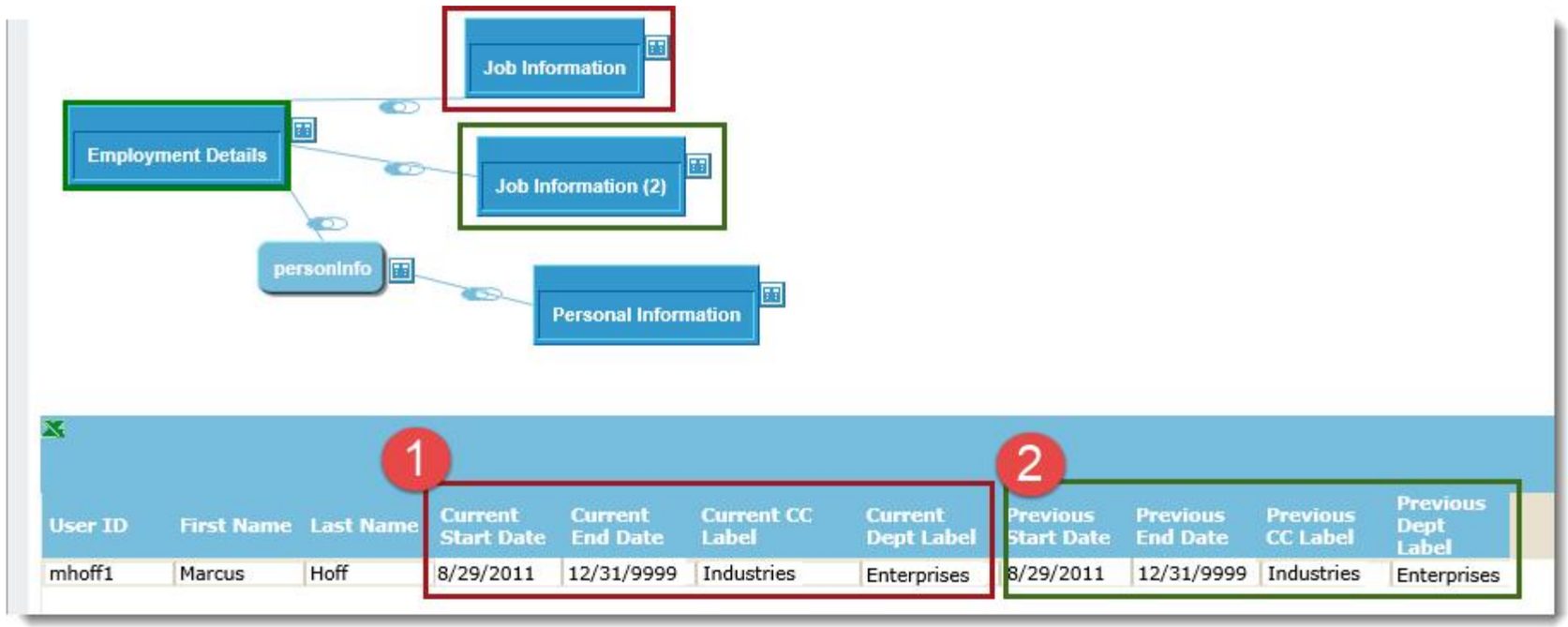
Checkpoint

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.



