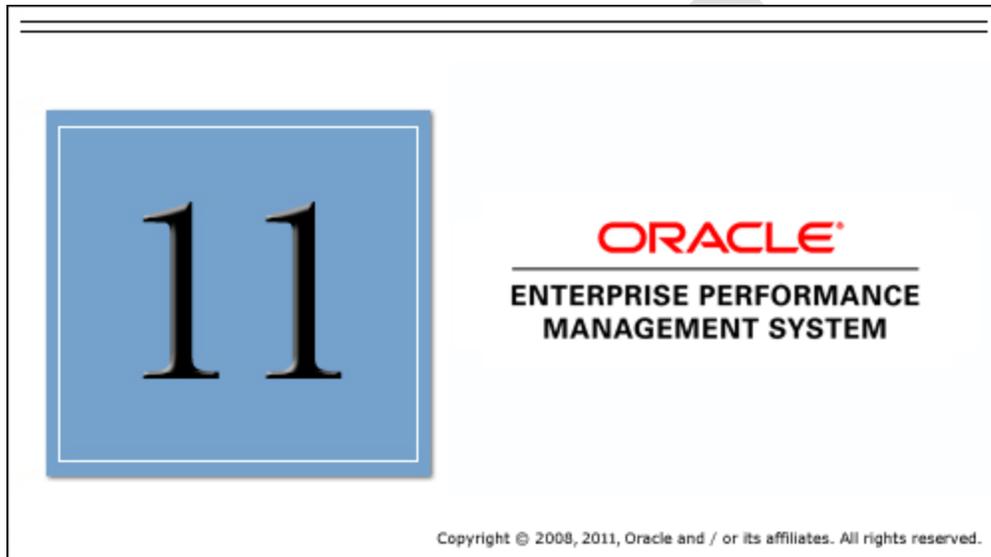


ORACLE HYPERION 11 - AUTOMATED USERS GUIDE – REPORT OVERVIEW



Welcome to EEOC Business Intelligence Server - Production (EPM 11.1.2.1)

APRIL 30, 2014

**AUTHOR:
CALVIN LOVING
OFFICE OF FIELD PROGRAMS**

TABLE OF CONTENTS

OVERVIEW.....	2
PRIVATE SECTOR REPORTS.....	2
ENFORCEMENT REPORTS.....	2
PS FY2014 AGED INVENTORY REPORT.....	2
PS FY2014 DISTRICT PENDING INVENTORY REPORT – “TO BE RETIRED” (EFFECTIVE 5/4/14).....	3
PS FY2014 DISTRICT PENDING REPORT – SEP & DCP – “UPDATED”	3
PS FY2014 OFFICE PENDING INVENTORY REPORT – “TO BE RETIRED” (EFFECTIVE 5/4/14) ...	3
PS OFFICE PENDING INVENTORY REPORT – SEP & DCP – “NEW”	3
PS F2014 DISTRICT RESOLUTIONS REPORT – “TO BE RETIRED” (EFFECTIVE 5/4/14)	4
PS FY2014 DISTRICT RESOLUTIONS REPORT – SEP & DCP	4
PS FY2014 OFFICE RESOLUTIONS REPORT	5
SEP-DCP SUBMISSION REPORT.....	5
PS FY2014 STAFF ACTIVITY REPORT	5
PRIVATE SECTOR ADR REPORTS.....	6
PS 2014 ADR PENDING INVENTORY REPORT – “TO BE RETIRED” (EFFECTIVE 5/4/14)	6
PS ADR PENDING INVENTORY REPORT – SEP & DCP “NEW”	6
PS FY2014 MEDIATION WORKLOAD REPORT	6
PS FY2014 OFFICE ADR RESOLUTIONS REPORT	7
FEDERAL HEARINGS REPORTS.....	8
FH FY2014 DISTRICT PENDING REPORT.....	8
FH FY2014 OFFICE PENDING REPORT.....	8
FH FY2014 DISTRICT RESOLUTIONS REPORT	8
FH FY2014 OFFICE RESOLUTIONS REPORT	9

OVERVIEW

This guide is designed to provide an overview of each report, illustrate what data or calculations each report contains, as well as, how the report breaks down the data into the various tables or pivots. The review is ordered by Private Sector Enforcement, ADR and Federal Hearings. As new or current reports are:

- Released, they will be added in and annotated with the “**New**” indicator
- Updated, they will be added in and annotated with the “**Updated**” indicator
- Replaced with new versions, there will be a “**To Be Retired**” indication with the date of effective retirement.

