

Introduction

Description

There is currently no Business Warehouse report designed specifically for the purpose of displaying employee terminations. However, the **Employee Master Data – History Range** report provides termination data. By following a few simple steps, it is possible to view all employee termination actions recorded within BUworks during whatever date range is specified. This document describes the steps involved in customizing this report to answer the question “during this time period, who in my organization terminated their employment?”

Prerequisites

The user is assumed to have sufficient access to run the **Employee Master Data – History Range** report and is familiar with how to run and understand the report.

Menu Path

BUworks Central portal → Reporting → Human Capital Management (HCM) → Employee Data (Distributed) → Employee Master Data – History Range

Tips and Tricks

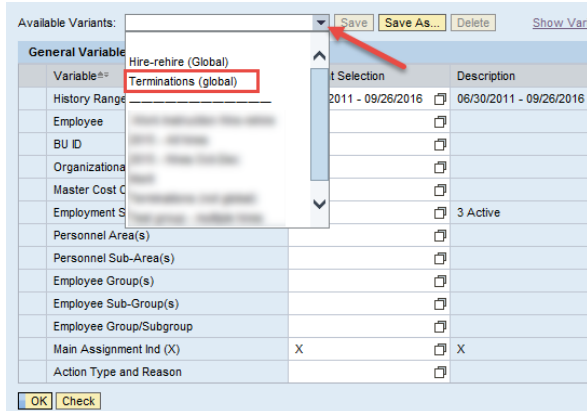
- **Important:** how you choose to customize the report will be a function of what question you are trying to answer. This should be an overriding consideration when running the report and following the steps in this document.
- The **Employee Master Data – History Range** report is described in the [Employee Model Users Guide](#).
- For information about Business Warehouse report Variants, which are used in [Step 1](#) below, refer to the online Help Guide [BW How to - Save and Use a Variant](#).
- It's possible that an employee who terminated returned at a later date during the period under examination. The fact that someone shows up in the results list described in this document does not necessarily mean the employee is no longer employed at the university. This might happen, for example, if the employee was terminated and then was rehired at a later date. The fact that multiple actions for an individual may be included in the report results thus requires careful examination to eliminate data that does not suit the question you are trying to answer. An example of this type of situation is provided in [Step 5](#) of this document.
- Termination Actions for of student employees will be included in report results unless they are explicitly excluded. You may or may not want to filter them out of your results.

Referenced Help Guides

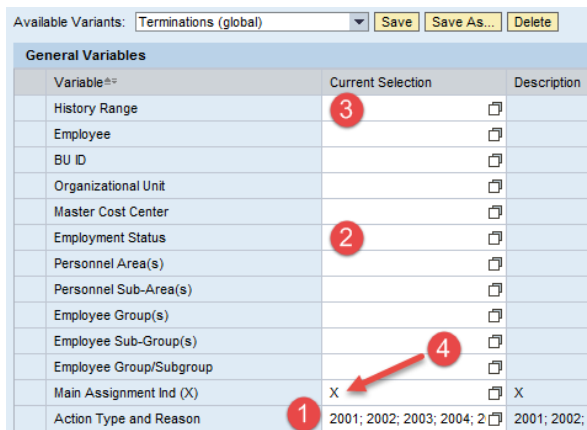
- [Employee Model Users Guide](#)
- [BW How to - Save and Use a Variant](#)
- [BW How to – Filter Report Data](#)
- [BW How to - Save and Use a View](#)

Procedure

Step 1: Run the *Employee Master Data – History Range* report and select the Terminations Variant



In the Variable Entry window, click the **Available Variants** dropdown and select *Terminations (global)*.



Selecting this Variant results in these changes to the variable list:

1. **Action Types** associated with terminations are inserted
2. The default **Employment Status** specification for active employees is removed. Enter status code(s) here if you want to select specific populations, e.g., active employees
3. The default **History Range** is removed. **You must specify a History Range in order to run the report.** History Range selects all record changes that occurred during the specified date range for employees in your Org Unit(s)¹.
4. **Main Assignment Ind:** the default value of “X” is commonly preferred. Refer to [Appendix A](#) for more information about whether or not to modify this variable

Here’s an example of what the resulting report data will look like²:

Emp Name Last	Emp Name First	Emp BU ID	Emp Change from Date	Emp Valid to Date			
			01/01/2014	12/31/9999			
			05/17/2014	08/03/2014			
			08/09/2014	08/24/2014			
			08/25/2014	08/31/2014			
			07/02/2016	12/31/9999			
			07/01/2014	12/31/9999			
			03/23/2016	12/31/9999			
			06/03/2015	12/31/9999			
			03/15/2014	12/31/9999			

Step 2: Remove extraneous Characteristics to focus on Termination Actions

As the highlighted data in the previous figure demonstrates, several changes may have been made to an employee’s record during the period specified at run time. These records may or may not be associated with the Actions under

¹ As described in [Step 4](#), not all record changes are associated with personnel Actions

² Data in this screen shot have been deliberately obscured

examination. To remove *most* records unrelated to terminations³, remove the **Emp Change from Date**⁴ and **Emp Valid to Date** Characteristics. These fields indicate the dates on which changes were made to an employee’s personnel record. However, not all changes – for example, changes to address or telephone number – are counted as HCM Actions.

