



B0096 SUPERVISOR RELATIONSHIPS

REPORT DESCRIPTION B0096 | WEB INTELLIGENCE

BOBJ

REPORT DESCRIPTION:

This report lists supervisor positions, and the positions and employees who report to them, for the organizational unit and calendar month/year selected. The employee information, including organizational unit, name, position, job, and salary is also included if the position is filled.

REPORT LOCATION:

OM: Position Data

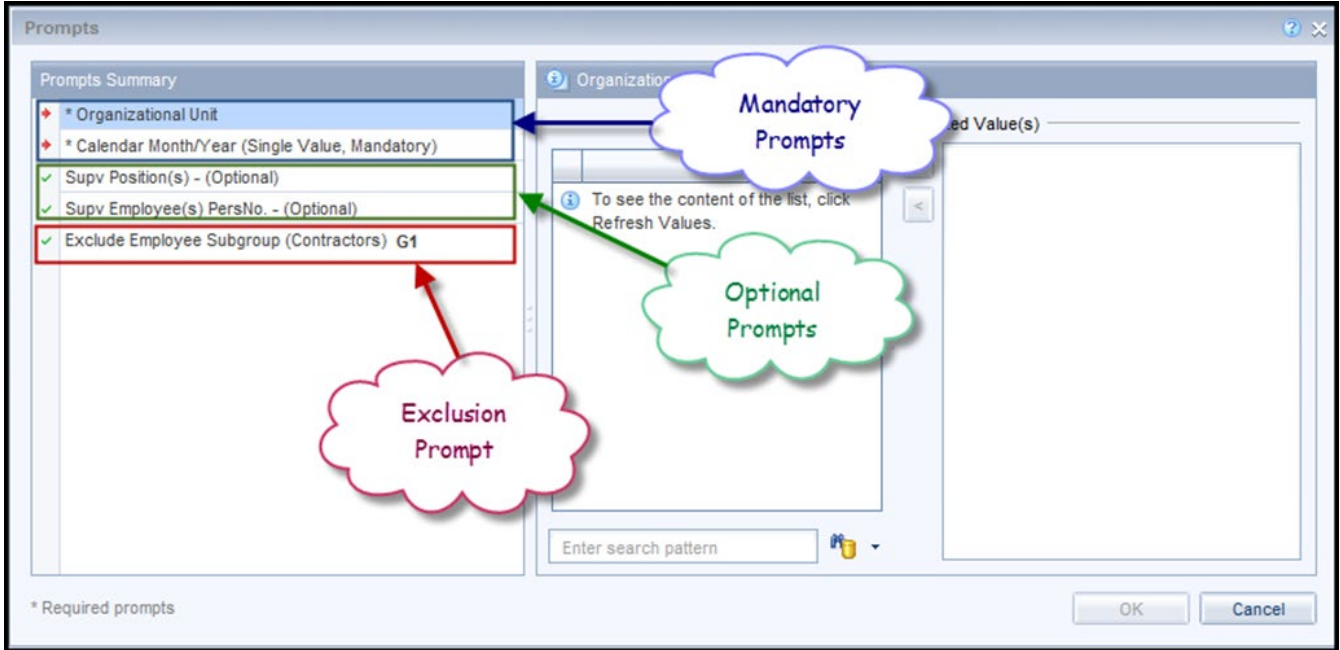
REPORT USES:

- This report can be used to verify supervisor and employee relationships for positions assigned to the supervising position.
- This report can be used to determine if the span of control for an organizational unit is consistent with the standard set for that unit.

