Contents

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.
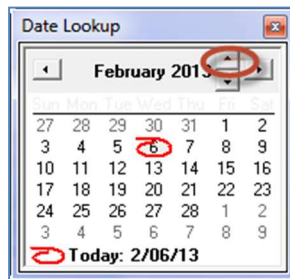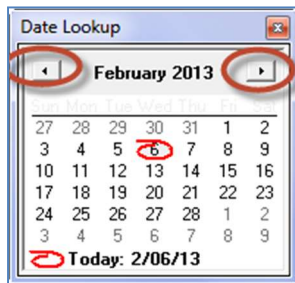
Drop Down Lists

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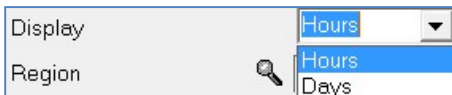
Employee Lookups

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.
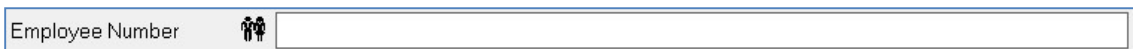
Table Lookups

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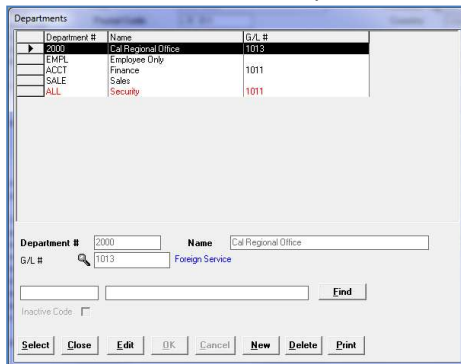
- To create a new code select **New**
- Enter in the **Code** and the **Description**
- Select **OK**

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

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:
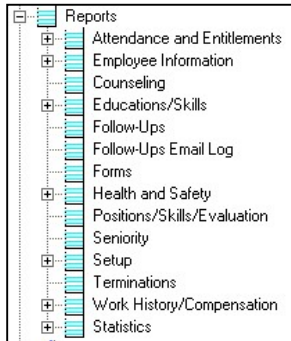
Menu Item	Purpose
Attendance and Entitlements	Section contains reports related to an employee's attendance or entitlements including future-dated vacation entitlements.
Employee Information	Section contains reports related to an employee but is not salary specific.
Counseling	Contains a report with the ability to ask for specifics related to counseling or disciplinary action related to an employee.
Education/Skills	Section contains reports related to courses an employee has taken or the level of education or skills they have.
Follow Ups	Contain a report with the ability to ask for specific follow-ups, future dated or past due, completed or incomplete.
Health and Safety	Section contains reports related to specific incidents, location of injuries, or days of the week.
Position/Skills/Evaluation	Contains a report related to position information, not linked to employees.
Seniority	Contains a report with the ability to ask for a seniority list based upon various different dates.
Setup	Contains reports related to custom reports, security master templates and table master specifics.
Terminations	Contains a report with the ability to get details on employee terminations.
Work History/Compensation	Contains reports related to position and salary data.
Statistics	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.
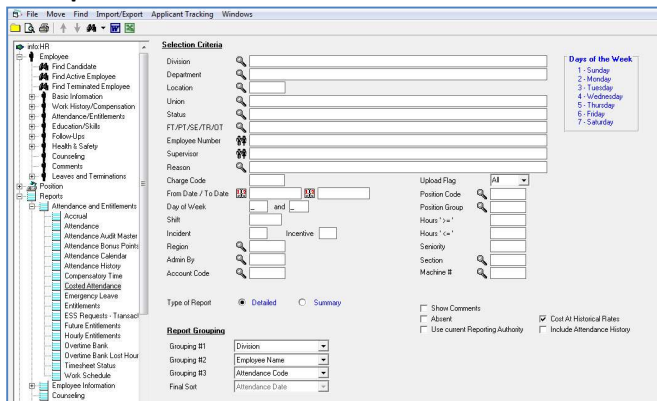
Multiple parameters can be entered in the Selection Criteria. For example, you may wish to run a report for all FT (full time) employees in a specific Union with activities occurring in the next 3 months. The three parameters would need to be entered in the Selection Criteria.

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

Groupings

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

Report Grouping
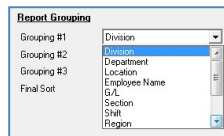
Report Group Drop down

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:
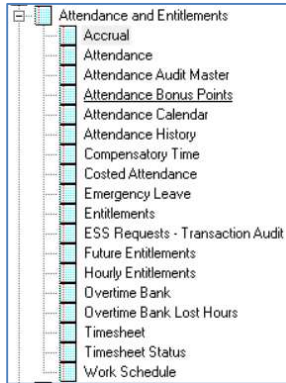
Accrual

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
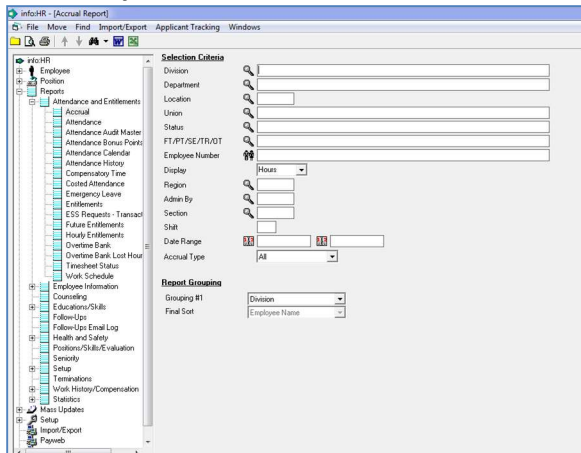
- The **Date Range** checks the *Transaction Date* and not the date that the user physically made the change. Sometimes, the dates are the same. A situation where the dates can be different is during the mass update of Vacation, Sick Time or Hourly Entitlement. In this case, the *Transaction Date* equals 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	12/03/13 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
		3/31/15	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
		12/31/19	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	12/03/13 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	5/21/14 14:51:59	999999999
		12/31/14	-92.00	Current Sick Ent. Chg from 92 to 0		Z	5/21/14 14:52:11	999999999
		1/01/14	12.00	Current Sick Ent. Chg from 0 to 12. OS: 92		U	5/21/14 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 09:53:34	999999999
		1/01/13	20.00	Current Vac. Ent. Chg from 0 to 20. OS: -144		U	12/17/13 09:54:04	999999999
		2/01/13	20.00	Current Vac. Ent. Chg from 20 to 40. OS: -124		U	12/17/13 09:54:07	999999999
Legend:								

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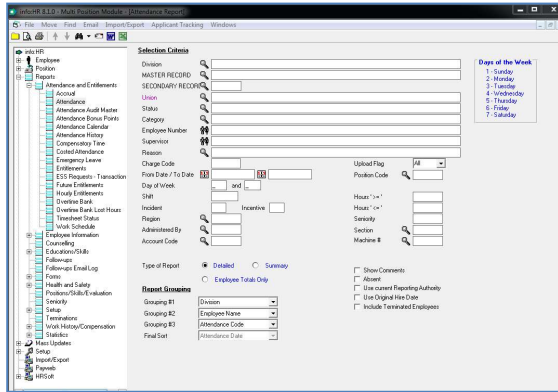
With this report, users can answer some of the following questions:

- 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.

Sample Report – Detailed Attendance Report

Time: 10:54:43 AM		Attendance Report No date entered							RZATTEND

Employee Nbr/Name		Reason	Date	Day of Week	Hours	Days	Charge Code	Inc. Incentive	Sen.
221026	Abbott, John	Vacation	18/01/2012	Wednesday	7.00	0.88		N No	Y
	Totals for	Vacation			7.00	0.88			
	Totals for	Abbott, John			7.00	0.88			
1051	Adams, Karen	Sick time taken	10/10/2012	Wednesday	8.00	1.00		N No	N
	Totals for	Sick time taken			8.00	1.00			
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
	Totals for	Vacation			56.00	7.00			
	Totals for	Adams, Karen			64.00	8.00			
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
	Totals for	Vacation			20.00	2.00			
	Totals for	Anderson, Dane			20.00	2.00			

Sample Report – Summary Attendance Report

Time: 12:42:52 PM		Attendance Summary Report No date entered			RZATTENS

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	
	Totals for	Sampson, Harry	916.00	114.50	
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	
	Totals for	Selby, Murray	84.00	10.50	
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	
	Totals for	Smith, Jane	1,376.00	172.00	
8524	Wesslier, Johnaton	Emergency Leave	8.00	1.07	
8524	Wesslier, Johnaton	Jerry	8.00	1.07	
8524	Wesslier, Johnaton	Lieu Taken	2.00	0.27	
8524	Wesslier, Johnaton	Regular	24.00	3.20	
8524	Wesslier, Johnaton	Sick	37.00	4.93	2
8524	Wesslier, Johnaton	Statutory Holiday	32.00	4.27	
8524	Wesslier, Johnaton	Vacation Earned	40.00	5.33	
8524	Wesslier, Johnaton	Vacation Payout	48.00	6.40	
	Totals for	Wesslier, Johnaton	199.00	26.53	2
		Grand Totals:	13,359.25	1686.21	2

Sample Report – Totals Only Report

Time: 8:13:00 AM	Attendance - Employee Totals Report No date entered			RZATTENSTO

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	

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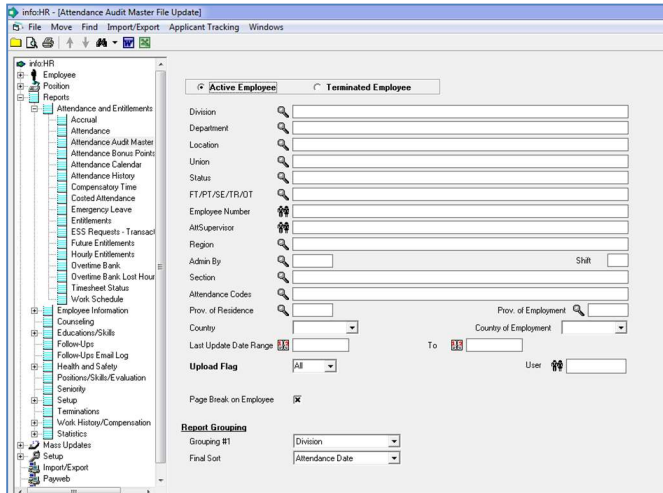
With this report users can determine which module generated an attendance record. It will display who generated or changed a record and what date and time the record was created or changed.

Sample Report – Attendance Audit Report

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

Sample Report – Attendance Bonus Points Detailed

Time: 12:51:18 P			Attendance Bonus Points Detail Report No date entered				RZPOINT

Employee Nbr / Name		Reason	Date	Day of Week	Hours	Points	Running Total
11026	Abbott , John	Regular	3/25/92	Wednesday	8.00	0.0	0.00
11026	Abbott , John	Float Day	3/31/92	Tuesday	5.00	0.0	0.00
				March 1992		0.00	
11026	Abbott , John	Float Day	4/01/92	Wednesday	8.00	0.0	0.00
11026	Abbott , John	Vacation	4/05/92	Sunday	8.00	0.0	0.00
11026	Abbott , John	Vacation	4/15/92	Wednesday	16.00	0.0	0.00
11026	Abbott , John	Sick	4/16/92	Thursday	7.00	0.0	0.00
11026	Abbott , John	Vacation	4/16/92	Thursday	16.00	0.0	0.00
11026	Abbott , John	WCB/Lost Time	4/16/92	Thursday	7.00	0.0	0.00
11026	Abbott , John	Vacation	4/17/92	Friday	8.00	0.0	0.00
11026	Abbott , John	Vacation	4/22/92	Wednesday	1.00	0.0	0.00
				April 1992		0.00	
11026	Abbott , John	Vacation	5/01/92	Friday	8.00	0.0	0.00
			5/01/92	Friday	1.00	0.0	0.00
11026	Abbott , John	Vacation	5/05/92	Tuesday	8.00	0.0	0.00
11026	Abbott , John	Vacation	5/06/92	Wednesday	8.00	0.0	0.00
11026	Abbott , John	Vacation	5/08/92	Friday	8.00	0.0	0.00
11026	Abbott , John	Vacation	5/10/92	Sunday	8.00	0.0	0.00
11026	Abbott , John	Vacation	5/21/92	Thursday	8.00	0.0	0.00
11026	Abbott , John	Vacation	5/22/92	Friday	8.00	0.0	0.00
				May 1992		0.00	
11026	Abbott , John	Regular	6/02/92	Tuesday	8.00	0.0	0.00
11026	Abbott , John	Regular	6/15/92	Monday	8.00	0.0	0.00
11026	Abbott , John	Regular	6/16/92	Tuesday	8.00	0.0	0.00
				June 1992		0.00	

Sample Report – Attendance Bonus Points Summary

Time: 12:52:40 P	Attendance Bonus Points Report No date entered		RZPOINTS

Employee Nbr / Name	Points	Bring Forward Points	Total Points
5505 Smith , Jane	0.00	0.00	0.00

Detailed:	Month	Points
	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 No date entered	RZPOINTT

Division   West Coast Branch

Employee Nbr / Name	Points	Bring Forward Points	Total Points
11026 Abbott , John	8.00	0.00	8.00
8524 Wesslier , Johnaton	0.00	0.00	0.00
West Coast Branch	**8.00**	**0.00**	**8.00**

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

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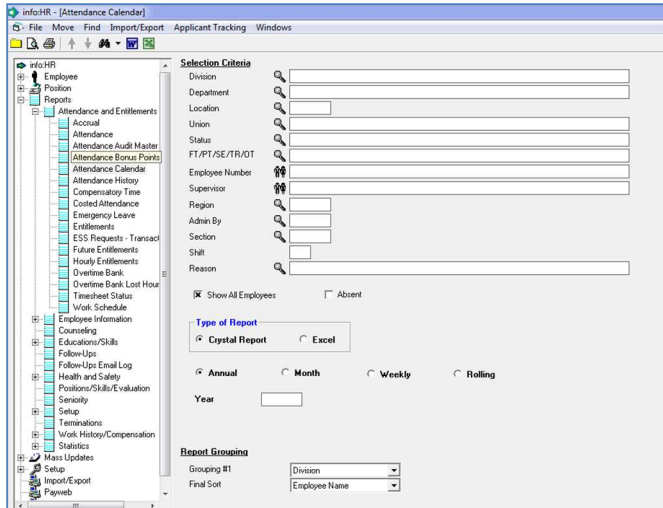
- This report can be run for all attendance codes by leaving the **Reason** field blank. To view absent codes only, check the **Absent** box.
- This report can be displayed in **Crystal Report** or **Excel** format by selecting from **Type of Report.**
- Select how you would like the report to display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

Sample Report – Attendance Calendar Annual

Sample Report – Attendance Calendar Monthly

Sample Report – Attendance Calendar Weekly

Sample Report – Attendance Calendar Rolling

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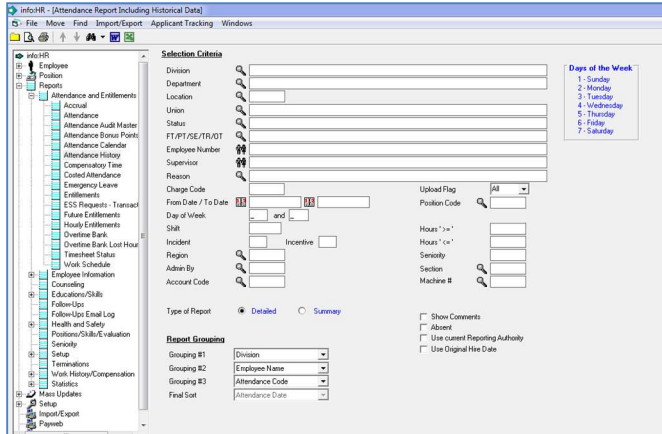
This report shares the same Selection Criteria as the Attendance Report except that it includes both non-archived and archived records.

