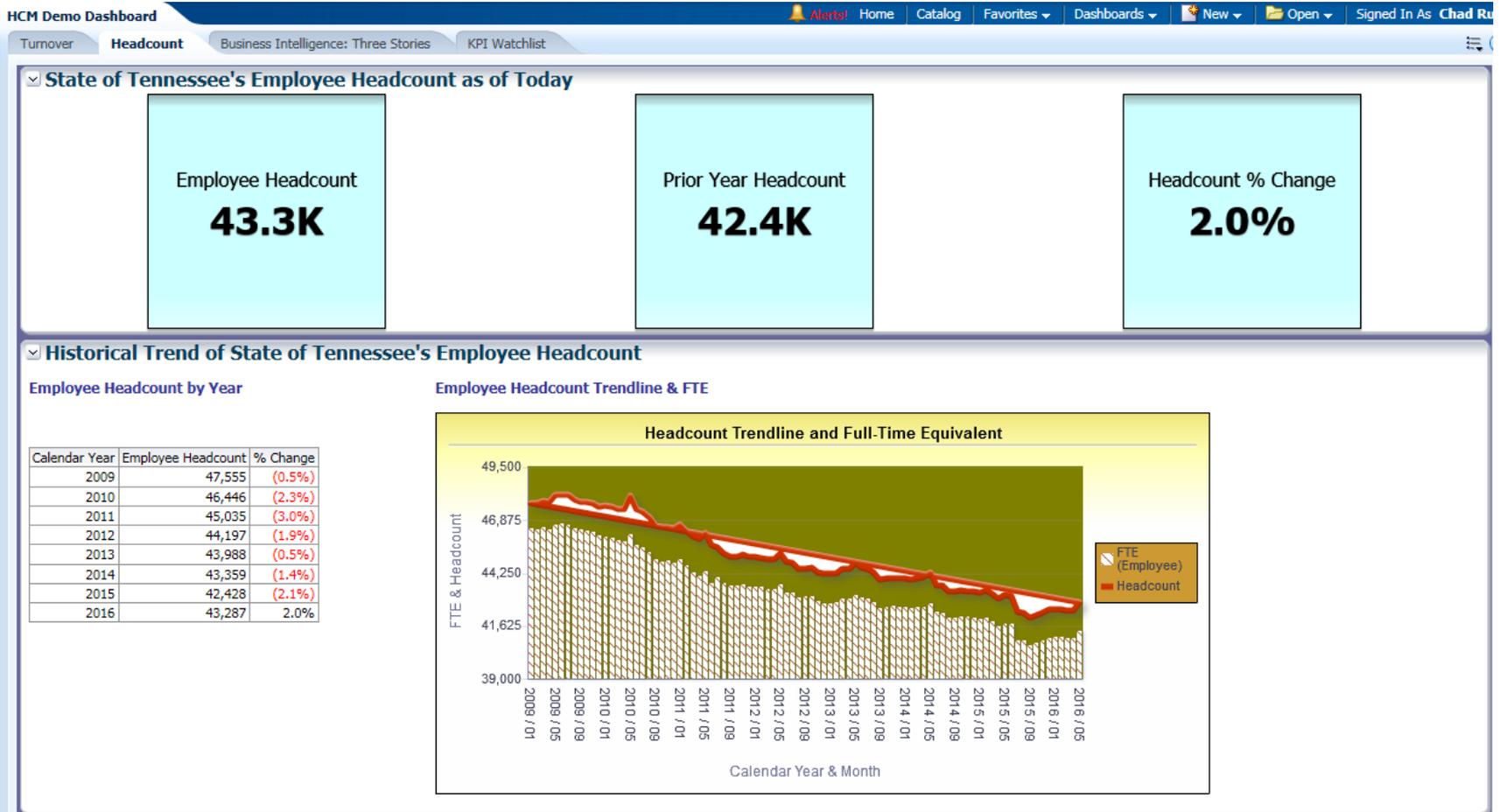
Dashboards

Content arranged into logical groupings per user's requirements



Dashboards

Content structure remains and data updated when accessed



Automated Alerts > Agents

Schedule the Agent

- BI has the ability to send automated alerts based on a schedule or condition
- This example uses a schedule rather than a condition

General **Schedule** Condition Delivery Content Recipients Destinations Actions

When do you want the Agent to be scheduled to run?

