

Human Capital Analytics Dashboards (Cognos 12.0.2) Quick Start Guide



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HCA Dashboards

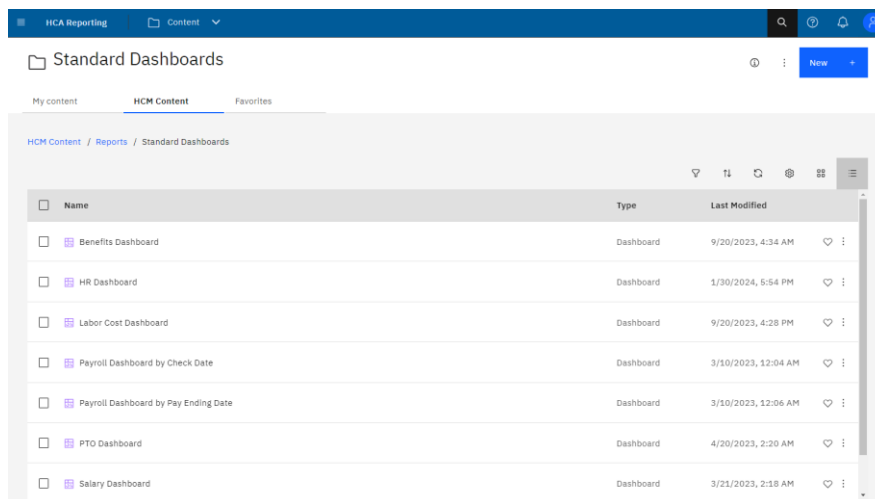
Human Capital Analytics (HCA) Dashboards provide an interactive means of monitoring, measuring, and analyzing key Benefit, HR and Payroll information that is stored and managed in the HCM application. The information is displayed in an interactive, intuitive, and visual way within the HCM Manager Services application. HCA Dashboards will help provide insights to tackle critical human capital challenges.

A library of Standard Dashboards is provided within the HCA Reporting tool. This provides a quick and easy way for users to see visualizations of their HCM data. The user will only need to click on the dashboard name to run it. Additionally, a dashboard can be set as the user's Manager Services home page so that relevant data can be easily viewed when entering the Manager Services application.

This is a quick start document. To see a more complete set of documentation see the full Unicorn HCM Human Capital Analytics User Guide.

Available dashboards

You can find dashboards in HCA Reporting under HCM Content > Reports > Standard Dashboards.



Dashboard security

Similar to Ad Hoc reports written using HCA Reporting, HCM organization security is applied to all HCA Dashboards. A user will only be able to see counts of employees on dashboards that correlate with the employees that they can view in Manager Services. For example, if a user can only view 10 employees in Manager Services then the visualizations in the dashboards will only represent the data for those 10 employees.

Salary Security is enforced. If a user has 'No Salary' access to an employee, then that employee's salary fields will be 0 in the detail reports and their data will not be included on Salary related visualizations on dashboards.

Function security is enforced on the dashboard level. A user must have function security to Work Profile to see the HR Dashboard. A user must have function security to Benefit Enrollment to see the Benefit

Dashboard. A user must have function security to Payment History to see the Payroll Dashboards. A user must have function security to Salary History or Salary Change to see the Salary Dashboards.

Dashboard data

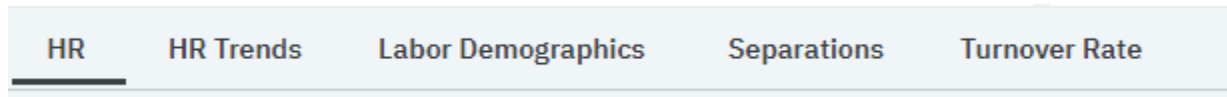
Dashboard data is retrieved from a data warehouse that is refreshed nightly. Same day transactions will not be displayed and should not make significant changes to most visualizations.

Dashboard data will also not be available for Test environments.

How to interact with a dashboard

To run a dashboard, simply navigate to a dashboard in HCA Reporting and click on the dashboard name.