Sample Report – Attendance Detailed

Time: 11:34:39 AM				Attendance Report Including Historical Data				RZATTDHD			
				As of 01/01/2011 through 30/04/2011							

Employee Nbr/Name		Reason	Date	Day of Week	Hours	Days	Charge Code	Inc.	Incentive	Sen.
221026	Abbott , John	Vacation	17/03/2011	Thursday	4.00	0.50		N	No	Y
	Totals for	Vacation			4.00	0.50				
	Totals for	Abbott , John			4.00	0.50				
1051	Adams , Karen	Comp time earned	14/03/2011	Monday	2.00	0.25		N	No	N
	Totals for	Comp time earned			2.00	0.25				
1051	Adams , Karen	Vacation	14/02/2011	Monday	5.00	0.63		N	No	Y
			11/02/2011	Friday	10.00	1.25		N	No	Y
			09/02/2011	Wednesda	8.00	1.00		N	No	Y
			07/02/2011	Monday	5.00	0.63		N	No	Y
			04/02/2011	Friday	7.00	0.88		N	No	Y
			03/02/2011	Thursday	7.00	0.88		N	No	Y
			02/02/2011	Wednesda	7.00	0.88		N	No	Y
	Totals for	Vacation			49.00	6.13				
	Totals for	Adams , Karen			51.00	6.38				
1014	Anderson , Dane	Vacation	09/02/2011	Wednesda	4.00	0.40		N	No	Y
	Totals for	Vacation			4.00	0.40				
	Totals for	Anderson , Dane			4.00	0.40				
1050	Armstrong , Bob	Comp time earned	11/03/2011	Friday	4.00	0.50		N	No	N
			07/03/2011	Monday	3.00	0.38		N	No	N
	Totals for	Comp time earned			7.00	0.88				
1050	Armstrong , Bob	Vacation	21/04/2011	Thursday	3.50	0.44		N	No	Y

Sample Report – Attendance Summary

Time: 1:12:50 PM		Attendance Summary Report Including Historical Data			RZATTDHS	
		No date entered				

Employee Nbr. / Name		Reason	Hours	Days	Incident
11026	Abbott , John	Emergency Leave	2.00	0.25	
11026	Abbott , John	Float Day	26.00	3.25	
11026	Abbott , John	Lieu Banked @ 1.5	24.00	3.00	
11026	Abbott , John	Lieu Earned	86.00	10.75	
11026	Abbott , John	Lieu Taken	46.00	5.75	
11026	Abbott , John	Sick	148.00	18.50	
11026	Abbott , John	Vacation	1,293.50	161.69	
	Totals for	Abbott , John	1,625.50	203.19	
3011	Abel , Samantha	Float Day	8.00	1.00	
3011	Abel , Samantha	Lieu Earned	5.00	0.63	
3011	Abel , Samantha	Vacation	124.00	15.50	
	Totals for	Abel , Samantha	137.00	17.13	
1051	Adams , Karen	Float Day	32.00	4.00	
1051	Adams , Karen	Lieu Earned	11.00	1.38	
1051	Adams , Karen	Lieu Taken	2.00	0.25	
1051	Adams , Karen	Sick	184.00	23.00	1
1051	Adams , Karen	Vacation	540.00	67.50	
	Totals for	Adams , Karen	769.00	96.13	1

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

- **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.

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 *** Earned	Taken	Balance	Balance In Equivalent Days
3011 Abel , Samantha	Browning , Janice	Monday	6/02/14	5.00		5.00	0.63
Totals for:	**Abel , Samantha**			**5.00**	**0.00**	**5.00**	**0.63**
8524 Wesslier , Johnaton	Abbott , John	Friday	12/06/13		2.00	-2.00	-0.27
Totals for:	**Wesslier , Johnaton**			**0.00**	**2.00**	**-2.00**	**-0.27**
	Total For Company:			**5.00**	**2.00**	**3.00**	**0.36**

Sample Report – Compensatory Time Summary

Time: 11:43:01 AM				Summarized Compensatory Time Report				RZCOMPS1

Employee Nbr/Name	Reporting Authority	*** In Hours *** Earned	Taken	Balance	Balance In Equivalent Days	Extended Cost
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
	Total For Company:	**49.50**	**8.00**	**41.50**	**4.89**	**1,365.40**

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 **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.

Sample Report –Costed Attendance Detailed

Employee Nbr/Name	Reason	Date	Day of Week	Hours	Days	Costs	Charge Code	Inc.	Incentive	Sen.
Time: 11:53:43 A			Costed Attendance Report As of 01/04/2013 through 30/04/2013				RZATTCHT			
221026 Abbott , John	Comp time earned	01/04/2013	Monday	5.00	0.63	231.10		N	No	N
	Total for Comp time earned			5.00	0.63	231.10				
221026 Abbott , John	Course	04/04/2013	Thursday	7.00	0.88	323.54		N	No	N
	Total for Course			7.00	0.88	323.54				
221026 Abbott , John	Vacation	09/04/2013	Tuesday	7.00	0.88	323.54		N	No	Y
	Total for Vacation			7.00	0.88	323.54				
	Total for Abbott , John			19.00	2.38	878.18		0		
1013 Brown , Thomas	Vacation	22/04/2013	Monday	7.00	0.88	135.52		N	No	Y
		19/04/2013	Friday	7.00	0.88	135.52		N	No	Y
		18/04/2013	Thursday	7.00	0.88	135.52		N	No	Y
		17/04/2013	Wednesda	7.00	0.88	135.52		N	No	Y
	Total for Vacation			28.00	3.50	542.08				
	Total for Brown , Thomas			28.00	3.50	542.08		0		
5000 Haile , Jenny	Comp time earned	15/04/2013	Monday	2.00	0.25	56.00		N	No	N
	Total for Comp time earned			2.00	0.25	56.00				
5000 Haile , Jenny	Comp time taken	18/04/2013	Thursday	1.50	0.19	42.00		N	No	N
	Total for Comp time taken			1.50	0.19	42.00				
	Total for Haile , Jenny			3.50	0.44	98.00		0		
1012 King , Deborah	Conference	24/04/2013	Wednesda	7.00	0.88	336.56		N	No	N
	Total for Conference			7.00	0.88	336.56				

Sample Report – Costed Attendance Summary

Employee Nbr. / Name	Reason	Hours	Days	Costs	Incident
Time: 2:03:40 PM	Costed Attendance Summary Report No date entered			RZATTCHS	
78631 Adamson , Jennifer	Vacation Payout	80.00	10.00	0.00	
78631 Adamson , Jennifer	Vacation Earned	80.00	10.00	0.00	
Total for Adamson , Jennifer		256.00	32.00	208.48	
1050 Armstrong-Smith , Grant	Couse	180.00	22.50	3,575.36	
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	716.00	89.50	22,155.92	
1050 Armstrong-Smith , Grant	Sick Payout	64.00	8.00	2,616.96	
1050 Armstrong-Smith , Grant	Statutory Holiday	192.00	24.00	6,887.36	
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	
Total for Armstrong-Smith , Grant		2,799.25	349.91	92,417.54	

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	
Total for Abbott , John	42.00	5.25	2,124.00	
3001 Abel , Alex	196.00	24.50	5,455.31	
Total for Abel , Alex	196.00	24.50	5,455.31	
1014 Anderson , Dane	36.00	4.50	204.63	
Total for Anderson , Dane	36.00	4.50	204.63	
1050 Armstrong , Bob	75.00	9.38	3,116.28	
Total for Armstrong , Bob	75.00	9.38	3,116.28	
2028 Browning , Janice	18.00	2.25	352.00	
Total for Browning , Janice	18.00	2.25	352.00	
1054 Harper , Betsy	5.00	0.63	69.10	
Total for Harper , Betsy	5.00	0.63	69.10	
1012 King , Deborah	2.00	0.25	0.00	
Total for King , Deborah	2.00	0.25	0.00	
2210 O'Hara , Jeri	7.00	0.93	167.79	
Total for O'Hara , Jeri	7.00	0.93	167.79	
5984 Sartre , Mary-Ellen	10.25	1.28	232.06	
Total for Sartre , Mary-Ellen	10.25	1.28	232.06	
11011 YOUNG , YOGI	83.50		951.72	
Total for YOUNG , YOGI	83.50		951.72	
Grand Totals:	474.75	48.96	12,672.89	

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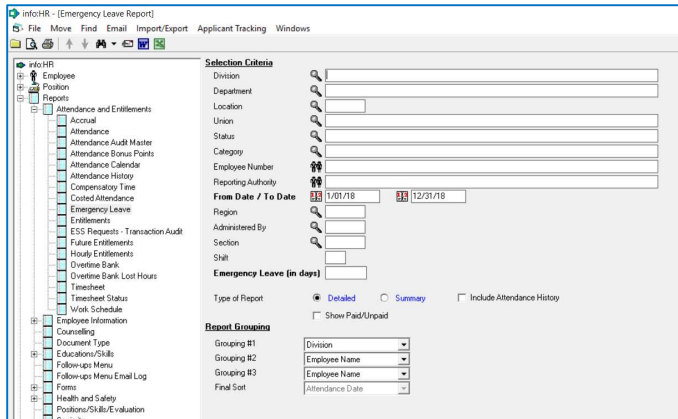
- **Type of Report** – A **Detailed** report will list each day of the week the attendance code was used. A **Summary** report will tally up the hours and give the total value.
- If checked, **Include Attendance History** will show attendance details in the current attendance screen and attendance history.

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 | | | | |

Emergency Leave	10.00					
Employee Nbr/Name		Reason	Date	Hours Taken	Days Taken	Outstanding
11026 Abbott , John		Emergency Leave	7/18/14	16.00	2.00	
Totals for:	Abbott , John			16.00	2.00	8.00
		Total For Company:		16.00	2.00	8.00

Sample Report – Emergency Leave Summary

| Time: | 1:57:30 PM | Summarized Emergency Leave Report | | | | RZEMELES |
| | | As of 1/01/14 through 12/31/14 | | | | |

Emergency Leave	10.00				
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
	Total For Company:		880.00	110.00	-70.00

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
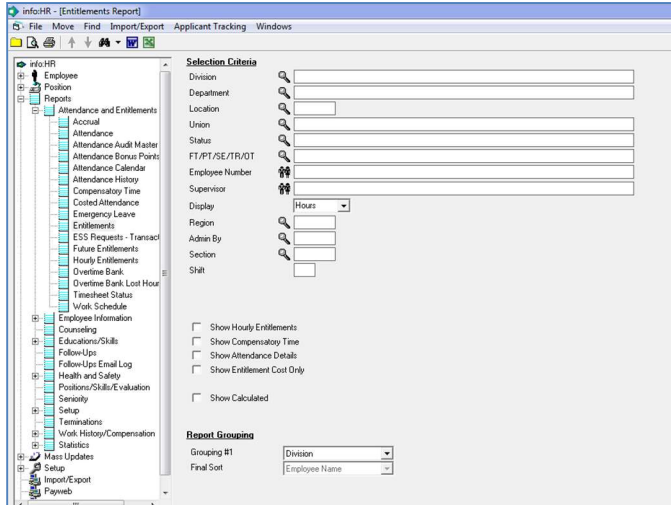
- This report can **Display** Entitlements in Hours or Days by using the drop down.
- **Show Hourly Entitlements** will include any hourly entitlements that are set up for employees.
- **Show Compensatory Time** will include the earned, taken and outstanding balance of comp time.
- **Show Attendance 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

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
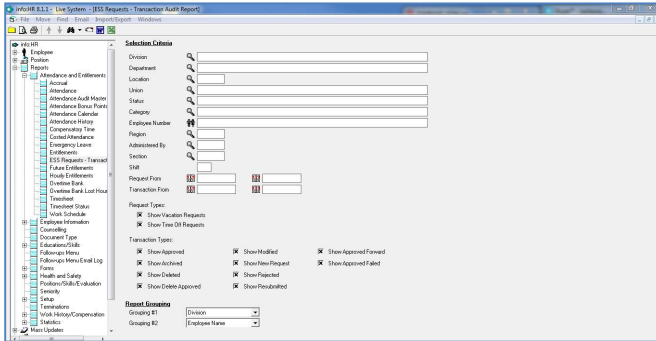
- This report will display transactions by either **Vacation** Request Date or by **Transaction** Date. Use the appropriate date range to view requests.
- **Show Vacation Requests** will show Vacation Requests only.
- **Show Time Off Request** will show Time Off Requests only.
- Check both if you would 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

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
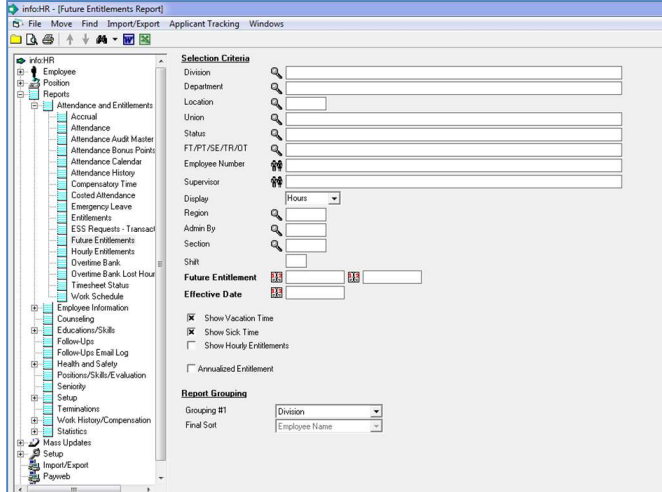
- This report can **Display** Entitlements in Hours or Days by using the drop down.
- A **Future Entitlement Date** range must be entered, e.g. January 1-December 31, 2014.
- An **Effective Date** must be entered. This is the date you want to base the future entitlement calculation on. For example, as 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

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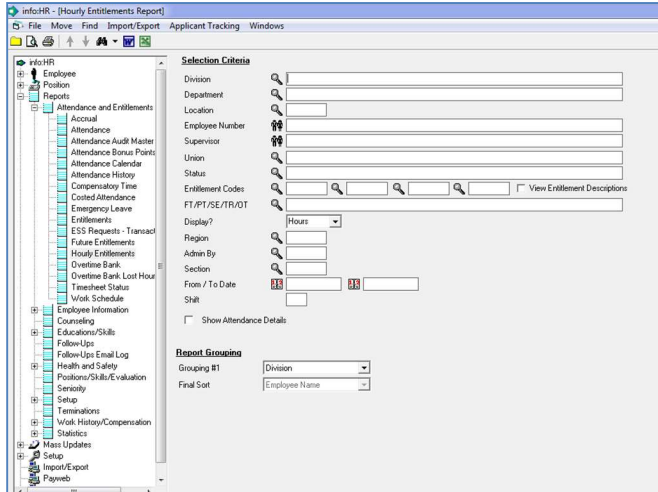
- This report can **Display** Entitlements in Hours or Days by using the drop down.
- Specific hourly entitlement codes can be selected, if left blank all will appear on the report.
- **Show Attendance Detail** will list days taken for each entitlements.