Enabled

Frequency

On first Of January February March
 April May June
 July August September
 October November December

Day

Start

Re-run Agent Every Minutes

Until

End No end date Select end date

Automated Alerts > Agents

Select Delivery Content

- Deliver to body of email or as an attachment with note

General Schedule Condition **Delivery Content** Recipients Destinations Actions

Specify the content to deliver with the Agent

Subject

Content
/My Folders/DOHR HR Conference 2016-07-19/Turnover by Year Trend

Format

Delivery Deliver results directly
 Deliver as attachment

Attachment Note

Your monthly employee turnover rate trend report is attached. Please let me know if you have any questions.

Best Regards,
Your favorite Business Intelligence Analyst

Automated Alerts > Agents

Choose Recipients

- Send content to a BI user or email address

General Schedule Condition Delivery Content **Recipients** Destinations Actions

Direct Agent Recipients
Specify who will receive this Agent.

Select Recipients

Show All   

Name
 Chad Rue
 chad.rue@tn.gov

Use Analysis

Get Recipients from the / Analysis

Automated Alerts > Agents

BI Alert

- Content delivered to BI user and accessed within BI application

The screenshot displays a BI application interface with a navigation bar at the top containing 'Alerts!', 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed In As'. Below the navigation bar is an 'Alerts' window. The window contains a table of alerts with columns for Name, Priority, Last Delivered, and Recurrence. The 'Employee Turnover Trend' alert is highlighted with a red box. A modal window is open over the alert, showing details such as Priority (Normal), Delivered (7/18/2016 12:10 PM), Recurrence (1), and Source Agent (Employee Turnover by Year). The modal also displays a 'Turnover by Year Trend' table with the following data:

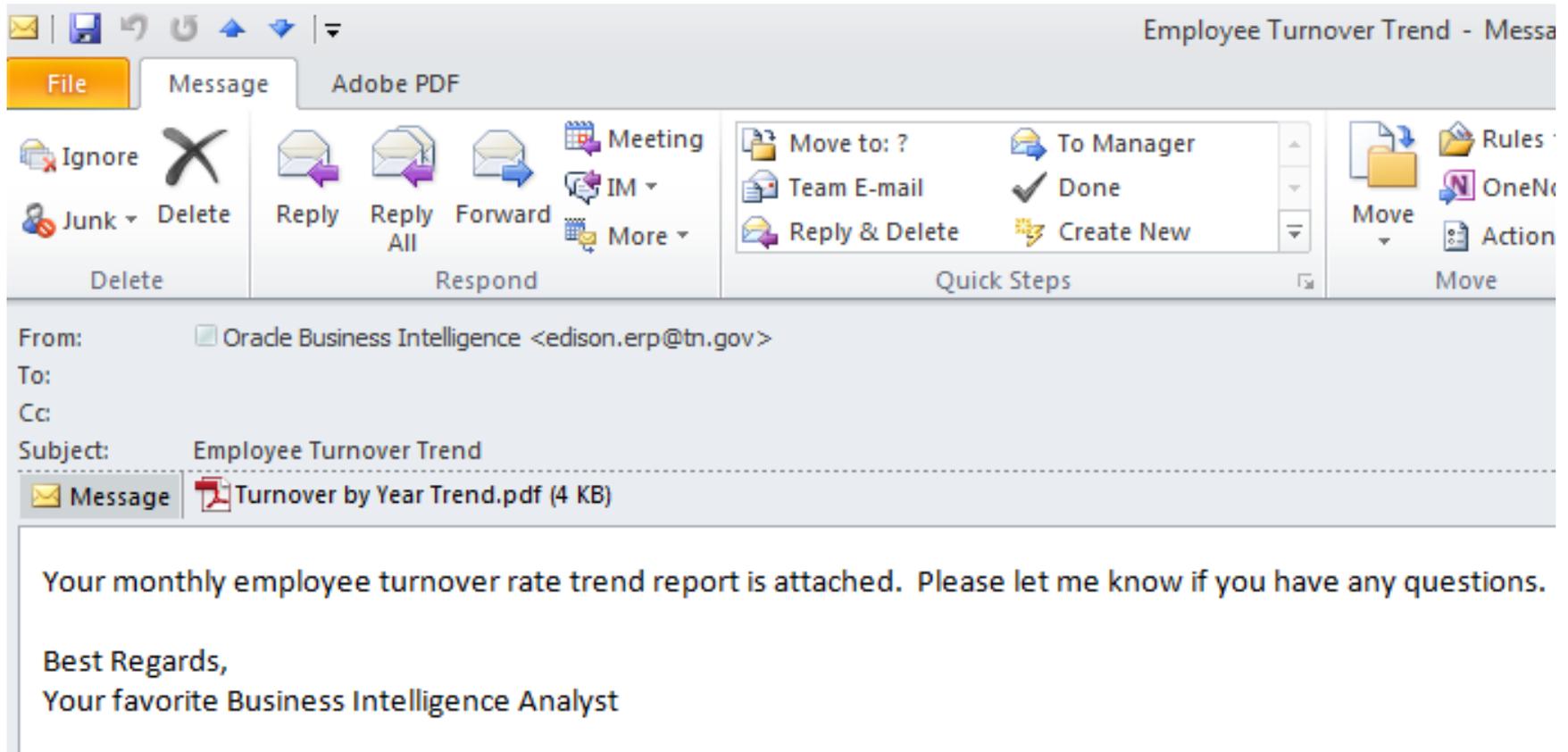
Calendar Year	Employee Turnover Rate %
2009	11.56
2010	14.67
2011	14.62
2012	15.52
2013	16.31
2014	17.47
2015	19.44
2016	8.99