Note: *All reports within the Hyperion 11 Automated portal are built from a single template that incorporates all resolutions, pending or receipts reports in the Integrated Mission System, and provides additional information that was requested through ad hoc reports or by users of the automated reports. Some reports will be incorporated within another report that makes sense, thus reducing maintenance and total required queries.*

PRIVATE SECTOR REPORTS

Private Sector Report naming convention begins with the “PS” designation so that all PS reports are ordered together for ease of locating the report you desire.

ENFORCEMENT REPORTS

PS FY2014 AGED INVENTORY REPORT

This report provides counts and details for aged charges pending and aged charge resolutions. Aged are charges which were in your district inventory before July 31 of the previous fiscal year and still open on October 1 of the current fiscal year, making them at least 426 days old.

Report provides:

- Aged Inventory Total
- Aged Inventory Closures
- Aged Inventory Pending

These counts are broken by district, office, and office & staff. The report also provides aged inventory exclusions, which are currently:

- Conciliation Exclusions – Subtracts days in conciliation from aged pending charges age calculation that may cause the charge to not exceed 426 days.
- Second Half Transfers – Excludes pending charges from aged count that were transferred into the district on or after April 1 of the fiscal year.
- AY Exclusions – Charge is PCAT “AY”, open and older than 426 days.
- Systemic Plan Exclusions – Excludes pending charges from aged count that were transferred into and current reside in the Systemic function for processing.

These exclusions are totaled for the purpose of assisting district goal calculation where this total can be subtracted from the Aged Inventory pending year end count. The total exclusions are provided for district and by office.

PS FY2014 DISTRICT PENDING INVENTORY REPORT – “TO BE RETIRED” (EFFECTIVE 5/4/14)

- Replaced by the **PS FY2014 District Pending Report – SEP & DCP**

PS FY2014 DISTRICT PENDING REPORT – SEP & DCP – “UPDATED”

This report provides the current count and breakdown of a districts pending charge inventory, broken out by office with district totals. The report contains a result set containing charge particular details, as well as, seven pivot tables as follows:

- District Pending Totals – Breaks out total pending counts by Office with District Totals. Contains: detailed counts of all Processing Category (PCAT) Codes (including No PCAT); PCAT % counts for A's, B's and C's; counts and percentage of With Cause cases; counts and percentage of Onsites conducted; counts and percentage of Fact Findings conducted; Averages of Charge, Office and Staff age; and count of Aged pending (age equal to or greater than 426 days).
- District Statute Summary – By office with district totals for statutes and statutes combinations.
- District Source of Complaint Breakout - By office with district totals for defined sources of pending charges.
- District Communication Type Breakout - By office with district totals on how the charge was received or communication type used by charging party.
- District employer Type Breakout - By office with district totals for types of employers cited in pending charges.
- District National Origin Breakout - By office with district totals data detailing the national origin of the charging parties for the pending inventory.
- District NAICS Breakout - By office with district totals for North American Industry Classification Codes cited in the Respondent data for pending inventory.
- A table has been provided , which contains details on SEP, DCP or Topic items selected for pending inventory. If one or more SEP items were selected for this charge they will be listed in the SEP IDs column of the table. The same applies for DCP IDs and Topic IDs columns.
- Also pivots were added to detail for each office by count and by Processing Category which SEP, DCP or Topic IDs have been used.

PS FY2014 OFFICE PENDING INVENTORY REPORT – “TO BE RETIRED” (EFFECTIVE 5/4/14)

- Replaced by the **PS Office Pending Inventory Report – SEP & DCP**

PS OFFICE PENDING INVENTORY REPORT – SEP & DCP – “NEW”

This office focused report provides the same data, pivots and tables as detailed in the **PS FY2014 District Pending Report – SEP & DCP**, with the following additions:

- Detailed functional breakout has been redesigned so that sections for ADR (All Function B), Enforcement (All Functions E & S) and Intake (All Functions I & Z) are compressed. Each section details function unit and staff data but displays it in a combined area for ease of location for managers and supervisors.

- A new Table at the bottom of “Sections”, show Charges without EEO1 Connection. These are charges with employee size of 150 or higher that have no EEO1 HQ or Unit Number in the data.
- The **IMS Inventory Review Report (“New”)** has been incorporated into the Office Pending Inventory report to maximize use of the main query and data retrieved. Individual reports are segregated for ADR, Enforcement and Intake using the function groups indicated in the bullet above. The report provides the same fields and additional columns users have requested for the IMS report it replaces. This report should always be exported using the “Export to Excel (.mhtml)” button in the toolbar. This will provide you with a spreadsheet report and with all formatting saved. Additional columns can be added if requested.