Finalize the manual Change Reporting query by adding the required filters

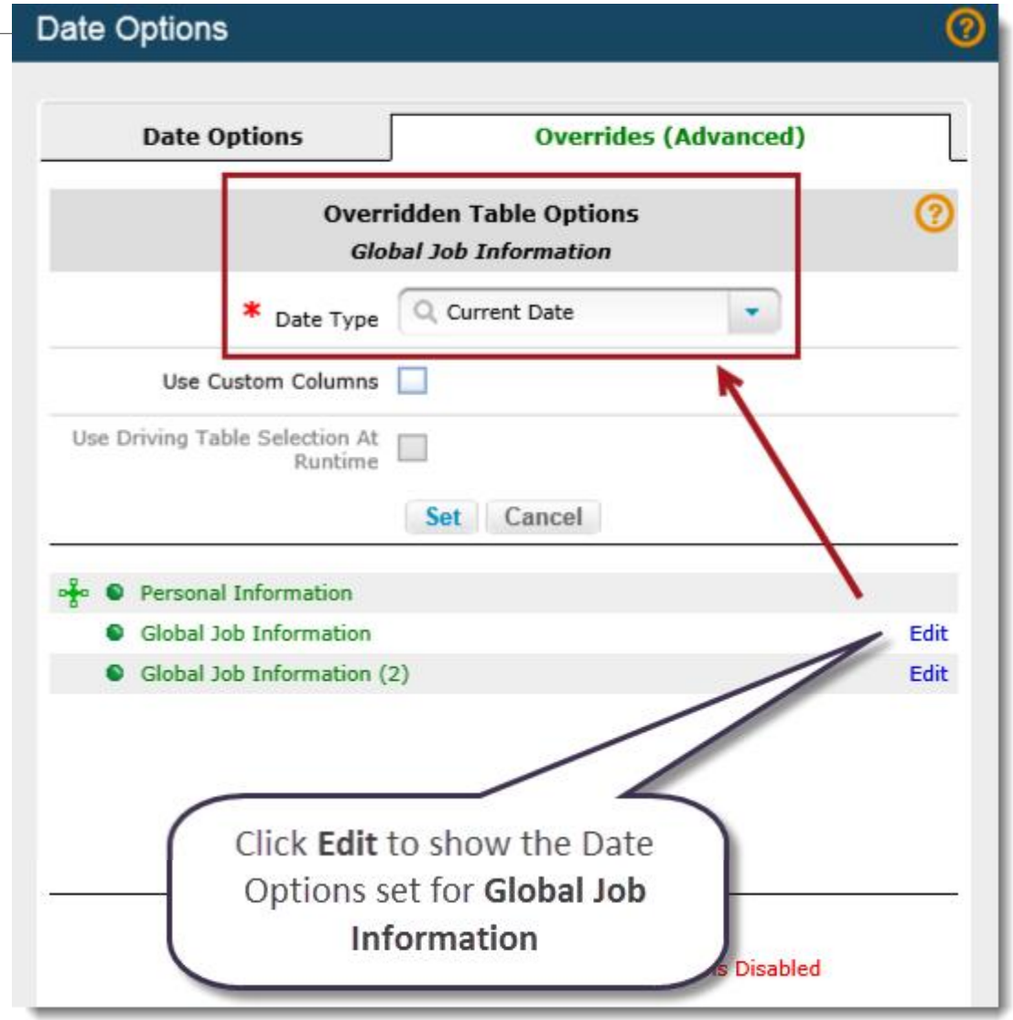
Please note that the following section contains screen shots from the xx UI, however the methodology remains the same when using the “classic” UI.

Apply the Date Filters for Current Values

Open the **Date Options** function and click on the **Overrides (Advanced)** tab.

Click **Edit** on the **Global Job Information** table and note that this table is currently set to **Current Date**. In this example we would like to report on the current Department and current Division from this table – so we will not make any changes here.