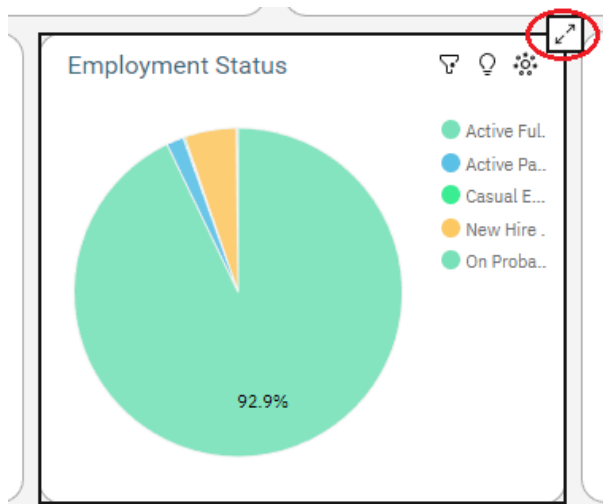
Each dashboard is a collection of visualizations. Related visualizations may be organized by tabs. A dashboard may also be organized into multiple tabs. For the HR Dashboard, you will see 5 tabs. Click on each tab to see different sets of visualizations.



Expand visualizations

To see a larger version of a single visualization, click on the visualization to select it. Then click the expand icon.

Click the Collapse icon to return to the original size.

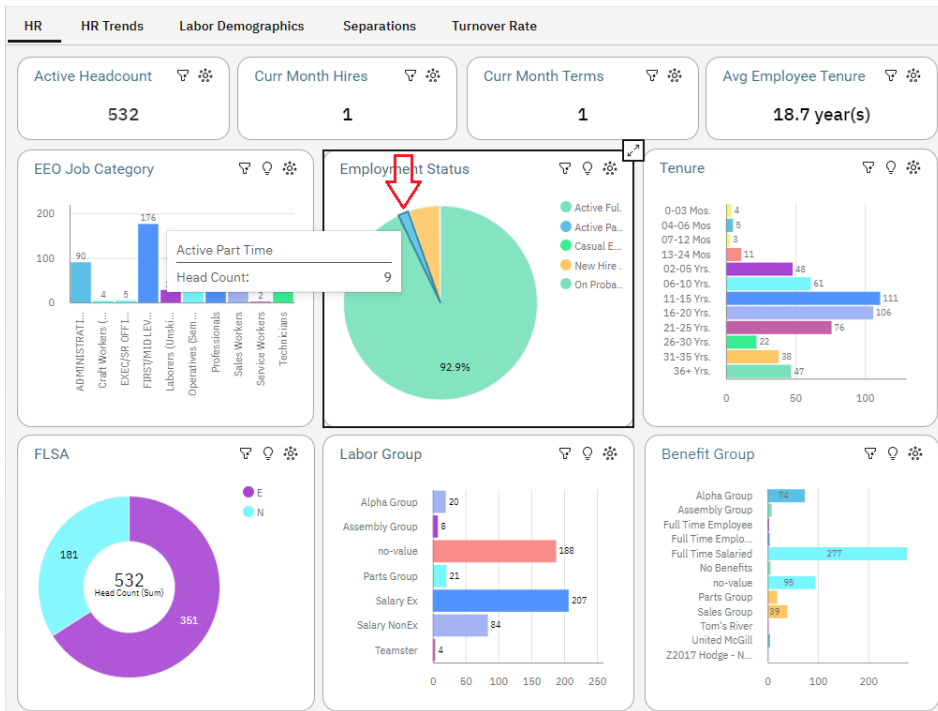


Selecting data

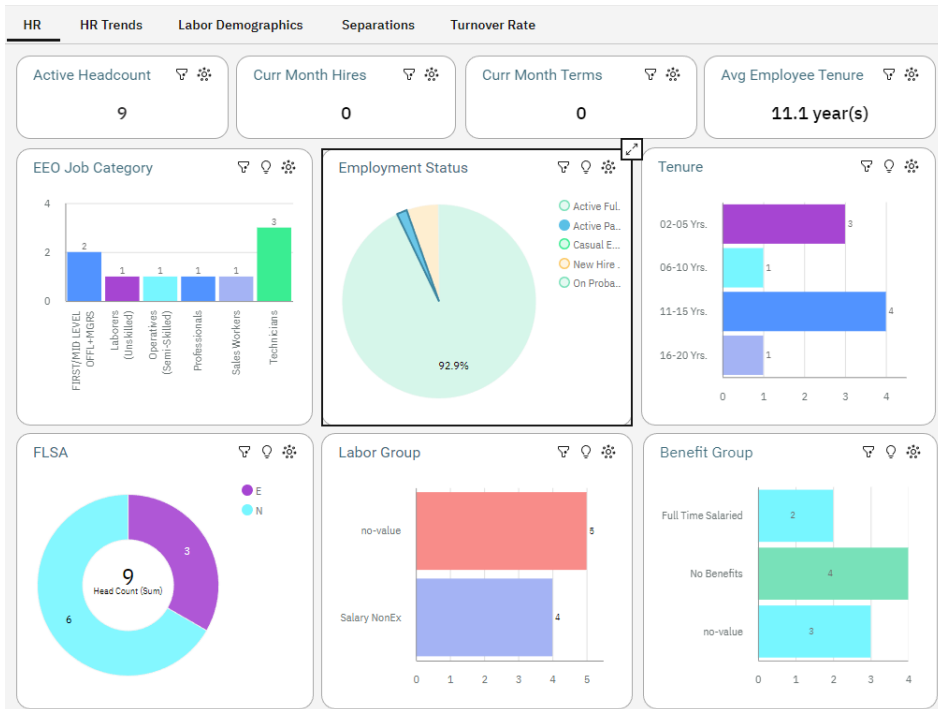
Selecting data in a visualization will update all other visualizations to be filtered by the element clicked.

