

Introduction

Description

There is currently no Business Warehouse report designed specifically for the purpose of displaying employee leave. However, the **Employee Master Data – History Range** report provides information related to Leave Actions. By following a few simple steps, it is possible to view all leave 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 began or ended a Leave of Absence?"

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 \rightarrow Reporting \rightarrow Human Capital Management (HCM) \rightarrow Employee Data (Distributed) \rightarrow 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 <u>Employee Model Users Guide</u>.
- For information about Business Warehouse report Variants, which are used in <u>Step 1</u> below, refer to the online Help Guide <u>BW How to Save and Use a Variant</u>.
- It's possible that an employee may have multiple Leave Actions during the period under examination. This fact 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 <u>Step 6</u> of this document.

Referenced Help Guides

- Employee Model Users Guide
- BW How to Save and Use a Variant
- <u>BW How to Filter Report Data</u>
- BW How to Save and Use a View



Procedure

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

General Variable Hire-rehire (Global)		
Variable** LOA (Global)	Current Selection	Description
History Range Terminations (Global)	06/30/2011 - 11/15/2016	06/30/2011 - 11/15/201
Employee	- 0	
BU ID	0	
Organizationa	0	
Master Cost Center	0	
Employment Status	3 🗂	3 Active
Personnel Area(s)	0	
Personnel Sub-Area(s)	0	
Employee Group(s)	0	
Employee Sub-Group(s)	0	
Employee Group/Subgroup	0	
Main Assignment Ind (X)	x Ø	х
Action Type and Reason	1	

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

Available Variants: LOA (Global)	Save Save As Delete								
General Variables									
Variable≜≕	Current Selection	Description							
History Range	2 0								
Employee	ð								
BU ID	đ								
Organizational Unit	Ð								
Master Cost Center	đ								
Employment Status	3 🗗	3 Active							
Personnel Area(s)	đ								
Personnel Sub-Area(s)	đ								
Employee Group(s)	đ								
Employee Sub-Group(s)	3 🗗								
Employee Group/Subgroup									
Main Assignment Ind (X)	х б	Х							
Action Type and Reason	2401; 9200; 9202; 9204; 9(2401; 9200;							
OK Check									

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

- 1. Action Types associated with leaves are inserted
- 2. 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
- 3. **Main Assignment Ind**: the default value of "X" is commonly preferred. Refer to <u>Appendix B</u> for more information about whether or not to modify this variable

Here's an example of data displayed once the report has run²:

Emp Name Last ≞	Emp Name First≞	Emp BU ID ≞	Emp Change from Date ±	Emp Change to Date =	Emp Master Cost Cent	er≜∓
1.00	-	-	04/24/2015	07/05/2015		100.00
			07/06/2015	01/08/2016	10110000 00140	
114.0800A	100-10		04/05/2016	06/30/2016	terrore and	
			07/01/2016	07/04/2016		
			07/05/2016	07/22/2016	second second	-
distance of the local	Carlos .		03/24/2014	05/11/2014	terrore and	1.000
a summer a	-		01/21/2015	06/30/2015		
h Am	In my	han a	P7/P1/2015	07/19/015	100 TO 100 TO 100	The second second

Step 2: Remove extraneous Characteristics to focus on Leave 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 examination. To remove *most* records unrelated to leaves³, remove the **Emp Change from Date** and **Emp Change to**

¹ As described in <u>Step 2</u>, not all record changes are associated with personnel Actions

² Data in this screen shot have been deliberately obscured

³ As discussed in <u>Step 6</u>, some extraneous records may remain after removing these date Characteristics.



