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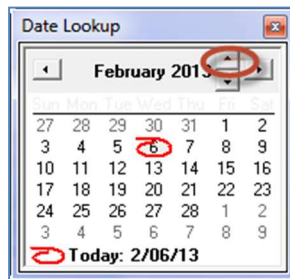
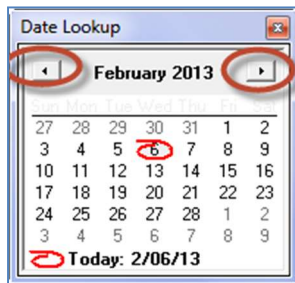
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## General Information

### Date Lookups

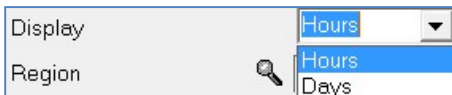
For any field that requires a date be entered, you can either type the date manually (remember to use the date format set in Windows e.g. mm/dd/yyyy), or you can use the date icon (📅) to select a date from the pop-up.

Navigation can be done by clicking on the Month and Year. Once the Month and Year are selected, click on the day of the month that's needed. The right or left arrow keys will increase or decrease the month. The up or down arrow keys will increase or decrease the year.



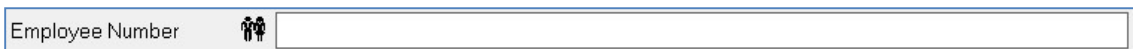
### Drop Down Lists

Click on the drop down arrow and select one of the values listed. Only one value may be selected at a time.



### Employee Lookups

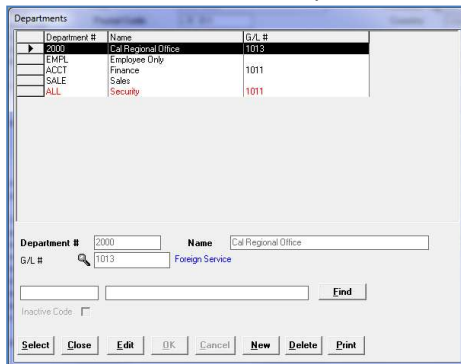
Any field that requires an employee number to be entered will be identified using the people icon (👤). A single-click on this icon will bring up a list of employees. Select the employee or employees you want included in the report.





## Table Lookups

Anywhere you see a **magnify glass** (🔍), there is a coding table where the codes are stored for that field. All Table Lookups have the same basic functions.



- To create a new code select **New**
- Enter in the **Code** and the **Description**
- Select **OK**

**Note:** A search can be made for any code by either typing in the code or description then selecting **Find**. When a code and description shows in red it has been made inactive; the code cannot be used, but the code has been used in the past and the history is maintained in the data base.

## Buttons

Button	Purpose
<b>Select</b>	Once a code is highlighted, either double-click the line or single-click the line and click on the Select button.
<b>Close</b>	Closes the coding table.
<b>Edit</b>	To edit a description of a code; the code itself cannot be changed.
<b>OK</b>	When an edit is made select OK to save the changes.
<b>Cancel</b>	Will stop any actions taken.
<b>New</b>	To enter a new code.
<b>Delete</b>	To delete a code.
<b>Print</b>	Will print a list of all codes displayed in the table.

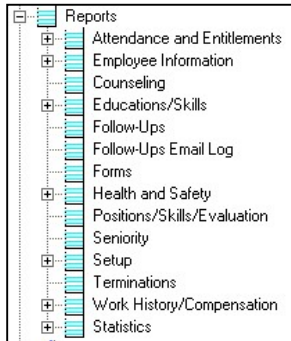
If the Selection Criteria field is longer, e.g. Division, more than one code can be selected by pressing the CTRL or SHIFT key. If the Selection Criteria field is shorter, e.g. Location, only one code can be selected.

Selection Criteria	
Division	🔍 <input type="text"/>
Team	🔍 <input type="text"/>
Location	🔍 <input type="text"/>

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## Menu Structure

The info:HR Reports menu is categorized by function. The menu item structure is similar to that of the Employee menu item structure. The major items include:




Menu Item	Purpose
<b>Attendance and Entitlements</b>	Section contains reports related to an employee's attendance or entitlements including future-dated vacation entitlements.
<b>Employee Information</b>	Section contains reports related to an employee but is not salary specific.
<b>Counseling</b>	Contains a report with the ability to ask for specifics related to counseling or disciplinary action related to an employee.
<b>Education/Skills</b>	Section contains reports related to courses an employee has taken or the level of education or skills they have.
<b>Follow Ups</b>	Contain a report with the ability to ask for specific follow-ups, future dated or past due, completed or incomplete.
<b>Health and Safety</b>	Section contains reports related to specific incidents, location of injuries, or days of the week.
<b>Position/Skills/Evaluation</b>	Contains a report related to position information, not linked to employees.
<b>Seniority</b>	Contains a report with the ability to ask for a seniority list based upon various different dates.
<b>Setup</b>	Contains reports related to custom reports, security master templates and table master specifics.
<b>Terminations</b>	Contains a report with the ability to get details on employee terminations.
<b>Work History/Compensation</b>	Contains reports related to position and salary data.
<b>Statistics</b>	Contains reports related to various stats captured in the system.

## Selection Criteria

The Selection Criteria provides the opportunity to filter the information you wish to show on the report. For example, you may wish to run a report for a specific employee, or for all the employees in a specific department, or for activities that have occurred or will occur in a specified time period. By specifying those values in the Selection Criteria, a report will be generated excluding all other conditions.

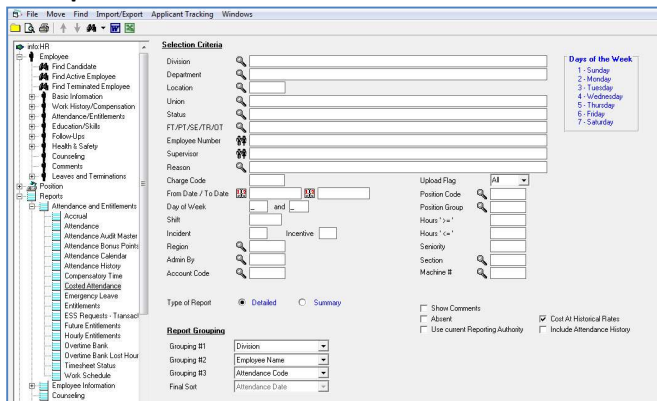
Multiple parameters can be entered in the Selection Criteria. For example, you may wish to run a report for all FT (full time) employees in a specific Union with activities occurring in the next 3 months. The three parameters would need to be entered in the Selection Criteria.

To look up a table value, double-click in the box where the data would be entered or single-click on the magnify glass () located to the left of the data entry box.

On lookups where a long line appears, double-click on the icon and hold down the “Ctrl” key to select multiple entries, e.g., Employee Number lookup. Once you have selected all the entries, click on the Select button to insert the highlighted items into the selection criteria. Another method of selecting multiple employees is to just type in their employee number. Use a comma to delimit between employees.

Finally, some reports can be generated in either Detail or Summary format.

## Example of Selection Criteria



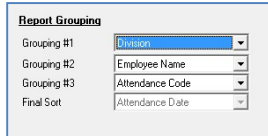
The screenshot shows the 'Selection Criteria' form in the 'info:HR Reports' application. The form is divided into several sections:

- Employee:** Fields for Division, Department, Location, Union, Status, FT/PT/SE/TRA/DT, Employee Number, Supervisor, Reason, and Charge Code.
- Position:** Fields for From Date / To Date, Day of Week, Shift, Incentive, Region, Admin By, and Account Code.
- Reports:** Fields for Attendance and Entitlements Account, Attendance, Attendance Audit Master, Attendance Bonus Point, Attendance Calendar, Attendance History, Compensatory Time, Local Attendance, Emergency Leave, Entitlements, ESS Requests - Transit, Future Entitlements, Hourly Entitlements, Overtime Bank, Overtime Bank Last Hour, TimeSheet Status, Walk Schedule, Employee Information, and Counseling.
- Days of the Week:** A list of days from Sunday to Saturday.
- Report Options:** Radio buttons for 'Detail' and 'Summary', and checkboxes for 'Show Comments', 'Absent', 'Use current Reporting Authority', 'Dual Historical Rates', and 'Include Attendance History'.
- Report Groupings:** Fields for Grouping #1 (Division), Grouping #2 (Employee Name), Grouping #3 (Attendance Code), and Final Sort (Attendance Date).

## Groupings

The Report Grouping options allow you to sort the information selected on the report.

### Report Grouping



Report Grouping

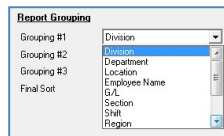
Grouping #1: Division

Grouping #2: Employee Name

Grouping #3: Attendance Code

Final Sort: Attendance Date

### Report Group Drop down



Report Grouping

Grouping #1: Division

Grouping #2: Location

Grouping #3: Department

Final Sort: Location

Employee Name

G/L

Section

Shift

Region

Grouping #1 is the major sort criteria. Grouping #1 controls totalling, page breaks, and headings. For example, if a report's Grouping #1 is Department, and you have asked for the report to be generated for every Department by leaving the Department option blank, the information will be totalled for each Department and the printer will begin a new page for each Department with a heading. If Grouping #1 is (none) or blank, then page breaks will occur only as they happen naturally. If Grouping #1 is (none), then many reports will begin with the first employee in alphabetical order and print the report for all employees selected.

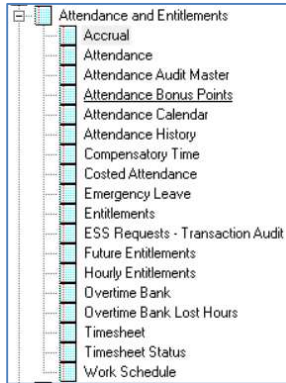
All other Groupings are secondary sorts. From the example screen in the Selection Criteria section above, if the Grouping #1 is Employee Name, Grouping #2 is Attendance Code, and Grouping #3 is (none), then the report would be printed by employee name in alphabetical order, and within each employee by attendance reason in alphabetical order, and within each attendance reason by descending Attendance Date. Page breaks (other than natural ones) would occur by employee so that you could give each employee their own report.

With some exceptions, the Final Sort is determined by info:HR.

## Attendance and Entitlements

The reports in this section produce information stored in the Attendance and Entitlements section of info:HR including, if purchased, the ESS and Timesheet Modules.

Below are the reports included in this section:



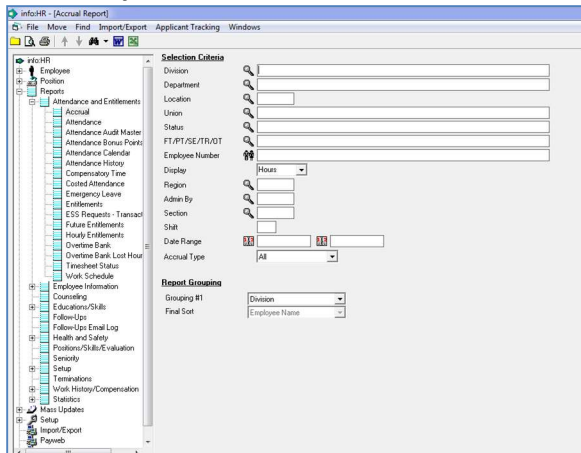
## Accrual

The purpose of this report is to help the user determine how an entitlement balance was calculated. Entitlements can be affected by the following types of transactions:

1. Manual changes completed by the user
2. Mass updates
3. Rollover
4. Zero Out

The report affects “Vacation”, “Sick Time” and “Hourly Entitlement” changes and shows the entitlement balance before and after the update. The reason, date and who did the update is also printed.

## Screen Layout



- The **Date Range** checks the *Transaction Date* and not the date that the user physically made the change. Sometimes, the dates are the same. A situation where the dates can be different is during the mass update of Vacation, Sick Time or Hourly Entitlement. In this case, the *Transaction Date* equals the *Effective Date* on the mass update screen.

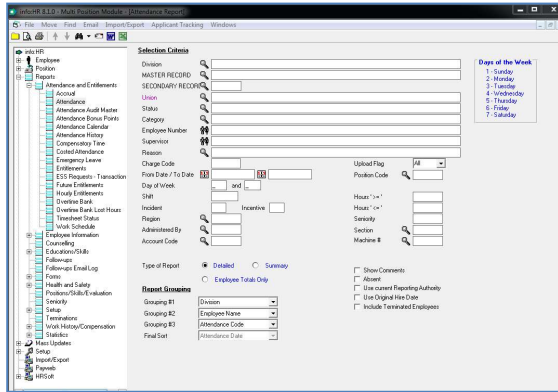
## Sample Report – Accrual Report in Hours

Time: 12:40:27 PM		Accrual Information in Hours				RZACCHRS				
Division	Employee Name	Accrual Type	Trans. Date	Hours	Comments	Update Type	Update Date/Time	By User ID		
Smith, Jane		Float Day	1/01/12	104.00	Mass added the Hourly Entitlement	A	11/27/13 08:21:01	999999999		
			12/31/13	104.00	Prev. Hourly Ent. Chg from 0 to 104	R	11/03/13 14:59:11	999999999		
			12/31/14	-104.00	Mass deleted existing Hourly Entitlement	D	1/13/14 08:39:03	999999999		
			4/01/13	80.00	Mass added the Hourly Entitlement	A	1/13/14 08:39:48	999999999		
			3/31/14	-80.00	Mass deleted existing Hourly Entitlement	D	1/13/14 08:41:00	999999999		
			4/01/13	80.00	Mass added the Hourly Entitlement	A	1/13/14 08:41:23	999999999		
			3/31/14	80.00	Prev. Hourly Ent. Chg from 0 to 80	R	1/22/14 12:58:07	999999999		
			3/31/12	0.00	Current Hourly Ent. Chg from 0 to 0	Z	1/22/14 12:59:18	999999999		
			Smith, Jane	Frozen Sick Bank	1/01/13	0.00	Mass added the Hourly Entitlement	A	10/23/13 09:52:42	999999999
					12/31/10	0.00	Mass deleted existing Hourly Entitlement	D	12/02/13 08:30:10	999999999
Smith, Jane		Jerry	12/03/13	-80.00	Deleted the Hourly Entitlement	X	11/03/13 14:41:09	999999999		
Smith, Jane		PTO Earned	1/01/14	0.00	Mass added the Hourly Entitlement	A	1/24/14 13:35:58	999999999		
Smith, Jane	Sick Entitlement	1/01/14	12.00	Current Sick Ent. Chg from 80 to 92 OS: 16	U	1/29/14 14:27:30	999999999			
		12/31/14	92.00	Prev. Sick Ent. Chg from 0 to 92	R	5/22/14 14:51:59	999999999			
		12/31/14	-92.00	Current Sick Ent. Chg from 92 to 0	Z	5/22/14 14:52:11	999999999			
		1/01/14	12.00	Current Sick Ent. Chg from 0 to 12 OS: 92	U	5/22/14 14:52:38	999999999			
Smith, Jane		Sickness in Family	12/31/13	-16.00	Mass deleted existing Hourly Entitlement	D	10/23/13 09:51:15	999999999		
Smith, Jane	Vacation Entitlement	1/16/13	12.00	Current Vac. Ent. Chg from 0 to 12 OS: 0	U	4/17/13 14:27:41	999999999			
		1/16/13	120.00	Current Vac. Ent. Chg from 12 to 132 OS: 12	U	4/17/13 14:27:57	999999999			
		6/01/13	20.00	Current Vac. Ent. Chg from 132 to 152 OS: 132	U	6/07/13 08:04:32	999999999			
		6/01/13	20.00	Current Vac. Ent. Chg from 152 to 172 OS: 152	U	11/27/13 14:23:45	999999999			
		12/31/13	-172.00	Current Vac. Ent. Chg from 172 to 0	Z	12/17/13 09:33:34	999999999			
		1/01/13	20.00	Current Vac. Ent. Chg from 0 to 20 OS: 144	U	12/17/13 09:34:04	999999999			
			2/01/13	20.00	Current Vac. Ent. Chg from 20 to 40 OS: 134	U	12/17/13 09:34:07	999999999		

## Attendance

This report is used to track current attendance or absenteeism in a number of ways. Attendance records that have been archived do not show on this report. If you need to see both archived and current attendance records, use the Attendance History Report.

### Screen Layout



With this report, users can answer some of the following questions:

- Monday/Friday absenteeism occurrences.
  - In the selection criteria enter 2 and 6 as the **Day of Week** options.
- For users who track both absenteeism and attendance, use the **Absent** box to print an Attendance Report for Reason Codes that you have identified as Absent Codes. If you use this option and you want ALL absent codes, you do not need to enter any Reason Codes in the selection criteria. Prior to using this, you must identify which Attendance Codes are absent. This can be done via the Attendance Code Lookup. Put a check against each code considered 'absent'.
- Use the **Show Comments** box if you want the report to print Attendance comments.
- The **Hours** selection criteria provides the users the ability to show only employees whose hours are equal to or exceeding the value entered in the selection criteria.
  - For example, you can enter a Reason Code of **SICK** and hours of **24**. The report will only print employees with 24 or more hours of **SICK**.
- The **Type of Report** allows the user to print either a detailed or summary report. The summary report prints only totals per Reason Code.
  - Detailed reports show every attendance record.
  - Summarized reports show one line per reason code.
- The **Employee Totals Only** when checked sums all the attendance records and displays one line per employee. No reason breakdown is shown.

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## Sample Report – Detailed Attendance Report

Time: 10:54:43 AM		Attendance Report							RZATTEND	
		No date entered								
Employee Nbr/Name	Reason	Date	Day of Week	Hours	Days	Charge Code	Inc.	Incentive	Sen.	
221028	Abbott, John	Vacation	18/01/2012	Wednesday	7.00	0.88		N	No	Y
	<b>Totals for</b>	<b>Vacation</b>			<b>7.00</b>	<b>0.88</b>				
	<b>Totals for</b>	<b>Abbott, John</b>			<b>7.00</b>	<b>0.88</b>				
1051	Adams, Karen	Sick time taken	10/10/2012	Wednesday	8.00	1.00		N	No	N
	<b>Totals for</b>	<b>Sick time taken</b>			<b>8.00</b>	<b>1.00</b>				
1051	Adams, Karen	Vacation	02/11/2012	Friday	8.00	1.00		N	No	Y
			01/11/2012	Thursday	8.00	1.00		N	No	Y
			31/10/2012	Wednesday	8.00	1.00		N	No	Y
			30/10/2012	Tuesday	8.00	1.00		N	No	Y
			29/10/2012	Monday	8.00	1.00		N	No	Y
			25/05/2012	Friday	8.00	1.00		N	No	Y
			22/05/2012	Tuesday	8.00	1.00		N	No	Y
	<b>Totals for</b>	<b>Vacation</b>			<b>56.00</b>	<b>7.00</b>				
	<b>Totals for</b>	<b>Adams, Karen</b>			<b>64.00</b>	<b>8.00</b>				
1014	Anderson, Dane	Vacation	28/05/2012	Monday	10.00	1.00		N	No	Y
			25/05/2012	Friday	10.00	1.00		N	No	Y
	<b>Totals for</b>	<b>Vacation</b>			<b>20.00</b>	<b>2.00</b>				
	<b>Totals for</b>	<b>Anderson, Dane</b>			<b>20.00</b>	<b>2.00</b>				

## Sample Report – Summary Attendance Report

Time: 12:42:52 PM		Attendance Summary Report			RZATTEN S	
		No date entered				
Employee Nbr. / Name	Reason	Hours	Days	Incident		
1231	Sampson, Harry	Sick Payout	64.00	8.00		
1231	Sampson, Harry	Statutory Holiday	64.00	8.00		
1231	Sampson, Harry	Vacation Earned	200.00	25.00		
1231	Sampson, Harry	Vacation Payout	436.00	54.50		
	<b>Totals for</b>	<b>Sampson, Harry</b>	<b>916.00</b>	<b>114.50</b>		
1021	Selby, Murray	Jerry	10.00	1.25		
1021	Selby, Murray	PT Stat Earned	10.00	1.25		
1021	Selby, Murray	Statutory Holiday	64.00	8.00		
	<b>Totals for</b>	<b>Selby, Murray</b>	<b>84.00</b>	<b>10.50</b>		
5505	Smith, Jane	Couse	14.00	1.75		
5505	Smith, Jane	Leave of Absence	880.00	110.00		
5505	Smith, Jane	PTO Earned	0.00	0.00		
5505	Smith, Jane	Sick Payout	64.00	8.00		
5505	Smith, Jane	Statutory Holiday	64.00	8.00		
5505	Smith, Jane	Vacation	10.00	1.25		
5505	Smith, Jane	Vacation Earned	200.00	25.00		
5505	Smith, Jane	Vacation Payout	144.00	18.00		
	<b>Totals for</b>	<b>Smith, Jane</b>	<b>1,376.00</b>	<b>172.00</b>		
8524	Wessler, Johnaton	Emergency Leave	8.00	1.07		
8524	Wessler, Johnaton	Jerry	8.00	1.07		
8524	Wessler, Johnaton	Lieu Taken	2.00	0.27		
8524	Wessler, Johnaton	Regular	24.00	3.20		
8524	Wessler, Johnaton	Sick	37.00	4.93	2	
8524	Wessler, Johnaton	Statutory Holiday	32.00	4.27		
8524	Wessler, Johnaton	Vacation Earned	40.00	5.33		
8524	Wessler, Johnaton	Vacation Payout	48.00	6.40		
	<b>Totals for</b>	<b>Wessler, Johnaton</b>	<b>199.00</b>	<b>26.53</b>	<b>2</b>	
<b>Grand Totals:</b>			<b>13,359.25</b>	<b>1686.21</b>	<b>2</b>	

## Sample Report – Totals Only Report

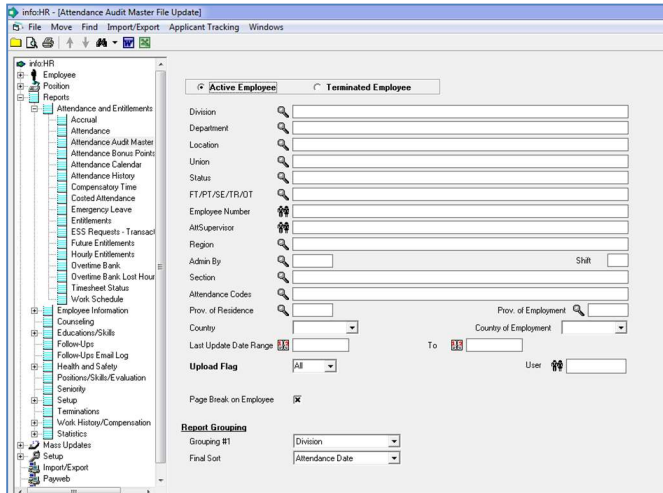
Time: 8:13:00 AM		Attendance - Employee Totals Report			RZATTENSTO	
		No date entered				
Employee Nbr. / Name	Hours	Days	Incident			
221026	Abbott, John	165.00	20.63			
221028	Abel, Alex	663.00	82.88			
1014	Anderson, Dane	135.00	16.88			
1050	Armstrong, Bob	171.00	21.38			



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## Attendance Audit Master

This report is used to determine the origin of attendance records, e.g. what changes were made to attendance records, when they were changed and who made the changes.



With this report users can determine which module generated an attendance record. It will display who generated or changed a record and what date and time the record was created or changed.

### Sample Report – Attendance Audit Report

Time: 12:47:22 PM		Attendance Audit Report						RZATTAUDIT2	
Employee Nbr/Name	Reason	Weekday	From Date	Hours	Date	Time	Changed By	Changed In	
11026	Abbott, John	Comp Earned	Friday	4/01/11	20.00	7/08/14	08:29:10 999999999	INFOHR	
1050	Armstrong-Smith, Grant		Friday	4/01/11	20.00	2/05/14	14:45:31 999999999	INFOHR	
11026	Abbott, John		Friday	5/11/12	6.00	2/05/14	14:45:31 999999999	INFOHR	
11026	Abbott, John		Monday	1/14/13	2.00	1/15/13	11:18 AM999999999	ESSAP	
1051	Adams, Karen		Saturday	1/11/14	8.00	1/10/14	11:39 AM999999999	ESSAP	
<b>Totals for Comp Earned</b>				<b>56.00</b>					
8524	Wessler, Johnaton	Emergency Leave	Thursday	3/21/13	8.00	2/13/13	14:48:30 999999999	IHRATT	
11026	Abbott, John		Monday	10/21/13	2.00	10/21/13	13:20:41 999999999	IHRATT	
<b>Totals for Emergency Leave</b>				<b>10.00</b>					
11026	Abbott, John	Float Day	Tuesday	3/1/92	5.00	7/08/14	08:29:10 999999999	INFOHR	
			Wednesday	4/01/92	8.00	7/08/14	08:29:10 999999999	INFOHR	
1050	Armstrong-Smith, Grant		Wednesday	4/01/92	8.00	2/05/14	14:45:31 999999999	INFOHR	
			Friday	5/01/92	8.00	2/05/14	14:45:31 999999999	INFOHR	
11026	Abbott, John		Wednesday	3/31/93	5.00	7/08/14	08:29:10 999999999	INFOHR	
			Thursday	4/01/93	8.00	7/08/14	08:29:10 999999999	INFOHR	
1050	Armstrong-Smith, Grant		Thursday	4/01/93	8.00	2/05/14	14:45:31 999999999	INFOHR	
			Saturday	5/01/93	8.00	2/05/14	14:45:31 999999999	INFOHR	
			Friday	8/02/96	7.00	2/05/14	14:45:31 999999999	INFOHR	
			Saturday	8/03/96	7.00	2/05/14	14:45:31 999999999	INFOHR	
			Monday	4/09/12	25.00	2/05/14	14:45:31 999999999	INFOHR	
			Monday	5/21/12	8.00	2/05/14	14:45:31 999999999	INFOHR	
5545	Darksey, Pat		Tuesday	12/18/13	8.00	2/03/14	12:53 PM999999999	TSAP	
			Wednesday	12/18/13	8.00	2/03/14	12:53 PM999999999	TSAP	
			Thursday	12/19/13	8.00	2/03/14	12:53 PM999999999	TSAP	
			Friday	12/20/13	8.00	2/03/14	12:53 PM999999999	TSAP	
3011	Abel, Samantha		Thursday	6/19/14	8.00	6/25/14	2:01 PM 999999999	ESSAP	
<b>Totals for Float Day</b>				<b>145.00</b>					
<b>Legends:</b> ESSA - ESS Attendance      IHRADJ - Pay Period Master      IHRATU - Attendance Mass Update      INFOHR - info:HR      TSE - Timesheet Data Entry ESSH - ESS Attendance History      IHRATH - Attendance History      IHRBAT - Batch Attendance      SICADJ - Sick Entitlement Master ESSAP - ESS Approval      IHRATT - Attendance      IHRFOR - Forfeit Hours      TSAP - Timesheet Approval									

## Attendance Bonus Points

Some Attendance Management programs evaluate different types of absenteeism by assigning Point values to those different types. An accumulation of point values over a period of time may result in recognition awards for attendance and/or may be part of the disciplinary process for absenteeism.

### Point Setup

1. Assign Point values to Attendance Reason codes. Point values can be positive (+) or negative (-).
2. Create an Attendance record for each employee that will record the employee's "as at" total point value.
3. If the "as at" total point value is prior to the date for which there are Attendance records in the system, then run the Point Tool.
4. Enter Attendance records as usual.
5. Run the Attendance Bonus Points report(s) as required.

### Screen Layout

The screenshot shows the 'info:HR - [Attendance Bonus Points Report]' window. The interface includes a menu bar (File, Move, Find, Import/Export, Applicant Tracking, Windows) and a toolbar. A left-hand navigation pane lists various HR modules, with 'Attendance and Entitlements' expanded. The main area is divided into several sections:

- Selection Criteria:** A list of search fields including Division, Department, Location, Union, Status, FT/PT/SE/TR/OT, Employee Number, Supervision, Change Code, Reason, From Date / To Date, Day of Week, Shift, Incentive, Hours >=, Region, Adm Sp, and Section.
- Days of the Week:** A legend for days 1 through 7: 1-Sunday, 2-Monday, 3-Tuesday, 4-Wednesday, 5-Thursday, 6-Friday, 7-Saturday.
- Type of Report:** Radio buttons for 'Detailed' (selected), 'Summary', and 'Total Points'. Checkboxes for 'Include Attendance History' and 'Bring Forward All Points'.
- Report Groupings:** Three dropdown menus for 'Grouping #1' (Division), 'Grouping #2' (Employee Name), and 'Final Sort' (Attendance Date).

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## Sample Report – Attendance Bonus Points Detailed

Time: 12:51:18 P		Attendance Bonus Points Detail Report					RZ POINT
No date entered							
Employee Nbr / Name	Reason	Date	Day of Week	Hours	Points	Running Total	
11026	Abbott, John	3/25/92	Wednesday	8.00	0.0	0.00	
11026	Abbott, John	3/31/92	Tuesday	5.00	0.0	0.00	
					<b>March 1992</b>	<b>0.00</b>	
11026	Abbott, John	4/01/92	Wednesday	8.00	0.0	0.00	
11026	Abbott, John	4/05/92	Sunday	8.00	0.0	0.00	
11026	Abbott, John	4/15/92	Wednesday	16.00	0.0	0.00	
11026	Abbott, John	4/16/92	Thursday	7.00	0.0	0.00	
11026	Abbott, John	4/16/92	Thursday	16.00	0.0	0.00	
11026	Abbott, John	4/16/92	Thursday	7.00	0.0	0.00	
11026	Abbott, John	4/17/92	Friday	8.00	0.0	0.00	
11026	Abbott, John	4/22/92	Wednesday	1.00	0.0	0.00	
					<b>April 1992</b>	<b>0.00</b>	
11026	Abbott, John	5/01/92	Friday	8.00	0.0	0.00	
11026	Abbott, John	5/01/92	Friday	1.00	0.0	0.00	
11026	Abbott, John	5/05/92	Tuesday	8.00	0.0	0.00	
11026	Abbott, John	5/06/92	Wednesday	8.00	0.0	0.00	
11026	Abbott, John	5/08/92	Friday	8.00	0.0	0.00	
11026	Abbott, John	5/10/92	Sunday	8.00	0.0	0.00	
11026	Abbott, John	5/21/92	Thursday	8.00	0.0	0.00	
11026	Abbott, John	5/22/92	Friday	8.00	0.0	0.00	
					<b>May 1992</b>	<b>0.00</b>	
11026	Abbott, John	6/02/92	Tuesday	8.00	0.0	0.00	
11026	Abbott, John	6/15/92	Monday	8.00	0.0	0.00	
11026	Abbott, John	6/16/92	Tuesday	8.00	0.0	0.00	
					<b>June 1992</b>	<b>0.00</b>	

## Sample Report – Attendance Bonus Points Summary

Time: 12:52:40 P		Attendance Bonus Points Report			RZ POINTS
No date entered					
Employee Nbr / Name	Points	Bring Forward Points	Total Points		
5505 Smith, Jane	0.00	0.00	0.00		
<b>Detailed:</b>	<b>Month</b>	<b>Points</b>			
	December 1996	0.00			
	January 2013	0.00			
	May 2013	0.00			
	July 2013	0.00			
	October 2013	0.00			
	November 2013	0.00			
	December 2013	0.00			
	January 2014	0.00			
	February 2014	0.00			
	March 2014	0.00			
	April 2014	0.00			
	May 2014	0.00			

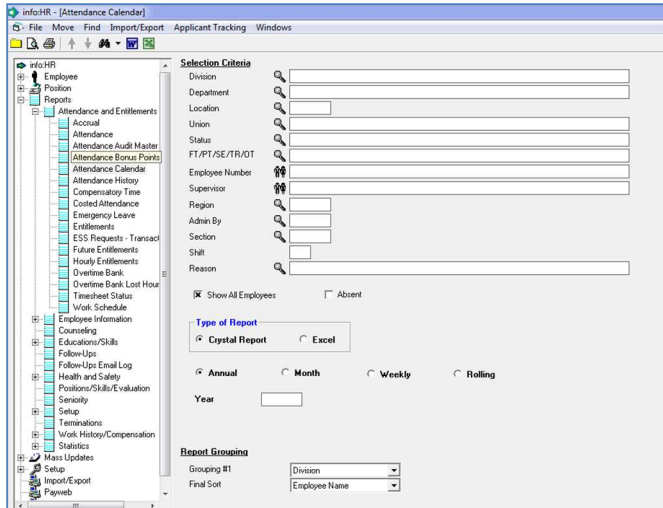
## Sample Report – Attendance Bonus Points Total Points

Time: 1:00:42 P		Attendance Bonus Points Report			RZ POINT
No date entered					
Division	West Coast Branch				
Employee Nbr / Name	Points	Bring Forward Points	Total Points		
11026 Abbott, John	8.00	0.00	8.00		
8524 Wessliier, Johnaton	0.00	0.00	0.00		
<b>West Coast Branch</b>	<b>8.00</b>	<b>0.00</b>	<b>8.00</b>		

## Attendance Calendar

The purpose of this report is to give a visual display of the employees' Attendance records.

### Screen Layout



- This report can be run for all attendance codes by leaving the **Reason** field blank. To view absent codes only, check the **Absent** box.
- This report can be displayed in **Crystal Report** or **Excel** format by selecting from **Type of Report**.
- Select how you would like the report to display (**Annual**, **Month**, **Weekly** or **Rolling**) and enter the applicable date information in which the attendance records fall under.

### Sample Report – Attendance Calendar Annual

Time: 11:27:39 AM MONTHLY EMPLOYEE ATTENDANCE CALENDAR RZA@CAM  
As of Apr 01, 2013 through Apr 30, 2013

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
Albers, John																																			
Adams, Karen																																			
Adams, Karen																																			
Adams, Karen																																			
Anderson, Dawn																																			
Armstrong, Bob																																			
Brown, Thomas																																			
Dean, Teri																																			
Hahn, Terry																																			
Hahn, William																																			
Harper, Betsy																																			
King, Deborah																																			

**BT** Recruitment time off      **CONF** Conference      **COCK** Cover      **CT** Comp time taken      **EXCC** Jury duty      **FD** Floating days off  
**FSC** Family sick time      **MA** Medical appointment      **MD** Morning day      **MENT** Mental health day      **GT** Comp time earned      **OFB** Low hours earned  
**OTPD** Overtime paid over      **PD** Professional development      **PTAC** Personal vacation      **REG** Regular      **SCC** Sick leave earned      **SCC** Sick leave taken  
**STAT** Statutory holiday      **SW** Sick - verified      **CHB** Digital sick time taken      **VAC** Vacation      **VSB** Client visit      **WCB** WCB hours absent  
**LATE** Late      **BFRB** Bring Forward unused hours      **OTBF** Bring Forward comp hours      **NLS** Bonus      **STB** Short Term Disability      **FLA** Paid leave earned

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## Sample Report – Attendance Calendar Monthly

Time: 1:03:28 PM MONTHLY EMPLOYEE ATTENDANCE CALENDAR RZAttCAM  
As of Mar 01, 2014 through Mar 31, 2014

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Abbott, John	SAT	SUN																													
Abel, Samantha	SAT	SUN																													
Adams, Karen	SAT	SUN																													
Adams, Jennifer	SAT	SUN																													
Armstrong-Smith, Grant	SAT	SUN																													
Brown, Thomas	SAT	SUN																													
Browning, Janice	SAT	SUN																													
Darkey, Pat	SAT	SUN																													
Dunn, Colin	SAT	SUN																													
Gilley, Catherine	SAT	SUN																													
King, William	SAT	SUN																													
King, Debra	SAT	SUN																													

**BT** Bereavement      **COVR** Court      **CT** Line Taken      **OT** Line Excess      **REG** Regular      **SICK** Sick  
**ST** Summer Holiday      **DSM** Unpaid Sick      **VAC** Vacation      **WCB** WCB/Leave Time      **ST** PT Not Taken      **STP** PT Not Excess  
**REG2** Regular Contingency      **LOA** Leave of Absence      **FTD** Paid Day      **OT15** Line Excess @ 1.5      **W** Comp Served      **STP** PT Not Excess  
**OT15** 15% PTO WARD COMP      **SOUL** VAC      **TOL** (Other than Vacation)      **IR** Int      **OV** Paid Overtime      **D** Days      **CTF** CT Ferried Hours  
**REGW** Regular Week Worked      **ERA** ERA      **FLEX** Flex      **SICV** Sickness in Family      **EM** Emergency Leave      **FBR** From Sick Bank  
**VAC2** Vacation Excess      **SICP** Sick Pay      **TLAY** Tempory Layoff      **VACV** Vacation Payout      **EM** Emergency Leave      **FBR** From Sick Bank  
**VAC1** Vacation Taken      **VG-1** Vacation Taken & Paid      **PTO** PTO Excess      **PT** Personal Time      **PTO** PTO Taken      **VCE** Vacation Excess

## Sample Report – Attendance Calendar Weekly

Time: 1:04:49 PM WEEKLY EMPLOYEE ATTENDANCE CALENDAR RZAttCAW

	Saturday 03/15/2014	Sunday 03/16/2014	Monday 03/17/2014	Tuesday 03/18/2014	Wednesday 03/19/2014	Thursday 03/20/2014	Friday 03/21/2014
Abbott, John	SAT 0	SUN					
Abel, Samantha	SAT	SUN			S	S	S
Adams, Karen	SAT	SUN			VC-1	VC-2	VC-2
Adams, Jennifer	SAT	SUN					
Armstrong-Smith, Grant	SAT	SUN					
Brown, Thomas	SAT	SUN	7.5 TLAY	7.5 TLAY	7.5 TLAY	7.5 TLAY	7.5 TLAY
Browning, Janice	SAT	SUN					
Darkey, Pat	SAT	SUN					

**BT** Bereavement      **COVR** Court      **CT** Line Taken      **OT** Line Excess      **REG** Regular      **SICK** Sick  
**ST** Summer Holiday      **DSM** Unpaid Sick      **VAC** Vacation      **WCB** WCB/Leave Time      **ST** PT Not Taken      **STP** PT Not Excess  
**REG2** Regular Contingency      **LOA** Leave of Absence      **FTD** Paid Day      **OT15** Line Excess @ 1.5      **W** Comp Served      **STP** PT Not Excess  
**OT15** 15% PTO WARD COMP      **SOUL** VAC      **TOL** (Other than Vacation)      **IR** Int      **OV** Paid Overtime      **D** Days      **CTF** CT Ferried Hours  
**REGW** Regular Week Worked      **ERA** ERA      **FLEX** Flex      **SICV** Sickness in Family      **EM** Emergency Leave      **FBR** From Sick Bank  
**VAC2** Vacation Excess      **SICP** Sick Pay      **TLAY** Tempory Layoff      **VACV** Vacation Payout      **EM** Emergency Leave      **FBR** From Sick Bank  
**VAC1** Vacation Taken      **VG-1** Vacation Taken & Paid      **PTO** PTO Excess      **PT** Personal Time      **PTO** PTO Taken      **VCE** Vacation Excess

## Sample Report – Attendance Calendar Rolling

Time: 1:09:38 PM ANNUAL EMPLOYEE ATTENDANCE CALENDAR RZAttCAL  
As of Oct 01, 2013 through Jun 30, 2014

Abbott, John - (11026)

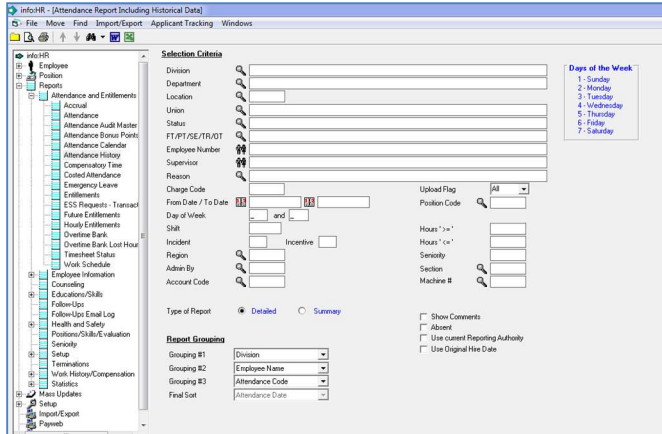
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
October 2013	SAT	SUN																													
November 2013	SAT	SUN																													
December 2013	SUN																														
January 2014																															
February 2014																															
March 2014																															
April 2014																															
May 2014																															
June 2014																															

**BT** Bereavement      **COVR** Court      **CT** Line Taken      **OT** Line Excess      **REG** Regular      **SICK** Sick  
**ST** Summer Holiday      **DSM** Unpaid Sick      **VAC** Vacation      **WCB** WCB/Leave Time      **ST** PT Not Taken      **STP** PT Not Excess  
**REG2** Regular Contingency      **LOA** Leave of Absence      **FTD** Paid Day      **OT15** Line Excess @ 1.5      **W** Comp Served      **STP** PT Not Excess  
**OT15** 15% PTO WARD COMP      **SOUL** VAC      **TOL** (Other than Vacation)      **IR** Int      **OV** Paid Overtime      **D** Days      **CTF** CT Ferried Hours  
**REGW** Regular Week Worked      **ERA** ERA      **FLEX** Flex      **SICV** Sickness in Family      **EM** Emergency Leave      **FBR** From Sick Bank  
**VAC2** Vacation Excess      **SICP** Sick Pay      **TLAY** Tempory Layoff      **VACV** Vacation Payout      **EM** Emergency Leave      **FBR** From Sick Bank  
**VAC1** Vacation Taken      **VG-1** Vacation Taken & Paid      **PTO** PTO Excess      **PT** Personal Time      **PTO** PTO Taken      **VCE** Vacation Excess

## Attendance History

The purpose of this report is to help the user view attendance history details for all employees. This report looks at data captured in the Attendance History. Depending on the selection criteria you may choose to include current Attendance in the report.

