O|BI (Online Business Intelligence) User Guide

for MIT DLC Leave Contacts Only

Accessibility statement:

MIT is committed to providing an environment that is accessible and inclusive for individuals with disabilities. If you need a disability-related accommodation to access these materials, please email hr-dsmlo@mit.edu or call 617-253-4272.

Table of Contents

ACCESS AND SECURITY **3**

TOUCHSTONE/SINGLE-SIGN ON (SSO) ACCESS 3

NAVIGATING INSIDE THE STANDARD SUITE **4**

STANDARD SUITE REPORT DESCRIPTIONS 4

RIGHT NAVIGATION BAR FEATURES 4

TIPS, TRICKS, AND EFFICIENCIES **5**

APPENDIX **8**

INDIVIDUAL SEARCH 8

CREATING AND SAVING A CUSTOM REPORT 9

OTHER FEATURES 10

REPORTING DATA DICTIONARY: LEAVE INVENTORY REPORT 10

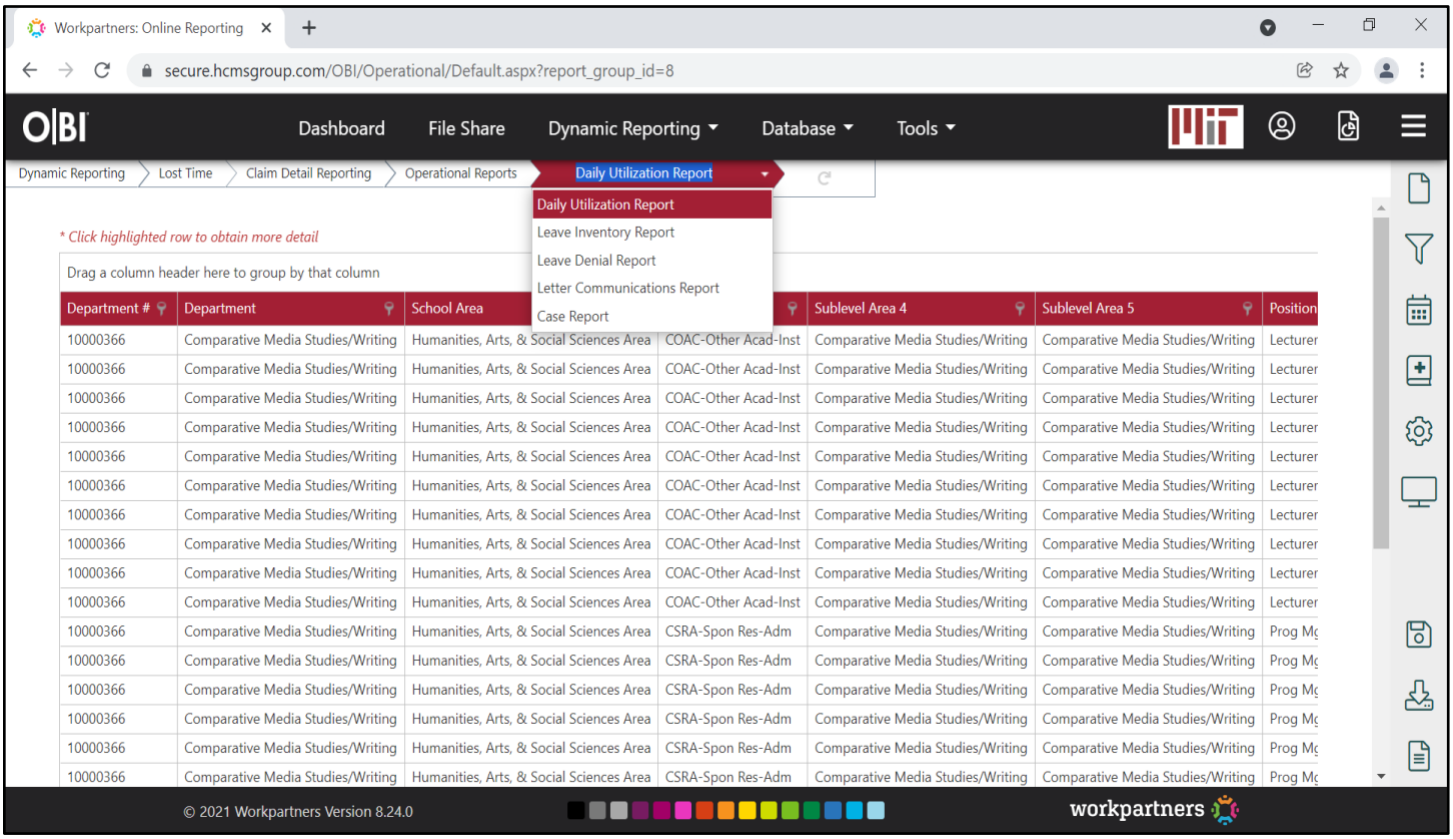
REPORTING DATA DICTIONARY: LEAVE DENIAL REPORT 12

