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

Tips and Tricks

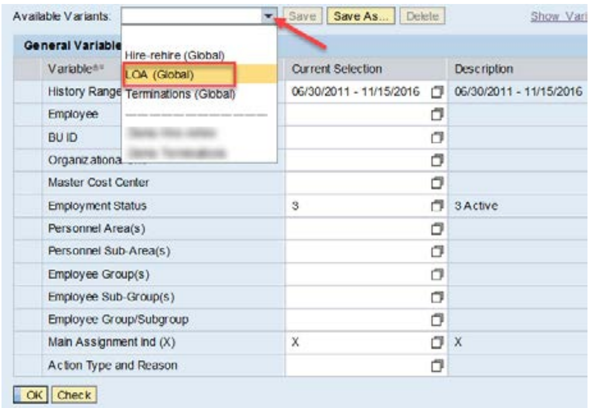
- Important: how you choose to customize the report will be a function of what question you are trying to answer. This should be an overriding consideration when running the report and following the steps in this document.
- The **Employee Master Data – History Range** report is described in the Employee 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 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 Step 6 of this document.

Referenced Help Guides

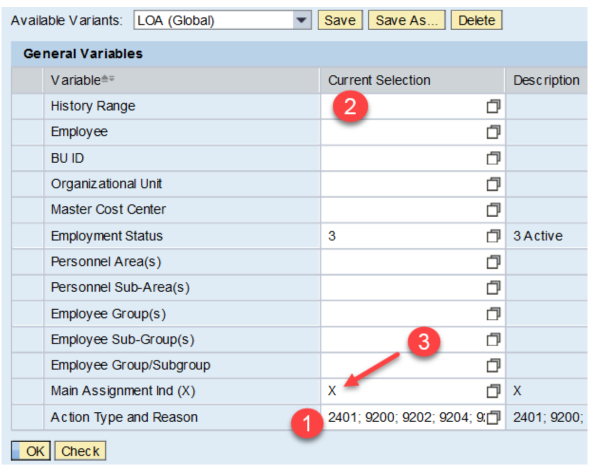
- Employee Model Users Guide
- BW How to - Save and Use a Variant
- BW How to – Filter Report Data
- BW How to - Save and Use a View

Procedure

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



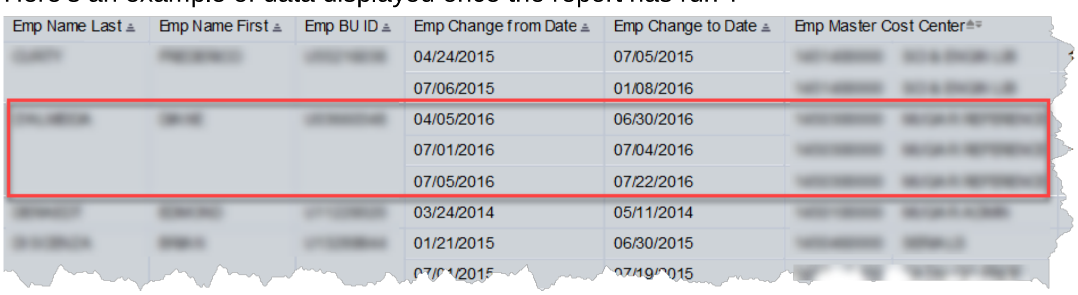
In the Variable Entry window, click the **Available Variants** drop-down and select *LOA (global)*.



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 Appendix B for more information about whether or not to modify this variable

Here's an example of data displayed once the report has run[2]:



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 leaves[3], remove the **Emp Change from Date** and **Emp Change to**

[1] As described in Step 2, not all record changes are associated with personnel Actions

[2] Data in this screen shot have been deliberately obscured

[3] As discussed in Step 6, 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		Action Reason
[illegible]	[illegible]	[illegible]	04/13/2015	91	Leave of absence - Paid	[illegible]
			04/24/2015	92	Return from LOA	[illegible]
[illegible]	[illegible]	[illegible]	04/05/2016	91	Leave of absence - Paid	[illegible]
			07/05/2016	92	Return from LOA	[illegible]
[illegible]	[illegible]	[illegible]	03/24/2014	92	Return from LOA	[illegible]
[illegible]	[illegible]	[illegible]	01/21/2015	91	Leave of absence - Paid	[illegible]
[illegible]	[illegible]	[illegible]	02/19/2014	94	Leave of absence - Unpaid	[illegible]
			09/02/2014	92	Return from LOA	[illegible]

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

Refer to Appendix A for definitions of these Free Characteristics.