### Screen Layout



This report shares the same Selection Criteria as the Attendance Report except that it includes both non-archived and archived records.

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## Sample Report – Attendance Detailed

Time: 11:34:39 AM		Attendance Report Including Historical Data As of 01/01/2011 through 30/04/2011							RZATTDHD	
Employee Nbr/Name	Reason	Date	Day of Week	Hours	Days	Charge Code	Inc.	Incentive	Sen.	
221026	Abbott, John			4.00	0.50		N	No	Y	
	<b>Totals for</b>	<b>Vacation</b>		<b>4.00</b>	<b>0.50</b>					
	<b>Totals for</b>	<b>Abbott, John</b>		<b>4.00</b>	<b>0.50</b>					
1051	Adams, Karen			2.00	0.25		N	No	N	
	<b>Totals for</b>	<b>Comp time earned</b>		<b>2.00</b>	<b>0.25</b>					
1051	Adams, Karen			5.00	0.63		N	No	Y	
				10.00	1.25		N	No	Y	
				8.00	1.00		N	No	Y	
				5.00	0.63		N	No	Y	
				7.00	0.88		N	No	Y	
				7.00	0.88		N	No	Y	
				7.00	0.88		N	No	Y	
	<b>Totals for</b>	<b>Vacation</b>		<b>49.00</b>	<b>6.13</b>					
	<b>Totals for</b>	<b>Adams, Karen</b>		<b>51.00</b>	<b>6.38</b>					
1014	Anderson, Dane			4.00	0.40		N	No	Y	
	<b>Totals for</b>	<b>Vacation</b>		<b>4.00</b>	<b>0.40</b>					
	<b>Totals for</b>	<b>Anderson, Dane</b>		<b>4.00</b>	<b>0.40</b>					
1050	Armstrong, Bob			4.00	0.50		N	No	N	
				3.00	0.38		N	No	N	
	<b>Totals for</b>	<b>Comp time earned</b>		<b>7.00</b>	<b>0.88</b>					
1050	Armstrong, Bob			3.50	0.44		N	No	Y	

## Sample Report – Attendance Summary

Time: 1:12:50 PM		Attendance Summary Report Including Historical Data No date entered			RZATTDHS	
Employee Nbr. / Name	Reason	Hours	Days	Incident		
11026	Abbott, John	2.00	0.25			
11026	Abbott, John	26.00	3.25			
11026	Abbott, John	24.00	3.00			
11026	Abbott, John	86.00	10.75			
11026	Abbott, John	46.00	5.75			
11026	Abbott, John	148.00	18.50			
11026	Abbott, John	1,293.50	161.69			
	<b>Totals for</b>	<b>Abbott, John</b>	<b>1,625.50</b>	<b>203.19</b>		
3011	Abel, Samantha	8.00	1.00			
3011	Abel, Samantha	5.00	0.63			
3011	Abel, Samantha	124.00	15.50			
	<b>Totals for</b>	<b>Abel, Samantha</b>	<b>137.00</b>	<b>17.13</b>		
1051	Adams, Karen	32.00	4.00			
1051	Adams, Karen	11.00	1.38			
1051	Adams, Karen	2.00	0.25			
1051	Adams, Karen	184.00	23.00	1		
1051	Adams, Karen	540.00	67.50			
	<b>Totals for</b>	<b>Adams, Karen</b>	<b>769.00</b>	<b>96.13</b>	<b>1</b>	

## Compensatory Time

The purpose of this report is to list all compensatory time earned and taken for employees. Compensatory Time is the time taken off in lieu of being paid overtime. Overtime hours are recorded in the Attendance function for all Attendance Reason Codes that begin with "OT". Hours taken off in lieu of being paid overtime are recorded using Attendance Reason Codes beginning with "CT".

This report calculates and displays the balance, i.e., compensatory time outstanding for each employee or group of employees selected. The balance is calculated by subtracting the number of CT hours from the number of OT hours for the From/To Date range entered on the Compensatory Time Report Selection Criteria grid.

Choose the Detail option to have the system displays the dates on which the OT and CT were taken for each employee or group of employees. The Summary displays a one-line summation of OT, CT, and Balance for each employee or group of employees selected.

## Screen Layout

The screenshot shows the 'info:HR - [Compensatory Time Report]' application window. The interface includes a navigation tree on the left with 'Compensatory Time' selected. The main area contains 'Selection Criteria' and 'Report Grouping' sections. The 'Selection Criteria' section includes fields for Division, Department, Location, Union, Status, FT/PT/SE/TR/OT, Employee Number, Reporting Authority, From Date / To Date, Region, Admin By, Earned/Not Taken Within, Charge Code, Position Group, Shift, Section, and O/S Hours Exceeded. The 'Report Grouping' section includes dropdowns for Grouping #1, #2, and #3, and a Final Sort dropdown. The 'Type of Report' section has radio buttons for 'Detailed' (selected) and 'Summary', and a checkbox for 'Include Attendance History'.

- **Type of Report** – A **Detailed** report will list each day of the week the attendance code was used. A **Summary** report will tally up the hours and give the total value.
- If checked, **Include Attendance History** will show attendance details from both the current attendance and attendance history screens.



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## Sample Report – Compensatory Time Detailed

Time: 1:14:16 PM		Detailed Compensatory Time Report				RZCOMPTD			
Employee Nbr/Name	Reporting Authority	Day of Week	Date	*** In Hours ***			Balance In		
				Earned	Taken	Balance	Equivalent Days		
3011 Abel, Samantha	Browning, Janice	Monday	6/02/14	5.00	0.00	5.00	0.63		
<b>Totals for:</b>		<b>Abel, Samantha</b>		<b>5.00</b>	<b>0.00</b>	<b>5.00</b>	<b>0.63</b>		
8524 Wessler, Johnaton	Abbott, John	Friday	12/06/13		2.00	-2.00	-0.27		
<b>Totals for:</b>		<b>Wessler, Johnaton</b>		<b>0.00</b>	<b>2.00</b>	<b>-2.00</b>	<b>-0.27</b>		
<b>Total For Company:</b>				<b>5.00</b>	<b>2.00</b>	<b>3.00</b>	<b>0.36</b>		

## Sample Report – Compensatory Time Summary

Time: 11:43:01 AM		Summarized Compensatory Time Report				RZCOMFS1	
Employee Nbr/Name	Reporting Authority	*** In Hours ***			Balance In		Extended Cost
		Earned	Taken	Balance	Equivalent Days		
221026 Abbott, John	Armstrong, Bob	13.00	4.00	9.00	1.13	415.98	
1014 Anderson, Dane	King, Deborah	12.00	0.00	12.00	1.20	239.40	
1050 Armstrong, Bob	Abbott, John	17.00	1.00	16.00	2.00	623.04	
5000 Haile, Jenny	Drac, Jeri	2.00	1.50	0.50	0.06	14.00	
1053 Mansglebe, Jayne	King, Deborah	4.00	1.00	3.00	0.38	29.19	
1027 Saunders, Carey	Drac, Jeri	1.50	0.50	1.00	0.13	43.79	
<b>Total For Company:</b>		<b>49.50</b>	<b>8.00</b>	<b>41.50</b>	<b>4.89</b>	<b>1,365.40</b>	

## Costed Attendance

This is used to view an attendance/absenteeism report for the current year and includes labour costs. So, for example, you can generate a report that tells you what sick time costs are in terms of lost working hours.

The costing formula is: Attendance Hours multiplied by Employee's Per Hour Salary. If the employee is not paid on an hourly basis the report calculates the effective hourly rate using the salary.

The Selection Criteria and Report Groupings option are the same as that of the Attendance Master and Attendance History Reports.

## Screen Layout

The screenshot displays the 'info:HR - [Costed Attendance Report]' application window. The interface includes a navigation tree on the left with categories like Employee, Position, Results, and Attendance and Entitlements. The main area is divided into 'Selection Criteria' and 'Report Groupings'. The 'Selection Criteria' section contains fields for Division, Department, Location, Union, Status, Category, Employee Number, Supervisor, Reason, Charge Code, From Date / To Date, Day of Week, Shift, Incident, Region, Administered By, and Program. The 'Report Groupings' section includes dropdowns for Grouping #1 (Division), Grouping #2 (Employee Name), Grouping #3 (Attendance Code), and Final Sort (Attendance Date). There are also checkboxes for 'Type of Report' (Detailed/Summary), 'Employee Totals Only', 'Show Comments', 'Absent', 'Use current Reporting Authority', 'Include Historical Rates', 'Include Attendance History', and 'Include Terminated Employees'. A 'Days of the Week' legend in the top right corner lists days 1-7: 1-Sunday, 2-Monday, 3-Tuesday, 4-Wednesday, 5-Thursday, 6-Friday, 7-Saturday.

- The **Day of the Week** allows you to use the legend in the top right hand corner to view specific days that attendance codes have been used. For example, If you want to know who is sick on Monday and Fridays, you will enter 2 and 6 in **Day of the Week**.
- **Type of Report** – A **Detailed** report will list each day of the week the attendance code was used. A **Summary** report will tally up the hours and give the total value.
- **Cost at Historical Rates** defaults to being checked off. If checked, the system will look at the rate of pay when the attendance data was entered, not the current rate of pay.

# info:HR Reports User Manual

## Sample Report –Costed Attendance Detailed

Time: 11:53:43 A		Costed Attendance Report							RZATTCHT	
		As of 01/04/2013 through 30/04/2013								
Employee Nbr/Name	Reason	Date	Day of Week	Hours	Days	Costs	Charge Code	Inc.	Incentive	Sen.
221026 Abbott, John	Comp time earned	01/04/2013	Monday	5.00	0.63	231.10		N	No	N
	<b>Total for Comp time earned</b>			<b>5.00</b>	<b>0.63</b>	<b>231.10</b>				
221026 Abbott, John	Course	04/04/2013	Thursday	7.00	0.88	323.54		N	No	N
	<b>Total for Course</b>			<b>7.00</b>	<b>0.88</b>	<b>323.54</b>				
221026 Abbott, John	Vacation	09/04/2013	Tuesday	7.00	0.88	323.54		N	No	Y
	<b>Total for Vacation</b>			<b>7.00</b>	<b>0.88</b>	<b>323.54</b>				
	<b>Total for Abbott, John</b>			<b>19.00</b>	<b>2.38</b>	<b>878.18</b>			<b>0</b>	
1013 Brown, Thomas	Vacation	22/04/2013	Monday	7.00	0.88	135.62		N	No	Y
		19/04/2013	Friday	7.00	0.88	135.62		N	No	Y
		18/04/2013	Thursday	7.00	0.88	135.62		N	No	Y
		17/04/2013	Wednesda	7.00	0.88	135.62		N	No	Y
	<b>Total for Vacation</b>			<b>28.00</b>	<b>3.50</b>	<b>542.08</b>				
	<b>Total for Brown, Thomas</b>			<b>28.00</b>	<b>3.50</b>	<b>542.08</b>			<b>0</b>	
5000 Haile, Jenny	Comp time earned	15/04/2013	Monday	2.00	0.25	56.00		N	No	N
	<b>Total for Comp time earned</b>			<b>2.00</b>	<b>0.25</b>	<b>56.00</b>				
5000 Haile, Jenny	Comp time taken	18/04/2013	Thursday	1.50	0.19	42.00		N	No	N
	<b>Total for Comp time taken</b>			<b>1.50</b>	<b>0.19</b>	<b>42.00</b>				
	<b>Total for Haile, Jenny</b>			<b>3.50</b>	<b>0.44</b>	<b>98.00</b>			<b>0</b>	
1012 King, Deborah	Conference	24/04/2013	Wednesda	7.00	0.88	336.56		N	No	N
	<b>Total for Conference</b>			<b>7.00</b>	<b>0.88</b>	<b>336.56</b>				

## Sample Report – Costed Attendance Summary

Time: 2:03:40 PM		Costed Attendance Summary Report					RZATTCHS
		No date entered					
Employee Nbr. / Name	Reason	Hours	Days	Costs	Incident		
78831 Adams on, Jennifer	Vacation Payout	80.00	10.00	0.00			
78831 Adams on, Jennifer	Vacation Earned	80.00	10.00	0.00			
	<b>Total for Adamson, Jennifer</b>	<b>256.00</b>	<b>32.00</b>	<b>208.48</b>			
1050 Armstrong-Smith, Grant	Couse	180.00	22.50	3,675.36			
1050 Armstrong-Smith, Grant	Lieu Taken	24.50	3.06	826.10			
1050 Armstrong-Smith, Grant	Float Day	79.00	9.88	1,707.21			
1050 Armstrong-Smith, Grant	Jerry	9.00	1.13	368.01			
1050 Armstrong-Smith, Grant	Lieu Earned	75.75	9.47	1,710.27			
1050 Armstrong-Smith, Grant	Lieu Banked @ 1.5	30.00	3.75	1,226.70			
1050 Armstrong-Smith, Grant	BRING FORWARD COMP HOURS	6.00	0.75	245.34			
1050 Armstrong-Smith, Grant	PTO Taken	8.00	1.00	343.44			
1050 Armstrong-Smith, Grant	PTO Earned	0.00	0.00	0.00			
1050 Armstrong-Smith, Grant	Regular	62.00	7.75	981.36			
1050 Armstrong-Smith, Grant	Sick	718.00	89.50	22,156.92			
1050 Armstrong-Smith, Grant	Sick Payout	64.00	8.00	2,616.96			
1050 Armstrong-Smith, Grant	Statutory Holiday	192.00	24.00	6,897.36			
1050 Armstrong-Smith, Grant	Vacation	1,015.00	126.88	36,208.93			
1050 Armstrong-Smith, Grant	Vacation Payout	96.00	12.00	3,925.44			
1050 Armstrong-Smith, Grant	Vacation Earned	200.00	25.00	8,586.00			
1050 Armstrong-Smith, Grant	Comp Earned	26.00	3.25	1,053.14			
1050 Armstrong-Smith, Grant	WCB/Lost Time	16.00	2.00	0.00			
	<b>Total for Armstrong-Smith, Grant</b>	<b>2,799.25</b>	<b>349.91</b>	<b>92,417.54</b>			

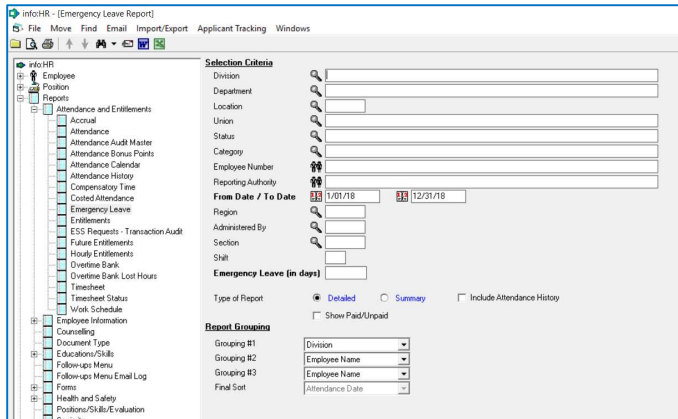
## Sample Report – Employee Totals Only

Time: 10:40:25 AM		Costed Attendance - Employee Totals Report			RZATTCHS'
No date entered					
Employee Nbr. / Name	Hours	Days	Costs	Incid	
221026 Abbott, John	42.00	5.25	2,124.00		
<b>Total for Abbott, John</b>	<b>42.00</b>	<b>5.25</b>	<b>2,124.00</b>		
3001 Abel, Alex	196.00	24.50	5,455.31		
<b>Total for Abel, Alex</b>	<b>196.00</b>	<b>24.50</b>	<b>5,455.31</b>		
1014 Anderson, Dane	36.00	4.50	204.63		
<b>Total for Anderson, Dane</b>	<b>36.00</b>	<b>4.50</b>	<b>204.63</b>		
1050 Armstrong, Bob	75.00	9.38	3,116.28		
<b>Total for Armstrong, Bob</b>	<b>75.00</b>	<b>9.38</b>	<b>3,116.28</b>		
2028 Browning, Janice	18.00	2.25	352.00		
<b>Total for Browning, Janice</b>	<b>18.00</b>	<b>2.25</b>	<b>352.00</b>		
1054 Harper, Betsy	5.00	0.63	69.10		
<b>Total for Harper, Betsy</b>	<b>5.00</b>	<b>0.63</b>	<b>69.10</b>		
1012 King, Deborah	2.00	0.25	0.00		
<b>Total for King, Deborah</b>	<b>2.00</b>	<b>0.25</b>	<b>0.00</b>		
2210 O'Hara, Jeri	7.00	0.93	167.79		
<b>Total for O'Hara, Jeri</b>	<b>7.00</b>	<b>0.93</b>	<b>167.79</b>		
5984 Sartre, Mary-Ellen	10.25	1.28	232.06		
<b>Total for Sartre, Mary-Ellen</b>	<b>10.25</b>	<b>1.28</b>	<b>232.06</b>		
11011 YOUNG, YOGI	83.50		951.72		
<b>Total for YOUNG, YOGI</b>	<b>83.50</b>		<b>951.72</b>		
<b>Grand Totals:</b>	<b>474.75</b>	<b>48.96</b>	<b>12,672.89</b>		

## Emergency Leave

This report displays the Emergency Leave taken for each of the selected employees and shows the balance of Emergency Leave. The user must enter the **Emergency Leave (in days)**. The employees' outstanding balances will be calculated by subtracting their leave taken from this amount. If an employee does not have hours per day set up for their current position, they will be excluded on this report.

### Screen Layout



- **Type of Report** – A **Detailed** report will list each day of the week the attendance code was used. A **Summary** report will tally up the hours and give the total value.
- If checked, **Include Attendance History** will show attendance details in the current attendance screen and attendance history.

### Sample Report – Emergency Leave Report Detailed

Time: 1:59:44 PM		Detailed Emergency Leave Report				RZEMELED
As of 6/01/14 through 12/31/14						
<b>Emergency Leave</b>	<b>10.00</b>					
Employee Nbr/Name	Reason	Date	Hours Taken	Days Taken	Outstanding	
11026 Abbott, John	Emergency Leave	7/18/14	16.00	2.00		
<b>Totals for: Abbott, John</b>			16.00	2.00	8.00	
<b>Total For Company:</b>			<b>16.00</b>	<b>2.00</b>	<b>8.00</b>	

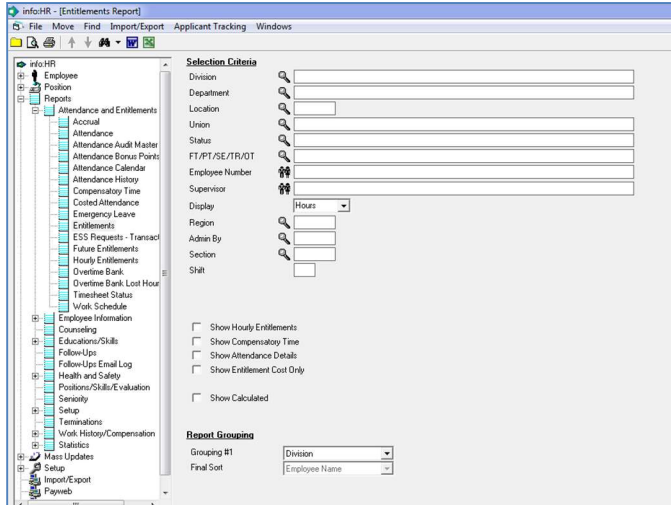
### Sample Report – Emergency Leave Summary

Time: 1:57:30 PM		Summarized Emergency Leave Report				RZEMELES
As of 1/01/14 through 12/31/14						
<b>Emergency Leave</b>	<b>10.00</b>					
Employee Nbr/Name	Position	Hours Taken	Days Taken	Outstanding		
11026 Abbott, John	Chief Information Officer	16.00	2.00	8.00		
3011 Abel, Samantha	HR Generalist	8.00	1.00	9.00		
1231 Sampson, Harry	Receptionist	152.00	19.00	-9.00		
5505 Smith, Jane	Developer	704.00	88.00	-78.00		
<b>Total For Company:</b>		<b>880.00</b>	<b>110.00</b>	<b>-70.00</b>		

## Entitlements

When this report is generated, the system subtracts the time recorded in Attendance from the earned entitlements and displays the amounts outstanding for the From and To Dates.

### Screen Layout



- This report can **Display** Entitlements in Hours or Days by using the drop down.
- **Show Hourly Entitlements** will include any hourly entitlements that are set up for employees.
- **Show Compensatory Time** will include the earned, taken and outstanding balance of comp time.
- **Show Attendance Detail** will list days taken for each of the entitlements.
- **Show Entitlement Cost Only** gives the extended cost associated with the entitlement based on the employee's current rate of pay.
- **Show Calculated** is used if entitlements are given on a monthly basis. This will give the value of the entire year's entitlement.

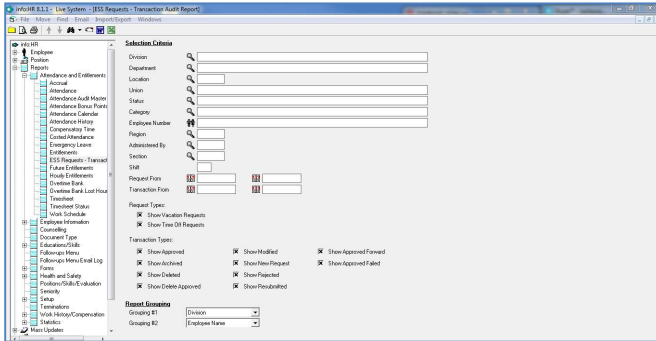
### Sample Report – Hourly Entitlements with Compensatory Time

Time: 2:05:28 PM		Vacation and Sick Time Information in Hours (Includes The Hourly Information)				RZENTHR7
<b>Abbott, John</b> EXCEEDED						
<b>Vacation Time</b>	<b>Previous Year</b>	<b>Current Year</b>	<b>Taken</b>	<b>Outstanding</b>	<b>Date Range</b>	
	152.00	480.00	32.00	600.00	3/15/14 TO 3/14/15	
<b>Sick Time</b>	<b>Previous Year</b>	<b>Current Year</b>	<b>Taken</b>	<b>Outstanding</b>	<b>Date Range</b>	
	0.00	12.00	28.00	-16.00	1/01/14 TO 12/31/14	
<b>Hourly Entitlements</b>		<b>Data Range</b>	<b>Previous</b>	<b>Entitled</b>	<b>Taken</b>	<b>Outstanding</b>
Float Day		4/01/13 TO 3/31/14	0.00	80.00		
Couse		1/01/13 TO 12/31/13	0.00	100.00		
Float Day		4/01/14 TO 3/31/15	80.00	0.00		
PTO Earned		1/01/14 TO 1/03/14	0.00	0.00		
Vacation Earned		1/01/14 TO 12/31/14	0.00	200.00	24.00	176.00
<b>COMPENSATORY TIME</b>				122.00	46.00	76.00
<b>Abel, Samantha</b>						
<b>Vacation Time</b>	<b>Previous Year</b>	<b>Current Year</b>	<b>Taken</b>	<b>Outstanding</b>	<b>Date Range</b>	
	116.00	320.22	112.00	324.22	6/01/14 TO 5/31/15	
<b>Sick Time</b>	<b>Previous Year</b>	<b>Current Year</b>	<b>Taken</b>	<b>Outstanding</b>	<b>Date Range</b>	
	80.00	12.00	0.00	92.00	1/01/14 TO 12/31/14	
<b>Hourly Entitlements</b>				<b>Entitled</b>	<b>Taken</b>	<b>Outstanding</b>
<b>COMPENSATORY TIME</b>				5.00	0.00	5.00

## ESS Requests – Transaction Audit

This report is used to view all ESS requests that have been created for Vacation or Time Off. When an employee makes a Vacation or Time Off request the system assigns a request ID and the request will be logged in the system. Your organization must be using the ESS module to produce this report.

### Screen Layout



- This report will display transactions by either **Vacation Request Date** or by **Transaction Date**. Use the appropriate date range to view requests.
- **Show Vacation Requests** will show Vacation Requests only.
- **Show Time Off Request** will show Time Off Requests only.
- Check both if you would like to see both Vacation and Time Off Requests on the same report.
- **Transaction Types** allows the user to select the transaction types desired.

### Sample Report – ESS Transactions Vacation and Time Off Requests

Request ID	Request Type	From Date	To Date	Reason	Hours	Trans. Type	Supervisor Email	Action	By Whom	Date of Action	Time of Action
<b>Employee: 221026 Abbott, John</b>											
207	VR	3/16/2015	3/20/2015	VAC	8.00	NR	jabbott@hrss.com	Abbott, John Created a request.	221026	3/25/2015	3:26:00PM
207	VR	3/16/2015	3/20/2015	VAC	8.00	AP	jabbott@hrss.com	Abbott, John Approved request.	221026	3/25/2015	3:29:00PM
<b>Employee: 221026 Abbott, John</b>											
208	TR	3/2/2015	3/2/2015	OT	3.00	NR	jabbott@hrss.com	Abbott, John Created a request.	221026	3/25/2015	3:27:00PM
208	TR	3/2/2015	3/2/2015	OT	2.00	MB	jabbott@hrss.com	Abbott, John Updated a request.	221026	3/25/2015	3:32:00PM
208	TR	3/2/2015	3/2/2015	OT	2.00	AP	jabbott@hrss.com	Abbott, John Approved request.	221026	4/22/2015	12:44:00PM
<b>Employee: 221026 Abbott, John</b>											
209	TR	3/13/2015	3/13/2015	SICF	8.00	NR	jabbott@hrss.com	Abbott, John Created a request.	221026	3/25/2015	3:28:00PM
209	TR	3/13/2015	3/13/2015	SICF	8.00	AP	jabbott@hrss.com	Abbott, John Approved request.	221026	3/25/2015	3:29:00PM
<b>Employee: 221026 Abbott, John</b>											
210	TR	3/10/2015	3/10/2015	LATE	1.00	NR	jabbott@hrss.com	Abbott, John Created a request.	221026	3/25/2015	3:28:00PM
210	TR	3/10/2015	3/10/2015	LATE	1.00	RJ	jabbott@hrss.com	Abbott, John Rejected request.	221026	3/25/2015	3:30:00PM

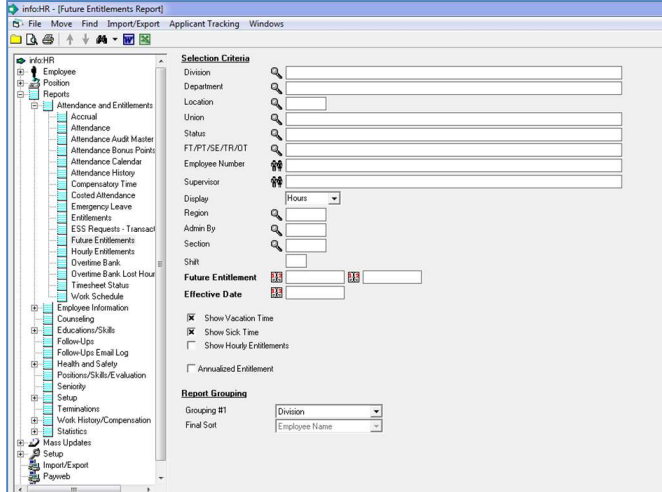
**Request Types:**  
 TR - Time Off Request    VR - Vacation Request

**Transaction Types:**  
 DA - Delete Approved    NR - New Request    RS - Resubmitted    AR - Archived    MB - Modified    DB - Deleted  
 AP - Approved    RJ - Rejected    APF - Approved Failed    AF - Approve/Forward

## Future Entitlements

The purpose of this report is to show the projected amount of vacation, sick and hourly entitlements for a given time frame for any year in the future. This report is displayed in Excel.

### Screen Layout



- This report can **Display** Entitlements in Hours or Days by using the drop down.
- A **Future Entitlement Date** range must be entered, e.g. January 1-December 31, 2014.
- An **Effective Date** must be entered. This is the date you want to base the future entitlement calculation on. For example, as of January 1, 2014 you want to know what your employee's entitlements will be.
- **Show Vacation Time** will display the vacation entitlement.
- **Show Sick Time** will display the sick entitlement.
- **Show Hourly Entitlement** will display all hourly entitlements.

### Sample Report – Future Entitlements Showing Vacation, Sick and Hourly Entitlements

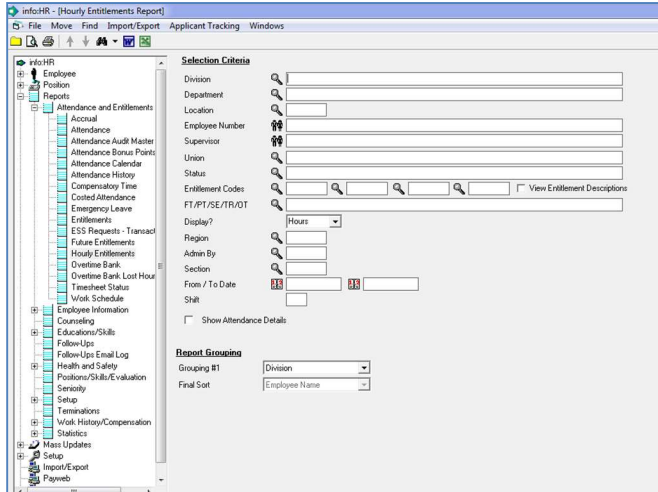
Future Entitlements									
Employee	Entitlement Dates	Vacation	Sick	actor	appointme	lex hours	earne	loating days	Moving day
Date: May 05, 2013									
Time: 12:39:27									
Group by (none)									
Entitlements									
Abbott, John	12/01/2013 - 12/31/2013	240.00	40.00	17.50	0.00	24.00	1.88		
	01/01/2014 - 01/31/2014	240.00							
	02/01/2014 - 02/28/2014	240.00							
	03/01/2014 - 03/31/2014	240.00							
	04/01/2014 - 04/30/2014	240.00							
	05/01/2014 - 05/31/2014	240.00							
	06/01/2014 - 06/30/2014	240.00							
	07/01/2014 - 07/31/2014	240.00							
	<b>Total</b>	<b>1920.00</b>	<b>40.00</b>						
Adams, Karen	12/01/2013 - 12/31/2013	240.00	120.00	17.50	0.00	24.00	1.88		
	01/01/2014 - 01/31/2014	240.00							
	02/01/2014 - 02/28/2014	240.00							
	03/01/2014 - 03/31/2014	240.00							
	04/01/2014 - 04/30/2014	240.00							
	05/01/2014 - 05/31/2014	240.00							
	06/01/2014 - 06/30/2014	240.00							
	07/01/2014 - 07/31/2014	240.00							
	<b>Total</b>	<b>5760.00</b>	<b>120.00</b>						



## Hourly Entitlements

The purpose of this report to view hourly entitlement details for employees. Hourly Entitlements are time off entitlements other than Vacation and Sick, such as Float Days.

### Screen Layout



- This report can **Display** Entitlements in Hours or Days by using the drop down.
- Specific hourly entitlement codes can be selected, if left blank all will appear on the report.
- **Show Attendance Detail** will list days taken for each entitlements.

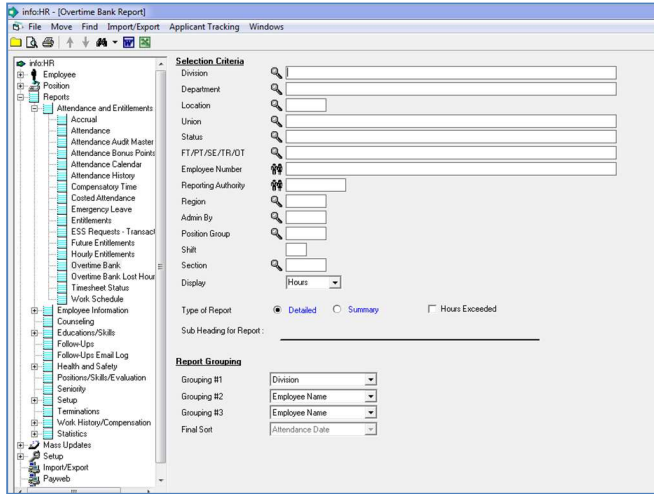
### Sample Report – Hourly Entitlements

Time: 12:58:20 PM		Hourly Entitlements in Days				RZHEN1DS		
Employee Name	Entitlement	Previous	Entitled	Taken	Outstanding	Date Range		COE
Abbott, John	Floating days off	0.00	3.00	0.00	3.00	01/01/2012	31/12/2012	Yes
	Flex hours earned	0.00	0.00	0.00	0.00	01/01/2012	31/12/2012	Yes
	Late	0.00	0.25	0.00	0.25	01/01/2012	31/12/2012	Yes
	Moving day	0.00	0.23	0.00	0.23	01/01/2012	31/12/2012	Yes
	Planned vacation	0.00	25.00	0.00	25.00	01/01/2012	31/12/2012	Yes
Adams, Karen	Sick	0.00	10.00	0.00	10.00	01/01/2012	31/12/2012	Yes
	Floating days off	0.00	2.63	0.00	2.63	01/01/2012	31/12/2012	Yes
	Flex hours earned	0.00	0.00	0.00	0.00	01/01/2012	31/12/2012	Yes
	Late	0.00	0.25	0.00	0.25	01/01/2012	31/12/2012	Yes
	Moving day	0.00	0.23	0.00	0.23	01/01/2012	31/12/2012	Yes
Anderson, Dane	Sick	0.00	8.75	0.00	8.75	01/01/2012	31/12/2012	Yes
	Floating days off	0.00	3.00	0.00	3.00	01/01/2012	31/12/2012	Yes
	Flex hours earned	0.00	0.00	0.00	0.00	01/01/2012	31/12/2012	Yes
	Late	0.00	0.20	0.00	0.20	01/01/2012	31/12/2012	Yes
	Moving day	0.00	0.19	0.00	0.19	01/01/2012	31/12/2012	Yes
Armstrong, Bob	Sick	0.00	10.00	0.00	10.00	01/01/2012	31/12/2012	Yes
	Floating days off	0.00	3.50	2.88	0.63	01/01/2012	31/12/2012	Yes
	Flex hours earned	0.00	0.00	0.00	0.00	01/01/2012	31/12/2012	Yes
	Late	0.00	0.25	0.25	0.00	01/01/2012	31/12/2012	Yes
	Moving day	0.00	0.23	1.00	-0.77	01/01/2012	31/12/2012	Yes
Exceeded	Planned vacation	0.00	26.25	0.00	26.25	01/01/2012	31/12/2012	Yes
	Sick	0.00	8.75	0.00	8.75	01/01/2012	31/12/2012	Yes

## Overtime Bank

The purpose of this report is to help the user view a summary of the Overtime Bank. This report will show any carry over from last year, what has been earned to date, what has been taken, an outstanding balance, and the maximum hours that can be banked.

### Screen Layout



- This report can **Display** Entitlements in Hours or Days by using the drop down.
- **Type of Report** – A **Detailed** report will list each day of the week the attendance code was used. A **Summary** report will tally up the hours and give the total value.
- If **Hours Exceeded** is checked, the report will show only employees who have exceeded the maximum allotment of banked hours.
- A **Sub Heading to Report** may be entered if you would like to have a secondary title on the report.

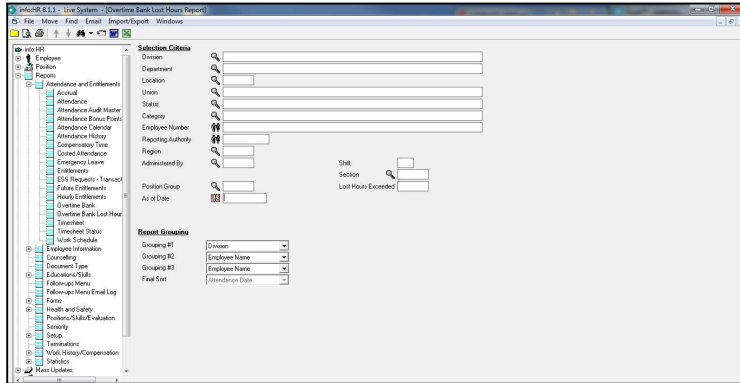
### Sample Report – Summary Overtime Bank

Time: 2:39:01 PM		Summarized Overtime Bank Report in Hours					R2 OV TBS1	
Employee Nbr/Name	Reporting Authority	Earned				Max. OT		
		Previous	Current	Taken	Balance	Available	Bank	
221026 Abbott, John	Armstrong, Bob	0.00	8.00	4.00	4.00	32.00	40.00	
1051 Adams, Karen	Armstrong, Bob	0.00	0.00	0.00	0.00	24.00	24.00	
1051 Adams, Karen	Brown, Thomas	0.00	0.00	0.00	0.00	24.00	24.00	
1051 Adams, Karen	Brown, Thomas	0.00	0.00	0.00	0.00	24.00	24.00	
1014 Anderson, Dane	King, Deborah	0.00	0.00	0.00	0.00	40.00	40.00	
1050 Armstrong, Bob	Abbott, John	10.00	7.00	1.00	16.00	33.00	40.00	
1013 Brown, Thomas	Abbott, John	0.00	0.00	0.00	0.00	40.00	40.00	
2210 Drac, Jeri	Abbott, John	0.00	0.00	0.00	0.00	40.00	40.00	
5000 Haile, Jenny	Drac, Jeri	40.00	0.00	0.00	40.00	24.00	24.00	
5001 Haile, William	Sartre, Mary-Ellen	0.00	0.00	0.00	0.00	24.00	24.00	
1054 Harper, Betsy	Sartre, Mary-Ellen	12.00	0.00	0.00	12.00	40.00	40.00	
1012 King, Deborah	Abbott, John	0.00	0.00	0.00	0.00	40.00	40.00	
1052 Mansfield, Katherine	Armstrong, Bob	0.00	0.00	0.00	0.00	40.00	40.00	
1053 Manglebe, Jayne	King, Deborah	0.00	0.00	0.00	0.00	40.00	40.00	
10231 Sampson, Harry	Drac, Jeri	0.00	0.00	0.00	0.00	24.00	24.00	
5984 Sartre, Mary-Ellen	Abbott, John	0.00	0.00	0.00	0.00	40.00	40.00	
1027 Saunders, Carey	Drac, Jeri	0.00	0.00	0.00	0.00	40.00	40.00	
<b>Total For Company:</b>		<b>62.00</b>	<b>15.00</b>	<b>5.00</b>	<b>72.00</b>	<b>569.00</b>	<b>584.00</b>	

## Overtime Bank Lost Hours

The purpose of this report is to view the hours of overtime which were worked by an employee that exceeds the maximum Overtime Bank. The Overtime Bank must be set up to produce this report.