REPORTING DATA DICTIONARY: DAILY UTILIZATION REPORT 13

Access and Security

The Online Business Intelligence system (O|BI) uses a single sign on (SSO) security feature to allow the user ("you") to navigate seamlessly to the O|BI Portal Login. MIT Touchstone and Duo authentication are required for access.

After you have authenticated using MIT's Single Sign On (SSO), you will be directed to your default landing page. For most users, this will be the Operational Reports page. From there, you can easily navigate to your desired reporting using the dropdown function.



Navigating Inside the Standard Suite

Once in the desired report, you can edit and customize as needed.

Standard Suite Report Descriptions

Report Groupings	
Operational Reports	Reporting used to help understand open, closed, and pending leaves of absence. • **Leave Inventory Report** – status of all leaves across custom demographic file breakouts, including approved, denied, and pending leaves. • **Leave Denial Report** – employee-level view of all denied leaves with a reason for the denial. • **Daily Utilization Report** – day-level view of absences. Includes time missed and date missed. • **Case-Level Report** – case-level view of high-level details for an employee's case status.
Individual Search	Complete listing and analysis of an individual employee's leave history. See appendix for a more detailed description.

Right Navigation Bar Features

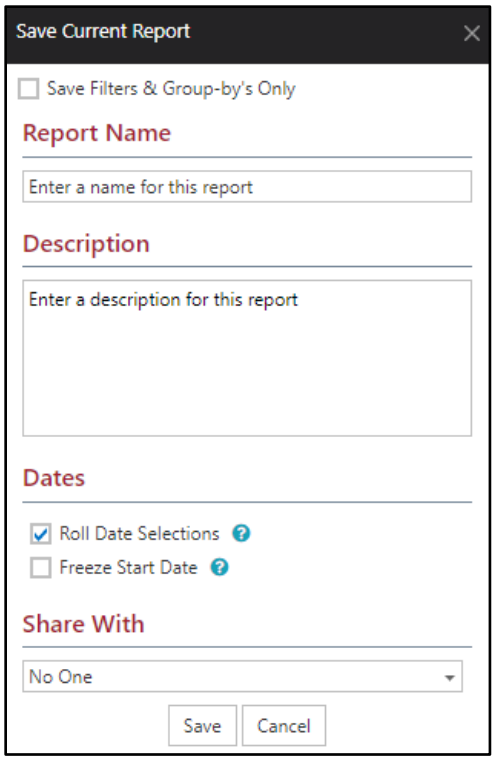
You can use the right navigation bar with any operational report.

Right-Side Navigation Features		
Reports		Use to navigate to each individual report. The dropdown menu includes all available operational reports.
Filters and Group-Bys		Tailor report output by key **employer** and **employee** attributes. Includes standard and custom options by client, driven by the demographic file sent to Workpartners.
Date Range		Customize output by specific date ranges. Multiple date-type options are available for reports (open, date missed, start date, etc.).
Claims-Based Filters		Tailor report output by key **case** and/or **policy** attributes.
Options		Add and remove reporting fields from the current report. This feature is especially helpful when creating a custom report to be saved or distributed.
Report Layout		Add in subtotals and grand totals (where applicable). Edit chart type (where applicable).

