Human Capital Reflection®

Version 1.0

Human Capital Logistics Inc.

Human Capital Logistics, Inc. 3322 Sturbridge Lane Sugar Land, Texas 77479-2223

Phone (281) 265-3004 - Toll Free (888) 494-9019 - Fax (281) 265-3006

http://www.humancapitallogistics.com/

sales@humancapitallogistics.com

Table of Contents

Introduction

The **Human Capital Reflection®** service helps your company make important decisions using the information provided by the reports.

This service can help you,

- Decide when to initiate personnel hiring freezes.
- Decide when to train specialty personnel replacements.
- Identify where high turnover personnel exist that might be increasing costs.

The **Human Capital Reflection®** service provides access to your own, private website. Your specialized website allows you to view and download reports based on the information you provided to Human Capital Logistics.

The four major report types:

- Gap report – Shows how many open positions the company will have based on the projected turnover and fill rate.
- Fill rate – Shows how many people the company will hire based on data supplied.
- Retirement – Shows how many positions will open due to retirement based on age.
- Turnover – Shows how many employees the company will lose based on internal hiring, firing, retirement, etc.

Each of these reports can help you build and understand the problem or well managed areas of your company.

Logging Into Human Capital Reflection

1. In the address bar of your Internet browser, type your personalized company url.

   (Example: **yourcompanyname**.humancapitallogistics.com)

   The company login page for your personalized website appears.

2. In the **Login** area, do the following:

   a. In the **Username** box, type your user ID name. Human Capital Logistics will provide you with the Username you specified.

   > **Note** Human Capital Logistics will provide the Username and password for your company website that you specified. Check your email for this information.

   b. In the **Password** box, type your password

   c. Click **Login**.

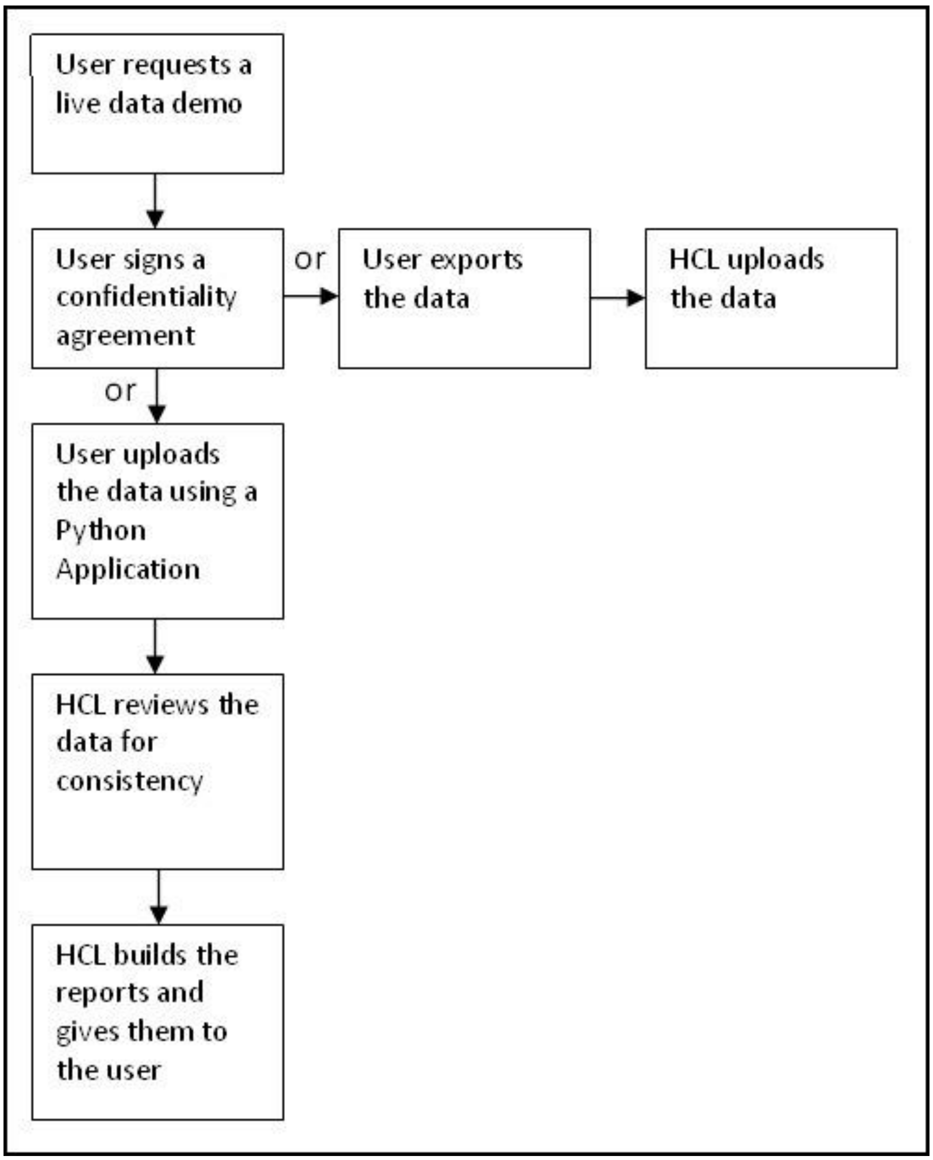
Data Collection

Human Capital Reflection® uses your company's data to run reports and analyze the current human resource trends within your company and predict potential human capital problems. To use **Human Capital Reflection®** Human Capital Logistics (HCL) needs to collect your existing human resource data.

If an HCL employee, or your HR manager, has already collected the human resource data, you do not need to perform this operation. If you are trying to update your quarterly data, please contact your HCL Sales representative to receive update instructions.

The following flow chart shows the simplified process for collecting data. Please contact your sales representative for detailed instructions.

Note In the following flow chart **Human Capital Logistics** is shown as **HCL**.



Understanding the Menu Bar

To navigate the **Human Capital Reflection®** service, you use the left navigation menu. Each button on the menu will open the window in the main pane on the screen. The left navigation menu will remain on the side so that you can open different areas within the **Human Capital Reflection®** service.

Breadcrumbs

At the top of the screen, you will see a string of text. See the following example:

This text at the top of the screen is a list of breadcrumb links. This shows you what page you are currently viewing in the program. Home will always be on the far left. To return to the main screen, click **Home**.

Left Navigation Menu

The left navigation menu contains collapsible categories that contain the buttons. The following categories have a + symbol on the left side of the text:

- Reports
- Groups
- Data Cleanser

To open and close the different categories, click on the blue menu bar with the + symbol .

The following table describes each menu item (button):

Category	Menu	Description
Reports	Customize Reports	Opens the Customize Reports page where you can create custom reports.
	View Reports	Opens the View Reports page where you can view your customized reports and strategic plans.
Groups	Create Strategic Plan	Opens the Create Strategic Plan page where you can create business groups, assign managers, and email login information to create a strategic plan. On the Manager's login, it opens the Create Strategic Plan page where the manager can Manage a Strategic Plan.
Data Cleanser	Create Duplicate Report	Opens the Duplicate Report page where you can view a Duplicate report.

Category	Menu	Description
	Create Null Report	Opens the Null Report page where you can view a Null report.
	Create Conflicts Report	Opens the Conflicts Report page where you can view a Conflicts report.

Customizing Reports

The **Human Capital Reflection®** service provides tools on the Customize Report page that allow you to customize your own reports. The Customize Reports page allows you to create the following types of customized reports:

- Gap report – Shows how many open positions the company will have based on the projected turnover and fill rate.
- Fill rate – Shows how many people the company will hire based on data supplied.
- Retirement – Shows how many positions will open due to retirement based on age.
- Turnover – Shows how many employees the company will lose based on internal hiring, firing, retirement, etc.

You can customize the reports by using different filters that create the report with only the areas you specify. These filters narrow the report to specialized areas to help you better analyze your data. The Customize Reports page categorizes these specialized areas into different levels. You can filter your reports by the following levels:

- Business Unit
- Company
- Departments
- Location

The Customize Reports page allows you to use one filter or two filters to narrowly define your report. If you use two filters, the second filter is limited by the first filter. For example, if you select Business Unit for Filter 1 and Location for Filter 2, than the Customize Reports page will only show locations for each business unit.

Specifically, you can do the following:

- Understand the custom reports page (See "Understanding the Customize Reports Page" on this page).
- Create a custom report (See "Creating a Customized Report," page 8).
- Modify a report's settings (See "Modifying Report Settings," page 11).