### Screen Layout



- **As of Date** allows you to enter a date up to which you would like to view the lost hours.
- **Lost Hours Exceeded** provides the ability to view hours in excess of the value entered.
  - Example: if you would like to see how many employees lost more than 5 hours you would enter 5 in this field and only those employees with more than 5 lost hours will be reported.

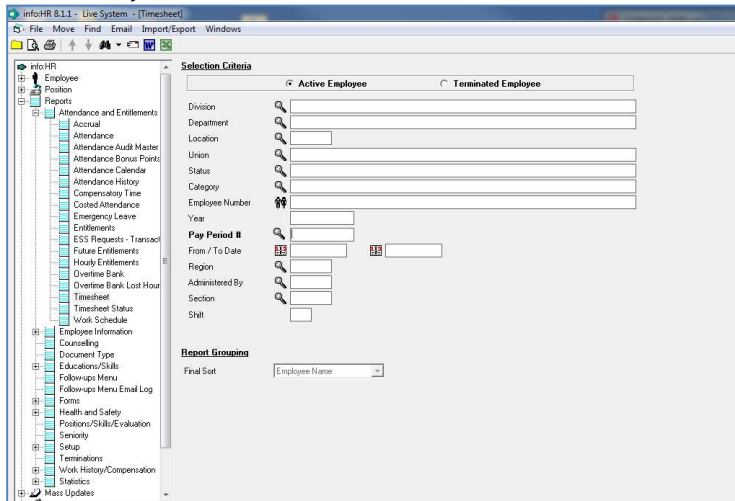
### Sample Report – Lost Hours Report

Time: 1:55:26 PM		Possible Previous Year Lost Hours Report				RZOTL051
		As of Date: 05/06/2013				
Employee Nbr/Name	Previous	Banked	*** In Hours ***		Lost Hours	
			Taken	Outstanding		
11026 Abbott, John	6.00	48.00	12.00	42.00	8.00	
<b>Total For Company:</b>	<b>6.00</b>	<b>48.00</b>	<b>12.00</b>	<b>42.00</b>	<b>8.00</b>	

## Timesheet

The purpose of this report is to view the hours entered on a Timesheet for a given pay period.

### Screen Layout



- **Pay Period #** allows you to select a pay period to be viewed.

### Sample Report

Time: 12:02:09 PM RZTimesheet

**TIMESHEET**

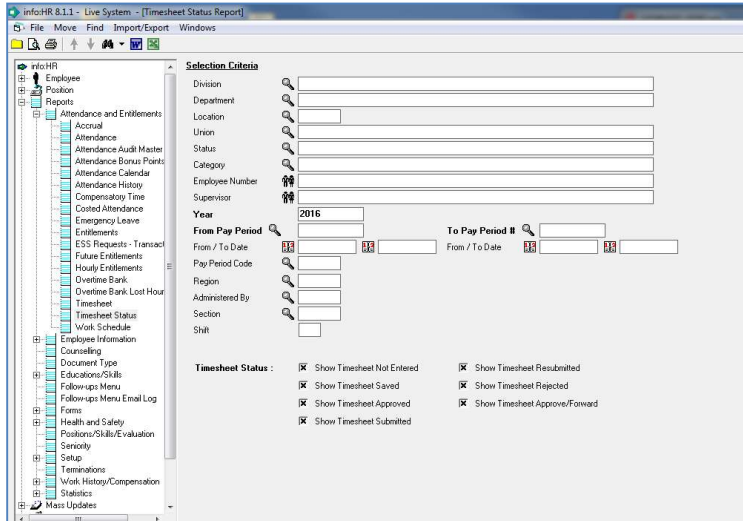
Employee: **Abel, Alex** Status: SUBMITTED

Attendance Reason	Monday 12/28/2016	Tuesday 12/29/2016	Wednesday 12/30/2016	Thursday 01/01/2017	Friday 01/06/2017	Saturday 01/07/2017	Sunday 01/08/2017	Monday 01/09/2017	Tuesday 01/10/2017	Wednesday 01/11/2017	Thursday 01/12/2017	Friday 01/13/2017	Saturday 01/14/2017	Sunday 01/15/2017	Total
Regular	10	10	10	10					10	10	10	10	10		90.00
<b>Total Hours</b>	10.00	10.00	10.00	10.00					10.00	10.00	10.00	10.00	10.00		90.00

## Timesheet Status

The purpose of this report is to view the status of Timesheets in the system. Depending on the selection criteria, the user will be able to view all Timesheets statuses or only the statuses selected. Your organization must have the Timesheets Module to produce this report.

### Screen Layout



- A **From** and **To** pay period must be entered. The lookup can be used to select pay periods.
- By default all Timesheet Statuses are checked. To view specific statuses ensure only those are checked.
  - Example: If you would like to see all Timesheet Statuses except Approved uncheck Show Timesheet Approved. The report will not display the Approved Timesheets.

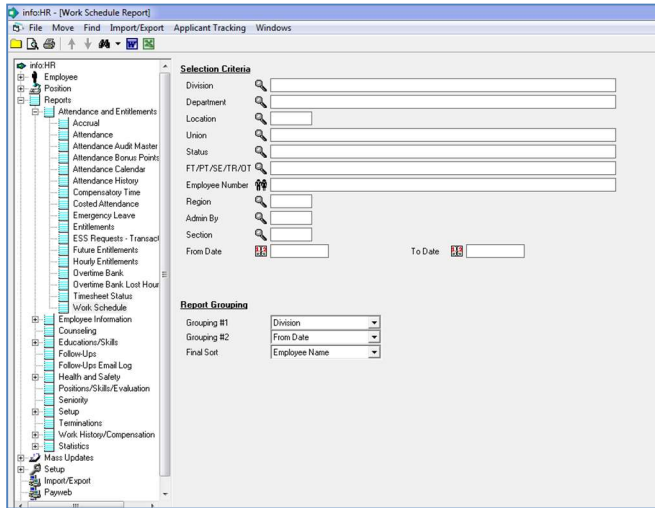
### Sample Report – All Status Timesheet Status Report

Time: 14:58:16		Timesheet Status Report						
Employee Number / Name	2012/1	2012/2	2012/3	2012/4	2012/5	2012/6	2012/7	
221026 Abbott, John	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
1051 Adams, Karen	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
1014 Anderson, Dane	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
1050 Armstrong, Bob	Not entered	Resubmitted	Approved	Saved	Approved	Saved	Saved	
1013 Brown, Thomas	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
2210 Drac, Jeri	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
5000 Haile, Jenny	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
5001 Haile, William	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
1054 Harper, Betsy	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
1012 King, Deborah	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
1052 Mansfield, Katherine	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
1053 Mansglobe, Jayne	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
10231 Sampson, Harry	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
5984 Sartre, Mary-Ellen	Leave of absence	Leave of absence	Leave of absence	Leave of absence	Leave of absence	Leave of absence	Leave of absence	
1027 Saunders, Carey	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	
Total Number of Employees : 15								

## Work Schedule

The purpose of this report is to view the details of work schedules for all employees who have a work schedule created in the system. Work Schedule must be set up to produce this report.

### Screen Layout



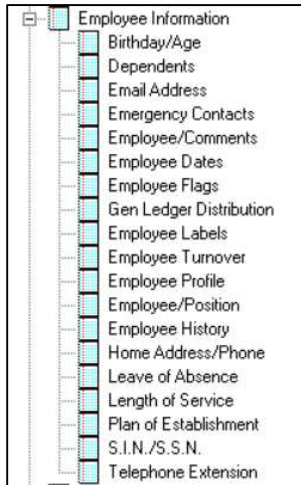
- A **From** and **To** date can be entered to display work schedules within a specific date range.

### Sample Report

Time: 1:14:38 PM		Work Schedule Report										RZScheduler1
Employee Number/Name	From Date	To Date	Week #	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Comments	
3001 Abel, Alex	10/05/16	10/06/17	1	5.00	8.00	5.00	5.00	5.00	5.00	5.00		
			2	5.00	5.00	5.00	5.00	5.00	5.00	5.00		
3001 Abel, Alex	10/16/17	10/21/20	1	0.00	8.00	8.00	8.00	8.00	8.00	0.00		
			2	0.00	8.00	8.00	8.00	8.00	8.00	0.00		
1013 Brown, Thomas	12/19/11		1	0.00	5.00	0.00	10.00	0.00	6.00	0.00		
			2									
			3									
			4									
1013 Brown, Thomas	8/31/16	8/30/20	1	0.00	7.50	8.00	8.00	8.00	7.00	0.00		
			2	0.00	7.50	8.00	8.00	8.00	0.00	0.00		
2215 JONES, JENNIFER	1/01/15	12/31/15	1	0.00	10.00	10.00	10.00	10.00	0.00	0.00		
1053 Manglobe, Jayne	1/01/11		1	0.00	12.00	0.00	12.00	0.00	11.00	0.00		
			2									
			3									
			4									
Total Employees:			4									

## Employee Information

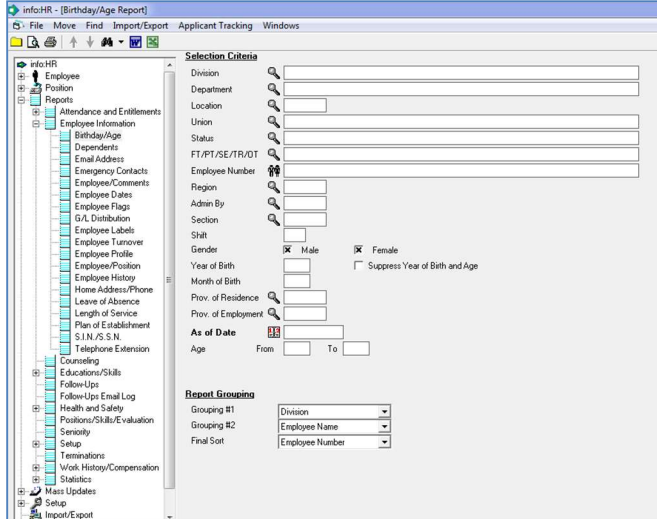
This section of the reports menu is designed to produce reports based on information stored in the Employee Basic Information section of info:HR. Below are the reports included in this section:



## Birthday/Age

The purpose of this report is to provide the user with birthdays of employees by month, year or age.

## Screen Layout



- This report can be run specifically for male or female by selecting the **Gender** box.
- This report can be run for a specific **Year** or **Month** of birth.
- **Suppress Year of Birth and Age** will only display the month and day of the birth date.
- To run the report asking for a specific age range, enter the **Age From** and **To**.

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## Sample Report – Birthday Report Showing Age

Time:3:18:35 PM		Alphabetical Birthday/Age Report by Name				RZAGENM	
As of Date is 04/09/2013							
Employee Number/Name	Date of Birth	Age	Division	Team	Union	Location	
221026	Abbott, John	20/10/1941	71.92	6000	FINADMN	NON	MISS
1051	Adams, Karen	25/09/1954	58.92	2000	ACCT	CUPE	
1014	Anderson, Dane	18/07/1956	57.17	6000	FINADMN	CAW	
1050	Armstrong, Bob	01/01/1952	61.67	1001	FINADMN	NON	2C
1013	Brown, Thomas	15/03/1942	71.50	1001	SALE	NON	
2210	Drac, Jeri	15/02/1983	50.58	ABC	SALE	NON	SW O
5000	Halle, Jenny	01/02/1983	50.58	3000	ADMN	CUPE	
5001	Halle, William	11/05/1932	81.33	1001	ACCT	CUPE	
1054	Harper, Betsy	15/05/1983	50.33	ABC	HR	SW	
1012	King, Deborah	01/08/1960	53.25	1001	SALE	NON	
1052	Mansfield, Katherine	10/04/1989	44.42	ABC	HR	NON	
1053	Mansglebe, Jayne	26/04/1985	48.42	ABC	HR	NON	
10231	Sampson, Harry	05/03/1987	46.50	2000	SALE	CUPE	
5984	Sartre, Mary-Ellen	26/04/1989	44.42	6000	SALE	NON	MISS
1027	Saunders, Carey	10/04/1970	43.42	2000	SALE	ASSN	
		<b>Average Age</b>	<b>55.63</b>				
		<b>Total Number of Employees</b>	<b>15</b>				

## Sample Report – Birthday Report Suppressing Age

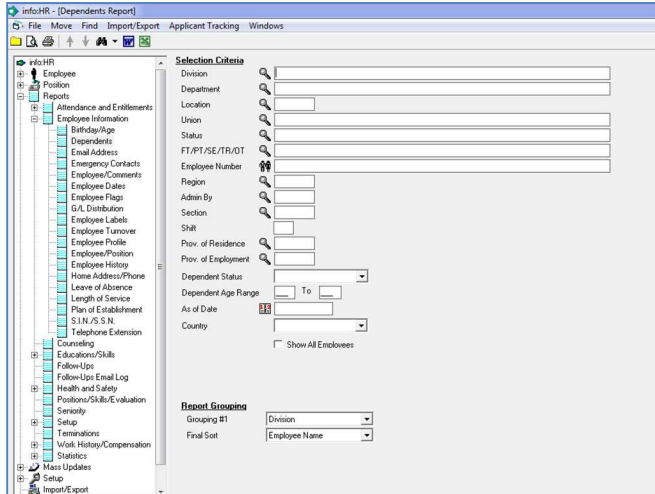
Time:2:11:35 PM		Alphabetical Birthday/Age Report by Name				RZAGENM	
Employee Number/Name	Date of Birth	Division	Department	Union	Location		
11026	Abbott, John	Oct 20	LA	2000	NON	BH	
3011	Abel, Samantha	Jul 09	CAN	1000	NON	TOR	
1051	Adams, Karen	Sep 25	2000	SALE	NON	OLAS	
78631	Adams on, Jennifer	Feb 11	2000	ACCT	NON		
1050	Armstrong-Smith, Grant	Jan 01	2000	ACCT	ASSN	W LA	
1013	Brown, Thomas	Mar 15	2000	ACCT	NON		
2028	Browning, Janice	Nov 01	1000	ACCT	NON		
5545	Darksey, Pat	Sep 15	PWN	SALE	NON	BH	
1025	Davis, Cella	May 12	2000	2000	NON		
1885	Gillies, Catherine	May 10	2000	1000			
5001	Halle, William	May 11	1000	ACCT	NON		
1012	King, Debra	Jun 01	1000	2000	NON		
1231	Sampson, Harry	Mar 05	2000	SALE	NON		
1021	Selby, Murray	Feb 12	2000	ACCT	NON		
5505	Smith, Jane	Jan 01		ACCT			
8524	Wessler, Johnaton	Sep 05	LA	2000		BH	
		<b>Total Number of Employees</b>	<b>16</b>				



## Dependents

The purpose of this report is to display all dependents for each employee. To produce this report Dependents must be entered for employees.

### Screen Layout



- **Dependent Status** allows the user to select a specific status; if left blank, all dependent statuses will display.
- **Dependent Age Range** allows the user to specify a specific age range.
- **Show All Employees** will print a list of all employees within the selection criteria regardless whether they have dependents or not.

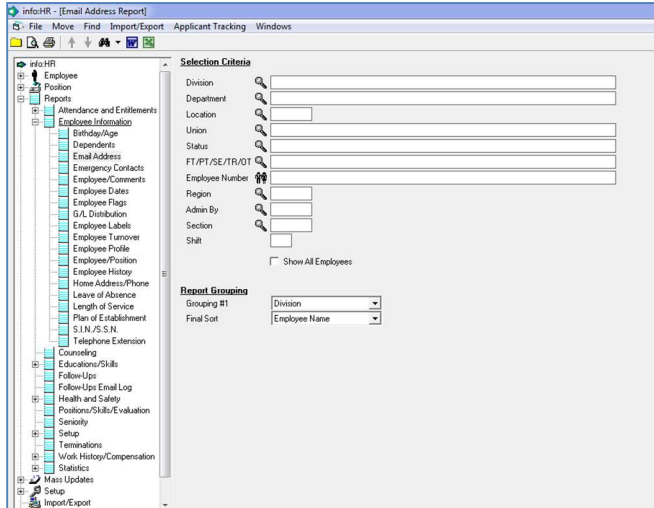
### Sample Report

Time: 2:12:41 PM		Dependents Master Report				RZDEP1	
Employee's Name	Dependent's Name	Gender	Date of Birth	Age	Relationship	Smoker/Status	
Abbott, John	Abbott, Joe	M	2/22/98	16.46		No Other	
Adams, Karen	SMITH, AGNES	F	11/23/27	86.76	Mother	No	
Armstrong-Smith, Grant	ARMS TRONG, COSMO	M	4/10/96	18.33	Son	No Other	
Davis, Celia	DAVE, MILES	M	7/12/35	79.12	Uncle	No	
Sampson, Harry	Sampson, Donald	M	3/20/62	52.41	Spouse	No	

## Email Address

The purpose of this report is to list the email address captured on the Status and Dates screen for each employee.

### Screen Layout



- **Show All Employees** will print a list of all employees within the selection criteria regardless whether they have an email address entered or not.

### Sample Report – Email List Showing Only Employees with Email Addresses

Time: 2:15:27 PM		Email Address Report		RZEMAIL1
Department	Employee Number	Name	Email Address	
Cal Regional Office	11026	Abbott, John	jerryr@infohr.net	
Human Resources	3011	Abel, Samantha	barbarac@infohr.com	
Sales	1051	Adams, Karen	kadams@efer.uk	
Finance	1050	Armstrong-Smith, Grant	tojerryr@gmail.com	
Finance	1013	Brown, Thomas	tbrown@abc.ca	
Finance	2028	Browning, Janice	jbrowning@egsa.ca	
Sales	5545	Darksey, Pat	pdarksey@afdfa.ca	
Cal Regional Office	1025	Davis, Celia	cdavis@adfa.ca	
Finance	5001	Haile, William	whaile@fadfa.com	
Finance	5505	Smith, Jane	jsmith1@myoffice.com	
Cal Regional Office	8524	Wesslier, Johnaton	sadfas@ddfas1.com	
<b>Total Employees</b>			<b>11</b>	

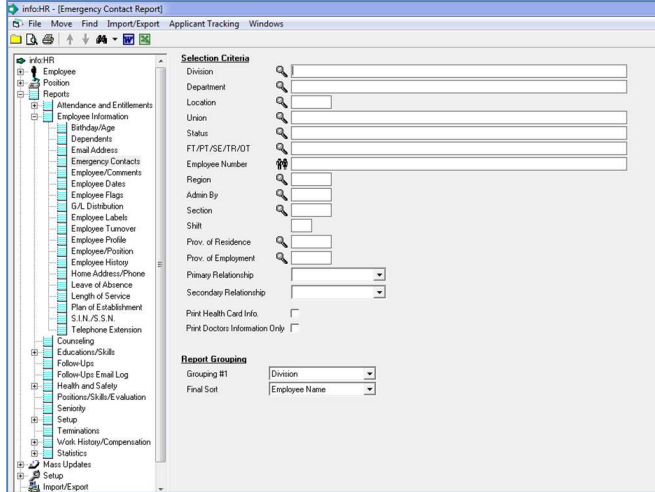
### Sample Report – Email List Showing All Employees

Time: 2:14:25 PM		Email Address Report		RZEMAIL1
Department	Employee Number	Name	Email Address	
Cal Regional Office	11026	Abbott, John	jerryr@infohr.net	
Human Resources	3011	Abel, Samantha	barbarac@infohr.com	
Sales	1051	Adams, Karen	kadams@efer.uk	
Finance	78631	Adams, Jennifer		
Finance	1050	Armstrong-Smith, Grant	tojerryr@gmail.com	
Finance	1013	Brown, Thomas	tbrown@abc.ca	
Finance	2028	Browning, Janice	jbrowning@egsa.ca	
Sales	5545	Darksey, Pat	pdarksey@afdfa.ca	
Cal Regional Office	1025	Davis, Celia	cdavis@adfa.ca	
Human Resources	1865	Gillies, Catherine		
Finance	5001	Haile, William	whaile@fadfa.com	
Cal Regional Office	1012	Kinn, Debra		
Sales	1231	Sampson, Harry		
Finance	1021	Selby, Murray		
Finance	5505	Smith, Jane	jsmith1@myoffice.com	
Cal Regional Office	8524	Wesslier, Johnaton	sadfas@ddfas1.com	
<b>Total Employees</b>			<b>16</b>	

## Emergency Contacts

The purpose of this report is to list the emergency contacts for each employee. To produce this report Emergency Contacts must be entered for employees.

### Screen Layout



- **Primary Relationship** – This drop down is used if the user only wants a specific relationship of the primary contact to be displayed. For example, only show those employees that have their mother as their primary contact.
- **Secondary Relationship** - This drop down is used if the user only wants a specific relationship of the secondary contact to be displayed. For example, only show those employees that have their aunt as their secondary contact.
- **Print Health Card Info.** – If this box is checked, health card info will also appear on the report.
- **Print Doctors Information Only** – If this box is checked, the report will only display doctors contact info, not primary or secondary contact details.

### Sample Report

Employee Name	Emergency Contact/Doctor Information	Relationship
Abbott, John	JANE ABBOTT/JOHN ABBOTT Telephone: (515) 225-26612 Telephone #2: (416) 123-45672 Email:	Parents
	PAT Email:	Aunt
		(Doctor) (Doctor)
Adams, Karen	JOHN DOE Telephone: (613) 458-7888 Email: franks3@infohr.net	FATHER
Anderson, Dane	GEORGE ANDERSON Telephone: (519) 555-1212	FATHER
Armstrong, Bob	LEANNA ARMS TRONG Telephone: (416) 555-12121323	Spouse
	JOAN SMITH Telephone: (416) 599-4747	Sister
Brown, Thomas	MARY BROWN Telephone: (519) 555-1212	SPOUSE
Drac, Jeri	JOHN ANDREWS Telephone: (416) 872-2511	SPOUSE
Haile, Jenny	No emergency contacts on file	
Haile, William	No emergency contacts on file	
Harper, Betsy	GERRY, HARPER Telephone: (416) 555-1212 Telephone #2: (416) 555-1111 Email:	buddy

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## Sample Report – Print Health Card Info.

Time: 1:23:10 PM	Emergency Contact Report			RZEMGHT1
Employee Name	Health Card Info.	Emergency Contact/Doctor Information		Relationship
Abbott, John	Health Card #: 1233 Version #: 123 Expiry Date: 1/01/80	JANE ABBOTT/JOHN ABBOTT	Telephone: (515) 225-266612 Telephone #2: (416) 123-45672  Email:  Email:	Parents   Email  (Doctor) (Doctor)
Abel, Alex	Health Card #: 4521-8547-1586 Expiry Date: 8/23/18	Gary Abel	Telephone: (999) 999-9999999999	Father
Anderson, Dane	Health Card #: 3218-5325-8966 Expiry Date: 1/05/20	Dr. V Bell GEORGE ANDERSON	Telephone: (416) 497-3636 Telephone: (519) 555-1212	(Doctor) FATHER
Armstrong, Bob	Health Card #: 987654 Version #: PK Expiry Date: 1/01/09	Dr. Liang LEANNA ARMSTRONG	Telephone: (519) 524-5548 Telephone: (416) 555-12121323	(Doctor) Spouse

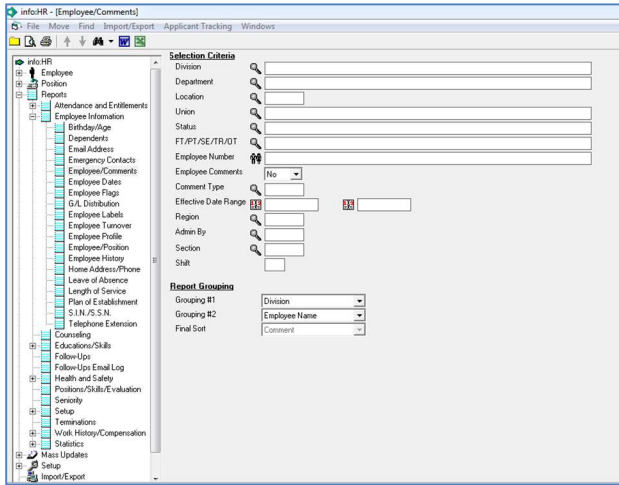
## Sample Report – Print Doctors Information Only

Time: 1:24:21 PM	Emergency Contact Report - Doctors Information Only			RZEMERG1D
Employee Name	Doctor Information	Address 1: Address 2:		Doctor Ty
Abbott, John				Primary Do
				Secondary Do
Abel, Alex	Dr. V Bell	Address 1: 5 Scotland Road Telephone: (416) 497-3636		Primary Do
Anderson, Dane	Dr. Liang	Address 1: Telephone: (519) 524-5548		Primary Do
Armstrong, Bob		Address 1:		

## Employee/Comments

This report is a one page “fact-sheet” for the employee’s file. The report details:

- Basic Employee Information
- Employment Information
- Entitlement Information
- Banking Data
- Emergency Contact Data
- Comments



- To view **Employee Comments** on the report select **Yes** from the drop down. If you would like to view only the comments select **Only**.
- **Effective Date Range** refers to comments. If a date range is entered, Comments falling within the date range will be printed.

### Sample Report - No Employee Comments (Page 1)

Time: 2:21:39 PM		Detailed Employee Master Report		RZMASTRN	
<b>Basic Employee Information</b>					
Employee:	Smith, Jane	Employee #:	5505		
Status:	LTD	LTD			
FT/PT/SE/TR/OT:	FT	Employee Type:	0		
Department:	ACCT	Finance	Section:		
Division:			Location:		
Badge ID:	5506				
Middle Name:					
Alias:					
G/L #:	1011	Outside Sales	Telephone #:	(519) -	
Address:	123 Any St.				
	London, ON N6J 3C1	Alternate Phone #:			
Email Address:	jsmith1@myoffice.com	Cellular Telephone:			
Social Insurance Number:	441-547-601	Pager Number:			
Social Security Number:		Date of Birth:	1/01/90	Age:	24.61
		Gender:	F	Marital Status:	S
<b>Employment Information</b>					
Union:					
Internal Ext.:					
<b>Employment/Pension Dates</b>					
Original Hire Date:	1/01/91	23.61	Years	First Day:	
Seniority Date:	1/01/91	23.61	Years	Last Day:	
Last Hire Date:					
Union Date:					
Experience Year:					
OMERS:					
Department Start Date:					
Division Start Date:					
<b>Vacation &amp; Sick Entitlement Information (in hours)</b>					
Vacation Time	Previous Year:	0.00	Sick Time	Previous Year:	92.00
	Current Year:	240.00		Current Year:	12.00
	Taken:	0.00		Taken:	0.00
	Outstanding:	240.00		Outstanding:	104.00

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## Sample Report – With Comments (Page 1 same as above, Page 2)

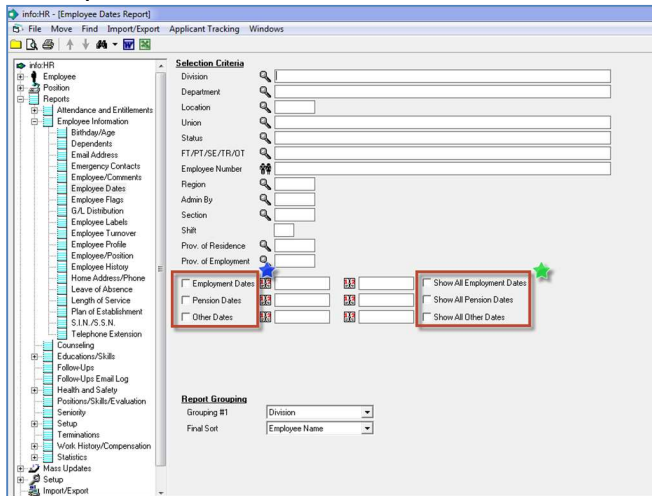
Time: 2:22:33 PM		Detailed Employee Master Report		RZMASTER	
<b>Emergency Contact Data</b>					
<b>Primary Contact</b>			<b>Secondary Contact</b>		
Name:	LEANNA ARMS TRONG	Name:	DR. JON SMITH		
Relationship:	Spouse	Relationship:	FAMILY DR.		
Telephone:	(306) 555-1212	Telephone:	(306) 599-4747		
Telephone #2:		Telephone #2:			
Cellular Phone:		Cellular Phone:			
Pager Number:		Pager Number:			
E mail Address:		E mail Address:			
<b>Primary Doctor</b>			<b>Secondary Doctor</b>		
Doctor Name:		Doctor Name:			
Telephone:		Telephone:			
Address 1:		Address 1:			
Address 2:		Address 2:			
Comment Type:	AMEX Credit Card	Date:	6/01/02		
Grant has a company American Express credit card. No. 123-454-0001 Exp date 06/2004					
Comment Type:	Keys to LA Office	Date:	1/01/01		
Grant has a complete set of keys to the LA office					

## Sample Report – Comments Only



Time: 2:23:49 PM		Comments Master Report		RZMASTR1	
Division	Central Branch				
Employee:	Davis , Celia	Employee#:	1025		
Comment Type:	Publication in Trade Journal	Date:	1/15/00		
Article published in the California HR Management Journal					
Employee:	Armstrong-Smith , Grant	Employee#:	1050		
Comment Type:	AMEX Credit Card	Date:	6/01/02		
Grant has a company American Express credit card. No. 123-454-0001 Exp date 06/2004					
Comment Type:	Keys to LA Office	Date:	1/01/01		
Grant has a complete set of keys to the LA office					
Employee:	Brown , Thomas	Employee#:	1013		
Comment Type:	Keys to LA Office	Date:	1/01/00		
To be given when promoted in the new year					
Employee:	Adams , Karen	Employee#:	1051		
Comment Type:	Inventions	Date:	12/01/99		
A non-painful mosquito smacking device. Patent pending					

## Employee Dates

This report is used to view dates stored on the Status/Dates screen for selected employees.



This is an Excel-based report that shows all employment dates for the selected criteria.

-  This area selects what type of "Dates" should appear on the report. One or more options can be selected.
-  If these boxes are checked, the Excel report will print ALL dates associated with the category of dates requested above regardless of whether or not there is any data entered into those date fields. For most situations, these boxes would not be checked.

### Sample Report – Employment Dates

HR Systems Strategies											
Employee Dates Report											
Date: Jul 30, 2014											
Time: 08:37:41											
Group by (none)											
Employee #	Name	Position	Original Hire	Seniority	Last Hire	Union Date	Employment Dates	First Day	Last Day	OMERS	User Defined
3011	Abel, Samantha	HR Generalist	6/01/10		6/01/10						
78631	Adams, Jennifer	Receptionist	10/16/13		10/16/13						2/15/14
1050	Armstrong-Smith, Grant	Chief Information Officer	10/02/94		10/02/94						10/02/94
1913	Brown, Thomas	Director, Human Resources	6/30/88		6/30/88	1/31/14					1/07/14
2028	Browning, Janice	HR Clerk	5/01/90		5/01/90						5/01/90
5545	Danahay, Pat	Sales Manager	7/30/11		7/30/11			7/30/11			7/30/11
1025	Davis, Coia	HR Clerk	5/01/08		5/01/08						
1865	Giles, Catherine	Director, Human Resources	5/30/14								
5001	Hale, William	Receptionist	5/22/93		5/22/93						5/01/99
1012	King, Debra	Benefits & Pension Admin	12/01/10		12/01/10						12/01/10
1231	Sampson, Harry	Receptionist	12/01/90		12/01/90						1/15/91
1021	Selby, Murray	AR Clerk	1/01/95		1/01/95						4/03/01
5505	Smith, Jane	Developer	1/01/91		1/01/91						
8524	Wessler, Johnaton	Programmer	5/30/11								

### Sample Report – Pension Dates

HR Systems Strategies													
Employee Dates Report													
Date: Jul 30, 2014													
Time: 08:39:20													
Group by (none)													
Employee #	Name	Position	Eligibility	Earliest Retirement	Normal Retirement	Latest Retirement	Pension Dates	Pension Date 1	Pension Date 2	Pension Date 3	Pension Date 4	Pension Date 5	Pension Date 6
11020	Abbott, John	Chief Information Officer	4/01/91										
3011	Abel, Samantha	HR Generalist			7/09/96								

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## Sample Report – Other Dates

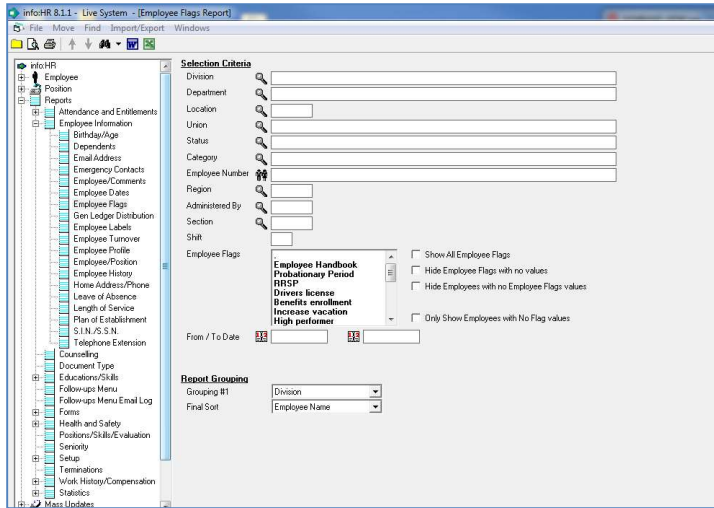
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	<b>HR Systems Strategies</b>												
2	<b>Employee Dates Report</b>												
3	Date: Jul 30, 2014												
4	Time: 08:42:56												
5													
6	Group by (none)												
7													
8	Employee #	Name	Position	Other Date 1	Other Date 2	Other Date 3	Other Date 4	Other Dates					
9	11026	Abbott, John	Chief Information Officer					Other Date 5	Other Date 6	Other Date 7	Other Date 8	Other Date 9	Other Date 10
10	3011	Abel, Samantha	HR Generalist										
11	1951	Adams, Karen	Benefits & Pension Admin										
12	78831	Adams, Jennifer	Receptionist										
13	1050	Armstrong-Smith, Grant	Chief Information Officer										
14	1013	Brown, Thomas	Director, Human Resources										
15	2026	Browning, Janice	HR Clerk										
16	5545	DeNary, Pat	Sales Manager										
17	1025	DeWitt, Celia	HR Clerk										
18	1065	Gilles, Catherine	Director, Human Resources										
19	5001	Hask, William	Receptionist										
20	1012	King, Debra	Benefits & Pension Admin										
21	1231	Sampson, Harry	Receptionist										
22	1021	Tatby, Sherry	Jr. Clerk										
23	5505	Smith, Jane	Developer										
24	8524	Wessler, Johnston	Programmer										
25													



## Employee Flags

The purpose of this report is to list the details of each employee flag.

### Screen Layout



- The default setting for this report is to show the details for all flags.
- If the user only wishes to view some flags, but not all, select the desired flags in the **Employee Flag** drop down using the Ctrl key.

### Check Boxes

- **“Show All Employee Flags”** will print all employee flags setup for the group of employees selected. Some employees within the group may not have flag values but they will still show on the report.
- **“Hide Employee Flags with no values”** only flags that have values assigned will print.

### Sample Report – All Employee Flags

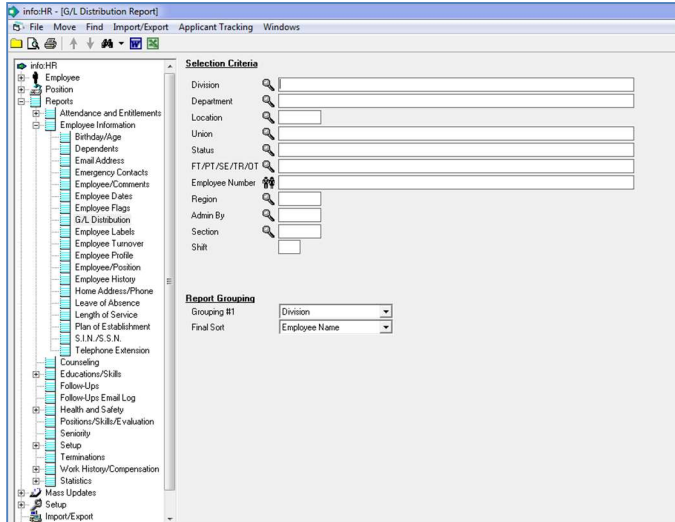
Employee # / Name	Flag	Flag Value	Date	Follow-up	Reason
1014 Anderson, Dane	Police Check				
	Employee Handbook				
	Probationary Period				
	RRSP				
	Drivers license				
	Benefits enrollment				
	Increase vacation				
	High performer				
	Pension % adjustment				
	Pension enrollment				
	Seasonal/casual				
	Conflict of interest form				
	Step Increase				
1050 Armstrong, Bob	Police Check	yes	30/03/2012	30/03/2017	Police Check Renewal
	Employee Handbook	#3456	20/03/2003		
	Probationary Period	3 months		16/05/2012	Probationary period ending
	RRSP		15/08/2006		
	Drivers license	G2567-98765-12345		27/06/2016	Drivers license renewal
	Benefits enrollment	yes			
	Increase vacation				
	High performer	yes	16/01/2008		
	Pension % adjustment			07/04/2010	Pension % increase
	Pension enrollment			02/01/2004	Pension enrollment
	Seasonal/casual				
	Conflict of interest form		07/02/2012	31/01/2012	Conflict of interest form
	Step Increase			12/03/2014	Step increase

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## General Ledger Distribution

The purpose of this report is to list those employees that have their salary assigned to various G/L accounts.