Save Report		Save a custom report for future use or distribution with other users. See **Appendix** for a walkthrough of this function.
Export Report		Export a custom report to an Excel file.
Report Parameters		Displays all user-applied restrictions chosen for the current report.

Tips, Tricks, and Efficiencies

- **Freeze Date Selection vs. Roll Date Selections** – To create a custom report showing month-to-date data, select a start date and end date, save the report, and select **Freeze Start Date**. When you later login into the O|BI, your originally selected start date will be saved, but the end date will have moved forward each day. When the next month comes around, you can adjust the start date for your report and re-save to look at the monthly data with the updated start date. **Roll Date Selection** moves the start **and** end dates forward each time the data is updated, which is daily.



- **FTE Entitlement Detail** – The Leave Inventory operational report includes an FTE column, reflecting the employee's Full Time Equivalent. If an employee is working fewer than 40 hours/week, their FTE

will be reflected accordingly in an increment less than 100. FTE data will also impact an employee's leave entitlement. Another data column is Hours Used/Hours Available. These hours are unique to an employee's FTE. *Example: An employee with 100% FTE would have 480 hours (12 weeks) of entitlement for FMLA. If the employee has a lower FTE, their entitlement would be less than 480 hours (12 weeks).*

- **LWOP/Denial Report** – The Leave Denial operational report includes a Denial Reason column, which can be filtered by the Denial Reason. LWOP (Leave Without Pay) is a filterable Denial Reason that provides insight into an employee's denial status for LWOP.

- **Drag/Drop Function for Column Headers** – In reviewing any operational report, you can drag/drop any column header to filter details unique to that column.



As you can see in the screenshot above, column headers can be dragged/dropped to filter for a specific element. Below, the column header for "Department" has been dragged for filtering. This action can be completed for multiple column headers. You can also rearrange the column order.



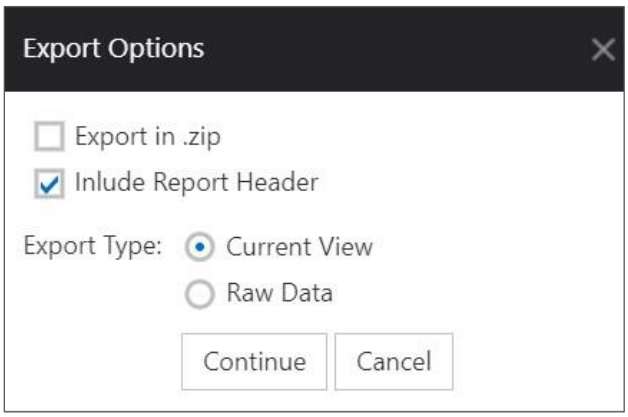
- **Intermittent Time Review** – To review all of an employee's intermittent occurrences and time reported, use the Daily Utilization operational report, which provides a daily breakdown of all time used in the Date Missed and Hours Missed columns.

- **Case-Level Report** – This report is limited to provide one row item per case number. If an employee has multiple cases they could have multiple rows, depending on the report parameters. If the current case status is "Open" and that time has passed consistent with the case period, the case will **not** show up on the report.

- **Login/Logout** – As a security measure, after 30 minutes of inactivity you will be logged out of the O|BI. If this occurs, login again through the O|BI Portal Login and re-authenticate through SSO. Do not attempt to enter your login detail through any other page.

- **Help/IT Support** – For authorization issues or questions about the application, please contact the MIT Disabilities and Medical Leaves Office at hr-dsmlo@mit.edu or 617-253-4272.

- **Exporting** – Per the screenshot below, there are several options for report exports, such as whether to have a report header. A report header provides the specified reporting parameters, but it can pose formatting challenges in Excel. Excluding the report header may make your reviewing/editing of the exported report easier.