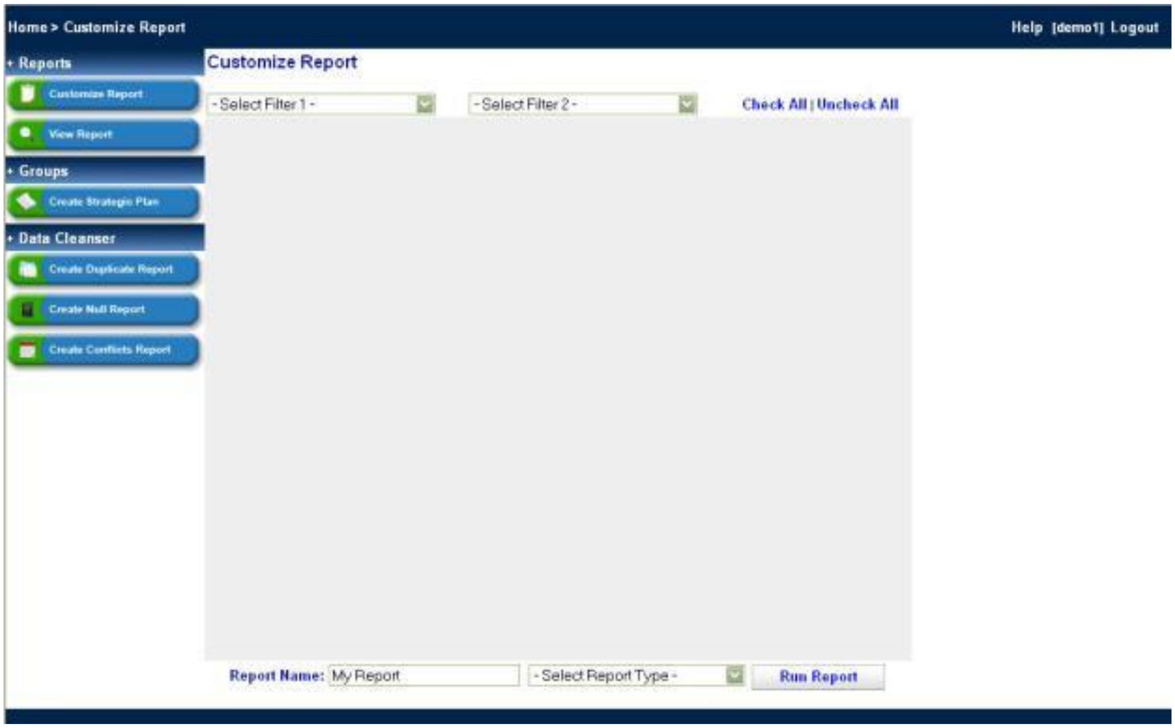
Understanding the Customize Reports Page

Using the Customize Reports page, you can create custom reports for your company.

Customize Reports Page Figures

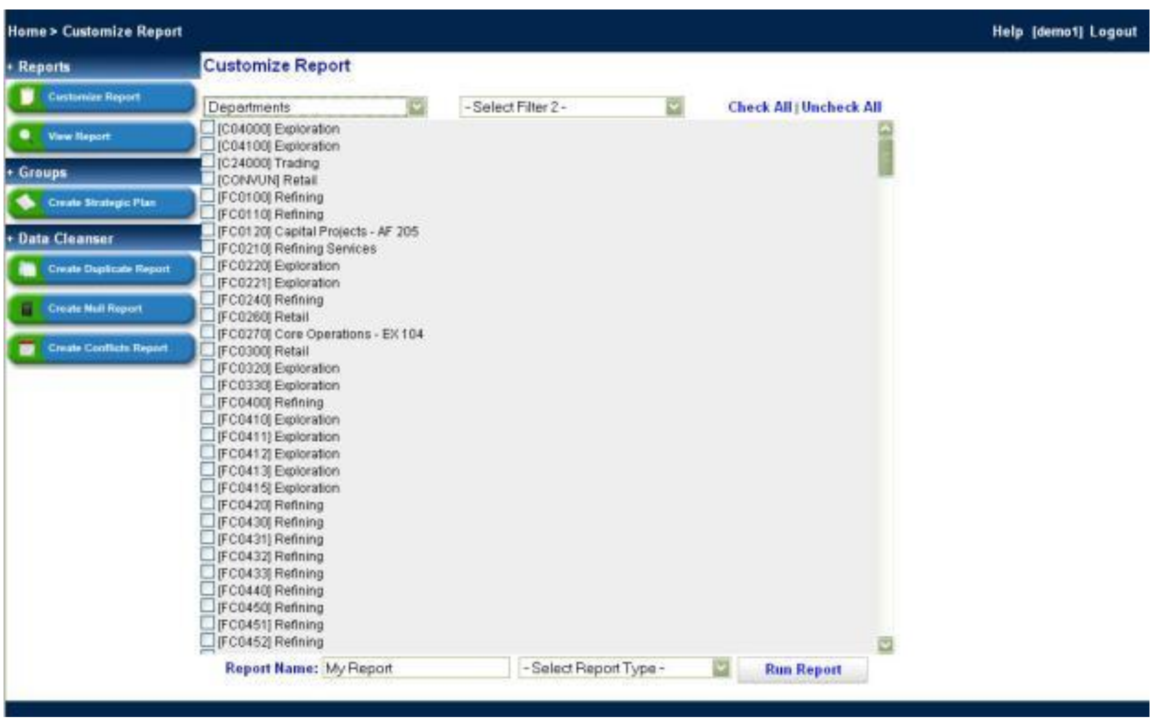
The following figure shows the Customize Reports page as it appears when you click **Customize Reports** in the left navigation menu.

Customize Reports Page



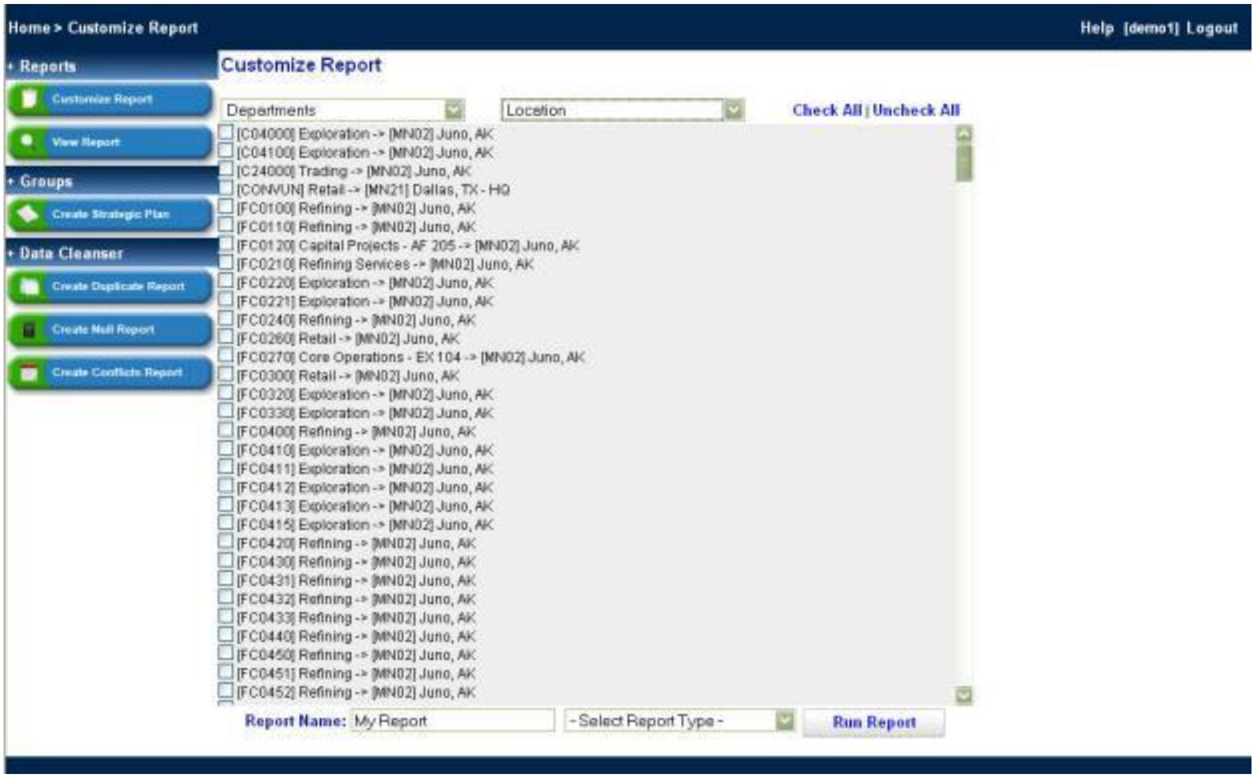
When you select a filter from the **- Select Filter 1-** list, the gray box below the list fills with options you can select by clicking the check boxes. The following figure shows an example with the **Departments** filter selected.

Custom Reports Page with One Filter



When you select a second filter from the **- Select Filter 2 -** list, the list of options below adds the additional filter to the right. When you select a check box with two filters, the report will reflect only those items that meet the criteria for both filters. The following figure shows an example with the **Departments** filter selected for Filter 1 and the **Location** filter selected for Filter 2.

Customize Reports Page with Two Filters



Descriptions of the Custom Reports Page

Name	Description
- Select Filter 1 -	List of filter options for the first filter. Lists the filter options in the gray box below. Lists the filter options for the following four categories: • Business Unit • Company • Departments • Location
- Select Filter 2 -	List of filter options for the second filter. Lists the filter options in the gray box below. Lists the filter options for the following four categories: • Business Unit • Company • Departments • Location
Check All	Selects all the available filter options.

Name	Description
Uncheck All	Deselects all the available filter options.
Report Name	Text box where you can type the name of your report. **Note** Use a naming convention to help you create unique report names and also keep track of your reports.
- Select Report Type -	List of report types. You can create the following report types: • Gap • Fill Rate • Retirement • Turnover
Run Report	Creates a report using the filters and criteria you selected.

Creating a Customized Report

To create customized reports, you need to select the different areas of your company on which you want to focus. Essentially, you create a report by filtering the results to receive only the business areas you want.

The Customize Reports page allows you to use one filter or two filters to narrowly define your report. If you use two filters, the second filter is limited by the first filter. For example, if you select Business Unit for Filter 1 and Location for Filter 2, than the Customize Reports page will only show locations for each business unit. After you create a custom report, you can view the reportsee "Viewing a Report," page 15.

To create a customized report

1. On the left navigation menu, click **Customize Reports**.
2. In the **- Select Filter 1 -** list, do any of the following:

If you want to create a report by	Then
Business unit level	a. Click **Business Unit**. In the gray box below, a list of business units with check boxes appears. b. Select the check boxes for the business units you want to include in your report.

