

Add Employee's Supervisor Name to a Query

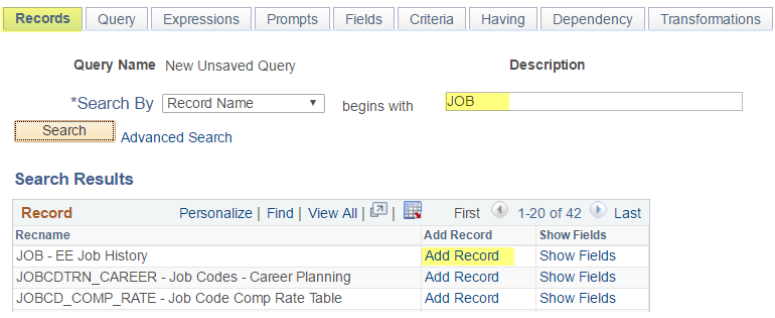
INTRODUCTION

Description	<p>This process describes the steps necessary to add the supervisor's name to a query.</p> <p>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.</p> <p>As the final step, follow this job aid to add the supervisor's name to the query.</p> <p>Please note, if you 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.</p>
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PROCEDURES

SECTION I	Add 'REPORTS_TO' to a New or Existing Query
PATH	<p>Reporting Tools > Query > Query Manager</p> <ul style="list-style-type: none"> • 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.



<p>STEP 1.1</p>	<p>Add the JOB-EE Job History Record (Table)</p> <ul style="list-style-type: none"> • Click Records. • Search By 'Record Name', in the begins with field, enter 'JOB' and click Search. • Locate the 'JOB – EE Job History' record, click Add Record.  <ul style="list-style-type: none"> • Click OK when the Effective Date message appears.
<p>STEP 1.2</p>	<p>Add the 'REPORTS_TO' field</p> <ul style="list-style-type: none"> • Navigate through the record pages to locate and select the 'REPORTS_TO' field. <p><i>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.</i></p>

The screenshot shows the 'Fields' tab in a query editor. The 'Chosen Records' section lists 'A JOB - EE Job History'. Below, the 'Fields' list includes 'REPORTS_TO - Reports To Position Number', which is highlighted. To its right, a 'Join Record' button is visible, along with a dropdown menu showing 'Join POSITION_DATA - Position Data'. Other fields like 'LOCATION - Location Code' and 'LST_ASGN_START_DT - Last Assignment Start Date' are also listed.

STEP 1.3

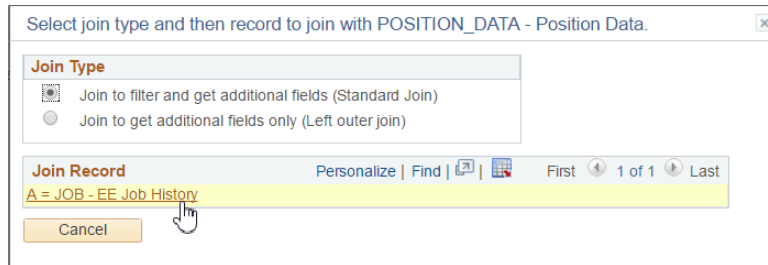
Join to the POSITION_DATA Record (Table)

- Click **Records**.
- **Search By** 'Record Name', in the **begins with** field, enter 'POSITION' and click **Search**.
- Locate the 'POSITION_DATA - Position Data' record, click **Join Record**.

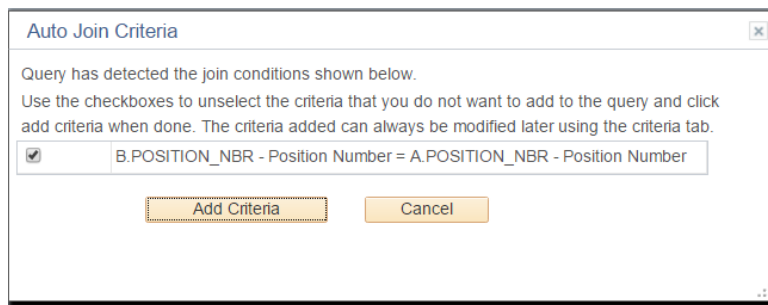
The screenshot shows the 'Records' tab in the query editor. The search criteria are set to '*Search By Record Name' begins with 'POSITION'. The search results table shows 'POSITION_DATA - Position Data' as the first result, with a highlighted 'Join Record' button. Other results include 'POSITION_VIEW - Posn Descr - Employment Titles'. Navigation buttons like 'Save', 'Advanced Search', and 'Return To Search' are also visible.



