

# Advanced Reporting

## Guide to the manual method for creating Change Reports





# Manual method for Change Reporting

This document aims to guide a user through creating a “manual” Change Report (ie: without using the Change Reporting function made available in the new UI released in May 2015 (b1505)).

The current Change Reporting function allows for reporting changes on a single column only. Given this, the main benefit for manually creating these reports (over using the Change Reporting functionality) is to create a Change Report that shows changes in more than one column (which this guide will cover).

# New vs Classic Advanced Reporting User Interfaces

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**This guide assumes a basic level of knowledge in Advanced Reporting and contains two sections, each one describing the manual Change Reporting method for each UI of Advanced Reporting:**

- The 'new' Advanced Reporting UI was made available in the May 2015 release and most instances implemented since then will be on this UI, in addition to any existing instance that has requested to be moved to this new UI
- Most instances implemented prior to the May 2015 release will be using the 'classic' Advanced Reporting UI

If you are unsure which UI your instance is using, please refer to the screen shots in each section and choose the section which contains screen shots that match your instance.

This guide splits out how to duplicate the Change Reporting table in each of the UI's (new and classic) – the last section (applying necessary filters) applies to both UI's.

# Initial Notes

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The manual change reporting method works from the premise of a “base” or anchor table and then joining two instances of the table containing the change reporting columns onto this base table. Two separate instances of a table allows the query to apply a different date filter to each instance, which in turn retrieves the current and previous values.

Other tables unrelated to the change column can be pulled into the query for additional report data if required.

The following slides will refer to “current” and “previous” values – however the same method can apply for historical (rather than the current) values simply by adjusting the date filters on the relevant tables.

This method shows changes that occurred within a “day” timeframe. Should an employee have more than one change in a single day, only the last record in that day will be captured in the results.



# EC Job Information Changes

New UI

For this example we will look at the employee Marcus Hoff. He is currently in the *Enterprises* Department and the *Industries* Cost Center, having moved from *Industries* and *Industries Executive Office* respectively.

The screenshot displays the 'History of Job Information' for employee Marcus Hoff. It is divided into two main sections: 'History' and 'Job Information: Marcus Hoff'.

**History Section:**

- 08/29/2011:** Department: **Enterprises (CORP)** Industries (IND) (highlighted in blue). Cost Center Change: Cost Center Account: **Industries (30000)** Industries-Exec... (highlighted in blue). Includes a 'Take Action' dropdown.
- 11/01/2008:** Supervisor: No Manager Carla Grant. Job Classification: **Executive Vice-President (EXEC1)** Vic... Pay Grade: **Salary Grade 17 (GR-17)**. Standard Weekly Hours: 40. FTE: 1.
- 07/12/1995:** Data Change.

**Job Information: Marcus Hoff (Effective as of 08/29/2011):**

- Employee Status: Paid Leave
- Event: Leave of Absence
- Event Reason: Jury Leave (PLAJUR)
- Organizational Information:**
  - Company: Ace USA (ACE\_USA)
  - Business Unit: Industries (ACE\_IND)
  - Department: **Enterprises (CORP)** Industries (IND)
  - Location: San Mateo (US\_SFO)
  - Cost Center Account: **Industries (30000)** Industries-Executive Office (30001)
- Job Information:**
  - Timezone: No Selection

Red arrows point from the blue highlights in the history table to the corresponding blue highlights in the current job information details.