PS F2014 DISTRICT RESOLUTIONS REPORT – “TO BE RETIRED” (EFFECTIVE 5/4/14)

- Replaced by the **PS District Resolutions Report – SEP & DCP**

PS FY2014 DISTRICT RESOLUTIONS REPORT – SEP & DCP

This report provides the current and last fiscal year count and breakdown of a districts charge resolutions, broken out by office with district totals. The report contains a result set containing charge particular details, as well as, ten pivot tables as follows:

- District Tally by Office by Function – Office and district resolutions broken out by closure function.
- District Resolutions Summary – Office and district resolutions broken out by closure, such as:
 - Settlements, Withdrawal With Benefits; Successful Conciliations; Unsuccessful Conciliations; Merit Factor Resolutions with Percentage; No Cause; Administration Resolutions with Percentage; Targeted Equitable Relief (TER) Charges; Total Benefit Dollars; Total Benefit Individuals; With Cause with Percentage; Onsite with Percentage; Averages of Staff, Charge and Office Age.
- District Disposition by Statute – District tally of statute groups by type of closure.
- District Individual Benefits by Statute – District tally of benefit statistics by statute groups.
- District Resolutions Summary Overall – This pivot show the same Resolutions Summary, as described above, by fiscal year for the entire district.
- District PCAT Stats – This pivot shows district resolution totals by their respective processing category code for current and last fiscal year.
- Quarterly District Tally by Office by Function – This pivot shows the data from the District Tally by Office by Function, described above, by fiscal quarter and month breaks.
- District Resolutions Staff Summary – This pivot shows the data from the District Resolutions Summary, but includes breaks by staff, fiscal quarter and month. This pivot can show how staff resolutions compare from last to current fiscal year. All columns in the pivot are identical to the District Resolutions Summary.
- Current FY Resolutions Staff Summary – This pivot takes the District Resolutions Summary and adds office staff to show individual accomplishment by the

categories of closures or pertinent other information. All columns in the pivot are identical to the District Resolutions Summary.

- In the Summary pivots, a count of M4 closures with Targeted Equitable Relief (TER) with percentage was added as this is a district goal item.
- An additional table, SEP & DCP Results, has been provided following the District Pivots, which contains details on SEP, DCP or Topic items selected for resolutions. If one or more SEP items were selected for this charge they will be listed in the SEP IDs column of the table. The same applies for DCP IDs and Topic IDs columns.
- Also a pivot was added to detail for each office by Closure Code which SEP, DCP or Topic IDs have been used.
- *Additional pivots can be added based on feedback from district offices.*

PS FY2014 OFFICE RESOLUTIONS REPORT

This report, though from each office within the district's perspective, provides the same data, pivots and tables as detailed in the PS FY2014 District Resolutions Report above, with the following addition:

- Functional breakout with total by function, unit and staff for Enforcement, Intake and Systemic. ADR resolutions are not detailed in this report but done separately as detailed below.

SEP-DCP SUBMISSION REPORT

This report, in support of district quarterly submission of SEP resolutions, was designed to provide each district specific SEP data broken by quarter, by ADR and Enforcement (closure function), by closure type and closure office. The report then provides details for every M1, M2 or M4 closure, as follows:

- Closure Office, Charge Number, Case Name, Total Monetary Benefits, SEP designations, Statutes, Basis, Issues and Targeted Equitable Relief Benefit Types. This output can be exported to excel using the "Export to Excel (.mhtml)" button in the toolbar.
- Districts can then assess which charges they will submit to HQ for the quarterly submissions. Only one field on the submission template was not included in this data set, "Brief description of the case", which is not in IMS.

PS FY2014 STAFF ACTIVITY REPORT

This report provides district, office, function and staff activity totals for various charge actions by current fiscal month, quarter and year with totals for each item, as follows:

- Fact Finding; Onsite; Cause Finding; Withdrawal With Benefit, Settlement, Conciliation and Failed Conciliation Closures; Merit Factor totals; No Cause; Total Admin Closures; Total Closures; and Failed Mediation (Impasse).
- These items are continually updated throughout the fiscal year and can be used as a reference for staff activity.