Step 4: Add LOA Characteristics

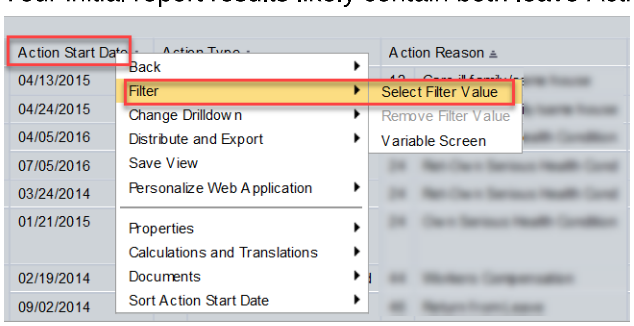
Several Free Characteristics associated with Leave Actions are available to provide additional information. In the example below, **LOA Begin Date**, **LOA End Date**, **LOA Expected Return Date** and **LOA Return from Leave** have been added. You may or may not elect to add these Characteristics. Refer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

Action Start Date	Action Type		Action Reason	LOA - Begin Date	LOA - End Date	LOA – Expected Return Date	LOA Return from Leave
04/13/2015	91	Leave of absence - Paid	[illegible]	04/13/2015	#	#	#
04/24/2015	92	Return from LOA	[illegible]	#	04/23/2015	#	04/24/2015
04/05/2016	91	Leave of absence - Paid	[illegible]	04/05/2016	#	#	#
07/05/2016	92	Return from LOA	[illegible]	#	07/04/2016	#	07/05/2016
03/24/2014	92	Return from LOA	[illegible]	#	03/23/2014	#	03/24/2014
01/21/2015	91	Leave of absence - Paid	[illegible]	01/21/2015	#	04/15/2015	#
02/19/2014	94	Leave of absence - Unpaid	[illegible]	02/19/2014	#	09/02/2014	#
09/02/2014	92	Return from LOA	[illegible]	#	09/01/2014	#	09/02/2014

Step 5: Filter results to view Actions occurring during the period under examination

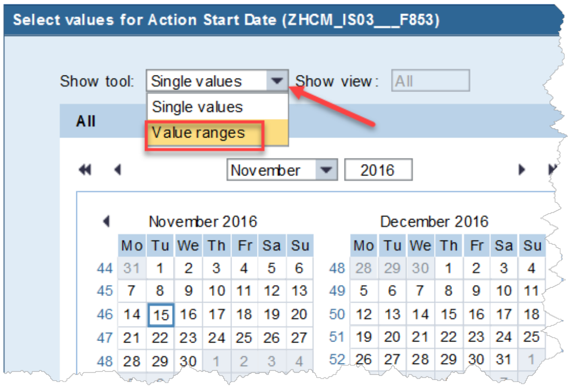
When you initially ran the report, you did so by specifying a date range via the **History Range** variable. This variable selects records associated with any changes made during that period, regardless of whether or not those changes were personnel Actions (leaves, terminations, hiring, etc.). Examples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

