

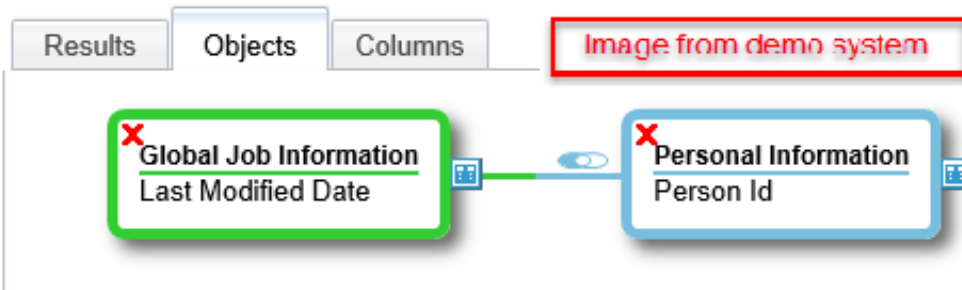
Managers Added Report

A report is needed to assist in the process of identifying employees who go from 0 direct reports to 1+ direct reports between two dates.

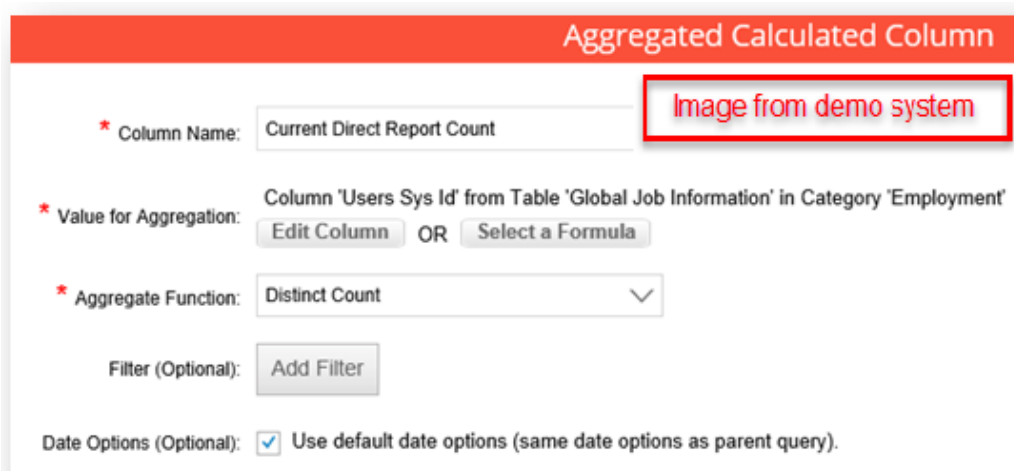
Fields to be available in the report output include:



Users Sys Id	Employee Name	Last Modified Date	Current Direct Report Count	Previous Direct Report Count
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- Person ID – ID of identified people manager from the Personal Information table
- Employee Name – Name of employee identified as a people manager, calculated column using the First and Last name fields from the Global Job Information table.
- Last Modified Date – This is the Job Information Last Modified Date of the employee named in the first two columns. This field has been included to help identify when the people manager has a last modified date on the previous date which would indicate the employee was already likely identified in the feed as a new manager. If the last modified date is not the previous date, the end user should consider taking the necessary action to ensure the interface picks up the employee on the next run.
- Current Direct Report Count – This is an aggregated calculated column that counts the number of direct reports assigned to the employee as of the run date of the report. Although the table does not appear in the report objects tab, the table Direct Reports Global Job Information is utilized in the aggregated calculated column.



Aggregated Calculated Column

* Column Name: Current Direct Report Count

* Value for Aggregation: Column 'Users Sys Id' from Table 'Global Job Information' in Category 'Employment'

Edit Column OR Select a Formula

* Aggregate Function: Distinct Count

Filter (Optional): Add Filter

Date Options (Optional): ☒ Use default date options (same date options as parent query).

- Previous Direct Report Count – This is an aggregated calculated field that counts the number of direct reports assigned to the employee as the date prior to the report run date. As with the previous field, although the table does not appear in the report objects tab, the table Direct

Reports Global Job Information is utilized in the aggregated calculated column. *This calculated column can and should be adjusted as described in the scenarios below.*

Aggregated Calculated Column

* Column Name: Image from demo system

* Value for Aggregation: Using Formula
 OR

* Aggregate Function:

Filter (Optional):

Date Options (Optional): ☐ Use default date options (same date options as parent query).

Aggregated Calculated Column

* Data Type:

Format:

Number
 > Direct Reports Global Job Information

Show Condition Editor

IF (([%AS_OF_DATE%] - Direct Reports Effective Start Date >= 1 AND [%AS_OF_DATE%] - Direct Reports Effective End Date <= 1) THEN
 Value = 1
 ELSE
 Value = 0

Image from demo system

Aggregated Calculated Column

* Data Type:

Format:

Number
 > Direct Reports Global Job Information

Show Condition Editor

IF (([%AS_OF_DATE%] - Direct Reports Effective Start Date >= 1 AND [%AS_OF_DATE%] - Direct Reports Effective End Date <= 1) THEN

Image from demo system

Date Options ?

Date Options

Overrides (Advanced)

Driving Table Options ?

* Driving Table

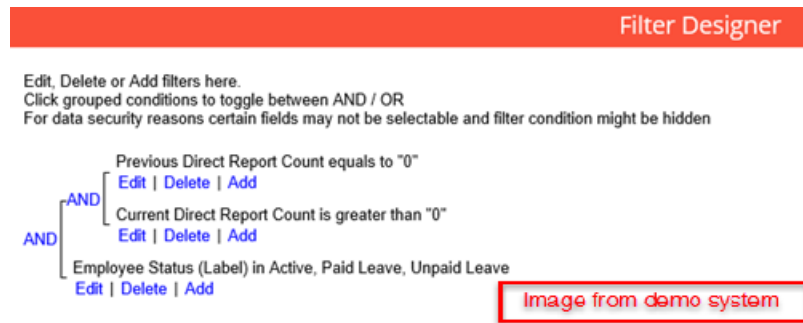
* Date Type

Related Table Options ?

* Date Type

Use Driving Table Selection At Runtime ☐ Image from demo system


The report has a query filter that restricts the report to pull only those employees whose current count of direct reports is >0 and whose previous count of direct reports was 0.



By default, the report is configured to compare the number of direct reports today to the number of direct reports the previous day (see above aggregated calculated column that has ≥ 1 and ≤ 1). There are times however when the user must modify the report to look back further. Three scenarios for usage of the report are defined below.

- Scenario 1: Report is scheduled to run daily to compare direct report counts the previous day
- Scenario 2: Report is scheduled to run Monday to compare direct report counts the previous Friday
 - o In this scenario the report should be modified to look back 3 days (≥ 3 and ≤ 3 respectively in the formula) to check for any changes processed the previous Friday.
 - o Alternatively, the report as in scenario 1 can be scheduled to run daily, including Saturday & Sunday and on Monday the end user can review the reports that ran over the weekend for any possible new people managers.
- Scenario 3: Report needs to be run to look in the past for any retroactive changes that impacted an employee's count of direct reports. It is recommended that periodically, as determined by the customer and the frequency which they have retroactive changes in the system, the custom modifies the Aggregated Calculated column for Previous Direct Report Count to look back further in time (e.g. ≥ 30 and ≤ 30 days) to identify any situations where an employee becomes a manager but the transaction was processed retroactively.

To modify the lookback for the Previous Direct Report Count, the end user should take the following steps:

- In Report Center select the Action to Edit the report
- On the report canvas page, either right click on the component or in the left menu select Edit Query
- In the Advanced Reporting Query designer tool, select the icon to open Calculated Columns 
- Select the aggregated calculated column called Previous Direct Report Count and select Edit
- In the Aggregated Calculated Column window select "Edit Formula"
- You will then need to edit both portions of the formula that reference '1' and change that number by clicking on the '1' to the number of days you wish to look back in the future
- Once the formula has been modified click OK
- Back on the previous window, you may need to double check that the Date Options (Optional) field is still set to Show All. This setting is required for the report to look back in history.

The customer can recreate the report in any other instance, or it can be exported and imported as needed. To move the report follow the below steps:

- In Report Center select the Action to Export
- When prompted, save the report to your desktop or desired folder
- In the receiving instance (e.g. production), select 'Import' in Report Center (this is next to the button for 'New' reports in Report Center)
- In the Import report definition window browse for the report template that was exported from the other instance and select Import.

Please note the report is designed to assist in identifying new people managers that may not have been fed to interfaces as a new manager. The end user of the report must still review the records on the report and determine if action needs to be taken on each record.