- In the pop-up box, keep the standard join type and click on the **JOB – EE Job History** record in the Join Record list.










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


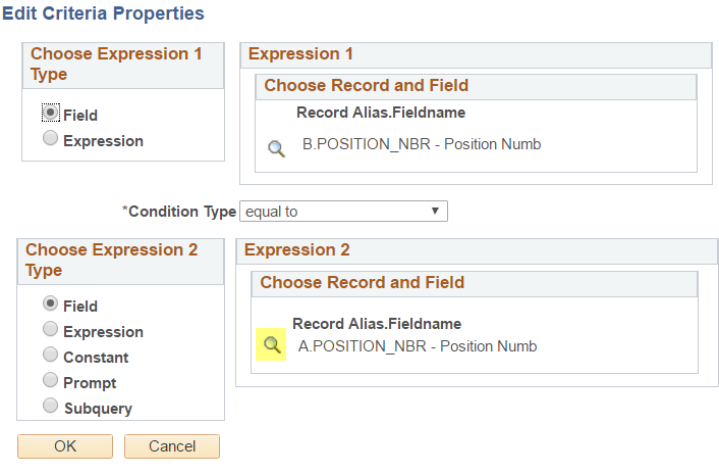


- Click **OK** when the Effective Date message appears. Once you join the record, you will be on the Query tab. You will not need to add fields from the POSITION_DATA record.



SECTION II	Update Join Established By Adding POSITION_DATA Record																																		
Important	<p>The join established by adding the POSITION_DATA record will need to be updated.</p> <p>Instead of joining each record by POSITION_NBR:</p> <table border="0"> <tr> <td>Alias</td> <td>Record Name</td> <td>Field Name</td> <td>=</td> <td>Alias</td> <td>Record Name</td> <td>Field Name</td> </tr> <tr> <td>B</td> <td>POSITION_DATA</td> <td>POSITION_NBR</td> <td></td> <td>A</td> <td>JOB - EE</td> <td>POSITION_NBR</td> </tr> </table> <p>You will need to join POSITION_NBR from the POSITIONS_DATA record to REPORTS_TO from the JOB - EE Job History record:</p> <table border="0"> <tr> <td>Alias</td> <td>Record Name</td> <td>Field Name</td> <td>=</td> <td>Alias</td> <td>Record Name</td> <td>Field Name</td> </tr> <tr> <td>B</td> <td>POSITION_DATA</td> <td>POSITION_NBR</td> <td></td> <td>A</td> <td>JOB - EE</td> <td>REPORTS_TO</td> </tr> </table> <p><i>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.</i></p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Chosen Records</p> <table border="0"> <thead> <tr> <th>Alias</th> <th>Record</th> </tr> </thead> <tbody> <tr> <td> A</td> <td>JOB - EE Job History</td> </tr> <tr> <td> B</td> <td>POSITION_DATA - Position Data</td> </tr> </tbody> </table> </div>	Alias	Record Name	Field Name	=	Alias	Record Name	Field Name	B	POSITION_DATA	POSITION_NBR		A	JOB - EE	POSITION_NBR	Alias	Record Name	Field Name	=	Alias	Record Name	Field Name	B	POSITION_DATA	POSITION_NBR		A	JOB - EE	REPORTS_TO	Alias	Record	 A	JOB - EE Job History	 B	POSITION_DATA - Position Data
Alias	Record Name	Field Name	=	Alias	Record Name	Field Name																													
B	POSITION_DATA	POSITION_NBR		A	JOB - EE	POSITION_NBR																													
Alias	Record Name	Field Name	=	Alias	Record Name	Field Name																													
B	POSITION_DATA	POSITION_NBR		A	JOB - EE	REPORTS_TO																													
Alias	Record																																		
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STEP 2.1	Navigate to the Criteria Tab																																		
	<ul style="list-style-type: none"> Click on the Criteria Tab. 																																		



<p>STEP 2.2</p>	<p>Select the POSITION_NBR Criteria</p> <ul style="list-style-type: none"> • Locate the join criteria for POSITION_NBR. • Click Edit. 
<p>STEP 2.3</p>	<p>Edit Criteria Properties</p> <ul style="list-style-type: none"> • Click on the magnifying glass icon next to Expression 2 for POSITION_NBR – Position Numb. 

- Click **Show Fields** for the JOB record and scroll through the pages to locate and select the 'REPORTS_TO' field.