For example, clicking the “Active Part Time” slice of the Employment Status Pie will cause the other visualizations to update to represent just the Active Part Time employees.

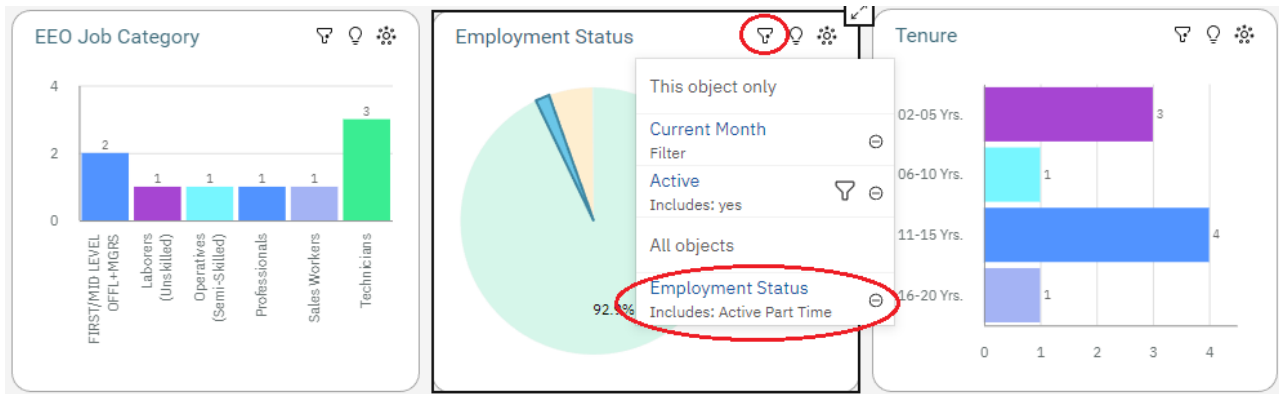
Before:



After clicking on the Active Part Time slice. Notice the other visualizations have updated to just show data for the 9 APT employees in this example.



By clicking the Filter icon on the visualization, you can see "Active Part Time" has been applied to all objects.

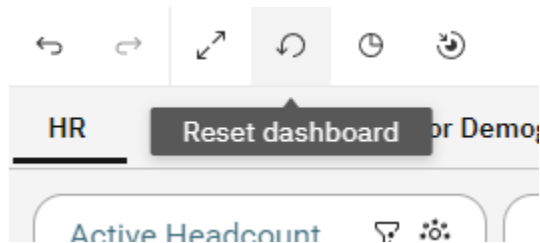


Resetting the dashboard

To get back to the full data in visualizations:

- click on the white space of a visualization
- click x for any filters under All objects (as seen above)
- click the “Reset dashboard” on the top left of the dashboard.

