Overview/Description
This process describes the steps necessary to add the supervisor’s name to a query.

Prerequisites
First, create a new or edit an existing query adding the desired information. Once complete, run the query to confirm the results are what you expect.

As the final step, follow this job aid to add the supervisor’s name to the query.

Please note, if your query already contains one or more of the records/tables providing information for employees, you may need to add them again as indicated in the instructions in order to include the supervisor’s name.

Instructions
1. Add ‘REPORTS_TO’ to a New or Existing Query

Navigation
NavBar > Navigator > Reporting Tools > Query > Query Manager

Select an Option:
- Find an Existing Query
- Create New Query

! Important
Adding the ‘REPORTS_TO’ field located in the JOB – EE Job History record, provides the position number for the employee’s supervisor.

1.1. Add the JOB-EE Job History Record (Table)

a. Click Records
b. Search By ‘Record Name’, in the begins with field, enter ‘JOB’ and click Search.
c. Locate the ‘JOB – EE Job History’ record, click Add Record.

d. Click OK when the Effective Date message appears.
1.2. Add the ‘REPORTS_TO’ field

Navigate through the record pages to locate and select the ‘REPORTS_TO’ field.

*Hint: To sort your fields on the Query tab in alphabetical order, click the A/Z icon in the top right corner of the page.*

![Query Tab with 'REPORTS_TO' field highlighted](image)

1.3. Join to the POSITION_DATA Record (Table)

   a. Click Records.
   
   b. Search By ‘Record Name’, in the begins with field, enter ‘POSITION’ and click Search.
   
   c. Locate the ‘POSITION_DATA – Position Data’ record, click Join Record.

   ![Join Record to POSITION_DATA](image)
d. In the pop-up box, keep the standard join type and click on the JOB – EE Job History record in the Join Record list.

![Image of pop-up box with job history record selected]

```
Select join type and then record to join with POSITION_DATA - Position Data.

Join Type
- Join to filter and get additional fields (Standard Join)
- Join to get additional fields only (Left outer join)

Join Record
- Join to filter and get additional fields (Standard Join)
- Join to get additional fields only (Left outer join)
```

```
A = JOB - EE Job History
```

![Image of pop-up box with add criteria button highlighted]

e. The next pop-up box will contain the join criteria, click Add Criteria.

```
Auto Join Criteria

Query has detected the join conditions shown below. Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

B: POSITION_NBR - Position Number = A: POSITION_NBR - Position Number
```

![Image of pop-up box with add criteria button highlighted]

f. Click OK when the Effective Date message appears.

Once you join the record, you will be on the Query tab. You will not need to add fields from the POSITION_DATA record.

2. Update Join Established By Adding POSITION_DATA Record

**Important**

The join established by adding the POSITION_DATA record will need to be updated. Instead of joining each record by POSITION_NBR:

<table>
<thead>
<tr>
<th>Alias</th>
<th>Record Name</th>
<th>Field Name</th>
<th>Alias</th>
<th>Record Name</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>POSITION_DATA</td>
<td>POSITION_NBR</td>
<td>A</td>
<td>JOB – EE</td>
<td>POSITION_NBR</td>
</tr>
</tbody>
</table>

You will need to join POSITION_NBR from the POSITIONS_DATA record to REPORTS_TO from the JOB – EE Job History record:

<table>
<thead>
<tr>
<th>Alias</th>
<th>Record Name</th>
<th>Field Name</th>
<th>Alias</th>
<th>Record Name</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>POSITION_DATA</td>
<td>POSITION_NBR</td>
<td>A</td>
<td>JOB – EE</td>
<td>REPORTS_TO</td>
</tr>
</tbody>
</table>
Note: Records (tables) contained in the query are preceded by an alias. This will help you identify the field’s record on additional Query Manager tabs especially when the record is used more than once.

2.1. Navigate to the Criteria Tab

Click on the **Criteria** Tab.

2.2. Select the POSITION_NBR Criteria

a. Locate the join criteria for POSITION_NBR.

b. Click **Edit**.

2.3. Edit Criteria Properties

a. Click on the magnifying glass icon next to Expression 2 for POSITION_NBR – Position Numb.
b. Click **Show Fields** for the JOB record and scroll through the pages to locate and select the ‘REPORTS_TO’ field.

c. Verify the record/field for Expression 2 is correct
d. Click **OK**.
3. Create an OUTER JOIN on JOB – EE to POSITION_DATA

! Important

The first use of the JOB – EE record provides the information for the employee. Creating an outer join from the POSITION_DATA record back to the JOB – EE, provides the information for the supervisor.

3.1. Navigate to the Records Tab

Click on the Records Tab.

