



uOttawa

L'Université Canadienne  
Canada's University



## User Manual

***FastHR***

(Version 1.1)  
Last Update: February 22, 2011

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# Table of Content

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Changes from version 1.1 of the guide .....	1
Introduction to FastHR .....	1
Exporting data into Excel .....	1
Confidentiality of information .....	2
Users' responsibilities .....	2
Requesting access to FastHR .....	2
Starting a FastHR session .....	3
Security in FastHR .....	5
Why is FastHR called a "data warehouse?" .....	6
Data sources for the various FastHR reports .....	6
EMPLOYEES tab reports .....	7
JOBS tab reports .....	10
POSITIONS tab reports .....	12
PAYROLL tab reports .....	14
Les rapports de l'onglet FACULTY .....	15
Navigating in FastHR .....	16
FastHR terminology .....	17
Primary menu tabs .....	17
FastHR toolbars .....	17
Modifying your user profile .....	23
Saving a report using "Save as Pinned Report" .....	25
Saving report options using Save as Pinned Report .....	25
Executing a report from the "Pinned Reports" section .....	27
Exporting a pinned report into Excel or PDF format .....	28
Deleting a report from the Pinned Reports section .....	29
Moving a pinned report into the My Favorite Reports section .....	31
Online contextual help .....	31
PAGE NOTES icon .....	32
Various filters in FastHR .....	33
Emptying the existing filters .....	40
Exporting reports into Excel .....	41
Executing a report in FastHR .....	41
Modifying a report after execution .....	42
Viewing data before exporting it into Excel .....	44
Enlarging the report display .....	45
Modifying the number of rows displayed on the screen .....	48
Creating custom filters .....	49
Additional information in reports .....	53
Exporting data into an Excel file .....	56
Saving a file in Excel format .....	56
Examples of reports generated with FastHR .....	59
What data can be extracted from the various FastHR reports?? .....	59
Data dictionary .....	63
Faculty or service employee list with home addresses .....	81
List of employees over (for example) age 50 .....	84
Employee list by home department (HOME DEPARTMENT ORG) .....	88

---

# Table of Content

---

Report on contract end dates .....	91
List of regular employees having left the University between January 1 and December 31, 2008 .....	95
List of a faculty's regular employees with 25 or more years of seniority .....	96
List of regular support positions that are vacant .....	99
Report on earnings received by one or more employees .....	101
List of all single positions of your faculty/service .....	103
List of PCLASS codes .....	105
List of employee email addresses .....	108
Producing an org chart .....	110
Quit FastHR .....	123
Exercises of the Human Resources Reports and Data Interpretation course .....	123

## Changes from version 1.1 of the guide

*NOTE: This section of the guide contains the list of changes done to the FastHR user guide version 1.0.*

- 1) The section titled Producing an Org Chart was added.
- 2) Minors corrections were done in the Exercises of the Human Resources Reports and Data Interpretation course section.

## Introduction to FastHR

This users' guide was created as a reference tool in your daily use of FastHR.

An up-to-date version of this guide in Adobe Acrobat (PDF) format may be viewed on the Human Resources Service website and downloaded. Simply go to <http://www.hr.uOttawa.ca/forms/manager/documentation.php>.

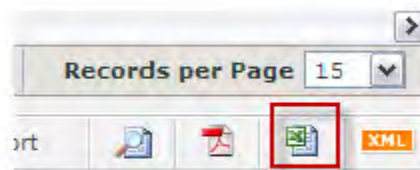
You are invited to share your comments and questions with us. Please email [lynne.bouchard@uottawa.ca](mailto:lynne.bouchard@uottawa.ca).

## Exporting data into Excel

FastHR allows you to export your reports into Excel so they can be handled as needed. All FastHR reports may be exported into Excel. The following icon



indicates whether it is possible to export your data into Excel. Check for the icon at the bottom of the report screen. The following illustration indicates where to find this icon.



Since FastHR makes it easy for you to export your files into Excel, make sure to save your Excel files in a secure folder. If you export them into a network folder that your coworkers can access, you are sharing information that should possibly remain confidential.