If you want to create a report by	Then
Company level	a. Click **Company**. In the gray box below, a list with your company (or companies) appears with check boxes. b. Select the check box next to your company to create a company wide report.
Department level	a. Click **Departments**. In the gray box below, a list of your company's departments with check boxes appears. b. Select the check boxes for the departments you want to include in your report.
Location	a. Click **Location**. In the gray box below, a list of geographic locations with check boxes appears. b. Select the check boxes for the locations you want to include in your report.

3. Do one of the following:

- To create a report with one filter, continue to step 4.
- To create a report with two filters, In the **- Select Filter 2 -** list, do any of the following:

If you want to create a report by	Then
Business unit level	a. Click **Business Unit**. In the gray box below, a list of business units with check boxes appears. b. Select the check boxes for the business units you want to include in your report.
Company level	a. Click **Company**. In the gray box below, a list with your company (or companies) appears with check boxes. b. Select the check box next to your company to create a company wide report.

If you want to create a report by	Then
Department level	a. Click **Departments**. In the gray box below, a list of your company's departments with check boxes appears. b. Select the check boxes for the departments you want to include in your report.
Location	a. Click **Location**. In the gray box below, a list of geographic locations with check boxes appears. b. Select the check boxes for the locations you want to include in your report.

4. In the **Report Name** box, type the name of the report.

> **Note** You can create multiple reports of the same type, but remember to give each report a unique name so you can find it later. You can use the month and year, or date you generated the report to separate it from other reports. For example, Houston_Turnover_**1108**, and Houston_Turnover_**0109**.

5. In the **- Select Report Type -** list, do one of the following:

If you want to create a	Then click
Report that analyzes potential future workforce deficits or gaps	**Gap Report**
Report that predicts how many people you will hire for a job position based past on trends	**Fill Rate Report**
Report that shows the number of people that might retire in the next five years based on age	**Retirement Report (Average)**
Report that projects losses of human capital based on past trends	**Turnover Report**

6. Click **Run Report**.
7. View the report (see "Viewing a Report," page 15).

Modifying Report Settings

After you've created a custom report, or started setting up the report, you may want to make some changes before submitting the report. You can start over by unchecking all the filters that you applied, or even choose to check all the filters for a comprehensive report.

To modify report settings

1. After you have already started to create a custom report, do any of the following:

If you want to	Then
Select all available filters	Click **Check All**.
Deselect all checked filters	Click **Uncheck All**.
Modify business unit level filters	In the **- Select Filter 1 -** and/or the **- Select Filter 2 -** list(s), do the following: a. Click **Business Unit**. In the gray box below, a list of business units with check boxes appears. b. Select or deselect the check boxes for the business units you want to include or exclude in your report.
Modify the company level filter	In the **- Filters -** list, do the following: a. Click **Company**. In the gray box below,a list of your company's departments with check boxes appears. b. Select or deselect the check box next to your company to create a company wide report.
Modify department level filters	In the **- Filters -** list, do the following: a. Click **Departments**. In the gray box below, a list of your company's departments with check boxes appears. b. Select or deselect the check boxes for the departments you want to include or exclude in your report.
Modify location filters	In the **- Filters -** list, do the following: a. Click **Location**. In the gray box below, a list of geographic locations with check boxes appears. b. Select or deselect the check boxes for the locations you want to include or exclude in your report.

2. In the **Report Name** box, type the name of the report.

> **Note** You can create multiple reports of the same type, but remember to give each report a unique name so you can find it later. You can use the month and year, or date you generated the report to separate it from other reports. For example, Houston_Turnover_1108, and Houston_Turnover_0109.

3. In the **- Select Report Type -** list, do one of the following:

If you want to create a	Then click
Report that analyzes potential future workforce deficits or gaps	**Gap Report.**
Report that predicts how many people you will hire for a job position based past on trends	**Fill Rate Report.**
Report that shows the number of people that might retire in the next five years based on age	**Retirement Report (Average).**
Report that projects losses of human capital based on past trends	**Turnover Report.**

4. Click **Run Report**.
5. View the report (see "Viewing a Report," page 15).

Viewing Reports

The View Reports page allows you to select reports you requested on the Customize Reports page. You can view any of the report types you previously created/requested.

Specifically you can do the following:

- Understand the View Reports page (See "Understanding the View Reports Page" on this page).
- View a report (See "Viewing a Report," page 15).
- Interpret a report (See "Interpreting Reports," page 15).
- Export a report (See "Exporting a Report," page 23).
- Delete a report (See "Deleting a Report," page 24).

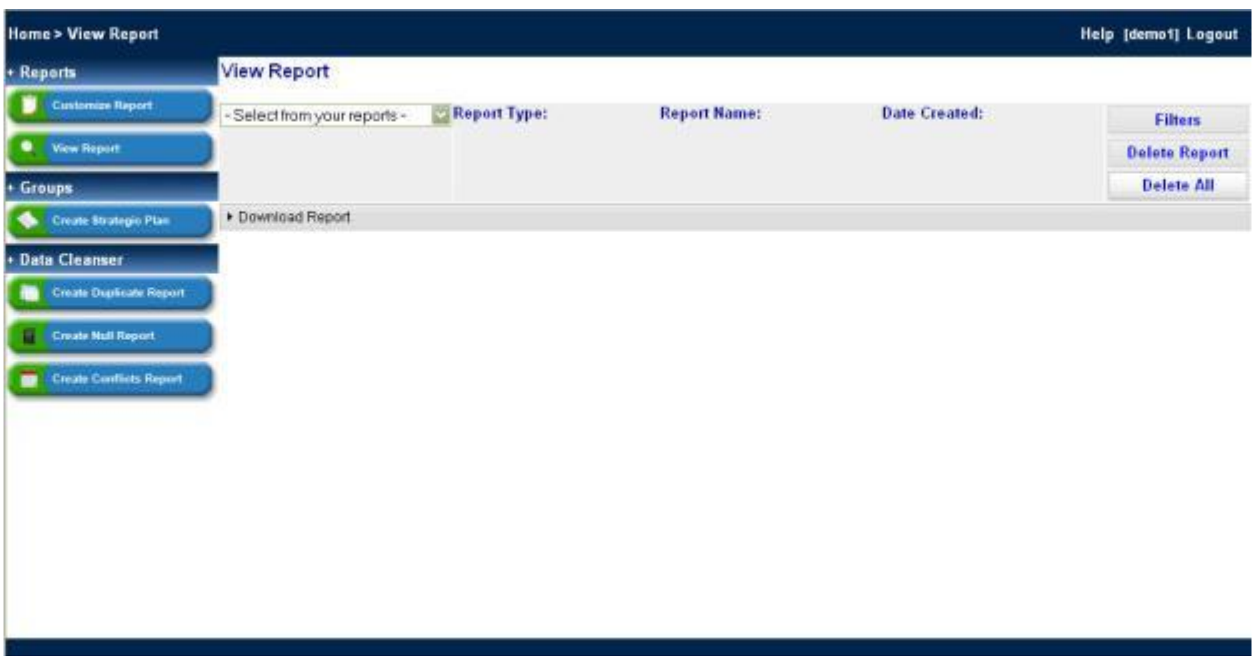
Understanding the View Reports Page

On the View Reports page, you can view all your reports. You can also sort the reports so that the information appears in a different order depending on what you select.

View Reports Page Figures

The following figure shows the View Reports page as it appears when you click **View Reports** in the left navigation menu.

View Reports Page

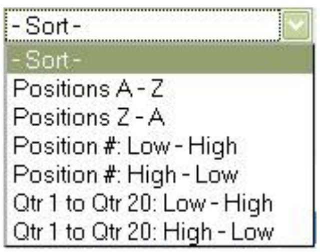


After you select a report to view from the **- Select from your reports -** list, a new **- Sort -** list appears below it. Also, when you click the **Download Report link**, the box below expands and shows the **Excel Report** and **PDF Report buttons**. The following figure shows the title bar with both the - Sort - list below the - Select from your reports - list and the Download Report box expanded.

View Reports Page Title Bar with Sort and Download Report

The following figure shows all the options available in the **- Sort -** list.

- Sort - List



Descriptions of the View Reports Page

Name	Description
- Select from your reports -	List of reports you have created. The list contains reports created using the Customize Reports page and Create Strategic Plan page.
- Sort -	List of options by which you can sort your report. Valid values are: • Positions A - Z – Sorts the report alphabetically starting with A. • Positions Z - A – Sorts the report alphabetically starting with Z. • Position #: Low - High – Sorts the report by position number starting with the lowest number. • Position #: High - Low – Sorts the report by position number starting with the highest number. • Qtr 1 to Qtr 20: Low - High – Sorts the report by quarter starting with the lowest. • Qtr 1 to Qtr 20: High - Low Sorts the report by quarter starting with the highest.
Report Type	Type of report. Valid values are: • Gap report – Shows how many open positions the company will have based on the projected turnover and fill rate. • Fill rate – Shows how many people the company will hire based on data supplied. • Retirement – Shows how many positions will open due to retirement based on age. • Turnover – Shows how many employees the company will lose based on

Name	Description
	internal hiring, firing, retirement, etc.
Report Name	Name of the report. Strategic Plan reports will have names automatically generated with a time stamp from when they were created.
Date Created	Date the report was created.
Filters	Opens a window that displays all the filters used to make the report. To close this window, click the **X** in the upper-right corner of the small window.
Delete Report	Deletes the selected report.
Delete All	Deletes all of your reports.
Download Report	Opens the download report box which contains the buttons that allow you to download your report in either an Excel spreadsheet or a .PDF file.
Excel Report	Exports the report to an Excel spreadsheet.
PDF Report	Exports the report to a .PDF file.

Viewing a Report

The View Reports page is where you can view your reports. You can view reports created using the Customize Reports page and Create Strategic Plan page page.

To view a report

1. On the left navigation menu, click **View Reports**.
2. In the **- Select from your reports -** list, click the name of the report you want to view.
3. In the **- Sort -** list, click the selection for how you want to sort your report.