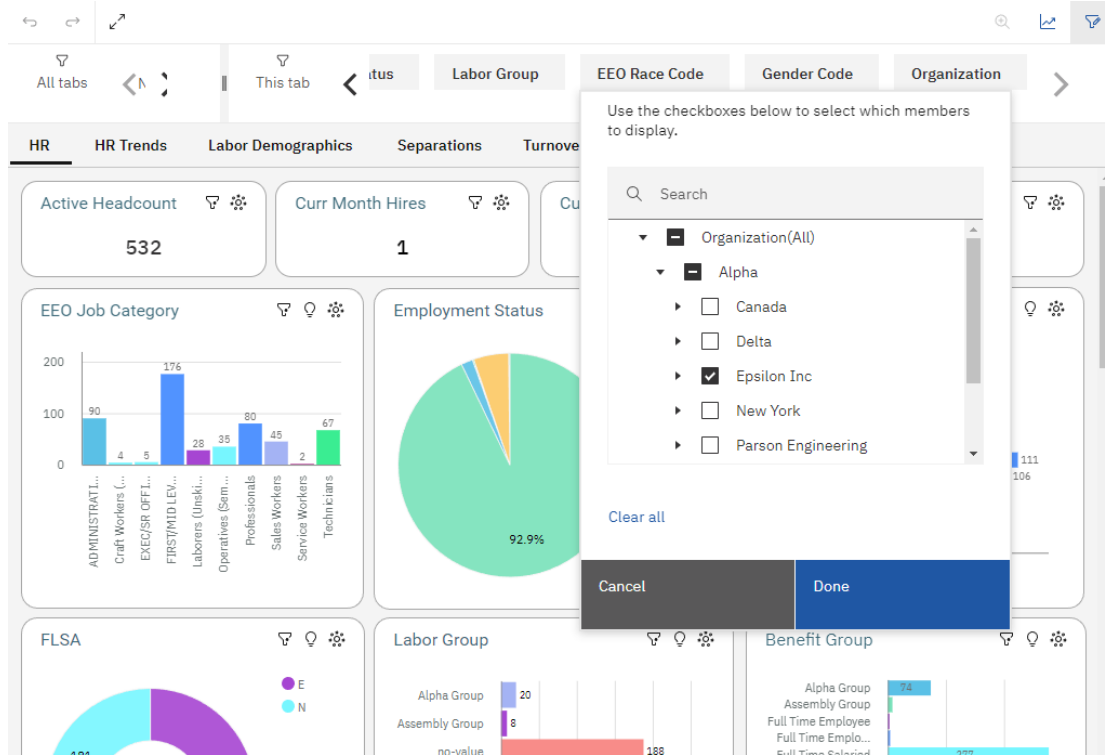
Reset dashboard:



Applying other filters

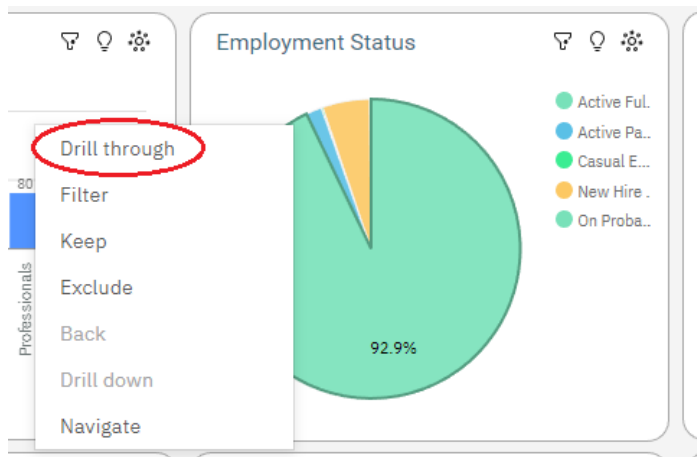
Additional filters maybe applied if available in filter header.

For example, the Organizations filter maybe used to limit data to just certain organization levels.



Drill through to employee details

To see detail data on the employees that make up the selected data element you can drill through to a detail report. To do this, right click on a data element in a visualization and select the “Drill through” link.



In this example, clicking the Drill Through report icon will take you to a list of the 494 Active Full Time employees. Hit the back button on the browser to return to the dashboard.