Appendix

Individual Search

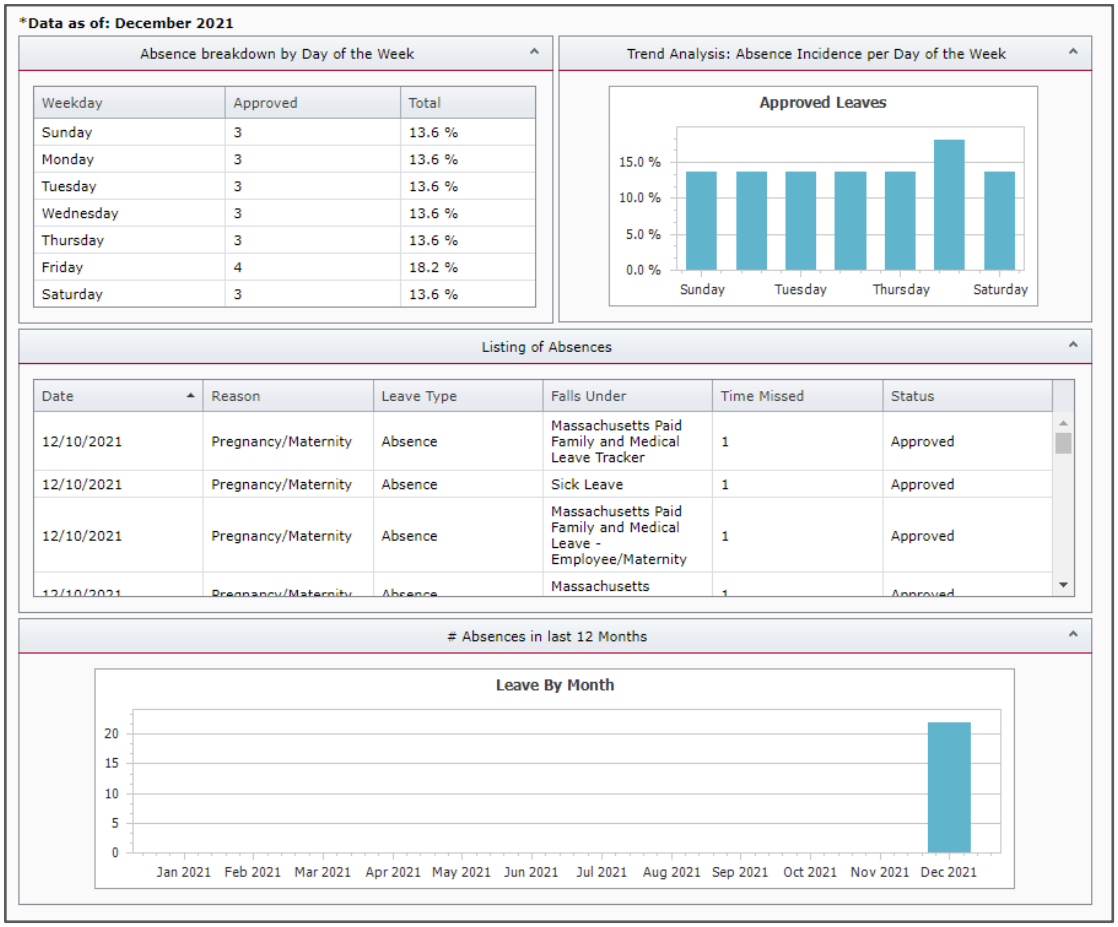
The Individual Search drill-down dashboard shows details pertaining to a single employee's absence history. This report also includes demographic information. To launch the Individual Search, left-click on any part of a row in one of the three operational reports (Leave Inventory, Leave Denial, or Daily Utilization).