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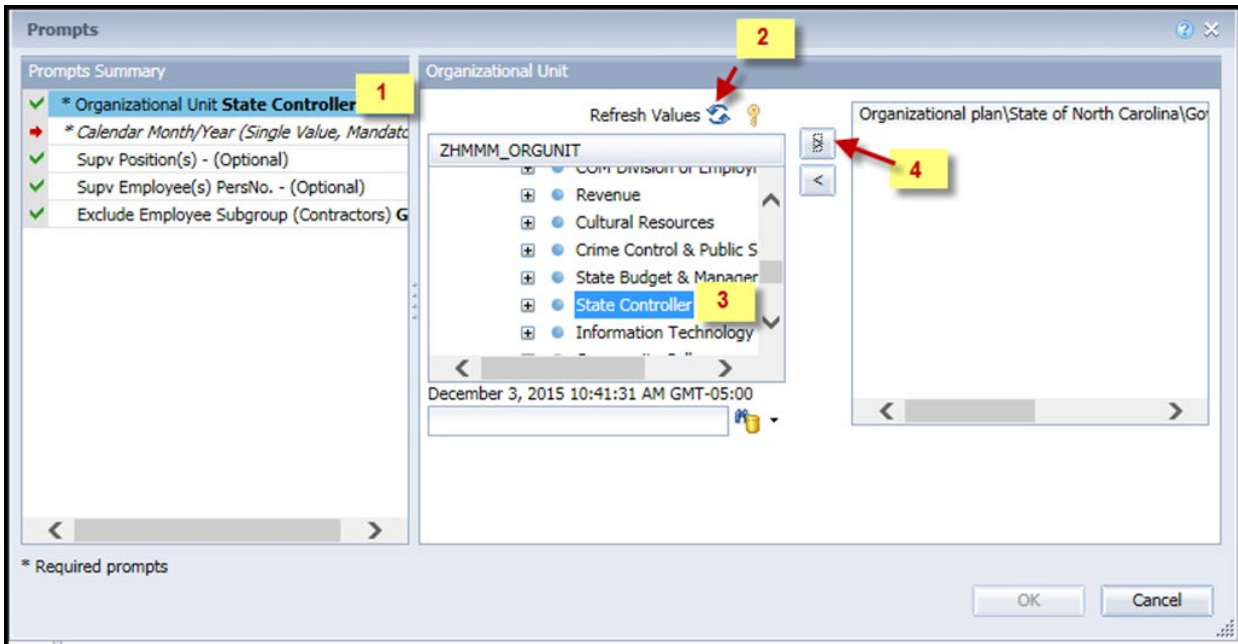
How to Generate this report