### Screen Layout



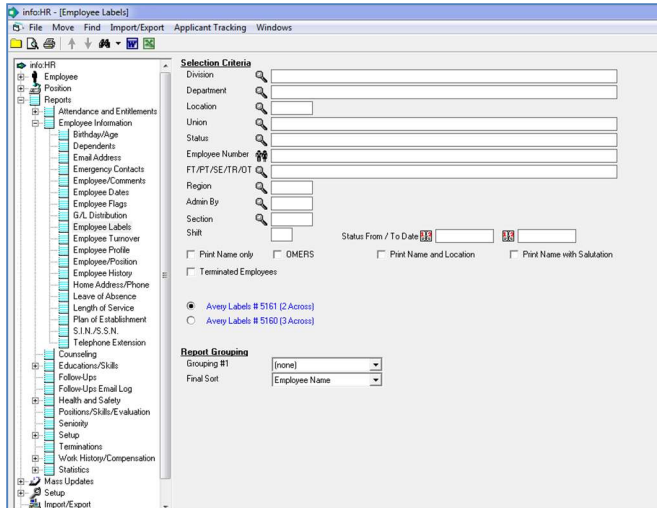
### Sample Report

Employee Information		Position	G/L#	
11026	Abbott, John	Chief Information Officer		Test
	<b>G/L#</b>	<b>Effective Date</b>	<b>%</b>	<b>Comments</b>
	1234-56789	1/01/11	50.00	
	5283-8862	1/01/11	40.00	
	456-9853	1/01/11	10.00	
2435	Abel, Samantha	Health & Safety Coordinator		Comments
	<b>G/L#</b>	<b>Effective Date</b>	<b>%</b>	
	1300	4/01/13	50.00	
	1515	4/01/13	50.00	
1051	Adams, Karen	Benefits & Pension Admin		Outside Sales
7883	Adams, Jennifer	Receptionist		Outside Sales
1050	Armstrong-Smith, Grant	Chief Information Officer		Outside Sales
1013	Brown, Thomas	Director, Human Resources		Outside Sales
5545	Darksey, Pat	Sales Manager		Foreign Service
1025	Davis, Celia	HR Clerk		Test
5000	Haile, Jenny	Programmer		Agency
5001	Haile, William	Receptionist		Agency
1012	King, Debra	Benefits & Pension Admin		Test
1052	O'Brian, RONALD	MIS Director		
1231	Sampson, Harry	Receptionist		Outside Sales
1021	Selby, Murray	AR Clerk		Outside Sales
5506	Smith, Jane	Developer		Outside Sales
8524	Wessler, Johnaton	Programmer		Foreign Service
<b>Grand Total for Company:</b>			<b>19</b>	

## Employee Labels

The purpose of this report is to automate the printing process of Avery labels.

### Screen Layout



**Note:** Labels meet Canada Post guidelines dated March 8, 2012.

- **Print Name only** – will only print the employee’s name on the label.
- **Pension Date** – will print the name and address of employees that have a pension date which is entered on their status and dates screen.
- **Print Name and Location** – will only print the employee’s name and their location which is specified on their demographics screen.
- **Print Name with Salutation** – will print the employee’s name and address, and also includes their salutation.
- **Terminated Employees** – will print a name and address of all employees who are terminated.
- The option for two types of **Avery Labels** is available; select the appropriate one.

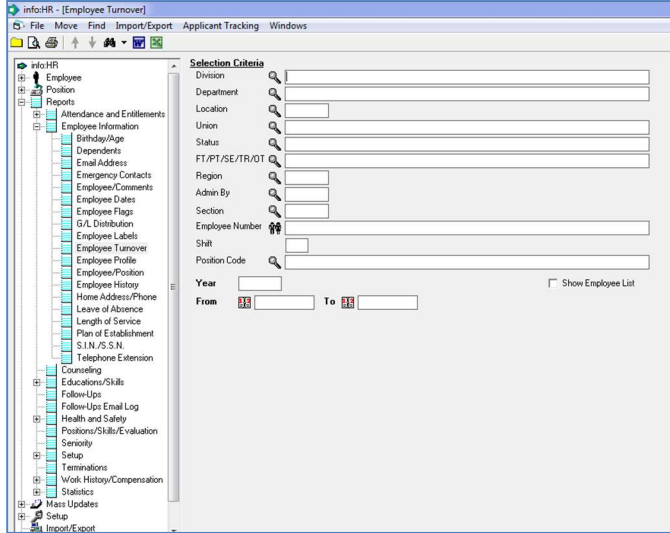
### Sample Report – Address Labels Using Avery#5161

<b>John Abbott</b> 125 MIL TOWN AVE. SCARBOROUGH ON M4T 1S2	<b>Alex Abel</b> 125 Main S T Fergus ON N1M 3V3
<b>Dane Anderson</b> 105 Rowena Drive APT 412 LONDON ON N4N 4N4	<b>Bob Armstrong</b> 250 Main Street South Suite 400 TORONTO ON M5B 3C3
<b>Thomas Brown</b> 219-785 HOPEWELL CRES. Apt 123 LONDON ON N4N 4N4	<b>Janice Browning</b> 355 GLEBE AVE. APT 201 TORONTO ON M4T 1S2
<b>Jenny Haile</b> 554 CHURCH S T. SCARBORO ON M4R 2E1	<b>William Haile</b> 554 CHURCH S T. ST THOMAS ON N3K 3L2

## Employee Turnover

The purpose of this report is to give the user a detailed list of new hires, terminations, and a turnover ratio for a selected year or date range.

### Screen Layout



- The user must enter the **Year** for which they want the turnover details.
- A **From** and **To** date must be entered. This could be for the full year, or part thereof.
- The default setting of this report is to display the details sorted by division and then department; no employee names are included.
- **Show Employee List** will display the names associated with the terminations.

### Sample Report - Employee Turn Over

Time: 12:43:30 PM		Employee Turnover Report					rzemptn	
Year: 2011 (01/01/11 - 12/31/11)		Total # of Male / Female		Total # of Active/Terminated Employees	Number of Active Employee	Number of New Hires	Number of Terminations	Turnover Ratio
Division	Department							
	ADMINISTRATION	1 / 0		1	1	0	0	0.00 %
	FINANCE & ADMIN	1 / 0		1	0	0	1	100.00 %
	<b>Total of:</b>	<b>2 / 0</b>		<b>2</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>50.00 %</b>
ABC DIVISION	ADMINISTRATION	0 / 1		1	1	0	0	0.00 %
ABC DIVISION	HUMAN RESOURCES	0 / 3		3	3	0	0	0.00 %
ABC DIVISION	SALES DEPARTMENT	0 / 1		1	1	0	0	0.00 %
	<b>Total of ABC DIVISION:</b>	<b>0 / 5</b>		<b>5</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>0.00 %</b>
Division #1001	ACCOUNTING	1 / 0		1	1	0	0	0.00 %
Division #1001	FINANCE & ADMIN	2 / 0		2	2	0	0	0.00 %
Division #1001	SALES DEPARTMENT	1 / 1		2	2	0	0	0.00 %
	<b>Total of Division #1001:</b>	<b>4 / 1</b>		<b>5</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>0.00 %</b>

### Sample Report – Showing Employee List

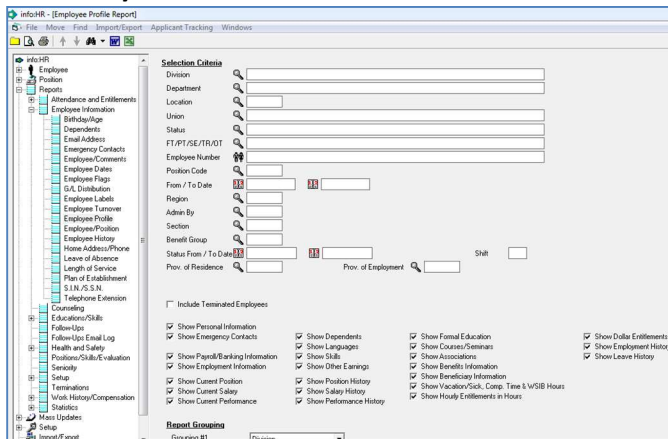
Time: 12:44:39 PM		Employee Turnover Report					rzemptn	
Year: 2011 (01/01/11 - 12/31/11)		Total # of Male / Female		Total # of Active/Terminated Employees	Number of Active Employee	Number of New Hires	Number of Terminations	Turnover Ratio
Division	Department	Employee Nb./Name						
	ADMINISTRATION		1 / 0	1	1	0	0	0.00 %
	FINANCE & ADMIN	221028 Abel, Alex	1 / 0	1	0	0	1	100.00 %
		1021 Selby, Murray						
	<b>Total of:</b>		<b>2 / 0</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>50.00 %</b>
ABC DIVISION	ADMINISTRATION	2210	0 / 1	1	1	0	0	0.00 %
ABC DIVISION	HUMAN RESOURCES	1054 Harper, Betsy	0 / 3	3	3	0	0	0.00 %
		1053 Mansplebe, Jayne						
ABC DIVISION	SALES DEPARTMENT	1052 Mansfield, Katherine	0 / 1	1	1	0	0	0.00 %
		2210 O'Hara, Jeri						
	<b>Total of ABC DIVISION:</b>		<b>0 / 5</b>	<b>5</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>0.00 %</b>

## Employee Profile

The purpose of this report is to summarize the employee data and put it in report format. This report includes information from:


- Employee Demographics
- Status and Dates
- Emergency Contacts
- Banking Information
- Dependents
- Current Position information
- Position/Salary/Performance History
- Languages spoken and written
- Skills
- Other Earnings/Dollar Entitlements
- Formal Education
- Courses/Seminars taken
- Associations
- Benefits/Beneficiary
- Vacation/Sick/Comp Time/Hourly Entitlement information
- Employee History details
- Leave of Absence history

## Screen Layout



- The default setting of this report is to only show active employees; to see terminated employees as well, check **Include Terminated Employees**.
- By default, all items are selected. To hide an employee category of information, uncheck the box associated with the category.

## Sample Report – (Page 1 of 4)

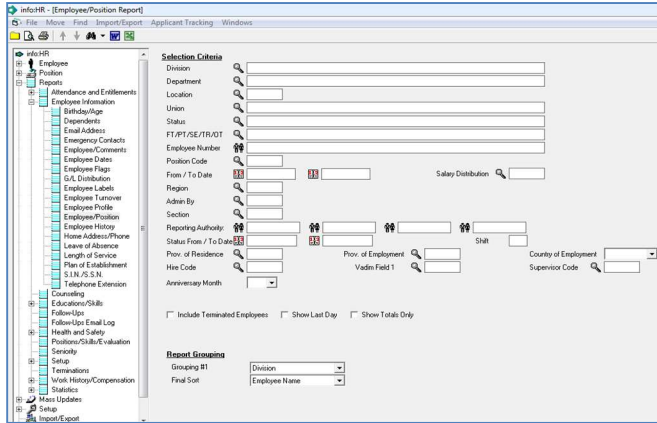
Time: 10:23:41 AM	EMPLOYEE PROFILE	RZPROFIL
NAME OF EMPLOYEE	Abbott, John	Empl #: 11026
		
Division:	West Coast Branch	Payroll ID:
Department:	Cal Regional Office	Employment Status: Active
G/L#:	1234-5689	Category: FT
Location:	Beverly Hills	Union: Non Union
Region:	Northern California	Employee Type: 1 - Full Time Salary
Admin By:	EMPLOYEES ASS'N	Section: One
<b>PERSONAL INFORMATION</b>		
Badge ID:	11026	
Middle Name:		
Alias:		
Internal Extension:	1234	Home Telephone: (416) -
Home Address:	125 Walnut St	Alternate Telephone:
		Cellular Telephone:
	Brentwood, ON L3E 3E4	Pager Number:
	CANADA	Email Address: johna@xyz.com
Social Insurance Number:	452-447-725	Gender: M Marital Status: S Smoker: No
Social Security Number:		BirthDate: 10/20/1951 61.00 Years old
Driver License #:		Type of Vehicle:
Parking Permit #1:		Parking Permit #2:
License Plate #1:		License Plate #2:

- Page samples 2 to 4 are not part of the documentation.

## Employee/Position

The purpose of this report is to give a list of all employees and their current position titles. Using the selection criteria, this report can be used to answer many personnel-related questions.

### Screen Layout



- To get a list of new hires within a specific date range, enter in the **From/To Date** of the desired time frame. This date range uses the employee's "Original Hire Date".
- To get a list of all employees hired within a given month, select the **Anniversary Month** from the drop down. Using the date range will give you a list of employees hired within the date range for that month.
- The default setting on this report is to display active employees only. To see terminated as well, the user must check the box **Include Terminated Employees**.
- **Show Last Day** – will include the Last Day Date that is found on the Status and Dates screen.
- **Show Totals Only** – will display the total number of employees and total FTE # (if entered).

### Sample Report – Employee Position

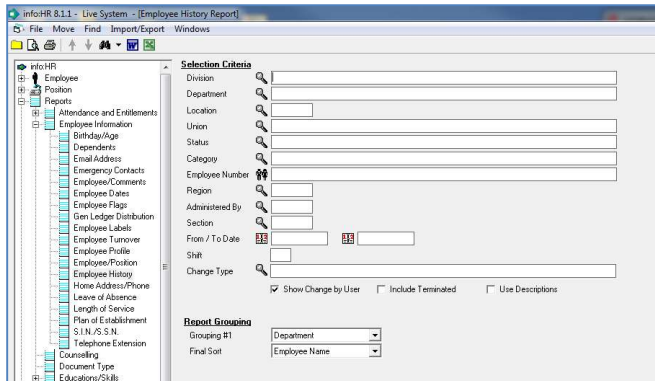
Employee Information		Original Hire Date	Position	Status	Union	Category	FTE #
11026	Abbott, John	3/15/89	Chief Information Officer	A	NON	FT	
2435	Abel, Samantha	6/15/05	Health & Safety Coordinator	A	ASSN	FT	
1051	Adams, Karen	2/01/85	Benefits & Pension Admin	A	NON	FT	
7863	Adams, Jennifer	9/12/12	Receptionist	A	NON	FT	
1050	Armstrong-Smith, Grant	10/02/94	Chief Information Officer	A	ASSN	FT	
1013	Brown, Thomas	6/30/88	Director, Human Resources	A	NON	FT	
5545	Darksey, Pat	7/30/11	Sales Manager	A	NON	FT	
1025	Davis, Celia	5/01/06	HR Clerk	A	NON	FT	1.00
5000	Haile, Jenny	6/01/93	Programmer	A	NON	FT	
5001	Haile, William	5/22/93	Receptionist	A	NON	FT	
1012	King, Debra	12/01/10	Benefits & Pension Admin	A	NON	OT	
1052	O'Brian, RONALD	6/01/91	MIS Director	ACTB		FT	
1231	Sampson, Harry	12/01/90	Receptionist	AWS	NON	FT	
1021	Selby, Murray	1/01/95	AR Clerk	AWS	NON	PT	
5506	Smith, Jane	1/01/91	Developer	A		FT	0.75
8524	Wesslier, Johnaton	5/30/11	Programmer	A		FT	0.20
<b>Grand Total for Company:</b>			<b>16</b>				<b>1.95</b>



## Employee History

The purpose of this report is to capture changes that have been made on screens that do not have a table to track the history. For example, a change in department or division is made directly on the Demographics screen. There is no table to track this history, so the history is kept in the Employee History screen. This report allows you to pull details on specific changes, or changes for the whole organization.

### Screen Layout



- To view specific changes to an employee record, select those changes using the **Change Type** table. Check each box of the corresponding change type to display the details for it. If no change type is selected, all change types will display.
- The **Show Change by User** needs to be checked if you need to know who made the change. Otherwise, the login name of the person who made the change will be suppressed.
- **Include Terminated** merges both active and terminated under one report based on the selection criteria requested. On the report, there is no distinction between active and terminated employees.
- The **Use Description** option shows the English values of the changes and not just the codes.

### Sample Report

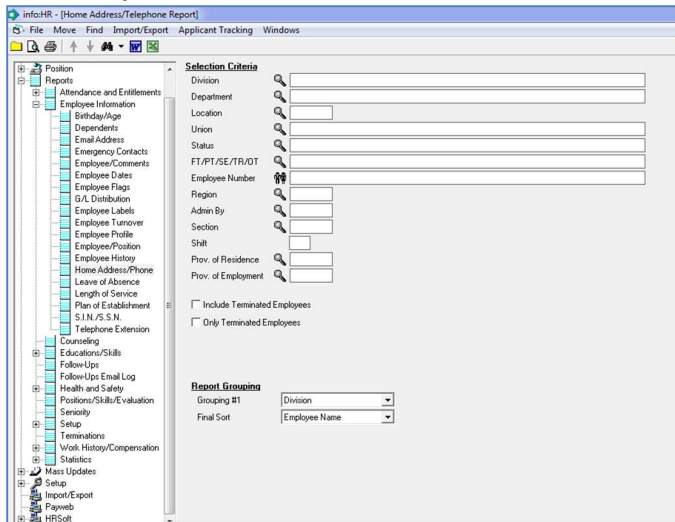
Time: 2:32:48 PM		Employee History		RZEmpHistory1
11/28/96	Union			NON
8/29/96	Division	2000		2000
8/29/96	Division	2000		1000
<b>Employee Number and Name: 78631 Adamson, Jennifer</b>				
<b>Change Date</b>	<b>Change Type</b>	<b>Old Value</b>		<b>New Value</b>
9/12/12	Department			ACCT
9/12/12	Division			2000
9/12/12	Status			A
9/12/12	FT/PT/SE/TR/OT			FT
9/12/12	Benefit Group			MGMT
<b>Employee Number and Name: 1050 Armstrong-Smith, Grant</b>				
<b>Change Date</b>	<b>Change Type</b>	<b>Old Value</b>		<b>New Value</b>
1/22/05	Status	ACTB		A
1/22/05	Benefit Group			MGMT
8/01/02	Union	NON		ASSN
4/29/99	Department	MFG		ACCT
4/27/99	Department	ACCT		MFG
11/05/96	FT/PT/SE/TR/OT	SE		FT
<b>Employee Number and Name: 1013 Brown, Thomas</b>				
<b>Change Date</b>	<b>Change Type</b>	<b>Old Value</b>		<b>New Value</b>
1/07/14	Status	A		TEMP
1/07/14	Status	TEMP		A
11/19/13	Status	MAT		A
2/17/12	FT/PT/SE/TR/OT	F/T		FT
9/15/11	FT/PT/SE/TR/OT	FT		FT
7/18/11	Benefit Group			MGMT
9/15/09	Department	2000		ACCT
9/15/09	Division	1000		2000
1/22/05	Region	SCAL		AR
1/22/05	Status	ACTB		A
1/22/05	Department	SALE		2000
11/28/96	Union			NON



## Home Address/Phone

The purpose of this report is to display the employee's home address and phone number.

### Screen Layout



- The default setting on this report is to display details for active employees only. To include terminated employees in the list, select **Include Terminated Employees**.
- If the user only wants the details of terminated employees and not active, select **Only Terminated Employees**.

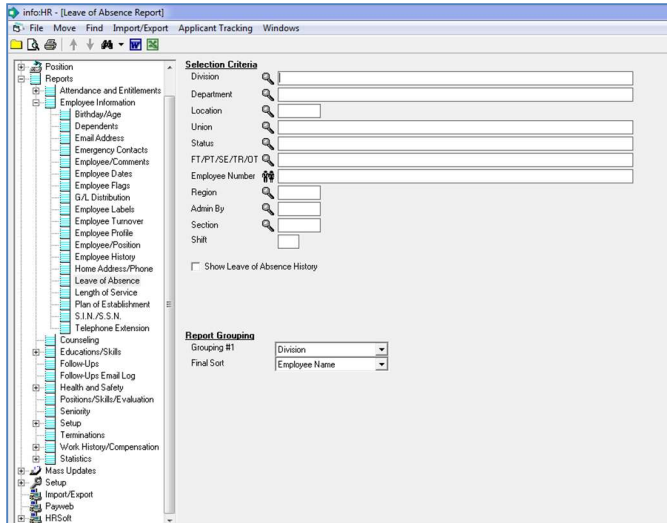
### Sample Report

Employee Number/Nam	Home Address	Phone Numbers
221028 Abbott, John	125 MILTOWN AVE. SCARBOROUGH ON M4T 1S2	Telephone (416) 720-5488 Cellular Telephone (999) 999-9999 Telephone #2 (416) 254-8654 2 Pager Number (123) 456-7890
3001 Abel, Alex	222 McCaul Street Apt# 213 Toronto ON M3C 1B5	Telephone (999) 999-9999 Cellular Telephone Telephone #2
1014 Anderson, Dane	105 Rowena Drive APT 412 LONDON ON N4N 4N4	Telephone (519) 555-1212 Cellular Telephone Telephone #2 (516) 542-4587
1050 Armstrong, Bob	250 Main Street South Suite 400 Vancouver BC V2C 3Y4	Telephone (604) 555-1212 Cellular Telephone Telephone #2 (604) 555-1212

## Leave of Absence

The purpose of this report is to list all employees that are currently on a leave of absence.

### Screen Layout



- The default setting on this report is to only show those employees how are currently on a leave of absence.
- **Show Leave of Absence History** will include all leaves. If this option is selected the user can enter a From and To date to narrow down the search.

### Sample Report – Leave of Absence

Time: 2:34:25 PM		Leave of Absence			RZTLAY1	
Employee Number and Name	Status	From Date	To Date	Length (Weeks)		
3011 Abel, Samantha	LTD	06/01/2014	06/16/2014	2.1		
5505 Smith, Jane	LTD	12/02/2013	05/02/2014	21.5		

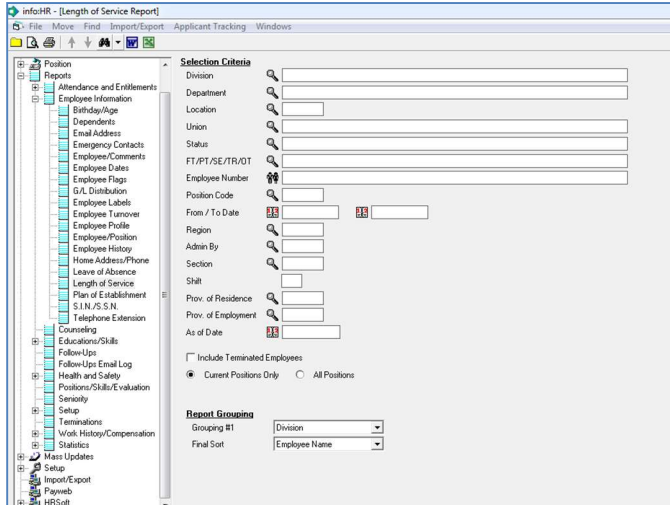
### Sample Report – Show Leave of Absence History

Time: 2:35:33 PM		Leave of Absence History			RZTLOAH1att	
Employee Number and Name	Status	Reason	From Date	To Date	Length (Weeks)	
3011 Abel, Samantha	Leave of Absence	LTD	06/01/2014	06/30/2014	4.1	
3011 Abel, Samantha	Extended Leave of Absence	LTD	06/01/2014	06/16/2014	2.1	
1231 Sampson, Harry	Leave of Absence	Military Leave	01/06/2014	03/31/2014	12.0	
1021 Selby, Murray	Leave of Absence	Military Leave	04/17/2013	07/04/2013	11.1	
1021 Selby, Murray	Extended Leave of Absence	Military Leave	04/17/2013	08/02/2013	16.2	
5505 Smith, Jane	Leave of Absence	LTD	12/02/2013	05/02/2014	21.5	

## Length of Service

This report is used to determine the Length of Service (LoS) for an employee in their positions held during their tenure with the organization.

### Screen Layout



- Columns include: Employee #, Name, Position, Original Date of Hire, Position Start Date, Position End Date, Current and Length of Service.
  - Current will display Yes or No.
  - Length of Service calculation: If there is no Position End Date, the report uses the As of Date as the end date for that position. (Contact info:HR support for a utility that will populate the position end date for all non-current positions.) The report uses the date of termination for terminated employees. Employees terminated are excluded.

### Sample Report – Current Position

Time: 2:36:47 PM		Length of Service Report as of August 05, 2014				RZLOS2	
Number	Name	Position	Original Hire Date	Position Start Date	Position End Date	Current	Length of Service
11028	Abbott, John	Chief Information Officer	3/15/89	2/01/00		Yes	14.52
3011	Abel, Samantha	HR Generalist	6/01/10	6/16/14		Yes	0.14
1051	Adams, Karen	Benefits & Pension Admin	2/01/85	8/01/12		Yes	2.01
78031	Adams on, Jennifer	Receptionist	10/16/13	10/16/13		Yes	0.80
1050	Armstrong-Smith, Grant	Chief Information Officer	10/02/94	4/01/00		Yes	14.35
1013	Brown, Thomas	Director, Human Resources	6/30/88	1/31/14		Yes	0.51
2028	Browning, Janice	HR Clerk	5/01/90	6/01/00		Yes	14.19
5545	Darksey, Pat	Sales Manager	7/30/11	7/31/12		Yes	2.01
1025	Davis, Celia	HR Clerk	5/01/06	5/01/06		Yes	8.27
1885	Gillies, Catherine	Director, Human Resources	5/30/14	5/30/14		Yes	0.18
5001	Halle, William	Receptionist	5/22/93	5/22/93		Yes	21.22
1012	King, Debra	Benefits & Pension Admin	12/01/10	5/18/11		Yes	3.22
1231	Sampson, Harry	Receptionist	12/01/90	4/30/95		Yes	19.28
1021	Selby, Murray	AR Clerk	1/01/95	1/01/97		Yes	17.60
5505	Smith, Jane	Developer	1/01/91	1/01/91		Yes	23.61
8524	Wesslier, Johnaton	Programmer	5/30/11	5/30/11		Yes	3.19
<b>Total Number of Employees : 16</b>							
<b>Average Length of Service : 9.1</b>							

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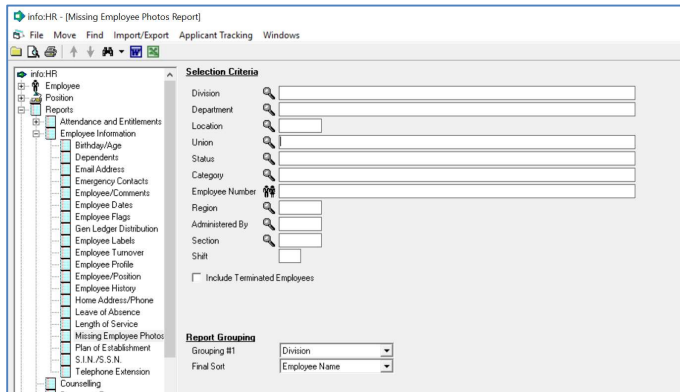
## Sample Report - All Positions

Time: 2:37:45 PM		Length of Service Report as of August 05, 2014			RZLO82		
Number	Name	Position	Original Hire Date	Position Start Date	Current End Date	Length of Service	
11028	Abbott, John	Developer	3/15/89	3/15/89	No	25.41	
11028	Abbott, John	Programmer	3/15/89	9/15/90	No	23.90	
11028	Abbott, John	MIS Director	3/15/89	5/21/95	No	19.22	
11028	Abbott, John	Chief Information Officer	3/15/89	2/01/00	Yes	14.52	
3011	Abel, Samantha	HR Clerk	6/01/10	6/01/10	No	4.18	
3011	Abel, Samantha	HR Generalist	6/01/10	6/16/14	Yes	0.14	
1051	Adams, Karen	HR Clerk	2/01/85	2/01/85	No	29.53	
1051	Adams, Karen	AR Clerk	2/01/85	5/10/87	No	27.26	
1051	Adams, Karen	AR Clerk	2/01/85	12/01/94	No	19.69	
1051	Adams, Karen	Sales Manager	2/01/85	6/01/00	No	14.19	
1051	Adams, Karen	Sales Manager	2/01/85	1/01/03	No	11.60	
1051	Adams, Karen	Benefits & Pension Admin	2/01/85	8/01/12	Yes	2.01	
78631	Adams on, Jennifer	Receptionist	10/16/13	10/16/13	Yes	0.80	
1050	Armstrong-Smith, Grant	Accounting Manager	10/02/94	10/02/94	No	19.85	
1050	Armstrong-Smith, Grant	MIS Director	10/02/94	4/01/00	No	14.35	
1050	Armstrong-Smith, Grant	Chief Information Officer	10/02/94	4/01/00	Yes	14.35	
1013	Brown, Thomas	Benefits & Pension Admin	6/30/88	6/30/88	No	26.12	
1013	Brown, Thomas	Director, Human Resources	6/30/88	8/02/11	No	3.01	
1013	Brown, Thomas	Director, Human Resources	6/30/88	4/22/13	1/30/14	No	0.78
1013	Brown, Thomas	Director, Human Resources	6/30/88	1/31/14	Yes	0.51	

## Missing Employee Photos

This report is used to determine which employees who do not have a photo in info:HR.

### Screen Shot



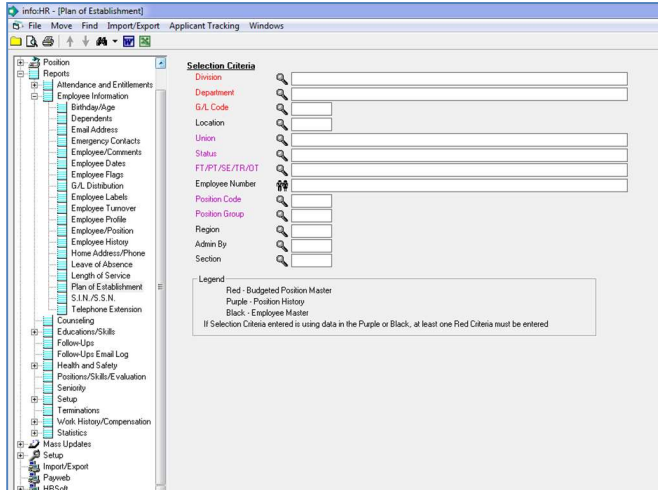
### Sample Report

Employee Nbr/Name	Original Hire Date	Status	Union	Category
<b>ACTIVE EMPLOYEES</b>				
3001 Abel, Alex	10/25/10	PERM	CUPE LOCAL 105	FT
2210 O'Hara, Jeri	1/15/80	PERM	NON-UNION	FT
11011 YOUNG, YOGI	8/01/81	A	CAW LOCAL #101	FT
<b>Number of ACTIVE EMPLOYEES</b>			<b>3</b>	
<b>TERMINATED EMPLOYEE</b>				
221027 Brown, John	7/17/12	CON		FT
<b>Number of TERMINATED EMPLOYEES</b>			<b>1</b>	
<b>Grand Total for Company:</b>			<b>4</b>	

## Plan of Establishment

This report is used by organizations that use the Multi-Position Module. To produce this report, the Budgeted Position screen must be complete.

### Screen Layout



### Sample Report

Time: 8:10:22 PM Plan of Establishment Report REP0E.rpt

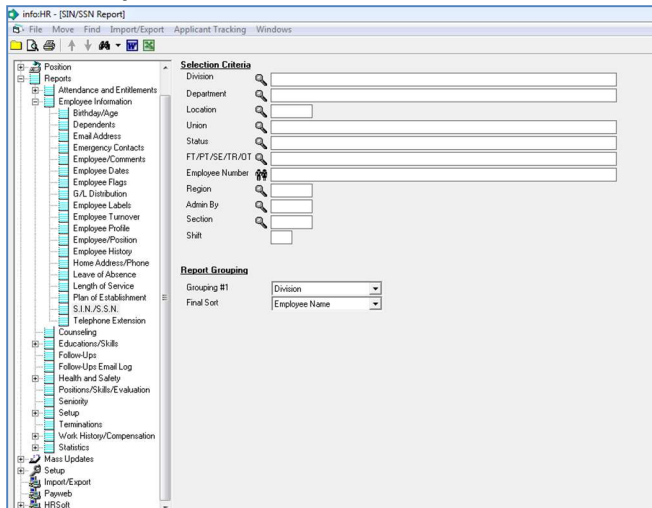
Position Title	Position Control #	FTE	Grade	Salary	Employee Name	Employee Status	Lang Code	Next Salary Review Date	Temp Ann. Date	Employee Date
Division: ABC DIVISION										
Department: HUMAN RESOURCES										
HR CLERK		1.00	SB2	\$31,372	Mansfield, Katherine	Permanent				28/07/2009
HR CLERK		1.00	SB2	\$20,240	Mansplebe, Jayne	Permanent				01/01/1982
Office Administrator		1.00	GB	\$15	Harper, Betsy	Permanent				23/07/1994
Department: SALES DEPARTMENT										
SALES MANAGER		1.00	MGMT	\$43,200	Drac, Jan	Permanent	FR			15/01/1990

# info:HR Reports User Manual

## SIN/SSN

The purpose of this report is to be able to pull a list of social insurance numbers by employee.

### Screen Layout



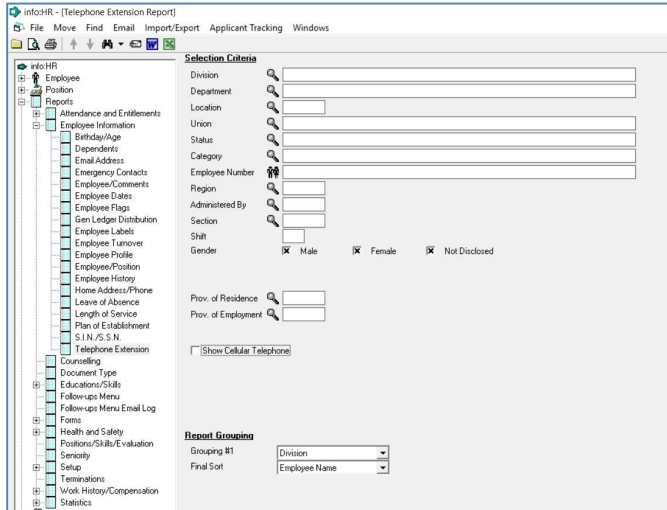
### Sample Report

Time:	S.I.N. / S.S.N. Report		RZSINSSN
8:12:00 PM			
<b>Team</b>	<b>Employee Number/Name</b>	<b>Country</b>	
FINANCE & ADMIN	221026 Abbott, John	CANADA	S.I.N. 999-999-999
ACCOUNTING	1051 Adams, Karen	CANADA	S.I.N. 999-999-999
FINANCE & ADMIN	1014 Anderson, Dane	CANADA	S.I.N. 999-999-999
FINANCE & ADMIN	1050 Armstrong, Bob	CANADA	S.I.N. 999-999-999
SALES DEPARTMENT	1013 Brown, Thomas	CANADA	S.I.N. 999-999-999
SALES DEPARTMENT	2210 Drac, Jeri	CANADA	S.I.N. 999-999-999
ADMINISTRATION	5000 Haile, Jenny	CANADA	S.I.N. 999-999-999
ACCOUNTING	5001 Haile, William	CANADA	S.I.N. 999-999-999
HUMAN RESOURCES	1054 Harper, Betsy	CANADA	S.I.N. 999-999-999
SALES DEPARTMENT	1012 King, Deborah	CANADA	S.I.N. 999-999-999
HUMAN RESOURCES	1052 Mansfield, Katherine	CANADA	S.I.N. 999-999-999
HUMAN RESOURCES	1053 Mansglabe, Jayne	CANADA	S.I.N. 999-999-999
SALES DEPARTMENT	10231 Sampson, Harry	CANADA	S.I.N. 999-999-999
SALES DEPARTMENT	5984 Sartre, Mary-Ellen	CANADA	S.I.N. 999-999-999
SALES DEPARTMENT	1027 Saunders, Carey	CANADA	S.I.N. 999-999-999
<b>Total Employees</b>		<b>15</b>	

## Telephone Extension

The purpose of this report is to display a list of employees' telephone extensions and work email addresses. To produce this report the telephone extension and e-mail must be entered on the Status and Dates screen for each employee.

### Screen Layout



### Sample Report

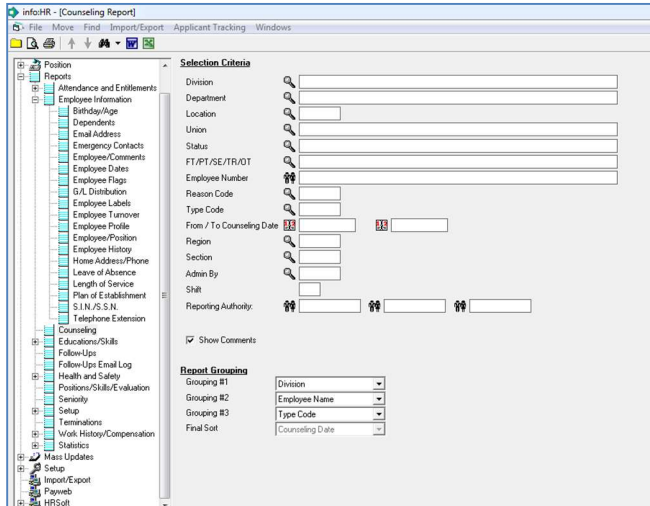
Ext.	Employee Number/Name	Position	Email
1234	11026 Abbott, John	Chief Information Officer	jerryr@infohr.net
4455	3011 Abel, Samantha	HR Generalist	barbarac@infohr.com
567	1051 Adams, Karen	Benefits & Pension Admin	kadams@efer.uk
132	78831 Adams on, Jennifer	Receptionist	
2201	1050 Armstrong-Smith, Grant	Chief Information Officer	tojerryr@gmail.com
1200	1013 Brown, Thomas	Director, Human Resources	tbrown@abc.ca
2300	2028 Browning, Janice	HR Clerk	jbrowning@egca.ca
	5545 Darksey, Pat	Sales Manager	pdarksey@afdfca.ca
2205	1025 Davis, Celia	HR Clerk	cdavis@adfae.ca
	1885 Gillies, Catherine	Director, Human Resources	
1174	5001 Haile, William	Receptionist	whaile@adfae.com
1110	1012 King, Debra	Benefits & Pension Admin	
2215	1231 Sampson, Harry	Receptionist	
2280	1021 Selby, Murray	AR Clerk	
	5505 Smith, Jane	Developer	jsmith1@myoffice.com
	8524 Wessliar, Johnaton	Programmer	sadfas@dfdasl.com



## Counselling

The purpose of this report is to allow the user to pull data from the counselling screen. This report will show counselling history, as well as counselling by specific type or reason codes.

### Screen Layout



- **Reason code** allows the user to ask for a specific counselling reason, and only display results that match that reason code.
- **Type code** allows the user to ask for a specific type code, and only display results that match that type code.
- The report defaults to display comments if they are entered. If the user does not wish to view comments, unselect the **Show Comments** box.
- **Reporting Authority** – if a reporting authority is selected, the report will only display counselling that was conducted by that supervisor.

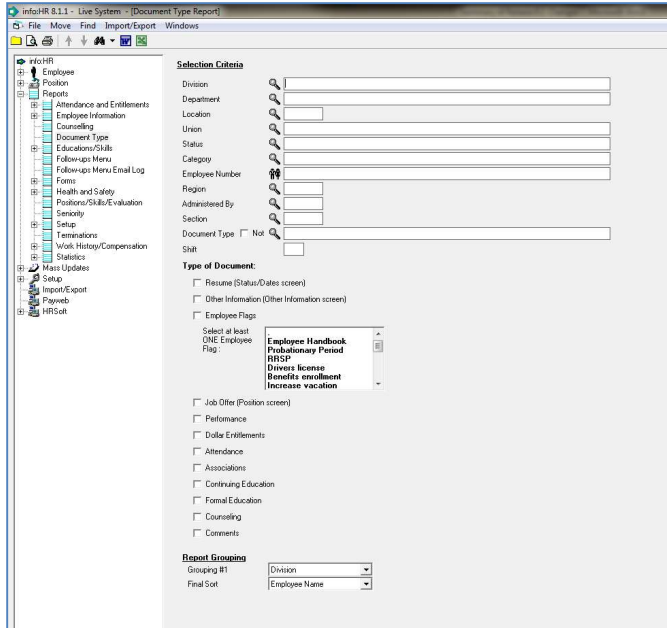
### Sample Report

Employee Number/Name	Counselling Date	Incident Date	Type	Reason	Counselling By
221026 Abbott, John	01/03/2006		Written #1	Drug use in the workplace	Mansglebe, Jayne
<b>Total for</b>	<b>Abbott, John</b>		<b>1</b>		
1050 Armstrong, Bob sawing trees in public park	18/05/2006	18/05/2006	Verbal #1	Breach of green rules	Abbott, John
<b>Total for</b>	<b>Armstrong, Bob</b>		<b>1</b>		
1027 Saunders, Carey	07/03/2006		Verbal #1	Habitual lateness	
1027 Saunders, Carey	21/03/2006		Verbal #2	Habitual lateness	
<b>Total for</b>	<b>Saunders, Carey</b>		<b>2</b>		

## Document Type

The purpose of this report is to indicate the presence or absence of documents attached to employee records on various screens in the system. This report provides the ability to view the screen name and the document type code associated with the document.