> **Note** If you do not select anything from the **- Sort -** list, the default is alphabetically A- Z.

4. Interpret the report see "Interpreting Reports," page 15.

Interpreting Reports

The **Human Capital Reflection®** service allows you to create the following types of reports:

- Gap report – Shows how many open positions the company will have based on the projected turnover and fill rate.
- Fill rate – Shows how many people the company will hire based on data supplied.
- Retirement – Shows how many positions will open due to retirement based on age.
- Turnover – Shows how many employees the company will lose based on internal hiring, firing, retirement, etc.

This section provides definitions and information for the different reports and how to interpret them. Specifically you can:

- Interpret a gap report (See "Interpreting Gap Reports" on this page).
- Interpret a fill rate report (See "Interpreting Fill Rate Reports," page 18).
- Interpret a retirement report (See "Interpreting Retirement Reports," page 19).
- Interpret a turnover report (See "Interpreting Turnover Reports," page 21).

Interpreting Gap Reports

The **Human Capital Reflection®** service creates the gap report by showing the fill rate minus the turnover. The service calculates, in an average over three years, how many people you will hire minus the number of people you will lose. The number in the box of the gap report represents how many people you will need (negative number) or have (positive number) based on your current trends.

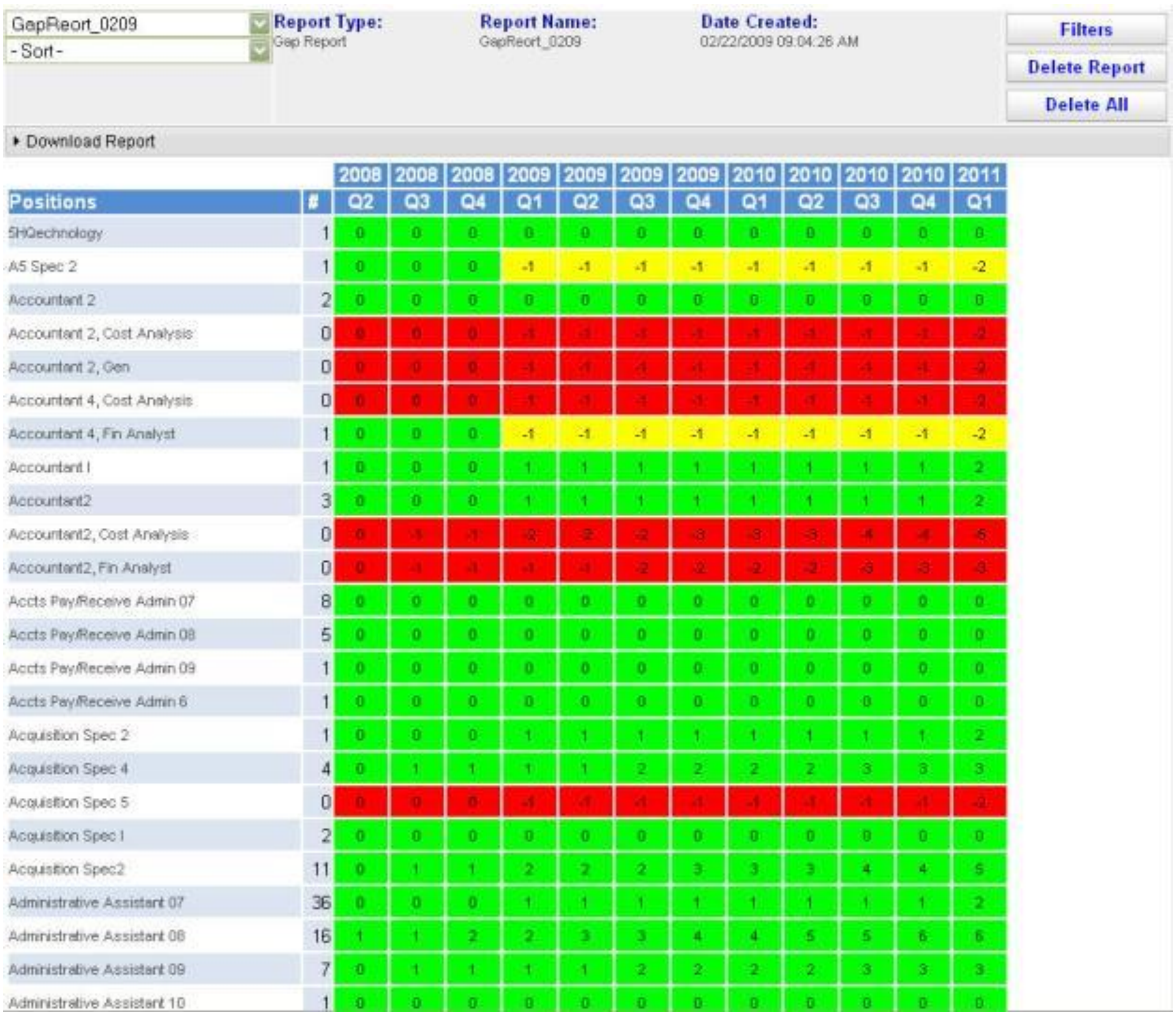
> **Note** Strategic reports are more accurate gap reports that use manager input to weight the calculations based on company specific information.

The following table describes the columns of the report.

Column Name	Description
Positions	Position title or job title.The position list is based on the filters you selected on the Customize Report page. The numbers to the right describe general trends of the position on the left.
#	Number of active employees for the most recent data received over a full quarter for the position/job title. The number is based on the filters you selected on the Customize Report page. For example, if the human resource data is from January 2005 to November 2008, the # contains the number of employees that are still active, including employees turned over in third quarter of 2008. The system uses third quarter data because fourth quarter data is incomplete. In the **Example of a Gap Report** on page 17, position **A5 Spec 2…** has a value of 1 which shows that there is 1 active employee up to, but not including, quarter 2 of 2008 with that job title. **Note** If you click the current count number of a position in question, a dialog box will appear showing a list of departments in which all those positions with that job title are located.
The remaining 12 columns 2008Q2 – 2011Q1 in the Example of a Gap Report on page 17	Projections for the position. The number in the box of the gap report represents how many people you will need (negative number) or have (positive number) based on your current trends. **Note** The column titles are composed of two sections: year and quarter. (Q1 = Quarter 1.) In the **Example of a Gap Report** on page 17, position **A5 Spec 2…** is -1 in the

Column Name	Description
	2009Q1 (1st quarter of 2009) which means that one employee may be lost during that quarter and a gap will occur. Position **Acquisition Spec 4…** shows positive numbers in all the columns which means growth and the company will be hiring more employees for that position.
Green numbers	Growth or no growth. These numbers will either be 0 (no change in number of employees) or a positive number which means growth. Numbers are aggregated over time.
Yellow numbers	Medium impact of negative growth (employee losses). These numbers mean the company is beginning to loose employees for that position. Numbers are aggregated over time.
Red numbers	Severe impact of negative growth (employee losses). These numbers mean the company is loosing a large amount of employees for that position. Numbers are aggregated over time.

Example of a Gap Report


GapReort_0209
- Sort -
Report Type: Gap Report
Report Name: GapReort_0209
Date Created: 02/22/2009 09:04:26 AM
Filters
Delete Report
Delete All
▸ Download Report

		2008	2008	2008	2009	2009	2009	2009	2010	2010	2010	2010	2011
Positions	**#**	**Q2**	**Q3**	**Q4**	**Q1**	**Q2**	**Q3**	**Q4**	**Q1**	**Q2**	**Q3**	**Q4**	**Q1**
5HQechnology	1	0	0	0	0	0	0	0	0	0	0	0	0
A5 Spec 2	1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Accountant 2	2	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 2, Cost Analysis	0	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Accountant 2, Gen	0	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Accountant 4, Cost Analysis	0	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Accountant 4, Fin Analyst	1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Accountant I	1	0	0	0	1	1	1	1	1	1	1	1	2
Accountant2	3	0	0	0	1	1	1	1	1	1	1	1	2
Accountant2, Cost Analysis	0	0	-1	-1	-2	-2	-2	-3	-3	-3	-4	-4	-6
Accountant2, Fin Analyst	0	0	-1	-1	-1	-1	-2	-2	-2	-2	-3	-3	-3
Accts Pay/Receive Admin 07	8	0	0	0	0	0	0	0	0	0	0	0	0
Accts Pay/Receive Admin 08	5	0	0	0	0	0	0	0	0	0	0	0	0
Accts Pay/Receive Admin 09	1	0	0	0	0	0	0	0	0	0	0	0	0
Accts Pay/Receive Admin 6	1	0	0	0	0	0	0	0	0	0	0	0	0
Acquisition Spec 2	1	0	0	0	1	1	1	1	1	1	1	1	2
Acquisition Spec 4	4	0	1	1	1	1	2	2	2	2	3	3	3
Acquisition Spec 5	0	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Acquisition Spec I	2	0	0	0	0	0	0	0	0	0	0	0	0
Acquisition Spec2	11	0	1	1	2	2	2	3	3	3	4	4	5
Administrative Assistant 07	36	0	0	0	1	1	1	1	1	1	1	1	2
Administrative Assistant 08	16	1	1	2	2	3	3	4	4	5	5	6	6
Administrative Assistant 09	7	0	1	1	1	1	2	2	2	2	3	3	3
Administrative Assistant 10	1	0	0	0	0	0	0	0	0	0	0	0	0

Interpreting Fill Rate Reports

The fill rate report shows how many people you will hire for a job position based past on the past two years, or if your company provided more than two years of historical data, however many years of data you provided. This number is difference between turnover and the actual fill rate.