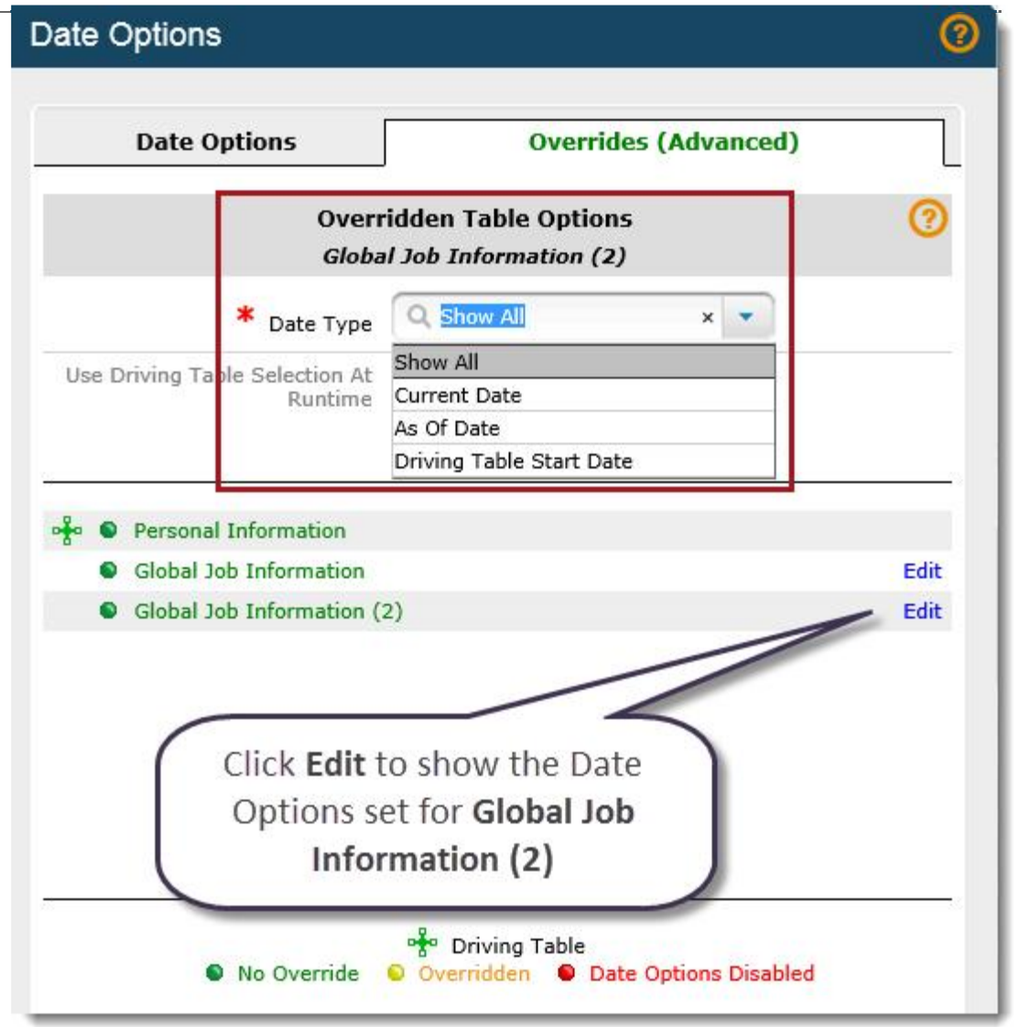
Note that should you wish to report on historical values, here is where you will apply the date or date range relevant to the history you wish to capture.



Apply the Date Filters for Previous Values

Remain in the **Date Options** function on the **Overrides (Advanced)** tab.

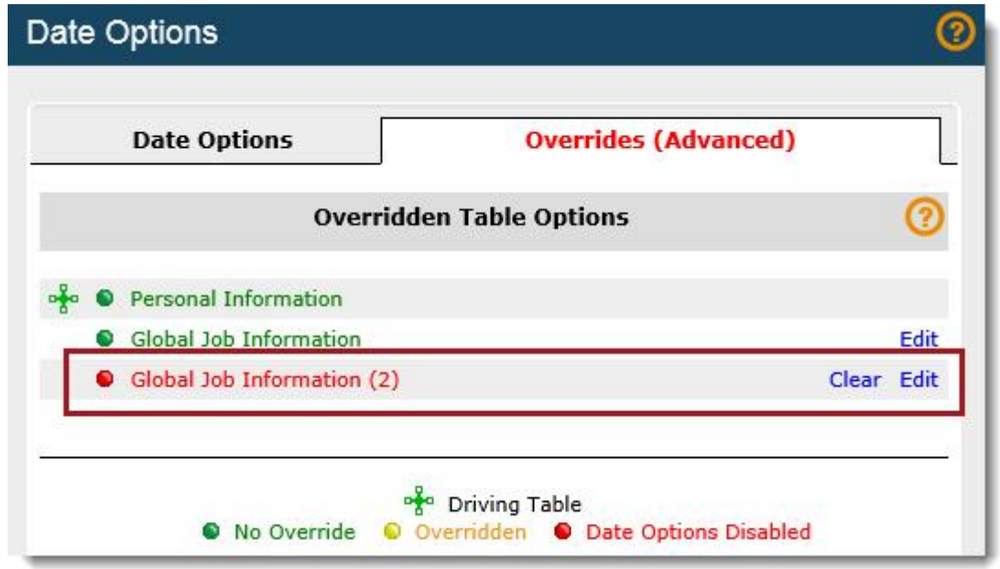
Click **Edit** on the **Global Job Information (2)** table and note that this table is currently set to **Current Date**. Change this setting to **Show All** and click **Set** (note the **Set** button is obscured in this screen shot by the **Date Type** drop down).