## Screen Layout



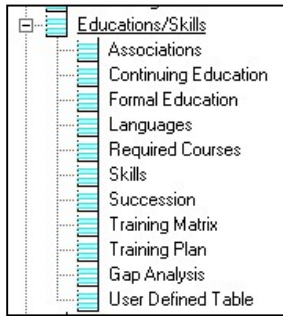
- To view if there are documents attached to a particular area of the system, check the screen where the documents are attached and select a document type code to view the existence of documents attached for employees.
- Items that contain a check box for “Not” -  Not : If you want a report for employees that “don’t” have the particular item, click on the “Not” in the selection criteria.

## Sample Report

Employee Number/Name	Type of Doc.	Document Type	Document Description	Missing?
221026 Abbott, John	RESUME			No
	OFFER			No
	PERFORMANCE			No
	ATTENDANCE			No
	EDSEM			No
221028 Abel, Alex	COUNSEL	Counseling	Counseling Note 2015	No
	RESUME			No
1014 Anderson, Dana	ATTENDANCE			No
	ATTENDANCE			No

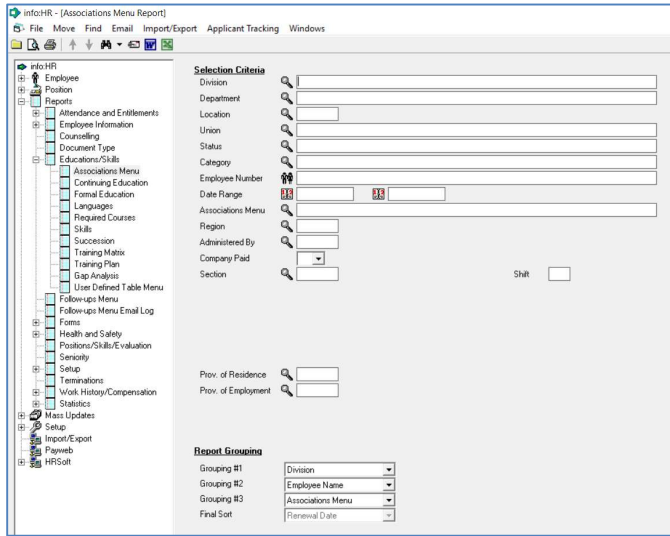
## Education/Skills

This section of the reports menu is designed to produce reports based on information stored in the Education/Skills section of info:HR. Below are the reports included in this section:



## Associations

The purpose of this report is to list all Associations that employees belong to.



### Screen Layout

- **Company Paid** – this drop down will allow the user to specify if they only want to see company paid associations or not. If left blank, all associations will display.

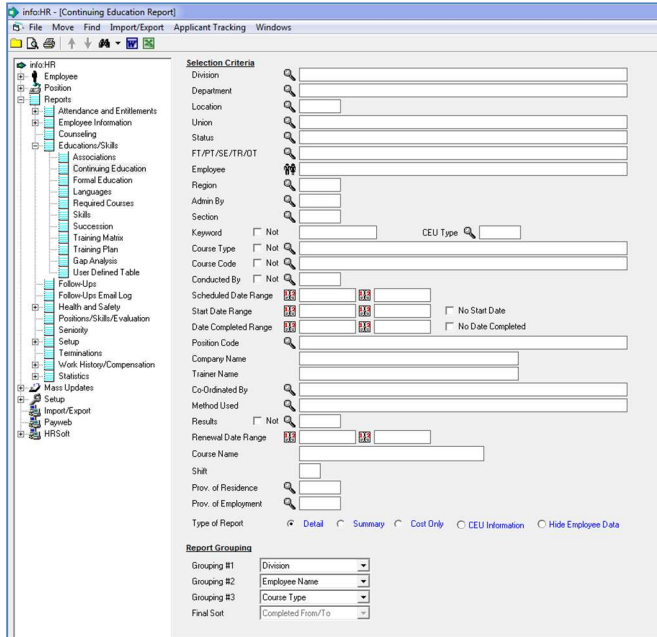
### Sample Report

Employee	Description	Dues Paid	Begin	Renewal	Paid
Abbott, John	CPA ASSN OF LOS ANGELES	\$500.00	1/01/00	1/01/01	Y
	<b>Total Dues Paid:</b>	<b>\$500.00</b>			
Adams, Karen	PIHRA	\$350.00	1/06/99	1/06/00	Y
	<b>Total Dues Paid:</b>	<b>\$350.00</b>			
Armstrong-Smith, Grant	CPA ASSN OF LOS ANGELES	\$640.00	11/01/02	11/01/03	Y
	<b>Total Dues Paid:</b>	<b>\$640.00</b>			
Armstrong-Smith, Grant	PIHRA	\$1,000.00	1/01/03	1/01/04	Y
	<b>Total Dues Paid:</b>	<b>\$1,000.00</b>			
Brown, Thomas	SQL PROGRAMMERS OF S. CALIF	\$850.00	1/01/99	1/01/04	Y
	<b>Total Dues Paid:</b>	<b>\$850.00</b>			
Browning, Janice	CHAMBER OF COMMERCE	\$500.00	5/01/98	5/01/99	Y
	<b>Total Dues Paid:</b>	<b>\$500.00</b>			
Davis, Celia	HUMAN RES OURSES ASSN OF LA	\$575.00	9/01/99	9/01/01	Y
	<b>Total Dues Paid:</b>	<b>\$575.00</b>			
Haile, William	ARMY NATIONAL GUARD		1/01/68		N
	<b>Total Dues Paid:</b>				
	<b>Total Dues Paid:</b>	<b>Employee: \$0.00</b>			
		<b>Company: \$4,415.00</b>			

## Continuing Education

The purpose of this report is to summarize continuing education courses that have been taken. This report can be run to give an overview of courses taken by course type or course code. The user can ask for specific date ranges, renewal dates, results, training methods, etc. It can also be used to identify employees who have not taken a particular course.

### Screen Layout



In comparison with other info:HR reports, this report's selection criteria are unique. There are many options that can be entered into the criteria to produce the desired information. Below is an explanation of how these options can be used.

- Items that contain a check box for “Not” -  Not : If you want a report for a group of employees that “doesn’t” have the particular item - click on the “Not” in the selection criteria. For example: All employees in the Finance Department who have NOT taken Course CPR within the date range of Jan 1-12 to Dec 31-12.
  - “Not” is checked across from Course Code.
  - Course Code for CPR is entered.
  - Date Complete is entered.
- “No Start Date” and “No Date Completed” check boxes:
  - If either is checked, the report only contains courses that have the checked date not entered into the employee’s record.
- Type of Report:
  - **Detail**: Detailed listing of all courses. For each course, the report uses up to 3 print lines.
  - **Summary**: Prints one line per course code taken.
  - **Cost Only**: Prints the costs associated with each course taken.
  - **CEU Information**: Prints the CEU Information for courses displayed.
  - **Hide Employee Data**: Prints a course code summary report showing number of employees per course code.

# info:HR Reports User Manual

## Sample Report – Detailed Education/Seminar Report

Time: 2:42:15 PM		Detailed Education/Seminars Report				RZE SEM1	
Employee	Course Code	Course Type/Course Name/Course Description	Conducted By/Results	Course Dates	Keyword	Course Hours	
Smith, Jane	ADMN / PER	Administration Global Staffing 101	Attended	Scheduled Date Start Date Date Complete: 5/03/13 Renewal Date:		0.00	
Smith, Jane	ADMN / HRP	Administration HR 101	Internal Attended	Scheduled Date Start Date Date Complete: 11/03/12 Renewal Date:		0.00	
Smith, Jane	HS / CPR	Health & Safety CPR Basic Retrain		Scheduled Date Start Date Date Complete: 5/31/13 Renewal Date:		0.00	
Smith, Jane	PD / ABCL101	Professional Development Learning 101		Scheduled Date Start Date Date Complete: 1/28/13 Renewal Date:		0.00	
<b>Smith, Jane</b>			<b>Number of Courses:</b>	<b>4</b>	<b>Total Course Hours:</b>	<b>0.0</b>	
Browning, Janice	ADMN / PER	Administration Global Staffing 101	Attended	Scheduled Date Start Date Date Complete: 5/03/13 Renewal Date: 5/03/15		0.00	
Browning, Janice	ADMN / HRP	Administration HR 101	Internal Attended	Scheduled Date Start Date Date Complete: 11/03/12 Renewal Date:		0.00	

## Sample Report – Summary Education/Seminar

Time: 3:18:24 PM		Summary of Education/Seminars Report				RZE SEM1S	
Employee	Course Code	Course Name	Course Type	Start Date	Date Completed	Renewal Date	Hours
Smith, Jane	GLOBAL STAFFING	Global Staffing 101	Administration		5/03/13		0.00
Smith, Jane	HR Practices	HR 101	Administration		11/03/12		0.00
Smith, Jane	CPR	CPR Basic	Health & Safety		5/31/13		0.00
Smith, Jane	ABC of Learning 101	Learning 101	Professional Development		1/28/13		0.00
<b>Smith, Jane</b>			<b>Number of Courses:</b>	<b>4</b>	<b>Total Course Hours:</b>		<b>0.00</b>
Browning, Janice	GLOBAL STAFFING	Global Staffing 101	Administration		5/03/13	5/03/15	0.00
Browning, Janice	HR Practices	HR 101	Administration		11/03/12		0.00
Browning, Janice	CPR	CPR Basic	Health & Safety	7/14/09	8/29/11	7/14/10	8.00
Browning, Janice	ABC of Learning 101	Learning 101	Professional Development		1/28/13		0.00
Browning, Janice		What is the Internet?	Professional Development	1/15/98	1/15/98		8.00
<b>Browning, Janice</b>			<b>Number of Courses:</b>	<b>6</b>	<b>Total Course Hours:</b>		<b>16.00</b>
Halle, William	GLOBAL STAFFING	Global Staffing 101	Administration		5/03/13		0.00
Halle, William	HR Practices	HR 101	Administration		11/03/12		0.00
Halle, William	CPR	CPR Level 1	Health & Safety		3/29/12		0.00
Halle, William	CPR	CPR Basic	Health & Safety	7/14/09	8/29/11	7/14/10	8.00
Halle, William	CPR	CPR Basic	Health & Safety	7/14/09	7/14/09	7/14/10	8.00
Halle, William	ABC of Learning 101	Learning 101	Professional Development		1/28/13		0.00
<b>Halle, William</b>			<b>Number of Courses:</b>	<b>6</b>	<b>Total Course Hours:</b>		<b>8.00</b>

## Sample Report – Cost Only Education/Seminar

Time: 3:28:10 PM		Detailed Continuing Education Report - Costs Only							RZE SEMC1	
Employee	Course Code	Hours	Completed Date	Employee \$	Other \$	Employer \$	Accommodation	Learning Material \$	Total	
Adams, Karen	CPR	8.00	7/14/09	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
		4.00	9/23/00	\$ 0.00 CDN	\$ 0.00 CDN	\$ 250.00	\$ 0.00 CDN	\$ 0.00 CDN	\$ 250.00	
	EEO Reporting ABC of Learning 101	8.00	6/01/15	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
		8.00	1/28/13	\$ 0.00 CDN	\$ 0.00 CDN	\$ 0.00 CDN	\$ 0.00 CDN	\$ 0.00	\$ 0.00 CDN	
<b>Totals for: Adams, Karen</b>				<b>\$0.00</b>	<b>\$250.00</b>	<b>\$500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$750.00</b>	
Adamson, Jennifer	GLOBAL STAFFING	0.00	5/03/13	\$ 0.00	\$ 250.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 250.00	
		0.00	11/03/12	\$ 0.00	\$ 0.00	\$ 250.00	\$ 0.00	\$ 0.00	\$ 250.00	
	EEO Reporting ABC of Learning 101	2.00	5/03/13	\$ 0.00 CDN	\$ 0.00 CDN	\$ 0.00 CDN	\$ 0.00 CDN	\$ 0.00	\$ 0.00 CDN	
		0.00	1/28/13	\$ 0.00 CDN	\$ 0.00 CDN	\$ 0.00 CDN	\$ 0.00 CDN	\$ 0.00	\$ 0.00 CDN	
<b>Totals for: Adamson, Jennifer</b>				<b>\$0.00</b>	<b>\$250.00</b>	<b>\$250.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$500.00</b>	

## Sample Report – CEU Information

Time: 8:59:34 AM		CEU Information				RZE SEMCEU1T	
Employee No. / Name	Course Description	Trainer Name	Date Completed	CEU Type	CEU Credit		
11026 Abbott, John	HR Practices EMPLOYEE RELATIONSHIPS IN A CHANGING ENVIR	Jerry	3/22/11	Professional Development	0.20		
11026 Abbott, John	HR Practices	Jerry	11/03/12	Professional Development	1.00		
11026 Abbott, John	GLOBAL STAFFING	Jerry	5/03/13	Professional Development	0.50		
11026 Abbott, John	Course Description not Name CPR		2/05/14	Professional Development	2.50		
<b>Abbott, John</b>		<b>Number of Courses:</b>	<b>4</b>	<b>Total CEU Credit:</b>	<b>4.20</b>		
<b>Abbott, John</b>		<b>Number of Employees:</b>	<b>1</b>				
3011 Abel, Samantha	ABC of Learning 101	Jerry	7/31/14	Professional Development	2.00		
<b>Abel, Samantha</b>		<b>Number of Courses:</b>	<b>1</b>	<b>Total CEU Credit:</b>	<b>2.00</b>		
<b>Abel, Samantha</b>		<b>Number of Employees:</b>	<b>1</b>				
<b>Grand Totals:</b>		<b>Number of Courses:</b>	<b>5</b>	<b>Total CEU Credit:</b>	<b>6.20</b>		
		<b>Number of Employees:</b>	<b>2</b>				

# info:HR Reports User Manual

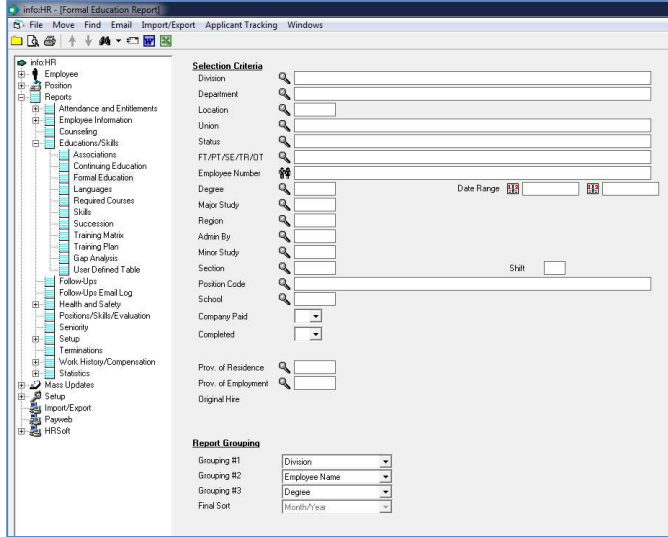
## Sample Report – Hide Employee Data

Time: 9:02:24 AM		Education/Seminars Summary Report By Course					RZESENOEMP	
Course Code	Course Type	Date Completed	Course Hours	Employee	***** Course Cost *****		Total	# of Employees
					Employee	Other		
ABCL101	PD	01/28/2013	0.00	\$0.00	\$0.00	\$0.00	\$0.00	14
ABCL101	PD	07/31/2014	1.00	\$25.00	\$0.00	\$0.00	\$25.00	1
AODA	HS	09/25/2010	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
CPR	HS	07/14/2009	80.00	\$0.00	\$0.00	\$0.00	\$0.00	6
CPR	HS	09/24/2011	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
CPR	HS	08/29/2011	0.00	\$0.00	\$0.00	\$0.00	\$0.00	5
CPR	HS	03/29/2012	0.00	\$0.00	\$0.00	\$0.00	\$0.00	3
CPR	HS	07/19/2012	1.00	\$95.00	\$0.00	\$0.00	\$95.00	1
CPR	HS	05/31/2013	0.00	\$0.00	\$0.00	\$0.00	\$0.00	2
CPR	HS	02/05/2014	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
EEO	ADMN	06/15/2010	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
EEO	PD	05/03/2013	8.00	\$0.00	\$0.00	\$0.00	\$0.00	4
EEO	PD	06/01/2015	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
HRP	ADMN	08/22/2011	8.00	\$500.00	\$0.00	\$0.00	\$500.00	1
HRP	ADMN	11/03/2012	0.00	\$3,500.00	\$0.00	\$0.00	\$3,500.00	13
HSD	HS	05/24/2011	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
HSD	HS	06/06/2014	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
LTS	ADMN	01/14/2014	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
PER	ADMN	09/15/2009	8.00	\$1,500.00	\$0.00	\$0.00	\$1,500.00	1
PER	ADMN	05/03/2013	0.00	\$0.00	\$0.00	\$3,500.00	\$3,500.00	12
PER	PD	05/29/2013	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
WMIN	HS	06/30/2010	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
WMIN	HS	05/24/2011	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
WMIN	HS	06/06/2014	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
WMIN	HS	06/18/2014	0.00	\$0.00	\$0.00	\$0.00	\$0.00	1
<b>Grand Total:</b>			<b>\$106.00</b>	<b>\$5,620.00</b>	<b>\$0.00</b>	<b>\$3,500.00</b>	<b>\$9,120.00</b>	<b>15</b>

## Formal Education

The purpose of this report is to list all formal education for each employee. This report can be generated asking for a specific school, or who has a specific major or minor.

### Screen Layout



- The report can be generated asking for one degree by selecting one from the **Degree** lookup.
- The report can be generated asking for one major study by selecting one from the **Major of Study** lookup.
- The report can be generated asking for one minor study by selecting one from the **Minor of Study** lookup.
- The report can be generated asking for one school employees attended by selecting one from the **School** lookup.
- The report can be generated asking for education that is company paid or not by selecting Yes or No in the **Company Paid** dropdown.
- The report can be generated asking for education that is completed or not by selecting Yes or No in the **Completed** dropdown.

### Sample Report

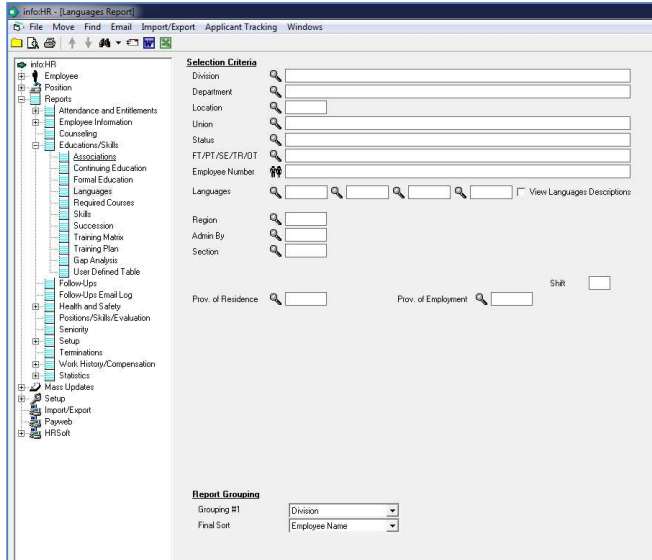
Time: 8:19:52 PM		Formal Education Report			RZFORME1	
Name	School	Major/Minor Study	Completed	Year	Degree Obtained	Company
Abbott, John	UNIVERSITY OF GUELPH	ADMINISTRATIVE & COMMERCIAL ST COMPUTER SCIENCE	Y	01/06/1982	BACHELOR OF ARTS	N
Armstrong, Bob	UNIVERSITY	ACCOUNTING COMPUTER SCIENCE	Y	01/05/1985	BACHELOR OF ARTS	N
Armstrong, Bob	CHARTERED ACCOUNTANTS	ACCOUNTING	Y	12/09/1989	CHARTERED ACCT	N
Mansfield, Katherine	UNIVERSITY		Y		BACHELOR OF ARTS	N
Mansfield, Katherine	GEORGE BROWN COLLEGE	HUMAN RESOURCES	Y	15/12/2001	DIPLOMA	N
Sartre, Mary-Ellen	YORK UNIVERSITY	ADMINISTRATIVE & COMMERCIAL ST	Y	07/06/1991	BACHELOR OF ARTS	N
Saunders, Carey	UNIVERSITY	HISTORY	Y	31/05/2001	BACHELOR OF ARTS	N
Total Number of Employees in Company is:				5		



## Languages

The purpose of this report is to list who speaks and writes various languages. Another way to generate this report is to ask for a specific language, and listing who speaks or writes it.

### Screen Layout



- To generate the report asking for a specific language, select the language from the lookup. Up to 4 languages can be selected at once.
- To generate the report with all languages listed, leave Languages blank.

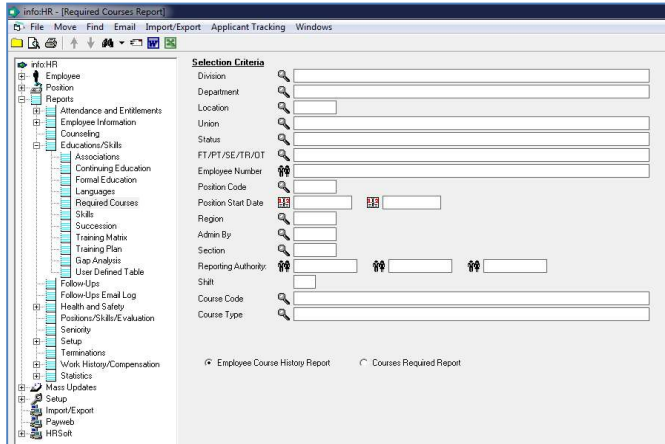
### Sample Report

Time: 8:21:05 PM		Language Report	
Employee Name	Language Spoken	Language Written	
Abbott, John	ENGLISH	ENGLISH	
	GERMAN	GERMAN	
	FRENCH	FRENCH	
Adams, Karen	ENGLISH	ENGLISH	
	POLISH	POLISH	
	SPANISH	GERMAN	
Armstrong, Bob	FRENCH	FRENCH	
	FRENCH	ENGLISH	
Drac, Jeri	GERMAN	POLISH	
	ENGLISH	ENGLISH	
<b>Total Number of Employees in Company</b>		<b>10</b>	

## Required Courses

The purpose of this report is to list employees and the courses that are required for their position held. To produce this report Required Courses must be set up for the Position in the Position Master.

### Screen Layout



- Using the **Employee Course History Report** selection you will be able to view the courses completed, the date they were completed, and a renewal date.
- Using the **Courses Required Report** selection you will be able to view the courses required as of the Renewal Date.

### Sample Report - Employee Course History Report

Time: 3:25:05 PM		Employee Course History Report		RZCOURSEHIST	
Division: Canadian Branch		Department: Human Resources		Shift: Non Union	
				Machine:	
Course Name	Position	Position Type	Course Taken	Renewal Date	
<b>Abel, Samantha</b>					
Excel Review			Not Taken	12/01/14	
GLOBAL STAFFING	HR Generalist	Primary	Not Taken	12/10/14	
Accessibility Act	HR Generalist	Primary	Not Taken	6/10/14	
ABC of Learning 101			7/31/14		
WNMIS			6/30/10	6/18/15	
WNMIS	HR Generalist	Primary	6/18/14		
EEO Reporting	HR Clerk	Primary	6/15/10		
Health & Safety Orientation Aw	HR Clerk	Primary	6/06/14		
Number of Employees in Canadian Branch		1			

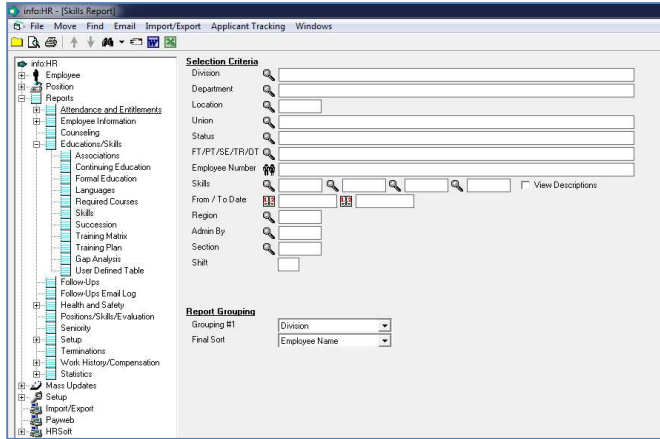
### Sample Report - Course Required Report

Time: 11:31:28 AM		Employee Course History Report		RZCOURSEHIST	
Division: Eastern US Branch		Department: Cal Regional Office		Shift: Non Union	
				Machine:	
Course Name	Position	Position Type	Course Taken	Renewal Date	
<b>King, Debra</b>					
EEO Reporting	Benefits & Pension Admin	Primary	Not Taken	8/18/11	
CPR			9/29/11		
<b>Browning, Janice</b>					
CPR			9/29/11	1/15/98	
<b>Haile, William</b>					
CPR			3/29/12		
Number of Employees in Eastern US Branch		3			

## Skills

The purpose of this report is to list the skills of all employees. Another way to generate this report is to ask for a specific skill, and listing who has that skill.

### Screen Layout



- To generate this report to display employees with specific skills, select up to four skills from the **Skills** lookup.
- The From/To Date will allow the user to specify a time frame in which the skill was acquired.

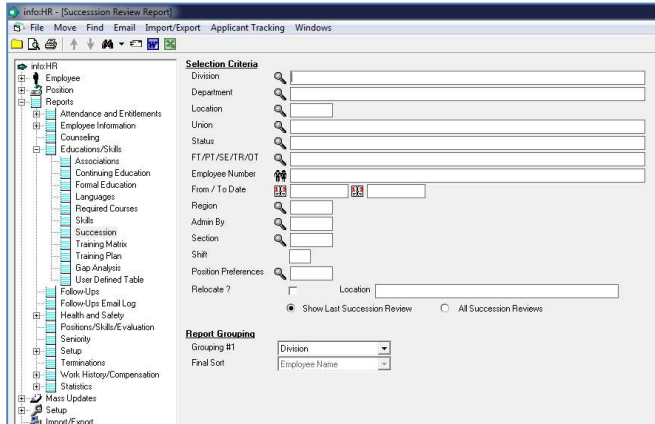
### Sample Report

Time	8:24:08 PM	Skills Report by Employee	RZSKLL1		
Employee Nbr. / Name	Skill	Level	Date	Comments	
221026	Abbott, John	N411 Missing Description	0	12/07/1996	USING NOVELL NETWORKS IN AN OFFICE ENVIRONMENT
221026		NOSK Missing Description	0	11/10/1996	
221026		COMPUTERS	0	14/12/2010	xxxxx
221026		MGMT CONSULTING	0	14/10/1999	What is the Internet? Terms used while on the Internet
1051	Adams, Karen	COMPUTERS	0	15/01/1998	What is the Internet? Terms used while on the Internet
1014	Anderson, Dane	COMPUTERS	0	14/12/2010	xxxxx
1050	Armstrong, Bob	COMPUTERS	0	18/02/2000	INTRO TO WEB SITE DESIGN THE BASIC S OF HTML NEEDED TO DEVELOP A
1050		COMPUTERS	80	15/01/1998	What is the Internet? Terms used while on the Internet
1050		INFO-HR EXPERIENCE	0	13/06/2002	INFO-HR ESS USAGE INSTALLATION OF ESS IN THE ORGANIZATION
1050		INFO-HR EXPERIENCE	0	16/03/2008	Advanced INFO-HR
1050		INFO-HR EXPERIENCE	90	11/10/1999	Attended INFO-HR training courses during thr installation of the system.
1050		MACHINE OPERATIONS ENTRY LEVEL	1	15/06/2001	hris
1050		Performance reviews	0	17/04/2001	ORG THEORY FOR MANAGERS INTRO TO ORG DYNAMICS IN SMALL GROUPS
1050		Privacy Leg'n Guru	0	15/01/2004	PIPEDA Privacy Leg'n
1054	Harper, Betsy	COMPUTERS	0	14/12/2010	xxxxx
1052	Mansfield, Katherine	HR GENERALIST EXPERIENCE	0		
10231	Sampson, Harry	COMPUTERS	0	14/12/2010	xxxxx
5984	Sarve, Mary-Ellen	Performance reviews	90	15/10/1999	PERFORMANCE REVIEW METHODS

## Succession

The purpose of this report is to view the Succession plans for each employee.

### Screen Layout



- Using the **Position Preferences** you will be able to view plans of employees who have shown interest in a specific position.
- When **Relocate?** Is checked you will see employees who will relocate. You may enter a **Location** to view employees who will relocate to a specific location.
- When **Show Last Succession Review** is selected you will be viewing only the latest Succession Review. When **All Succession Reviews** is selected you will be viewing all reviews for each employee.

### Sample Report – Relocate checked and Show Last Succession Plan

Employee Name	Position	Promotability	Relocation
Abel, Samantha	Health & Safety C	24 Months	US
<b>Current Succession Review</b>			
Date: 5/13/13			
Strengths: Analytical problem solver			
Weaknesses: Leadership			
Development Plan: Take leadership courses, gain more knowledge of HR practices in the organization. Complete required courses.			
Position Preferences: Director, Human Resources Western Regional Manager			

### Sample Report – All Succession Reviews

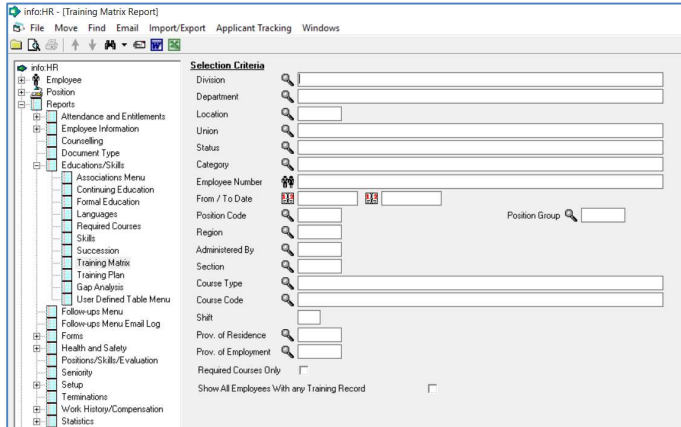
Employee Name	Position	Promotability	Relocation
Abel, Samantha	Health & Safety C	36 Months	US
<b>Current Succession Review</b>			
Date: 5/01/12			
Strengths: Able to see H&S issues and solve them diplomatically			
Weaknesses: Experience in the field.			
Development Plan: More experience through daily duties and independent research.			
Position Preferences: Director, Human Resources Western Regional Manager			
<b>Current Succession Review</b>			
Date: 5/13/13			
Strengths: Analytical problem solver			
Weaknesses: Leadership			
Development Plan: Take leadership courses, gain more knowledge of HR practices in the organization. Complete required courses.			
Position Preferences: Director, Human Resources Western Regional Manager			

# info:HR Reports User Manual

## Training Matrix

The purpose of this report is to provide the user with a visual breakdown of courses, employee completion dates and Legislative or Organization requirements. This report will open in Excel. Legends at the top of the report will indicate colour meaning and requirements.

### Screen Layout



- To view all employees check the **Show All Employees** box.
- To view only required courses check the **Required Courses Only** box.

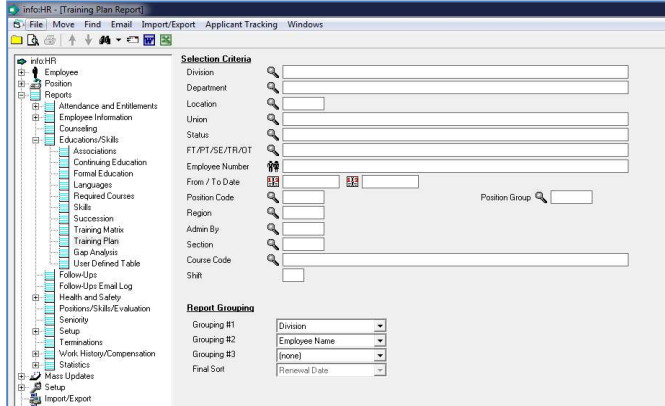
### Sample Report

Date: Apr 09, 2013		Training Matrix													
Time: 20:35:41		No date entered													
Training in Good Standing		R - Required Courses													
Training will Expire in Thirty Days		L = Legislated Courses													
Training Not in Good Standing		N/A - Course not required for that position													
Division	Team	Employee #	Name	Job Title	Location	Original Hire	Course Taken	Advanced I Budget for i CPR	CPR	HT	INFO	ORI			
							AJ B								
							R								
1001	ACCT	5001	Halle, William	RECEPTIONIST		30/06/1992	06/01/2006	N/A	N/A	N/A	N/A	N/A			
1001	FINADMN	1050	Armstrong, Bob	DIRECTOR, HUMAN RESOURCES	2C	10/03/1994	03/05/2005	03/05/2005	03/05/2011	N/A	N/A	N/A			
1001	SALE	1013	Brown, Thomas	FINANCE & ADMIN. MANAGER		30/06/1988	06/01/2006	N/A	N/A	N/A	N/A	N/A			
1001	SALE	1012	King, Deborah	DIRECTOR, HUMAN RESOURCES		25/05/1985	N/A	N/A	N/A	N/A	N/A	N/A			
8000	ACCT	1051	Adams, Karen	ACCOUNTS PAYABLE CLERK		02/01/2000	08/08/2011	N/A	N/A	N/A	N/A	N/A			
2000	SALE	10231	Sampson, Harry	SALES REPRESENTATIVE		12/01/1990	N/A	N/A	N/A	N/A	N/A	N/A			
2000	SALE	1027	Saunders, Carey	SALES REPRESENTATIVE		15/09/1990	N/A	N/A	N/A	N/A	N/A	N/A			
8000	ADMIN	5000	Halle, Jenny	TELESALES REPRESENTATIVE		06/01/1983	N/A	N/A	N/A	N/A	N/A	N/A			
8000	FINADMN	221025	Abbott, John	President	MISS	01/02/1992	06/01/2006	N/A	N/A	N/A	N/A	N/A			
8000	FINADMN	1014	Anderson, Dane	HR CLERK		03/08/1988	N/A	N/A	N/A	N/A	N/A	N/A			
8000	SALE	5884	Satre, Mary-Ellen	BRANCH MANAGER	MISS	06/01/1994	N/A	N/A	N/A	N/A	N/A	N/A			
ABC	HR	1054	Harper, Betsy	Office Administrator		23/07/1994	N/A	N/A	N/A	N/A	N/A	N/A			
ABC	HR	1052	Mansfield, Katherine	HR CLERK		28/07/2009	N/A	N/A	N/A	N/A	N/A	N/A			
ABC	HR	1053	Mansglobe, Jayne	HR CLERK		01/01/1982	N/A	N/A	N/A	N/A	N/A	N/A			
ABC	SALE	2210	Drac, Jeni	SALES MANAGER	SWO	15/01/1990	N/A	N/A	N/A	N/A	N/A	N/A			

## Training Plan

The purpose of this report is to provide the user with information on the Training Plans created based on an employee's position and required courses. Individual courses added to the employee's Training Plan are also printed. You will be able to view courses dates taken, renewal dates and whether the course is a requirement of the position.

### Screen Layout



- To view only specific course use the **Course Code** selection criteria to enter only the courses you wish to view.

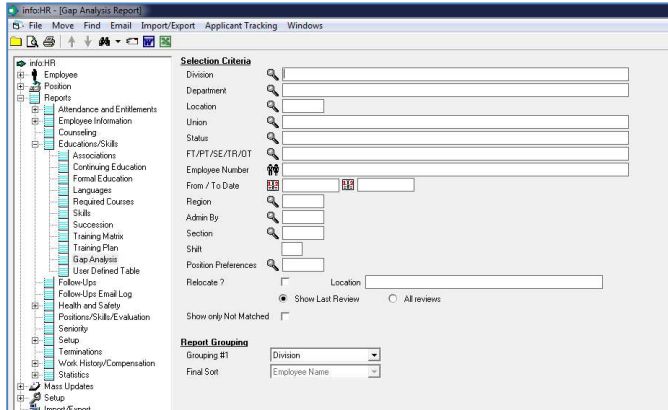
### Sample Report

Employee	Position/Start Date	Position Dependent?	Course	Renewal Date	Course Taken
Abbott, John	Chief Information Officer / 2/01/00	Yes	EEO Reporting	05/01/2000	
Abel, Samantha	HR Generalist / 01/01/14	No	Excel Review	12/01/2014	
Abel, Samantha	HR Generalist / 01/01/14	Yes	GLOBAL STAFFING	12/16/2014	
Abel, Samantha	HR Generalist / 01/01/14	Yes	WMMIS	06/16/2015	06/16/2014
Abel, Samantha	HR Generalist / 01/01/14	Yes	Accessibility Act	06/16/2014	
Adams, Karen	Benefits & Pension Admin / 8/01/12	Yes	EEO Reporting	06/01/2016	06/01/2015
Adams, Jennifer	Receptionist / 10/16/13	Yes	EEO Reporting	01/16/2014	
Armstrong-Smith, Grant	Chief Information Officer / 4/01/00	Yes	EEO Reporting	07/01/2000	
Brown, Thomas	Director, Human Resources / 1/31/11	Yes	EEO Reporting	07/22/2013	
Browning, Janice	HR Clerk / 6/01/00	Yes	Health & Safety Orientation Aw	08/01/2000	
Browning, Janice	HR Clerk / 6/01/00	Yes	EEO Reporting	06/01/2000	
Browning, Janice	HR Clerk / 6/01/00	Yes	WMMIS	06/01/2000	
Browning, Janice	HR Clerk / 6/01/00	Yes	GLOBAL STAFFING	05/03/2015	05/03/2013
Darksey, Pat	Sales Manager / 7/31/12	Yes	EEO Reporting	10/31/2012	
Davis, Cella	HR Clerk / 5/01/06	Yes	Health & Safety Orientation Aw	07/01/2006	
Davis, Cella	HR Clerk / 5/01/06	Yes	EEO Reporting	08/01/2006	
Davis, Cella	HR Clerk / 5/01/06	Yes	WMMIS	08/01/2006	
Davis, Cella	HR Clerk / 5/01/06	Yes	GLOBAL STAFFING	05/03/2015	05/03/2013
Gilles, Catherine	Director, Human Resources / 5/30/11	Yes	EEO Reporting	08/30/2014	
Halle, William	Receptionist / 5/22/93	Yes	EEO Reporting	08/22/1993	
King, Debra	Benefits & Pension Admin / 6/18/11	Yes	EEO Reporting	08/18/2011	
Sampson, Harry	Receptionist / 4/30/95	Yes	EEO Reporting	07/30/1995	
Selby, Murray	AR Clerk / 1/01/97	Yes	EEO Reporting	04/01/1997	
001 Number of Courses		23			
Number of Employees		14			
Grand Totals:		Number of Courses:	23		
		Number of Employees:	14		

## Gap Analysis

This report uses data from the Succession Planning screen and compares the employee's Position Preference's Required Courses to the courses taken under Continuing Education, and identifies courses required should the employee be moved into one of their Position Preferences.

### Screen Layout



- If “Position Preferences” has a Position Code entered, the report only prints an employee who has the matching Position Code in their Position Preferences.
- If “Show only Not Matched” is checked, only Course Codes that haven't been taken will appear on the report.