Buttons for 'Refresh' and 'OK' are visible at the bottom of the modal window.

Automated Alerts > Agents

Email Delivery

- Content delivered to recipient's email address



The screenshot displays an email client interface. At the top, the title bar reads "Employee Turnover Trend - Message". Below it, a ribbon contains tabs for "File", "Message", and "Adobe PDF". The ribbon includes various action buttons: "Ignore", "Delete", "Reply", "Reply All", "Forward", "Meeting", "IM", "More", "Move to: ?", "Team E-mail", "Reply & Delete", "To Manager", "Done", "Create New", "Move", and "Action". The email header shows: "From: Orade Business Intelligence <edison.erp@tn.gov>", "To:", "Cc:", and "Subject: Employee Turnover Trend". Below the header, a message bar indicates "Message" and "Turnover by Year Trend.pdf (4 KB)". The main body of the email contains the text: "Your monthly employee turnover rate trend report is attached. Please let me know if you have any questions." followed by "Best Regards," and "Your favorite Business Intelligence Analyst".

Catalog

BI catalog enables users to store created content

- Each user has a My Folder for personal storage use

The screenshot displays the BI Catalog interface. The top navigation bar includes 'Catalog', 'Alerts!', 'Home', and 'Cat'. The main area is divided into a left sidebar and a main content area. The sidebar shows a 'Folders' tree with 'My Folders' expanded, and a 'Tasks' section for the selected folder. The main content area shows a list of items, including folders and reports, with details such as last modified date and owner.

Folder Structure (Left Sidebar):

- My Folders
 - 11_19_2013 Training Dashboard
 - 4-22-2014 Workshop
 - Subject Area Contents
 - My Dashboard
 - BI APPS UPGRADE
 - DOHR HR Conference 2016-07-19**
 - Drill Down Report Example
 - IE 10 TEST Dashboard Folder
 - Issues in BI Reports
 - Jeffrey Kent

Tasks (Left Sidebar):

- DOHR HR Conference 2016-07-19
 - Expand
 - Delete
 - Copy
 - Paste
 - Rename
 - Create Shortcut
 - Properties

Content List (Main Area):

Type	Name	Last Modified	Owner
Folder	Organize Content Here	7/13/2016 10:59:41 AM	Chad Rue
Folder	Save Content Here	7/13/2016 10:54:54 AM	Chad Rue
Folder	Save More Content Here	7/13/2016 11:00:17 AM	Chad Rue
Report	Compa-Ratio by Year Trend	7/12/2016 4:14:12 AM	Chad Rue
Report	Employee Turnover by Year	7/12/2016 4:14:12 AM	Chad Rue
Report	Headcount by Year Trend	7/12/2016 4:14:12 AM	Chad Rue
Report	Turnover by Year Trend	7/12/2016 4:14:12 AM	Chad Rue

Analytical versus Transactional

Analytical

- How many employees are hired each month, quarter, or year?
- How many employees separated last month, quarter, or year?
- How are annual total gross wages trending in relation to employee headcount?
- What percentage of employees separate within one year of the last hire date?
- Are employees in this job series paid above or below midpoint?
- What is the total employee turnover trend for the last five years?