Sample Report – Hourly Entitlements

Time: 12:58:20 PM		Hourly Entitlements in Days						RZHENTDS
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
	Sick	0.00	10.00	0.00	10.00	01/01/2012	31/12/2012	Yes
Adams, Karen	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
	Sick	0.00	8.75	0.00	8.75	01/01/2012	31/12/2012	Yes
Anderson, Dane	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
	Sick	0.00	10.00	0.00	10.00	01/01/2012	31/12/2012	Yes
Armstrong, Bob	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
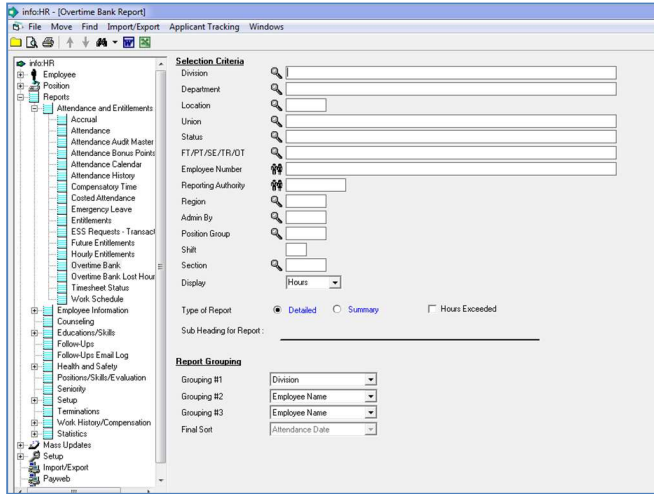
- This report can **Display** Entitlements in Hours or Days by using the drop down.
- **Type of Report** – A **Detailed** report will list each day of the week the attendance code was used. A **Summary** report will tally up the hours and give the total value.
- If **Hours Exceeded** is checked, the 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						RZOVTBS1
		Earned					**Max. OT**
Employee Nbr/Name	Reporting Authority	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 Mansglebe, 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
	Total For Company:	**62.00**	**15.00**	**5.00**	**72.00**	**569.00**	**584.00**

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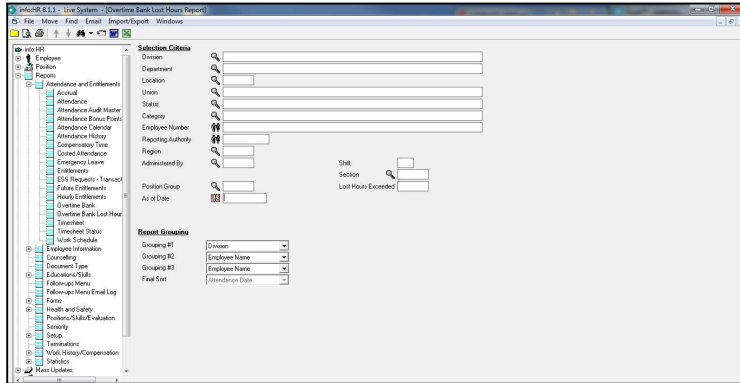
- **As of Date** allows you to enter a date up to which you would like to view the lost hours.
- **Lost Hours Exceeded** provides the ability to view hours in excess of the value entered.
  - Example: if you would like to see how many employees lost more than 5 hours you would enter 5 in this field and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

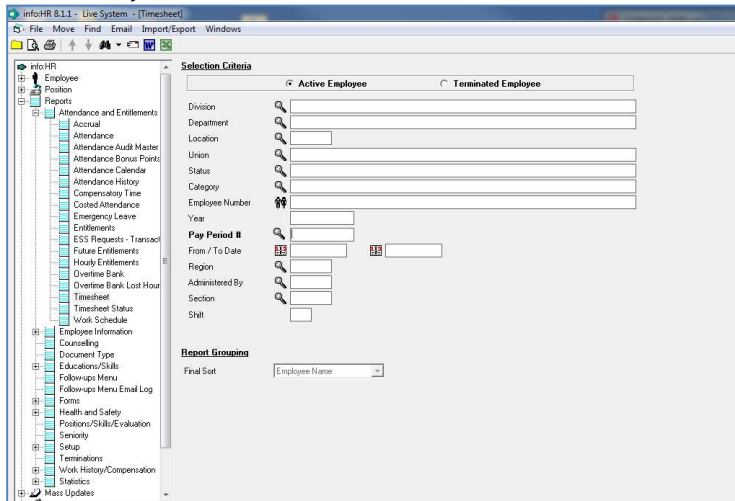**Sample Report – Lost Hours Report**

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.
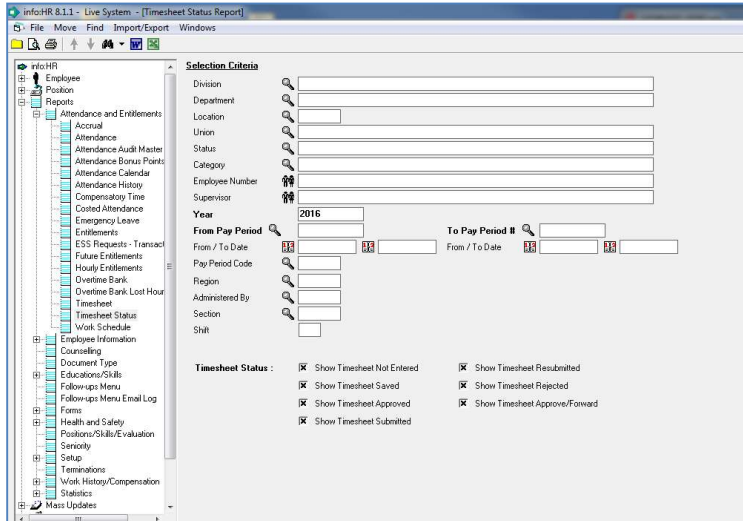
Sample Report

Timesheet Status

The purpose or 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.
  - o 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				
2									
3									
4	Employee Number / Name		2012/1	2012/2	2012/3	2012/4	2012/5	2012/6	2012/7
5	221026	Abbott, John	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
6	1051	Adams, Karen	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
7	1014	Anderson, Dane	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
8	1050	Armstrong, Bob	Not entered	Resubmitted	Approved	Saved	Approved	Saved	Saved
9	1013	Brown, Thomas	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
10	2210	Drac, Jeri	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
11	5000	Haile, Jenny	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
12	5001	Haile, William	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
13	1054	Harper, Betsy	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
14	1012	King, Deborah	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
15	1052	Mansfield, Katherine	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
16	1053	Mansglebe, Jayne	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
17	10231	Sampson, Harry	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
18	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
19	1027	Saunders, Carey	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered	Not entered
20									
21									
22		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
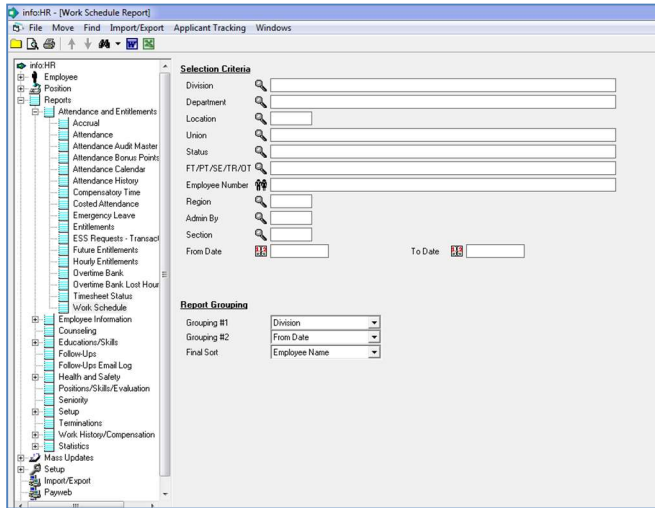
- A **From** and **To** date can be entered to display work schedules within a specific date range.

Sample Report

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:
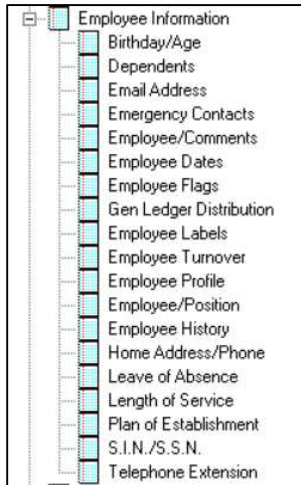
Birthday/Age

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

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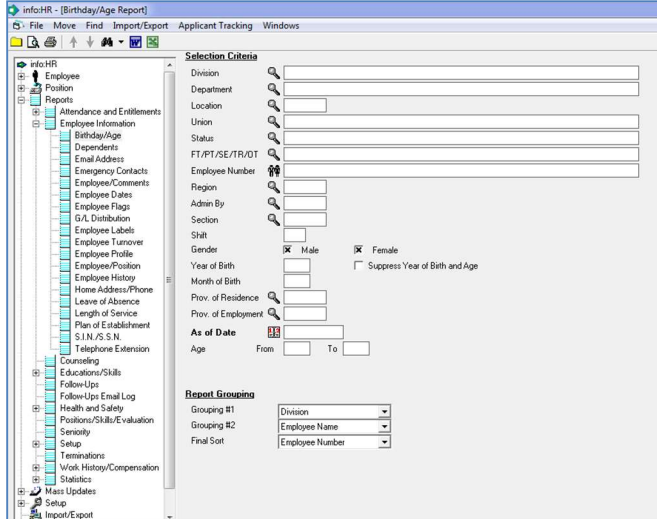
- This report can be run specifically for male or female by selecting the **Gender** box.
- This report can be run for a specific **Year** or **Month** of birth.
- **Suppress Year of Birth and Age** will only display the month and day of the birth date.
- To run the report asking for a specific age range,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

Sample Report – Birthday Report Showing Age

Time:3:18:35 PM		Alphabetical Birthday/Age Report by Name				RZAGENMB
		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	15/02/1963	50.58	ABC	SALE	NON	SWO
5000	Haile, Jenny	01/02/1963	50.58	3000	ADMN	CUPE	
5001	Haile, William	11/05/1932	81.33	1001	ACCT	CUPE	
1054	Harper, Betsy	15/05/1963	50.33	ABC	HR	SW	
1012	King, Deborah	01/06/1960	53.25	1001	SALE	NON	
1052	Mansfield, Katherine	10/04/1969	44.42	ABC	HR	NON	
1053	Mansglebe, Jayne	26/04/1965	48.42	ABC	HR	NON	
10231	Sampson, Harry	05/03/1967	46.52	2000	SALE	CUPE	
5984	Sartre, Mary-Ellen	26/04/1969	44.42	6000	SALE	NON	MISS
1027	Saunders, Carey	10/04/1970	43.42	2000	SALE	ASSN	

		Average Age	55.63
	Total Number of Employees		15

Sample Report – Birthday Report Supressing Age

Time:2:11:35 PM		Alphabetical Birthday/Age Report by Name				RZAGENM1

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	Adamson, Jennifer	Feb 11	2000	ACCT	NON	
1050	Armstrong-Smith, Grant	Jan 01	2000	ACCT	ASSN	WLA
1013	Brown, Thomas	Mar 15	2000	ACCT	NON	
2028	Browning, Janice	Nov 01	2000	ACCT	NON	
5545	Darksey, Pat	Sep 15	PWN	SALE	NON	BH
1025	Davis, Celia	May 12	2000	2000	NON	
1865	Gillies, Catherine	May 10	2000	1000		
5001	Haile, 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	Wesslier, Johnaton	Sep 05	LA	2000		BH

	Total Number of Employees	16

Dependents

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

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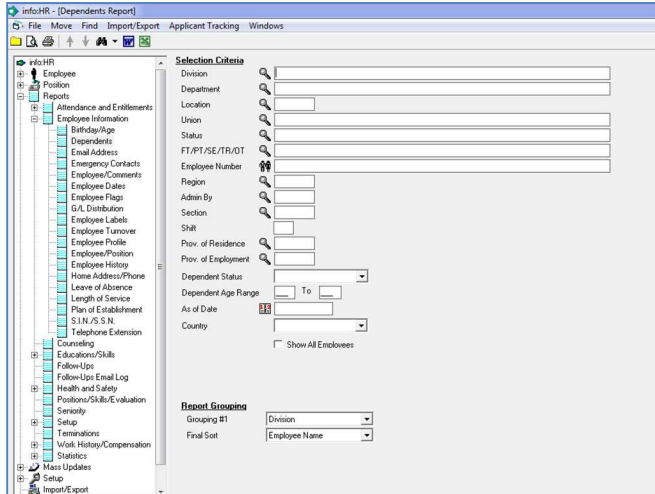
- **Dependent Status** allows the user to select a specific status; if left blank, all dependent statuses will display.
- **Dependent Age Range** allows the user to specify a specific age range.
- **Show All Employees** will print a list of all employees within the selection criteria regardless whether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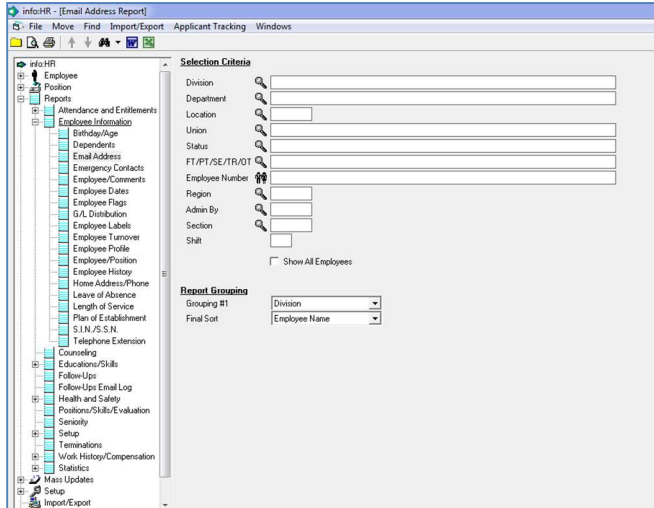
Sample Report

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	ARMSTRONG, COSMO	M	4/10/96	18.33	Son	No Other
Davis, Celia	DAVIS, 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		barb arac@infohr.com	
Sales	1051	Adams , Karen		kadams@efer.uk	
Finance	1050	Armstrong-Smith , Grant		to.jerryr@gmail.com	
Finance	1013	Brown , Thomas		tb rown@abc.ca	
Finance	2028	Browning , Janice		jbrowning@egea.ca	
Sales	5545	Darksey , Pat		pdarkey@afdfe@ca	
Cal Regional Office	1025	Davis , Celia		cdavis@adfae.ca	
Finance	5001	Haile , William		whaile@fadfae.com	
Finance	5505	Smith , Jane		jsmith1@myoffice.com	
Cal Regional Office	8524	Wesslier , Johnaton		sadfas@ddfasl.com	
		Total Employees		11	

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		barb arac@infohr.com	
Sales	1051	Adams , Karen		kadams@efer.uk	
Finance	78631	Adamson , Jennifer			
Finance	1050	Armstrong-Smith , Grant		to.jerryr@gmail.com	
Finance	1013	Brown , Thomas		tb rown@abc.ca	
Finance	2028	Browning , Janice		jbrowning@egea.ca	
Sales	5545	Darksey , Pat		pdarkey@afdfe@ca	
Cal Regional Office	1025	Davis , Celia		cdavis@adfae.ca	
Human Resources	1865	Gillies , Catherine			
Finance	5001	Haile , William		whaile@fadfae.com	
Cal Regional Office	1012	King , Debra			
Sales	1231	Sampson , Harry			
Finance	1021	Selby , Murray			
Finance	5505	Smith , Jane		jsmith1@myoffice.com	
Cal Regional Office	8524	Wesslier , Johnaton		sadfas@ddfasl.com	
		Total Employees		16	

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
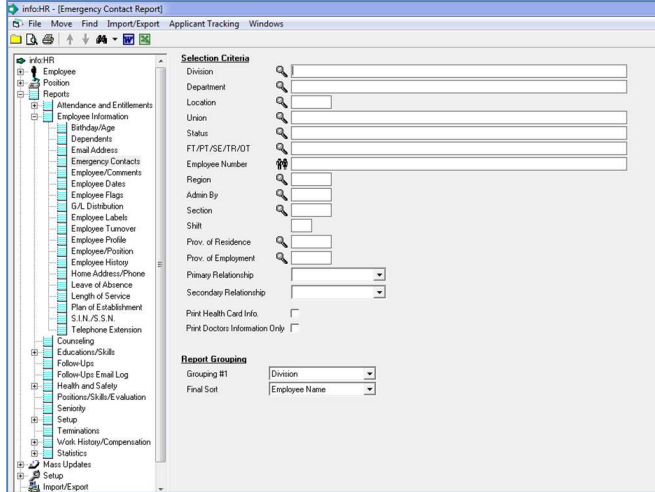
- **Primary Relationship** – This drop down is used if the user only wants a specific relationship of the primary contact to be displayed. For example, only show those employees that have their mother as their primary contact.
- **Secondary Relationship** - This drop down is used if the user only wants 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

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

Sample Report – Print Doctors Information Only

Time: 1:24:21 PM	Emergency Contact Report - Doctors Information Only		RZEMERG1D
Employee Name	**Doctor Information**		**Doctor Ty**
Abbott , John		Address 1:	Primary Do
		Address 2:	
		Address 1:	Secondary Do
		Address 2:	
Abel , Alex	Dr. V Bell	Address 1: 5 Scotland Road	Primary Do
		Telephone: (416) 497-3636	
Anderson , Dane	Dr. Liang	Address 1:	Primary Do
		Telephone: (519) 524-5548	
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
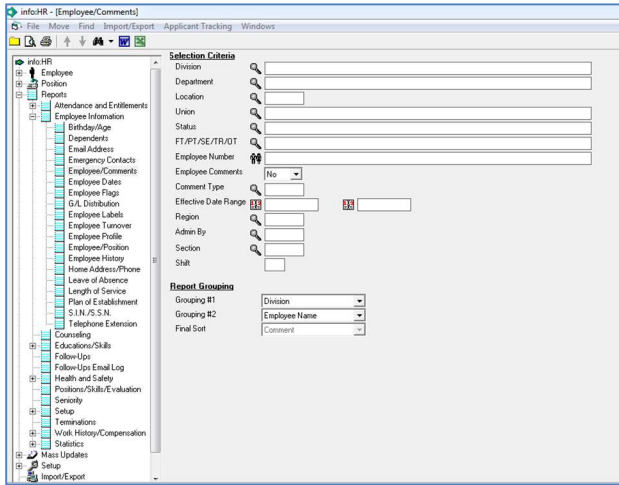
- To view **Employee Comments** on the report select **Yes** from the drop down. If you would like to view only the comments select **Only.**
- **Effective Date Range** refers to comments. If a date range is entered, Comments falling within the date range will be printed.