Apply the Date Filters for Previous Values (cont)

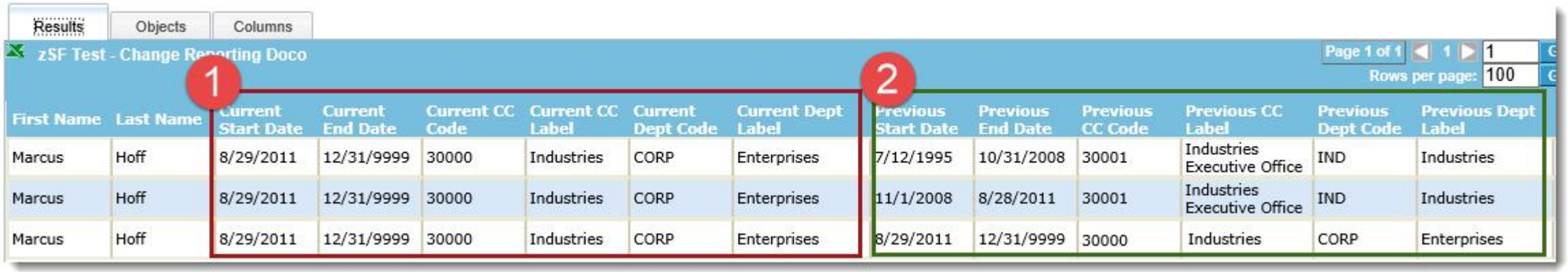
When the **Show All** override for the **Global Job Information (2)** table has been **Set**, the **Overrides (Advanced)** tab will show this table in red, with a **Clear** option next to **Edit**.

Click **Save** to exit the function.



Checkpoint

We now have a set of results that shows the current record (1) against all the previous records (2):



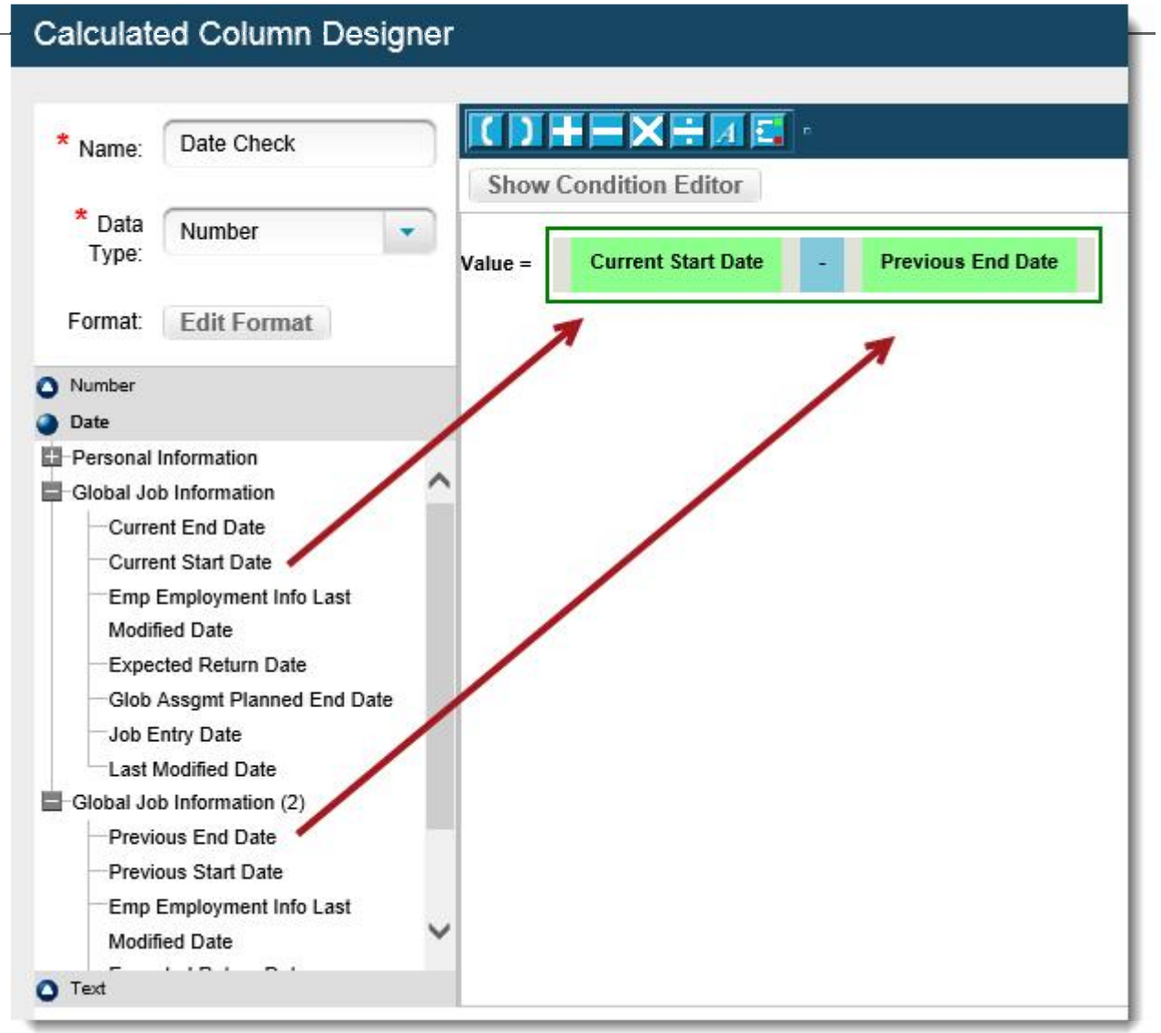
First Name	Last Name	Current Start Date	Current End Date	Current CC Code	Current CC Label	Current Dept Code	Current Dept Label	Previous Start Date	Previous End Date	Previous CC Code	Previous CC Label	Previous Dept Code	Previous Dept Label
Marcus	Hoff	8/29/2011	12/31/9999	30000	Industries	CORP	Enterprises	7/12/1995	10/31/2008	30001	Industries Executive Office	IND	Industries
Marcus	Hoff	8/29/2011	12/31/9999	30000	Industries	CORP	Enterprises	11/1/2008	8/28/2011	30001	Industries Executive Office	IND	Industries
Marcus	Hoff	8/29/2011	12/31/9999	30000	Industries	CORP	Enterprises	8/29/2011	12/31/9999	30000	Industries	CORP	Enterprises