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 ≟		tion Type ≞	Action Reason ≟			
10.000	PROFESSION NO.	-	04/13/2015	91	Leave of absence - Paid		Care & Sandy Loading Topology		
			04/24/2015	92	Return from LOA	14	Not loss if hards name house		
Discolation I	100.00		04/05/2016	91	Leave of absence - Paid	-	(in a farmer least lowerlast		
			07/05/2016	92	Return from LOA	100	fee in a local half tool		
and the second s	-		03/24/2014	92	Return from LOA	-	Mainlaw Investment Inst		
e o desire.	-		01/21/2015	91	Leave of absence - Paid	100	(a - Series to all Confider		
-	-	-	02/19/2014	94	Leave of absence - Unpaid	-	Notes (represented		
			09/02/2014	92	Return from LOA	100	Among the same		

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

Refer to <u>Appendix A</u> for definitions of these Free Characteristics.

Step 4: Add LOA Characteristics

Several Free Characteristics associated with Leave Actions are available to provide additional information. In the example below, **LOA Begin Date**, **LOA End Date**, **LOA Expected Return Date** and **LOA Return from Leave** have been added. You may or may not elect to add these Characteristics. Refer to <u>Appendix A</u> for definitions of these Characteristics.

Action Start Date ≞	Acti	on Type =	Acti	on Reason ≞	LOA - Begin Date ≞	LOA - End Date ≞	LOA – Expected Return Date =	LOA Return from Leave =
04/13/2015	91	Leave of absence - Paid		Care & Sandy Lance Tourse	04/13/2015	#	#	#
04/24/2015	92	Return from LOA		Ren Care & Tamin, Same Tourse	#	04/23/2015	#	04/24/2015
04/05/2016	91	Leave of absence - Paid	-	De la farina insella Continue	04/05/2016	#	#	#
07/05/2016	92	Return from LOA	-	Review - Service reads (1998)	#	07/04/2016	#	07/05/2016
03/24/2014	92	Return from LOA	-	And in a locate read locat	#	03/23/2014	#	03/24/2014
01/21/2015	91	Leave of absence - Paid	-	De la Seria Ande Contina	01/21/2015	#	04/15/2015	#
02/19/2014	94	Leave of absence - Unpaid	-	Monten Compensation	02/19/2014	#	09/02/2014	#
09/02/2014	92	Return from LOA	-	Report Francisco	#	09/01/2014	#	09/02/2014

Step 5: 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 records associated with any changes made during that period, regardless of whether or not those changes were personnel Actions (leaves, terminations, hiring, etc.). Examples of changes that are not Actions include phone or address changes.

Your initial report results likely contain both leave Actions and non-action changes.

Action Start Da	to - Action Tuno -	•	Action Reason =
04/13/2015	Filter	7	Select Filter Value
04/24/2015	Change Drilldow n	×	Remove Filter Value
04/05/2016	Distribute and Export	•	Variable Screen
07/05/2016	Save View		24 Rev Dave Service Health Cont.
03/24/2014	Personalize Web Application	•	24 Review Service Half-Lond
01/21/2015	Properties Calculations and Translations	;	24 Decidence Half-Confident
02/19/2014	Documents	•	an Maders Comparisation
09/02/2014	Sort Action Start Date	•	48 Republications

To focus only on leave Actions that occurred during a particular period, filter on the **Action Start Date** Characteristic (this field contains the starting dates of all Actions within your results).

Right-click on the **Action Start Date** column header, slide your cursor down to *Filter*, and then click on *Select Filter Value*