Sample Report - No Employee Comments (Page 1)

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

```
Time: 2:22:33 PM                    Detailed Employee Master Report                    RZMASTER

Emergency Contact Data
  Primary Contact                                    Secondary Contact
    Name:           LEANNA ARMSTRONG                    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:
  Primary Doctor                                     Secondary Doctor
    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.
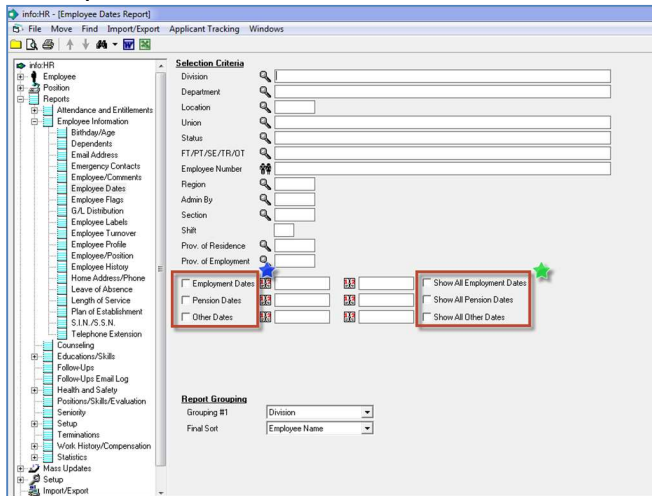
This is an Excel-based report that shows all employment dates for the selected criteria.

- 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

Sample Report – Pension Dates

Sample Report – Other Dates

	A	B	C	D	E	F	G	H	I	J	K	L	M
1						HR Systems Strategies							
2						Employee Dates Report							
3	Date: Jul 30, 2014												
4	Time: 08:42:56												
5													
6	Group by (none)												
7									Other Dates				
8	Employee #	Name	Position	Other Date 1	Other Date 2	Other Date 3	Other Date 4	Other Date 5	Other Date 6	Other Date 7	Other Date 8	Other Date 9	Other Date 10
9	11026	Abbott, John	Chief Information Officer										
10	3011	Abel, Samantha	HR Generalist										
11	1051	Adams, Karen	Benefits & Pension Admin										
12	78631	Adamson, Jennifer	Receptionist										
13	1050	Armstrong-Smith, Grant	Chief Information Officer										
14	1013	Brown, Thomas	Director, Human Resources										
15	2028	Browning, Janice	HR Clerk										
16	5545	Darksey, Pat	Sales Manager										
17	1025	Davis, Celia	HR Clerk										
18	1865	Gillies, Catherine	Director, Human Resources										
19	5001	Haile, William	Receptionist										
20	1012	King, Debra	Benefits & Pension Admin										
21	1231	Sampson, Harry	Receptionist										
22	1021	Selby, Murray	AR Clerk										
23	5505	Smith, Jane	Developer										
24	8524	Wesslier, Johnaton	Programmer										
25													

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

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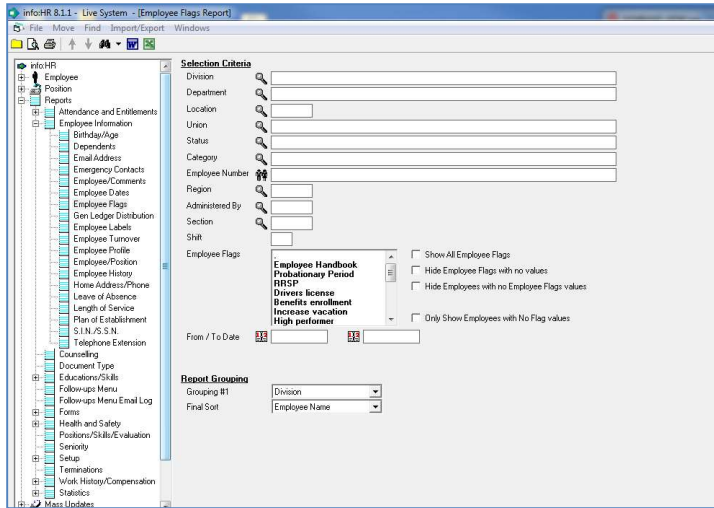
- The default setting for this report is to show the details for all flags.
- If the user only wishes to view some flags, but not all, select the desired flags in the **Employee Flag** drop down using the Crtl key.

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

General Ledger Distribution

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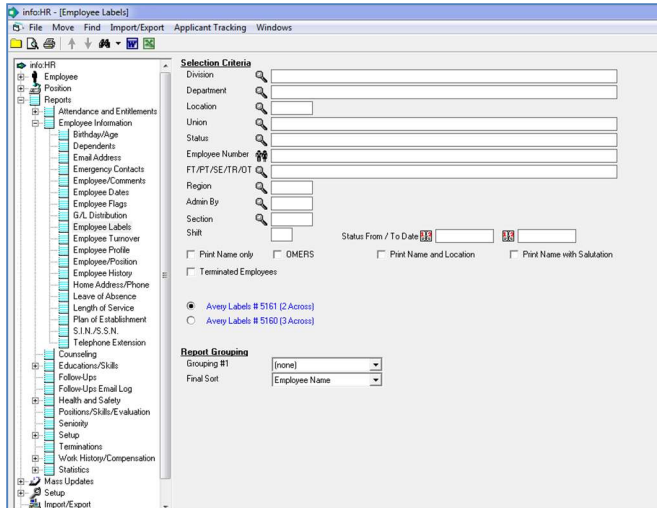
Screen Layout

Sample Report

Employee 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

John Abbott 125 MILTOWN AVE. SCARBOROUGH ON M4T 1S2	**Alex Abel** 125 Main ST Fergus ON N1M 3V3
Dane Anderson 105 Rowena Drive APT 412 LONDON ON N4N 4N4	**Bob Armstrong** 250 Main Street South Suite 400 TORONTO ON M5B 3C3
Thomas Brown 219-785 HOPEWELL CRES. Apt 123 LONDON ON N4N 4N4	**Janice Browning** 355 GLEBE AVE. APT 201 TORONTO ON M4T 1S2
Jenny Haile 554 CHURCH ST. SCARBORO ON M4R 2E1	**William Haile** 554 CHURCH ST. 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
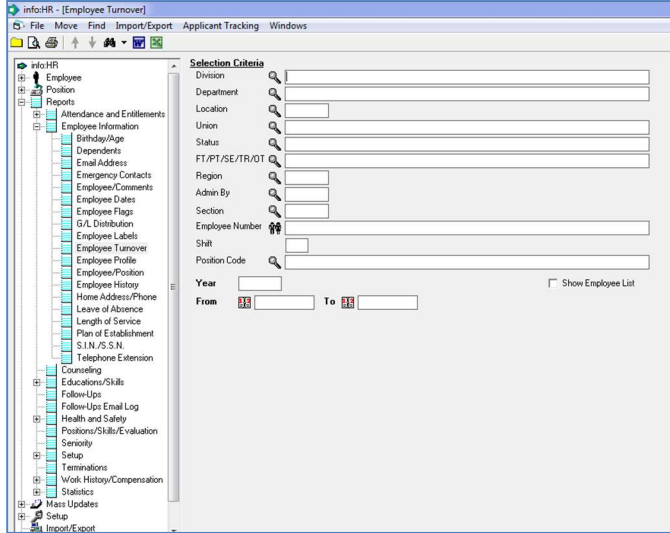
- The user must enter the **Year** for which they want the turnover details.
- A **From** and **To** date must be entered. This could be for the full year, or part thereof.
- The default setting of this report is to display the details sorted by division and then department; no employee names are included.
- **Show Employee List** will display the names associated with the terminations.

Sample Report - Employee Turn Over

Sample Report – Showing Employee List

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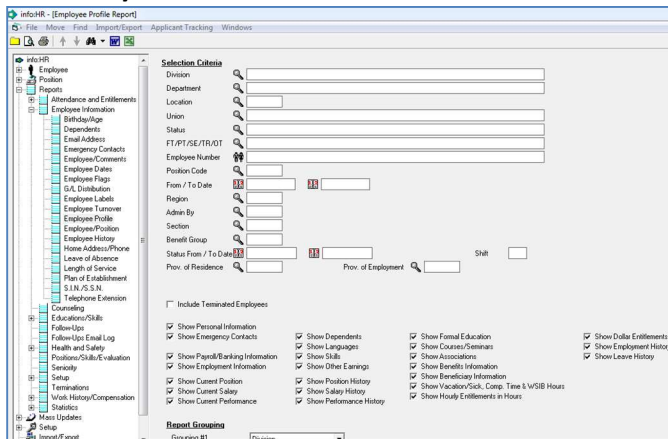
- The default setting of this report is to only show active employees; to see terminated employees as well, check **Include Terminated Employees.**
- By default, all items are selected**.** To hide an employee category of information, uncheck the box associated with the category**.**

Sample Report – (Page 1 of 4)

- 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".
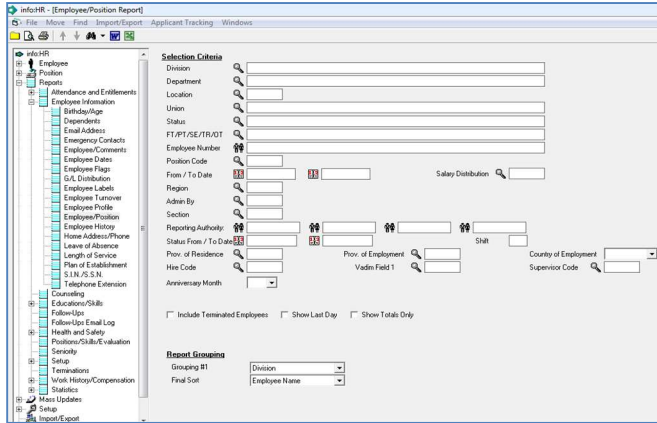- To get a list of all employees hired within a given month, select the **Anniversary Month** from the drop down. Using the date range will give you a list of employees hired within the date range for that month.
- The default setting on this report is to display active employees only. To see terminated 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	Adamson , 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
	Grand Total for Company:		16				1.95

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
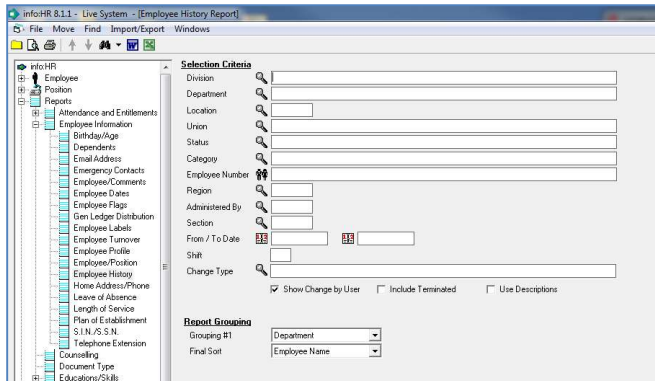
- To view specific changes to an employee record, select those changes using the **Change Type** table. Check each box of the corresponding change type to display the details for it. If no change type is selected, all change types will display.
- The **Show Change by User** needs to be checked if you 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

Home Address/Phone

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

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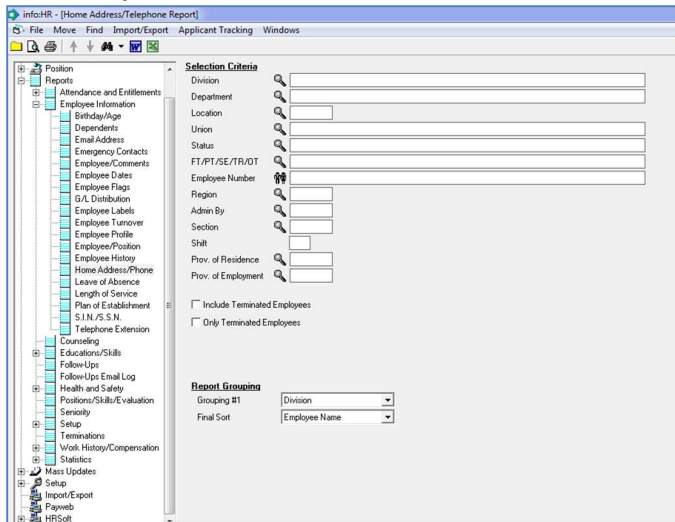
- The default setting on this report is to display details for active employees only. To include terminated employees in the list, select **Include Terminated Employees**.
- If the user only wants the details of terminated employees and not active, select **Only Terminated Employees**.

Sample Report

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.
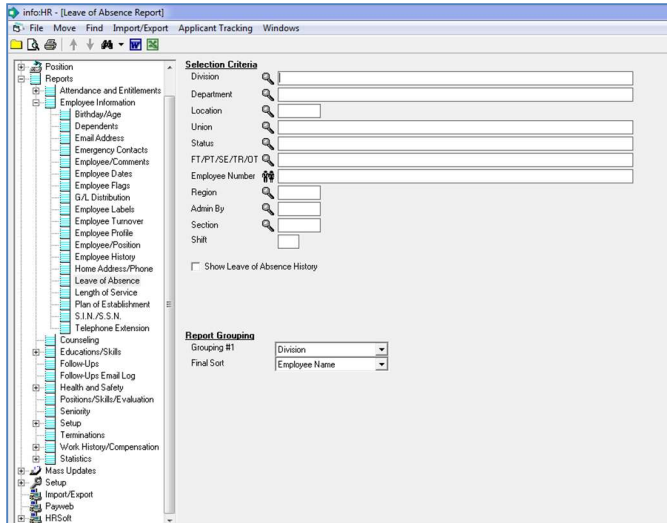
Sample Report – Leave of Absence

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				RZTLOAHist1

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	15.2
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
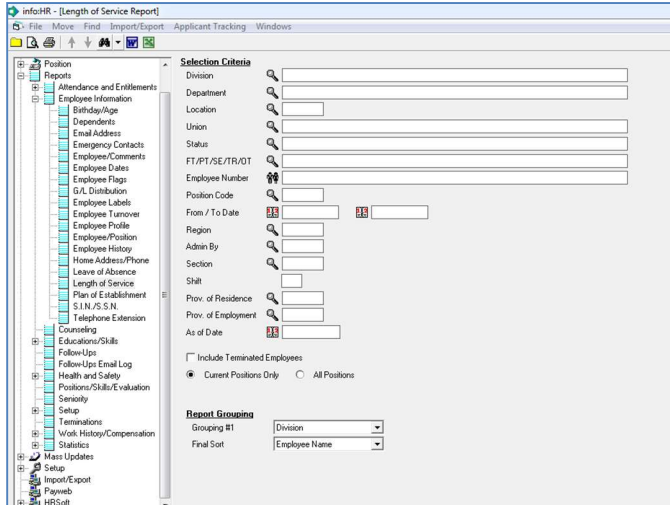
- Columns include: Employee #, Name, Position, Original Date of Hire, Position Start Date, Position End Date, Current and Length of Service.
  - Current will display Yes or No.
  - Length of Service calculation: If there is no Position End Date, the report uses the As of Date as the end date for that 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
11026	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
78631	Adamson , 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
1865	Gillies , Catherine	Director, Human Resources	5/30/14	5/30/14		Yes	0.18
5001	Haile , 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	4/01/97		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

Total Number of Employees : 16

Average Length of Service : 9.1

Sample Report - All Positions

Time: 2:37:45 PM		Length of Service Report as of August 05, 2014				RZLOS2	
Number	**Name**	**Position**	**Original Hire Date**	**Position** **Start Date**	**End Date**	**Current**	**Length of Service**
11026	Abbott , John	Developer	3/15/89	3/15/89		No	25.41
11026	Abbott , John	Programmer	3/15/89	9/15/90		No	23.90
11026	Abbott , John	MIS Director	3/15/89	5/21/95		No	19.22
11026	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	Adamson , 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.
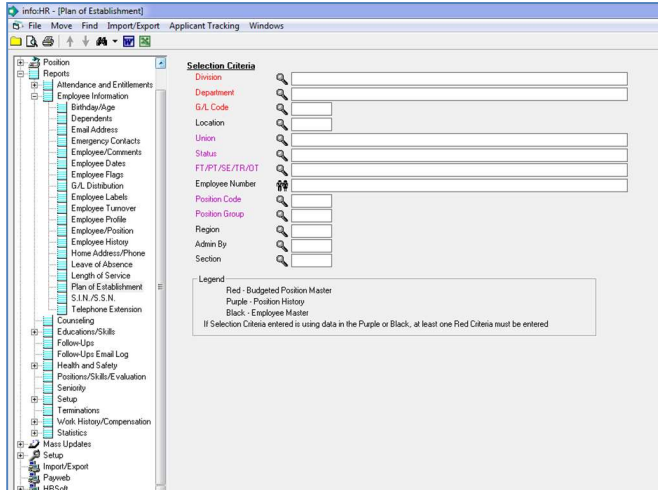
Screen Shot

Sample Report

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

SIN/SSN

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

Screen Layout
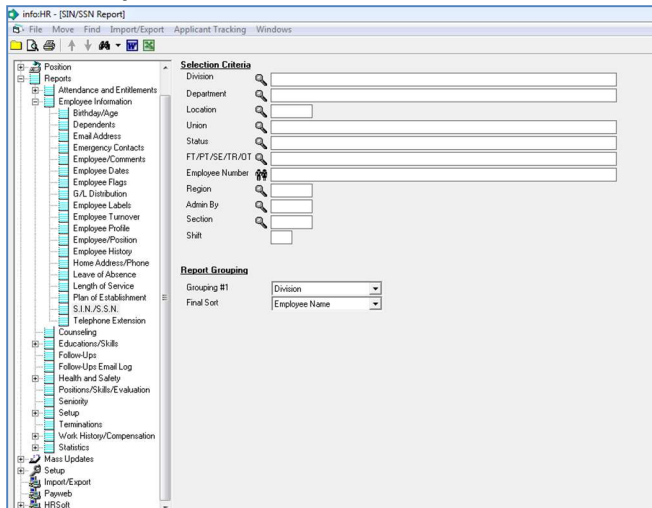
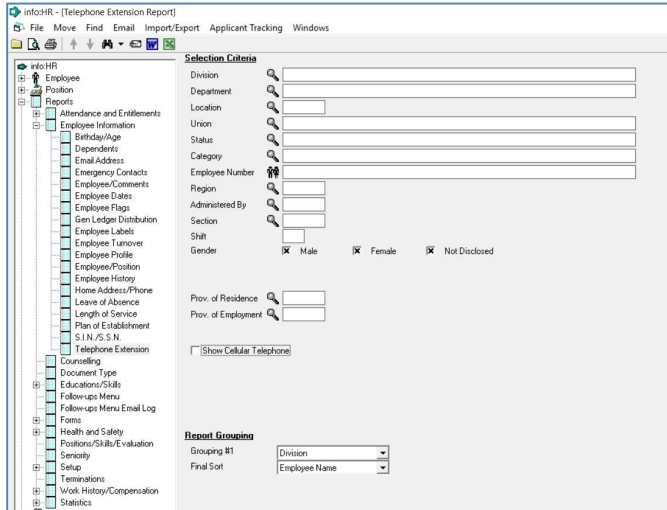**Sample Report**

Time:	8:12:00 PM		S.I.N. / S.S.N. Report		RZ SINSSN