Information Available in the Individual Search

- Employee demographics
- Absence breakdown by day of the week (table and graph)
- Listing of absences
- Absences by month (for the past 12 months)

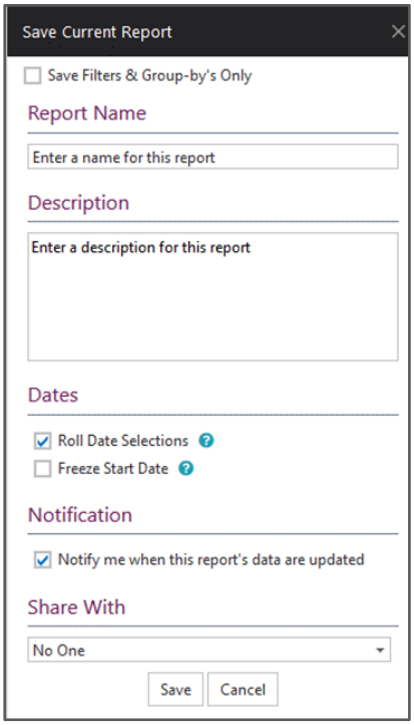
Individual Search Functionality

- In the Leave by Month graph at the bottom of the page, left-clicking a specific month will update all the data points above it for that month.
- All individual analyses can be collapsed to make a smaller view in the browser window.
- To exit the Individual Search, click anywhere outside of the pop-up window.



Creating and Saving a Custom Report

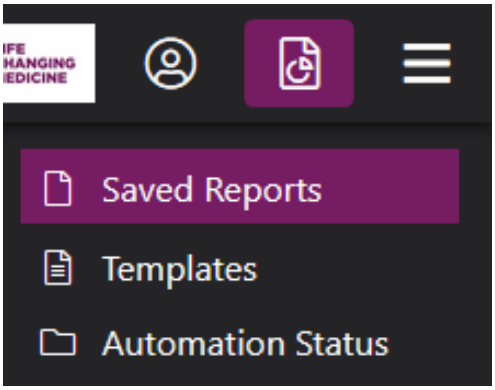
Standard operational reports provided by Workpartners can be customized and saved both for future use or to share with other registered users. Once a report is saved, it will be in the top right corner of your browser with an icon that looks like a blank page. If you hover over that icon, you'll see that it is called "Saved Reports." See Appendix for more information on this icon.



Pictured to the left is what will pop up when you click on the "Save Report" button from the right navigation bar. From here, you can add specifications for your custom report:

1. Name
2. Description
3. Dates functionality
    a. Roll Date – the start and end dates you add will each move forward every time the O|BI data refreshes (which is daily).
    b. Freeze Start Date – the start date you selected will not move. The end date will move forward every time the O|BI data refreshes (which is daily).
4. Notification
    a. If this is checked, you will receive an email every time the O|BI data refreshes (which is daily). This indicates that your custom report has been updated; click the link in the email to be directed to the O|BI. If this is unchecked, you will not receive notifications, but the report will continue to be updated.
5. Share With
    a. Share your custom report with other registered O|BI users within your organization. The other user(s) will receive an email that the report is being shared with them; they can navigate to the O|BI by clicking on the link within the email.

Other Features

Feature	Description	
Filter Lock	Located in the bottom corner of the Filters & Group-Bys menu and unlocked by default. This feature allows you to apply group by and filter options to your report.	
Saved Reports	Located in the upper right corner, reports created or shared using the "Save Report" functionality will appear here. You can run any saved report from this location, as well as update any custom report specifications.	
Templates	You can set up prebuilt reports that update based on the data refresh. Templates are available to all users.	
Automation Status	Displays information regarding any automated reporting processes you set up. It's located under the same Saved Reports Menu.	

Reporting Data Dictionary: Leave Inventory Report

A report showing the status of cases open during a specified period. Includes policy start/end dates, return-to-work dates, case types, and utilization.