Ultimately, third party recruiting and development systems will provide the actual fill rates for the **Human Capital Reflection®** service. Companies fill positions in two ways: recruiting and developing. The **Human Capital Reflection®** service needs to be able to tell if a company filled a position through internal promotion or external recruiting. This information will provide more accurate results for the fill rate reports.

Column Name	Description
Positions	Position title or job title.The position list is based on the filters you selected on the Customize Report page. The numbers to the right describe general trends of the position on the left.
#	Number of active employees for the most recent data received over a full quarter for the position/job title. The number is based on the filters you selected on the Customize Report page. For example, if the human resource data is from January 2005 to November 2008, the # contains the number of employees that are still active, including employees turned over in third quarter of 2008. The system uses third quarter data because fourth quarter data is incomplete. In the **Example of a Fill Rate Report** on page 19, position **Gas Technician 07** has a value of 3 which shows that there are 3 active employee up to, but not including, quarter 2 of 2008 with that job title. **Note** If you click the current count number of a position in question, a dialog box will appear showing a list of departments in which all those positions with that job title are located.
The remaining 12 columns 2008Q2 – 2011Q1 in the Example of a Fill Rate Report on page 19	Projections for the position for how many employees you will hire in a position over time. The numbers are aggregated over time. **Note** The column titles are composed of two sections: year and quarter. (Q1 = Quarter 1.) In the **Example of a Fill Rate Report** on page 19, position **Maintenance 08** shows growth beginning possibly in the 1st quarter of 2009 (**2009Q1**).

Example of a Fill Rate Report

View Report

2 Locatoins Fill Rate
- Sort -

Report Type: Fill Rate Report

Report Name: 2 Locatoins Fill Rate

Date Created: 02/21/2009 06:40:33 PM

Filters | Delete Report | Delete All

▸ Download Report

		2008	2008	2008	2009	2009	2009	2009	2010	2010	2010	2010	2011
Positions	**#**	**Q2**	**Q3**	**Q4**	**Q1**	**Q2**	**Q3**	**Q4**	**Q1**	**Q2**	**Q3**	**Q4**	**Q1**
Acquisition Spec 5	00	0	0	0	0	0	0	0	0	0	0	0
College Intern Junior-Nontech	10	0	0	1	1	1	1	1	1	1	1	2
Customer Service Rep 10	10	0	0	0	0	0	0	0	0	0	0	0
Eng 4, Diesel Assurance	10	0	0	1	1	1	1	1	1	1	1	2
Eng 4, Test	10	0	0	0	0	0	0	0	0	0	0	0
Eng 5, Refining	10	0	0	0	0	0	0	0	0	0	0	0
Gas Technician 07	31	1	2	2	3	3	4	4	5	5	6	6
Gas Technician 09	30	0	0	0	0	0	0	0	0	0	0	0
Gas Technician 6	10	0	0	1	1	1	1	1	1	1	1	2
Industrial Sec Spec I	00	0	0	1	1	1	1	1	1	1	1	2
Inspector	152	4	6	8	9	11	13	15	17	19	21	23
ISO Specialist 4	00	0	0	0	0	0	0	0	0	0	0	0
Machinist 07	20	0	0	1	1	1	1	1	1	1	1	2
Machinist 08	30	1	1	2	2	2	3	3	3	4	4	5
Machinist 09	10	0	0	0	0	0	0	0	0	0	0	0
Maintenance 08	20	0	0	1	1	1	1	1	1	1	1	2
Maintenance 09	10	0	0	0	0	0	0	0	0	0	0	0
Matl Dist/Handling Support 09	10	0	0	0	0	0	0	0	0	0	0	0
Prod Plan,Sched&Matl Ctrl2	30	0	0	1	1	1	1	1	1	1	1	2
Quality LPG OperatorTech 08	20	0	0	1	1	1	1	1	1	1	1	2
Quality LPG OperatorTech 09	10	0	0	0	0	0	0	0	0	0	0	0
Senior Machinist	10	0	0	0	0	0	0	0	0	0	0	0

Interpreting Retirement Reports

The retirement report shows how many employees are due to retire based on age. You can use this information to train new employees to replace retiring ones before a gap forms, thereby minimizing possible risks due to an inexperienced work force.

Column Name	Description
Positions	Position title or job title. The position list is based on the filters you selected on the Customize Report page. The numbers to the right describe general trends of the position on the left.

Column Name	Description
#	Number of active employees for the most recent data received over a full quarter for the position/job title. The number is based on the filters you selected on the Customize Report page. For example, if the human resource data is from January 2005 to November 2008, the # contains the number of employees that are still active, including employees turned over in third quarter of 2008. The system uses third quarter data because fourth quarter data is incomplete. In the **Example of a Retirement Report** on page 21, position **Accountant 2** has a value of 2 which shows that there are 2 active employee up to, but not including, quarter 2 of 2008 with that job title. **Note** If you click the current count number of a position in question, a dialog box will appear showing a list of departments in which all those positions with that job title are located.
The remaining 12 columns 2008Q2 – 2011Q1 in the Example of a Retirement Report on page 21	Projections of future retirements for the position based on a retirement age of 65 (default value that can be changed). The number in the box represents the number of employees the company will loose in that position based on retirement. The number is aggregated over time. **Note** The column titles are composed of two sections: year and quarter. (Q1 = Quarter 1.) In the **Example of a Retirement Report** on page 21, position **Administrative Assistant 09** is 1 in the **2010Q1** (first quarter of 2010) which means that one employee may retire (turns 65) and leave the company during that quarter.
Green numbers	No employees are eligible to retire for that position. Numbers are aggregated over time.
Yellow numbers	Medium impact of possible employee retirements. These numbers mean the company is beginning to loose employees for that position due to retirement and a gap forms. Numbers are aggregated over time.
Red numbers	Severe impact of possible employee retirements. These numbers mean the company is loosing a large amount of employees for that position due to retirement forming large gaps. Numbers are aggregated over time.

Example of a Retirement Report

Positions	#	2008 Q2	2008 Q3	2008 Q4	2009 Q1	2009 Q2	2009 Q3	2009 Q4	2010 Q1	2010 Q2	2010 Q3	2010 Q4	2011 Q1
5HQechnology	1	0	0	0	0	0	0	0	0	0	0	0	0
A5 Spec 2	1	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 2	2	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 2, Cost Analysis	0	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 2, Gen	0	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 4, Cost Analysis	0	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 4, Fin Analyst	1	0	0	0	0	0	0	0	0	0	0	0	0
Accountant I	1	0	0	0	0	0	0	0	0	0	0	0	0
Accountant2	3	0	0	0	0	0	0	0	0	0	0	0	0
Accountant2, Cost Analysis	0	0	0	0	0	0	0	0	0	0	0	0	0
Accountant2, Fin Analyst	0	0	0	0	0	0	0	0	0	0	0	0	0
Accts Pay/Receive Admin 07	8	1	1	1	2	2	2	2	2	2	2	2	2
Accts Pay/Receive Admin 08	5	1	1	1	1	1	1	1	1	1	1	1	1
Accts Pay/Receive Admin 09	1	0	0	0	0	0	0	0	0	0	0	0	0
Accts Pay/Receive Admin 6	1	0	0	0	0	0	0	0	0	0	0	0	0
Acquisition Spec 2	1	0	0	0	0	0	0	0	0	0	0	0	0
Acquisition Spec 4	4	1	1	1	1	1	1	1	1	1	1	1	1
Acquisition Spec 5	0	0	0	0	0	0	0	0	0	0	0	0	0
Acquisition Spec I	2	1	1	1	1	1	1	1	1	1	1	1	1
Acquisition Spec2	11	2	2	2	2	2	2	2	2	2	2	2	3
Administrative Assistant 07	36	4	4	4	5	5	5	5	5	5	5	5	5
Administrative Assistant 08	16	2	2	2	2	2	2	2	2	2	2	2	3
Administrative Assistant 09	7	0	0	0	0	0	0	0	1	1	1	1	1
Administrative Assistant 10	1	0	0	0	0	0	0	0	0	0	0	0	0