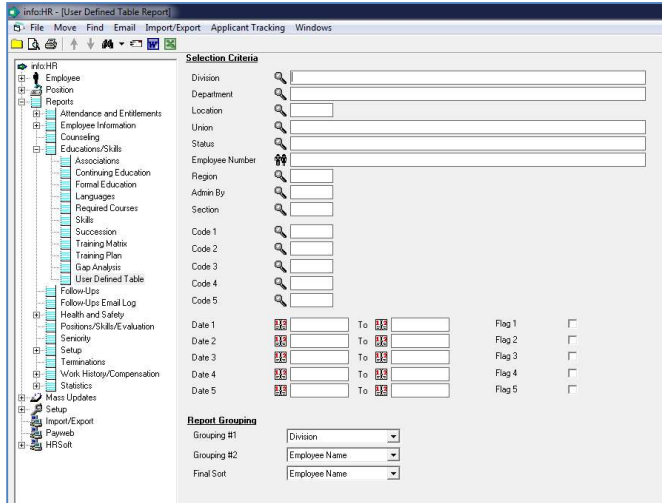
### Sample Report

Time	Gap Analysis Report			RZGapAnalysis1
Employee Name	Position	Position Preference	Position Required Skills	Employee Match/Not Match
Armstrong, Bob	FINANCE & ADMIN. MANAG	DIRECTOR, HUMAN RESOUR	HR GENERALIST EXPERIEN INFO.HR EXPERIENCE	No Yes

## User Defined Table

This report prints data entered into the User Defined Table under Education/Skills section of info:HR.

### Screen Layout



### Sample Report

Time: 8:41:26 PM Seasonal/Casual Dates RZU SERDEF

Employee Name Saunders, Carey

Employee Name  
Saunders, Carey

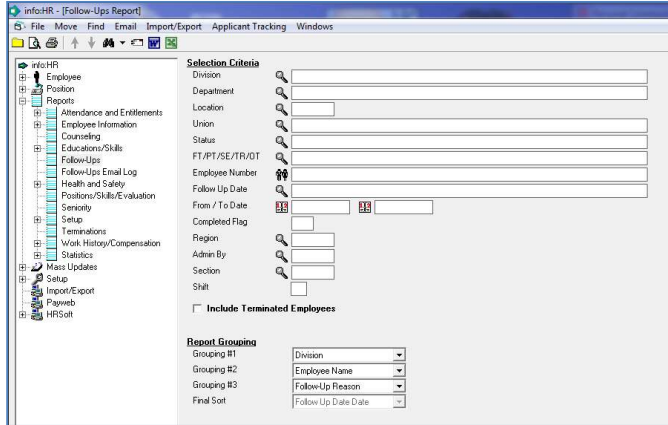
Category	Seasonal	Employment start	Employment end	NA	False
NA		1/03/2012	3/30/2012	NA	False
NA		NA	NA	NA	False
NA		NA	NA	NA	False
NA		NA	NA	NA	False
Text 1		Text 2			
Comments					
Category	Casual	Employment start	Employment end	NA	False
NA		11/28/2011	12/30/2011	NA	False
NA		NA	NA	NA	False
NA		NA	NA	NA	False
NA		NA	NA	NA	False
Text 1		Text 2			
Comments					



## Follow-Ups

The purpose of this report is to view all Follow-Up records in the system with the status of the follow-up and dates associated with it.

### Screen Layout



- You can use the **Complete Flag** to select either completed follow-ups by entering a “Y” or incomplete follow-ups by entering a “N”
- If you wish to view terminated employees on the same report check the **Include Terminate Employees** check box.

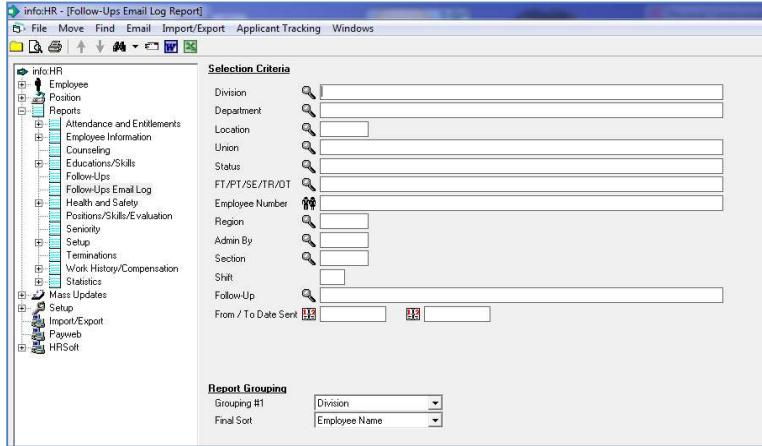
### Sample Report

Employee Name	Follow-up	Date	Completed
Anderson , Dane <b>Comments:</b> LOA: ANDERSON, DANA was on leave from November 30, 2009 This employee's absence leave was extended on Nov 25, 2009 This employee was re-activated on Jan 01, 2010	LEAVE OF ABSENCE	31/12/2009	Yes
Armstrong , Bob <b>Comments:</b> Conflict of interest form -	Conflict of interest form	31/01/2012	No
Armstrong , Bob <b>Comments:</b> Drivers license -	Drivers license renewal	01/11/2009	Yes
<b>Comments:</b> Drivers license -	Drivers license renewal	27/06/2011	Yes
<b>Comments:</b> Drivers license - G2507-98765-12345	Drivers license renewal	27/08/2016	No
Armstrong , Bob <b>Comments:</b> PIPEDA Privacy Leg'n	EDUCATION FOLLOW UP	31/07/2009	Yes
<b>Comments:</b> Safety in the workplace	EDUCATION FOLLOW UP	30/07/2009	Yes
<b>Comments:</b> CPR	EDUCATION FOLLOW UP	20/08/2010	Yes
<b>Comments:</b> CPR	EDUCATION FOLLOW UP	31/05/2013	No
<b>Comments:</b> Course: CPR - CPR	EDUCATION FOLLOW UP	01/03/2013	Yes

## Follow-Ups Email Log

Use this report to view a list of follow up emails were sent out to whom and this report will show sent or a failure if they were not sent.

### Screen Layout



### Sample Report

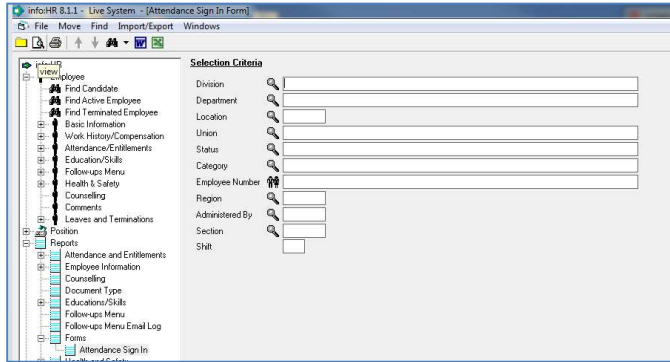
Date: 02/17/2015		HR Systems Strategies Inc.		Page: 1	
Time: 10:02:27 AM		Follow Up Email Log Report		RZFOLLOWEMAILL	
Division: West Coast Branch					
Employee Number/Name	Alert	Effective Date	Email Sent	Sent to	Status
11026 Abbott, John	Associations Renewal	01/02/2001	11/13/2014	Failed to send email to: 11026-johna@xyz.com; 11026-johna@xyz.com, 1051-hemum@infohr.net; 1051-hemum@infohr.net; 1050-hemum@infohr.net; hemum@infohr.net; hemum@infohr.net; hemum@infohr.net	FAILED
11026 Abbott, John	Associations Renewal	01/02/2001	12/04/2014	Email sent successfully to: 11026-johna@xyz.com, 11026-johna@xyz.com; 1051-hemum@infohr.net; 1051-hemum@infohr.net; 1050-hemum@infohr.net; hemum@infohr.net; hemum@infohr.net; hemum@infohr.net	SENT
11026 Abbott, John	Associations Renewal	01/02/2001	12/16/2014	Failed to send email to: 1051-hemum@infohr.net; 1051-hemum@infohr.net; 1050-hemum@infohr.net; hemum@infohr.net; hemum@infohr.net; hemum@infohr.net	FAILED
11026 Abbott, John	Associations Renewal	01/02/2001	12/16/2014	Failed to send email to: 1051-hemum@infohr.net; 1051-hemum@infohr.net; 1050-hemum@infohr.net; hemum@infohr.net; hemum@infohr.net; hemum@infohr.net	FAILED
11026 Abbott, John	Associations Renewal	01/02/2001	12/16/2014	Failed to send email to: 1051-hemum@infohr.net; 1051-hemum@infohr.net; 1050-hemum@infohr.net; hemum@infohr.net; hemum@infohr.net; hemum@infohr.net	FAILED
11026 Abbott, John	Associations Renewal	01/02/2001	12/16/2014	Failed to send email to: 1051-hemum@infohr.net; 1051-hemum@infohr.net; 1050-hemum@infohr.net; hemum@infohr.net; hemum@infohr.net; hemum@infohr.net	FAILED
11026 Abbott, John	Associations Renewal	01/02/2001	12/16/2014	Email sent successfully to: 1051-hemum@infohr.net; 1051-hemum@infohr.net; 1050-hemum@infohr.net; hemum@infohr.net; hemum@infohr.net; hemum@infohr.net	SENT
<b>Totals For West Coast Branch</b>		<b>Number of records</b>	<b>7</b>		
		<b>Total Employees</b>	<b>1</b>		

## Forms

### Attendance Sign In

This report may be used to create an Attendance Sign In Form for a selected group of employees.

### Screen Layout



### Sample Report

A1		Date				
	A	B	C	D	E	F
1	Date			Time		
2	Topic					
3		NAME	DEPARTMENT	SIGNATURE	DATE	
4		Alex Abel	ADMINISTRATION			
5		bbb bbb	INSIDE WORKERS			
6		Betsy Harper	HUMAN RESOURCE			
7		Bob Armstrong	FINANCE & ADMIN			
8		Carey Saunders	ALES DEPARTMEN			
9		Dane Anderson	FINANCE & ADMIN			
10		Deborah King	ALES DEPARTMEN			
11		Harry Sampson	ALES DEPARTMEN			

## Health and Safety

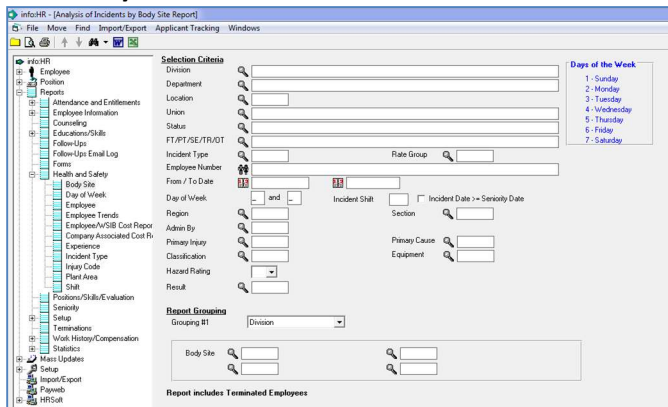
When the Health and Safety section is utilized in info:HR the information entered will be used to create Analysis Reports. All reports in this section include Active and Terminated employees that fall into the section criteria entered on the screen. Below are the reports included in this section.



## Body Site

This report displays and summarizes the Health & Safety Incidents by Type and Classification of incident according to where, on the body, the injury occurred.

## Screen Layout



- The Selection Criteria allows you to enter up to **4 Body Site** codes for reporting on.
- Use **Day of Week** to report on selected days of the week.

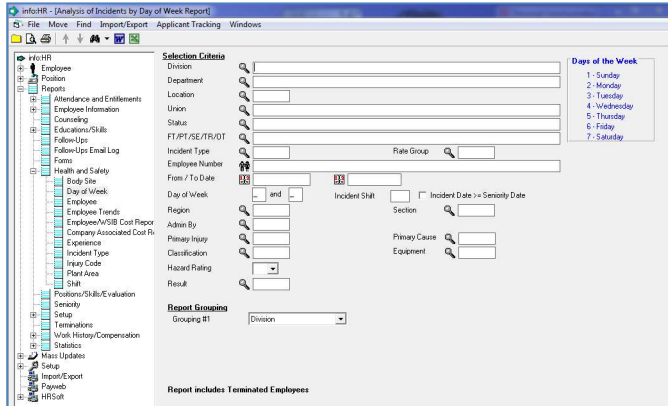
## Sample Report

Time: 1:37:26 PM		Analysis of Incidents by Body Site		RZINBODY	
<b>Division</b>		Central Branch			
<b>Body Site:</b>	HAND	<b>% of all incidents</b>	12.50%	<b>Number of Incidents</b>	3
<b>From-To-Date:</b>	4/29/92 9/09/11	<b>Total Number of Incidents</b>	24		
<b>Type</b>	<b>Class'n</b>	<b>Cause/Task</b>	<b>Injury</b>	<b>Plant Area/Equipment ID</b>	
FA	FIRST AID	INCORRECT PLACEMENT OF EQUIP.	Crushing Injury	DECAST DECAST MACHINE	
		INCORRECT USE OF THE EQUIPMENT CUTTING PAPER	BRU/E		
FA	MEDICAL AID	INCORRECT USE OF THE EQUIPMENT FIXING THE DE-CAST MACHINE DURING MTCE.	CUT	DECAST DECAST MACHINE	

## Day of the Week

This report displays and summarizes the Health & Safety Incidents that occurred during the time period (From / To Date) entered. The dates entered are based on the Incident Date. If you wish to generate a report that details the Incidents that occurred on a specific day of the week, enter the Day of Week criteria to report on.

### Screen Layout



### Sample Report

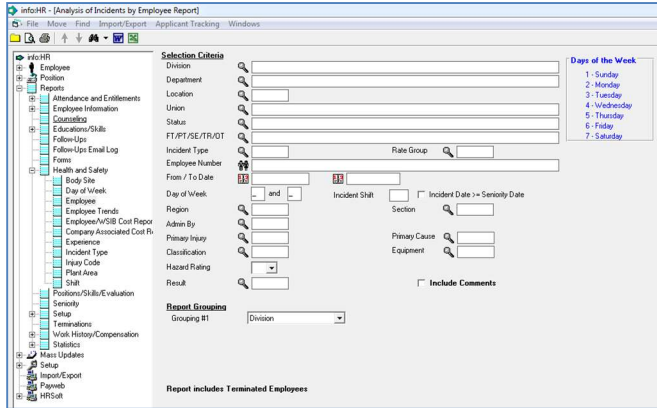
Time: 1:39:33 PM		Analysis of Incidents by Day of Week			RZINDOW
<b>Day of Week:</b>	Thursday	<b>% of all Incidents:</b>	29.17	<b>Number of Incidents:</b>	7
<b>From-To Date:</b>	04/29/1992 09/09/2011	<b>Total Number of Incidents:</b>	24		
<b>Type</b>	<b>Shift</b>	<b>Hour</b>	<b>Plant Area</b>	<b>Equipment ID</b>	
FIR S T AID	A	13:42	FABRICATION DEPT.	FABRICATION MACHINE 33	
	1	10:00			
	1	10:00	BATTLEFIELD	COMPUTER	
	1	13:00			
	1	10:00	DECAST	DECAST MACHINE	
	1	10:00			
MEDICAL AID	1	00:00			

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## Employee

This report details the Health & Safety Incidents that have occurred for the employee(s) selected based on the From / To Date entered. These dates refer to the Incident Date.

### Screen Layout



- To view comments associated with Incidents check the **Include Comments** box.

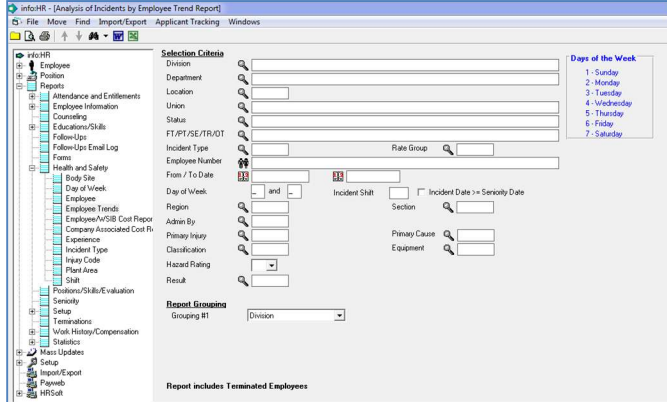
### Sample Report

Time: 8:48:52 PM		Analysis of Incidents by Employee		RZINEM P	
<b>Employee Name:</b> Abbott, John		<b>% of all Incidents:</b> 28.00		<b>Number of Incidents:</b> 7	
<b>From-To Date:</b> 29/04/1992 28/11/2011		<b>Total Number of Incidents:</b> 25			
<b>Type/Injury</b>	<b>Cause/Task</b>	<b>Shift</b>	<b>Body Sites</b>		
Overexertion BRUISE	INCORRECT PLACEMENT OF EQUIP. GOING TO \$TOREROOM	2	LEFT LEG		
Overexertion					
Overexertion BRUISE	WET FLOOR WALKING TO TOOLROOM	1	HAND		
Overexertion BRUISE	INCORRECT PLACEMENT OF EQUIP. Turning away from equipment.	A	HAND		
Overexertion		1			
Overexertion BRUISE	INCORRECT PLACEMENT OF EQUIP. Operating high decibel equipment		EAR		
Overexertion Mild General Ailment	re				

## Employee Trends

This report details the Incidents that have occurred to the employee(s) selected over a period of time based on the From / To Incident Dates entered.

### Screen Layout



- To view comments associated with Incidents check the **Include Comments** box.

### Sample Report

Time: 8:50:36 PM		Employee Trend Analysis Report		RZINET	
<b>Type of Injury:</b>		<b>% of all incidents</b>		<b>Number of Incidents</b>	
<b>From-To Date:</b> 29/04/1992 28/11/2011		56.00%		14	
		<b>Total Number of Incidents</b>			
		25			
<b>Employee</b>	<b>Cause/Task</b>	<b>Plant Area</b>	<b>Incident Date</b>		
Abbott, John			01/08/1996		
Abbott, John			01/06/1996		
Adams, Karen			01/01/1994		
Anderson, Dane			01/11/2006		
Armstrong, Bob		OFFICE	28/11/2011		
Browning, Janice			01/11/2006		
Drac, Jeri			01/08/1996		
Saunders, Carey			01/03/2006		
YOUNG, YOGI			10/08/1996		
YOUNG, YOGI			02/08/1996		

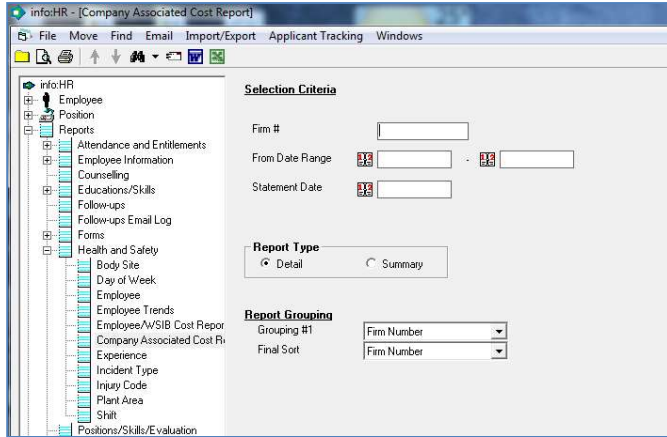




## Company Associated Cost Report

This report summarizes the costs for the Health & Safety Incidents that have occurred during the period of time based on the From / To Incident Dates entered.

### Screen Layout



### Sample Report - Detail

Time: 9:30:22 AM		Detail Company Associated Cost										RZCOMPSTD
State	Date	From / To Date	Cost 1	Cost 2	Cost 3	Cost 4	Cost 5	Cost 6	Cost 7	Cost 8	Cost 9	Cost 10
Firm Number	Mvtown											
5/1/2013	4/1/2013	4/30/2013	Doctor's Visi 1,500.00	Prescriptions 65.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

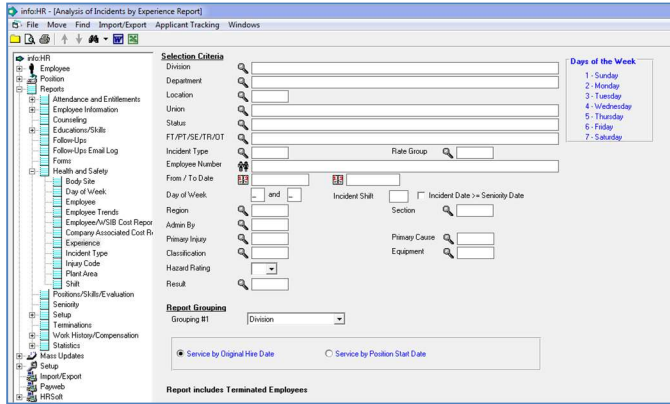
### Sample Report - Summary

Time: 9:32:19 AM		Summary Company Associated Cost										RZCOMPSTS
Firm Number	Cost Type 1	Cost Type 2	Cost Type 3	Cost Type 4	Cost Type 5	Cost Type 6	Cost Type 7	Cost Type 8	Cost Type 9	Cost Type 10		
Mvtown	Total: 1,500.00	65.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

## Experience

This report analyzes the Health & Safety Incidents that occurred for the employee(s) selected based on the From / To Incident Dates entered. Length of Service is based on either the Original Hire Date or Position Start Date.

## Screen Layout



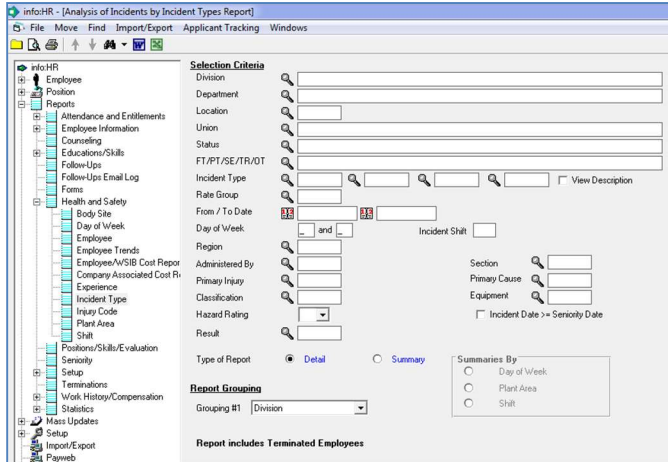
## Sample Report

Time: 8:57:43 PM		Analysis of Incidents by Employee Experience			RZINEXP
		Experience based on Original Date of Hire			
Length of Service	Type of Injury	Quantity	% of Length	% of Total	
	Abrasions, Cuts, Lacerations o	6	75.00	10.7	
	BRUISE	0	0.00	0.0	
	BRUISE	2	25.00	3.6	
12 - 24 MONTHS		3	37.50	5.4	
12 - 24 MONTHS	BRUISE	4	50.00	7.1	
12 - 24 MONTHS	Mild General Ailment	1	12.50	1.8	
GT 24 MONTHS		17	42.50	30.4	
GT 24 MONTHS	BRUISE	8	20.00	14.3	
GT 24 MONTHS	CUT	2	5.00	3.6	
GT 24 MONTHS	MASSIVE TRAUMA	6	15.00	10.7	
GT 24 MONTHS	Mild General Ailment	2	5.00	3.6	
GT 24 MONTHS	Sprain or Pulled Muscle	5	12.50	8.9	
<b>Total Number of Incidents:</b>		<b>56</b>			

## Incident Type

This report displays and summarizes the Health & Safety Incident Types based on the From / To Incident Dates entered.

### Screen Layout



- Select Detail to view an analysis report of all incidents in the system.
- Select **Summary** to view a summary report ordered by incident by **Day of Week, Plant Area or Shift**.

### Sample Report

Time: 8:59:27 PM		Analysis of Incidents by Incident Type				rzintype	
Incident Type:		% of Total Incidents:	0.00	Number of Incidents:	0		
From-To Date:	29/04/1992 28/11/2011	Total Number of Incidents:	25				
Injury	Body Site(s)	Plant Area	Equipment ID	Day of Week	Shift	Time	
Abrasions, Cuts, Laceratio	HAND			Wednesday			
Sprain or Pulled Muscle	HAND			Thursday			
Sprain or Pulled Muscle	HAND			Monday			
Sprain or Pulled Muscle	HAND			Friday			

### Sample Report – Summary - Day of Week

Time: 11:40:37 AM		Analysis of Incidents by Incident Type				RZINTPED	
		Summary by Day of Week					
Incident Type:	FIRST AID	% of Total Incidents:	52.00	Number of Incidents:	13		
From-To Date:	4/29/92 9/09/11	Total Number Incidents:	25				
	Day of Week	Quantity	% / Day of Week				
	Monday	1	7.69%				
	Saturday	1	7.69%				
	Sunday	2	15.38%				
	Thursday	6	46.15%				
	Tuesday	1	7.69%				
	Wednesday	2	15.38%				

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## Sample Report – Summary – Plant Area

Time: 11:44:43 AM		Analysis of Incidents by Incident Type Summary by Plant Area		RZINTPE A
Incident Type:	FIRST AID	% of Total Incidents:	52.00	Number of Incidents: 13
From-To Date:	4/29/92 9/09/11	Total Number Incidents:	25	
	<b>Plant Area</b>	<b>Quantity</b>	<b>% in Plant Area</b>	
	BASEBALL FIELD	7	53.85%	
	BATTLEFIELD	1	7.69%	
	DIECAST	1	7.69%	
	DIECAST	2	15.38%	
	FABRICATION DEPT.	2	15.38%	

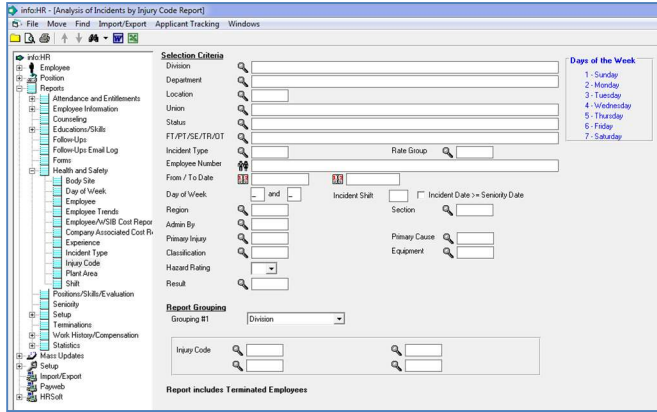
## Sample Report – Summary – Shift

Time: 11:45:48 AM		Analysis of Incidents by Incident Type Summary by Shift		RZINTPE S
Incident Type:	FIRST AID	% of Total Incidents:	52.00	Number of Incidents: 13
From-To Date:	4/29/92 9/09/11	Total Number Incidents:	25	
	<b>Shift</b>	<b>Quantity</b>	<b>% by Shift</b>	
		5	38.46%	
	0	1	7.69%	
	1	6	46.15%	
	A	1	7.69%	

## Injury Code

This report displays and summarizes the Health & Safety Injury Codes based on the From / To Incident Dates entered.

### Screen Layout



- Enter up to four **Injury Codes** for generating Injury code - specific reports.

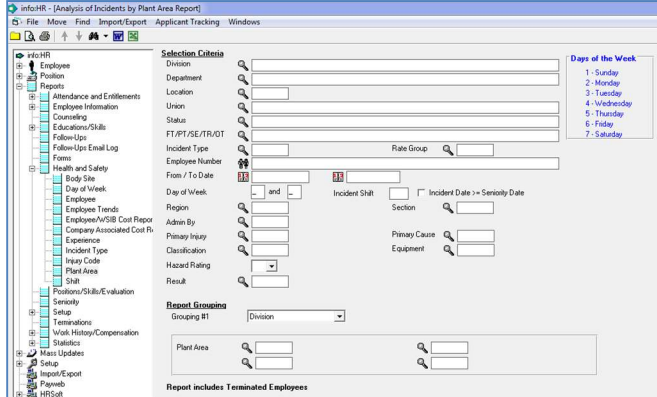
### Sample Report

Time: 11:48:37 AM		Analysis of Incidents by Injury Code			RZINCODE
<b>Injury:</b>			<b>% of all incidents:</b>	41.67%	<b>Number of Incidents:</b> 10
<b>From-To-Date:</b>	4/29/92 9/09/11		<b>Total Number of Incidents:</b>	24	
<b>Type</b>	<b>Class'n</b>	<b>Cause/Task</b>	<b>Body Sites</b>	<b>Equipment ID</b>	
FA	Fatality				
FA	FIRST AID				
FA	MEDICAL AID				
MA	Fatality				
MA	MEDICAL AID				
MA	SEVERE				
OVEX	Gradually Occurring Over	Too much walking	Lower Back		

## Plant Area

This report displays and summarizes the Health & Safety Incidents based on the From / To Incident Dates entered.

### Screen Layout



- Enter up to four **Plant Area** codes for generating Plant Area - specific reports.

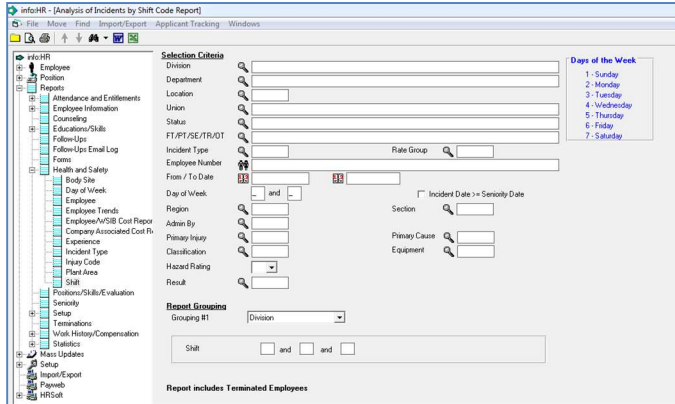
### Sample Report

Time: 9:02:54 PM		Analysis of Incidents by Plant Area			RZINAREA	
<b>Plant Area</b>		<b>% of all Incidents</b>	0.00%	<b>Incidents in Plant Area</b>	0	
<b>From-To-Date:</b>	29/04/1992 28/11/2011	<b>Total Number of Incidents</b>	25			
<b>Incident Type</b>	<b>Injury</b>	<b>Equipment ID</b>		<b>Day of Week</b>	<b>Shift</b>	<b>Time</b>
				Saturday		13:34
				Saturday		12:00
				Thursday	1	10:00
	BRUISE			Wednesday	2	00:00
	BRUISE			Thursday	1	00:00
	BRUISE			Sunday		10:00
	Mild General Ailment			Thursday		

## Shift

This report displays and summarizes the Health & Safety Incidents based on the From / To Incident Dates entered.

### Screen Layout



- Enter up to three Shift codes for generating Shift -specific reports.

### Sample Report

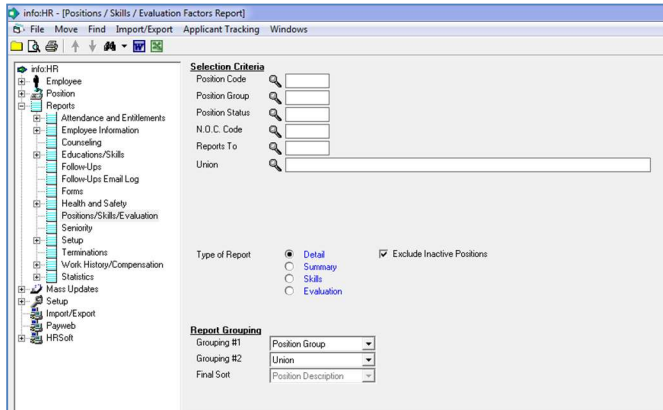
Time: 9:04:07 PM		Analysis of Incidents by Shift			RZINSHFT
<b>Shift:</b>		<b>% of all incidents:</b>	64.00%	<b>Number of Incidents:</b>	16
<b>From-To-Date:</b>	29/04/1992 28/11/2011	<b>Total Number of Incidents:</b>	25		
Incident Type	Time	Plant Area	Equipment ID	Day of Week	
				Wednesday	
				Thursday	
				Monday	
				Wednesday	
				Friday	
Overexertion				Thursday	
	08:56			Wednesday	
	10:00		FABRICATION MACHINE 3321	Saturday	
	10:00			Sunday	
	10:00	BATTLEFIELD	COMPUTER	Saturday	
	10:00			Thursday	
	10:00			Friday	
	10:00	BATTLEFIELD	COMPUTER	Saturday	
	10:00			Thursday	
	10:00	OFFICE		Friday	
	11:00			Sunday	
	12:00			Saturday	
	13:00			Friday	
	13:00			Friday	
Repetition	13:00	OFFICE	PHOTOCOPIER	Friday	
Struck/Caught	09:30	OFFICE		Monday	

## Position/Skills/Evaluation

This report profiles the Grid Steps, Evaluation Factors, Position Fill/Vacancy, full-time equivalency information and Skills required for the Positions selected.

Choose the Reports To option to report on all jobs that report to the Position Code entered.

### Screen Layout



The report can be printed in detail or summary. A detail report is one page per position.

- Click the **Skills** option to print only the Position Skills report. When this option is selected you may select Skill codes to be viewed.
- Click the **Evaluation** option to print only the Evaluation Factors report. When this option is selected you may select Evaluation codes to be viewed.

To exclude inactive positions (Status Code = "INAC"), check the **Exclude Inactive Positions**.

### Sample Report - Detail

Position		Grid Steps	A/H	Group	Points	
C/O	Chief Information Officer	01:	111,375.00	A	ADMN Administration	0.00
		02:	141,750.00			
		03:	162,000.00	Status	MGMT Management	
		04:	0.00	Reports To:		
		05:	0.00			
		06:	0.00	N.O.C.:	0001 Officials and Managers	
		07:	0.00			
		08:	0.00	Union		
		09:	0.00			
		10:	0.00	# of Available Positions:	1 FTE Hours/Year:	
		11:	0.00	# of Filled Positions:	2 Total FTE Hrs/Yr.: 0.00	
DEV	Developer	01:	75,000.00	A	ADMN Administration	575.00
		02:	80,000.00			
		03:	85,000.00	Status	FT	
		04:	90,000.00	Reports To:		
		05:	95,000.00			
		06:	100,000.00	N.O.C.:	0003 Technicians	
		07:	0.00			
		08:	0.00	Union		
		09:	0.00			
		10:	0.00	# of Available Positions:	1 FTE Hours/Year:	
		11:	0.00	# of Filled Positions:	1 Total FTE Hrs/Yr.: 1,350.00	
HS	Health & Safety Coordinator	01:	0.00	A	ADMN Administration	0.00
		02:	0.00			
		03:	0.00	Status	ACTI	
		04:	0.00	Reports To:	HRMGR Director, Human Resources	
		05:	0.00			
		06:	0.00	N.O.C.:		
		07:	0.00			
		08:	0.00	Union		
		09:	0.00			



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## Sample Report – Summary

Position		Status	Group	Union	Total Points	Positions Avail. / Filled	Number of FTE Avail. / Filled	FTE Hours/Year Avail. / Filled
CIO	Chief Information Officer	MGMT	ADMN		0.00	1.00 / 2.00	0.00	0.00 / 0.00
DEV	Developer	FT	ADMN		575.00	1.00	0.75	0.00 / 1,350.00
HS	Health & Safety Coordinator	ACTI	ADMN		0.00	1.00 / 1.00	0.00	0.00 / 0.00
MISD	MIS Director	ACTI	ADMN		0.00	1.00 / 1.00	0.00	0.00 / 0.00
RECE	Receptionist	ACTI	ADMN		125.00	3.00 / 3.00	0.00	0.00 / 0.00
SMGR	Sales Manager	ACTI	MGMT		0.00	1.00 / 1.00	0.00	0.00 / 0.00
WRM	Western Regional Manager	MGMT	MGMT		0.00	1.00 / 0.00	0.00	0.00 / 0.00
ABC	Accounting Manager	MGMT	CUST	NON	0.00	1.00 / 0.00	0.00	0.00 / 0.00
APCL	AP Clerk	ACTI	ADMN	NON	0.00	2.00 / 0.00	0.00	0.00 / 0.00
ARCL	AR Clerk	ACTI	ADMN	NON	1,701.00	1.00	1.00	0.00 / 1,950.00
BP	Benefits & Pension Admin	FT	MGMT	NON	58.00	2.00	1.50	0.00 / 3,000.00
HRMGR	Director, Human Resources	MGMT	MGMT	NON	600.00	1.00 / 1.00	0.00	0.00 / 0.00
HRCLK	HR Clerk	ACTI	ADMN	NON	0.00	1.00 / 1.00	1.00	0.00 / 2,040.00
PROG	Programmer	FT	ADMN	NON	0.00	5.00 / 2.00	0.20	0.00 / 0.00
				Total Positions Available:	18	Total # of FTEs Available:	2.50	
				Total Positions Filled:	16	Total of FTEs Filled:	1.95	
				Total Positions Printed:	14			

## Sample Report – Skills

Position Code	Description	Status	Group	Reports To	Union	Skill	Experience Factor	Comments
DEV	Developer	FT	ADMN				9999	
DEV	Developer	FT	ADMN			Computer (General)	4	
DEV	Developer	FT	ADMN			Computer (General)	1111	this is a test
MISD	MIS Director	ACTI	ADMN			Chartered Accounting	0	
RECE	Receptionist	ACTI	ADMN	SMGR		Computer (General)	0	
RECE	Receptionist	ACTI	ADMN	SMGR		Receptionist	500	NONE REQUIRED
ARCL	AR Clerk	ACTI	ADMN	ABC	NON	Chartered Accounting	9999	THE LAZY BROWN DOG
ARCL	AR Clerk	ACTI	ADMN	ABC	NON	Chartered Accounting	0	
ARCL	AR Clerk	ACTI	ADMN	ABC	NON	Chartered Accounting	0	
ARCL	AR Clerk	ACTI	ADMN	ABC	NON	Chartered Accounting	0	
ARCL	AR Clerk	ACTI	ADMN	ABC	NON	Chartered Accounting	0	
ARCL	AR Clerk	ACTI	ADMN	ABC	NON	Computer (General)	0	
ARCL	AR Clerk	ACTI	ADMN	ABC	NON	Computer (General)	0	
HRCLK	HR Clerk	ACTI	ADMN	HRMGR	NON	Chartered Accounting	0	
PROG	Programmer	FT	ADMN		NON	Chartered Accounting	0	
PROG	Programmer	FT	ADMN		NON	Computer (General)	1	
PROG	Programmer	FT	ADMN		NON	Computer (General)	0	

## Sample Report - Evaluation

Position Code	Description	Status	Group	Union	Evaluation Factor	Level	Sub-L. Level	Weight	Points	Total
DEV	Developer	FT	ADMN		Difficulty				100.00	575.00
DEV	Developer	FT	ADMN		Difficulty				67.00	
DEV	Developer	FT	ADMN		Difficulty				125.00	
DEV	Developer	FT	ADMN		Environment Factor				200.00	
DEV	Developer	FT	ADMN		Environment Factor				83.00	
RECE	Receptionist	ACTI	ADMN		Difficulty			5.00	125.00	125.00
ARCL	AR Clerk	ACTI	ADMN	NON	Difficulty			55.00	1,201.00	1,701.00
ARCL	AR Clerk	ACTI	ADMN	NON	Difficulty			3.87	200.00	
ARCL	AR Clerk	ACTI	ADMN	NON	Environment Factor			4.00	300.00	
BP	Benefits & Pension Admin	FT	MGMT	NON	Difficulty				25.00	58.00
BP	Benefits & Pension Admin	FT	MGMT	NON	Environment Factor				33.00	
HRMGR	Director, Human Resources	MGMT	MGMT	NON	Difficulty			5.00	500.00	600.00
HRMGR	Director, Human Resources	MGMT	MGMT	NON	Environment Factor			1.00	100.00	
<b>Grand Total:</b>									<b>3,069.00</b>	

## Seniority

The purpose of this report to display the Years of Experience (seniority) for all employees within the organization or a specific group of employees based on a selection criteria entered.