Transactional

- Has the hire transaction been approved?
- Is the employee active or separated?
- Was an employee paid correctly for the pay period?
- Has all time been entered for the pay period?
- Has all payable time been approved?
- Does the potential new hire have any prior job history with the State?
- What is an employee's current home address, email address, or phone number?

Understanding How to Schedule Queries & Delivery Options

The logo consists of a red square with the letters 'TN' in white, serif font. Below the square is a thin dark blue horizontal bar.

TN

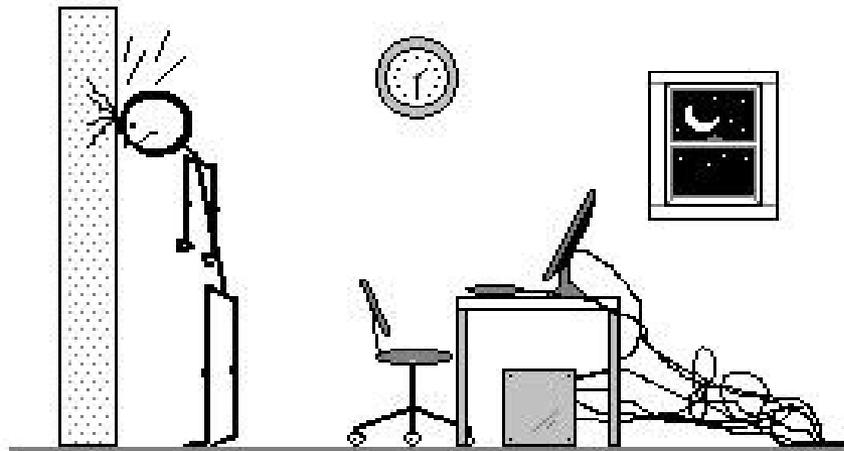
®

David Case

Does this look Familiar?

Process Monitor Screen:

Process List										Personalize	Find	View All			First	1-50 of 84	Last	
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details									
<input type="checkbox"/>	5671340		Application Engine	PSQUERY	willd0103002	07/19/2016 9:25:00AM CDT	Queued	N/A	Details									
<input type="checkbox"/>	5671338		Application Engine	PSQUERY	willd0103002	07/19/2016 9:25:48AM CDT	Queued	N/A	Details									
<input type="checkbox"/>	5671337		Application Engine	PSQUERY	willd0103002	07/19/2016 9:27:15AM CDT	Queued	N/A	Details									
<input type="checkbox"/>	5671335		Application Engine	PSQUERY	willd0103002	07/19/2016 9:28:46AM CDT	Queued	N/A	Details									



Running the Same Query Multiple Times

Process Monitor Screen:

Process List										Personalize	Find	View All			First	1-50 of 84	Last	
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details									
<input type="checkbox"/>	5671340		Application Engine	PSQUERY	willd0103002	07/19/2016 9:25:00AM CDT	Queued	N/A	Details									
<input type="checkbox"/>	5671338		Application Engine	PSQUERY	willd0103002	07/19/2016 9:25:48AM CDT	Queued	N/A	Details									
<input type="checkbox"/>	5671337		Application Engine	PSQUERY	willd0103002	07/19/2016 9:27:15AM CDT	Queued	N/A	Details									
<input type="checkbox"/>	5671335		Application Engine	PSQUERY	willd0103002	07/19/2016 9:28:46AM CDT	Queued	N/A	Details									

Process Monitor = Traffic Cop:

- If query is "Queued", no need to run again
- Queries run in sequential order
- Next query in queue will not run until the previous query finishes
- Stacking up the queue can cause system latency!