Interpreting Turnover Reports

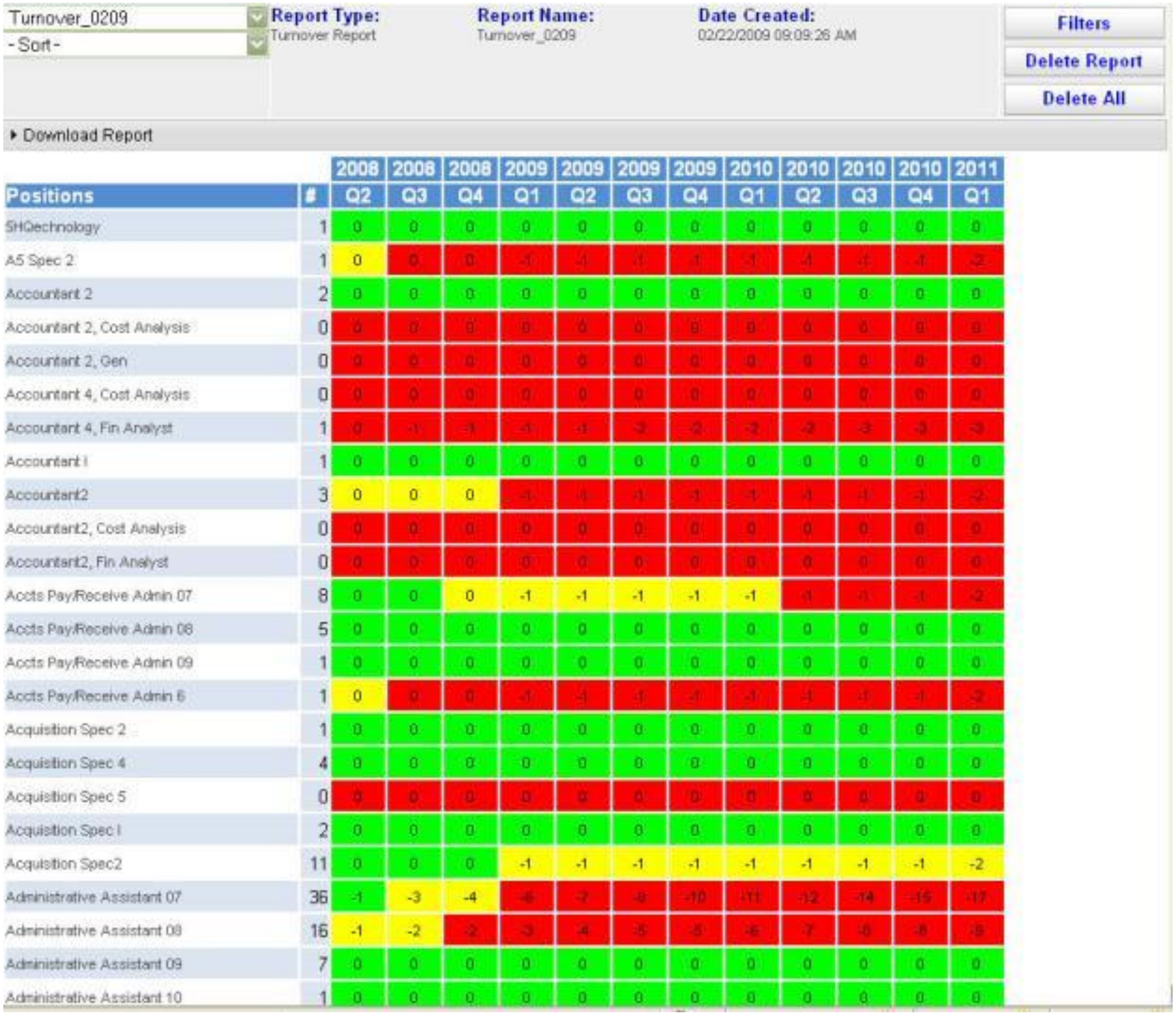
The turnover report shows how many employees the company will lose over the next three years based on internal hiring, firing, retirement, etc. The turnover report includes turnover for all reasons (voluntary turnover, retirement, and involuntary turnover). By using the turnover report, one can relatively compare positions to see which have higher turnover rates.

The **Human Capital Reflection®** service uses at least two years of historical data to predict future turnover. If the company provides more data, the turnover report will be more accurate for future trends.

Column Name	Description
Positions	Position title or job title. The position list is based on the filters you selected on the Customize Report page. The numbers to the right describe general trends of the position on the left.

Column Name	Description
#	Number of active employees for the most recent data received over a full quarter for the position/job title. The number is based on the filters you selected on the Customize Report page. For example, if the human resource data is from January 2005 to November 2008, the # contains the number of employees that are still active, including employees turned over in third quarter of 2008. The system uses third quarter data because fourth quarter data is incomplete. In the **Example of a Turnover Report** on page 23, position **A5 Spec 2…** has a value of 1 which shows that there is 1 active employee up to, but not including, quarter 1 of 2009 with that job title. **Note** If you click the current count number of a position in question, a dialog box will appear showing a list of departments in which all those positions with that job title are located.
The remaining 20 columns '09Q1 – '13Q4 in the Example of a Turnover Report on page 23	Projections for the position. The number in the box is the number of employees the company will lose over the next five years based on internal hiring, firing, retirement, etc. The turnover report includes turnover for all reasons (voluntary turnover, retirement, and involuntary turnover). **Note** The column titles are composed of two sections: year and quarter. (Q1 = Quarter 1.) In the **Example of a Turnover Report** on page 23, position **Accountant 2** is -1 in the **2009Q1** (1st quarter of 2009) which means that one employee may be lost during that quarter and a gap will occur. Numbers are aggregated over time.
Green numbers	No losses (turnover). Only 0 will appear green on a turnover report.
Yellow numbers	Medium impact of turnover (employee losses). These numbers mean the company is beginning to lose employees for that position. Numbers are aggregated over time.
Red numbers	Severe impact of turnover (employee losses). These numbers mean the company is losing a large amount of employees for that position. Numbers are aggregated over time.

Example of a Turnover Report



		2008	2008	2008	2009	2009	2009	2009	2010	2010	2010	2010	2011
Positions	#	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SHQechnology	1	0	0	0	0	0	0	0	0	0	0	0	0
A5 Spec 2	1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Accountant 2	2	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 2, Cost Analysis	0	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 2, Gen	0	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 4, Cost Analysis	0	0	0	0	0	0	0	0	0	0	0	0	0
Accountant 4, Fin Analyst	1	0	-1	-1	-1	-1	-2	-2	-2	-2	-3	-3	-3
Accountant I	1	0	0	0	0	0	0	0	0	0	0	0	0
Accountant2	3	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Accountant2, Cost Analysis	0	0	0	0	0	0	0	0	0	0	0	0	0
Accountant2, Fin Analyst	0	0	0	0	0	0	0	0	0	0	0	0	0
Accts Pay/Receive Admin 07	8	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Accts Pay/Receive Admin 08	5	0	0	0	0	0	0	0	0	0	0	0	0
Accts Pay/Receive Admin 09	1	0	0	0	0	0	0	0	0	0	0	0	0
Accts Pay/Receive Admin 6	1	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Acquisition Spec 2	1	0	0	0	0	0	0	0	0	0	0	0	0
Acquisition Spec 4	4	0	0	0	0	0	0	0	0	0	0	0	0
Acquisition Spec 5	0	0	0	0	0	0	0	0	0	0	0	0	0
Acquisition Spec I	2	0	0	0	0	0	0	0	0	0	0	0	0
Acquisition Spec2	11	0	0	0	-1	-1	-1	-1	-1	-1	-1	-1	-2
Administrative Assistant 07	36	-1	-3	-4	-6	-7	-8	-10	-11	-12	-14	-15	-17
Administrative Assistant 08	16	-1	-2	-2	-3	-4	-5	-5	-6	-7	-8	-8	-9
Administrative Assistant 09	7	0	0	0	0	0	0	0	0	0	0	0	0
Administrative Assistant 10	1	0	0	0	0	0	0	0	0	0	0	0	0

Exporting a Report

After you view a report on the View Reports page, you can export the report to two types of documents: PDF file and Excel spreadsheet. You can use the reports you've exported to share the results with other people in your company. The PDF report will look just like the report on the screen, and the excel spreadsheet version will separate the information into columns in a spreadsheet so you can manipulate the data any way you want.

To export a report

1. On the left navigation menu, click **View Reports**.
2. In the **- Select from your reports -** list, click the name of the report you want to export.
3. In the **- Sort -** list, click the selection for how you want to sort your report.

Note If you do not select anything from the **- Sort -** list, the default is alphabetically A- Z.

4. On the bottom of the title bar, click **Download Report**.

   The download report box expands and contains the **Excel Report** and **PDF Report** buttons.

5. In the download report box, do one of the following:

If you want to	Then
Create an Excel spreadsheet report	a. Click **Excel Report** A message appears asking how you want to save your report. b. To open the excel report immediately, click **Ok**.
Create a PDF report	Click **PDF Report**.

Deleting a Report

You can delete reports from the View Reports page.

To delete a report

1. On the left navigation menu, click **View Reports**.
2. In the **- Select from your reports -** list, click the name of the report you want to delete.
3. Click **Delete Report**.

To delete all of the reports

1. On the left navigation menu, click **View Reports**.
2. Click **Delete All**.

Creating a Strategic Plan

Strategic reports are gap reports (number of future open positions based on the projected turnover and fill rate) that use data specified by managers in the company to customize a report based on different strategic goals. To create the strategic report, you create different business groups on which you want to focus your plan/report. You will interpret a strategic report the same way as you interpret a gap report, see "Interpreting Gap Reports," page 16.

For example, Company ABC has several businesses including a shoe business and a clothing business. The HR representative from Company ABC would use the Create Strategic Plan page to create a shoe business group, which contains all the business units and positions necessary to manufacture shoes. The HR Representative assigns the shoe business group the manager who supports the shoe business. Then the HR representative emails login information for the **Human Capital Reflection®** service to the manager. When the ABC Company manager logs in with that information, he/she will only see the shoe business group information. The manager will then assign numbers to each position in the business group that approximate how many employees the company will hire (positive numbers) or lose (negative numbers) over time.

After your company goes through this process, the strategic report will reflect the information the managers provide which will allow you to better assess your future employee needs by business group.

Note When the manager logs into the **Human Capital Reflection®** service with the emailed login information, he/she will see only the business group you assigned to him/her.

Specifically you can:

- Understand the Create Strategic Plan page (See "Understanding the Create Strategic Plan Page," page 26).
- Build a business group (See "Building a Business Group," page 28).
- View a business group (See "Viewing a Business Group," page 29).
- Assign a manager to a business group (See "Assigning a Manager to a Business Group," page 29).
- Email a manager the login information (See "Emailing a Manager the Login Information," page 30).
- Delete a business group (See "Deleting a Business Group," page 30).

To create a strategic plan/report

1. Build a business group (See "Building a Business Group," page 28).
2. Assign a manager to the business group (See "Assigning a Manager to a Business Group," page 29).
3. Email the manager the login information (See "Emailing a Manager the Login Information," page 30).
4. The manager manages the strategic plan (See "Managing a Strategic Plan," page 37).

5. Create a customized report (See "Creating a Customized Report," page 8).
6. View the report (See "Viewing a Report," page 15).