### Screen Layout

- The user can base the Seniority on Original Hire Date, Seniority Date, Last Hire Date, Union Date, Seniority Hours, or User Defined Date by using the **Seniority Based On** drop down.
  - If the **Seniority Hours** option is chosen, the application sums all attendance records where the Seniority flag is set to **Y**.
- A Seniority Report based on Seniority hours provides additional options in the selection criteria. They are:

- If **Include Attendance History** is checked, the application uses both the Attendance Master and Attendance History to calculate Seniority Hours.
- If you want to know how many seniority hours an employee accumulated between their Original Date of Hire and a specific date, enter the **As of Date**.
- To print a report totalling seniority hours between a given months, use the **Seniority Months From/To** option. Months must be entered in numerical format. For example: 1 equals January and 12 equals December.

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## Sample Report – Original Hire Date

Time: 9:07:10 PM		Seniority Report by Original Hire Date as of April 09, 2013			RZSEND02	
Union	Number	Name	Position	Original Hire Date	Years of Experience	
NON-UNION	1053	Manglebe, Jayne	HR CLERK	01/01/1982	31.29	
NON-UNION	1012	King, Deborah	DIRECTOR, HUMAN RESOURCES	25/05/1985	27.89	
NON-UNION	1013	Brown, Thomas	FINANCE & ADMIN. MANAGER	30/06/1988	24.79	
CAW LOCAL #101	1014	Anderson, Dane	HR CLERK	08/03/1989	24.10	
NON-UNION	2210	Drac, Jeri	SALES MANAGER	15/01/1990	23.25	
STAFF ASSN	1027	Saunders, Carey	SALES REPRESENTATIVE	15/09/1990	22.58	
CUPE LOCAL 105	10231	Sampson, Harry	SALES REPRESENTATIVE	01/12/1990	22.37	
NON-UNION	221026	Abbott, John	President	02/01/1992	21.28	
CUPE LOCAL 105	5001	Haile, William	RECEPTIONIST	30/06/1992	20.79	
CUPE LOCAL 105	5000	Haile, Jenny	TELESALES REPRESENTATIVE	01/06/1993	19.87	
NON-UNION	5984	Sarte, Mary-Ellen	BRANCH MANAGER	01/06/1994	18.87	
STEEL WORKERS ASSOCI	1054	Harper, Betsy	Office Administrator	23/07/1994	18.73	
NON-UNION	1050	Armstrong, Bob	DIRECTOR, HUMAN RESOURCES	03/10/1994	18.53	
CUPE LOCAL 105	1051	Adams, Karen	HR CLERK	01/02/2000	13.19	
CUPE LOCAL 105	1051	Adams, Karen	ACCOUNTS PAYABLE CLERK	01/02/2000	13.19	
CUPE LOCAL 105	1051	Adams, Karen	ACCOUNTS RECEIVABLE CLERK	01/02/2000	13.19	
NON-UNION	1052	Mansfield, Katherine	HR CLERK	28/07/2009	3.70	
Total Number of Employees -			15			
Average Years of Experience -			19.86			

## Sample Report – Seniority Date

Time: 7:03:50 PM		Seniority Report by Seniority Date as of May 16, 2013			RZSENSE2	
Union	Number	Name	Position	Seniority Date	Years of Exper.	
Non Union	1051	Adams, Karen	Benefits & Pension Admin	2/01/85	28.30	
Non Union	1013	Brown, Thomas	Director, Human Resources	6/30/88	24.89	
Non Union	11026	Abbott, John	Chief Information Officer	3/15/89	24.19	
Non Union	1251	Sampson, Harry	Receptionist	12/01/90	22.47	
	5506	Smith, Jane	Developer	1/01/91	22.39	
	1052	O'Brian, RONALD	ME Director	6/01/91	21.97	
Non Union	5001	Haile, William	Receptionist	5/22/93	20.00	
Non Union	5000	Haile, Jenny	Programmer	6/01/93	19.97	
Company Association	1050	Armstrong-Smith, Grant	Chief Information Officer	10/02/94	18.63	
Non Union	1021	Selby, Murray	AR Clerk	1/01/95	18.38	
Non Union	1025	Davis, Celia	HR Clerk	5/01/06	7.05	
Non Union	1012	King, Debra	Benefits & Pension Admin	12/01/10	2.46	
Non Union	5545	Darkey, Pat	Sales Manager	7/30/11	1.80	
Total Number of Employees -			13			
Average years of experience -			17.88			

## Sample Report - Last Hire Date

Time: 7:05:38 PM		Seniority Report by Last Hire Date as of May 16, 2013			RZSENL52	
Union	Number	Name	Position	Last Hire Date	Years of Exper.	
	1052	O'Brian, RONALD	ME Director	1/31/13	0.29	
Total Number of Employees -			1			
Average years of experience -			0.29			

## Sample Report – Union Date

Time: 7:08:37 PM		Seniority Report by Union Date as of May 16, 2013			RZSEUN1	
Union	Number	Name	Position	Union Date	Years of Exper.	
Company Association	1050	Armstrong-Smith, Grant	Chief Information Officer	10/02/95	17.6	
Company Association	2435	Abel, Samantha	Health & Safety Coordinator	6/15/05	7.9	

# info:HR Reports User Manual

## Sample Report - Seniority Hours

Time: 7:12:16 PM		Seniority Report by Hours as of May 16, 2013			RZSE.NHR2	
Union	Number	Name	Position	Original Hire Date	Total Hours	Length of Service
Non Union	1052	O'Brian, RONALD	ME Director	06/01/1991	265.00	21.97
Company Association	1021	Selby, Murray	AR Clerk	01/01/1995	123.00	18.38
	1050	Armstrong-Smith, Grant	Chief Information Officer	10/02/1994	65.00	18.63
	5506	Smith, Jane	Developer	01/01/1991	24.00	22.39
Non Union	11026	Abbott, John	Chief Information Officer	03/15/1989	8.00	24.19
Non Union	1012	King, Debra	Benefits & Pension Admin	12/01/2010	0.00	2.46
Non Union	1013	Brown, Thomas	Director, Human Resources	06/30/1988	0.00	24.89
Non Union	1025	Davis, Celia	HR Clerk	05/01/2006	0.00	7.05
Non Union	1051	Adams, Karen	Benefits & Pension Admin	02/01/1985	0.00	28.30
Non Union	5000	Haile, Jenny	Programmer	06/01/1993	0.00	19.97
Non Union	5001	Haile, William	Receptionist	05/22/1993	0.00	20.00
	8324	Wassler, Johnatan	Programmer	05/30/2011	0.00	1.96
Non Union	5545	Darksey, Pat	Sales Manager	07/30/2011	0.00	1.80
Non Union	1231	Sampson, Harry	Receptionist	12/01/1990	0.00	22.47
Non Union	7863	Adams, Jennifer	Receptionist	09/12/2012	0.00	0.67
Company Association	2435	Abel, Samantha	Health & Safety Coordinator	06/15/2005	0.00	7.92
Total Number of Employees -			16			

## Sample Report – First Day

Time: 7:16:30 PM		Seniority Report by First Day as of May 16, 2013			RZSENLHN	
Union	Number	Name	Position	First Day	Years of Experience	
	1052	O'Brian, RONALD	ME Director	6/01/91	21.97	
	5545	Darksey, Pat	Sales Manager	7/30/11	1.80	
Total Number of Employees -			2			
Average Years of Experience -			11.88			

## Sample Report – User Defined Date

Time: 7:17:45 PM		Seniority Report by User Defined Date as of May 16, 2013			RZSENUM2		
Department	Division	Union	Number	Name	Position	User Defined Date	Years of Exper.
SALE	2000	NON	1051	Adams, Karen	Benefits & Pension Admin	2/01/85	28.3
ACCT	2000	NON	1013	Brown, Thomas	Director, Human Resources	6/30/88	24.9
2000	LA	NON	11026	Abbott, John	Chief Information Officer	2/15/89	24.3
SALE	2000	NON	1231	Sampson, Harry	Receptionist	1/15/91	22.3
ACCT	2000	ASSN	1050	Armstrong-Smith, Grant	Chief Information Officer	10/02/94	18.6
SALE	LA	NON	5000	Haile, Jenny	Programmer	5/01/97	16.1
ACCT	1000	NON	5001	Haile, William	Receptionist	5/01/99	14.1
ACCT	2000	NON	1021	Selby, Murray	AR Clerk	4/03/01	12.1
2000	1000	NON	1012	King, Debra	Benefits & Pension Admin	12/01/10	2.5
SALE	PWN	NON	5545	Darksey, Pat	Sales Manager	7/30/11	1.8
Total Number of Employees -			10				
Average years of experience -			16.5				

## Setup

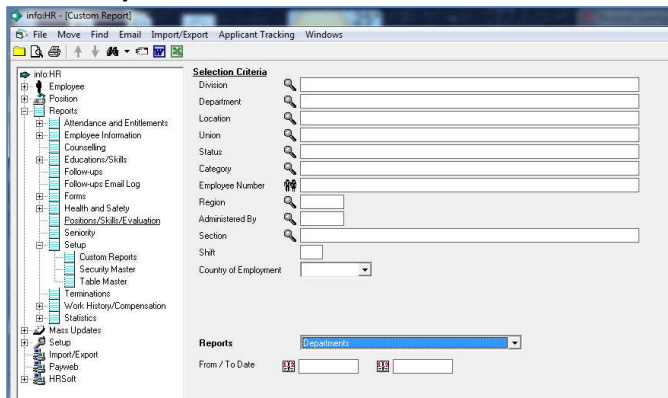
This section of the reports menu is designed to produce reports based on information stored in the Setup section of info:HR. Below are the reports included in this section:



## Custom Reports

This option is use if the user has built ad-hoc reports using Crystal Reports Version 8.0 only. Higher versions of Crystal will not run using this option. Ad hoc reports are identified under the SETUP menu item and have individual security assigned to them under the Security Master. For more information, please refer to the Setup User Manual.

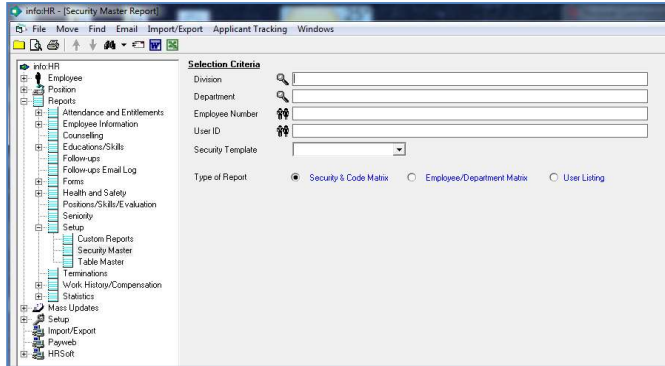
## Screen Layout



## Security Master

The purpose of this report is to view security access and templates to info:HR, Codes, Employees, and Departments.

### Screen Layout



- To view a report for a **Security Template** select it from the drop down.
- Select **Security & Code Matrix** if you require a report of what screens and codes the selected user has access to.
- Select **Employee/Departments Matrix** if you require a report listing the Employees and Departments selected users have access to.
- Select **User Listing** to produce a report of all users in the system.

### Sample Report – Security & Code Matrix

Time: 12:55:39 PM		Security Master Listing		RZSECURITY
<b>User Name:</b> King, Deborah	<b>User ID:</b> 1012	<b>Employee Number:</b> 1012		
<b>Template:</b>	<b>Employee # Based Security:</b> NO			
<b>Security Group:</b> Applicant Tracking				
<b>Function</b>				<b>Accessible</b>
Applicant Associations Inquire				Yes
Applicant Associations Maintain				Yes
Applicant Continuing Education Inquire				Yes
Applicant Continuing Education Maintain				Yes

### Sample Report – Department Matrix

Time: 12:58:46 PM		Department Security Listing					RZSECUS1	
User ID/Name	Template	Department	Union	Division	Section	Administered By	Include Empl. #	Exclude Empl. #
Employee Employee template	TEMPLATE	ALL						
KELLY1 KELLY1	TEMPLATE	ALL						
Manager Manager template	TEMPLATE	ALL						
reports Report access only	TEMPLATE	ALL						
99999999 System Administrator	TEMPLATE	ALL						

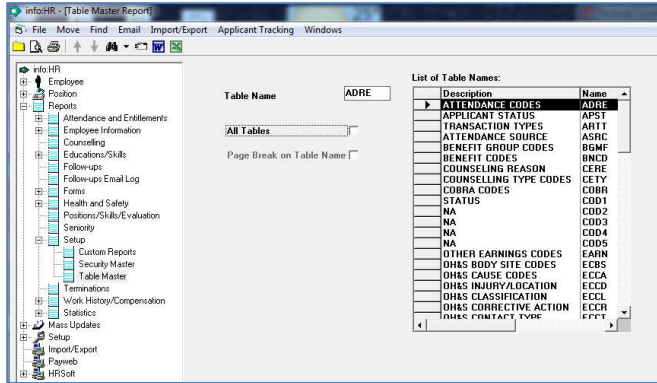
### Sample Reports – User Listing

Time: 12:57:59 PM		User Listing by Template			RZSECTMPL1
User ID	User Name	Employee #	Security Template	Timesheet Template	
reports	Report access only			Punch in out	
Employee	Employee template		TEMPLATE	Punch in out	
KELLY1	KELLY1		TEMPLATE	Punch in out	
Manager	Manager template		TEMPLATE	Punch in out	
99999999	System Administrator		TEMPLATE	Punch in out	
tEST123	tEST123		TEMPLATE		
221028	Abbott, John	221028	Manager	Punch in out	
3011	Abel, Alex	221028	tEST123	Hourly	

## Table Master

Choose this option to generate a list of the Codes set up in the system. Select the type of Codes you wish to report on from the List of Table Names. Click on the All Tables box to generate the report for all Codes within the system. Click on the Page Break on Table Name box to produce a report with page breaks after each Table Name.

## Screen Layout



## Sample Report

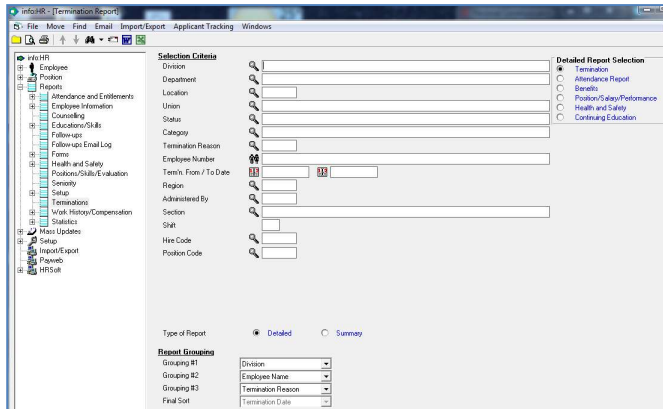
Table	Table Name	Code	Description	Incentive
ADRE	ATTENDANCE CODES	BT	Bereavement	YES
		OTBF	BRING FORWARD COMP HOURS	YES
		BFHR	BRING FORWARD SENIORITY HOURS	YES
		W+	Comp Earned	
		W-	Comp Taken	
		COUR	Course	
		CTF	CT Forfeited Hours	
		D	Days	
		ERA	ERA	
		FLEX	Flex	
		FLTD	Float Day	
		JR	Jerry	
		LOA	Leave of Absence	
		OT15	Lieu Banked @ 1.5	YES
		OT	Lieu Earned	
		CT	Lieu Taken	
		OV	Paid Overtime	
		PT	Personal Time	
		PT+	PT Stat Earned	
		PT-	PT Stat Taken	
		REG	Regular	
		REG2	Regular Contract Hours	



## Terminations

The purpose of this report is to produce information on Terminated Employees.

### Screen Layout



- When **Detailed** is selected you are able to select a specific section of the employee profile to view from the legend at the top right of the screen.
  - **Termination** – provides Demographic, Banking Position/Salary and Performance Data.
  - **Attendance Report** – provides a detailed list of attendance entered for the employee summed by reason code.
  - **Benefits** – provides a detailed list of benefits and costs associated for the employee.
  - **Position/Salary/Performance Report** – Provides a chronological list of Positions held by the employee, including Salary and Performance ratings.
  - **Health and Safety** – Provides a detailed list of all health and safety records for the employee.
  - **Continuing Education** – Provides a detailed list of courses and costs for the employee.
- When **Summary** is selected you are able to select specific sections of the employee profile to view from the legend at the top right of the screen. You are able to show salary by checking the check box.
  - **Termination Report** – provides basic information on position dates, years of service, reason for termination, division, status, salary and hours per week for employees selected.
  - **Attendance Report** – provides a summary by code for Attendance records.
  - **Benefits** – provides a summary of Benefits for the employee.
  - **Health and Safety Total Cost** - This report is for future use.



## Sample Report – Detailed – Termination

Time: 8:35:16 AM		Terminated Employee Master Report		RZTRMMST	
<b>Basic Employee Information</b>					
Employee:	2210	Ms. Jones, Jenny	Payroll ID:		
Division:	LA	Department:	SALE	Sales	
Location:			G/L#:		
Section:			Unit:	21	
Address:	50 South Service Road Oxnard, CA 90132		Country:	U.S.A.	
Badge ID:	2210				
Middle Name:					
Alias:					
Home Telephone:	(407) 872-2541		Gender:	F	
Alternate Phone #:	(416) 277-8788		Marital Status:	M	
Cellular Telephone:			Date of Birth:	2/15/63	
Pager Number:			Smoker:	No	
S.S.N.:	999-999-999		S.I.N.:		
Original Hire Date:	1/15/90	Seniority Date:	1/15/90	Eligibility:	
Union Date:		OMERS:		Earliest Retirement:	
Last Hire Date:		User Defined Date:	1/15/90	Normal Retirement:	
First Day:		Last Day:		Latest Retirement:	
<b>Banking Data</b>					
Deposit Bank:	Branch:	Account Number:	Amt. Deposit:	% Deposit:	
			0.00	0.00	
			0.00	0.00	
			0.00	0.00	
TD1 Amount:	\$7412.00	TD 1 Code:	0	Supervisor Code:	
Extra Tax:	\$25.00	Vacation %:	0.12%	Pension Code:	
UTC Code:		CPP Code:		Province of Employment:	
				CA	

## Sample Report – Detailed Attendance Report

Time: 8:38:39 AM		Attendance Report for Terminated Employees		RZTRMAD	
Attendance Reason	Date	Hours	Days		
Employee: Jones, Jenny	Termination Date: 4/21/11	Termination Reason: Resigned			
Course	3/25/92	8.00	1.00		
	2/11/93	7.50	0.94		
	3/10/96	4.00	0.50		
	6/15/96	8.00	1.00		
	6/15/96	8.00	1.00		
	7/01/96	10.00	1.25		
<b>Totals by Attendance Reason:</b>		<b>45.50</b>	<b>5.69</b>		
Float Day	4/01/92	8.50	1.06		
	5/01/92	8.00	1.00		
	4/01/93	8.50	1.06		
	5/01/93	8.00	1.00		
<b>Totals by Attendance Reason:</b>		<b>33.00</b>	<b>4.13</b>		
Lieu Earned	7/02/96	8.00	1.00		
<b>Totals by Attendance Reason:</b>		<b>8.00</b>	<b>1.00</b>		
Lieu Taken	7/03/96	1.00	0.13		
<b>Totals by Attendance Reason:</b>		<b>1.00</b>	<b>0.13</b>		
PT Stat Earned	1/01/10	0.00	0.00		
	9/16/10	2.80	0.35		
<b>Totals by Attendance Reason:</b>		<b>2.80</b>	<b>0.35</b>		
PT Stat Taken	9/24/10	1.00	0.13		
<b>Totals by Attendance Reason:</b>		<b>1.00</b>	<b>0.13</b>		
Statutory Holiday	1/01/96	8.00	1.00		

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## Sample Report – Detailed Benefits

Time: 8:40:46 AM		Detailed Benefit Listing for Terminated Employees							RZTRMBND	
2210		Employee Name		Benefit	Cvg	Date	E ffective Amount	Percent Paid Empl. Comp.	Cost of Benefit	Per/Pren
Jones, Jenny		401k Contribution	1/15/90	0.00	0.00%	1.00%	0.00	Total: 0.00	A	0.00
								Empl.: 0.00		
		Dental	F 4/15/90	0.00	0.00%	1.00%	0.00	Total: 875.00	A	0.00
								Empl.: 0.00		
								Comp.: 875.00		
		Extended Health Care	F 4/15/90	0.00	0.00%	1.00%	0.00	Total: 2,200.00	A	0.00
								Empl.: 0.00		
								Comp.: 2,200.00		
		LTD	7/15/90	2,334.50	0.00%	1.00%	0.00	Total: 966.00	P	100.00
								Empl.: 0.00		
								Comp.: 966.00		
		Extended Health Care	4/15/90	0.00	0.00%	1.00%	0.00	Total: 250.00	A	0.00
								Empl.: 0.00		
								Comp.: 250.00		
		Life	9/14/09	204,000.00	0.20%	0.80%	0.00	Total: 208.00	P	0.00
								Empl.: 42.00		
								Comp.: 166.00		
		<b>Benefit Cost:</b>	<b>Employee:</b>	<b>42.00</b>	<b>Company:</b>	<b>4,458.00</b>	<b>Total:</b>	<b>4,500.00</b>		
		<b>Totals</b>	<b>Employee:</b>	<b>\$42.00</b>	<b>Company:</b>	<b>\$4,458.00</b>	<b>Total:</b>	<b>\$4,500.00</b>		
		<b>Grand Totals:</b>	<b>Employee:</b>	<b>\$42.00</b>	<b>Company:</b>	<b>\$4,458.00</b>	<b>Total:</b>	<b>\$4,500.00</b>		

## Sample Report – Detailed Position/Salary/Performance

Time: 8:42:19 AM		Terminated Employee Position/Salary/Performance Report				RZTRMPOS
Name of Employee:	Jones, Jenny	Empl #	2210	Date of Termination:	4/21/11	
<b>POSITION DATA</b>		<b>SALARY DATA</b>		<b>PERFORMANCE DATA</b>		
Position:	Sales Manager	Effective Date:	1/01/00	Reports To:		
Start Date:	1/15/90	Salary/Grade Code:	44,601.73 11 A	Performance Rating:	GOOD Good	
Reports To:		Compa:	116.58	Date Reviewed:	6/30/96	
Reason for Change:	NEWH	Reason:	Cost of Living Adjustment	Next Review:	6/30/98	
FTE	Per Yr.:	% Change:	1.24%	Comments:		
		Effective Date:	1/15/90	Reports To:		
		Salary/Grade Code:	38,200.00 10 A	Performance Rating:	GOOD Good	
		Compa:	99.85	Date Reviewed:	6/30/96	
		Reason:	New Hire	Next Review:	6/30/98	
		% Change:	100.00%	Comments:		
		Effective Date:	3/15/94	Reports To:		
		Salary/Grade Code:	39,995.00 10 A	Performance Rating:	GOOD Good	
		Compa:	104.54	Date Reviewed:	6/30/96	
		Reason:	Merit	Next Review:	6/30/98	
		% Change:	4.69%	Comments:		

## Sample Report – Detailed Health and Safety

Time: 8:46:26 AM		Analysis of Terminated Employees Incidents by Incident Type				RZTRMINI
Incident Type:	FIRST AID	% of Total Incidents:	100.00	Number of Incidents:	1	
From-To Dates:	8/01/96 8/01/96	Total Number of Incidents:	1			
Injury	Body Site	Plant Area	Equipment ID	Day of Week	Shift Time	
No Injury Code				Thursday	1 10:00	

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## Sample Report – Detailed Continuing Education

Time: 8:48:43 AM		Terminated Employee Continuing Education Report				RZTRMEDU1
Jones , Jenny						
Employee # / Name	Course Type	Course Code	Date Completed	Total	Course Hours	
2210 Jones , Jenny	Health & Safety	CPR	7/14/09	\$0.00	8.00	
Totals For - Jones , Jenny				\$0.00		
Totals for - Jones , Jenny				\$0.00		
Grand Totals -				\$0.00		

## Sample Report – Summary Termination Report

Time: 8:54:48 AM		Terminated Employee Summary Report				RZTRMSU1				
Employee # / Name	Position	Original Hire Date	Date of Termination	Years of Service	Reason for Termination	Division	Status	Actual Salary	Hrs Per Week	Annualized Salary
2210 Jones , Jenny	Western Regional Manager	1/15/90	4/21/11	21.28	Resigned	West Coast Branch	A	\$1,249.00	40.00	\$1,249.00
2210 JONES ,JENNY	HR Clerk		10/01/99		Resigned	Eastern US Branch	ACTB	14.36 H	40.00	29,861.94
Total Number of Employees Terminated is			2	Average years of service	21.28	Total # of Terminations	2			

## Sample Report – Summary Attendance

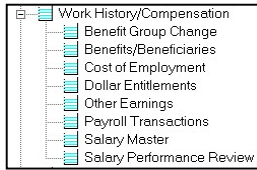
Time: 8:58:45 AM		Attendance Report for Terminated Employees				RZTRMAT1
Attendance Reason		Termination Date	4/21/11	Hours	Days	
Employee	Jones , Jenny			Termination Reason	Resigned	
Course				45.50	5.69	
Float Day				33.00	4.13	
Lieu Earned				8.00	1.00	
Lieu Taken				1.00	0.13	
PT Stat Earned				2.80	0.35	
PT Stat Taken				1.00	0.13	
Statutory Holiday				112.00	14.00	
Vacation				42.00	5.25	
Totals for Jones , Jenny				245.30	30.66	

## Sample Report – Summary Benefits

Time: 9:00:30 AM		Summarized Benefit Listing for Terminated Employees				RZTRMBE1
Employee Nbr/Name	Benefit	Cvg	Effective Amount Date	Percent Paid Empl. Comp.	Employee Company	Cost of Benefit Total
2210 Jones , Jenny	401k Contribution		0.00 1/15/90	0.00 100.00	\$0.00	\$0.00
	Dental	F	0.00 4/15/90	0.00 100.00	\$0.00	\$875.00
	Extended Health Care	F	0.00 4/15/90	0.00 100.00	\$0.00	\$2,200.00
	Extended Health Care		0.00 4/15/90	0.00 100.00	\$0.00	\$250.00
	Life		204,000.00 8/14/09	20.00 80.00	\$41.62	\$166.46
	LTD		2,334.50 7/15/90	0.00 100.00	\$0.00	\$966.48
Grand Totals -					\$41.62	\$4,499.56

## Work History/Compensation

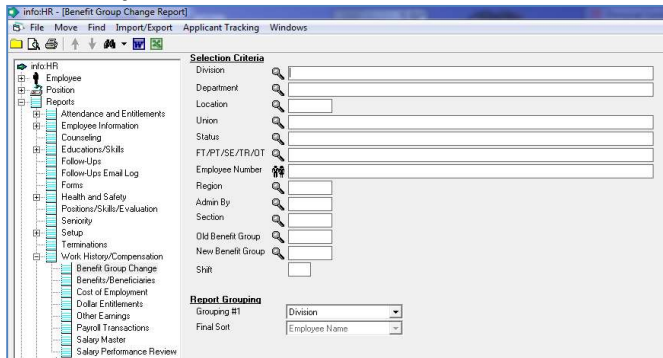
Below are the reports included in this section:



## Benefit Group Change

This report shows employees who have changed from one benefit group to another.

### Screen Layout



### Sample Report

Employee Number/Name	SIN	Old Benefit Group	New Benefit Group	New Benefits	Coverage	Effective Date
221026 Abbott, John	999-999-999	Staff	Management	LIFE INSURANCE		20/04/2006
				EXTENDED HEALTH C	F	20/04/2006
				LONG TERM DISABILI		20/04/2006
				DEPENDENTS GROUP L		13/04/2006
				DENTAL	F	20/02/2006
1014 Anderson, Dane	999-999-999	Staff		EXTENDED HEALTH C		08/03/1989
				OPTICAL CARE BENEFI		08/03/1989
				DENTAL		08/03/1989
				LONG TERM DISABILI		08/06/1989
1050 Armstrong, Bob	999-999-999	Management	Staff	EXTENDED HEALTH C	F	03/01/1995
				LIFE INSURANCE		03/01/1995
				DEPENDENTS GROUP L		13/04/2006
				DENTAL	F	03/01/1995
				LONG TERM DISABILI		03/01/1995
5001 Haile, William	999-999-999	Staff		DENTAL	F	01/01/1999
				LONG TERM DISABILI		01/09/1996
				EXTENDED HEALTH C	F	01/09/1996
				LIFE INSURANCE		01/09/1996

## Benefits/Beneficiaries

This report details the Benefits information for each employee selected with the cost associated to each benefit.

### Screen Layout

- Use the **Benefit Code** option to specify a particular Benefit or a group of Benefits.
- Use the **Coverage Type** option to enter S (single) F (family) etc. to select a particular coverage type.
- Use the **From/To Date** option to report on benefits for specified employees within a given time period. This date is based on the Effective Date on the employee's Benefit record.
- To exclude or include **Birth Date** or **Ended Benefits** check the boxes.
- **Show Dollars** in Monthly or Annual costs.
- This report can be run **Detailed**, **Summary** or showing **Beneficiary** data only.

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## Sample Report – Detailed

Time: 12:28:48 PM		Detailed Benefit Master Report							RZBFTDTM	
Division Central Branch										
Employee Name	Waiting Period	Benefit	Cvg	Effective Date	Amount	Percent Paid Empl. Comp.	Cost of Benefit (Monthly)		Prem. End Date	
Adams , Karen	0	401k Contribution		2/01/85	0.00	0.00 100.00	Total:	0.0000	A	
							Empl.:	0.0000		
							Comp.:	0.0000		
Adams , Karen	3	Dental	F	5/01/85	0.00	0.00 100.00	Total:	72.9200	A	
							Empl.:	0.0000		
							Comp.:	72.9200		
Adams , Karen	3	Extended Health Care	F	5/01/85	0.00	0.00 100.00	Total:	183.3300	A	
							Empl.:	0.0000		
							Comp.:	183.3300		
Adams , Karen	3	Extended Health Care		5/01/85	0.00	0.00 100.00	Total:	20.8300	A	
							Empl.:	0.0000		
							Comp.:	20.8300		
Adams , Karen		Life		9/14/09	174,000.00	0.00 100.00	Total:	15.9500	P	1,000.00
							Empl.:	0.0000		
							Comp.:	15.9500		
Adams , Karen	6	LTD		8/01/85	3,514.00	100.00 0.00	Total:	85.3902	P	100.00
							Empl.:	85.3902		
							Comp.:	0.0000		

## Sample Report - Summary

Time: 12:30:26 PM		Summarized Benefit Master Report							RZBENFTM	
Division Central Branch										
Employee Name	Benefit	Cvg	Amount	Effective Date	Percent Paid Empl. Comp.	Cost of Benefit (Monthly)		Total	End Date	
Adams , Karen	401k Contribution		0.00	2/01/85	0.00 100.00	0.0000	0.0000	0.0000	0.0000	
Adams , Karen	Dental	F	0.00	5/01/85	0.00 100.00	0.0000	72.9200	72.9200	72.9200	
Adams , Karen	Extended Health Care	F	0.00	5/01/85	0.00 100.00	0.0000	183.3300	183.3300	183.3300	
Adams , Karen	Extended Health Care		0.00	5/01/85	0.00 100.00	0.0000	20.8300	20.8300	20.8300	
Adams , Karen	Life		174,000.00	9/14/09	0.00 100.00	0.0000	15.9500	15.9500	15.9500	
Adams , Karen	LTD		3,514.00	8/01/85	100.00 0.00	85.3902	0.0000	85.3902	85.3902	
Adams , Karen	SemiPrivate	S	0.00	5/01/85	100.00 0.00	0.0000	0.0000	0.0000	0.0000	
Totals : Adams , Karen							Benefit	Taxes	Total	
							Employee:	85.3902	85.3902	
							Company:	0.0000	283.0300	
							Total:	378.4200	0.0000	378.4202

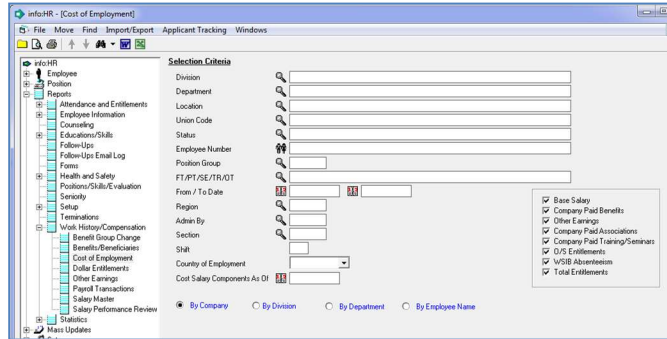
## Sample Report – Beneficiary

Time: 12:31:50 PM		Beneficiary Master Report				RZBNFTOB	
Division Central Branch							
Employee Name	Benefit	Beneficiary Name	Relationship	Percent	Birth Date		
Armstrong-Smith , Grant	Life	Colmo, Armstrong	Son	50.00	10/04/96		
	Life	Ms Linda Rowland	Aunt	50.00	4/10/55		

## Cost of Employment

This report produces a one-page summary of the costs of employing the employees or groups of employees selected. Costs are grouped into categories and each category of costs is analyzed as a percent of the total cost.

### Screen Layout



- Use the **Company, Division, Department** or **Employee Name** option to generate a one-page summary of the investment in human resources selected criteria.
- Enter the **From/To** to control the costs that show up in Group B of the report. If looking at an annual cost of employment, you want to make sure that only the Associations and Continuing Education costs that were incurred that year are included. Leaving this blank will cause the application to sum the cost of all courses and associated unrelated to when the cost was incurred.
- To exclude certain costs, uncheck the items you wish excluded.

# info:HR Reports User Manual

## Sample Report – By Company

Time: 9:27:22 PM		Cost of Employment by Company			rzcost1
Group	Item	Annualized Dollars	% of Group	% of Total	
A	Base Salary	\$1,043,586.02	98.25%	72.35%	
	Company Paid Benefits	\$14,327.61	1.35%	0.99%	
	Other Earnings	\$4,302.50	0.41%	0.30%	
<b>Total of Group "A"</b>		<b>\$1,062,216.13</b>		<b>73.64 %</b>	
B	Company Paid Associations	\$3,400.00	18.72%	0.24%	
	Company Paid Training/Seminars	\$14,764.00	81.28%	1.02%	
	<b>Total of Group "B"</b>	<b>\$18,164.00</b>		<b>1.26 %</b>	
C	O/S Entitlements: Vacation	\$192,337.26	53.14%	13.33%	
	Sick Time	\$49,366.86	13.64%	3.42%	
	Hourly Entitlements	\$115,854.92	32.01%	8.03%	
	Compensatory Hours	\$1,365.40	0.38%	0.09%	
	Dollar Entitlements	\$2,430.00	0.67%	0.17%	
	WSIB Absenteeism	\$623.04	0.17%	0.04%	
	<b>Total of Group "C"</b>	<b>\$361,977.48</b>		<b>25.10 %</b>	
<b>Total of Groups "A", "B" &amp; "C"</b>		<b>\$1,442,357.61</b>			
D	Total Entitlements: Previous Year Vacation	\$117,013.02	27.78%		
	Current Year Vacation	\$115,530.80	27.43%		
	Previous Year Sick Time	\$25,250.26	5.99%		
	Current Year Sick Time	\$30,505.06	7.24%		
	Hourly Entitlements	\$117,294.82	27.84%		
	Dollar Entitlements	\$15,650.00	3.72%		
	<b>Total of Group "D"</b>	<b>\$421,243.96</b>			

## Sample Report - By Division

Time: 12:38:09 PM		Cost of Employment by Division			rzcost2
<b>Division: West Coast Branch</b>					
Group	Item	Annualized Dollars	% of Group	% of Total	
A	Base Salary	\$237,417.60	84.92%	79.24%	
	Company Paid Benefits	\$42,165.96	15.08%	14.07%	
	Other Earnings	\$0.00	0.00%	0.00%	
<b>Total of Group "A"</b>		<b>\$279,583.56</b>		<b>93.32 %</b>	
B	Company Paid Associations	\$500.00	35.36%	0.17%	
	Company Paid Training/Seminars	\$914.00	64.64%	0.31%	
	<b>Total of Group "B"</b>	<b>\$1,414.00</b>		<b>0.47 %</b>	
C	O/S Entitlements: Vacation	\$3,377.12	18.15%	1.13%	
	Sick Time	\$12,709.84	68.29%	4.24%	
	Hourly Entitlements	\$0.00	0.00%	0.00%	
	Compensatory Hours	\$2,523.86	13.56%	0.84%	
	Dollar Entitlements	\$0.00	0.00%	0.00%	
	WSIB Absenteeism	\$0.00	0.00%	0.00%	
	<b>Total of Group "C"</b>	<b>\$18,610.82</b>		<b>6.21 %</b>	
<b>Total of Groups "A", "B" &amp; "C"</b>		<b>\$299,608.38</b>			
D	Total Entitlements: Previous Year Vacation	\$4,508.08	15.18%		
	Current Year Vacation	\$2,253.36	7.59%		
	Previous Year Sick Time	\$5,777.20	19.45%		
	Current Year Sick Time	\$6,932.64	23.34%		
	Hourly Entitlements	\$10,235.49	34.46%		
	Dollar Entitlements	\$0.00	0.00%		
	<b>Total of Group "D"</b>	<b>\$29,706.77</b>			
<b>Total of Groups "A", "B" &amp; "D"</b>		<b>310,704.33</b>			



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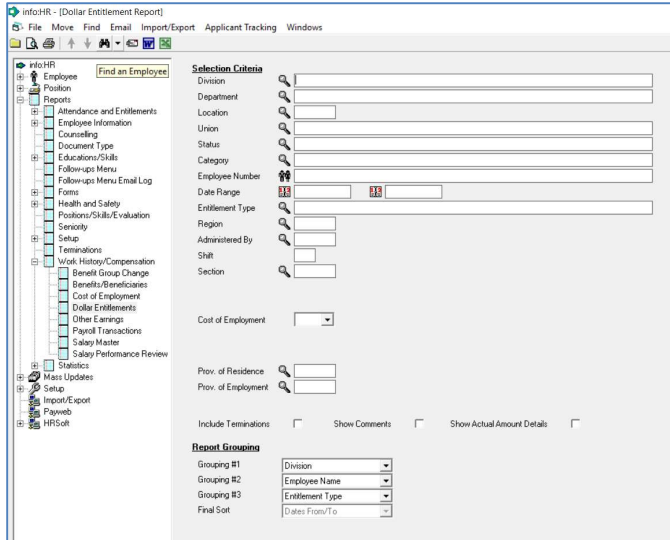
## Sample Report - By Employee Name

Date: 5/17/13		HR Systems Strategies		Page: 1	
Time: 12:41:51 PM		Cost of Employment by Employee		rzcost4	
Employee: Abbott, John				Number: 11026	
Group	Item	Annualized Dollars	% of Group	% of Total	
A	Base Salary	\$110,000.00	82.43%	78.31%	
	Company Paid Benefits	\$23,445.96	17.57%	16.69%	
	Other Earnings	\$0.00	0.00%	0.00%	
	<b>Total of Group "A"</b>		<b>\$133,445.96</b>		<b>95.00%</b>
B	Company Paid Associations	\$500.00	35.36%	0.36%	
	Company Paid Training/Seminars	\$914.00	64.64%	0.65%	
	<b>Total of Group "B"</b>		<b>\$1,414.00</b>		<b>1.01%</b>
C	O/S Entitlements: Vacation	\$-1,269.12	-22.64%	-0.90%	
	Sick Time	\$4,653.44	83.02%	3.31%	
	Hourly Entitlements	\$0.00	0.00%	0.00%	
	Compensatory Hours	\$2,220.96	39.62%	1.58%	
	Dollar Entitlements	\$0.00	0.00%	0.00%	
	WSIB Absenteeism	\$0.00	0.00%	0.00%	
	<b>Total of Group "C"</b>		<b>\$5,605.28</b>		<b>3.99%</b>
<b>Total of Groups "A", "B" &amp; "C"</b>		<b>\$140,465.24</b>			
D	Total Entitlements: Previous Year Vacation	\$846.08	6.08%		
	Current Year Vacation	\$1,269.12	9.13%		
	Previous Year Sick Time	\$2,115.20	15.21%		
	Current Year Sick Time	\$2,538.24	18.25%		
	Hourly Entitlements	\$7,138.80	51.33%		
	Dollar Entitlements	\$0.00	0.00%		
	<b>Total of Group "D"</b>		<b>\$13,907.44</b>		
<b>Total of Groups "A", "B" &amp; "D"</b>		<b>\$148,767.40</b>			

## Dollar Entitlements

This report details the Dollar Entitlements for the options selected. This report will also show what the employee has utilized and the variance between the full entitlement and what has been used by each employee selected.