## **Confidentiality of information**

FastHR contains very confidential employee information. You have access to their biographical information (birth date, home address, etc.), earnings and salary deductions.

## **Users' responsibilities**

All University of Ottawa employees performing administrative duties must comply with the following rules, namely to:

- 1) respect the confidentiality of the information received in the performance of their duties and avoid using it for personal purposes,
- 2) maintain the confidentiality of their computer passwords and avoid disclosing them to anyone, under any circumstances,
- 3) only access the accounts assigned to them by the University and respect all related restrictions.

## **Requesting access to FastHR**

For now, access to FastHR is only granted to those who have taken the requisite training. The form for requesting access to FastHR is available on the Human Resources home page in the section FORMS FOR

ADMINISTRATORS AND MANAGERS. Its exact name is REQUEST FOR ACCESS TO HR/PAY SYSTEM; it is reproduced below.



The screenshot shows a web interface for Human Resources Forms. The top navigation bar includes 'Human Resources >>' and 'Forms >>'. A 'PRINT' button is visible in the top right. A left sidebar contains a menu with 'Home >>', 'For employees >>', and 'For administrators and managers >>'. The main content area is titled 'For administrators and managers' and features a list of links: 'Important procedures', 'Payroll calendars', 'Fusion/PRE Documentation', 'Request for access to Systems' (highlighted with a red box and a mouse cursor), and 'Request for recruitment'. To the right, there are two informational boxes: 'Confidentiality' with a 'CONFIDENTIAL' stamp and text about personal information policy, and 'Restricted Access' with a padlock icon and text about intranet availability.

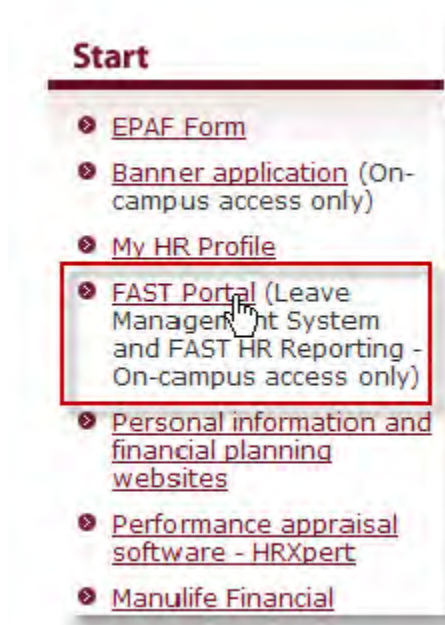
## Starting a FastHR session

Procedure for starting a FastHR session

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1. Open your browser (Internet Explorer).
2. Go the Human Resources Service home page.

3. Click on Fast Portal.

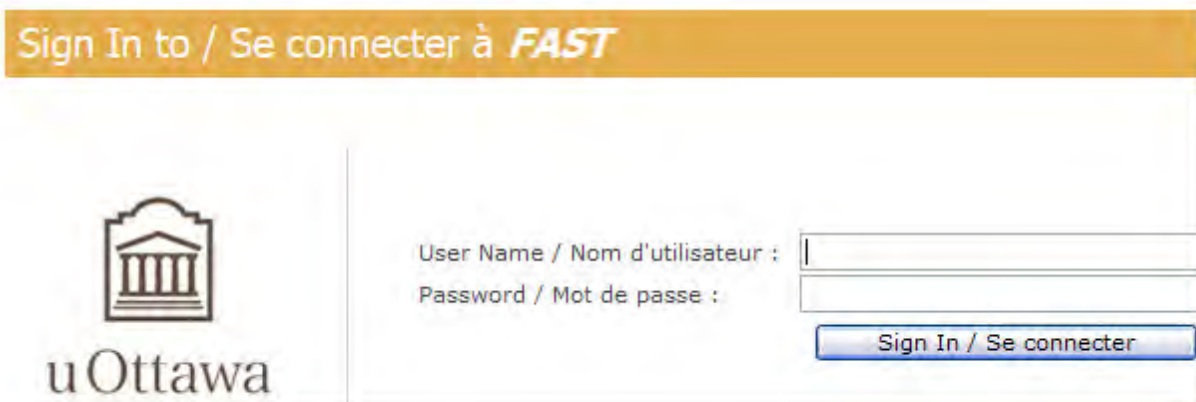


Your user's name starts with an upper case E, followed by your employee number without the "100" that precedes it.