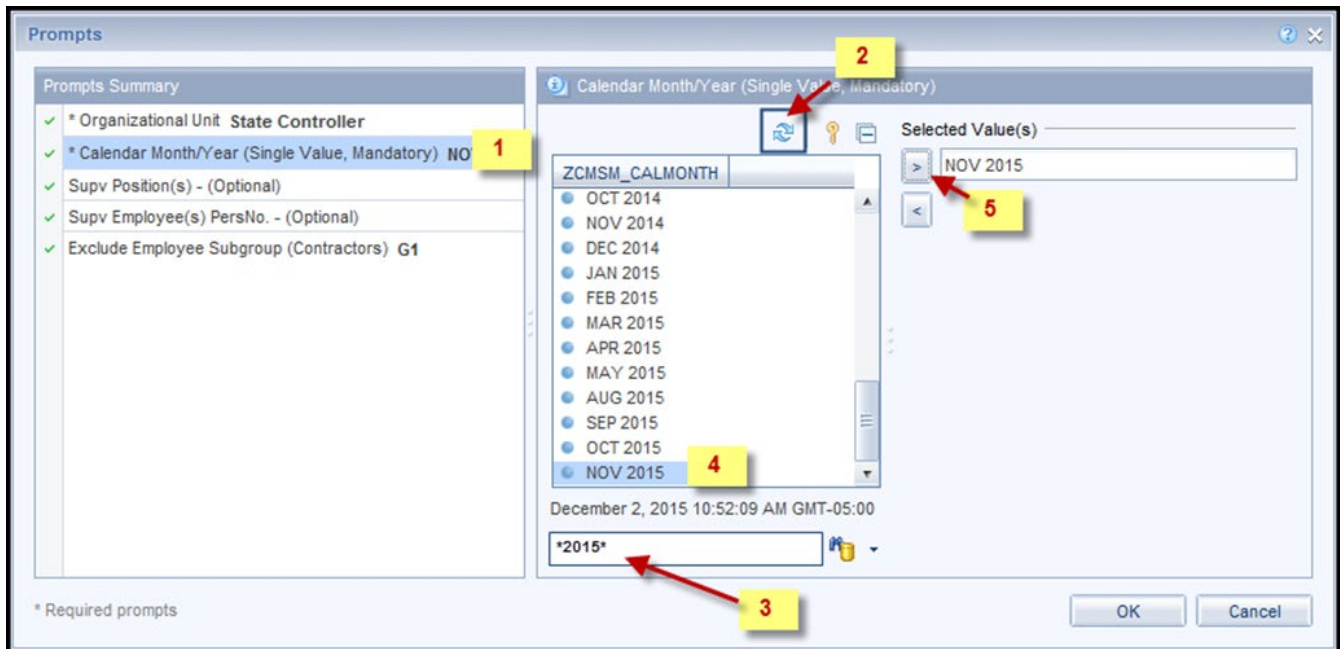
Mandatory Prompts

Mandatory prompts have a red arrow indicator (➔) followed by an asterisk (*) on the left side of the prompts. When a valid value(s) is entered, this indicator will turn into a green check mark (✓).

- ➔ ***Organizational Unit:** To select data for this prompt:
 - Make sure the “Organizational Unit” prompt is selected (1).
 - Click on the “Refresh Values” icon to see the list of Org Units (2).
 - Navigate down to the desired Org Unit (3).
 - Click on the right arrow to add it to the selection box (4).



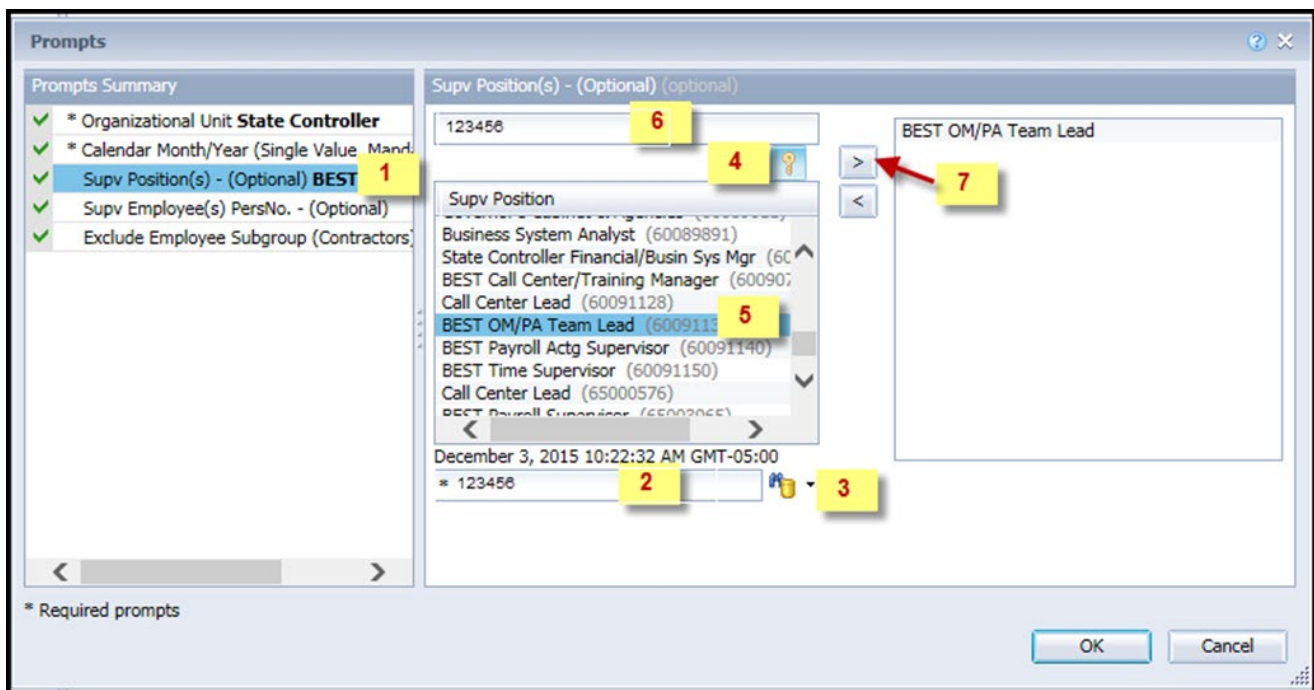
- ***Calendar Month/Year** - To select data for this prompt:
- Make sure you have the Calendar Month/Years prompt selected (1).
 - Click on “Refresh Values” (2).
 - Scroll down to select the value in the search box OR optional - in the search box narrow down the date selection by using the wildcard *YYYY format and press the enter key (3).
 - Click on the date (4).
 - Click on the right arrow button for date (5).