Find ‘Previous’ Record

We now need to identify the record that is “previous” to the current record.

Create a **Calculated Column** which uses the formula: *Current Start Date – Previous End Date*.

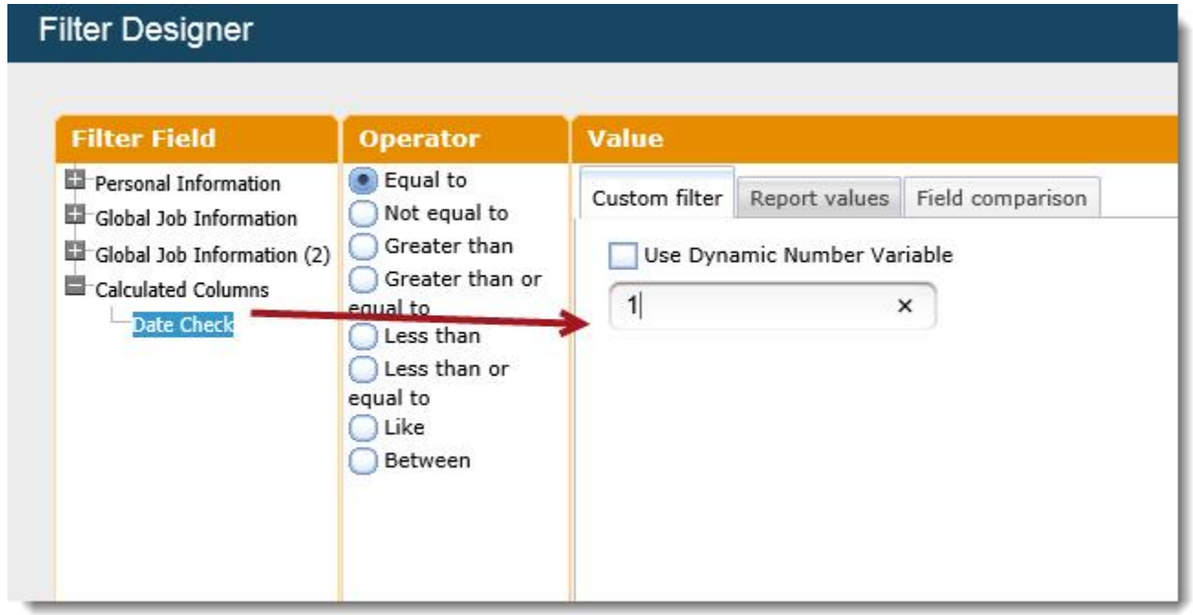
Ensure the **Data Type** is a number and click **OK** to save.