Using Same Run Control for Different Queries

Process Monitor Screen:

Process List										Personalize	Find	View All			First	1-50 of 84	Last	
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details									
<input type="checkbox"/>	5671340		Application Engine	PSQUERY	willd0103002	07/19/2016 9:25:00AM CDT	Queued	N/A	Details									
<input type="checkbox"/>	5671338		Application Engine	PSQUERY	willd0103002	07/19/2016 9:25:48AM CDT	Queued	N/A	Details									
<input type="checkbox"/>	5671337		Application Engine	PSQUERY	willd0103002	07/19/2016 9:27:15AM CDT	Queued	N/A	Details									
<input type="checkbox"/>	5671335		Application Engine	PSQUERY	willd0103002	07/19/2016 9:28:46AM CDT	Queued	N/A	Details									

Using the same Run Control for multiple queries can produce unexpected results.

If you plan to schedule multiple queries at the same time, use a unique Run Control ID.

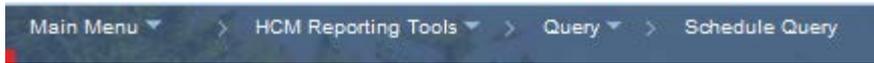
Run Control ID

What is a Run Control ID?

- Unique Identifier which allows you to:
 - Define the query/report
 - Set the parameters/prompts
 - Select a format
 - Schedule run time/date

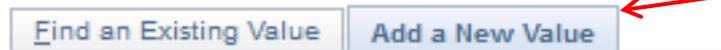
- Required when running a query/report

How to Set Up a Run Control ID



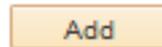
Navigation

Schedule Query



Click Add a New Value

Run Control ID:



Enter new Run Control ID

Tips for creating a Run Control ID:

- No Spaces (use _)
- No Special Characters (% , @ , & , \$)
- Can not be deleted

Recommendations:

- Description of query
- Actual query name

Test Run Control IDs

Schedule Query

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Search by: Run Control ID ▼ begins with

Case Sensitive

Search

[Advanced Search](#)

Search Results

View All	First	1-2 of 2	Last
Run Control ID	Description	Query Name	
query	Payable Time - No Reports To	TN_TL03B_PAYABLE_TIME_APPRV_BU	
query2	Exceptions - No Reports To	TN_TL04B_TL_EXCEPTIONS_BU	

How to Set Up a Run Control ID (continued)

Search for Query:

Schedule Query

Run Control ID: query3 Report Manager Process Monitor Run

Query Name: Search ← **Search Button**

*Description:

Save Add Update/Display

Query Name

Naming Convention:

TN_TL = Time & Labor

TN_HR = Human Resources

TN_BA = Benefits

TN_PY = Payroll

TN_AM = Absence Mgmt

Scheduled Query Search Page

*Query Type:

Query: Search

Results

Query		
TN_TL03B_PAYABLE_TIME_APPRV	Payable time - No reports to	Public
TN_TL03B_PAYABLE_TIME_APPRV_BU	Payable Time - No Reports To	Public
TN_TL03B_PAYABLE_TIME_APPRV_GP	Pble Time Needing Appr-All BUs	Public
TN_TL03B_PAYABLE_TIME_APPR_GRP	Payable Time - No Reports To	Public
TN_TL03_PAYABLE_TIME_APPRV_BU	Pyble Time-Includes Reports To	Public
TN_TL03_PAYABLE_TIME_APPRV_GRP	Pyble time-Includes Reports To	Public

Return

Update Parameters

Use Update Parameters Link

Run Control ID: query

Report Manager

Process Monitor

Run

Query Name: TN_TL03B_PAYABLE_TIME_APPRV_BU

Search

*Description: Payable Time - No Reports To

Update Parameters

Prompt Name	Value
BUSINESS UNIT	

Run Button

TN_TL03B_PAYABLE_TIME_APPRV_BU

Business Unit:

Pay Period Begin Date:

Pay Period End Date:

OK

Cancel

Before you click OK, you have OPTIONS!

Process Scheduler Request

User ID willd0103002

Run Control ID query

Server Name

Run Date 07/13/2016

Recurrence

Run Time 10:19:34AM

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web <input type="text"/>	TXT <input type="text"/>	Distribution

Options....

Process Scheduler Request

User ID willd0103002

Run Control ID query

Server Name

Recurrence

Time Zone

Run Date

Run Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

Run Date/Time

Process Scheduler Request

User ID willd0103002

Run Control ID query

Server Name

Recurrence

Time Zone

Run Date 07/13/2016

Run Time 10:19:34AM

Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

OK

Cancel

Questions:

- When do I need the results?
- How large is the expected output?
- What else is happening in the system?