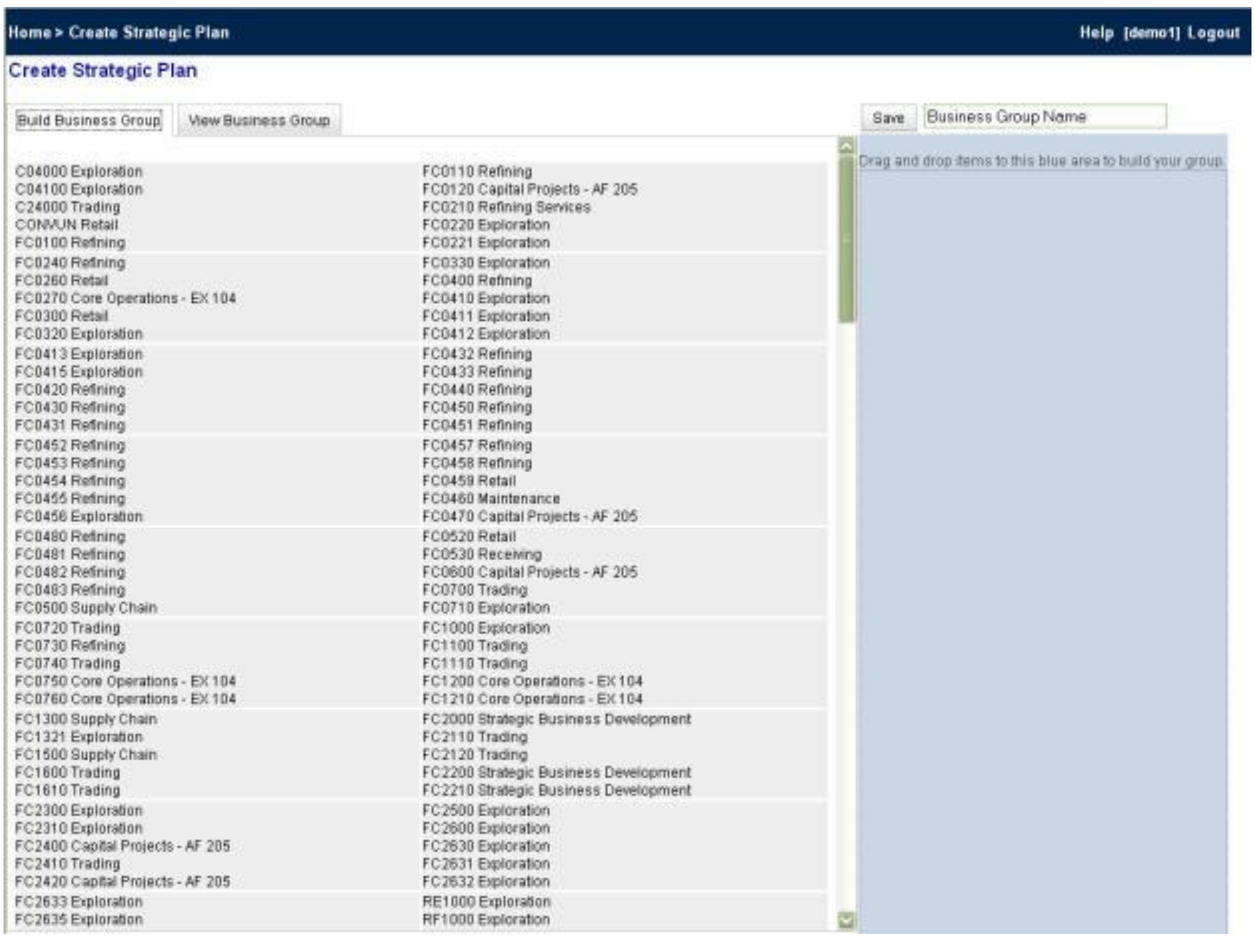
Understanding the Create Strategic Plan Page

The Create Strategic Plan page allows you to create and maintain all the information for your strategic plans. You can go through all the steps to create a business group, assign managers, and email the login information to the manager to continue creating the strategic report. You can also view and delete your existing business groups.

Create Strategic Plan Page Figures

The following figure shows the Create Strategic Plan page as it appears when you click **Create Strategic Plan**. Note that the page defaults to the **Build Business Group** tab.

Create Strategic Plan (Build Business Group)

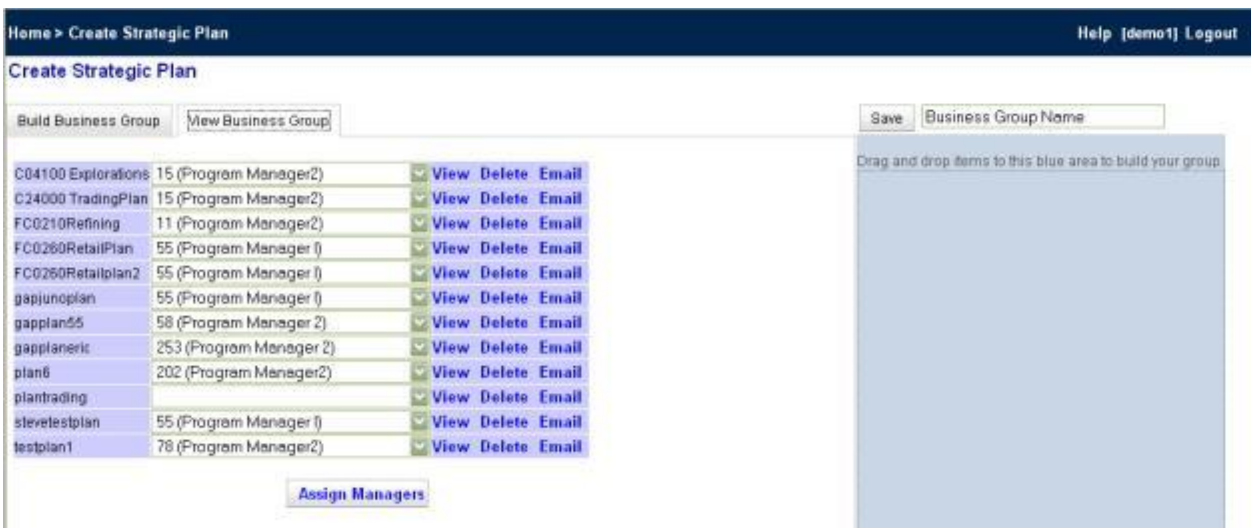


When you click a business line/group and drag it to the blue column on the right, the business line/group appears as a little box. The box will appear red when you are resting the mouse over an area that is not the blue box. The box will appear green when you are resting the mouse over the blue column to indicate that you can let go of the mouse button and drop the business line/group there. The following figure shows the business group/line as it appears right before you drop it in the blue column to add it to a business group.

Dragging and Dropping a Business Line/Group

The View Business Group tab allows you to view business groups, assign/email managers, and delete business groups. The following figure shows the View Business Group tab.

Create Strategic Plan (View Business Group)



Descriptions of the Create Strategic Plan Page

Name	Description
Build Business Group	On the Build Business Group tab, you can drag and drop business lines/groups into the blue column to create business groups.
Save	Saves the business group.
Business Group Name	Box where you can type the name of the business group before you click **Save**.
View Business Group	On the View Business Group tab, you can view business groups, delete business groups, assign managers to business groups, and email the managers login information.

Name	Description
Unlabeled List	List of managers by employee number and position title in parenthesis.
View	Opens a window where you can view the business lines/groups that make up the business group.
Delete	Deletes the business group.
Email	Emails the assigned manager the login information.
Assign Managers	Assigns the managers listed in the unlabeled list to the business groups they are associated with.

Building a Business Group

Business groups are the building blocks for creating strategic plans/reports. Ordinarily within a company, the smallest organizational group of employees is known as a **Department**. Therefore, you create a business group by grouping different departments together. You can build any kind of business group that can help your company assess future human resource needs. For example, you can build any of the following types of business groups:

Note You can separate the business groups in any way you imagine. You are not limited by the following examples.

- **Product Line** – Allows you to see if you will have a potential employee shortage or surplus in the areas that are necessary to create certain products.
- **Business Area** – Allows you to see if you will have a potential employee shortage or surplus in the different areas of the business.

To build a business group

1. On the left navigation menu, click **Create Strategic Plan**.
2. On the **Build Business Group** tab, in the **Business Group Name** box (top right area of the page), type the name of your business group.
3. In the gray columns on the left, find the business line/group you want to add to your business group.

   Note Use the vertical scroll bar near the middle of your screen to view all of the available business lines/groups.

4. Click the name of the business line/group and drag it to the blue column on the right.

5. To add more business lines/groups, repeat steps 3 and 4.
6. At the top of the blue column, click **Save**.

Viewing a Business Group

After you build a business group, you can view the details to make sure they are correct.

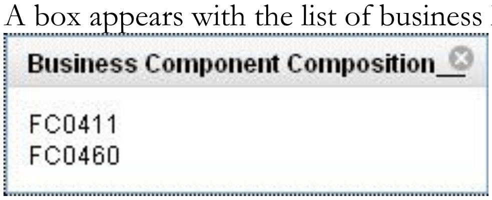
To view a business group

1. On the left navigation menu, click **Create Strategic Plan**.
2. Click the **View Business Group** tab.

   The View Business Group tab contains all of the business groups you have created in a table. The name of the business group is on the left side with a drop down list and three links to the right.

3. On the row of the business group you want to view, click **View**.

   A box appears with the list of business lines/groups in your business component.



4. To close the window, click the **X** in the upper-right corner.

Assigning a Manager to a Business Group

After you create a business group, you need to assign a manager to review it. The assigned manager is responsible for determining how many employees the company will probably hire or lose for each position over the next four years. Make sure you assign a manager to the business group who knows the departments/business lines well enough to determine potential hires and losses for the future.

To assign a manager to a business group

1. On the left navigation menu, click **Create Strategic Plan**.

2. Click the **View Business Group** tab.

   The View Business Group tab contains all of the business groups you have created in a table. The name of the business group is on the left side with a drop down list and three links to the right.