Select a field

Alias	Record	Record Description	Show Fields
A	JOB	EE Job History	Show Fields
B	POSITION_DATA	Position Data	Show Fields

Select a field

- A.EMPLID - Empl ID
- A.EMPL_RCD - Empl Record
- A.CONTRACT_NUM - Contract Number
- A.JOB_INDICATOR - Job Indicator
- A.WRKS_CNCL_ROLE_CHE - Work Council Role
- A.BENEFIT_SYSTEM - Benefits System
- A.WORK_DAY_HOURS - Number of Hours in a Work Day
- A.REPORTS_TO - Reports To Position Number**
- A.FORCE_PUBLISH - Force Publish
- A.JOB_DATA_SRC_CD - Job Source Code
- A.ESTABID - Establishment ID
- A.SUPV_LVL_ID - Supervisor Level
- A.SETID_SUPV_LVL - Supervisor Level Setid
- A.ABSENCE_SYSTEM_CD - Absence System
- A.POI_TYPE - Person of Interest Type

Cancel

- Verify the record/field for Expression 2 is correct.
- Click **OK**.

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

B.POSITION_NBR - Position Numb

*Condition Type equal to

Choose Expression 2 Type

Field
 Expression
 Constant
 Prompt
 Subquery

Expression 2


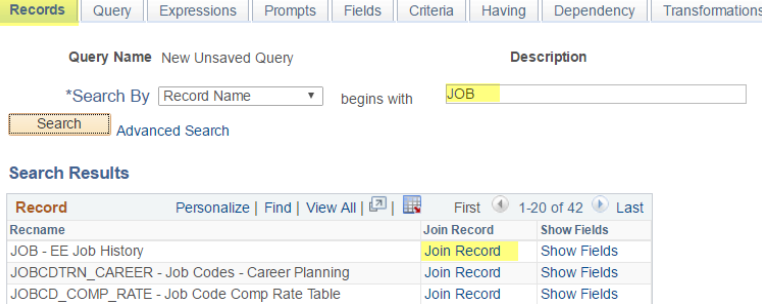
Choose Record and Field

Record Alias.Fieldname

A.REPORTS_TO - Reports To Posi

OK Cancel



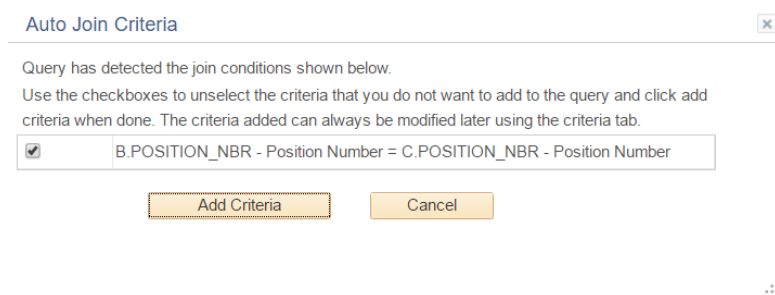
SECTION III	Create an OUTER JOIN on JOB – EE to POSITION_DATA
Important	The first use of the JOB – EE record provides the information for the employee. Creating an outer join from the POSITION_DATA record back to the JOB – EE, provides the information for the supervisor.
STEP 3.1	Navigate to the Records Tab
	<ul style="list-style-type: none"> Click on the Records Tab. 
STEP 3.2	Search for the JOB – EE Job History Record
	<ul style="list-style-type: none"> Click Records. Search By 'Record Name', in the begins with field, enter 'JOB' and click Search. Locate the 'JOB – EE Job History' record, click Join Record.  <ul style="list-style-type: none"> Click OK when the Effective Date message appears.





- 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.



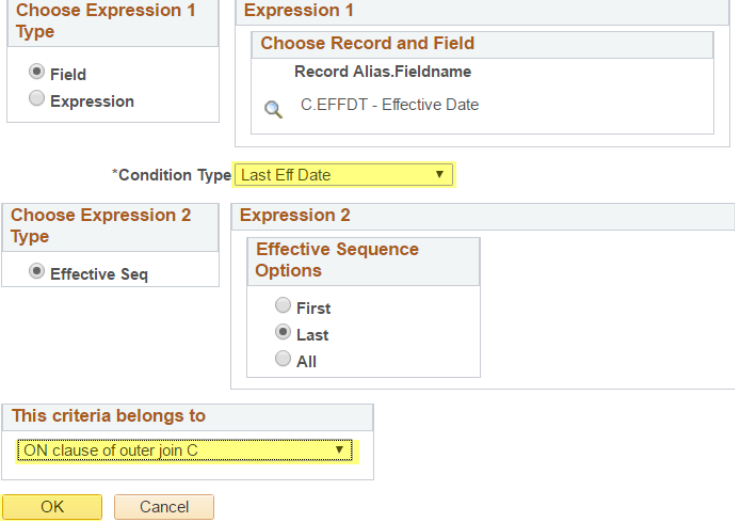
- The next pop-up box will contain the join criteria, click **Add Criteria**.




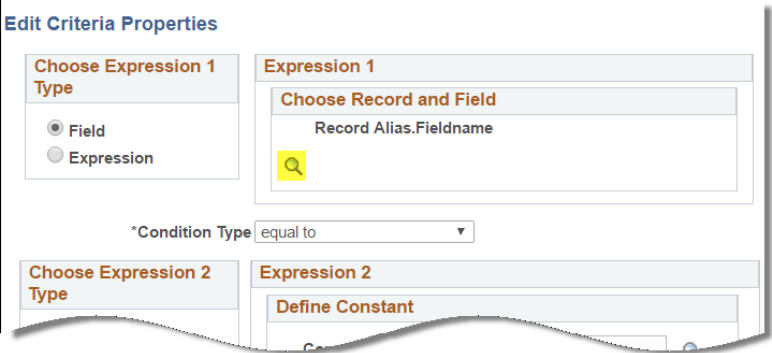
- Click **OK** when the Effective Date message appears.

SECTION IV	Update Join Established By Joining JOB – EE Record to POSITION_DATA Record
STEP 4.1	Navigate to the Criteria Tab
	<ul style="list-style-type: none"> Click on the Criteria Tab. 
STEP 4.2	Locate the EFFDT Criteria for the Join
	<p>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.</p> <ul style="list-style-type: none"> On the EFFDT row, click Edit. As you will see in the screenshot below, there are three EFFDT rows, remember to verify the record alias if in doubt (in this example, 'C'). 



<p>STEP 4.3</p>	<p>Edit Criteria Properties</p>
	<ul style="list-style-type: none"> • For Condition Type, select 'Last Eff Date.' • 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'). • Click OK. <p>Edit Criteria Properties</p>  <p>The screenshot shows the 'Edit Criteria Properties' dialog box. It is divided into several sections:</p> <ul style="list-style-type: none"> Choose Expression 1 Type: Radio buttons for 'Field' (selected) and 'Expression'. Expression 1: A search box for 'Choose Record and Field' showing 'Record Alias.Fieldname' and a search result 'C.EFFDT - Effective Date'. *Condition Type: A dropdown menu with 'Last Eff Date' selected. Choose Expression 2 Type: Radio buttons for 'Effective Seq' (selected). Expression 2: A section for 'Effective Sequence Options' with radio buttons for 'First', 'Last' (selected), and 'All'. This criteria belongs to: A dropdown menu with 'ON clause of outer join C' selected. Buttons: 'OK' and 'Cancel' buttons at the bottom.



SECTION V	Add Criteria To Limit Query Results to Supervisors in an Active Status
STEP 5.1	Add Criteria
	<ul style="list-style-type: none"> Click Add Criteria. 
STEP 5.2	Locate and Select the EMPL_STATUS Field
	<ul style="list-style-type: none"> Select the magnifying glass icon in the Expression 1 box. 



- Click **Show Fields** for the second JOB record (in this example, alias 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').

Alias	Record	Record Description	Show Fields
A	JOB	EE Job History	Show Fields
B	POSITION_DATA	Position Data	Show Fields
C	JOB	EE Job History	Show Fields

Select a field

- C.EMPL_CLASS - Employee Classification
- C.EMPL_CTG - Employee Category
- C.EMPL_CTG_L1 - Employee Subcategory
- C.EMPL_CTG_L2 - Employee Subcategory 2
- C.EMPL_RCD - Empl Record
- C.EMPL_STATUS - Payroll Status**
- C.EMPL_TYPE - Employee Type
- C.ENCUMB_OVERRIDE - Encumbrance Override
- C.ENTRY_DATE - Date Entered

STEP 5.3

Select the EMPL_STATUS List Members for Active Employees

- Edit the Condition Type to 'in list.'
- In the Expression 2 box, click the magnifying glass icon for List Members.

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

C.EMPL_STATUS - Payroll Status

*Condition Type: in list

Choose Expression 2 Type

In List
 Subquery

Expression 2

Edit List

List Members

This criteria belongs to

WHERE clause

OK Cancel



- Click **Add Value** to select the status types 'L', 'P', 'S', 'W', and 'A.'
- Click **OK**.