Optional Prompts

Optional prompts are indicated with a green check mark (✓) but are not pre-filled or required. They are used to assist with limiting the amount of data that is retrieved into the body of the report. The optional prompts on this report are:

- ✓ **Supv Position(s)** - To select data for this prompt:
 - Make sure the “Supv Position(s)” prompt selected (1).
 - Enter a search text with an asterisk (*) in the search box to view the list of values for Supervising Position (2).
 - Click on the search icon (3).
 - If you want to see the position numbers listed, click on the key icon (4).
 - Click on the desired supervising position (5).
 - OR if you know the supervising position key or position name already, then you can skip steps 2 through 5 and enter it directly (6).
 - Click on the right arrow to add the supervising position(s) to the selection box (7).

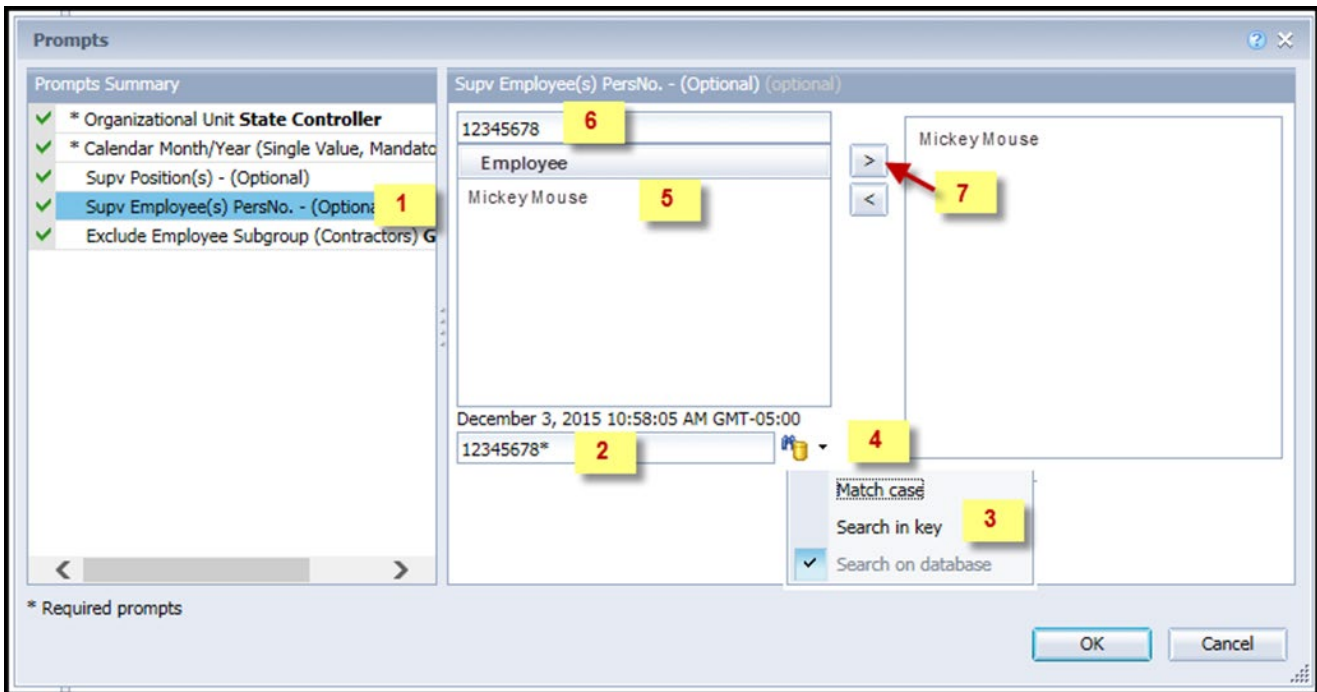


NOTE: Since we have a large number of positions in the system, using only the single wildcard character (*) can be very slow and may result in an error if the search exceeds the system limit. If this happens, you can narrow down your search by using the wildcard with specific text strings such as