Select values for Action Start Date (ZHCM_IS03F853)																
																-
Show tool: Single values Show view: All																
	Single values															
	~"		Va	lue r	ang	es										~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
	-	• '			[Nov	emb	er	•	20	16					• •
												_				\rightarrow
	•		Nov	emb	er 2	016					Dec	emb	er 2	016		\leq
		Мо	Тu	We	Th	\mathbf{Fr}	Sa	Su		Мо	ти	We	Th	${\rm Fr}$	Sa	Su
	44	31	1	2	3	4	5	6	48	28	29	30	1	2	3	4 <
	45	7	8	9	10	11	12	13	49	5	6	7	8	9	10	11
	46	14	15	16	17	18	19	20	50	12	13	14	15	16	17	18
	47	21	22	23	24	25	26	27	51	19	20	21	22	23	24	25
	48	28	29	30	1	2	3	4	52	26	27	28	29	30	31	1
~~~		Sa	and the		1		~ ~		~~~	-		~~~	~~~~		1-m	1

In the Filter window that is displayed, click the *Show tool* drop-down and select Value Ranges. This will allow you to specify the start and end dates of the period you want to examine.

Show tool: Value ranges Show view: Value ranges	6
Value ranges	Selections
Sign: Include 💌	🗌 Select All 📋 📕
Operator: between	Type Description
From * 1 To: *	
Enter a range for	
Action Start Date: 2 Add Add Remove	
	Change Order V Y
	3 OK Cancel

- Set this date range to agree with the range you specified via the History Range variable (when you ran the report)
- 2. Press the **Add** button to move the date range to the *Selections* column
- 3. Click OK to activate the filter

### Step 6: Examine results; additional manual manipulation may be necessary

Note that the results shown in the figure below include an employee with two records. One of the records indicates the start of a paid Leave of Absence, but it isn't clear what change the second record represents. It will be up to you to determine whether or not a record like this is relevant to the question you are trying to answer. How you manipulate and interpret your data should be a function of the question(s) you are attempting to answer.

Emp Name Last ≞	Emp Name First ≞	Emp BU ID ≞	Action Start Date ±	Act	ion Type ≞	Action Reason ≞
124675	PRODUCT .	-	04/13/2015	91	Leave of absence - Paid	12 Date & and have have
			04/24/2015	92	Return from LOA	10 Review Manky Serve Name
CHURCH ST	100.00	-	04/05/2016	91	Leave of absence - Paid	24 Days Spream Haddy London
			07/05/2016	92	Return from LOA	24 April and Service Health Lond
CONTRACT!	(CRECK)		03/24/2014	92	Return from LOA	24 Review Service Health Long
Distance.	-		01/21/2015	91	Leave of absence - Paid	34 One Service Mode Greatility
100	10.000	-	02/19/2014	94	Leave of absence - Unpaid	An Markey Corporation
			09/02/2014	92	Return from LOA	46 Reservances

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Element Name	Description
Action Start Date	This date is the effective date of the Action
Action Reason	Defines the circumstances which have initiated a personnel action. This information can, for example, be used to evaluate the reasons for employees leaving or being transferred within the company
Action Type	Specifies the type of personnel action initiated. For example: Hire, Transfer, Termination, etc.
LOA Flag	This indicates whether an employee is on leave, has returned from leave, or if there is no record of an LOA on SAP
LOA Type	This describes how an employee is paid while on Leave of Absence
LOA Action Reason	The reason for which the employee is on a Leave of Absence
LOA Begin Date	This field populates if the employee is on Leave of Absence. The populated date indicates the day that the employee's LOA began
LOA End Date	This field populates if the employee has returned from a Leave of Absence. The populated date indicates the day that the employee's LOA ended
LOA Expected Return Date	This is the date that an employee is expected to return from their Leave of Absence. This is not the definitive date that an employee will return. If you are looking for the date that someone has returned from leave, please see the LOA End Date

## Appendix A: Definitions for Characteristics Associated with Actions and Leaves

# Appendix B: 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 <u>main</u> assignment.

Available Variants: Terminations (global)	Save Save As	Delete			
General Variables					
Variable≜≑	Current Selection	Description			
History Range	đ				
Employee	đ				
BU ID	đ				
Organizational Unit	<u>ت</u>				
Master Cost Center	D				
Employment Status	ð				
Personnel Area(s)	đ				
Personnel Sub-Area(s)	D				
Employee Group(s)	0				
Employee Sub-Group(s)	đ				
Employee Group/Subgroup					
Main Assignment Ind (X)	x 🗲 🛛 🗇	х			
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 <u>all</u> assignments for <u>all</u> 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 <u>BW How to - Save and Use</u> <u>a View</u> for a review of the steps involved in both saving and using Views.