3. In the unlabeled list next to the business group you want to assign, click the manager's employee number (the manager type is in parentheses).
4. To assign more managers to other business groups, repeat step 3.
5. At the bottom of the list of business groups, click **Assign Managers**.

Emailing a Manager the Login Information

After you have assigned a manager to the business group, you can email that manager individual login information. The **Human Capital Reflection®** service will create a unique login for that manager and he/she will be able to see only the business groups you assigned to him/her. After you email the manager the login information, it is the manager's responsibility to log into the **Human Capital Reflection®** service and enter the number of future potential hires/losses for each position in the business group.

> **Note** You must assign a manager to the business group before you can email the login information, see "Assigning a Manager to a Business Group," page 29.

To email a manger the login information

1. On the left navigation menu, click **Create Strategic Plan**.
2. Click the **View Business Group** tab.

   The View Business Group tab contains all of the business groups you have created in a table. The name of the business group is on the left side with a drop down list and three links to the right.

3. On the row of the business group for which you want to email login information, click **Email**.

   The **Human Capital Reflection®** service emails the login information to the manager.

Deleting a Business Group

1. On the left navigation menu, click **Create Strategic Plan**.
2. Click the **View Business Group** tab.

   The View Business Group tab contains all of the business groups you have created in a table. The name of the business group is on the left side with a drop down list and three links to the right.

3. On the row of the business group you want to delete, click **Delete**.

   The business group is deleted.

Using the Data Cleanser

The data cleanser consists of several different reports that alert you to problems in your data. The data cleanser includes the following reports:

- Duplicate Report – Duplicate employee ID numbers.
- Null Report – Empty data fields where the **Human Capital Reflection®** service requires data. The **Human Capital Reflection®** service requires the following data for each employee:
    - Employee ID
    - Birth Date
    - Hire Date
    - Job Title
    - Department
    - Location
    - Business Unit ID
- Conflict Report – Dates and other information that conflict on an employee record. Possible conflicts are:
    - Birth Date
    - Hire Date
    - Termination Date
    - Employee ID
    - Location
    - Department ID

Specifically you can:

- View a duplicate report (See "Viewing Duplicate Reports" on this page).
- View a null report (See "Viewing Null Reports," page 34).
- View a conflict report (See "Viewing Conflict Reports," page 34).

Viewing Duplicate Reports

The duplicate report shows duplicate (or non-unique) employee ID numbers. This report allows you to identify duplicate employee ID numbers, so you can assign one of the employees a unique identification number.

To view a duplicate report

- On the left navigation menu under **Data Cleanser**, click **Create Duplicate Report**.

  The duplicate report appears in the main page to the right.

Viewing Null Reports

The null report allows you to identify empty data fields where the **Human Capital Reflection®** service requires data. The **Human Capital Reflection®** service requires the following data for each employee:

- Employee ID
- Birth Date
- Hire Date
- Job Title
- Department
- Location
- Business Unit ID

To view a null report

- On the left navigation menu under **Data Cleanser**, click **Create Null Report**.

  The null report appears in the main page to the right.

Viewing Conflict Reports

The conflict report allows you to identify dates and other information that conflict on an employee record. Possible conflicts are:

- Birth Date
- Hire Date
- Termination Date
- Employee ID
- Location
- Department ID

To view a conflict report

- On the left navigation menu under **Data Cleanser**, click **Create Conflict Report**.

  The conflict report appears in the main page to the right.

The Manager's Role

The **Human Capital Reflection®** service allows you to create a strategic plan (which creates an accurate and detailed Gap Report). To create this type of report, managers need to log into the **Human Capital Reflection®** service and enter the information necessary to make these detailed reports that are specific to your company.

When an HR Representative uses the **Human Capital Reflection®** service, he or she will create business groups using the Create Strategic Plan page. After the HR Representative creates the business group, he or she assigns managers to the different groups and sends login information to those managers through an email. When managers log into the **Human Capital Reflection®** service, they see only the business groups assigned to them.

Assigning managers to the business groups allows the manager who knows the most about that group to be in charge of providing the recruitment or rating information. Also, individual managers assigned to each group prevents managers from providing conflicting information for each position. This ensures the information is accurate and will provide the best reports and analysis possible.

The manager's role includes two procedures. Specifically you can:

- Understand the Manager's Login (See "Understanding the Manager's Login" on this page).
- Manage a Strategic Plan (See "Managing a Strategic Plan," page 37).

Understanding the Manager's Login

As the manager, when you log into the **Human Capital Reflection®** service, you will see only the business group assigned to you. The Create Strategic Plan page is open when you log in.

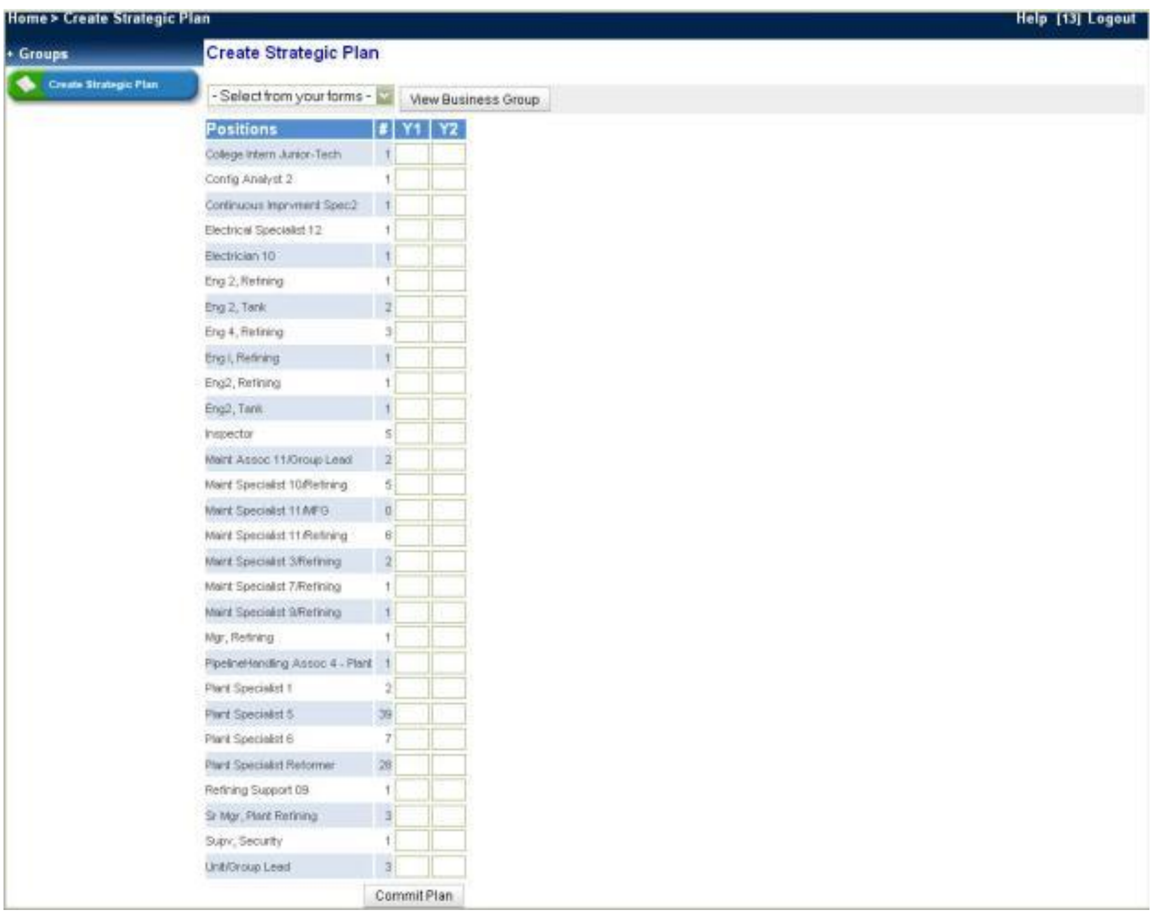
Figures of the Manager's Login

The following figure shows the Create Strategic Plan page as it appears when you first log in.

Create Strategic Plan (Manager Login)

The **- Select from your forms -** list contains the list of business groups assigned to you. After you click a business group from the list, the screen appears like the following figure.

Strategic Plan Business Group (Manager Login)



Descriptions of the Manager's Create Strategic Plan Page

Name	Description
- Select from your forms -	A list of the business groups assigned to the manager for a strategic plan/report.
View Business Group	Opens a window where you can view the business lines/group that make up the business group.
Positions	List of the positions in the business group.
#	Number of employees in that position.
Y1 – Y2	Boxes representing the next two years where the manager assigns the number of employees the company will hire or lose.
Commit Plan	Sends the information the manager entered to the **Human Capital Reflection®** service so the HR administrator can run a report using this information.

Managing a Strategic Plan

As the manager, you are responsible for providing the information needed to create a strategic plan/report. When you log into the **Human Capital Reflection®** service, you need to assign numbers to each position representing the number of employees the company will hire or lose over the next two years. Positive numbers represent future hires in a position and negative numbers represent future losses. If there is no expected change in that position, you can type 0 (zero).

To manage a strategic plan

1. On the **Create Strategic Plan** page, in the **- Select from your forms-** list, click the name of the business group you want to manage.
2. In the **Y1** column for each position, do one of the following:

Next year, if you plan to	Then
Hire more employees for this position	Type the number of employees you will hire.
Lose or fire employees for this position	Type a negative number for the employees you will lose. For example, if you plan on losing two employees next year, type -2.
Leave the number of employees the same	Type **0** (zero).

3. In the **Y2** column, repeat step **2** for the following year.
4. Click **Commit Plan**.