Recurrence

Process Scheduler Request

User ID willd0103002 Run Control ID query

Server Name

Run Date

Recurrence

Run Time

Time Zone

Select	Description
<input checked="" type="checkbox"/>	PSQUERY

Process Name	Process Type	*Type	*Format	Distribution
PSQUERY	Application Engine	Web	TXT	Distribution

OK Cancel

Every 10 minutes
Every 15 minutes
Every 20 minutes
Every 60 minutes

5thofMon_2300
5thofMon_2305
DAILY1:30AM
DAILY5:00AM
Daily
Daily (M-F) 7 AM
Daily Purge
Daily12:00AM
Daily1:00AM
Daily1:15AM
HR_CUSTOM
LastdayofMonth
M-F at 5pm
MILDAILY
Monthly_14th_5:00am

Never use these options!

What Does a Recurrence Look Like?

Notice the Recurrence Symbol

Process List				Personalize Find View All   First  1-50 of 75  Last						
Select	Instance	Seq.	Process Type	Process Name		User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	5671335		Application Engine	PSQUERY		WILLD0103002	07/13/2016 2:15:00PM CDT	Queued	N/A	Details
<input type="checkbox"/>	5671020		Application Engine	PSQUERY		WILLD0103002	07/14/2016 7:00:00AM CDT	Queued	N/A	Details
<input type="checkbox"/>	5671019		Application Engine	PSQUERY		WILLD0103002	07/14/2016 7:00:00AM CDT	Queued	N/A	Details
<input type="checkbox"/>	5671018		Application Engine	PSQUERY		WILLD0103002	07/14/2016 7:00:00AM CDT	Queued	N/A	Details

Query Delivery Options

1) Email

- Will send email to User IDs listed in the Distribution List
- Will not have results in Process Monitor, only in email

2) Web (Default)

- Results are posted in Process Monitor
- User can be notified by email when query is complete

Email Type

Process Name	Process Type	*Type	*Format	Distribution
3QUERY	Application Engine	Email	TXT	Distribution

Select Email Type

Update the Distribution

Distribution Options

Process Name PSQUERY

Process Type Application Engine

Folder Name **GENERAL** General

Retention Days 31

Email Only

Email Subject Approve Payable Time Email With Log: **Email Web Report:**

Message Text

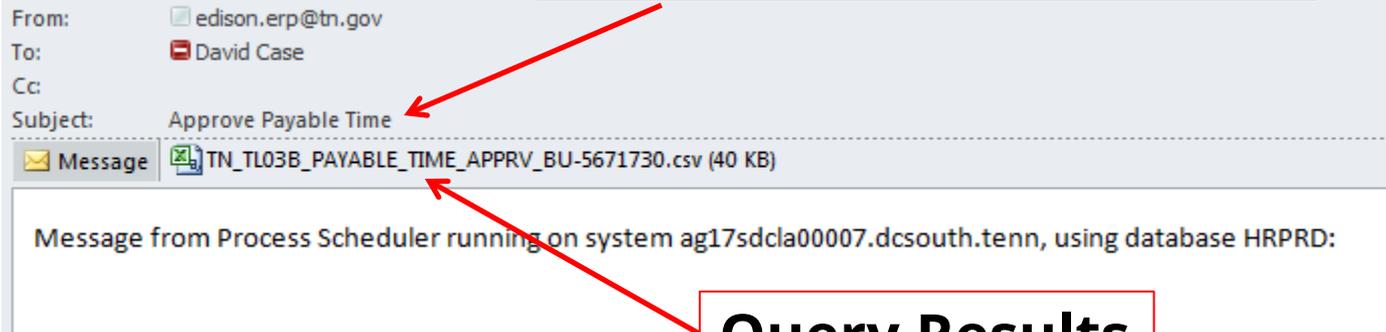
Email Address List

Distribute To

*ID Type	*Distribution ID
User	willd0103002

Email Results

Subject from Setup Page



Query Results

NOTE: View Log/Trace in Process Monitor will not have a copy of the query results, only a .log file will appear.