Edit List

List Members		Personalize	Find	View All	First	1-5 of 5	Last
<input type="checkbox"/>	L						
<input type="checkbox"/>	P						
<input type="checkbox"/>	S						
<input type="checkbox"/>	W						
<input type="checkbox"/>	A						

Value:

Add Prompt

Values				Personalize	Find	View All	First	1-12 of 12	Last
Field Value	Translate Long Name	Translate Short Name	Add Value						
D	Deceased	Deceased	<input type="button" value="Add Value"/>						
L	Leave of Absence	Leave	<input type="button" value="Add Value"/>						
P	Leave With Pay	Leave W/Py	<input type="button" value="Add Value"/>						
Q	Retired With Pay	Ret w/Pay	<input type="button" value="Add Value"/>						
R	Retired	Retired	<input type="button" value="Add Value"/>						
S	Suspended	Suspended	<input type="button" value="Add Value"/>						
T	Terminated	Terminated	<input type="button" value="Add Value"/>						
U	Terminated With Pay	Term w/Pay	<input type="button" value="Add Value"/>						
V	Terminated Pension Pay Out	Term w/Pen	<input type="button" value="Add Value"/>						
W	Short Work Break	Work Break	<input type="button" value="Add Value"/>						
X	Retired-Pension Administration	Ret - PAdm	<input type="button" value="Add Value"/>						
A	Active	Active	<input type="button" value="Add Value"/>						

- Confirm the List Members in Expression 2.

Expression 2

Edit List

List Members ('L','P','S','W','A')



- 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').
- Click **OK**.

Edit Criteria Properties

Choose Expression 1 Type

Field

Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

C.EMPL_STATUS - Payroll Status

*Condition Type in list

Choose Expression 2 Type

In List

Subquery

Expression 2

Edit List


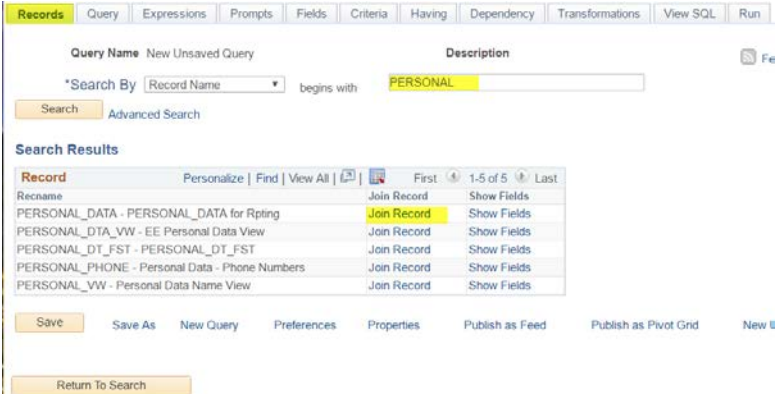
List Members ('L','P','S','W','A')

This criteria belongs to

ON clause of outer join C

OK Cancel



SECTION VI	Add the PERSONAL_DATA Record to Include the Supervisor's Name
STEP 6.1	Navigate to the Records Tab
	<ul style="list-style-type: none"> Click on the Records Tab. 
STEP 6.2	Search for the PERSONAL_DATA - PERSONAL_DATA for Rpting Record
	<ul style="list-style-type: none"> Click Records. Search By 'Record Name', in the begins with field, enter 'PERSONAL' and click Search. Locate the 'PERSONAL_DATA - PERSONAL_DATA for Rpting' record, click Join Record. 



- 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.

Select join type and then record to join with PERSONAL_DATA - PERSONAL_DATA for ✕

Join Type

Join to filter and get additional fields (Standard Join)

Join to get additional fields only (Left outer join)

Join Record Personalize | Find | First 1-3 of 3 Last

A = JOB - EE Job History

B = POSITION_DATA - Position Data

C = JOB - EE Job History left outer joined with B



- 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.

C.EMPLID - Empl ID = D.EMPLID - Empl ID

<p>STEP 6.3</p>	<p>Add the 'NAME' field</p> <ul style="list-style-type: none"> Locate and select the 'NAME' field. 
<p>STEP 6.4</p>	<p>Edit the NAME Field Heading</p> <ul style="list-style-type: none"> Click on the Fields tab. Locate the Name field (in this example D.Name) and click Edit. 



- Under **Heading**, select **Text**.
- Edit the **Heading Text** to the heading you would like to see in your query results.
- Click **OK**.

[Edit Field Properties](#)

Field Name D.NAME - Name

Heading

No Heading RFT Short
 Text RFT Long

Heading Text


*Unique Field Name

Aggregate


None
 Sum
 Count
 Min
 Max
 Average
 Count Distinct

STEP 6.5 **Run the Query to Confirm Results**

- Click the **Run** tab.



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



ID	Empl Record	Pay Status	Reports To	Supervisor Name
1		1 P		