Report Specifications:

- *Default Date Range = Current Month-to-Date*
- *Default Claims Based Filters:*
  - *Approved, denied, pending, and canceled*
  - *Continuous and intermittent*
  - *All Workpartners managed leave policies*
  - *All leave reasons*
  - *Only open cases*

Field Name	Data Example	Field Description
Employee ID	1212540	Employee ID
First Name	John	Employee first name
Last Name	Smith	Employee last name
Supervisor Name	Jane Doe	Employee supervisor name
Case Number	123456	Unique case number assigned
Leave Policy	FMLA	Policy designation for case
Leave Type	Intermittent	Type of case (continuous/intermittent)
Intermittent Absence Type	Incapacity	Office visit or incapacity
Reason	Family Health Condition	Reason employee is using benefit
Start Date	6/17/2019	First absence date of case
End Date	9/16/2020	Date the case ends
Claim Status	Approved	Case status (approved/denied/pending/canceled)
Open/Closed	Open	Open or closed indicator
Estimated RTW Date	9/17/2020	Date on which employee plans to return to work
Return-to-Work Date	9/17/2020	Date on which employee does return to work
Frequency	1 event per 1 month	Allotted frequency on medical cert
Duration	3 days per event	Allotted duration on medical cert
Policy Start Date	6/17/2019	Start date of policy
Policy End Date	6/16/2020	End date of policy
Days Available	18.9	Days available (12-month lookback)
Days Used	41.1	Days used (12-month lookback)
Weeks Available	5.6	Weeks available (12-month lookback)
Weeks Used	6.4	Weeks used (12-month lookback)

MA-PFML

- *Within the Leave Inventory report, the Massachusetts Paid Family Medical Leave (PFML) policy is broken out into various, specific policy types. This is due to the unique interplay of the 26-week entitlement of this policy as it pertains to the reason for absence. Policy details, reason, and specified entitlement are:*

Policy Name	Entitlement	Reason for Leave
MA-PFML1	20 weeks	Employee Health/Pregnancy
MA-PFML2	12 weeks	Family/Bonding/Adoption/Foster/Exigency
MA-PFML3	26 weeks	Care for Injured Servicemember
MA-PFMLTRACK	26 weeks	

Please note: An eligible employee is only able to use 26 weeks of total entitlement in a rolling calendar year. These policies are strictly for tracking purposes to ensure accurate processing given the variety of applicable leave reasons.

Reporting Data Dictionary: Leave Denial Report

Employee-level view of all denied cases, with denial reason detail.

Report Specifications:

- *Default Date Range = Rolling 12 months*
- *Default Claims Based Filters*
    - *Only denied cases*

Field Name	Data Example	Field Description
Employee ID	1212540	Employee ID
First Name	John	Employee first name
Last Name	Smith	Employee last name
Supervisor Name	Jane Doe	Employee's supervisor name
Case Number	123456	Unique case number assigned
Leave Policy	FMLA	Policy designation for case
Reason	Family Health Condition	Reason employee is using benefit
Leave Type	Intermittent	Type of case (continuous/intermittent)
Request Date	6/1/2019	Date employee requested case
First Absence Date	6/17/2019	First absence date of case
Last Absence Date	11/15/2019	Most recent date employee was on leave
Work State	NY	Employee work state
Denial Reason	Paperwork Not Received	Reason for case to be denied

Reporting Data Dictionary: Daily Utilization Report

Daily view of current absence activity and time missed. Report includes approved, denied, and pending cases.

Report Specifications:

- *Default Date Range = One week*
- *Default Claims Based Filters:*
  - *All open*
  - *All approved*

Field Name	Data Example	Field Description
Employee ID	1212540	Employee ID
First Name	John	Employee first name
Last Name	Smith	Employee last name
Case Number	123456	Unique case number assigned
Open/Closed	Open	Open or closed indicator
Intermittent Absence Type	Incapacity	Office visit or incapacity
Claim Status	Approved	Case status (approved/denied/pending/canceled)
Leave Type	Intermittent	Type of case (continuous/intermittent)
Reason	Family Health Condition	Reason employee is using benefit
Date Missed	6/17/2019	Date employee was absent
Time Missed	8.00	Amount of time taken on specified date missed