Find ‘Previous’ Record

Set a query filter where the **Calculated Column** = 1.

This will include any records in the query where there is one day between the beginning of the **Current** record and the end of the **Previous** record and ensures that we are only retrieving records that align on the timeline with no gaps.



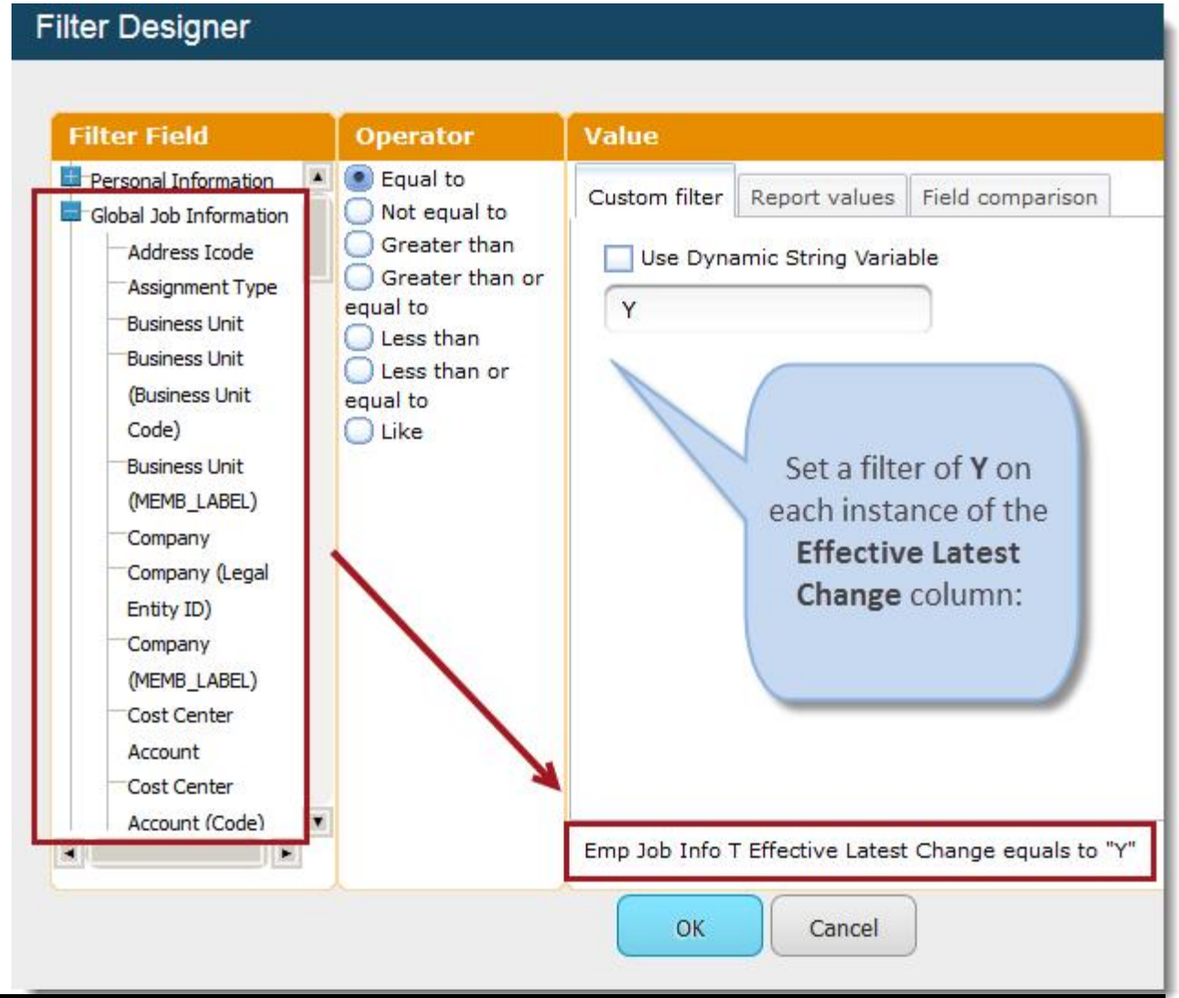
Ensure only final record in a day is captured

New UI

If an employee has had more than one change in a single day, they will appear with multiple records in the results. To ensure we only retrieve one record per employee per timeframe, set a filter on the **Effective Latest Change** column in each of the two table instances.

