**Initial Insert for CSR\_Hierarchy Table**

This document describes the process being used to do the initial populate for the CSR Hierarchy table. Since we have not had to maintain the historical CSR hierachy in the past, we are using the data available in the BCC Scorecards data.

There are some gaps in the Hierarchy in the Scorercards table when a relationship could not be established.

This process eliminates those gaps to ensure there is continuity in the hierarchy.

SELECT [CsrEmployeeId]

,[CsrName]

,[START\_DATE]

,[END\_DATE]

,[SupervisorEmployeeId]

,[SupervisorName]

,[ManagerEmployeeId]

,[ManagerName]

FROM [BCC\_Scorecards\_Dev].[bcc\_scrd].[HIERARCHY\_V02] A

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| CsrEmployeeId | CsrName | START\_DATE | END\_DATE | SupervisorEmployeeId | ManagerEmployeeId |
| 223760 | Johnie Leadingham | 20130823 | 20130903 | Unknown | Unknown |
| 223760 | Johnie Leadingham | 20130904 | 20131007 | 223259 | 401404 |
| 223760 | Johnie Leadingham | 20131008 | 20131008 | 901627 | Unknown |
| 223760 | Johnie Leadingham | 20131009 | 20131010 | 223259 | 401404 |
| 223760 | Johnie Leadingham | 20131011 | 20131103 | 901627 | Unknown |
| 223760 | Johnie Leadingham | 20131104 | 20131108 | 223259 | 401404 |
| 223760 | Johnie Leadingham | 20131109 | 20131110 | Unknown | Unknown |
| 223760 | Johnie Leadingham | 20131111 | 99991231 | 223259 | 401404 |

/\*

Before and After cleanup scenario represented for one employee in the tables above and below.

Records/cases we might want to disregard

Unknown values of sup emp id or mgr emp id highlighted in yellow

Records we want to cleanup

After removing the Unknowns and for gaps in date range, create date

ranges without gaps by using the end\_date+1 of previous valid hierarchy

record as start\_date for next valid Hierarchy record.

\*/

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| EmpID | SupID | MgrID | StartDate | EndDate |
| 223760 | 223259 | 401404 | 9/4/2013 | 10/7/2013 |
| 223760 | 223259 | 401404 | 10/8/2013 | 10/10/2013 |
| 223760 | 223259 | 401404 | 10/11/2013 | 11/8/2013 |
| 223760 | 223259 | 401404 | 11/9/2013 | 12/31/9999 |

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Cleanup Steps

1. Filter the record set to remove all records that have an Unknown in sup id or mgr id.
2. Query the remaining records as 2 sets, one to assign rownum based on start date and the other to assign rownum+1 based on end-date
3. Query the first valid row (rownum=1) based on start date.
4. Union that row with the rest of the result set which is fetched by using the end\_date of previous record as start date.
5. \*/

THIS IS THE ACTUAL SQL TO POPULATE

# Run this in a window pointed to BCC\_Scorecards DB in the appropriate environment

# UPDATE eCoaching DB NAME APPROPRIATELY FOR EACH ENVIRONMENT

--Copy the entire query and run with nothing selected.

-- Record set with rownum based on start date

; WITH StartD AS

( SELECT

[CsrEmployeeId]

,[SupervisorEmployeeId]

,[ManagerEmployeeId]

,[Start\_Date]

,[End\_Date]

,ROW\_NUMBER() OVER( PARTITION BY [CsrEmployeeId]

ORDER BY [Start\_Date]) AS Rn

FROM

[bcc\_scrd].[HIERARCHY\_V02]

where SupervisorEmployeeId <> 'Unknown' and ManagerEmployeeId <> 'Unknown'

--AND CsrEmployeeId='223760'

),

-- Record set with (rownum +1) based on end date

EndD AS

( SELECT

[CsrEmployeeId]

,[SupervisorEmployeeId]

,[ManagerEmployeeId]

,[Start\_Date]

, End\_Date

,1+ROW\_NUMBER() OVER( PARTITION BY [CsrEmployeeId]

ORDER BY End\_Date )

AS Rn

FROM

[bcc\_scrd].[HIERARCHY\_V02]

where SupervisorEmployeeId <> 'Unknown' and ManagerEmployeeId <> 'Unknown'

--AND CsrEmployeeId='223760'

)

-- starting insert into CSR\_Hierarchy table

insert into[eCoachingDev].[EC].[CSR\_Hierarchy]

([EmpID]

,[SupID]

,[MgrID]

,[StartDate], [Enddate]

)

-- Query first row based on start date

SELECT distinct

s.[CsrEmployeeId]

,s.[SupervisorEmployeeId]

, s.[ManagerEmployeeId]

, [bcc\_scrd].[fn\_dtYYYYMMDD\_to\_Datetime](s.[Start\_Date])as StartDate

,case when s.End\_date <> 99991231 Then [bcc\_scrd].[fn\_dtYYYYMMDD\_to\_Datetime](s.[End\_Date])

Else '9999-12-31 00:00:00.000' END as EndDate

FROM

StartD AS s

where Rn=1

--AND CsrEmployeeId='223760'

-- Union that with

UNION ALL

-- The rest of the records using the end date of the previous record as start date for subsequent record.

SELECT distinct

s.[CsrEmployeeId]

,s.[SupervisorEmployeeId]

, s.[ManagerEmployeeId]

, DATEADD(day, 1, [bcc\_scrd].[fn\_dtYYYYMMDD\_to\_Datetime](e.[End\_Date]))as StartDate

,case when s.End\_date <> 99991231 Then [bcc\_scrd].[fn\_dtYYYYMMDD\_to\_Datetime](s.[End\_Date])

Else '9999-12-31 00:00:00.000' END as EndDate

FROM

StartD AS s

JOIN

EndD AS e

ON e.[CsrEmployeeId] = s.[CsrEmployeeId]

AND e.Rn = s.Rn

--AND s.CsrEmployeeId='223760';

--Which ends up giving us this cleaned up hierarchy set without gaps.

--For testing this insert truncate the existing data in the table using

--truncate table [eCoachingDev].[EC].[CSR\_Hierarchy]