### Screen Layout



- Select Y or N to show **Cost of Employment** or leave blank to show both.
- **Include Terminated** will include terminate employees.
- **Include Comments** will show comments associated with Entitlements.

### Sample Report

Time: 9:29:26 PM		Dollar Entitlement Report							RZDOLN1	
Employee Nbr/Name	Entitlement	Date Range	Entitlement	Actual	Variance	COE	Reference N	Paid To	Date Paid	
5984	Saite, Mary-Ellen	Health promotion	Date Totals: 1,500.00 01/01/2010 - 31/12/2010 500.00	1,245.00	255.00	Yes				
1027	Saunders, Carey	EQUIPMENT	Date Totals: 200.00 01/01/2004 - 31/12/2004 200.00			Yes				
1027	Saunders, Carey	Health promotion	Date Totals: 500.00 01/01/2010 - 31/12/2010 500.00			Yes				
<b>Grand Totals:</b>			<b>16,525.00</b>	<b>5,420.00</b>	<b>1,030.00</b>					

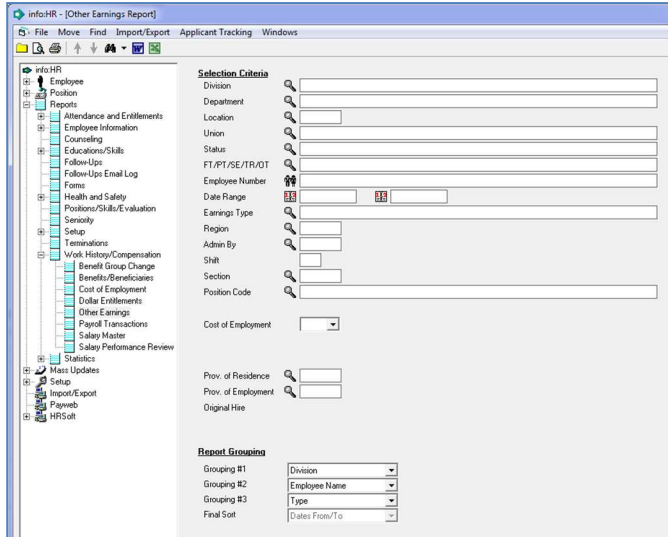
### Sample Report – Show Actual Amount Details

Time: 1:53:36 PM		Dollar Entitlement Report							RZDOLN1	
Employee Nbr/Name	Entitlement	Date Range	Entitlement	Actual	Variance	COE	Reference No	Paid To	Date Paid	
1050	Armstrong, Bob	AWARD'S	1/01/04 - 12/31/04 2,500.00	2,500.00	0.00	Yes	123-456	Employee	1/30/04	
1050	Armstrong, Bob	Club membership	1/01/08 - 12/31/08 1,000.00	800.00	200.00	Yes	112233	Don Valley GC	4/04/08	
1050	Armstrong, Bob	EQUIPMENT	1/01/06 - 12/31/06 200.00	0.00	200.00	Yes				
1050	Armstrong, Bob	EXPENSE ALLOWANCE	1/01/06 - 12/31/06 200.00	0.00	200.00	Yes				
1050	Armstrong, Bob	Health promotion	1/01/12 - 12/31/12 0.00	100.00	-100.00	Yes			8/12/12	
1050	Armstrong, Bob	Health promotion	1/01/12 - 12/31/12 0.00	200.00	-200.00	Yes			8/01/12	
1050	Armstrong, Bob	Health promotion	1/01/10 - 12/31/10 500.00	0.00	500.00	Yes				
1050	Armstrong, Bob	Training	1/01/08 - 12/31/08 400.00	450.00	-50.00	Yes	1234	Employee	11/27/08	
<b>Employee Totals:</b>			<b>4,800.00</b>	<b>4,050.00</b>	<b>750.00</b>					

## Other Earnings

The purpose of this report is to list Other Earnings information. This will show the date range and the Actual Earnings with Comments.

### Screen Layout



- **Cost of Employment:**
  - Select Y to only print Other Earnings record that have their COE Flag = "Y".
  - Select N to only print Other Earnings record that have their COE Flag = "N".
  - Leave blank to show all records.

### Sample Report

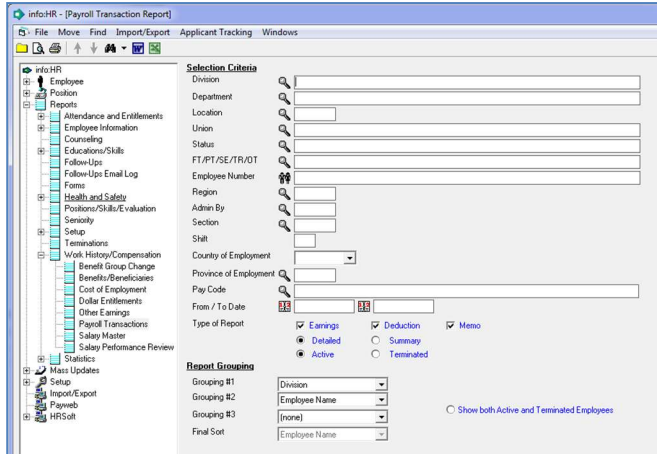
Time: 9:32:23 PM		Other Earnings Report				RZOEARN1
Employee Number/Name	Earnings Type	Date Range		Actual Dollars	COE	Comments
221026	Abbott, John	Bonus	01/01/2013	31/01/2013	0.00	N
221026	Abbott, John	CAR ALLOWANCE	01/01/2006	31/12/2006	10.00	N
1051	Adams, Karen	BEREAVEMENT EARNINGS	01/01/2006	31/12/2006	0.00	N
1051	Adams, Karen	Bonus	01/01/2013	31/01/2013	0.00	N
1051	Adams, Karen	CAR ALLOWANCE	01/01/2006	31/12/2006	0.00	N
1014	Anderson, Dane	Bonus	01/01/2013	31/01/2013	0.00	N
1050	Armstrong, Bob	Bonus	01/01/2013	31/01/2013	0.00	N
1050	Armstrong, Bob	Bonus	25/05/2009	25/05/2009	500.00	Y
1050	Armstrong, Bob	RECOGNITION AWARD	01/06/2006	01/06/2006	2,500.00	Y
1013	Brown, Thomas	Bonus	01/01/2013	31/01/2013	0.00	N
1053	Mangieba, Jayne	CAR ALLOWANCE	01/01/2006	31/12/2006	0.00	N
5984	Sartre, Mary-Ellen	CAR ALLOWANCE	01/01/2000	31/12/2000	1,250.00	Y
5984	Sartre, Mary-Ellen	OVER TIME * 1.5	01/01/1995	31/12/1995	52.50	Y
<b>Selection Totals -</b>				<b>4,312.50</b>		

# info:HR Reports User Manual

## Payroll Transactions

The purpose of this report is to view payroll transactions that were imported from a payroll system. Transactions include earnings, deductions and memo types (ADP only).

### Screen Layout



- To view the **Earnings, Deductions** or **Memos** use the check boxes to select each.
- This report can be viewed in **Summary** or **Detailed** format.
- You may also select **Active** or **Terminated** employees.

### Sample Reports - Detailed

Time: 9:34:12 PM		Payroll Transaction Detail Report				RZPayTran
Employee Number/Name	From Date	To Date	Payroll Transaction	Earning/Deduction Indicator	Amount	Actual
221026 Abbott, John	04/01/2010	17/01/2010	Gross pay	E	\$2,000.00	
<b>Abbott, John</b>			<b>Totals Amount:</b>	<b>Earnings</b>	<b>\$ 2,000.00</b>	<b>Deduction \$ 0.00</b>
						<b>Memo \$ 0.00</b>
1050 Armstrong, Bob	04/01/2010	17/01/2010	CPP	D	\$50.00	
1050 Armstrong, Bob	04/01/2010	17/01/2010	EI	D	\$40.00	
1050 Armstrong, Bob	04/01/2010	17/01/2010	Federal tax	D	\$440.00	
1050 Armstrong, Bob	04/01/2010	17/01/2010	Gross pay	E	\$1,825.00	
1050 Armstrong, Bob	04/01/2010	17/01/2010	Net pay	M	\$1,195.00	
1050 Armstrong, Bob	04/01/2010	17/01/2010	Provincial tax	D	\$100.00	
<b>Armstrong, Bob</b>			<b>Totals Amount:</b>	<b>Earnings</b>	<b>\$ 1,825.00</b>	<b>Deduction \$ 630.00</b>
						<b>Memo \$ 1,195.00</b>
			<b>Totals Actual:</b>	<b>Earnings</b>	<b>\$ 0.00</b>	<b>Deduction \$ 0.00</b>
						<b>Memo \$ 0.00</b>
<b>Grand Total</b>	<b>Employees 2</b>	<b>Totals Amount:</b>	<b>Earnings</b>	<b>\$ 3,825.00</b>	<b>Deduction \$ 630.00</b>	<b>Memo \$ 1,195.00</b>
		<b>Totals Actual:</b>	<b>Earnings</b>	<b>\$ 0.00</b>	<b>Deduction \$ 0.00</b>	<b>Memo \$ 0.00</b>

### Sample Report – Summary

Time: 7:35:20 AM		Payroll Transaction Summary Report			RZPayTrans
Employee Number/Name	Payroll Transaction	Indicator	Amount	Actual	
	401k Contribution	D	\$400.00		
	Health and Dental Insurance	D	\$125.00		
	Income Tax	D	\$1,152.00		
	Overtime (straight time)	E	\$550.00		
	Regular Earnings	E	\$4,000.00		
	Vacation	E	\$200.00		
<b>Totals Amount:</b>		<b>Earnings</b>	<b>\$ 6,550.00</b>	<b>Deduction \$ 1,677.00</b>	
				<b>\$ 0.00</b>	
<b>Totals Actual:</b>		<b>Earnings</b>	<b>\$ 0.00</b>	<b>Deduction \$ 0.00</b>	
				<b>\$ 0.00</b>	

## Salary Master

This report details the Salary and Position History for the employee(s) selected.

### Screen Layout

The screenshot shows the 'info:HR - Salary Master Report' application window. The interface includes a menu bar (File, Move, Find, Import/Export, Applicant Tracking, Windows) and a left-hand navigation tree with categories like Employee, Position, Reports, and various HR functions. The main area is titled 'Selection Criteria' and contains numerous search fields and options for filtering the report. Fields include Division, Department, Location, Union, Status, FT/PT/SE/TR/OT, Employee Number, Position Code, Position Group, Region, Country of Employment, Admin By, Section, Supervisor Code, Vades Field 1, Status From / To Date, Prov. of Residence, Prov. of Employment, and Type of Report (Current, History, As of Date). There are also radio buttons for 'Salary' and 'Position', and a checkbox for 'Acting Positions'. A 'Report Grouping' section at the bottom allows for selecting Grouping #1 (Division), Grouping #2 (Department), and Final Sort (Employee Name).

- The report contains the standard selection items pertinent to the Position and Salary masters of the employee records. They can be used to:
  - Print current salary information or historical information.
  - Print current position information or historical information.
  - Print salary information as of a given date.
- If **Acting Position** is checked, the report will only display records that have an Acting Position checked in their current position record.

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## Sample Report – Current Salary

Current Salary Summary Report						RZSALSUM
Employee Nbr./Name	Position	Position Start Date	Salary Information	Effective	Next Review Date	Performance
11026 Abbott, John	Chief Information Officer	2/01/00	110,000.00 A 01	4/01/11		
1025 Davis, Celia	HR Clerk	5/01/06	12.00 H 03	1/31/12		
1012 King, Debra	Benefits & Pension Admin	5/18/11	51,307.02 A 00	2/01/13		9/01/10
8524 Wassler, Johnaton	Programmer	5/30/11	63,000.00 A 02	6/01/12		
Total for Cal Regional Office			249,267.02	Annualized Dollars	Average	37.53 Per Hour

## Sample Report – Current Position

Current Position Summary Report										RZPOSSUM
Employee Nbr./Name	Position	Position Start Date	Rept. Authority	Day	Week	Pay Period	Nbr.	Hrs/Yr	Shift	Reason
11026 Abbott, John	Chief Information Officer	2/01/00	Abbott, John	8.00	40.00	80.00			1	Promotion
1025 Davis, Celia	HR Clerk	5/01/06	Abbott, John	8.00	40.00	80.00	1.00	2,040.00	1	New Hire
1012 King, Debra	Benefits & Pension Admin	5/18/11		8.00	40.00	80.00				Demotion
8524 Wassler, Johnaton	Programmer	5/30/11		4.00	20.00	40.00	0.20		1	New Hire

## Sample Report – Salary History

Detailed Salary History Report								RZSALHIS
Employee Nbr./Name	Position	Position Start Date	Salary Information	Grade	Effective	Reason(s) for Salary Change	Next Review	Cur Y
11026 Abbott, John	Chief Information Officer	2/01/00	110,000.00 A 01		4/01/11	Salary Review		Y
	Chief Information Officer	2/01/00	105,000.00 A 01		1/01/11	Annual Increase		N
	Chief Information Officer	2/01/00	89,963.36 A 00		1/01/10	Annual Increase		N
	Chief Information Officer	2/01/00	85,679.39 A 00		1/01/09	Annual Increase	1/01/10	N
	Chief Information Officer	2/01/00	83,999.40 A 01		5/22/07	Merit		N
	Chief Information Officer	2/01/00				Annual Increase		N
	Chief Information Officer	2/01/00	81,552.82 A 01		2/21/07	Salary Review		N

## Sample Report - Position History

Detailed Position History Report										RZPOSHIS
Employee Nbr./Name	Position	Pos. Start Date	Rept. Authority	Day	Week	Pay Period	Nbr.	Hrs/Yr	Shift	Reason
11026 Abbott, John	Chief Information Officer	2/01/00	Abbott, John	8.00	40.00	80.00			1	Promotion
	MB Director	5/21/95	Amstrong-Smith, Grant	8.00	40.00	80.00				Promotion
	Programmer	9/15/90		8.00	40.00	80.00				Promotion
	Developer	3/15/89		8.00	40.00	80.00				New Hire
1025 Davis, Celia										

## Sample Report – As of Date Salary

Salary Summary Report						RZSALASH
As of Date = 5/20/13						
Employee Nbr./Name	Position	Position Start Date	Salary Information	Effective	Next Review Date	
11026 Abbott, John	Chief Information Officer	2/01/00	110,000.00 A 01	4/01/11		
1025 Davis, Celia	HR Clerk	5/01/06	12.00 H 03	1/31/12		
1012 King, Debra	Benefits & Pension Admin	5/18/11	51,307.02 A 00	2/01/13		
8524 Wassler, Johnaton	Programmer	5/30/11	63,000.00 A 02	6/01/12		
Total for Cal Regional Office			249,267.02	Annualized Dollars	Average	37.53 Per Hour

## Sample Report – As of Date Position

Position Summary Report										RZPOSASH
As of Date = 5/20/13										
Employee Nbr./Name	Position	Position Start Date	Rept. Authority	Day	Week	Pay Period	Nbr.	Hrs/Yr	Shift	Reason
11026 Abbott, John	Chief Information Officer	2/01/00	Abbott, John	8.00	40.00	80.00			1	Promotion
1025 Davis, Celia	HR Clerk	5/01/06	Abbott, John	8.00	40.00	80.00	1.00	2,040.00	1	New Hire
1012 King, Debra	Benefits & Pension Admin	5/18/11		8.00	40.00	80.00				Demotion

## Salary Performance Review

The purpose of this report is to view Salary/Performance Review details for employees.

### Screen Layout

- The buttons on the top right-hand corner of the report determines which date is checked when entering the **From/To Date** on the selection criteria.

Next Salary Review Date  
 Next Performance Review Date  
 Performance Review Date

- **Type of Report:**
  - **Detailed** produces a form to record the results of salary and/or performance reviews. The detailed report prints a cover sheet that can be attached to an internal performance review form.
  - **Summary** produces a list of employees whose date falls within the **From/To Date Range** entered in the selection criteria. The top right-hand box is the determining factor as to which date is being checked.
- If **Include Salary History** is checked, additional options appear:

Include Salary History       Acting Position  
 Show All Employees       Hide Salary  
 Show Comments  
 Show Position Description

- Shows all salary history for the group of employees printed. If Salary Comments are wanted on the report, check **Show Comments**.
- If **Acting Position** is checked, the report will only display records that have an Acting Position checked in their current position record.
- If **Hide Salary** is checked no salary information will appear on the report.

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## Sample Report – Detailed

Time: 8:53:50 AM		Salary & Performance Review Report				RZSALPDT	
<b>Employee Nbr./Name</b>	11026 Abbott, John	<b>Position</b>	Chief Information Officer	<b>Start Date</b>	2/01/00	<b>Salary Information</b>	110,000.00 A 01 4/01/11
<b>Division:</b>	West Coast Branch		<b>Department:</b>	Cal Regional Office			
<b>Employment Status:</b>	A	<b>FT</b>	FT	<b>Union:</b>	NON		
<b>Original Hire Date:</b>	3/15/89	<b>Employee Type:</b>	1	<b>Seniority Date:</b>	3/15/89		
<b>Next Salary Review:</b>	<b>Next Performance Review:</b>						
<b>Position Information</b>	<b>Group Code:</b>	ADMIN	<b>Total Points:</b>	3	<b>FTE:</b>		
	<b>Status:</b>	MGMT	<b>Nbr of Positions:</b>	1	<b>FTE Hrs/Yr:</b>	<b>Mid-Point:</b>	3
<b>Grid Steps -</b>	<b>01:</b>	111,375.00	<b>05:</b>	0.00	<b>09:</b>	0.00	
	<b>02:</b>	141,750.00	<b>06:</b>	0.00	<b>10:</b>	0.00	
	<b>03:</b>	162,000.00	<b>07:</b>	0.00	<b>11:</b>	0.00	
	<b>04:</b>	0.00	<b>08:</b>	0.00			
<b>Complete the Information Below</b>	<b>This Employee Reports To</b> John Abbott						
<b>Position Data -</b>	<b>New Position Code:</b>	_____		<b>New Start Date:</b>	_____		
	<b>New Reports To:</b>	_____					
	<b>Reason For Position Change:</b>	_____					
	<b>Hours Per - Day:</b>	_____	<b>Weeks:</b>	_____	<b>Pay Period:</b>	_____	<b>Shift:</b> _____

## Sample Report - Summary

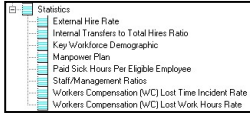
Time: 9:38:25 PM		Salary & Performance Review Summary Report				RZSLPRF	
Employee Nbr./Name	Position	Salary	Performance Review Date	Next Review Dates		Last Performance Rating	
				Salary	Performance		
221026	Abbott, John	96,140.00 A	2/01/2006			01/08/2009	
1051	Adams, Karen	100,000.00 A	01/12/1994			01/12/1995 GOOD PERFORMANCE	
1014	Anderson, Dane	41,497.11 A	14/12/1993			14/12/1994 GOOD PERFORMANCE	
1050	Armstrong, Bob	81,000.00 A	02/03/2012			01/03/2013 GOOD PERFORMANCE	
1013	Brown, Thomas	40,272.54 A					
2210	Drac, Jeri	43,200.00 A	30/06/1996			30/06/1998 GOOD PERFORMANCE	
5000	Haile, Jenny	28.00 H					
5001	Haile, William	26,818.00 A				13/12/2011	
1054	Harper, Babay	15.00 H					
1012	King, Deborah	100,000.00 A	01/01/1996			01/01/1997 GOOD PERFORMANCE	
1052	Mansfield, Katherine	31,372.00 A					
1053	Mangabe, Jayne	20,240.00 A					
10231	Sampson, Harry	35,101.90 A	28/09/1999			29/09/1999	
5984	Sarte, Mary-Ellen	47,424.47 A	22/03/1999			15/06/2000 GOOD PERFORMANCE	
1027	Saunders, Carey	91,080.00 A					



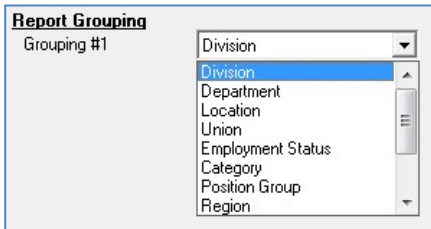
## Statistics

This section of reports provides statistical information based on the Selection Criteria entered. Some reports require Codes to be entered into the selection criteria to produce the reports.

Below are the reports included in this section:



Report Grouping is very important in this section. When a Report Grouping #1 is selected the report will give a summary statistic for the selection for that grouping. For example, if the Report Grouping #1 is set to Division the report will show totals for each Division and an Organization Summary at the bottom of the report.



### Sample Report – Report Grouping Division

<b>Division</b>	<b>PWN Test</b>						
	Total Number of Employee:	1	5.56%	Total for Gender	Male:	1	100.00%
					Female:	0	0.00%
<b>Division</b>	<b>West Coast Branch</b>						
	Total Number of Employee:	3	16.67%	Total for Gender	Male:	2	66.67%
					Female:	1	33.33%
<b>Grand Total Number of Employee:</b>		<b>18</b>		<b>Total For Gender</b>	<b>Male:</b>	<b>10</b>	<b>55.56%</b>
					<b>Female:</b>	<b>8</b>	<b>44.44%</b>

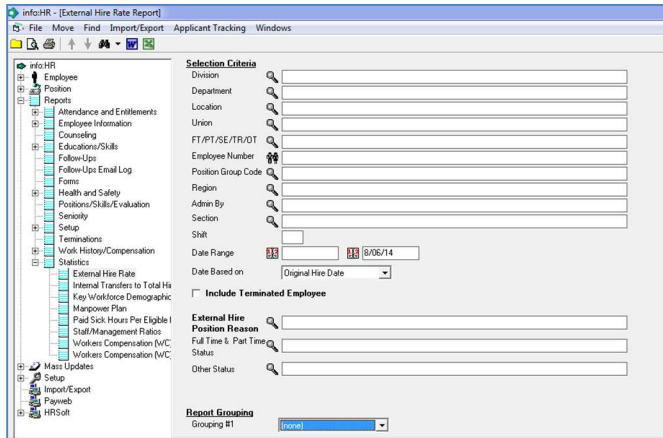
For the purpose of this section all report samples will be with a Report Grouping equal to None.

## External Hire Rate

The purpose of this report is to gain statistical information on employees hired from outside the organization. For example: Organization A and B are part of a larger organization with the parent Organization being C. If Organization A hires an employee from B then this would be considered an External Hire. But from Organization C's point of view it would be counted as an internal transfer.

External Hire Rate = Total External Hires/Average Employee Count

## Screen Layout



- This report is viewed by **External Hire Position Reason** Codes or **Employment Status** codes. A code must be entered in these selection criteria.

## Sample Report

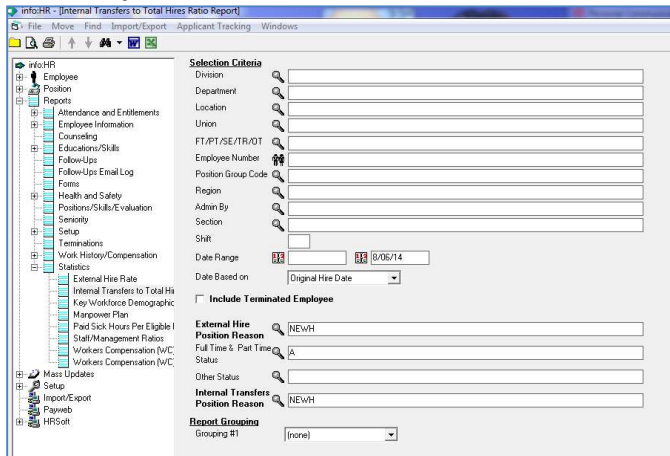
Time: 1:07:19 PM		External Hire Rate Report		RZEXHIRE	
		As of Date: 8/06/14 (Original Hire Date)			
Total External Hires :	0	Total Employees :	16		
Total Full/Part Time External Hires :	0				
Total Other Status External Hires :	0				
Average Employee-count :	16.0	External Hire Rate :	0.00		

## Internal Transfers to Total Hire Ratio

The purpose of this report is to gain statistical information on internal transfers. This is the “hire” of a person who was already employed by the specific organization reporting the data at the time of the hire. E.g. Organizations A and B are part of larger umbrella organization - Organization C. If Organization A hires an employee from B then this would be counted as Internal Transfer for Organization C but for Organizations A and B it would counted as external transfer.

Internal Transfers to Total Hires Ratio = Total Internal Transfers / (Total External Hires + Internal Transfers)

### Screen Layout



- This report is viewed by **External Hire Position Reason Codes**, **Employment Status codes** and **Internal Transfers Position Reason code**. A code must be entered in these selection criteria.

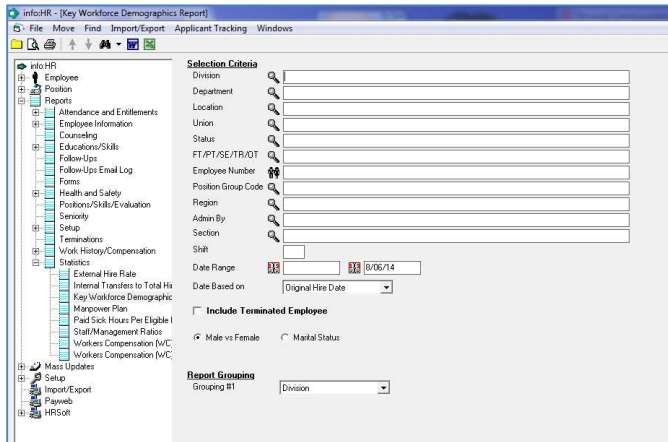
### Sample Report

Time:	Internal Transfers to Total Hires Ratio Report	RZINHIRE																
1:09:29 PM	As of Date: 8/06/14 (Original Hire Date)																	
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Total Internal Transfers :</td> <td style="text-align: center; padding: 5px;">3</td> <td style="padding: 5px;">Total Employees :</td> <td style="text-align: center; padding: 5px;">16</td> </tr> <tr> <td style="padding: 5px;">Total Full/Part Time Internal Transfers :</td> <td style="text-align: center; padding: 5px;">3</td> <td></td> <td></td> </tr> <tr> <td style="padding: 5px;">Total Other Status Internal Transfers :</td> <td style="text-align: center; padding: 5px;">0</td> <td></td> <td></td> </tr> <tr> <td style="padding: 5px;">Total External Hires :</td> <td style="text-align: center; padding: 5px;">3</td> <td style="padding: 5px;">Internal Transfers to Total Hires Ratio :</td> <td style="text-align: center; padding: 5px;">0.5</td> </tr> </table>	Total Internal Transfers :	3	Total Employees :	16	Total Full/Part Time Internal Transfers :	3			Total Other Status Internal Transfers :	0			Total External Hires :	3	Internal Transfers to Total Hires Ratio :	0.5		
Total Internal Transfers :	3	Total Employees :	16															
Total Full/Part Time Internal Transfers :	3																	
Total Other Status Internal Transfers :	0																	
Total External Hires :	3	Internal Transfers to Total Hires Ratio :	0.5															

## Key Workforce Demographic

The purpose of this report is to provide a very basic understanding of some key “demographics” of their employee workforce and how they compare to those of other organizations.

### Screen Layout



- **Male vs Female** selection shows the percentage of Male vs. Female based on the total number of employees.
- **Marital Status** selection shows the percentage of each status code in comparison to the total number of employees.

### Male vs Female – Report Grouping Division

Time:	2:23:20 PM	Employee Gender Breakdown Percentage Report	rzpopag1															
<table border="1"> <tr> <td>Grand Total Number of Employee:</td> <td>18</td> <td>Total For Gender</td> <td>Male: 10</td> <td>55.56%</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Female: 8</td> <td>44.44%</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Invalid: 0</td> <td>0.00%</td> </tr> </table>				Grand Total Number of Employee:	18	Total For Gender	Male: 10	55.56%				Female: 8	44.44%				Invalid: 0	0.00%
Grand Total Number of Employee:	18	Total For Gender	Male: 10	55.56%														
			Female: 8	44.44%														
			Invalid: 0	0.00%														

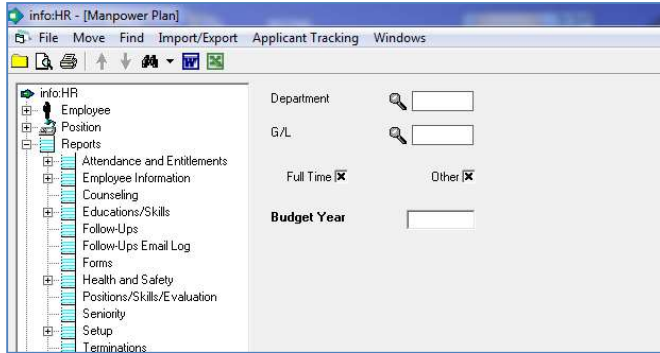
### Marital Status – Grouping None

Time:	11:45:11 AM	Employee Marital Status Breakdown Percentage Report	rzpopag1																																								
<table border="1"> <tr> <td>Grand Total Number of Employee:</td> <td>18</td> <td>Total for Marital Status</td> <td>Single: 11</td> <td>61.11%</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Married: 6</td> <td>33.33%</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Family: 0</td> <td>0.00%</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Divorced: 0</td> <td>0.00%</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Widowed: 0</td> <td>0.00%</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Common-Law: 0</td> <td>0.00%</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Other: 0</td> <td>0.00%</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Invalid: 1</td> <td>5.56%</td> </tr> </table>				Grand Total Number of Employee:	18	Total for Marital Status	Single: 11	61.11%				Married: 6	33.33%				Family: 0	0.00%				Divorced: 0	0.00%				Widowed: 0	0.00%				Common-Law: 0	0.00%				Other: 0	0.00%				Invalid: 1	5.56%
Grand Total Number of Employee:	18	Total for Marital Status	Single: 11	61.11%																																							
			Married: 6	33.33%																																							
			Family: 0	0.00%																																							
			Divorced: 0	0.00%																																							
			Widowed: 0	0.00%																																							
			Common-Law: 0	0.00%																																							
			Other: 0	0.00%																																							
			Invalid: 1	5.56%																																							

## Manpower Plan

The purpose of this report is to provide information based on budgeted staffing requirements by year. Data Maintenance for this function is located under the Setup menu item.

### Screen Layout

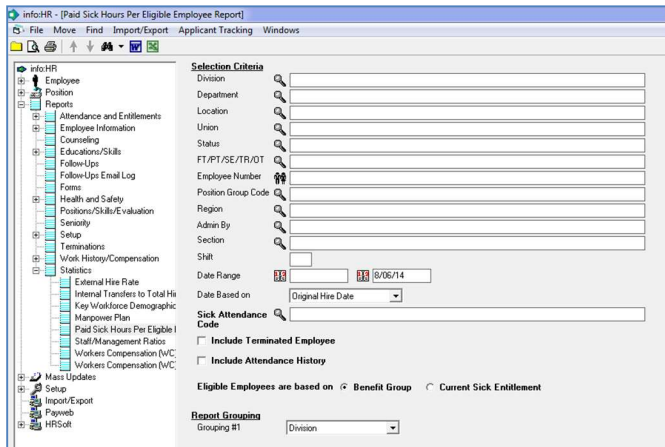


- To view Full Time requirements check **Full Time**, check **Other** to view requirements such as part time or contract.
- Enter the **Budget Year** you wish to view.

Time: 11:57:19 AM		MAN POWER PLAN												RZMANPLAN	
		Budget Year: 2011													
January 01, 2011 - December 31, 2011		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg Count	
G/L		2011	2011	2011	2011	2011	2011	2011	2011	2011	2011	2011	2011	YTD	
Test															
Budget - Full Time		3	2	3		5	3		2	3	3	3	2.2	2.9	
- Other													3.6	3.6	
Actual - Full Time		3	3	3	3	4	2		2	2	2	2	2	2.5	
- Other						2	1		1	1	1	1	1	1.1	
Variation:		0.0	1.0	0.0		1.0	0.0		1.0	0.0	0.0	0.0	(2.8)	0.0	
Budget Total															
Full Time		3.0	2.0	3.0		5.0	3.0		2.0	3.0	3.0	3.0	2.2		
Other													3.6	3.6	
Total		3.0	2.0	3.0		5.0	3.0		2.0	3.0	3.0	3.0	5.8		
Actual Total															
Full Time		3.0	3.0	3.0	3.0	4.0	2.0		2.0	2.0	2.0	2.0	2.0	2.0	
Other						2.0	1.0		1.0	1.0	1.0	1.0	1.0	1.0	
Total		3.0	3.0	3.0	3.0	6.0	3.0		3.0	3.0	3.0	3.0	3.0	3.0	
Variation:		0.0	1.0	0.0	3.0	1.0	0.0	0.0	1.0	0.0	0.0	0.0	(2.8)		

## Paid Sick Hours Per Eligible Employee

The purpose of this report is to provide information on Sick Time available to eligible employees.



- **Sick Attendance** code must be selected. Sick attendance reason codes begin with “SIC”.
- Terminated employees may be included by checking **Include Terminated Employees**.
- Attendance history may be included by checking **Include Attendance History**.
- The report may also be run by **Benefit Group** or **Current Sick Entitlement**.

### Benefit Group, Include Attendance History

Time: 1:14:55 PM	Paid Sick Hours Per Eligible Employee Report		RZPDSICK
	As of Date: 4/29/13 (Original Hire Date)		
<b>Paid Sick Hours:</b>	712.00	<b>Total Employees:</b>	18
<b>Average Eligible Employee-Count:</b>	10.00	<b>Paid Sick Hours Per Eligible Employee:</b>	71.2000

### Current Sick Entitlement

Time: 1:16:45 PM	Paid Sick Hours Per Eligible Employee Report		RZPDSICK
	As of Date: 4/29/13 (Original Hire Date)		
<b>Paid Sick Hours:</b>	32.00	<b>Total Employees:</b>	18
<b>Average Eligible Employee-Count:</b>	14.00	<b>Paid Sick Hours Per Eligible Employee:</b>	2.2857

## Staff Management Ratios

The purpose of this report is to view total numbers of employees under different managerial and non-managerial, supervisory and non-supervisory groups.

The screenshot shows the 'Staff/Management Ratios Report' selection criteria window. It includes a tree view on the left with categories like Employee, Position, Reports, and Statistics. The main area contains various selection criteria such as Division, Department, Location, Union, Status, FT/PT/SE/TR/OT, Employee Number, Position Group Code, Region, Admin By, Section, Shift, Date Range (8/06/14), Date Based on (Original Hire Date), Non-Supervisory Group, Non-Management Group, Supervisory Group, Management Group, and an 'Include Terminated Employees' checkbox. A 'Report Groupings' section at the bottom has a 'Grouping #1' dropdown set to 'Division'.

- **Management Group** code must be entered to produce this report.
- If you would like to **Include Terminated Employees** check the box.

## Sample Report

Time: 2:26:22 PM	Staff/Management Ratios	RZSTFRAT
As of Date: 5/21/13 (Original Hire Date)		
Total Employees:	18	
Total Management Employees:	12	
Total Supervisory (Non-Management) Employees:	0	
Total Non-Management, Non-Supervisory Employees:	0	

## Workers Compensation (WC) Lost Time Incident Rate

The purpose of this report is to view the number of lost time incidents, total employees and the percentage of lost time rate. It counts the # of *Incidents* checked in the Attendance for the Reason codes specified in "WC Lost Time Code". If the "Date Based On" is "Attendance Date" then it only counts the # of incidents in the Attendance within the Date Range specified. Otherwise, if the *Date Based On* is used the report only gives you the # of Incident for the employees within that *Date Based On* and Date Range.

WC Lost Time Incident Rate = Total # of WC Lost Time Incidents / Average WC Eligible Employee Count

### Screen Layout

- **WC Lost Time Code** must be entered to produce this report.
- If you would like to **Include Terminated Employees** check the box.
- If you would like to **Include Attendance History** check the box.

### Sample Report

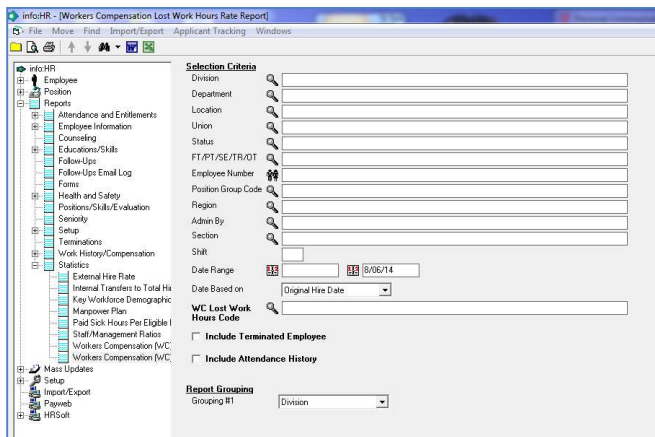
Workers Compensation (WC) Lost Time Incident Rate		
As of Date: 5/21/13 (Original Hire Date)		
WC Lost Time Incidents	WC-Eligible Employee - Count	WC Lost Time Incident Rate
0	17	0.00



## Workers Compensation (WC) Lost work Hours Rate

The purpose of this report is to measure the work hours lost for all the lost time incidents recorded in the lost time incident rate report. The report sums the attendance hours that have *Incident* checked for the Attendance Reason Codes specified in "WC Lost Time Code".

WC Lost Time Work Hours Rate = Total # of WC Lost Work Hours / Average WC Eligible Employee Count



- **WC Lost Work Hours Code** must be entered to produce this report.
- If you would like to **Include Terminated Employees** check the box.
- If you would like to **Include Attendance History** check the box.

### Sample Report

Time: 2:37:48 PM	Workers Compensation (WC) Lost Work Hours Rate	RZWCHRRT
As of Date: 5/21/13 (Original Hire Date)		
<b>WC Lost Work Hours</b>	<b>WC-Eligible Employee - Count</b>	<b>WC Lost Work Hours Rate</b>
0.00	17	0.00