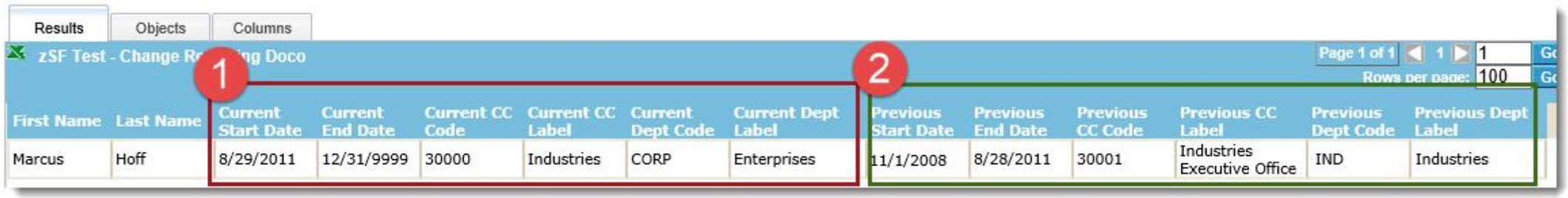
In this example, we are using two instances of the **Global Job Information** table to retrieve changes in columns in this table, so we have set this filter on the **Effective Latest Change** column in each of the instances of this table.

*Please Note! This filter is only applicable for the New UI. The **Effective Latest Change** column is not available in the Classic UI.*



Checkpoint

The results will now show the current record with the previous record (ie: the record dated one day prior to the current record):



Reporting only on employees who have had a change

To more easily show the manual method to creating a change report, the example so far has been filtered on a single employee. If you wish to show a list of employees who (for example) have changed Job Classification the method remains the same with the addition of a filter to only show those employees whose Job Classification changed.

First generate a list of employees current and previous Job Classifications:

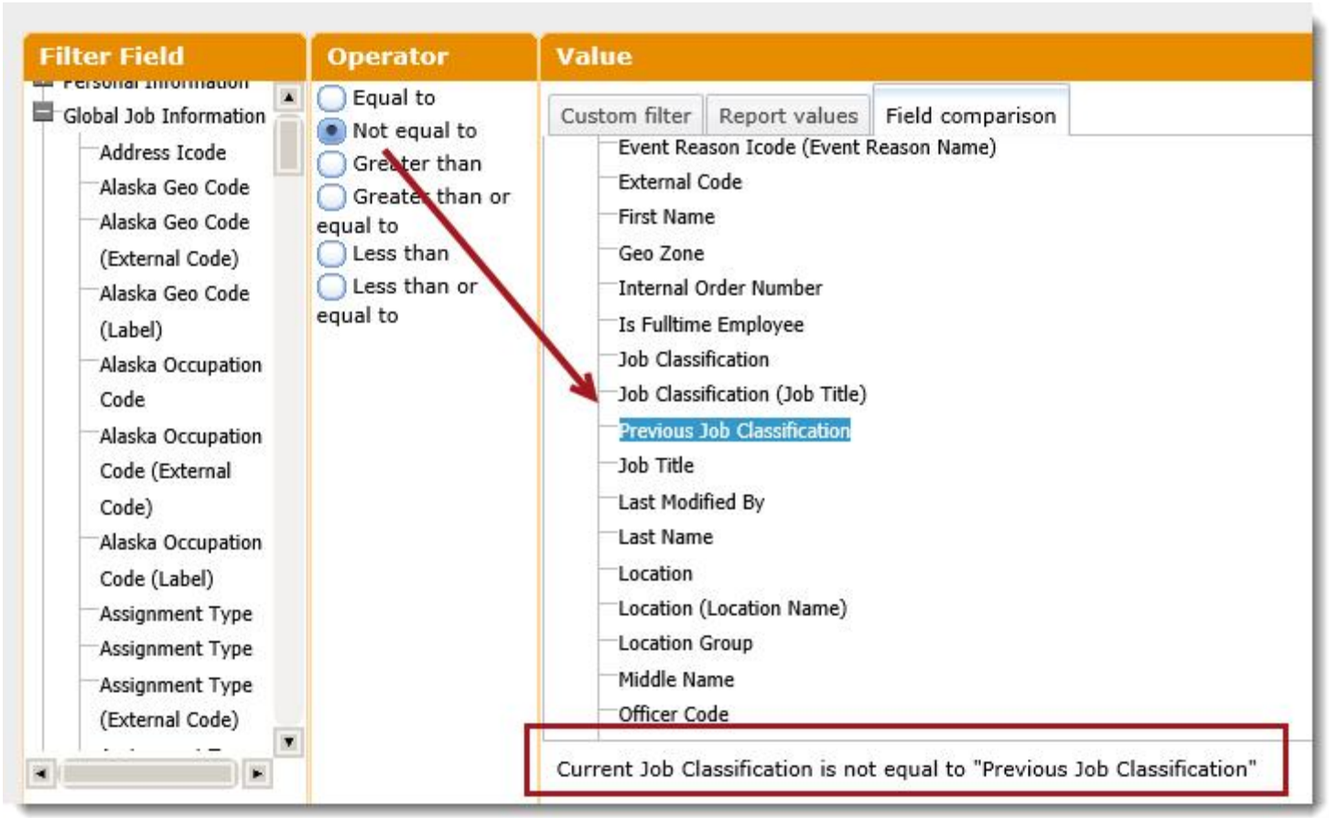
Results | Objects | Columns

zSF Test - Change Reporting Doco

First Name	Last Name	Current Start Date	Current End Date	Current Job Classification	Previous Start Date	Previous End Date	Previous Job Classification
James	Riba	7/11/2011	12/31/9999	Recruiter	4/1/2002	7/10/2011	
Marcus	Hoff	8/29/2011	12/31/9999	Executive Vice-President	4/1/2010	8/28/2011	Executive Vice-President
Grace	Griffin	5/9/2011	12/31/9999	Executive Vice-President	7/1/2008	5/8/2011	Executive Vice-President
Natalie	Cook	7/25/2011	12/31/9999	Executive Vice-President	4/1/2001	7/24/2011	Executive Vice-President
Admin	User	7/30/2011	12/31/9999	Director, Finance	7/26/2011	7/29/2011	Engineering Director
Rick	Bauer	7/11/2011	12/31/9999	Engineering Director	11/1/2010	7/10/2011	Mechanical Engineer
Richard	Maxx	7/11/2011	12/31/9999	Product Manager	5/14/2008	7/10/2011	Executive Vice-President
Carla	Grant	8/31/2009	12/31/9999	General Manager, Industries	6/15/2009	8/30/2009	General Manager, Industries
Brett	Colbert	12/1/2007	12/31/9999	Vice President of Marketing	12/1/2006	11/30/2007	Director, Marketing
Joseph	Selinger	9/28/2011	12/31/9999	Director, Marketing	9/26/2011	9/27/2011	Director, Marketing
Cheryl	Wang	5/7/2011	12/31/9999	Product Manager	10/1/2010	5/6/2011	Product Manager

Add Filter to check for a change

Using the **Field Comparison** option in the **Filter** function – set a filter where Current and Previous Job Classifications do not match:



Reporting only on employees who have had a change

Our list is now filtered to only those employees who had a change between current and previous Job Classifications:

Results | Objects | Columns

zSF Test - Change Reporting Doco

First Name	Last Name	Current Start Date	Current End Date	Current Job Classification	Previous Start Date	Previous End Date	Previous Job Classification
Admin	User	7/30/2011	12/31/9999	Director, Finance	7/26/2011	7/29/2011	Engineering Director
Rick	Bauer	7/11/2011	12/31/9999	Engineering Director	11/1/2010	7/10/2011	Mechanical Engineer
Richard	Maxx	7/11/2011	12/31/9999	Product Manager	5/14/2008	7/10/2011	Executive Vice-President
Brett	Colbert	12/1/2007	12/31/9999	Vice President of Marketing	12/1/2006	11/30/2007	Director, Marketing

Reporting Changes on Multiple Columns

The same method can be used to report on changes across multiple columns by adjusting the filtering as appropriate. Here we are only showing employees who have had a change in both Business Unit **and** Job Classification:

Thank you