Team	**Employee Number/Name**		**Country**		
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	Mansglebe , Jayne	CANADA	S.I.N.	999-999-999
SALES DEPARTMENT	10231	Sampson , Harry	CANADA	S.I.N.	999-999-999
SALES DEPARTMENT	5984	Sartre , Marv-Ellen	CANADA	S.I.N.	999-999-999
SALES DEPARTMENT	1027	Saunders , Carey	CANADA	S.I.N.	999-999-999
		Total Employees	15		

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

Time:	2:38:56 PM	Telephone Extension Report by Employee		RZINTTE1
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	78631	Adamson , Jennifer	Receptionist	
2201	1050	Armstrong-Smith , Grant	Chief Information Officer	to.jerryr@gmail.com
1200	1013	Brown , Thomas	Director, Human Resources	tbrown@abc.ca
2300	2028	Browning , Janice	HR Clerk	jbrowning@egea.ca
	5545	Darksey , Pat	Sales Manager	pdarkey@afdfe@ca
2205	1025	Davis , Celia	HR Clerk	cdavis@adfae.ca
	1865	Gillies , Catherine	Director, Human Resources	
1174	5001	Haile , William	Receptionist	whaile@fadfae.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	Wesslier , Johnaton	Programmer	sadfas@ddfasl.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
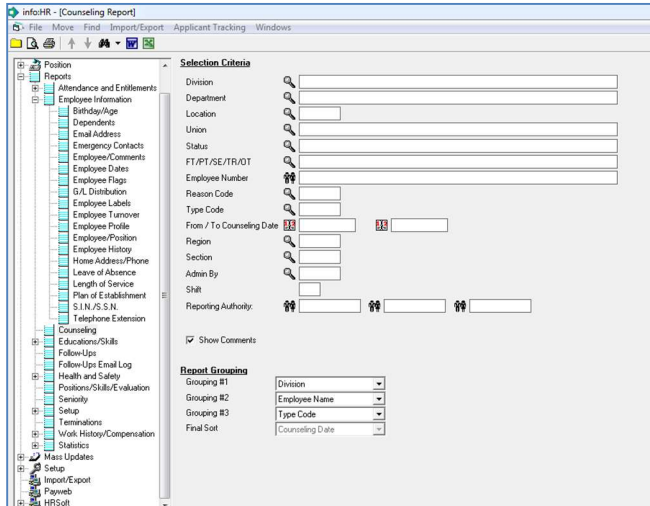
- **Reason code** allows the user to ask for a specific counselling reason, and only display results that match that reason code.
- **Type code** allows the user to ask for a specific type code, and only display results that match that type code.
- The report defaults to display comments if they are 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
Total for	Abbott, John		1		
1050 Armstrong, Bob sawing trees in public park	18/05/2006	18/05/2006	Verbal #1	Breach of green rules	Abbott, John
Total for	Armstrong, Bob		1		
1027 Saunders, Carey	07/03/2006		Verbal #1	Habitual lateness	
1027 Saunders, Carey	21/03/2006		Verbal #2	Habitual lateness	
Total for	Saunders, Carey		2		

Time: 8:14:31 PM
Counselling Report
No date entered

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.
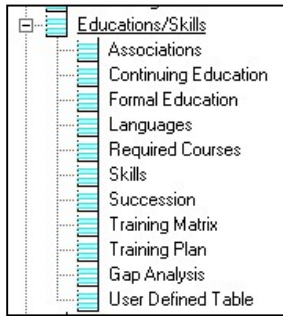
Screen Layout
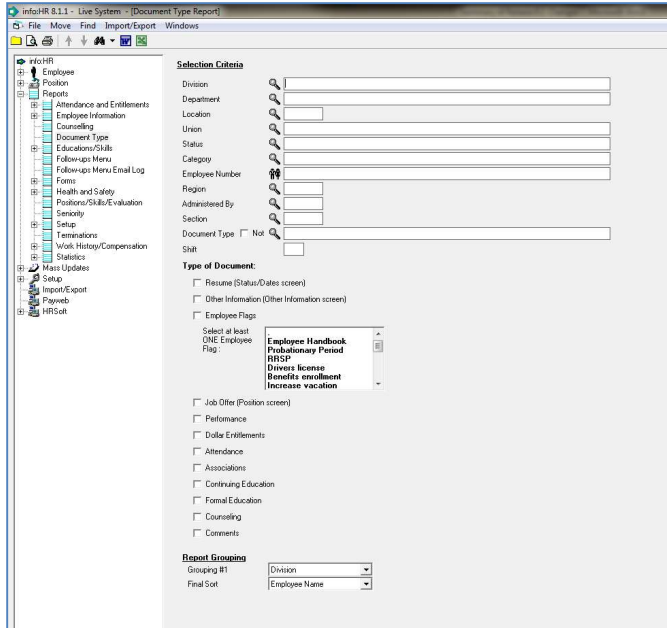
- To view if there are documents attached to a particular area of the system, check the screen where the documents are attached and select a document type code to view the existence of documents attached for employees.

- Items that contain a check box for "Not" - : If you want a report for employees that "don't" have the particular item, click on the "Not" in the selection criteria.
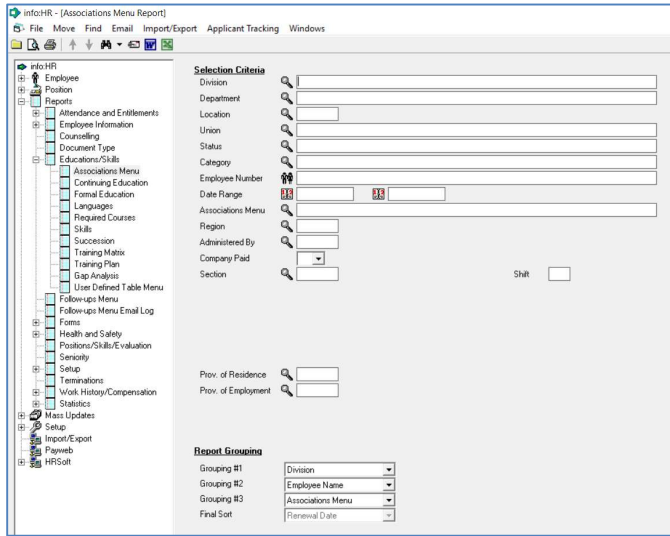
Sample Report

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

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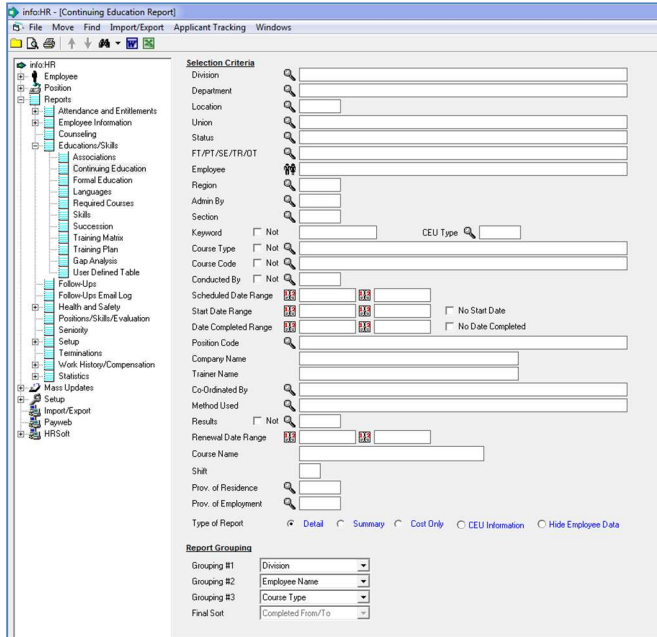
In comparison with other info:HR reports, this report's selection criteria are unique. There are many options that can be entered into the criteria to produce the desired information. Below is an explanation of how these options can be used.

- 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.

Sample Report – Detailed Education/Seminar Report

Time: 2:42:15 PM		Detailed Education/Seminars Report			RZESEM1

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
Smith , Jane			**Number of Courses:** 4		**Total Course Hours:**	**0.0**
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					RZESEM1S

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
Smith , Jane			**Number of Courses:** 4		**Total Course Hours:**		**0.00**
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		8/29/11		0.00
Browning , Janice	CPR	CPR Basic	Health & Safety	7/14/09	7/14/09	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
Browning , Janice			**Number of Courses:** 6		**Total Course Hours:**		**16.00**
Haile , William	GLOBAL STAFFING	Global Staffing 101	Administration		5/03/13		0.00
Haile , William	HR Practices	HR 101	Administration		11/03/12		0.00
Haile , William	CPR	CPR Level 1	Health & Safety		3/29/12		0.00
Haile , William	CPR	CPR Basic	Health & Safety		8/29/11		0.00
Haile , William	CPR	CPR Basic	Health & Safety	7/14/09	7/14/09	7/14/10	8.00
Haile , William	ABC of Learning 101	Learning 101	Professional Development		1/28/13		0.00
Haile , William			**Number of Courses:** 6		**Total Course Hours:**		**8.00**

Sample Report – Cost Only Education/Seminar

Time: 3:20:10 PM			Detailed Continuing Education Report - Costs Only					RZESEMC1

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 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 250.00 CDN
	EEO Reporting		6/01/15	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
	ABC of Learning 101	0.00	1/28/13	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 0.00	$ 0.00 CDN
		8.00	1/15/98	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN
Totals for:	**Adams , Karen**			**$0.00**	**$250.00**	**$500.00**	**$0.00**	**$0.00**	**$750.00**
Adamson , Jennifer	GLOBAL STAFFING	0.00	5/03/13	$ 0.00	$ 250.00 CDN	$ 0.00	$ 0.00	$ 0.00	$ 250.00
	HR Practices	0.00	11/03/12	$ 0.00	$ 0.00	$ 250.00 CDN	$ 0.00	$ 0.00	$ 250.00
	EEO Reporting	2.00	5/03/13	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 0.00	$ 0.00 CDN
	ABC of Learning 101	0.00	1/28/13	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 0.00 CDN	$ 0.00	$ 0.00 CDN
Totals for:	**Adamson , Jennifer**			**$0.00**	**$250.00**	**$250.00**	**$0.00**	**$0.00**	**$500.00**

Sample Report – CEU Information

Time: 8:59:34 AM			CEU Information			RZESEMCEU1T

Employee No. / Name		Course Description	Trainer Name	Date Completed	CEU Type	CEU Credit
11026	Abbott , John	HR Practices		8/22/11	Professional Development	0.20
		EMPLOYEE RELATIONSHIPS IN A CHANGING ENVIR				
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
		Course Description not Name				
11026	Abbott , John	CPR		2/05/14	Professional Development	2.50
	Abbott , John	**Number of Courses** 4			**Total CEU Credit:**	**4.20**
		Number of Employees 1				
3011	Abel , Samantha	ABC of Learning 101	Jerry	7/31/14	Professional Development	2.00
	Abel , Samantha	**Number of Courses** 1			**Total CEU Credit:**	**2.00**
		Number of Employees 1				
	Grand Totals:	**Number of Courses: :** 5			**Total CEU Credit:**	**6.20**
		Number of Employees: 2				

Sample Report – Hide Employee Data

Course Code	Course Type	Date Completed	Course Hours	Employer	Employee	Other	Total	# of Employees
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	06/25/2010	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	08/24/2011	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
HSO	HS	05/24/2011	0.00	$0.00	$0.00	$0.00	$0.00	1
HSO	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
Grand Total:			$106.00	$5,620.00	$0.00	$3,500.00	$9,120.00	15

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
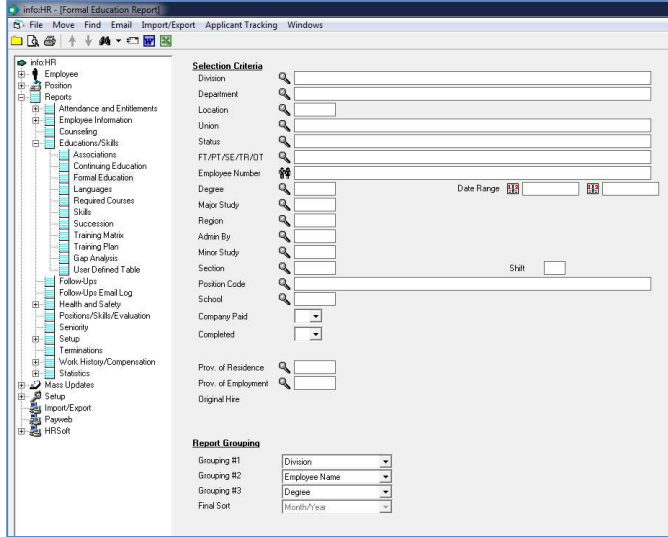
- The report can be generated asking for one degree by selecting one from the **Degree** lookup.
- The report can be generated asking for one major study by selecting one from the **Major of Study** lookup.
- The report can be generated asking for one minor study by selecting one from the **Minor of 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	Comp-leted	Year	Degree Obtained	Compa-ny
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
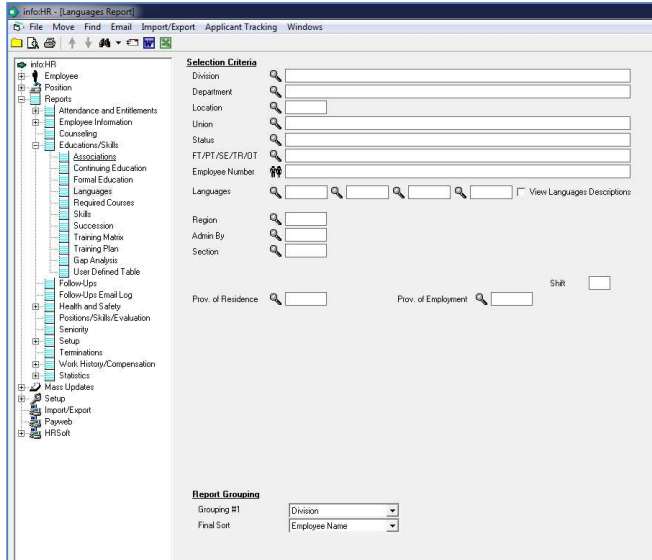
- To generate the report asking for a specific language, select the language from the lookup. Up to 4 languages can be selected at once.
- To generate the report with all languages listed, leave Languages blank.

Sample Report

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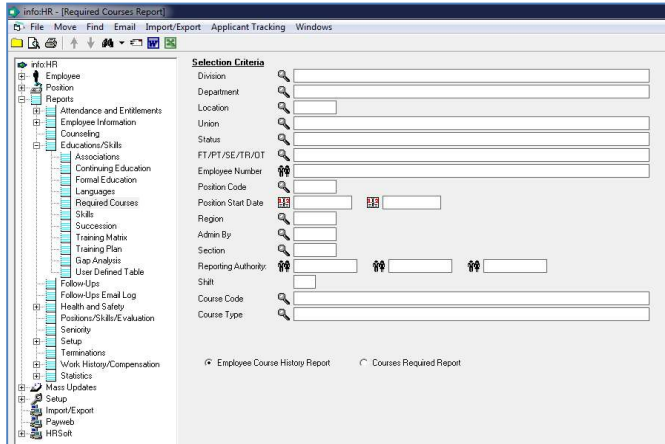