File List		
Name	File Size (bytes)	D
AE_PSQUERY_5671784.log	60,772	0

Distribute To	
Distribution ID Type	*Distribution ID
User	willd0103002

Web Type

Format – Generates:

HTM HTML Page

PDF PDF Document

TXT CSV file

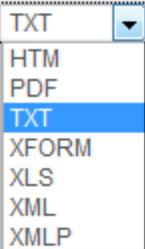
XLS XLSX file

XML XML file

XMLP XML file

Most Commonly Used Formats

Process Name	Process Type	*Type	*Format	Distribution
SQUERY	Application Engine	Web	TXT	Distribution



Web TXT Distribution

Process Name PSQUERY

Process Type Application Engine

Folder Name

Retention Days

Email Only

Email Subject Email With Log: Email Web Report:

Message Text

Email Address List

Distribute To

*ID Type	*Distribution ID
User	willd0103002

Results

Process Monitor Screen:

File List	
Name	File Size (bytes)
AE_PSQUERY_5672767.log	166
TN_TL04B_TL_EXCEPTIONS_BU-5672767.csv	508

Distribute To	
Distribution ID Type	*Distribution ID
User	willd0103002

TXT format generates CSV file

Distributed to my User ID

From: edison.erp@tn.gov
To: David Case
Cc:
Subject: Test Query

This is my test Query!

https://sso.edison.tn.gov/psc/hrprd/EMPLOYEE/HRMS/c/CDM_RPT.CDM_RPT.GBL?Page=CDM

Message Text

Hyperlink

Working with the Results

The screenshot shows the Microsoft Excel interface with the 'Sort & Filter' group in the 'Data' tab ribbon. The 'Filter' button is highlighted with a red arrow. A dropdown menu is open, showing options: 'Sort A to Z', 'Sort Z to A', 'Custom Sort...', 'Filter' (highlighted), 'Clear', and 'Reapply'. Below the ribbon, a table is visible with columns: Business Unit, Dept ID, Location, Pay Group, Exception ID, Exception Description, EmplID, Name, Full/Part, and HR Status.

	A	B	C	D	E	F	G	H	I	J
1	Business Ur	Dept ID	Location	Pay Grov	Exception	Exception Description	Empl	Name	Full/Pa	HR Stat

Drop Down Menus

List of Useful Queries

Human Resources: TN_HR01_HR_QUERY_LIST

Time & Labor, Payroll, Benefits, & Enterprise Learning Management:

- Listed in each module work center navigation



Time & Labor Reports and Queries				Personalize	Find	View All	First	1 of 1	Last
Title	Source	Modified	Summary						
Time and Labor Reports and Queries	Edison	01/02/15	Time and Labor Reports and Queries						

Finding the Right Query

Use Control and F keys to Search Criteria

4	TN_HR04_MY_SYS_PROFIL_ALT_USER	My System Profile Alt UserID	This query was developed to provide a list of employees who have an Alternate User ID listed on the page. The query only returns those with an Effective Date To field value greater than the current date.
5	TN_HR04_MY_SYS_PROFIL_BLANK	My System Profile Email Blank	This query was developed to identify active employees without a My System Profile email address.
6	TN_HR04_MY_SYS_PROFIL_ EMAIL ADR	My System Profile Email Address	
7	TN_HR04_MY_SYS_PROFIL_HOME	My System Profile Home E-mail	
8	TN_HR04_MY_SYS_PROFIL_INVALID	Invalid Email Address	This query was developed to return active employees with an invalid e-mail address under My System

email ^ v Highlight All Match Case 1 of 7 matches

Type in key word to use in search

Filter Option

Exceptions

Employee Selection Criteria

Description	Value
Time Reporter Group	<input type="text"/>
Empl ID	<input type="text"/>
Empl Record	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Job Code	<input type="text"/>
Department	<input type="text"/>
Supervisor ID	<input type="text"/>
Position Number	<input type="text"/>

Clear Selection Criteria Save Selection Criteria Get Employees

Instructions

Allowing an exception will enable the time to be processed and create payable time without having to resolve the exception. Once an exception has been allowed, it will no longer appear on this page. Time that has an exception with a Low or Medium severity level will still create payable time. Exceptions with a source of Time Administration can only be resolved by running the Time Administration process. Payable time will not be created for time with a High severity exception.