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

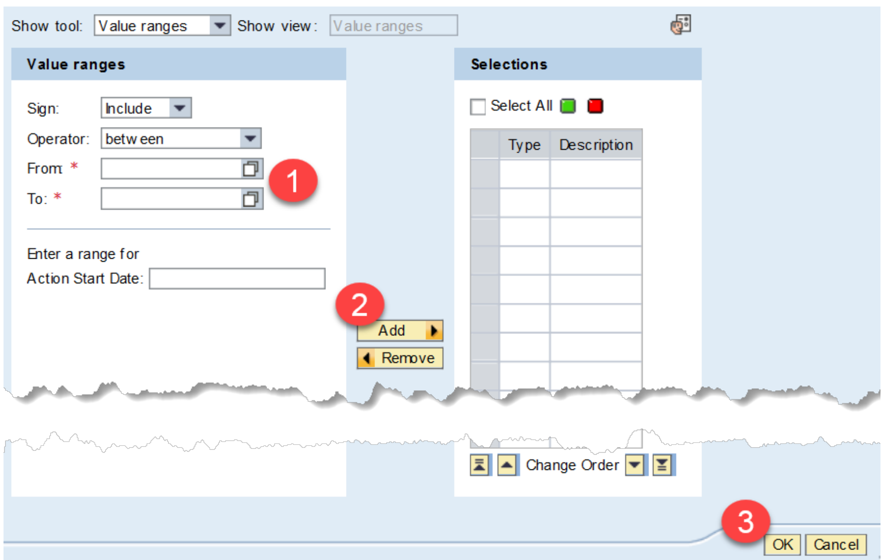


To focus only on leave Actions that occurred during a particular period, filter on the **Action Start Date** Characteristic (this field contains the starting dates of all Actions within your results).

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



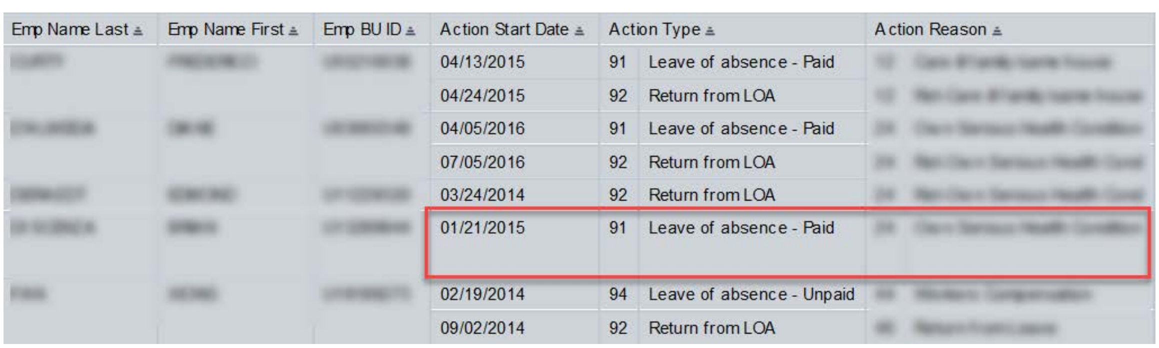
In the Filter window that is displayed, click the *Show tool* drop-down and select Value Ranges. This will allow you to specify the start and end dates of the period you want to examine.



1. 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.



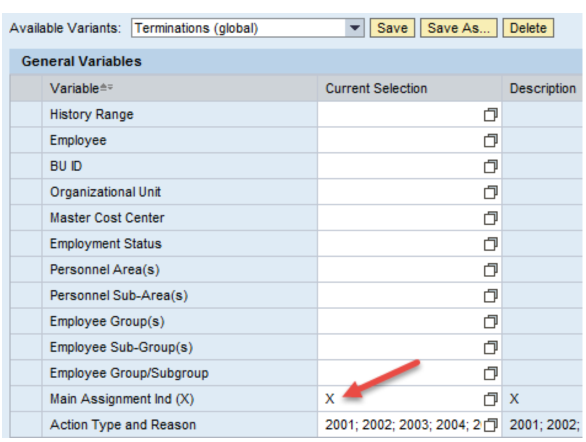
Emp Name Last	Emp Name First	Emp BU ID	Action Start Date	Action Type		Action Reason
[redacted]	[redacted]	[redacted]	04/13/2015	91	Leave of absence - Paid	[redacted]
			04/24/2015	92	Return from LOA	[redacted]
[redacted]	[redacted]	[redacted]	04/05/2016	91	Leave of absence - Paid	[redacted]
			07/05/2016	92	Return from LOA	[redacted]
[redacted]	[redacted]	[redacted]	03/24/2014	92	Return from LOA	[redacted]
[redacted]	[redacted]	[redacted]	01/21/2015	91	Leave of absence - Paid	[redacted]
[redacted]	[redacted]	[redacted]	02/19/2014	94	Leave of absence - Unpaid	[redacted]
			09/02/2014	92	Return from LOA	[redacted]

Appendix A: Definitions for Characteristics Associated with Actions and Leaves

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 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 main assignment.



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.