- **Assistant**
- *Admin**

If you know the position number, it is best to use the manual entry field (in step 6) to enter your selection.

- ✓ **Supv Employee(s) PersNo. – (Optional):** To select data for this prompt:
 - Make sure the “Supv Employee(s) PersNo. - (Optional)” prompt is selected (1).
 - Enter an employee number in the search box to verify the employee name (2).
 - Click on the search icon drop down arrow and select “Search in key” (3).
 - Then click the search icon (4).
 - Click on the desired employee name (5).
 - OR if you already know the employee number, then you can skip steps 2 through 5 and enter it directly in (6).
 - Then click on the right arrow to add the employee to the selection box (7).



NOTE: Since we have a large number of employees in the system, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If you do not know the employee number and must do a name search, you can narrow down your search by using the wildcard with specific text strings when looking for an employee by name such as:

- Mickey*Mouse*
- *Mouse

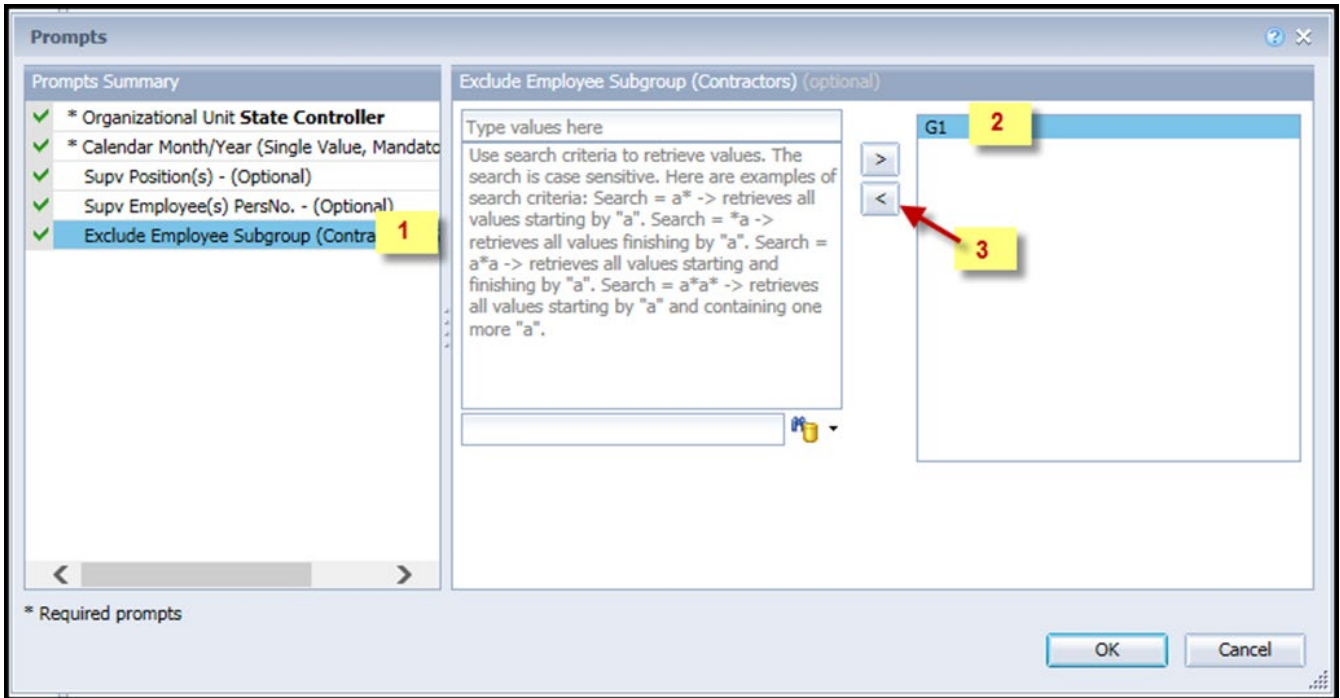
If you know the employee number, it is best to use the manual entry field (in step 6) to enter your selection.