- Using the **Employee Course History Report** selection you will be able to view the courses completed, the date they were completed, and a renewal date.
- Using the **Courses Required Report** selection you will be able to view the courses required as of the Renewal Date.

Sample Report - Employee Course History Report

Sample Report - Course Required Report

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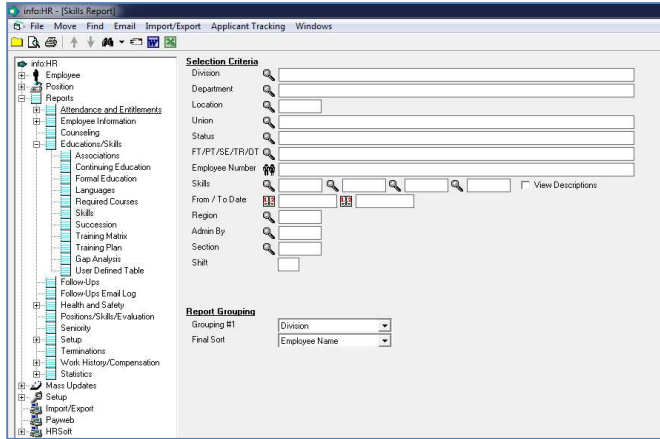
- To generate this report to display employees with specific skills, select up to four skills from the **Skills** lookup.
- The From/To Date will allow the user to specify a time frame in which the skill was acquired.

Sample Report

Succession

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

Screen Layout
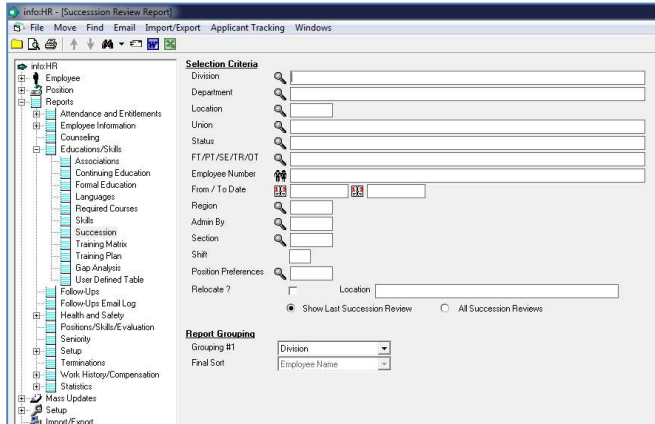
- Using the **Position Preferences** you will be able to view plans of employees who have shown interest in a specific position.
- When **Relocate?** Is checked you will see employees who will relocate. You may enter a **Location** to view employees who will relocate to a specific location.
- When **Show 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

Sample Report – All Succession Reviews

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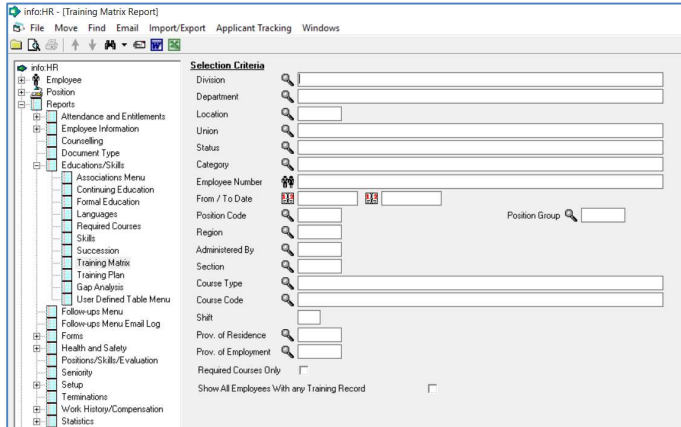
- To view all employees check the **Show All Employees** box.
- To view only required courses check the **Required Courses Only** box.

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					
							AI	B	CPR	HT	INFO	ORI
							Advanced I	Budget for	CPR	Hiring/Term	Intro to INF	Company C
							R			R	R/L	R
1001	ACCT	5001	Haile,William	RECEPTIONIST		30/06/1992	16/01/2006	N/A	N/A	N/A	N/A	N/A
1001	FINADMN	1050	Armstrong,Bob	DIRECTOR, HUMAN RESOURCES	2C	10/03/1994	03/06/2006	31/12/2009	31/05/2011		N/A	02/02/2011
1001	SALE	1013	Brown,Thomas	FINANCE & ADMIN. MANAGER		30/06/1988	16/01/2006	N/A		N/A		17/01/2006
1001	SALE	1012	King,Deborah	DIRECTOR, HUMAN RESOURCES		25/05/1985		N/A	N/A		N/A	N/A
2000	ACCT	1051	Adams,Karen	ACCOUNTS PAYABLE CLERK		02/01/2000	09/08/2010	N/A	N/A	19/11/2010	15/01/1998	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
3000	ADMN	5000	Haile,Jenny	TELESALES REPRESENTATIVE		06/01/1993	N/A	N/A	N/A	N/A	N/A	N/A
6000	FINADMN	221026	Abbott,John	President	MISS	01/02/1992	19/01/2006	N/A	N/A	N/A	19/01/2006	N/A
6000	FINADMN	1014	Anderson,Dane	HR CLERK		03/08/1989		N/A	N/A	N/A	N/A	N/A
6000	SALE	5984	Sartre,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
ABC	HR	1053	Mansglebe,Jayne	HR CLERK		01/01/1982		N/A	N/A	N/A	N/A	N/A
ABC	SALE	2210	Drac,Jeri	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
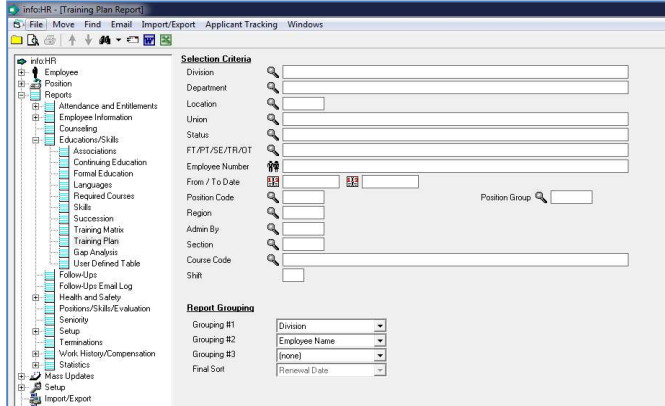
- To view only specific course use the **Course Code** selection criteria to enter only the courses you wish to view.

Sample Report

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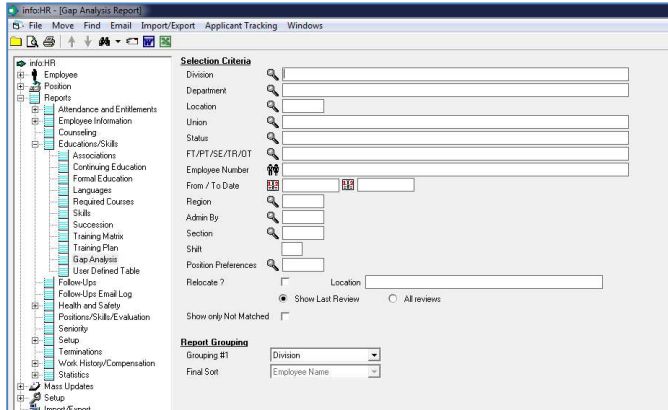
- If "Position Preferences" has a Position Code entered, the report only prints an employee who has the matching Position Code in their Position Preferences.
- If "Show only Not Matched" is checked, only Course Codes that haven't been taken will appear on the report.

Sample Report

Time: 8:39:55 PM		Gap Analysis Report		RZGapAnalysis1
Employee Name	Position	Position Preference	Position Requied Skills	Employee Match/Not Match
Armstrong , Bob	FINANCE & ADMIN. MANAG			
		DIRECTOR, HUMAN RESOUR		
			HR GENERALIST EXPERIEN	No
			INFO:HR EXPERIENCE	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

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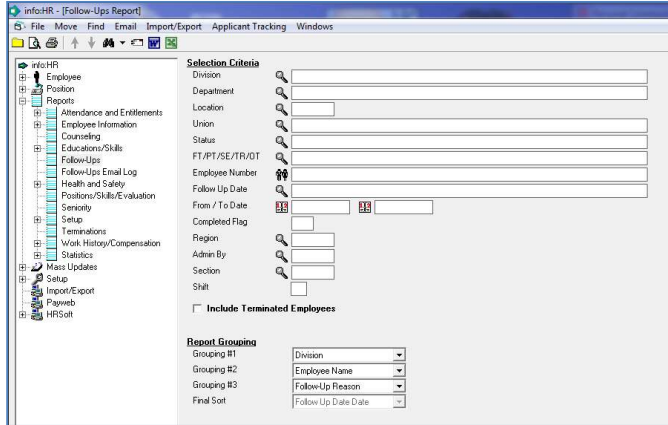
- You can use the **Complete Flag** to select either completed follow-ups by entering a **"Y"** or incomplete follow-ups by entering a **"N"**
- If you wish to view terminated employees on the same report check the **Include Terminate Employees** check box.

Sample Report

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
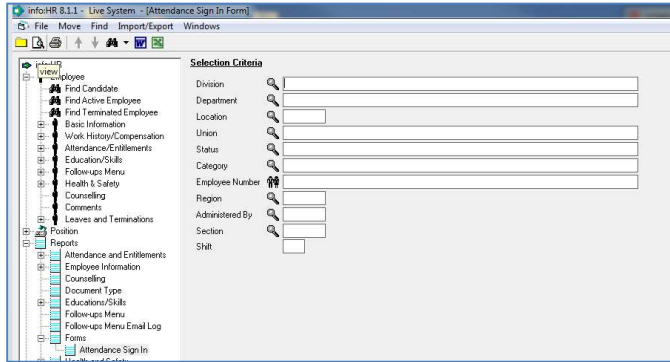
Forms
Attendance Sign In

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

Screen Layout

Sample Report

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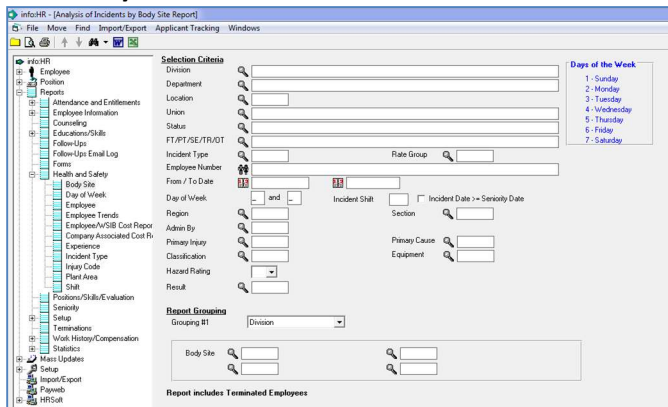
- The Selection Criteria allows you to enter up to **4 Body Site** codes for reporting on.
- Use **Day of Week** to report on selected days of the week.

Sample Report

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

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

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

Employee/WSIB Cost Report

This report details the WSIB Costs for each employee according to the options selected. Totals are calculated and displayed for each Claim and Employee. A Grand Total is calculated and displayed at the end of the report.

Screen Layout

- In this report, the user has the ability to include or exclude terminated employees based upon the check box **Include Termination**.
- Selecting **Detail** report type will provide break down by Claim #, employee and cost type. Select **Summary** to view costs listed by type.

Sample Report - Detailed

Sample Report - Summary

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

Sample Report - Summary

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
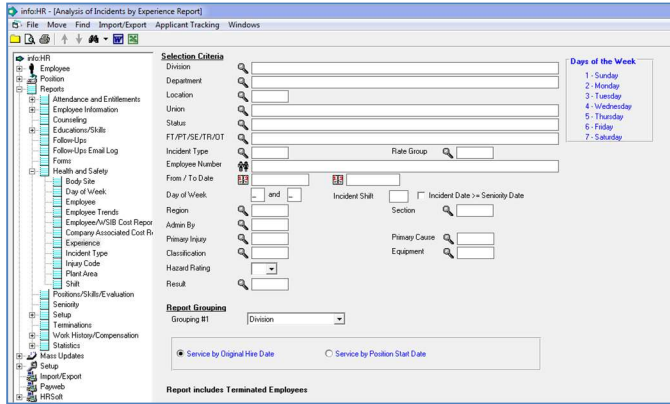
Sample Report

Length of Service	Type of Injury	Quantity	% of Length	% of Total
		6	75.00	10.7
	Abrasions, Cuts, Lacerations o	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

Total Number of Incidents: **56**

Incident Type

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

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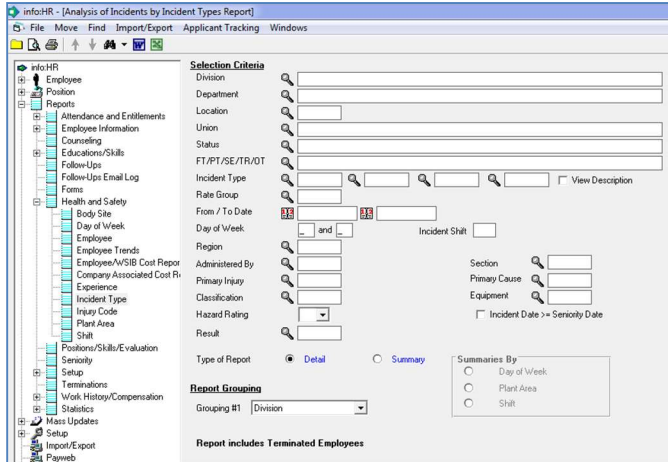
- Select Detail to view an analysis report of all incidents in the system.
- Select **Summary** to view a summary report ordered by incident by **Day of Week**, **Plant Area** or **Shift.**

Sample Report

Sample Report – Summary - Day of Week

Sample Report – Summary – Plant Area

Time: 11:44:43 AM		Analysis of Incidents by Incident Type			RZINTPEA
		Summary by Plant Area			

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		

Plant Area	Quantity	% in Plant Area
	7	53.85%
BASEBALL FIELD	1	7.69%
BATTLEFIELD	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			RZINTPES
	Summary by Shift			
				13

Incident Type:	FIRST AID	% of Total Incidents:	52.00	Number of Incidents:
From-To Date: 4/29/92 9/09/11	Total Number Incidents:	25		

Shift	Quantity	% by Shift
	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
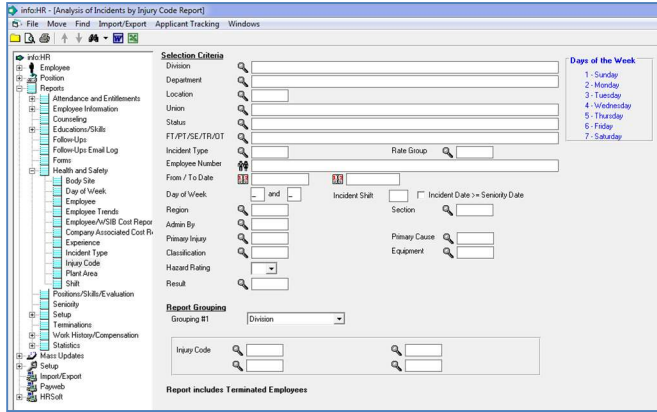
- Enter up to four **Injury Codes** for generating Injury code - specific reports.

Sample Report

Plant Area

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

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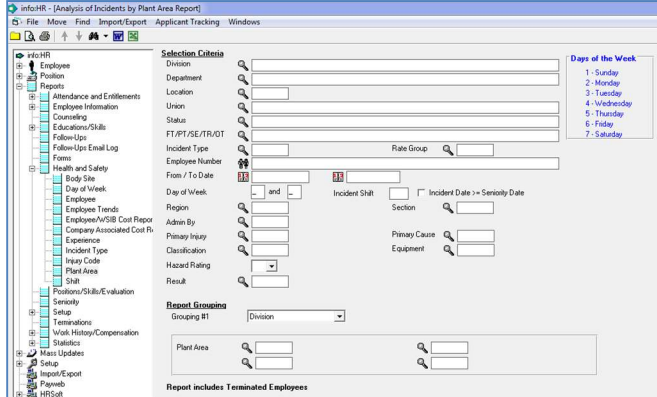
- Enter up to four **Plant Area** codes for generating Plant Area - specific reports.

Sample Report

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

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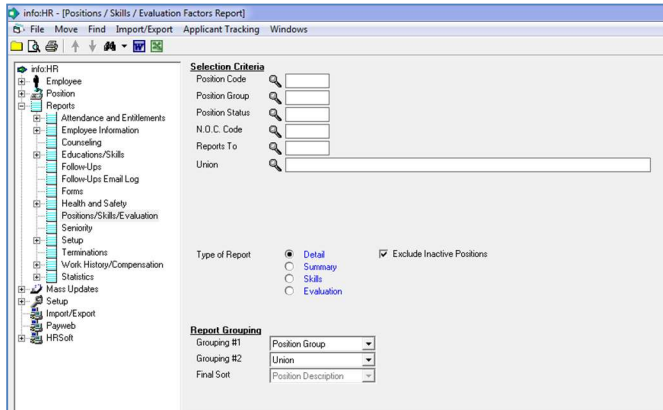
The report can be printed in detail or summary. A detail report is one page per position.

- 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

Sample Report – Summary

Time: 2:00:26 PM				Summarized Position Master Report						RZPOSMTS

Position Code	Description	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	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	0.00
BP	Benefits & Pension Admin	FT	MGMT	NON	58.00		2.00	1.50	0.00	3,000.00	0.00