3.2. Search for the JOB-EE Job History Record

a. Click Records
b. Search By ‘Record Name’, in the begins with field, enter ‘JOB’ and click Search.
c. Locate the ‘JOB – EE Job History’ record, click Join Record.

d. Click OK when the Effective Date message appears.
e. In the pop-up box, select the join type ‘Join to get additional fields only (Left outer join).’ Click on the POSITION_DATA – Position Data record in the Join Record list.
f. The next pop-up box will contain the join criteria click Add Criteria.

![Add Criteria](image)

- Add Criteria
- Cancel

<table>
<thead>
<tr>
<th>f. The next pop-up box will contain the join criteria click Add Criteria.</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add Criteria" /></td>
</tr>
</tbody>
</table>

- Add Criteria
- Cancel

<table>
<thead>
<tr>
<th>g. Click OK when the Effective Date message appears.</th>
</tr>
</thead>
</table>

4. Update Join Established By Joining JOB – EE Record to POSITION_DATA Record.

4.1. Navigate to the Criteria Tab

Click on the Criteria Tab.

<table>
<thead>
<tr>
<th>Records</th>
<th>Query</th>
<th>Expressions</th>
<th>Prompts</th>
<th>Fields</th>
<th>Criteria</th>
<th>Having</th>
<th>View SQL</th>
<th>Run</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Records" /></td>
<td><img src="image" alt="Query" /></td>
<td><img src="image" alt="Expressions" /></td>
<td><img src="image" alt="Prompts" /></td>
<td><img src="image" alt="Fields" /></td>
<td><img src="image" alt="Criteria" /></td>
<td><img src="image" alt="Having" /></td>
<td><img src="image" alt="View SQL" /></td>
<td><img src="image" alt="Run" /></td>
</tr>
</tbody>
</table>

4.2. Locate the EFFDT Criteria for the Join

The last two criteria rows were added by the join. You will need to edit the criteria for the EFFDT row to pull the most recent effective dated row for the supervisor.

On the EFFDT row, click Edit. As you will see in the screenshot below, there are three (3) EFFDT rows, remember to verify the record alias if in doubt (in this example, ‘C’).

![EFFDT Criteria](image)
4.3. Edit Criteria Properties

a. For **Condition Type**, select ‘Last Eff Date.’

b. After you change the Condition Type, update the field, **This criteria belongs to**, select ‘On clause of outer join C.’ The alias for the criteria will be the same as the alias in Expression 1 (in this example, ‘C’).

c. Click **OK**.

5. Add Criteria To Limit Query Results to Supervisors in an Active Status

5.1. Add Criteria

Click **Add Criteria**.
5.2. Locate and Select the EMPL_STATUS Field

a. Select the magnifying glass icon in the Expression 1 Box.

![Edit Criteria Properties](image)

b. Click Show Fields for the second JOB record (in this example, alias C).

c. Scroll through the pages, locate and select the field ‘EMPL_STATUS.’ Remember to verify the record alias matches the correct JOB – EE record (in this example, ‘C’).
5.3. Select the EMPL_STATUS List Members for Active Employees

a. Edit the Condition Type to ‘in list.’

b. In the Expression 2 box, click the magnifying glass icon for List Members.

c. Click Add Value to select the status types ‘L’, ‘P’, ‘S’, ‘W’, and ‘A.’

d. Click OK.
e. Confirm the List Members in Expression 2

```
Expression 2
Edit List
List Members (L',P',S',W',A')
```

f. After you select the List Members, update the field, **This criteria belongs to**, select 'On clause of outer join C.' The alias for the criteria will be the same as the alias in Expression 1 (in this example, 'C').

g. Click **OK**

6. Add the PERSONAL_DATA Record to include the Supervisor's Name

6.1. Navigate to the Records Tab.

Click on the **Records** Tab.
6.2. Search for the PERSONAL_DATA – PERSONAL_DATA for Rpting Record

a. Click Records.
b. Search By ‘Record Name’, in the begins with field, enter ‘PERSONAL’ and click Search.
c. Locate the ‘PERSONAL_DATA - PERSONAL_DATA for Rpting’ record, click Join Record.

d. In the pop-up box, select the join type ‘Join to get additional fields only (Left outer join).’ Click on the second JOB record, JOB – EE Job History left outer joined with B, record in the Join Record list.

e. The next pop-up box will contain the join criteria, click Add Criteria.
6.3. Add the ‘NAME’ field

Locate and select the ‘NAME’ field.

6.4. Edit the NAME field heading

a. Click on the Fields tab.

b. Locate the Name field (in this example D.Name) and click Edit.

c. Under Heading, select Text.

d. Edit the Heading Text to the heading you would like to see in your query results.

e. Click OK.
6.5. Run the Query to Confirm Results

a. Click the **Run** tab.

b. In addition to your original query fields, you should now see the ‘Reports To’ and ‘Supervisor Name’ fields in your results.