Filtering Options

*Date Filter: equal to Start Date:

Employee Filter: equal to Employee ID:

*Exception Filter: equal to Exception ID:

Severity:

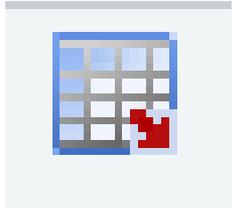
Run Control ID:

Select

The filter option allows you to search specifically for desired results including:

- Empl ID
- Date
- Severity
- Exception ID

Excel Button



Exceptions

Employee Selection Criteria

Employee Selection Criteria ?

Description	Value
Time Reporter Group	FA000
Empl ID	
Empl Record	
Last Name	
First Name	
Job Code	
Department	
Supervisor ID	
Position Number	

Clear Selection Criteria Save Selection Criteria Get Employees

Instructions

Filtering Options

Exceptions Customize Find View 100  First 1-50 of 160 Last

Overview Details

Allow	Exception ID	Description	Date	Name	Job Description	Severity
<input type="checkbox"/>	TN000033	Rptd LV exceeds Approved Req	04/15/2013		ADMIN SECRETARY	High
<input type="checkbox"/>	TN000020	Hours exceed schedule hours	04/01/2013		ADMIN SECRETARY	High
<input type="checkbox"/>	TN000033	Rptd LV exceeds Approved Req	04/09/2013		ADMIN SECRETARY	High

To download Exceptions directly from the Manage Exceptions page, hold the CTRL key + click the Excel icon at the same time. This will download the results into Excel.

Results

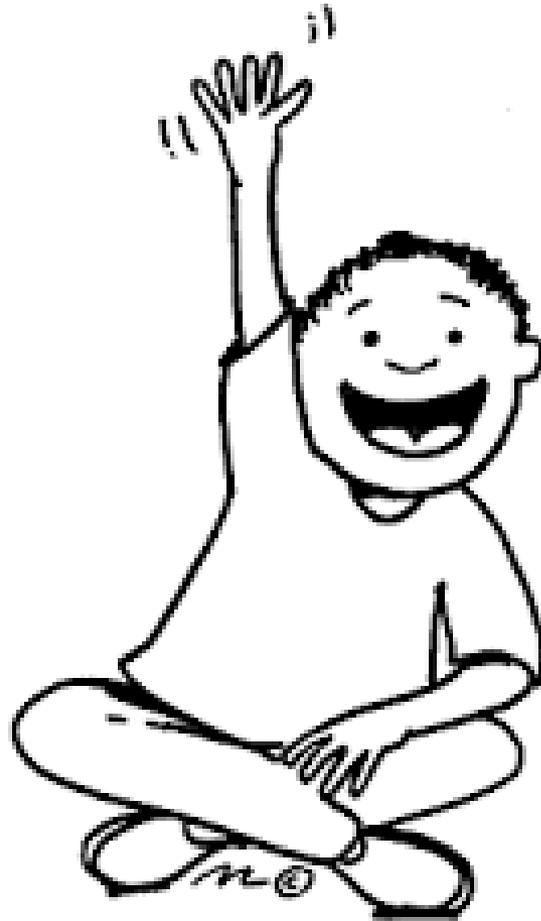
Online Page

Allow	Exception ID	Description	Date	Name	Job Description	Severity
<input type="checkbox"/>	TN000033	Rptd LV exceeds Approved Req	04/15/2013	EMPLOYEE NAME	ADMIN SECRETARY	High
<input type="checkbox"/>	TN000020	Hours exceed schedule hours	04/01/2013	EMPLOYEE NAME	ADMIN SECRETARY	High
<input type="checkbox"/>	TN000033	Rptd LV exceeds Approved Req	04/09/2013	EMPLOYEE NAME	ADMIN SECRETARY	High

Results from the Online Page

	A	B	C	D	E	F	G
1	Allow	Exception ID	Description	Date	Name	Job Description	Severity
2		TN000033	Rptd LV exceeds Approved Req	4/15/2013	EMPLOYEE NAME	ADMIN SECRETARY	High
3		TN000020	Hours exceed schedule hours	4/1/2013	EMPLOYEE NAME	ADMIN SECRETARY	High
4		TN000033	Rptd LV exceeds Approved Req	4/9/2013	EMPLOYEE NAME	ADMIN SECRETARY	High

Questions?





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Technology Solutions

THANK YOU!