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

Time: 2:01:14 PM					Position Skills Report				RZPOSSKL

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

Time: 2:02:49 PM					Position Evaluation Report						RZPOSEVL

Position Code	Description	Status	Group	Union	Evaluation Factor	Level	Sub-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	
					Grand Total:				3,059.00	

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 calculated 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.

Sample Report – Original Hire Date

Time:	9:07:10 PM		Seniority Report by Original Hire Date as of April 09, 2013		RZSENDO2

Union	Number	Name	Position	Original Hire Date	Years of Experience
NON-UNION	1053	Mansglebe , 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	Sartre , 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	1231	Sampson , Harry	Receptionist	12/01/90	22.47
	5506	Smith , Jane	Developer	1/01/91	22.39
	1052	O'Brian , RONALD	MIS 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	Darksey , 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		RZSENLS2

Union	Number	Name	Position	Last Hire Date	Years of Exper.
	1052	O'Brian , RONALD	MIS 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		RZSENUN1

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

Sample Report - Seniority Hours

Time: 7:12:16 PM			Seniority Report by Hours as of May 16, 2013			RZSENHR2
Union	Number	Name	Position	Original Hire Date	Total Hours	Length of Service
	1052	O'Brian, RONALD	MIS Director	06/01/1991	265.00	21.97
Non Union	1021	Selby, Murray	AR Clerk	01/01/1995	123.00	18.38
Company Association	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
	8524	Wesslier, Johnaton	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	Adamson, 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	MIS 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		RZSENUS2
Department	Divisio	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	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
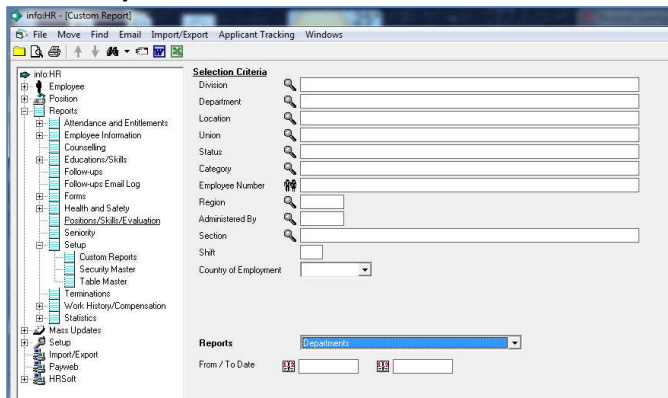
Security Master

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

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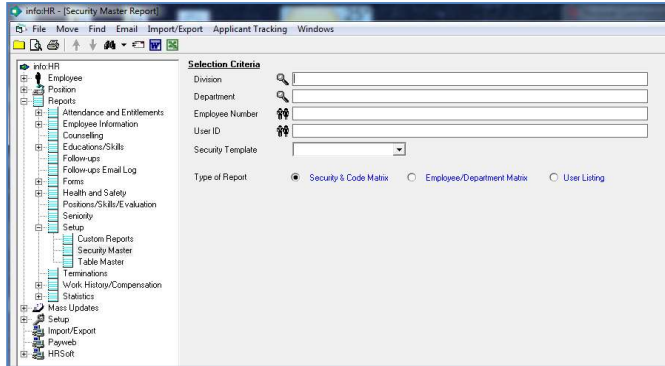
- To view a report for a **Security Template** select it from the drop down.
- Select **Security & Code Matrix** if you require a report of what screens and codes the selected user has access to.
- Select **Employee/Departments Matrix** if you require a report listing the Employees and Departments selected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

Sample Report – Security & Code Matrix

Sample Report – Department Matrix

Sample Reports – User Listing

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.

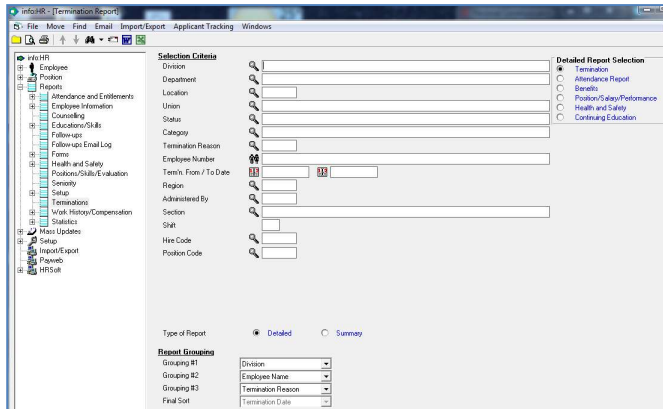### Screen Layout

Sample Report

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 – p**rovides 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

Basic Employee Information

Employee: 2210   Ms. Jones , Jenny   Payroll ID:

Division:	LA	Department:	SALE Sales
Location:		G/L#:	
Section:			
Address:	50 South Service Road	Unit 21	
	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:

Banking Data

Deposit	Bank	Branch	Account Number	Amt. Deposit	% Deposit
				0.00	0.00
				0.00	0.00
				0.00	0.00

TD1 Amount:	$7412.00	TD1 Code:	0	Supervisor Code:	
Extra Tax:	$25.00	Vacation %:	0.12%	Pension Code:	
UIC 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
Totals by Attendance Reason:		45.50	5.69
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
Totals by Attendance Reason:		33.00	4.13
Lieu Earned	7/02/96	8.00	1.00
Totals by Attendance Reason:		8.00	1.00
Lieu Taken	7/03/96	1.00	0.13
Totals by Attendance Reason:		1.00	0.13
PT Stat Earned	1/01/10	0.00	0.00
	9/16/10	2.80	0.35
Totals by Attendance Reason:		2.80	0.35
PT Stat Taken	9/24/10	1.00	0.13
Totals by Attendance Reason:		1.00	0.13
Statutory Holiday	1/01/96	8.00	1.00

Sample Report – Detailed Benefits

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

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

POSITION DATA	SALARY DATA	PERFORMANCE DATA
Position: Sales Manager		
Start Date: 1/15/90		
Reports To:		
Reason for Change: NEWH		
FTE Per Yr.:		
	Effective Date: 1/01/00	Reports To:
	Salary/Grade/Code: 44,601.73 11 A	Performance Rating: GOOD Good
	Compa: 116.58	Date Reviewed: 6/30/96
	Reason: Cost of Living Adjustment	Next Review: 6/30/98
	% 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 Date:	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

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	81,249.00 A	40.00	81,249.00
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			Hours	Days
Employee	Jones , Jenny			
	Termination Date	4/21/11	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.	Cost of Benefit Employee	Company	Total
2210 Jones , Jenny	401k Contribution		0.00	1/15/90	0.00	100.00	$0.00	$0.00	$0.00
	Dental	F	0.00	4/15/90	0.00	100.00	$0.00	$875.00	$875.00
	Extended Health Care	F	0.00	4/15/90	0.00	100.00	$0.00	$2,200.00	$2,200.00
	Extended Health Care		0.00	4/15/90	0.00	100.00	$0.00	$250.00	$250.00
	Life		204,000.00	9/14/09	20.00	80.00	$41.62	$166.46	$208.08
	LTD		2,334.50	7/15/90	0.00	100.00	$0.00	$966.48	$966.48
				Grand Totals -			$41.62	$4,457.95	$4,499.56

Work History/Compensation

Below are the reports included in this section:
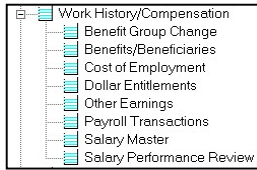
Benefit Group Change

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

Screen Layout

Sample Report

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.

Sample Report – Detailed

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

Sample Report - Summary

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

		Benefit	**Taxes**	**Total**
Totals : Adams , Karen	Employee:	$85.3902	0.0000	85.3902
	Company:	$293.0300	0.0000	293.0300
	Total:	$378.4200	0.0000	378.4202

Sample Report – Beneficiary

Time: 12:31:50 PM		Beneficiary Master Report				RZBNFTDB
Division	Central Branch					
Employee Name	**Benefit**	**Beneficiary Name**	**Relationship**	**Percent**	**Birth Date**	
Armstrong-Smith , Grant	Life	Cosmo 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
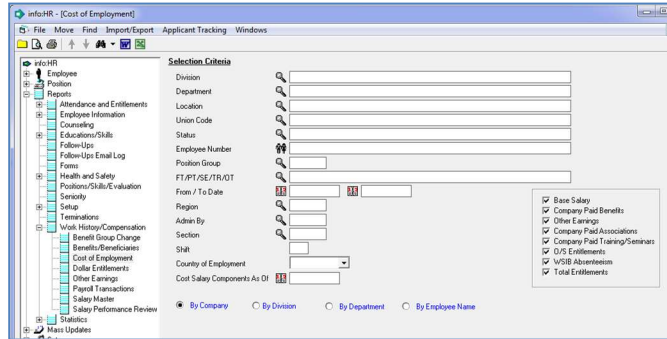
- Use the **Company**, **Division**, **Department** or **Employee Name** option to generate a one-page summary of the investment in human resources selected criteria.
- Enter the **From/To** to control the costs that show up in Group B of the report. If looking at an annual cost of employment, you want 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.

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%
	Total of Group "A"		$1,062,216.13		73.64%
B	Company Paid Associations		$3,400.00	18.72%	0.24%
	Company Paid Training/Seminars		$14,764.00	81.28%	1.02%
	Total of Group "B"		$18,164.00		1.26%
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%
	Total of Group "C"		$361,977.48		25.10%
	Total of Groups "A", "B" & "C"		$1,442,357.61		
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%	
	Total of Group "D"		$421,243.96		

Sample Report - By Division

Time:	12:38:09 PM	Cost of Employment by Division		rzcost2

Division: West Coast Branch

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%
	Total of Group "A"		$279,583.56		93.32%
B	Company Paid Associations		$500.00	35.36%	0.17%
	Company Paid Training/Seminars		$914.00	64.64%	0.31%
	Total of Group "B"		$1,414.00		0.47%
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%
	Total of Group "C"		$18,610.82		6.21%
	Total of Groups "A", "B" & "C"		$299,608.38		