Current Month Employee Details Report

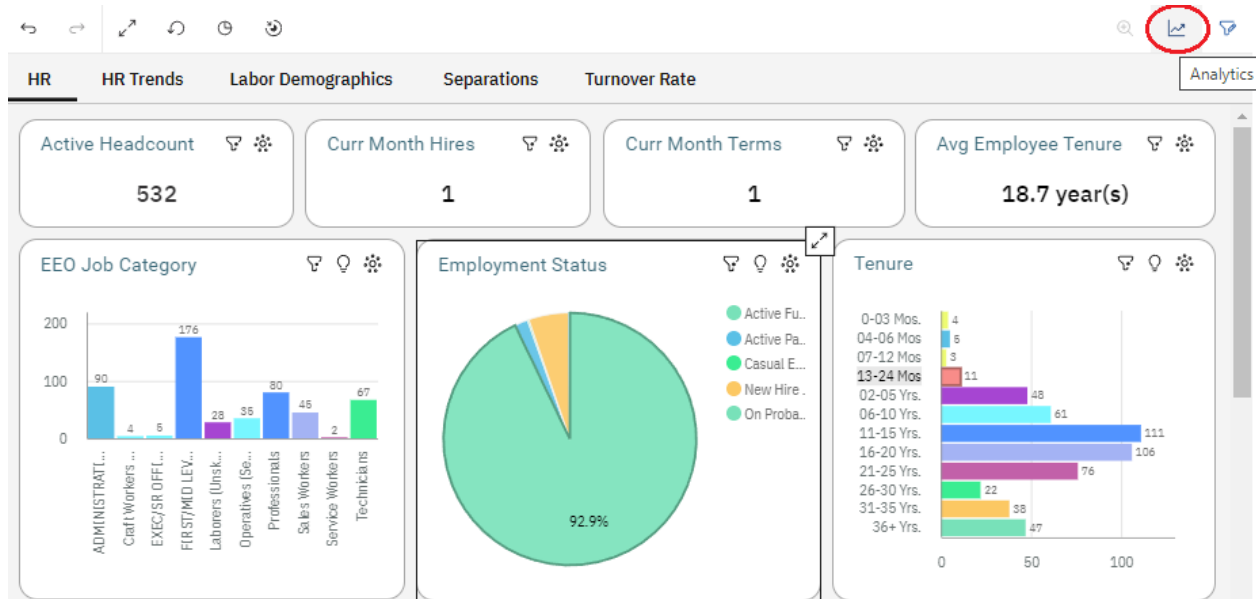
View By

Active = yes Employment Status = Active Full Time


Employee Number	First Name	Last Name	Active	Employment Status	Employment Status Reason	Employment Status Effective Date	Service Years	Labor Group	PTO Group	Benefit Group	FLSA	EEO Job Category	Job Title	Reports To Name	Org Level 1 Desc	Org Level 2 Desc	Org Level 3 Desc	Org Level 4 Desc	Org Level 5 Desc
0005	Angela	Martin	yes	Active Full Time	No Change	2008-02-04		Salary NonEx	Non Exempt	Full Time Salaried	N	ADMINISTRATIVE SUPPORT	Buyer Associate	Pay Admin8	Alpha	Epsilon Inc	Purchasing	Systems	Syracuse
0008	Tracey	Emanus	yes	Active Full Time	No Change	1966-02-01		Salary Ex	Non Exempt	Sales Group	E	Sales Workers	Technical Representative	Darrel Idemoto	Alpha	Epsilon Inc	Sales	Pacific	Toledo
0009	Harmon	Cocar	yes	Active Full Time	No Change	1966-11-14		Assembly Group	Assembly Group	Assembly Group	N	Operatives (Semi-Skilled)	Compounders	Raburn Nowland	Alpha	Epsilon Inc	Production	Systems	Bergenfield
0014	Jared	Bosse	yes	Active Full Time	No Change	1972-05-04		Salary Ex	Non Exempt	Full Time Salaried	E	Technicians	NT Admin	Tarrance Slay	Alpha	Epsilon Inc	Internal	Systems	Syracuse
0017	Kristi	Chapple	yes	Active Full Time	No Change	1975-05-27		Salary NonEx	Non Exempt	Full Time Salaried	N	ADMINISTRATIVE SUPPORT	Customer Service	Israel Brandt	Alpha	Epsilon Inc	Services	Systems	Belmont
0018	Hardy	Gleason	yes	Active Full Time	No Change	1976-09-01		Salary Ex	Non Exempt	Sales Group	E	Sales Workers	Technical Representative	Yoni Hulsey	Alpha	Epsilon Inc	Sales	NorthEast	Toledo
0020	Wildier	Dulaney	yes	Active Full Time	No Change	1977-05-02		Salary Ex	Non Exempt	Full Time Salaried	E	FIRST/MID LEVEL OFFL+MGRS	Group Leader	Jerald Stetar	Alpha	Epsilon Inc	Support	Systems	Tallahassee
0022	Celerino	Madlinski	yes	Active Full Time	No Change	1977-06-20		Salary Ex	Non Exempt	Full Time Salaried	E	Professionals	Senior Scientist	Mairian Barker	Alpha	Epsilon Inc	Development	Systems	Tallahassee
0023	Theresa	Bake	yes	Active Full Time	No Change	2020-07-27		Salary Ex	Non Exempt	Full Time Salaried	E	FIRST/MID LEVEL OFFL+MGRS	Account Manager	Jerald Stetar	Alpha	Epsilon Inc	Internal	Systems	Syracuse
0024	Fihart	Femall	yes	Active Full	No Change	1977-10-03		Salary Ex	Non	Full Time	F	FIRST/MID LEVEL	Division Sales	Rynn	Alpha	Epsilon Inc	Sales	Midwest	Trilark