Exclusion Prompts

Exclusion prompts are also indicated with a green check mark (✓) but are generally prefilled with a specific set of data values. They are provided as a way to exclude specified data by default while allowing customers the flexibility of changing them when necessary. Any rows containing data values listed in the exclusion selection box will not be fetched into the report.

By default, the exclusion prompts ensure that the report does not contain any contractor employee data. The data values contained in the selection box can be modified or cleared completely as needed. To include contractors, clear the employee subgroup G1 from the selected values from the prompts.

- ✓ **Exclude Employee Subgroup (Contractors)** – To remove this exclusion:
 - Make sure the Exclude Employee Subgroup prompt is selected (1).
 - Click on the values in the selection box (2).
 - Click on the left arrow (3).



Initial Layout

The report is generated with a list of positions within the org unit selected. The supervisor information displays on the left side of the report, with the positions that report to it listed to the right. This is a sample row from the report, which shows the columns available on the base report:

B0096: Supervisor Relationships as of NOV 2015

Supv Name	Supv Employee	Supv Position	Supv Position Desc	Supv Job	Supv Job Desc	Employee Org Unit	Employee Org Unit Desc
DOE, JANE	1234567	68888888	Administrative Officer	33333333	Administrative Officer III	20000049	Office of the State Controller

Report continued:

Execution Date : 12/2/15								
Employee Name	Employee	Employee Position	Employee Position Desc	Employee Job	Employee Job Desc	Position Count	Supv Salary	Employee Salary
MOUSE, MICKEY	5555555	68888888	Administrative Assistant	34444444	Administrative Assistant II	1.00	44,444	25,000
DUCK, DAFFY	7777777	63333333	Technology Support Specialist	35555555	Technology Support Specialist	1.00	44,444	33,000
LEGHORN, FOGHORN	8888888	62222222	Accountant	36666666	Accountant	1.00	44,444	32,000
#	#	61111111	Business Analyst	37777777	Accountant	1.00	44,444	0
Total Positions for Supervisor DOE, JANE						4.00		

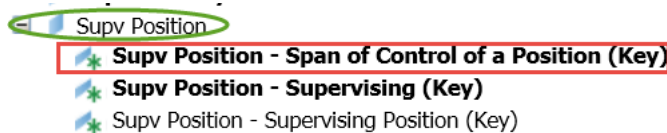
Available Objects

This is a list of the available objects that can be added to the report, once in Design mode:

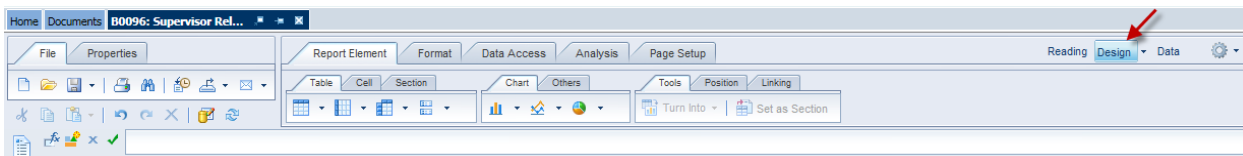
- [-] B0096: Supervisor Relationships
 - [+] Employee
 - [+] Employee Group
 - [+] Employee Name
 - [+] Employee Subgroup
 - [+] Ethnic Origin
 - [+] Gender
 - [+] Job
 - [+] Job Pay Area
 - [+] Job Pay Group
 - [+] Job Pay Level
 - [+] Job Pay Type
 - [+] Org Unit
 - [+] Pos City
 - [+] Pos County
 - [+] Position
 - [+] Pos Pay Area
 - [+] Pos Pay Group
 - [+] Pos Pay Level
 - [+] Pos Pay Type
 - [+] Pos Personnel Area
 - [+] State
 - [+] Supv Employee
 - [+] Supv Ethnic Origin
 - [+] Supv Gender
 - [+] Supv Job
 - [+] Supv Name
 - [+] Supv Pos City
 - [+] Supv Position
 - [+] Employee Salary
 - [+] Position Count
 - [+] Supv Salary
 - [+] Variables

Special Report Considerations/Features

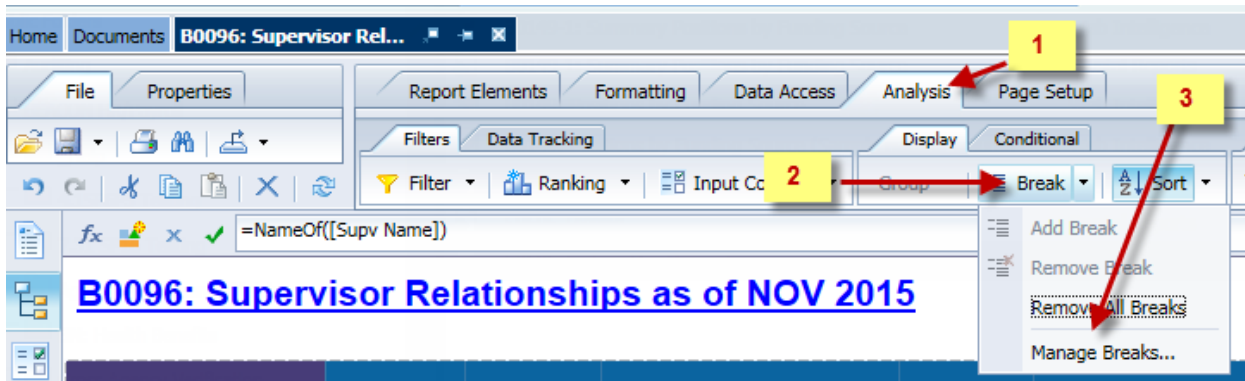
- Vacant positions are identified by an unassigned employee or supervising employee (#) for the position.
- Positions assigned to the Contractor employee subgroup are excluded from this report by default. This can be cleared in the prompt screen and show the contractors in the report.
- **Field/Home Based** indicator is available from Position attributes (expanded list) in Available Objects.
- Report shows **Span of Control of a supervisor or a higher position** when the ‘**Span of Control of a Position (Key)**’ is dragged from Available Objects to the report from ‘**Supv Position**’