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%	
	Total of Group "D"		$29,706.77		
	Total of Groups "A", "B" & "D"		310,704.33		

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%
	Total of Group "A"		$133,445.96		95.00%
B	Company Paid Associations		$500.00	35.36%	0.36%
	Company Paid Training/Seminars		$914.00	64.64%	0.65%
	Total of Group "B"		$1,414.00		1.01%
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%
	Total of Group "C"		$5,605.28		3.99%
	Total of Groups "A", "B" & "C"		$140,465.24		
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%	
	Total of Group "D"		$13,907.44		
	Total of Groups "A", "B" & "D"		$148,767.40		

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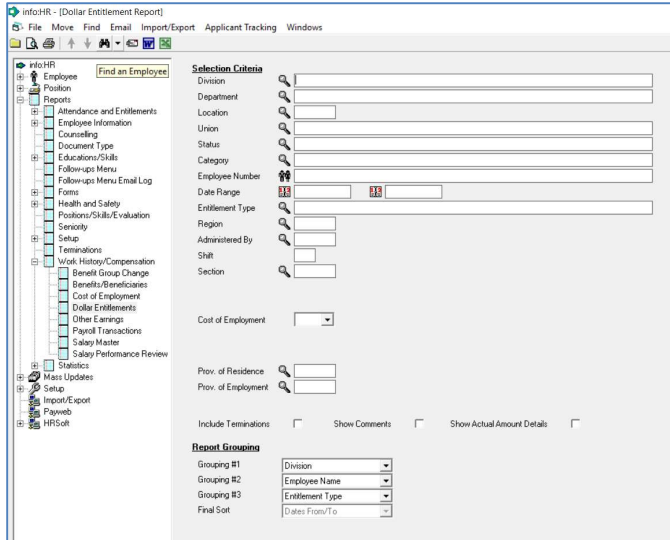
- Select Y or N to show **Cost of Employment** or leave blank to show both.
- **Include Terminated** will include terminate employees.
- **Include Comments** will show comments associated with Entitlements.

Sample Report

Sample Report – Show Actual Amount Details

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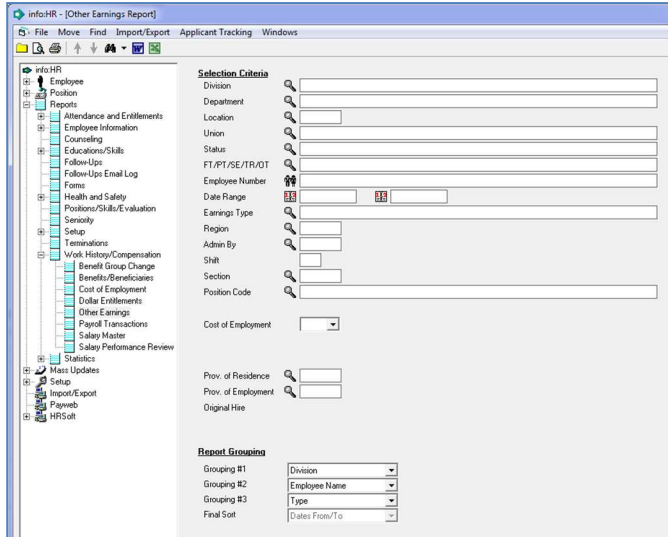
- **Cost of Employment:**
    - Select Y to only print Other Earnings record that have their COE Flag = "Y".
    - Select N to only print Other Earnings record that have their COE Flag = "N".
    - Leave blank to show all records.

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	Bonus from the sales department in getting the PO processed for end of quarter.
1050 Armstrong , Bob	RECOGNITION AWARD		01/06/2006 01/06/2006	2,500.00	Y	Innovative HR practices over the last several years.
1013 Brown , Thomas	Bonus		01/01/2013 31/01/2013	0.00	N	
1053 Mansglebe , 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	OVERTIME * 1.5		01/01/1995 31/12/1995	52.50	Y	
		Selection Totals -		4,312.50		

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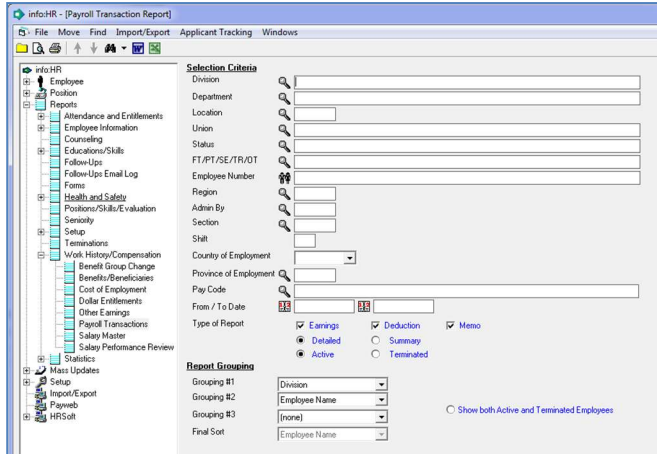
- To view the **Earnings, Deductions** or **Memos** use the check boxes to select each.
- This report can be viewed in **Summary** or **Detailed** format.
- You may also select **Active** or **Terminated** employees.

Sample Reports - Detailed

Sample Report – Summary

Salary Master

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

Screen Layout

- 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.

Sample Report – Current Salary

Sample Report – Current Position

Sample Report – Salary History

Sample Report - Position History

Sample Report – As of Date Salary

Sample Report – As of Date Position

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.

- **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:

    - 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.

Sample Report – Detailed

Time: 8:53:50 AM	Salary & Performance Review Report			RZSAL PDT

Employee Nbr/Name | Position | Start Date | Salary Information | Effective
11026 Abbott, John | Chief Information Officer | 2/01/00 | 110,000.00 A 01 4/01/11

Division: West Coast Branch | Department: Cal Regional Office

Employment Status: A | FT | Union: NON
Original Hire Date: 3/15/89 | Employee Type: 1 | Seniority Date: 3/15/89

Next Salary Review: | Next Performance Review:

Position Information | Group Code: ADMN | Total Points: 3 | FTE: | Mid-Point: 3
| Status: MGMT | Nbr of Positions: 1 | FTE Hrs/Yr:

Grid Steps - 01: 111,375.00 05: 0.00 09: 0.00
02: 141,750.00 06: 0.00 10: 0.00
03: 162,000.00 07: 0.00 11: 0.00
04: 0.00 08: 0.00

Complete the Information Below | This Employee Reports To | John Abbott

Position Data -

New Position Code: _____ New Start Date: _____

New Reports To: _____

Reason For Position Change: _____

Hours Per - Day: _____ Week: _____ Pay Period: _____ Shift: _____

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 Salary	Performance	Last Performance Rating
221026 Abbott, John	President	96,140.00/A	27/01/2006		01/08/2009	
1051 Adams, Karen	ACCOUNTS RECEIVABLE CLERK	100,000.00/A	01/12/1994		01/12/1995	GOOD PERFORMANCE
1014 Anderson, Dane	HR CLERK	41,497.11/A	14/12/1993		14/12/1994	GOOD PERFORMANCE
1050 Armstrong, Bob	DIRECTOR, HUMAN RESOURCES	81,000.00/A	02/03/2012		01/03/2013	GOOD PERFORMANCE
1013 Brown, Thomas	FINANCE & ADMIN. MANAGER	40,272.54/A				
2210 Drac, Jeri	SALES MANAGER	43,200.00/A	30/06/1996		30/06/1998	GOOD PERFORMANCE
5000 Haile, Jenny	TELESALES REPRESENTATIVE	28.00/H				
5001 Haile, William	RECEPTIONIST	26,818.00/A			13/12/2011	
1054 Harper, Betsy	Office Administrator	15.00/H				
1012 King, Deborah	DIRECTOR, HUMAN RESOURCES	100,000.00/A	01/01/1996		01/01/1997	GOOD PERFORMANCE
1052 Mansfield, Katherine	HR CLERK	31,372.00/A				
1053 Mansglebe, Jayne	HR CLERK	20,240.00/A				
10231 Sampson, Harry	SALES REPRESENTATIVE	35,101.90/A	28/09/1999		29/09/1999	
5984 Sartre, Mary-Ellen	BRANCH MANAGER	47,424.47/A	22/03/1999		15/06/2000	GOOD PERFORMANCE
1027 Saunders, Carey	SALES REPRESENTATIVE	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:
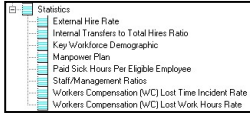
Report Grouping is very important in this section. When a Report Grouping #1 is selected the report will give a summary statistic for the selection for that grouping. For example, if the Report Grouping #1 is set to Division the report will show totals for each Division and an Organization Summary at the bottom of the report.
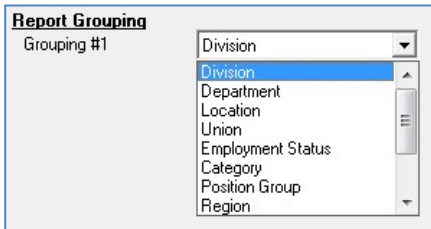
Sample Report – Report Grouping Division

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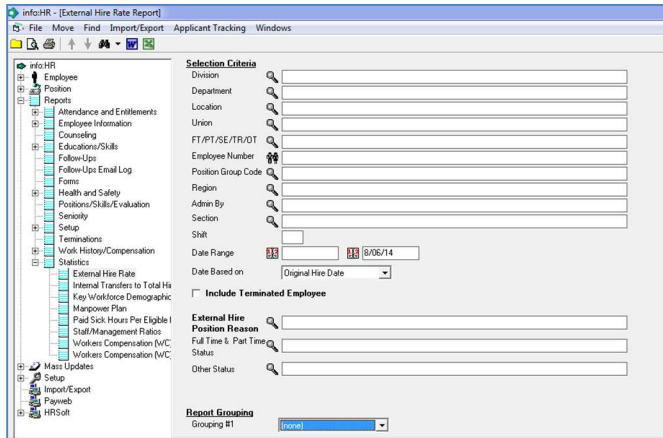
- This report is viewed by **External Hire Position Reason** Codes or **Employment Status** codes. A code must be entered in these selection criteria.

Sample Report

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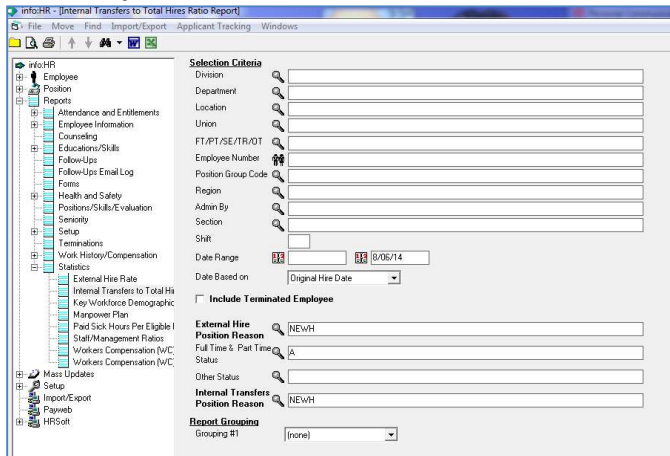
- This report is viewed by **External Hire Position Reason** Codes, **Employment Status** codes and Internal **Transfers Position Reason** code. A code must be entered in these selection criteria.

Sample Report

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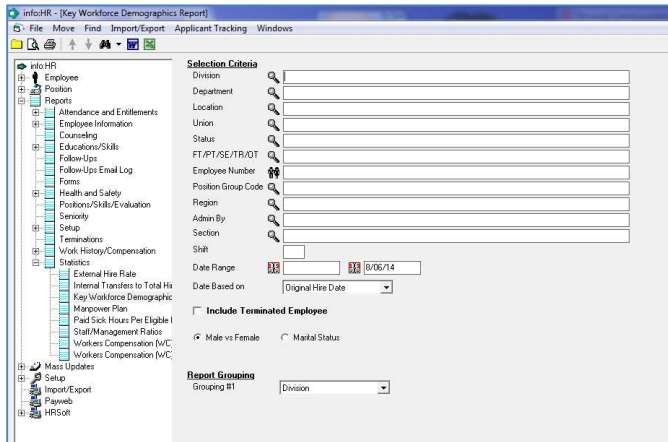
- **Male vs Female** selection shows the percentage of Male vs. Female based on the total number of employees.
- **Marital Status** selection shows the percentage of each status code in comparison to the total number of employees.

Male vs Female – Report Grouping Division

Time: 2:23:20 PM   Employee Gender Breakdown Percentage Report   rzpopag1

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

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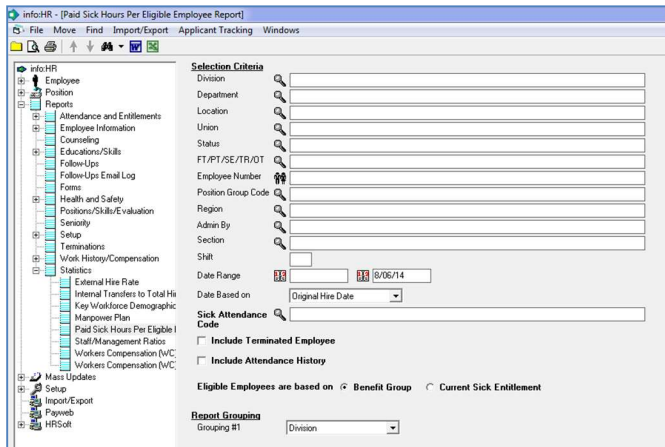
Screen Layout
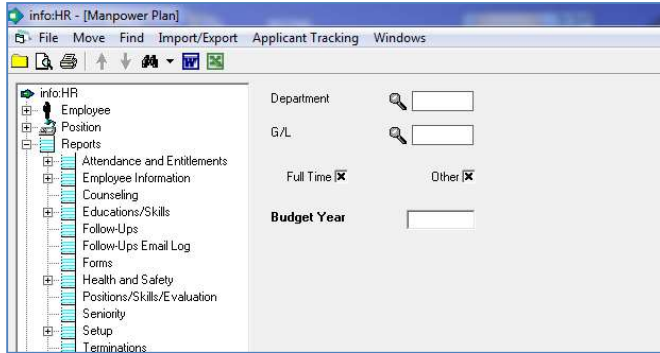
- To view Full Time requirements check **Full Time,** check **Other** to view requirements such as part time or contract.
- Enter the **Budget Year** you wish to view.

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) | |

Paid Sick Hours:	712.00		Total Employees:	18
Average Eligible Employee-Count:		10.00	Paid Sick Hours Per Eligible Employee:	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) | |

Paid Sick Hours:	32.00		Total Employees:	18
Average Eligible Employee-Count:		14.00	Paid Sick Hours Per Eligible Employee:	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.

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

Sample Report

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.
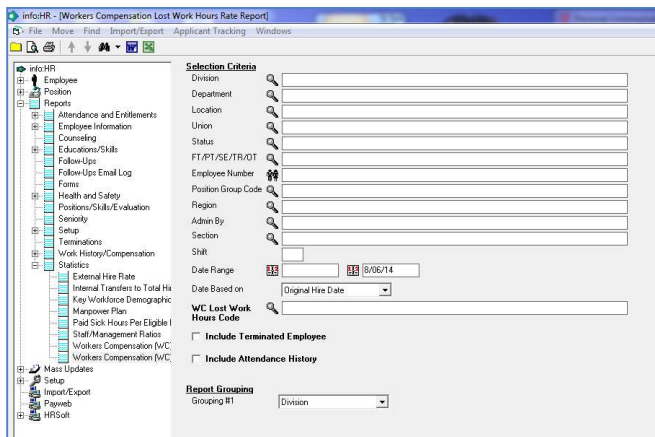- If you would like to **Include Attendance History** check the box.

Sample Report

Workers Compensation (WC) Lost 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