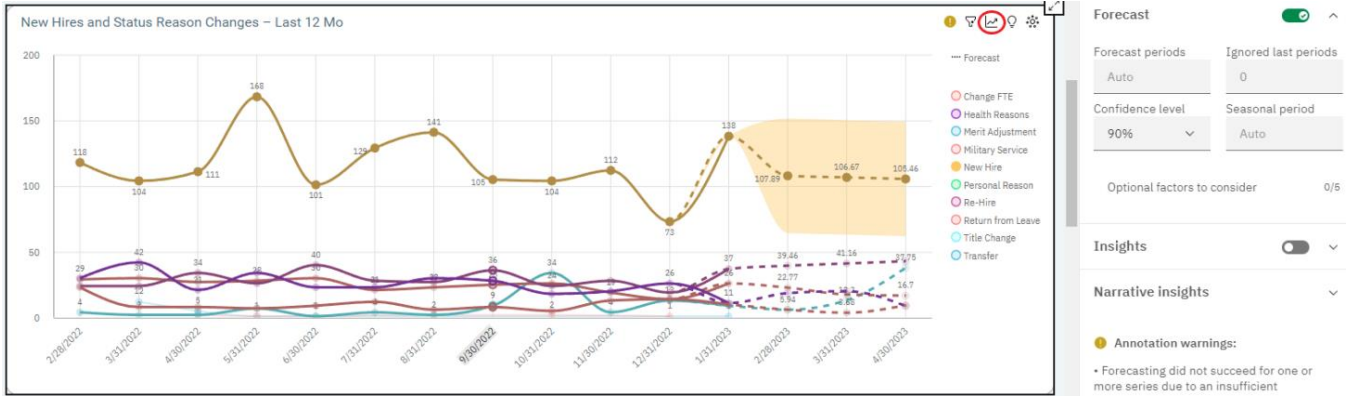
Analytics

To see further insights into the data, select a visualization and then select the Analytics icon.




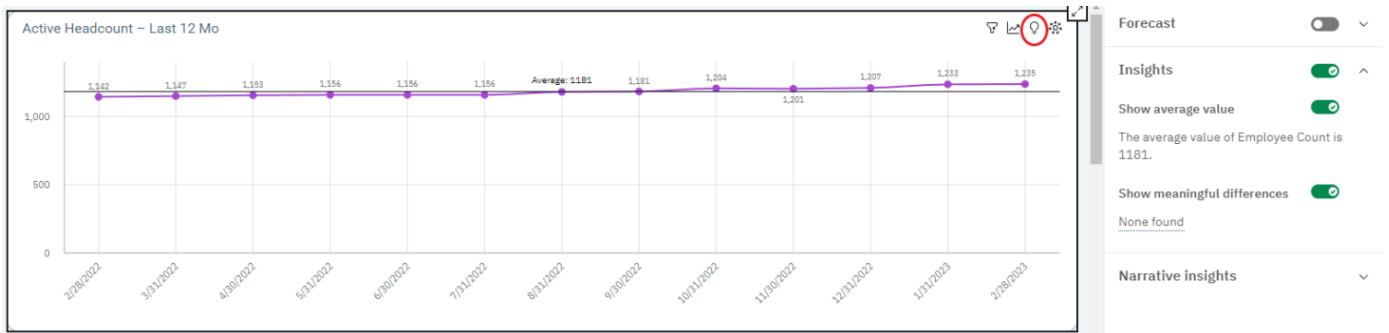
Forecast

For Trend data you can use Forecast to see the values forecasted for the next 3 months. Select the Forecast icon  on the visualization. Options can be selected to adjust the forecast.




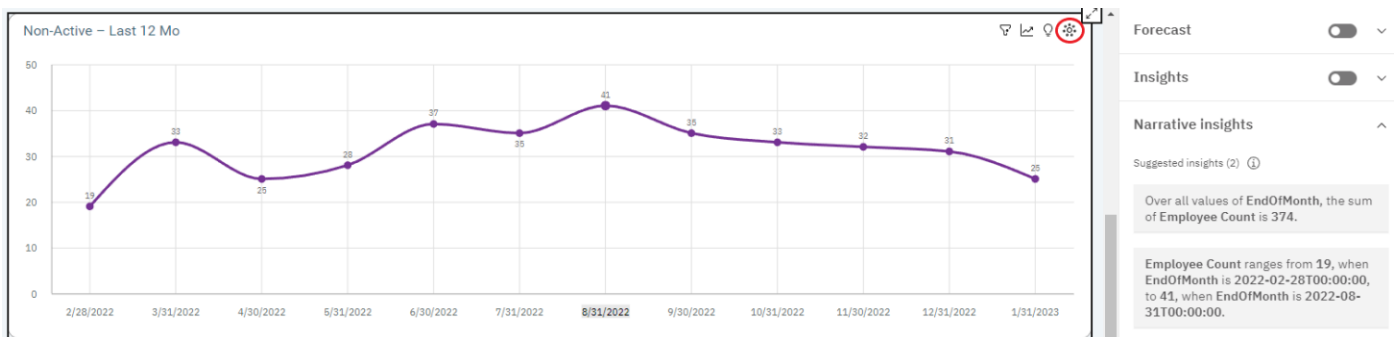
Insights

To see further insights into the data, such as average values, select the Insights icon .