Step 3: Add Action Characteristics

Emp Name Last	Emp Name First	Emp BU ID	Action Start Date	Action Type	Action Reason
			07/01/2014	20 Termination	05 Appointment Expired
			03/23/2016	20 Termination	05 Appointment Expired
			06/03/2015	20 Termination	05 Appointment Expired
			03/15/2014	20 Termination	05 Appointment Expired
			01/01/2013	20 Termination	05 Appointment Expired
			09/01/2013	20 Termination	05 Appointment Expired
			01/01/2015	20 Termination	05 Appointment Expired
			08/29/2015	20 Termination	05 Appointment Expired
			05/01/2016	20 Termination	05 Appointment Expired
			09/01/2015	20 Termination	05 Appointment Expired
			09/13/2014	20 Termination	05 Appointment Expired
			02/27/2015	20 Termination	05 Appointment Expired

Add the Free Characteristics **Action Start Date**, **Action Type**, and **Action Reason** in the positions shown in this figure.

Action Start Date is the date on which the action is to become effective. The **Action Type** is the general category of the action, and **Action Reason** provides additional detail related to the Type.

Step 4: Filter results to view Actions occurring during the period under examination

When you initially ran the report, you did so by specifying a date range via the **History Range** variable. This variable selects any records associated with changes made during that period, regardless of whether or not those changes were personnel Actions (terminations, hiring, etc.). Examples of changes that are not Actions include phone or address changes.

This means that your initial report results likely contain both termination Actions and non-action changes.

Emp Name Last	Emp Name First	Emp BU ID	Action Start Date	Action Type	Action Reason
			04/30/2015	Back	Appointment Expired
			06/23/2012	Filter	Select Filter Value
			09/01/2013	Change Drilldown	Remove Filter Value
			05/01/2015	Distribute and Export	Variable Screen
			08/06/2011	Save View	Appointment Expired
			07/21/2012	Personalize Web Application	ONU Other Job
			06/06/2015	Properties	ONU Other Job
			07/01/2014	Calculations and Translations	Appointment Expired
			02/01/2012	Documents	Appointment Expired
				Sort Action Start Date	Appointment Expired

To focus only on Actions, filter on the **Action Start Date** Characteristic (this field contains the starting dates of all Actions within your results). Set this date range to agree with the range you specified via the **History Range** variable.

Step 5: Examine results; additional manual manipulation may be necessary

Note that the results shown in the figure below include an employee with two records. Both show termination Actions. Based on the Characteristics currently displayed, it isn’t clear what situation these records describe. The only thing that can be definitively stated is that this employee was terminated on August 29, 2015 and was terminated a second time in the following year. Any additional Action that occurred in the period between these two terminations, e.g., a re-hire Action, would not be included in the results because the report was run in such a way that only terminations were displayed.

When examining your data, it is up to you to decide how you approach situations like this. How you manipulate and interpret your data should be a function of the question you seek to answer.

³ As discussed in Step 5, a few extraneous records may remain after removing these date Characteristics.

⁴ This is the effective date of the change

Emp Name Last	Emp Name First	Emp BU ID	Action Start Date	Action Type	Action Reason
			07/01/2014	20 Termination	05 Appointment Expired
			03/23/2016	20 Termination	05 Appointment Expired
			06/03/2015	20 Termination	05 Appointment Expired
			03/15/2014	20 Termination	05 Appointment Expired
			01/01/2013	20 Termination	05 Appointment Expired
			09/01/2013	20 Termination	05 Appointment Expired
			01/01/2015	20 Termination	05 Appointment Expired
			08/29/2015	20 Termination	05 Appointment Expired
			05/01/2016	20 Termination	05 Appointment Expired
			09/01/2015	20 Termination	05 Appointment Expired
			09/13/2014	20 Termination	05 Appointment Expired
			02/27/2015	20 Termination	05 Appointment Expired

Appendix A: Main Assignment Indicator

Some employees may have more than one assignment. For example, a faculty member serving as a department chair would have an *academic* assignment as well as an *administrative* assignment. Although that person has two assignments, their payroll record is associated only with their main assignment.

Available Variants: Terminations (global) Save Save As... Delete

General Variables		
Variable	Current Selection	Description
History Range		
Employee		
BU ID		
Organizational Unit		
Master Cost Center		
Employment Status		
Personnel Area(s)		
Personnel Sub-Area(s)		
Employee Group(s)		
Employee Sub-Group(s)		
Employee Group/Subgroup		
Main Assignment Ind (X)	X	X
Action Type and Reason	2001; 2002; 2003; 2004; 2	2001; 2002;

A **Main Assignment Ind** value of “X” identifies an employee’s main assignment. The default “X” value for this variable therefore specifies that only the main assignments for employees in your organizational unit will be included in the report results.

Removing the “X” will result in all assignments for all employees being included.

Whether or not you elect to remove the “X” should, as previously mentioned, be determined by the question you are trying to answer.

Results and Next Steps

One next step consideration is whether or not you want to save the report framework you developed using this work instruction. You may or may not elect to save this layout as a View. Refer to the Help Guide [BW How to - Save and Use a View](#) for a review of the steps involved in both saving and using Views.