PRIVATE SECTOR ADR REPORTS

PS FY2014 ADR PENDING INVENTORY REPORT – “TO BE RETIRED” (EFFECTIVE 5/4/14)

- Replaced by the **PS ADR Pending Inventory Report – SEP & DCP**

PS ADR PENDING INVENTORY REPORT – SEP & DCP “NEW”

Although Office Pending ADR information is included in each office report, this report is run for the entire district to provide the ADR coordinator a single report that breaks out office data. The “New” report provides the identical data, pivots and tables as detailed in the **PS Office Pending Inventory Report – SEP & DCP** and it provides the “New” Inventory Review Report in this version as well.

PS FY2014 MEDIATION WORKLOAD REPORT

This report is really two reports in one, offering district, office and mediator tallies and statistics for Mediations Held and Mediation Offers. Data provided is as follows:

- Mediations Held
 - District tallies and statistics for:
 - Mediations Held
 - Successful Mediations
 - Success Rate
 - Average Closure Age
 - Total Benefit Amounts
 - Average Dollars of Benefits
 - Total Persons Benefitted
 - Nonmonetary Benefit Total.
 - District Tallies are further broken by mediation staff types providing statistics for these areas only;
 - Successful Mediations
 - Mediations Held
 - Success Rates
 - District Tallies mentioned in sub-bullet one are also broken out by mediation staff types.
 - Office results are individually broken out for:
 - Mediations Held
 - Successful Mediations
 - Processing Time
 - Success Rate
 - Office results are broken by staff where results occurred.
 - Staff results overall are broken out across the district.
- Mediation Offers
 - District tallies and statistics are provided for:
 - Offers to CP
 - Accepted Offers to CP
 - CP Acceptance Rate
 - Offers to Respondent
 - Accepted Offers to Respondent

- Respondent Acceptance Rate
 - Above items are then broken by offices within the district
 - Above items are then broken by offices and staff within the district
 - Above items are then broken by staff within the district

PS FY2014 OFFICE ADR RESOLUTIONS REPORT

This report provides the same data, pivots and tables as detailed for the PS FY2014 Office Resolutions Report, but this report only contains ADR data broken by district, office, function/unit and staff.

DRAFT

FEDERAL HEARINGS REPORTS

FH FY2014 DISTRICT PENDING REPORT

This report provides the current count and breakdown of a districts pending hearing (complaint) inventory, broken out by office with district totals. The report contains a result set containing hearing particular details, as well as, four pivot tables as follows:

- Pending Counts by Office – Provides hearing counts for the following by office with district totals:
 - Total Pending
 - Transfers In
 - 180 Day count
 - 360 Day count
 - Average Case Age
 - Average Office Age
 - Average Staff Age
 - Number of Consolidations
 - Number of Amendments
 - Total Complaints with Basis of Retaliation
- Pending Cases by Statute – Provides statute statistics for pending hearings by Statute Groups
- Pending Counts by Office/Staff – Provides the same data columns from bullet 1 above, but broken by assigned staff.
- Pending Cases by Statute/Staff – Provides the same data columns from bullet 2 above, but broken by assigned staff.

FH FY2014 OFFICE PENDING REPORT

This report is modeled after the District report but is run for each office within the district that maintains a hearing function. All pivots are identical in style to those described in the FH FY2014 District Pending Report.

FH FY2014 DISTRICT RESOLUTIONS REPORT

This report provides the current and last fiscal year count and breakdown of a districts hearing resolutions, broken out by office with district totals. The report contains a result set containing hearing particular details, as well as, five pivot tables as follows:

- Resolutions Summary – Provides hearing counts for the following by office with district totals:
 - Total Resolutions
 - Total Consolidations
 - Total Resolutions with Consolidations
 - Total Settlements
 - Total Withdrawal with Benefits
 - Total Hearing Discrimination
 - Total No Discrimination
 - Total Merit Resolutions with percentage
 - Total Admin Resolutions with percentage
 - Total Benefit Dollars
 - Total Benefitted Individuals

- Average AJ Age
- Average Complaint Age
- Average Office Age
- Average Processing Time
- Resolution Statute Summary – District tally of statute groups by type of closure.
- Resolutions Benefit Summary – District tally of benefit statistics by statute groups.
- Resolutions With Decisions – District tally of closures with decisions by closure type codes.
- Resolutions Without Decisions – District tally of closures with no decisions by closure type codes.

FH FY2014 OFFICE RESOLUTIONS REPORT

- This report is designed exactly as the FH FY2014 District Resolutions Report is, with the exception that each of the five pivots above is also shown with a break by closure staff.

FH FY2014 SEP & FCP REPORT – “NEW”

This report is in draft form and still yet to be fully finalized more to come on this report.