Narrative Insights

To view textual descriptions of highlights in the data, select a visualization and then select the Narrative insights icon .



Set a dashboard as your Manager Services home page

You have the ability to set a dashboard as your Manager Services home page.

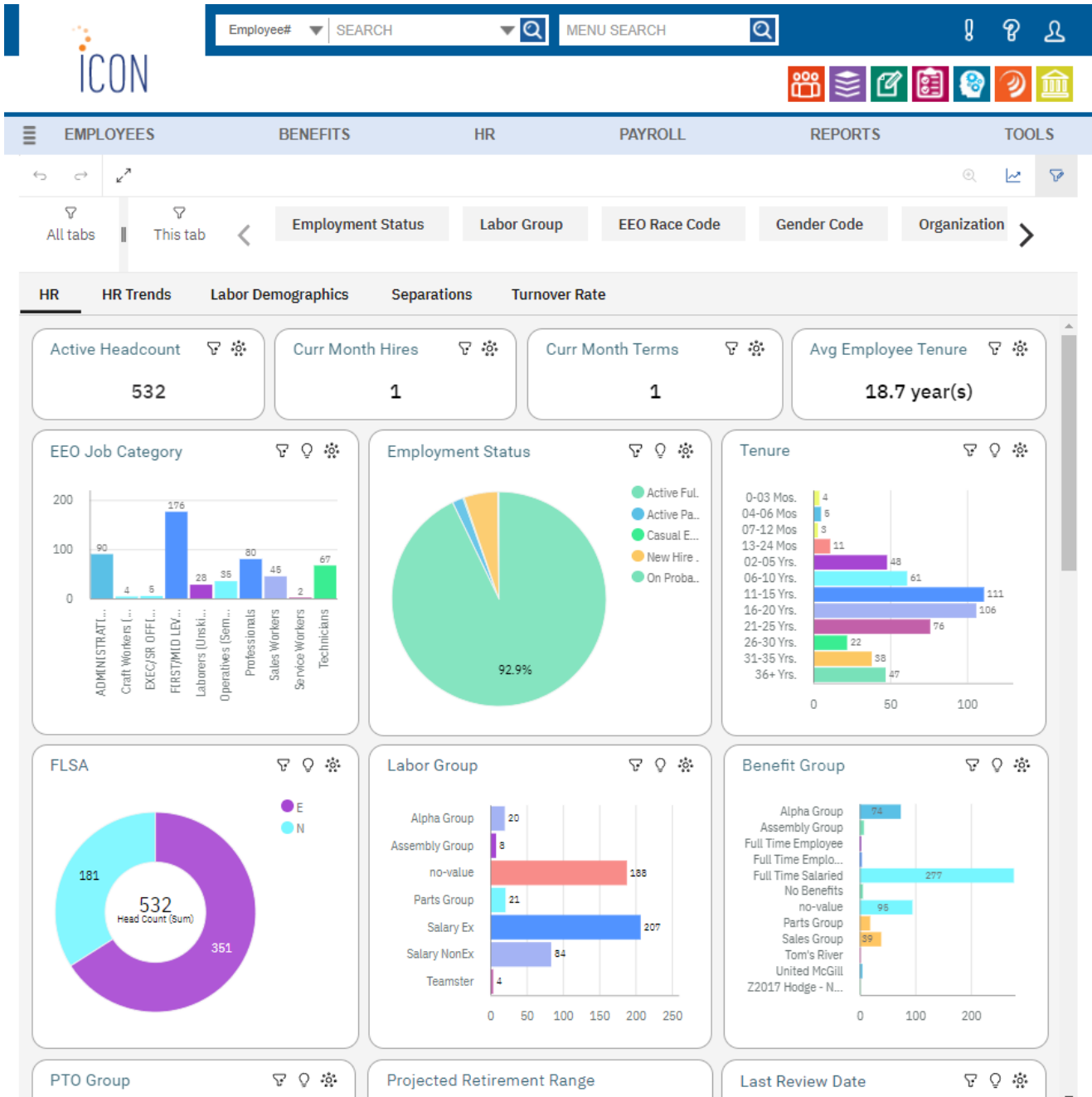
Go to Manager Services “My Account” page. Under Preferences > Home Page, select the name of the Dashboard you want as your home page.