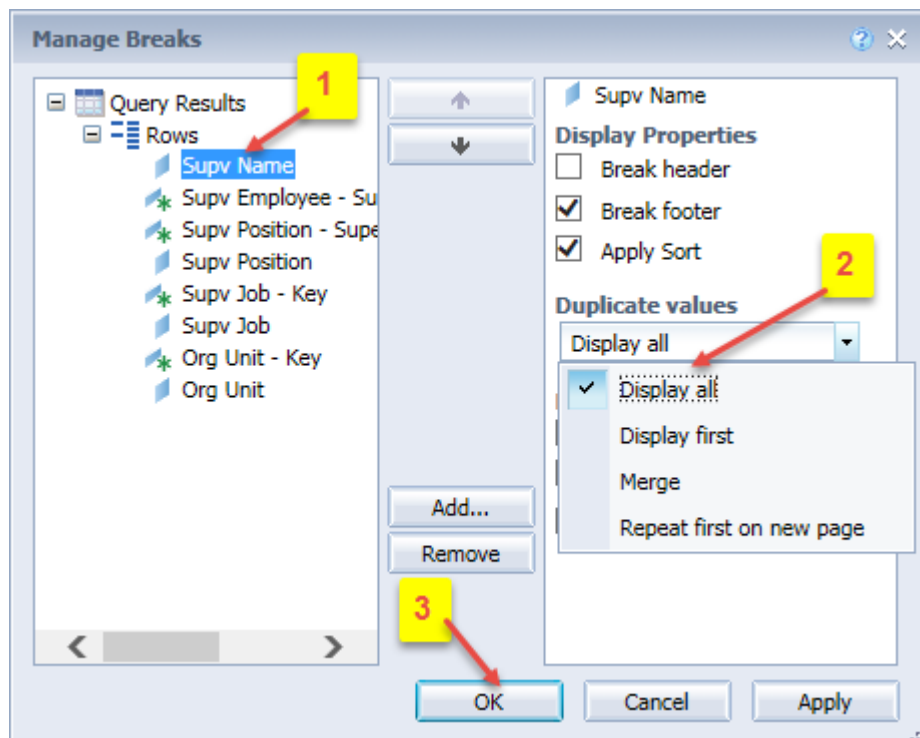
- ‘**Span of Control of a Position (Key)**’ dragged from ‘**Position**’ master data attributes shows the **subordinate position’s Span of Control**.
- Span of Control count includes Contractors at the time of display of Span of Control from the Supervisor position or Subordinate Position even if Contractors are excluded in the report prompt screen.
- Positions **60013824** (TS), **60088920** (TS Ghost Supv) and **65002381** (National Guard have been or still are used by Temporary Solutions when another supervisor is not identified. These **positions are not included in the Span of Control calculation** as they do not represent supervisors how they are intended by the B002 relationship on IT1001. Should these positions start being used as supervisors in the traditional sense, they will not be included in the Span of Control calculation unless a program change is made.
- ‘**Supervising (Key)**’ flag specifies whether a position is a supervising position (Y) or not (N).
- T The B0096 report was designed so row values are not duplicated on breaks when the report is first displayed. There are breaks on several objects on this report, so the repeating supervisor and organizational unit information will not be duplicated on each row. The following instructions will show how to repeat the values on each row of the report. Once the report is set up to repeat the values, you can then export the report to Excel, and the values will be repeated on the spreadsheet as well.
 - Run the B0096 report for the desired organization unit(s) and date, and any other values needed for the optional prompts.
 - Once in the report, click on Design



- Click on any row within the report, and then click on the Analysis tab (1);
- Click on the drop-down for Break (2).
- Select the Manage Breaks option (3).



- Click on "Supv Name" under Query Results (1).
- Change the **Duplicate values** option from "Repeat first on new page" to "Display All" (2).
- Repeat steps (1) and (2) for each of the objects listed under Query Results, so all values will repeat.
- Once this is complete for all objects, click "OK" (3).
- All values will be displayed in the report. When the report is exported to Excel, the duplicate values are displayed.



If the report will need to be exported to Excel on a regular basis, you may save the report to your "My favorites" folder with these changes in place. Once it is saved with these changes, the reformatted report will be available to you when you need it, and you won't have to go through these reformatting steps again.

CHANGE LOG

<p>Effective 12/3/2015</p> <ul style="list-style-type: none">• Initial report creation to convert from BI to BOBJ.
<p>Effective 9/15/2016</p> <ul style="list-style-type: none">• Additional updates to the report.
<p>Effective 4/30/2020</p> <ul style="list-style-type: none">• Formatting update.• Added Span of Control Count and Supervising flag to Supv Position and Position as attributes.
<p>Effective 9/2/2021</p> <ul style="list-style-type: none">• Added Field/Home Based indicator to Position attributes (expanded list) in Available Objects.