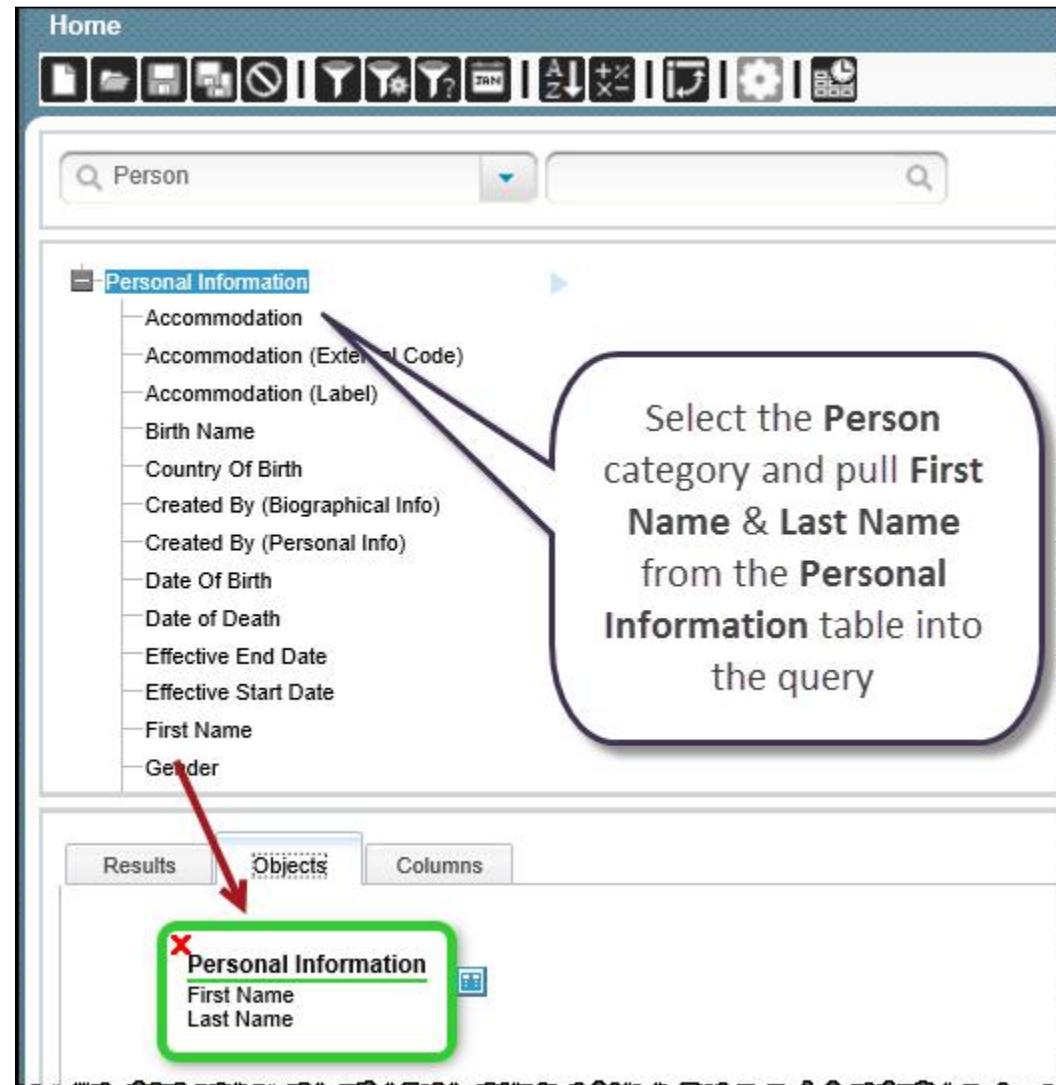
# Begin the query

*New UI*

To start, we will pull in data from the table which will be the 'anchor' table.

Typically this will be the Person > Personal Information table for queries that are Change Reporting on employee Job data, or reporting on employee Compensation data.

Select the **Person** category from the drop down and open the **Personal Information** table. Pull in the columns required from this table.



# Pull in the first “change” table

*New UI*

Navigate to the **Global Job Information** table from the **Personal Information** table and pull in the columns required for change reporting.

In this example we are looking at changes on the **Department** and **Cost Center** columns. The **Effective Start/End Dates** have also been selected so that we can see the “timeline” in the finished report.

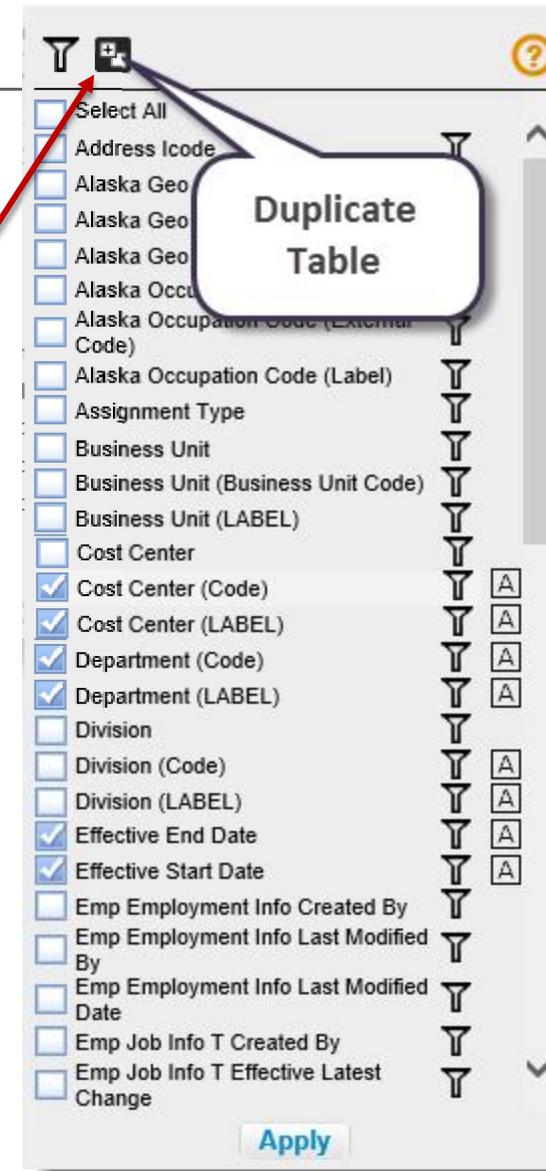
The screenshot displays the SAP Fiori 'Person' view. It is divided into two main sections: 'Personal Information' and 'Employment'. The 'Personal Information' section lists various attributes like Accommodation, Birth Name, and Country Of Birth. The 'Employment' section lists attributes like Address Icode, Alaska Geo Code, and Business Unit. A red arrow points from the 'Personal Information' header to the 'Global Job Information' table within the 'Employment' section. A callout box with a speech bubble contains the text: 'Expand Personal Information and navigate to the Global Job Information table to select the change reporting columns required'. Below the table lists, there are tabs for 'Results', 'Objects', and 'Columns'. The 'Objects' tab is active, showing two table objects: 'Personal Information' (highlighted with a green border) and 'Global Job Information' (highlighted with a blue border). A red arrow points from the 'Global Job Information' table in the upper section to its corresponding object in the 'Objects' tab. The 'Global Job Information' object lists selected columns: 'Cost Center (Code)', 'Cost Center (LABEL)', 'Department (Code)', 'Department (LABEL)', and 'Effective End Date', along with a 'Show More' link.

# Duplicate the first “change” table

New UI

We now need to create a second instance of the table containing the “change” columns.

Open the column menu for the **Global Job Information** table and click **Duplicate Table**.

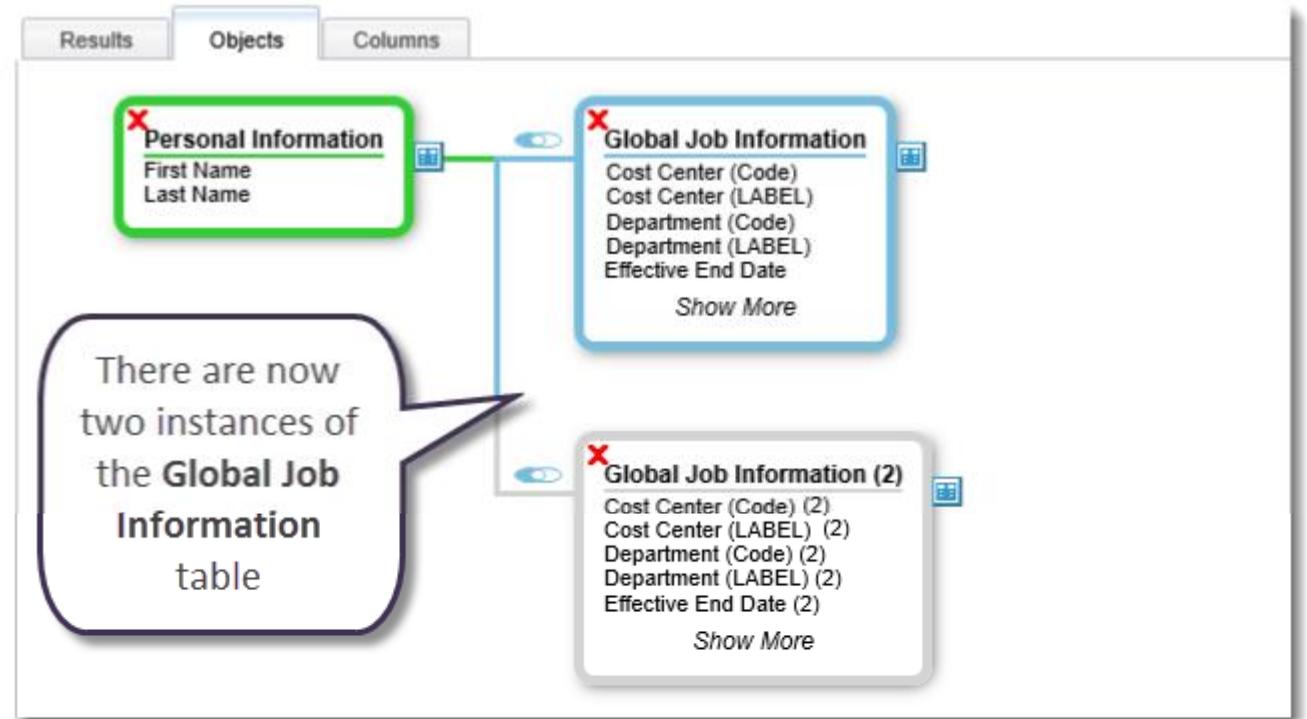


# Second instance of the “change” table is now created

*New UI*

The **Global Job Information** table has been duplicated, with the identical column settings as the original.

**Global Job Information** will be the table retrieving the “current” Job information and **Global Job Information (2)** will be the table retrieving the “previous” Job information. So that we can more easily identify which **Department + Cost Center** is the current and which **Department + Cost Center** is the previous, we will rename the columns in each table appropriately.



# Checkpoint

## New UI

We now have a report output that is duplicating the current Department and current Division for each employee. This occurs because both instances of the **Global Job Information** table defaults to the “current date”. As you can see in the first record, the columns in Group 1 have identical results as the columns in Group 2.

Please jump to the **Finalize the manual Change Reporting query by adding the required filters** section where we will apply date filters to retrieve the proper current & previous results for Department and Cost Center.

The screenshot shows a SAP report interface with a table of results. The table has two main groups of columns. The first group, labeled '1' in a red circle, contains columns for 'Current Start Date', 'Current End Date', 'Current CC Code', 'Current CC Label', 'Current Dept Code', and 'Current Dept Label'. The second group, labeled '2' in a red circle, contains columns for 'Previous Start Date', 'Previous End Date', 'Previous CC Code', 'Previous CC Label', 'Previous Dept Code', and 'Previous Dept Label'. The data for both groups is identical for the first record: Marcus Hoff, 8/29/2011, 12/31/9999, 30000, Industries, CORP, and Enterprises. The report title is 'zSF Test - Change Reporting Doco'. The interface includes navigation buttons for page and rows per page.

First Name	Last Name	Current Start Date	Current End Date	Current CC Code	Current CC Label	Current Dept Code	Current Dept Label	Previous Start Date	Previous End Date	Previous CC Code	Previous CC Label	Previous Dept Code	Previous Dept Label
Marcus	Hoff	8/29/2011	12/31/9999	30000	Industries	CORP	Enterprises	8/29/2011	12/31/9999	30000	Industries	CORP	Enterprises



# Duplicating the Change Reporting table in the 'classic' Advanced Reporting UI

*Please jump back to the **Duplicating the Change Reporting table in the 'new' UI** section if you are using the b1505 UI.*

# EC Job Information Changes

Classic UI

For this example we will look at the employee Marcus Hoff. He is currently in the *Enterprises* Department and the *Industries* Cost Center, having moved from *Industries* and *Industries Executive Office* respectively.

The screenshot displays the 'History of Job Information' for employee Marcus Hoff. It is divided into two main sections: 'History' and 'Job Information: Marcus Hoff'.

**History Section:**

- 08/29/2011:** Department: **Enterprises (CORP)** Industries (IND) (highlighted in blue). Cost Center Change: Cost Center Account: **Industries (30000)** Industries-Exec... (highlighted in blue). A 'Take Action' dropdown menu is visible.
- 11/01/2008:** Supervisor: No Manager Carla Grant. Job Classification: **Executive Vice-President (EXEC1)** Vic... Pay Grade: **Salary Grade 17 (GR-17)**. Standard Weekly Hours: 40. FTE: 1.
- 07/12/1995:** Data Change.

**Job Information: Marcus Hoff**  
Effective as of 08/29/2011  
Blue indicates that the item changed on this date

**Employee Status:** Paid Leave  
**Event:** Leave of Absence  
**Event Reason:** Jury Leave (PLAJUR)

**Organizational Information:**

- Company: Ace USA (ACE\_USA)
- Business Unit: Industries (ACE\_IND)
- Department: **Enterprises (CORP)** Industries (IND) (highlighted in blue)
- Location: San Mateo (US\_SFO)
- Cost Center Account: **Industries (30000)** Industries-Executive Office (30001) (highlighted in blue)

**Job Information:**

- Timezone: No Selection

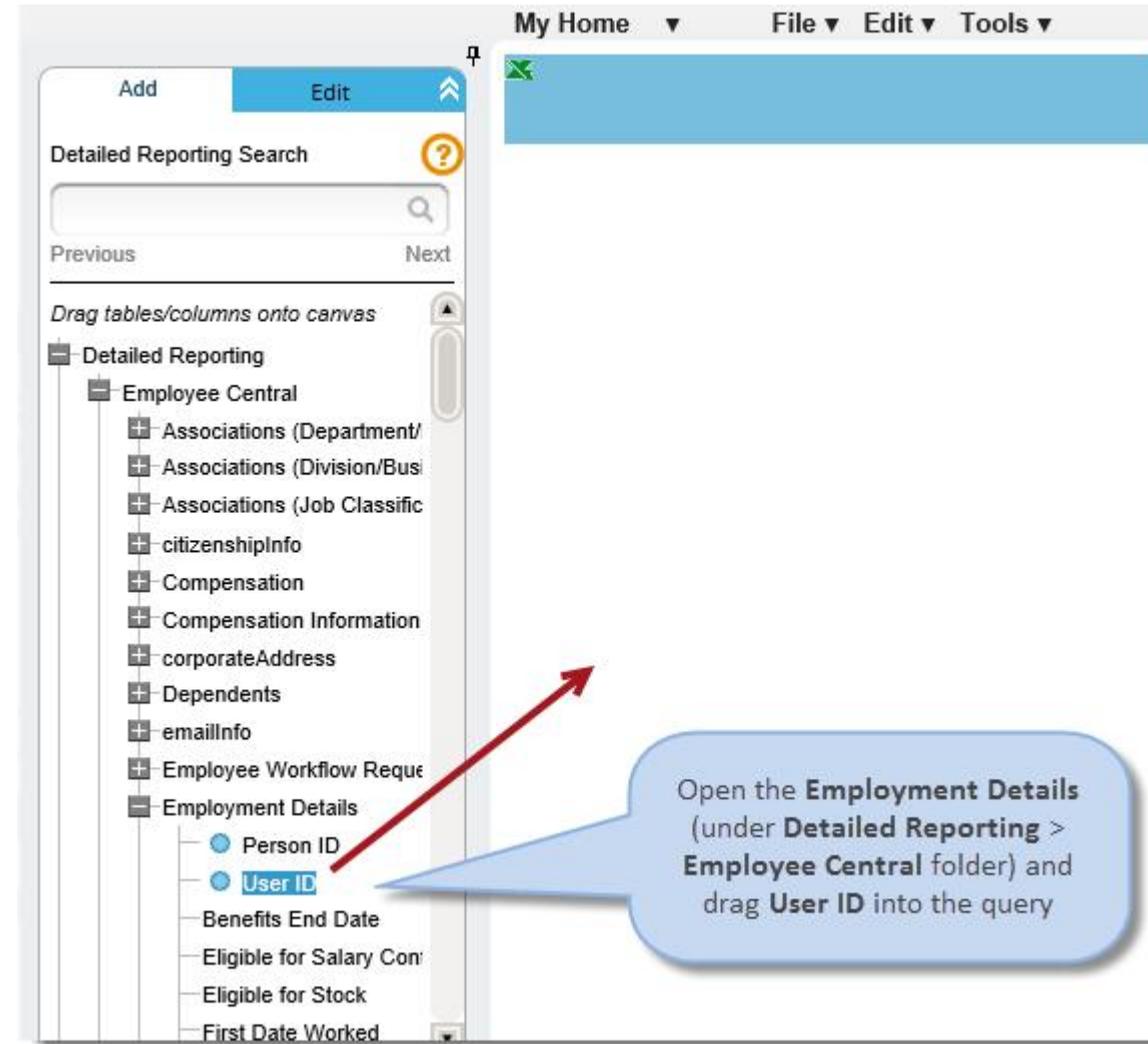
Red arrows point from the blue highlights in the history section to the corresponding blue highlights in the current job information section.

# Begin the query

## Classic UI

To start, we will pull in data from the table which will be the 'anchor' table. Typically this will be the **Employment Details** table for queries that are Change Reporting on employee Job data, or reporting on employee Compensation data.

Open the **Employment Details** table under **Detailed Reporting > Employee Central** and drag on **User ID** (and any other required columns from this table).



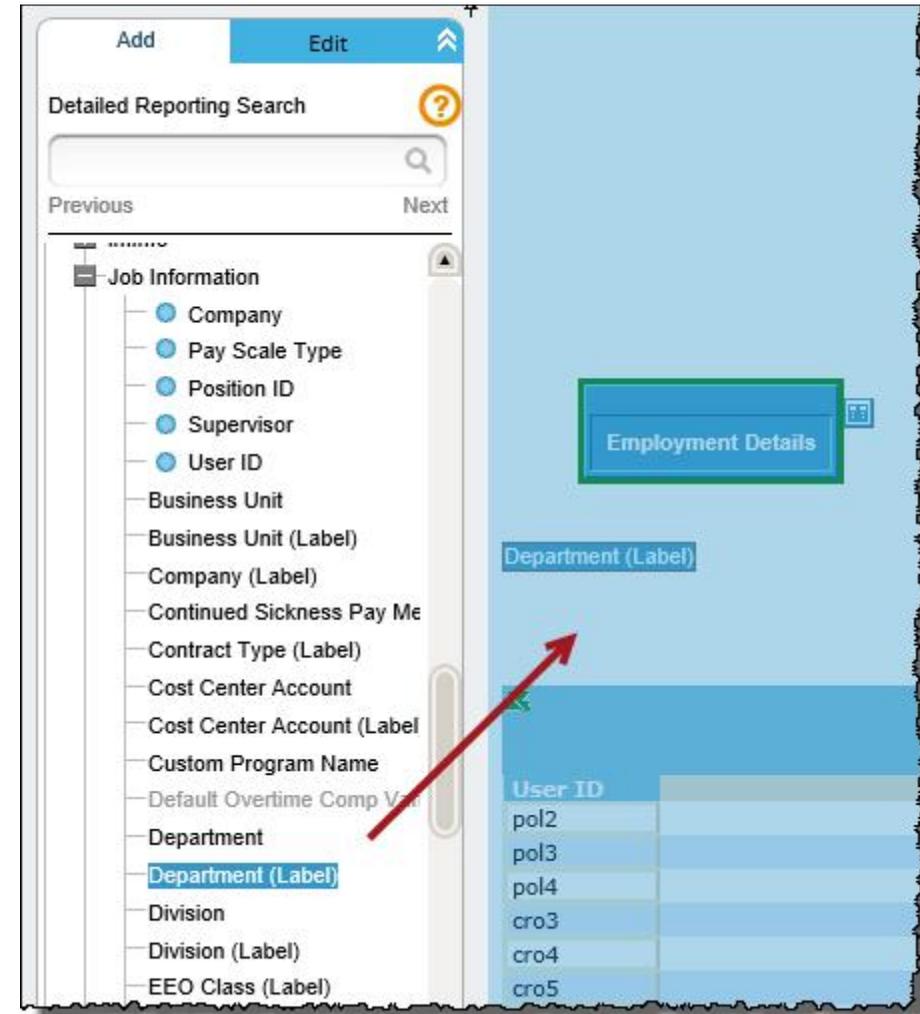
# Pull in the first “change” table

*Classic UI*

Navigate to the **Job Information** table (also under **Detailed Reporting > Employee Central**).

In this example we are looking at changes on the **Department** and **Cost Center** columns.

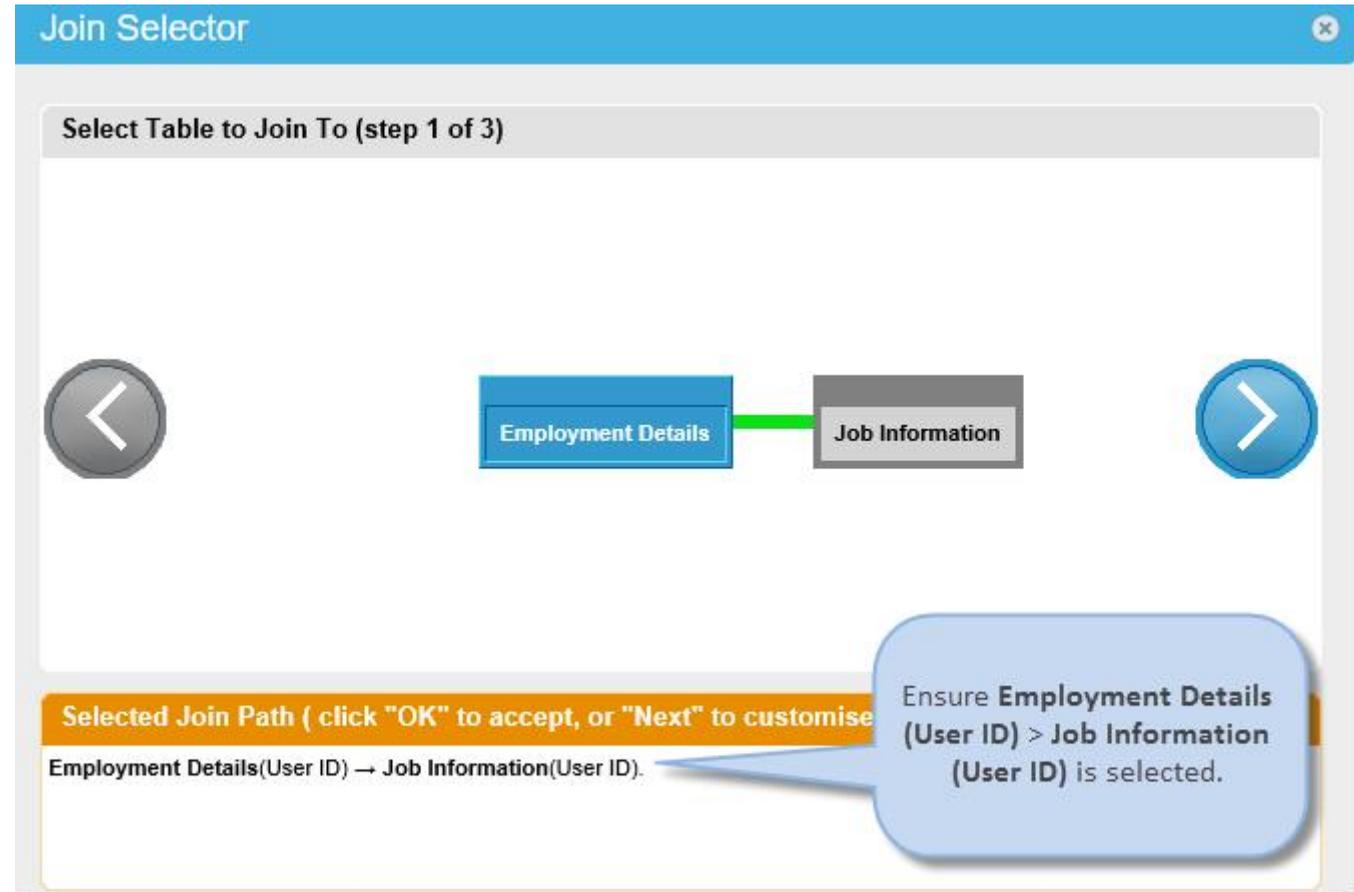
Ensure the **Advanced** view is enabled and pull the **Department (Label)** column onto the canvas to add the **Job Information** table into the query.



# Configure the join for the first “change” table

*Classic UI*

As we are in **Advanced** view, the **Join Selector** dialog will open – ensure the **User ID > User ID** join is selected and click **OK**.



# Configure the columns for the first “change” table

Classic UI

Enable the remaining required columns for the **Job Information** table:

- Effective Start Date
- Effective End Date
- Cost Center (Label)

My Home ▾ Hide Advanced Hide Preview File ▾ Edit ▾ Tools ▾

Add Edit

**Employment Details**  
1 / 25 columns selected

**Job Information**  
4 / 79 columns selected

Enable the remaining columns for the **Job Information** table

Applied Filters Manage Filters

User ID	Department (Label)	Cost Center Account (Label)	Effective Start Date	Effective End Date
VidalV	Sales 01	Corporate	1/1/2014	12/31/9999
BaileyJ	Industries	Corporate	2/1/2013	12/31/9999
310	Emerging Markets	Corporate	4/1/2012	12/31/9999
WanadooF	Sales 01	Corporate	1/1/2014	12/31/9999
FischerC	Sales 01	Corporate	1/1/2014	12/31/9999
SchneiderV	Sales 01	Corporate	1/1/2014	12/31/9999

# Duplicate the first “change” table

*Classic UI*

We now repeat the process of pulling in the **Job Information** table to create a second instance of the table containing the “change” columns.

Return to the column menu and drag the **Department (Label)** column again onto the canvas.

The screenshot displays the SAP Classic UI interface for a 'Detailed Reporting Search'. The left pane shows a column menu with the following items:

- Job Information
  - Company
  - Pay Scale Type
  - Position ID
  - Supervisor
  - User ID
- Business Unit
- Business Unit (Label)
- Company (Label)
- Continued Sickness Pay Me
- Contract Type (Label)
- Cost Center Account
- Cost Center Account (Label)
- Custom Program Name
- Default Overtime Comp Var
- Department
- Department (Label)**
- Division
- Division (Label)
- EEO Class (Label)

The right pane shows a canvas with two tables: 'Employment Details' and 'Job Information'. A red arrow points to the 'Department (Label)' column being added to the table. The table data is as follows:

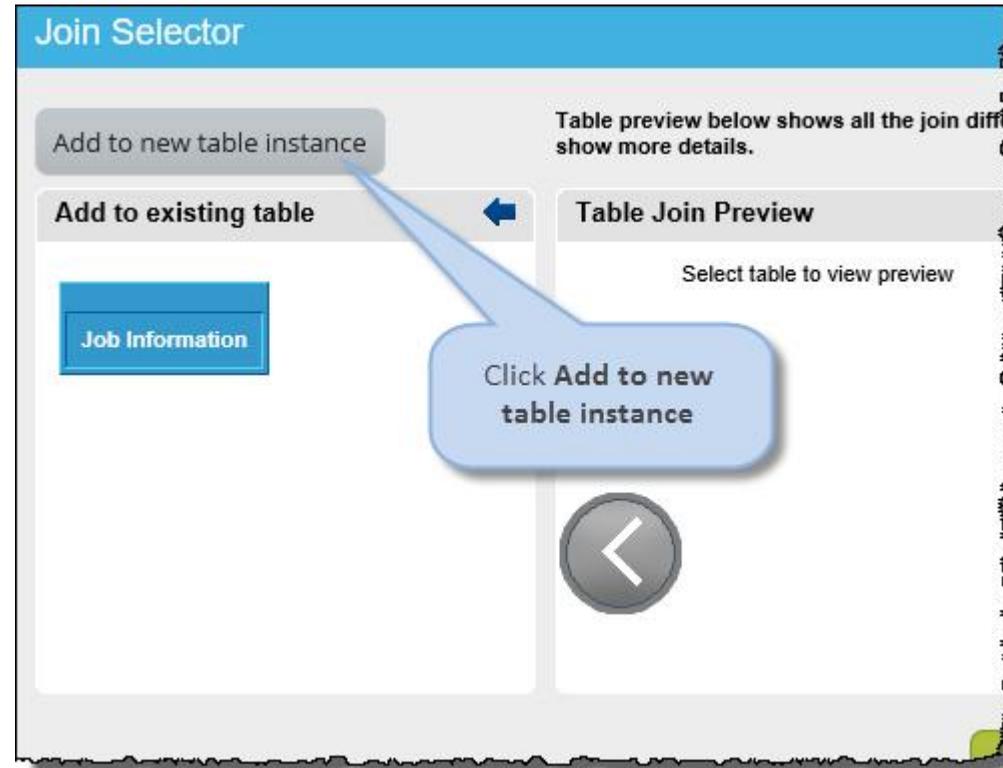
User ID	Department (Label)	Cost Center (Label)
BonnaireK	Client Service	Cor
GieserH	Sales 01	Cor
MitchellM	Sales 01	Cor
BergmannE	Client Service	Cor
VidalV	Sales 01	Cor
BaileyJ	Industries	Cor
310	Emerging Markets	Cor

# Make a new instance (duplicate) of the “change” table

*Classic UI*

When columns from a table that already exists in the query are pulled into the query, you will be offered the choice to add those columns to the existing table – or to create a new instance of the table.

For Change Reporting purposes we need to create a new instance of the **Job Information** table, so in the **Join Selector** dialog click **Add to new table instance**.



# Configure the join for the duplicate “change” table

*Classic UI*

Ensure the same join is configured as for the first change table. Here we will again ensure the User ID > User ID join is selected and click **OK**.

Note the table layout graphic is slightly different here, showing the first **Job Information** table that we have already pulled into the query.

Join Selector

Select Table to Join To (step 1 of 3)

Employment Details

Job Information

Job Information

Ensure Employment Details (User ID) > Job Information (User ID) is selected.

Selected Join Path ( click "OK" to accept, or "Next" to customise )

Employment Details(User ID) → Job Information(User ID).

# Second instance of the “change” table is now created

Classic UI

Another instance of the **Job Information** table is now available in the query, modify it's columns to switch on:

- Effective Start Date
- Effective End Date
- Cost Center (Label)

My Home ▾ Hide Advanced Hide Preview File ▾ Edit ▾ Tools ▾

Add Edit

Employment Details 1 / 25 columns selected

Job Information 4 / 79 columns selected

Job Information (2) 4 / 79 columns selected

Employment Details

Job Information

Job Information (2)

Enable the remaining columns for the Job Information (2) table

User ID	Department (Label)	Cost Center Account (Label)	Effective Start Date	Effective End Date	Department (Label) (2)	Cost Center Account (Label) (2)	Effective Start Date (2)	Effective End Date (2)
VidalV	Sales 01	Corporate	1/1/2014	12/31/9999	Sales 01	Corporate	1/1/2014	12/31/9999
BaileyJ	Industries	Corporate	2/1/2013	12/31/9999	Industries	Corporate	2/1/2013	12/31/9999
310	Emerging Markets	Corporate	4/1/2012	12/31/9999	Emerging Markets	Corporate	4/1/2012	12/31/9999
WanadooF	Sales 01	Corporate	1/1/2014	12/31/9999	Sales 01	Corporate	1/1/2014	12/31/9999
FischerC	Sales 01	Corporate	1/1/2014	12/31/9999	Sales 01	Corporate	1/1/2014	12/31/9999
SchneiderV	Sales 01	Corporate	1/1/2014	12/31/9999	Sales 01	Corporate	1/1/2014	12/31/9999

Applied Filters Manage Filters

# Pull in other tables as required

*Classic UI*

We would also like the **First** and **Last Name** in this query.

Pull these in from the **Personal Information** table, joining to the **Employment Details** table via the **Person** (or **Biographical**) **Info** table on the **Person ID**.

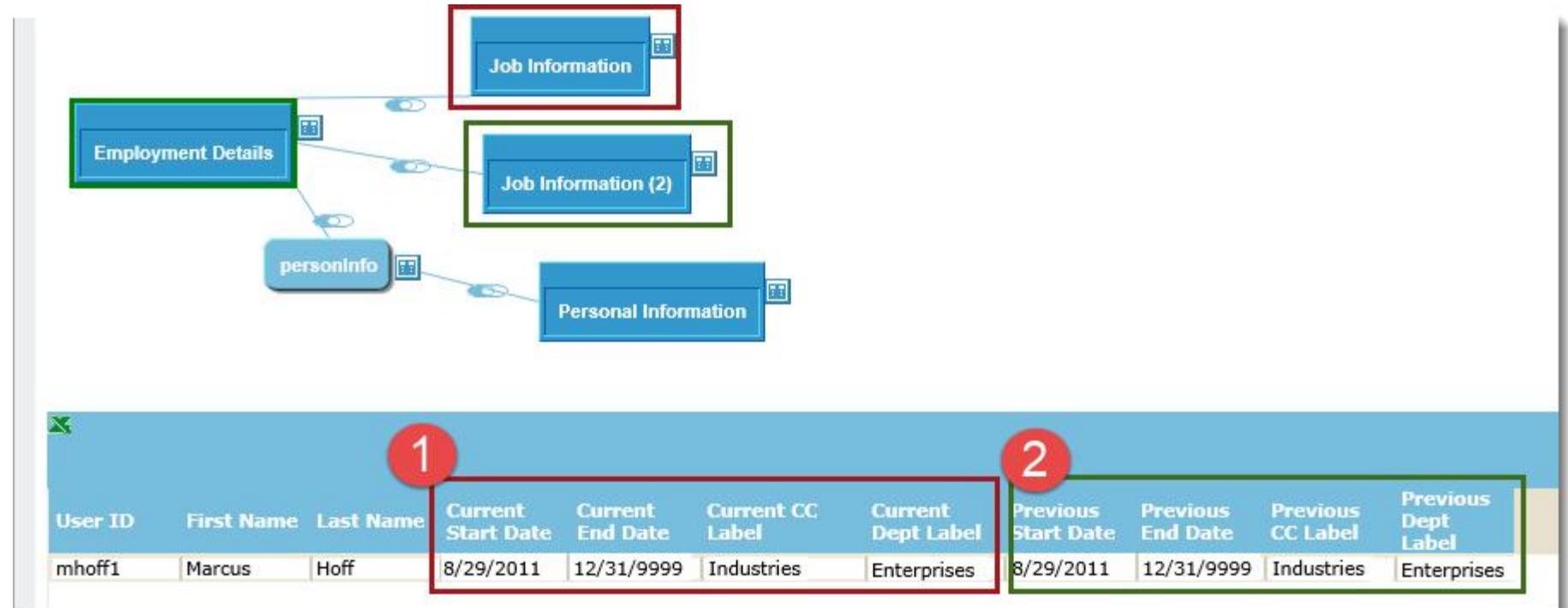
The screenshot displays the SAP Classic UI query configuration interface. On the left, a tree view shows the 'Personal Information' table selected, with 'Person ID' highlighted. A red arrow points from 'Person ID' to the 'First Name' field in the query definition. The right pane shows a diagram of the query structure with tables 'Employment Details', 'Job Information', 'Job Information (2)', 'personinfo', and 'Personal Information' connected by lines. A table with columns 'User ID', 'First Name', 'Last Name', 'Department (Label)', 'Cost Center Account (Label)', 'Effective Start Date', and 'Effective End Date' is shown at the bottom.

# Checkpoint

## Classic UI

We now have a report output that is duplicating the current Department and current Division for each employee. This occurs because both instances of the **Job Information** table defaults to the “current date”. As you can see in the first record, the columns in Group 1 have identical results as the columns in Group 2.

In the next section we will apply date filters to retrieve the proper current & previous results for Department and Cost Center.



The diagram illustrates the SAP report selection screen and the resulting data table. The selection screen shows the following tables and their relationships:

- Employment Details** (green box) is connected to **Job Information** (red box) and **Job Information (2)** (green box).
- Job Information** (red box) is connected to **Personal Information** (blue box).
- Job Information (2)** (green box) is connected to **Personal Information** (blue box).
- personinfo** (blue box) is connected to **Personal Information** (blue box).

The data table below shows the output for user ID mhoff1, Marcus Hoff. The table is divided into two groups of columns, with red and green boxes highlighting the 'Current' and 'Previous' data respectively. Red circles with numbers 1 and 2 are placed above the 'Current' and 'Previous' column groups.

User ID	First Name	Last Name	Current Start Date	Current End Date	Current CC Label	Current Dept Label	Previous Start Date	Previous End Date	Previous CC Label	Previous Dept Label
mhoff1	Marcus	Hoff	8/29/2011	12/31/9999	Industries	Enterprises	8/29/2011	12/31/9999	Industries	Enterprises