My Account

Password:	
New Password:	<input type="text"/> (case-sensitive)
Re-Enter New Password:	<input type="text"/> (case-sensitive)
Recovery:	
Current Recovery Question:	What is your Mother's Maiden Name?
Change Recovery Question:	[Select a question or enter your own below] <input type="text"/>
Change Recovery Answer:	<input type="text"/>
E-mail:	
Current E-mail Address:	
Change E-mail Address:	<input type="text"/>
Re-Enter E-mail Address:	<input type="text"/>
Preferences:	
Home Page:	Standard Dashboards>HR Dashboard <input type="text"/>
Employee Search Default:	*Default Page
My Employees Default:	*My Employees
Workflow Notification Election:	Standard Dashboards>Benefits Dashboard
Payroll Report Distribution Delivery:	Standard Dashboards>HR Dashboard
<input type="checkbox"/> Open Workforce Management with Home Page	Standard Dashboards>Payroll Dashboard by Check Date
	Standard Dashboards>Payroll Dashboard by Pay Ending Date
	Standard Dashboards>Salary Dashboard

**Note: You don't have to wait for the dashboard to finish loading before using other parts of Manager Services.

HR Dashboard as the Manager Services home page:



Sharing dashboards

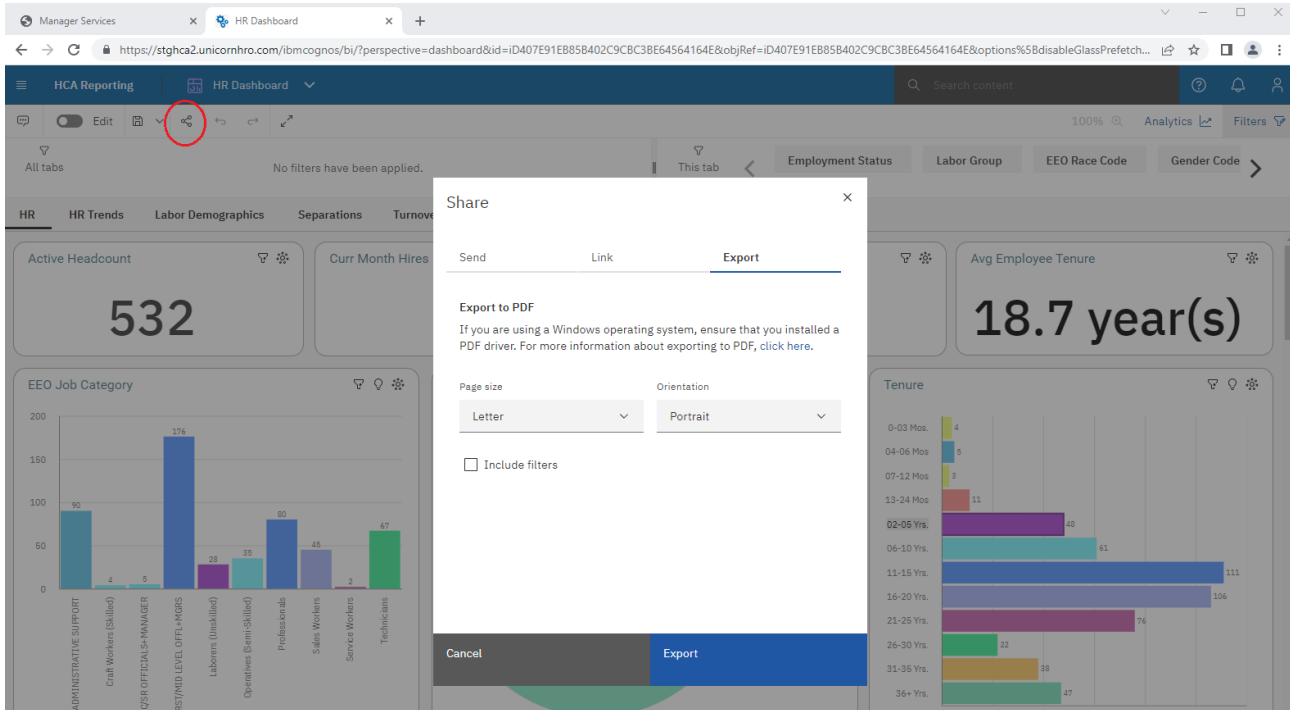
In order to share a dashboard via email or export it to a PDF, the dashboard must be run in HCA Reporting. It can't be done from the Manager Services home page.

Open the dashboard in HCA Reporting, expand the Share menu.

To export to PDF choose the Export tab

To include a picture of the dashboard in an email, choose the Send tab.

PDF:



Email:

