



# HRS 750: UDW+ Ad Hoc Reports Training

**Version 1.8**

Program Services Office & Decision Support Group

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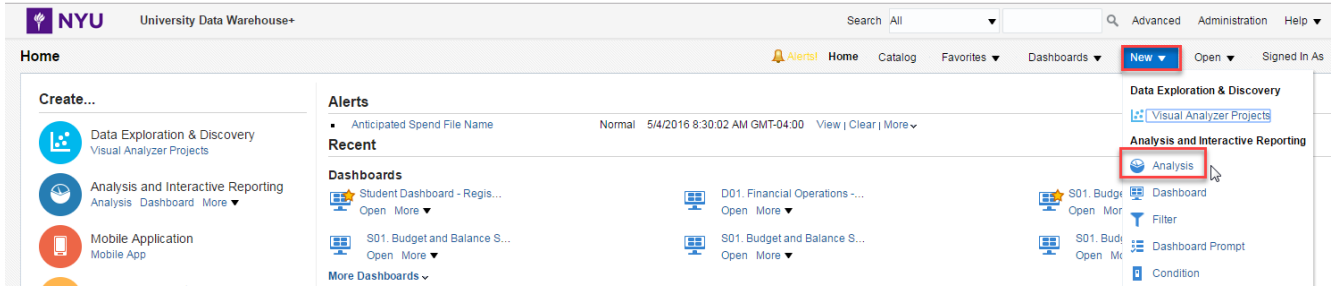
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## Subject Areas

1. Select **New** from the Header section. Choose **Analysis**.



This brings to you a list of available **Subject Areas**. Subject Areas group similar data elements together that answer specific business questions. These are granted to users based on security access and role. The following HR Subject Areas may be available to you:

- **HR - Position Assignment:** use this subject area to see the current status of a person and position, as well as all related information. This does not provide salary information.
- **HR - Compensation:** use this subject area to see captured events related to a compensation change for a person or position (including all full-time faculty and administrative employees that are salary or hourly employees).
- **HR - Activity Based Pay:** use this subject area for certain employees that receive activity-based pay as the base compensation for their job (ie. adjuncts and some student-related positions that are paid for specific activities).
- **HR - Position Assignment Monthly Snapshot:** use this subject area for trending (i.e. monthly, yearly, quarterly) analyses of people and positions over time, from the current date, back to 9/1/2008.

2. Select **HR - Position Assignment**.

## Criteria

**Activity Based Pay\_Adjuncts** Alerts! Home Catalog Favorites Dashboards New Open Signed In As

Criteria Results Prompts Advanced

**Subject Areas**

- HR - Activity Based Pay
  - Fact Activity Based Pay
  - Activity
  - Activity Task
  - Academic Period
  - As Of Dates
  - Academic Appointment
  - Costing Allocation
  - Day Activity Begin
  - Day Activity End
  - Day Pay Begin
  - Day Pay End
  - Year Activity Based Pay
- Job Profile
- Location
- Person
- Position
- Supervisory Organization

**Selected Columns**



Job Profile	Position	Activity	Activity Task	Day Activity Begin		
Job Family	Position Title	Position Id	Activity	Activity Category	Academic Period	Activity Begin

**Filters**


- Job Family is equal to / is in Adjunct Faculty
- AND Activity Category is not equal to / is not in 1 - Additional Compensation; 2 - Non-Hourly Student Pay; 3 - Post Doctoral Pay
- AND Activity Begin Date is greater than or equal to 09/01/2015
- AND Activity End Date is less than or equal to 08/31/2016

Title of currently opened request (by default this analysis is “Untitled”).

**Data elements** are stored in an expandable/collapsible tree. Click the plus signs to expand a branch, and the minus signs to collapse it.

- **Facts**  are Business Measures. Facts are things that are counted, aggregated, or that allow other mathematical calculations or analyses. Examples include Headcount, Position Open Count, Position Filled Count.
- **Dimensions**  are entities that describe how facts are analyzed. They are attributes of facts. Examples include accounts, faculty, student, programs, department, time period, and location. Using dimensions allows you to bring context to the facts.

**Selected Columns** are where your data elements go.

**Filters**  are used to filter specific elements.

**Save and Save As**   icons to save your analysis.

**Catalog** displays your saved filters.

**Data Elements:** Expand a folder by clicking the plus sign, then either double-click or drag and drop the data element into the “Selected Columns” area.

## **HR Position Assignment**

### **Fact Position Assignment**

**Position Filled Count:** may include same person in multiple positions

**Position Requisition Open Count:** when a requisition for a position is opened

**Headcount:** actual human bodies. Should match the filled count (except when a person holds 2 positions)

**Position Vacant Count**

**Position Closed Count**

### **As Of Dates**

**Position Assignment As Of Date:** used to see position related information at past or present date/time

**Costing Allocation As Of Date:** how a position is funded (if it is not filtered on, you will see all funding sources during the life of the position)

### **Costing Allocation**

**Business Unit, Fund, Org, Program, Project, Account**

**Costing Allocation Start Date**

**Costing Allocation End Date**

**Distribution Percent**

### **Day Position Filled**

**Position Filled Date**

### **Day Position Vacated**

**Position Vacated Date**

### **Job Profile**

**Hierarchy :** Job Family Group → Job Family → Job Profile → Position (or Business Title)

**Job Family Group:** used to differentiate between types of employees (including Academic, Administrative, Casual, Non-Exempt, Student, Union)

### **Person**

**Last Name, First Name**

**Employee Flag:** employment status

### **Position**

**Position ID**

**Position Title**

**Business Title**

**Worker Type:** regular, consultant, contractor or fixed term workers

### **Position Status**

**Position Status:** Filled, Unfilled (positions, not jobs), End Assignment, or Closed

**Current Indicator:** allows you to see the position in the current state; close equivalent to As Of Date = today; use Y or N

### **Supervisory Organization**

**Hierarchy (broad to narrow):** School Group → School → Reporting Department → Organization → Position ID

**Reporting Department:** cross-walk of various NYU systems (including PeopleSoft Campus Solution, Cayuse, FAME, PeopleSync/Workday and legacy HRIS) into Business Dept names

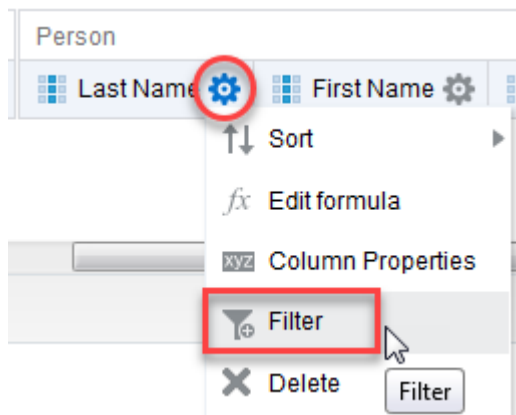
**Staffing Model:** used to differentiate between a position and job

**HR Position Assignment: List of all employees in your Organization as of today.**

1. Locate and add **data elements**:
  - **Organization** (under Supervisory Organization)
  - **Business Title** (under Position)
  - **Position ID** (under Position)
  - **Worker Type** (under Position)
  - **First Name** (under Person)
  - **Last Name**
  - **Employee Flag** = employment status
  - **Position Status** (under Position Status) = Filled, Unfilled (positions, not jobs) , End Assignment, or Closed
  - **Reporting Department** (under Supervisory Org -> Supervisory Org Reporting Dept) = cross-walk of FAME and Workday Depts. into Business Dept names.
  - **Position Assignment As Of Date** (under As Of Dates) = used to see position related information at past or present date/time.

**Filters**

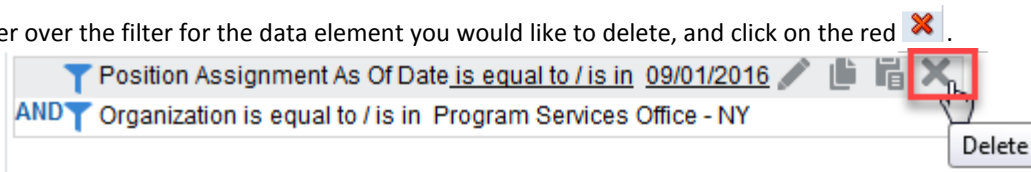
In almost all cases, you wouldn't want your query to return data from every record in the database. To limit that data, you add filters to your queries. To create a new filter on a given data element, hover over the three lines and click the Filter icon on the drop down menu for that element.



2. Create a filter where **Organization** = (enter your org)
3. Create a filter where **Position Assignment As Of Date** = today's date in format: MM/DD/YY (example: 8/12/14)
4. Click on the **Results** tab.

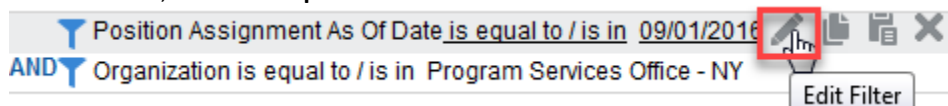
**Delete:**

Hover over the filter for the data element you would like to delete, and click on the red X.



**Edit:**

To edit a filter, click on the pencil icon next to that data element.






1. Click on **Results** tab.

## Results

**Compound Layout**= shows the Table view and Title view by default. Additional views may be added such as Pivot Tables, Graphs, Gauges, Maps, etc. and will be covered later in this class.

Icons for viewing:

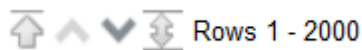
- **Format Container**  = change alignment, colors, border styles, etc.
- **Editor**  = provides options to edit
- **Remove**  = removes given view from compound layout

**Subject Area**= data elements columns can be added directly to a view on the Results tab by double clicking or dragging and dropping.

**Catalog**= displays your saved filters.


**Views**= A list of all created views, which may be added or removed from the Compound Layout. By default, Title and Table already exist.

**Rows**= Displays the first = Displays the first 2,000 rows.






## Rearrange Columns

By default, UDW+ will group columns together by their folder structure. You can **rearrange** the columns by dragging and dropping them. Make **Reporting Department** and **Organization** the first two columns:

- **Grab** the **Reporting Department** column by hovering above its name until you see the multidirectional arrow  over the tab on the top.
- **Drag** it until you see a **light-blue line** to the left, position it to be the first column, and then **drop** it.
- Repeat steps for **Organization**, so it is the second column.

## Save Analysis

1. **Save** the created analysis by clicking the **Save**  icon. The **Save As**  option is also available should you wish to save an analysis under a different name or location.
2. Go to **My Folders**, create a new folder by clicking the **New Folder**  icon.
3. Name this folder "**Training**".
4. In the new **Training** folder, save the analysis as "**HR\_Position Assignment\_Employees by Org**".
5. Click **OK**. Note that the name of the analysis and title have been changed.

## Catalog

In the Catalog section, you can open, edit, copy, rename, and perform a variety of other actions accessed through the “More” dropdown option.

Under Shared Folders/ School and Admin Folders, each School/Dept has its own folder, and sub-folders for Finance, HR, and Student.

Actor	Action
Anyone	Open and Run
Ad Hoc Users	Edit and Copy
Designated analysts	Save
DSG	Delete and Rename


6. To **access** your saved analyses, click on **Catalog** in the header row.
7. Expand **My Folders** by clicking on the + sign.
8. Find your training folder.
9. Find your analysis and click **Edit**.

## HR Position Assignment: View a total headcount and position count in your Reporting Department as of 1/1/2016.

1. Go to **New** and click **Analysis**.
2. Select the Subject Area: **Position Assignment**.
3. Add the following **dimensions**:
  - **Reporting Department** (under Supervisory Org -> Supervisory Org Reporting Dept)
  - **Staffing Model** (under Supervisory Org) = used to differentiate between a position and job.
  - **Organization** (under Supervisory Org)
  - **Job Family Group** (under Job Profile) = used to differentiate between types of employees (including Academic, Administrative, Casual, Non-Exempt, Student, Union)
  - **Worker Type** (under Position) = used to differentiate between regular, contractor, adjuncts, post-doc's or fixed term workers.
  - **Position Status** (under Position Status) = Filled, Unfilled (positions, not jobs) , End Assignment, or Closed
  - **Position Assignment As Of Date** (under As Of Date) = used to see position related information at past or present date/time.
4. Add the following **facts**:
  - **Position Requisition Open Count**
  - **Position Filled Count** - may include same person in multiple positions
  - **Position Vacant Count**
  - **Position Closed Count**
  - **Headcount** - actual human bodies. Should match the filled count (except when a person holds 2 positions).
5. Add the following **filters**:
  - **Reporting Department** = (select your Reporting Dept)
  - **Position Assignment As Of Date** = 1/1/2016
6. **Run Results**.
7. Save the analysis as “**HR\_Position Assignment\_ Headcount and Position Count by Reporting Dept**”.



### Print

1. If you would like to print all of your rows, be sure to click on the double sided arrow at the bottom of your analysis prior to printing. If not, it will only print the first 25 rows.
2. Click the **Print** icon  in the upper left hand corner.
3. Select either **Printable PDF** or **Printable HTML**. At this point you can print the output.
4. **Close** the PDF or HTML window.

### Export

1. Click the **Export** icon.
2. Options:
  - a. **PDF**. Exporting is limited to 200,000 records.
    - a. **Excel**- Formatting will be maintained. Exporting is limited to 200,000 records.
  - b. **Data** >
    - i. **CSV Format** (Comma Separated Values). ). Limit of 500,000 records with max limit of 2,000,000 across formats
    - ii. **Tab delimited Format**- Brings over the “raw data” – does not maintain formatting. Total row count exported.  
It is *best practice* to use Tab delimited Format when you want to analyze the data.

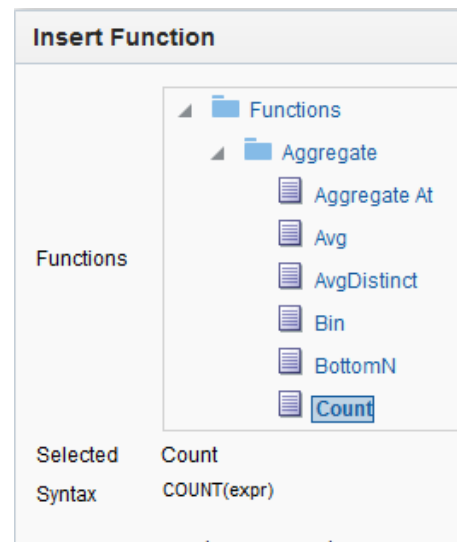
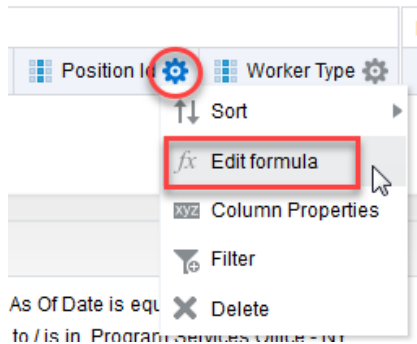
**HR Compensation: View a total position in Salary Threshold of \$47,476 (Admin and Researchers) as of 12/1/2016.**


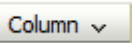
1. Go to **New** and click **Analysis**.
2. Select the Subject Area: **HR-Compensation**.
3. Add the following **dimensions**:
  - **Job Family Group** (under Job Profile) = used to differentiate between types of employees (including Academic, Administrative, Casual, Non-Exempt, Student, Union)
  - **Job Family** (under Job Profile)
  - **Organization** (under Supervisory Organization)
  - **Position ID** (under Position)
  - **Compensation Plan Type** (under Compensation Plans)
  - **Pay Group** (under Pay Group)
4. Add the following **facts**:
  - **Annualized Plan Amount**
  - **Previous Plan Amount** (under Previous Plan)
  - **Change Plan Amount** (under Previous Plan)
5. Add the following **filters**:
  - **Compensation Event as of Date** (Under As of Dates)= 12/01/2016
  - **Costing Allocation as of Date** (Under As of Dates)= 12/01/2016
  - **Annualized Plan Amount** is less than 47476
  - **Annualized Plan Amount** is greater than 0
  - **Compensation Plan Type** = Salary
  - **Pay Group** begins with USA
  - **Job Family** = Professional Researcher  
'OR'
  - **Job Family Group** = NYU – Administrative/Professional
6. **Run Results**.
7. Save the analysis as "**HR\_Compensation Position Threshold**".

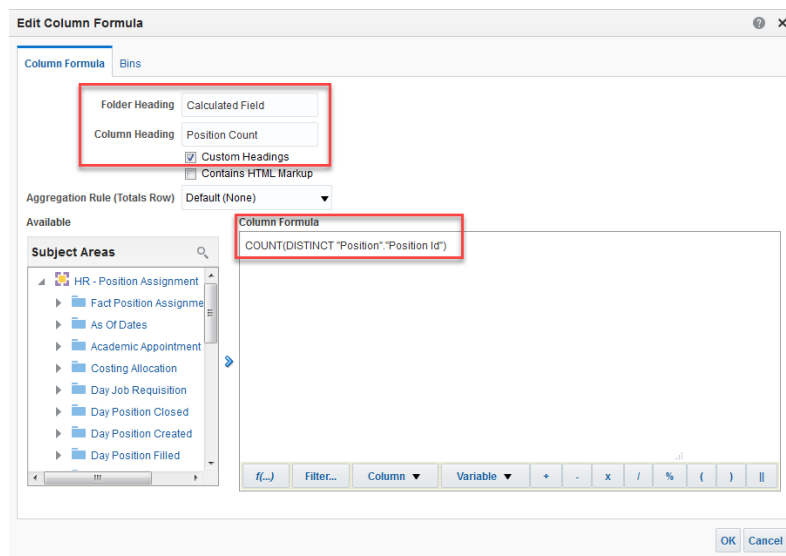
## Formulas

You can create a mathematical formula, which can range from simply adding two facts together to finding the percentage of two facts. You start by *adding a data element* of the same data type as the computed item (for example, if you want to create a new fact, choose a fact field). You are then going to *rename the folder heading and column heading* and *delete the formula* presently there. You have now created a **“blank slate”** to write a new formula.

8. Let's create a **formula** that counts the number of Positions.
  - Add another data element for **Position ID** (under Position)
  - Go to **Position** column and select the **Edit Formula**.




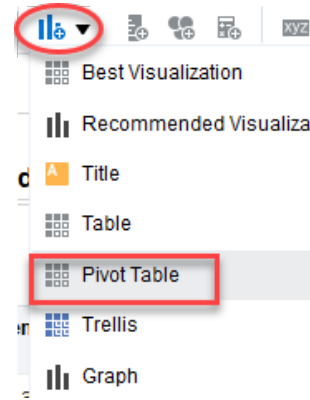
- In the “Edit Column Formula” box, check **Custom Headings**.
- Rename the **Folder Heading** to **“Calculated Field.”**
- Rename the **Column Heading** to **“Position Count”**.
- In the **Column Formula** box, delete the default formula.
- Click **Insert Function** 
- Under **Aggregate** folder, choose **Count Distinct**.
- Highlight **“expr”** and then go to Column  and choose **Position Id**.  
Formula: **COUNT(DISTINCT "Position"."Position Id")**




9. **Run Results.** Verify that your newly calculated column accurately displays the results.


### Pivot Table

1. Let's create a pivot table to view total **Position count** by **Job Family**. Click the **New View**  icon in the top toolbar.
2. Select **Pivot Table**. A Pivot Table view will be added to the bottom of the Compound Layout.

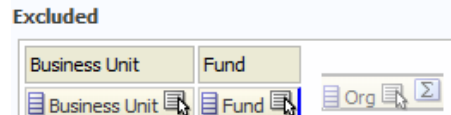
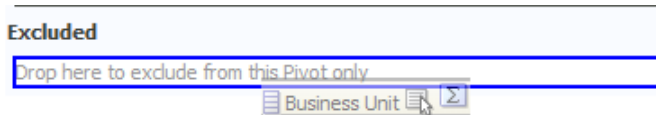


### Edit View/Layout

To **Edit** any view, scroll to the far right and click the **Pencil** icon . This will bring you to the **Edit Mode/ Layout Pane** for that view, where you can add totals, change headings, exclude fields, and much more.

It's a good idea to uncheck **Display Results**  in the upper toolbar while modifying your analysis. This prevents the results from being displayed in the Editing section, which can improve performance.


To make **changes**, **drag** fields into different sections of this pane and when you see the **blue line**, drop it in.

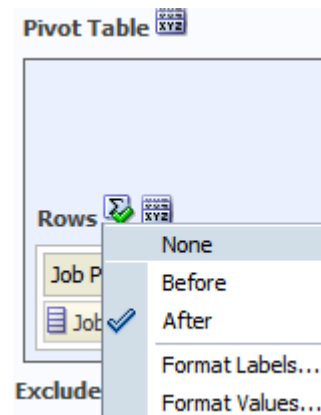


### Excluded

3. Under **Rows** drag all of the fields to the **Excluded** area except **Job Family**.

### Totals

4. Under **Rows**, click on the **Sum**  icon and select "After".
5. Click on 'Done' to take you back to the analysis results.
6. Save the analysis.



**Activity Based Pay: View Adjuncts Activity Pay Amount**

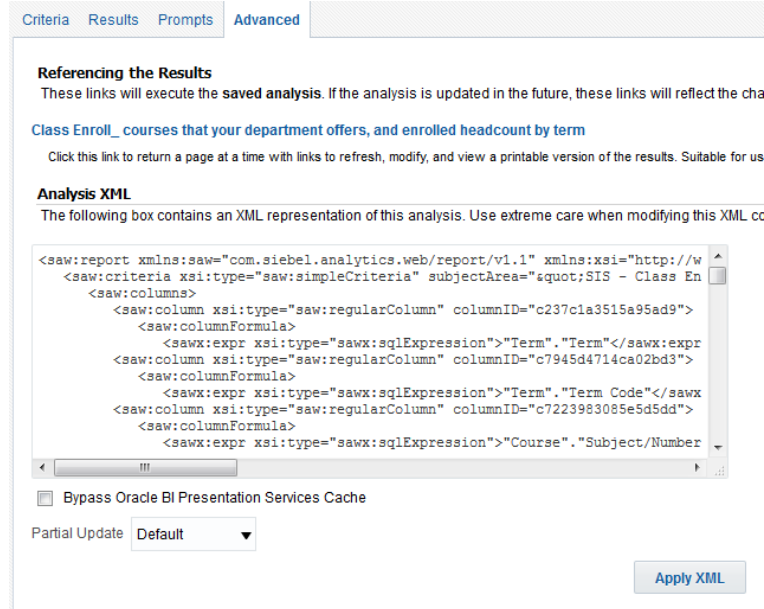
1. Go to **New** and click **Analysis**.
2. Select the Subject Area: **HR-Activity Based Pay**.
3. Add the following **dimensions**:
  - **Job Family** (under Job Profile)
  - **Position Title** (under Position)
  - **Position ID** (under Position)
  - **Activity** (under Activity)
  - **Academic Period** (under Activity Task)
  - **Activity Begin Date** (under Day Activity Begin)
  - **Activity End Date** (under Day Activity End)
  - **Activity Category** (under Activity)
4. Add the following **facts**:
  - **Distributed Total Amount**
5. Add the following **filters**:
  - **Job Family** = Adjunct Faculty
  - **Activity Category is not equal to** = 1- Additional Compensation; 2- Non-hourly student pay; 3- Post-Doctoral Pay; '-'
  - **Activity Begin Date** is greater than or equal to 09/01/2015
  - **Activity End Date** is less than or equal to 08/31/2016
6. **Run Results**.
7. Save the analysis as "**HR\_Activity Base Pay Adjuncts**".

## XML Code

Sharing XML codes is a great way to troubleshoot any issues you may be having with your analysis or sharing your analysis with another user. You may be asked to send your XML code to the DSG Analyst or another user for troubleshooting.

### Obtaining and Sending XML Codes:

1. In your analysis, go to the **Advanced** tab.
2. Under **Analysis XML**, highlight and copy the entire section (Ctrl+A to select all and Ctrl+C to copy).



The screenshot shows the Oracle BI interface with the 'Advanced' tab selected. Under the 'Analysis XML' section, there is a text area containing XML code. The code is as follows:

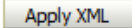
```
<saw:report xmlns:saw="com.siebel.analytics.web/report/v1.1" xmlns:xsi="http://w
<saw:criteria xsi:type="saw:simpleCriteria" subjectArea=""SIS - Class En
<saw:columns>
  <saw:column xsi:type="saw:regularColumn" columnID="c237c1a3515a95ad9">
    <saw:columnFormula>
      <saw:expr xsi:type="saw:sqlExpression">"Term"."Term"</saw:expr
<saw:column xsi:type="saw:regularColumn" columnID="c7945d4714ca02bd3">
    <saw:columnFormula>
      <saw:expr xsi:type="saw:sqlExpression">"Term"."Term Code"</saw
<saw:column xsi:type="saw:regularColumn" columnID="c7223983085e5d5dd">
    <saw:columnFormula>
      <saw:expr xsi:type="saw:sqlExpression">"Course"."Subject/Number
```

Below the text area, there is a checkbox for 'Bypass Oracle BI Presentation Services Cache' and a 'Partial Update' dropdown menu set to 'Default'. An 'Apply XML' button is located at the bottom right of the section.

3. **Paste** it into an email send to the appropriate person.

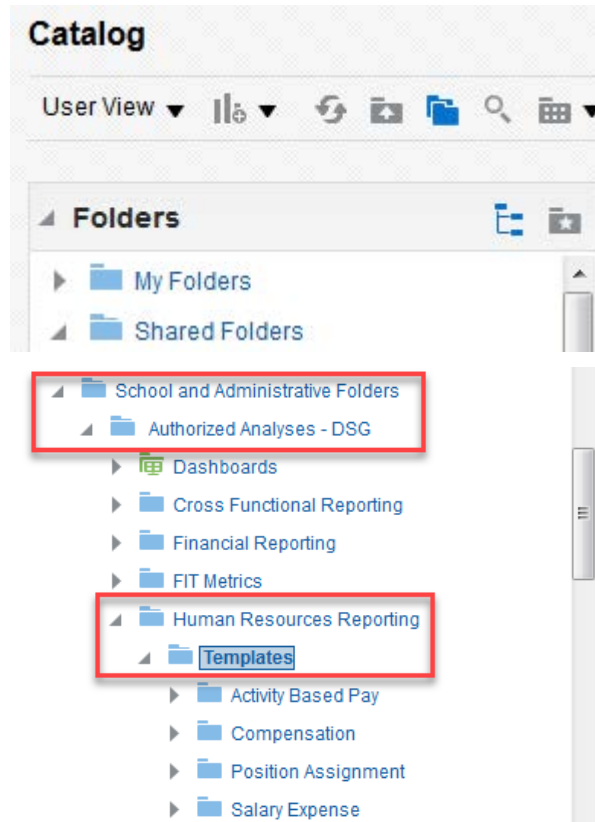
### Applying XML Codes:

If someone sends you XML code that you wish to apply:

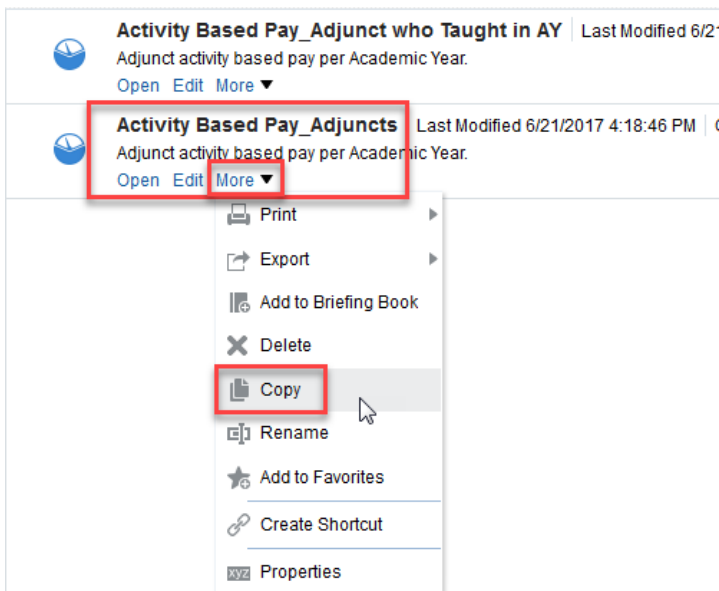
1. Create a **new analysis** using any subject area.
2. Go to the **Advanced** tab.
3. In the **Analysis XML** section, **delete** any code that is currently there.
4. **Copy** the entire contents of the XML code that was sent to you.
5. **Paste** the XML code into the **Analysis XML** section (using Ctrl+V to paste).
6. Click **Apply XML**. 
7. Go to the **Results** tab to run the analysis.

### UDW+ Templates

1. Go to **Catalog**→**Shared Folders**→ **School and Administrative Folders** → **Authorized Analyses- DSG** → **Human Resources Reporting**→ **Templates**



2. Find *Activity Based Pay\_Adjunct who taught per AY* analysis.
3. **More**→ **Copy**



4. Go to **My Folders** and either Right-Click and choose **Paste** or choose the **Paste** icon in the Catalog header.



5. Go to report in My Folders and choose Edit, and then edit filters.



## **Additional Exercises/Functionality**

*View the costing allocation details (dates and distribution %) for filled positions, within your organization as of one month ago.*

1. Go to **New** and click **Analysis**.
2. Select the Subject Area: **Position Assignment**.
3. Add the following *dimensions in the order below*:
  - a. Under, Position:
    - **Position ID**
    - **Position Title**
  - b. Under, Position Status:
    - **Position Status**
  - c. Under, Sup Org:
    - **Organization**
  - d. Under, Costing Allocation:
    - **Business Unit**
    - **Fund**
    - **Org**
    - **Program**
    - **Project**
    - **Account**
    - **Costing Allocation Start Date**
    - **Costing Allocation End Date**
    - **Distribution Percent**
  - e. Under, As Of Dates:
    - **Position Assignment As Of Date**
4. Add the following *filters*:
  - **Organization** = (select your own)
  - **Position Status** = Filled
  - **Position Assignment As Of Date** = one month ago

**Note:** Within the “As Of Dates” folder, there is **Costing Allocation As Of Date**. If there no filter on this date, you will see all funding sources during the life of the position. To see the funding sources as of a specific date:

5. Add the **Costing Allocation As Of Date** column (As Of Dates folder)
6. Create a *filter*: **Costing Allocation As Of Date** = one month ago.
7. **Run Results**.
8. **Save** as “**HR\_Position Assignment\_Costing Allocation for Filled Positions.**”


## Formulas

You can create a mathematical formula, which can range from simply adding two facts together to finding the percentage of two facts. You start by *adding a data element* of the same data type as the computed item (for example, if you want to create a new fact, choose a fact field). You are then going to *rename the folder heading and column heading* and *delete the formula* presently there. You have now created a “**blank slate**” to write a new formula.

*View the # of days an active employee has been in their position.*


1. Let's create a formula that determines the **days in current position**. Go to **New** and click **Analysis**.
2. Select the Subject Area: **Position Assignment**.
3. Add the following **dimensions in the order below**:
  - **Position ID** (under Position)
  - **Position Title** (under Position)
  - **Position Status** (under Position Status)
  - **Organization** (under Sup Org)
  - **Position Filled Date** (under Day Position Filled)
  - **Current Indicator** (under Position Status) = allows you to see the position in the current state (when = Y it is a close equivalent to As Of Date = today)
4. Add the following **filters**:
  - **Current Indicator** = Y
  - **Organization** = (select your own)
  - **Position Status** = Filled
5. **Add a dimension data element** (any data element that will be used to create the calculated item).
6. For the newly added data element, select the **Edit Formula** icon from the options drop down menu.
7. In the “Edit Column Formula” box, check **Custom Headings**.
8. Rename the **Folder Heading** to “**Calculated Field**.”
9. Rename the **Column Heading** to “**Days in Position**”.
10. In the **Column Formula** box, delete the default formula presently there.
11. We will create a custom **formula** that shows:

**Days in Position = Current Date- Position Filled Date**

12. Click **Insert Function** . Under **Calendar/Date** folder, choose **TimestampDiff**.

Formula:

**TIMESTAMPDIFF(interval, expr, timestamp2)**

13. Highlight **interval** and replace with “**SQL\_TSI\_DAY**” (must type in) in order to show the difference in days (*note: SQL command name is case sensitive*).
14. Highlight **expr** and replace with **Position Filled Date** column (by selecting it from the Column menu).
15. Highlight **timestamp2**. **Insert function** . Under **Calendar/Date** folder, choose **CURRENT\_DATE**.


Formula should look like:

**TIMESTAMPDIFF(SQL\_TSI\_DAY, "Day Position Filled"."Position Filled Date", CURRENT\_DATE)**

16. When finished, click **OK**.
17. Run **Results**. Verify that your newly calculated column accurately displays the results.
18. **Save** your analysis as “**HR\_Position Assignment\_Days in Position**”.

## Column Properties

**Column properties** opens up a dialog box where you can change numerous things about the appearance and functionality of the field.

1. Go to **Days in Position** column and select the **Column Properties**  icon.
  - *Style* properties change the data element's formatting, including fonts, colors, borders, and alignment.
  - *Column Format* properties change the data element's headings and value suppression settings.
  - *Data format* properties allows you the change how the data element values get displayed. With numeric fields, for example, you can set the number of decimal places to display, choose to display a thousand's separator, and define negative numbers.
  - *Conditional Format* lets you set formatting when specific conditions are met.
2. **Style:**
  - Choose font **Color**, **Style**, and **Background** color.
3. **Column Format:**
  - Check **Custom Headings**.
4. **Data Format.**
  - In "Treat Number As", select **Percentage**.

### **Conditional Formatting**

You can create conditions for how cells are formatted. When the value of the cell meets the condition, the format you select is applied to the cell. *For example, you can have a cell appear **bold** when the value is greater than 100. This allows you to identify important data at a quick glance.*

1. Let's create a **Conditional Format** to *display a red flag when there are no open positions*.
2. From **Days in Position** column, select the **Column Properties** icon.
3. Go to the **Conditional Format** tab.
  - a. Click **Add Condition**. Choose **Days in Position** column.
  - b. In the **New Condition** box, select "**is less than**" and type in "**90**". Click **OK**.
  - c. In the **Edit Format** window, add the image of a **red flag**. Click **OK**.
4. Run **Results**.

### **View Filled and Vacant Positions by School.**

1. Go to **New** and click **Analysis**.
2. Select the Subject Area: **Position Assignment**.
3. Add the following **facts** and **dimensions** in the order below:
  - a. Under, As Of Dates:
    - o **Position Assignment As Of Date**
  - b. Under, Sup Org > Sup Org Reporting Dept:
    - o **Reporting Department**
    - o **School Group**
    - o **Staffing Model**
  - c. Under, Job Profile:
    - o **Job Family Group**
  - d. Under, Fact Position Assignment:
    - o **Position Filled Count**
    - o **Position Vacant Count**
4. Add the following **filters**:
  - a. **School Group**= *(select your school)*
  - b. **Position Assignment As Of Date** = *today*
5. Run **Results**.



**Create a pie graph that shows the headcount for various job families within your organization.**

### **Graphs**

When creating an analysis for graphs, it is important to use the highest level of data, or most summarized. Since you'll be pulling data at the granular level, it is also important to use a filter for the time period. Let's create a simple analysis that can be used to create a pie graph.

1. Go to **New** and click **Analysis**.
2. Select the Subject Area: **Position Assignment**.
3. Add the following **dimensions in the order below**:
  - **Job Family Group**
  - **Job Family**
  - **Position Assignment As Of Date**
4. Add the following **fact**:
  - **Headcount**
5. Add the following **filters**:
  - **Organization** = (select your own)
  - **Position Assignment As Of Date** = today's date

### **Pie Graph**

1. Add a **New View** and select **Graph > Pie**. UDW+ will attempt to create a visualization based on your data set and type of Graph selected (this almost always needs to be edited).
  - **Measures** "Slice Size"= where you put your facts: **Headcount**
  - **Pies and Slices** "Pies"= creates a pie for each value
  - **Pies and Slices** "Slices"= what makes up the pie: **Job Family**
2. **Edit the Graph**: move **Job Family Group** to be a table prompt.
3. **Modify the Graph Title**:
  - a. On the properties toolbar at the top, click on the **Edit graph properties**  icon.
  - b. Go to the tab **Titles and Labels**.
  - c. Uncheck the option to "Use measure name as graph title". Rename the Title to "**Headcount by Job Family**".
  - d. To show percentages in your graph, click on **Data Markers**. 
  - e. In **Display Options** tab, change **Show Data Labels** to "**Always**".
  - f. Click **OK**.
4. Click **Done**. Note that graphs are drillable when you use hierarchy fields.
5. **Save** your analysis as "**Pie Graph**."
6. Using the same data, try creating a **Bar Graph**.

**View the days a current vacant position has been unfilled.**

Continuing with the training scenario #6,


1. Go to the **Criteria** tab.
2. Delete the **Position Filled Date** and **Days in Position** columns (*by selecting Delete from each column's menu options*)
3. Add **Position Vacated Date** (under Day Position Vacated).
4. Add **Position Requisition Open Count** fact.
5. Change **Position Status** filter to **Unfilled**.
6. Add any dimension data element to be a "blank slate" for your calculation.
7. Select the **Edit Formula** icon from the options drop down menu for that data element.
8. In the "Edit Column Formula" box, check **Custom Headings**.
9. Rename the **Folder Heading** to **Calculated Field**.
10. Rename the **Column Heading** to **"Days Position Unfilled"**.
11. In the **Column Formula** box, delete the default formula presently there.
12. Create the following custom **formula** that shows:

**Days Position Unfilled = Position Vacated Date - Current Date**

13. Insert function.
14. Under **Calendar/Date** folder, choose **TimestampDiff**, which is:

Formula:

**TIMESTAMPDIFF(interval, expr, timestamp2)**

15. Highlight **interval** and replace with **"SQL\_TSI\_DAY"** (must type in) in order to show the difference in days (*Reminder: SQL command name is case sensitive*).
16. Highlight **expr** and replace with **Position Vacated Date** column.
17. Highlight **timestamp2**. Insert function . Under **Calendar/Date** folder, choose **CURRENT\_DATE**.

Formula should look like:

**TIMESTAMPDIFF(SQL\_TSI\_DAY, "Day Position Vacated"."Position Vacated Date", CURRENT\_DATE)**

18. When finished, click **OK**.
19. Run **Results**. Verify that your newly calculated column accurately displays the results.
20. **Save** your analysis with the title **"Days Position Unfilled"**.

### Preview Results in Dashboard View

If you want to drill down on a hyperlink, such as **Job Family Group**, to view more details, you can use the “**Show how results will look on a Dashboard**” view. This will avoid adding additional columns and filters to your analysis.

1. In the Results tab, click the **Show how results will look on a Dashboard** icon to preview.
2. In the Dashboard Preview window, drill into the **Job Family Group**, to **Job Family**, to **Job Profile** as desired to see the results. A new column will be added for each.

**Hierarchy : Job Family Group -> Job Family -> Job Profile -> Position (or Business Title)**

3. When finished, click the **delete** icon in the upper right-hand corner to close the Dashboard Preview window. (Be careful not to close the UDW+ window.)

**Exercise: Create an analysis for your school that shows Total Headcounts by Full time or Part time employees as of today, by each Organization.**

*Hint:* Under Position, **Time Type** shows full time and part time status.

### **Copy and Paste Style Format**

If you want to copy and apply the style properties from one column to another:

2. Open the **Column Properties** window for the column from which you wish to copy the formatting.
3. On the **Style** tab, click the **Copy Cell Format** icon and click **OK**.
4. Open the **Column Properties** window for the column to which you want to apply the copied formatting and click the **Paste Cell Format** icon.
5. To restore the default setting and **Clear Cell Format** (eraser) icon.

**Note:** Changes made to a column in the Criteria tab will apply to all views within the analysis. Changes made to a column in the Results tab will apply only to that specific view.



**Congratulations! You have successfully completed the  
HRS 750: UDW+ Ad Hoc Reports Training course!**

**Contact**

The **Decision Support Group (DSG)** is here to help!

- Email: [askDSG@nyu.edu](mailto:askDSG@nyu.edu)
- Phone: 212-998-2900
- Web: [www.nyu.edu/datawarehouse/dsg](http://www.nyu.edu/datawarehouse/dsg)