Example: Alexander's employee number is 100012345. His user name in Fast Portal is therefore upper case E + employee number (without the initial 100), i.e. E12345.

Your password is the password you use to access InfoWeb (in upper case)\*.

4. Type your user name.
5. Type your password.
6. Click on CONNECT.





7. Click on Human Resources Reporting.



**NOTE:** The position you currently hold determines whether you have access to more than one application when accessing Fast Portal. You may also have access to Finance Reporting, Human Resources Reporting, WebfocusHR, WebfocusFinance and Leave Management.

You only have to enter your user code and password once to be automatically connected to all the applications to which you have access.

## Security in FastHR

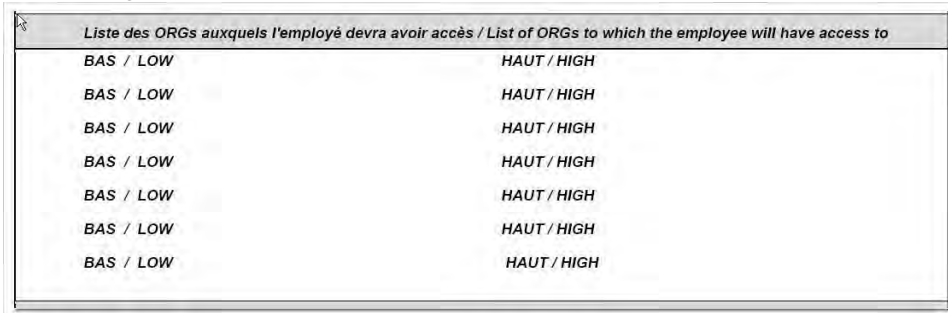
Security and access to information in FastHR are determined by the various “orgs” to which you have access and the role you were assigned when your FastHR access account was created. Two types of user roles currently exist. There is a role for centralized users, such as the employees of the Human Resources Service, and a role for the decentralized users, who are primarily people in the University’s faculties and services responsible for validating the pay report.

The role you were assigned thus depends on the position you hold. Here is the section of the request for access form you will have to complete to obtain access to FastHR.



Accès aux données de FAST-RH / FAST-HR Data Access	
<input type="radio"/>	Donner accès à FAST HR / Provide Access to FAST HR
<input type="radio"/>	Donner accès aux rapports de vérification de paye / Provide access to the pay verification reports

When completing the form, you will also have to indicate the series of "orgs" to which you will have access, as shown in the following illustration.



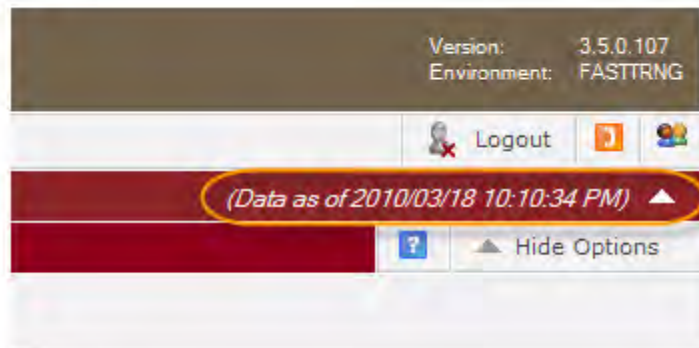
Liste des ORGs auxquels l'employé devra avoir accès / List of ORGs to which the employee will have access to	
BAS / LOW	HAUT / HIGH
BAS / LOW	HAUT / HIGH
BAS / LOW	HAUT / HIGH
BAS / LOW	HAUT / HIGH
BAS / LOW	HAUT / HIGH
BAS / LOW	HAUT / HIGH
BAS / LOW	HAUT / HIGH

Access to FastHR data also depends on the report you use to extract data.

## Why is FastHR called a "data warehouse?"

FastHR is also a data warehouse. Information is drawn from various tables in the Banner software, then processed and organized in the various FastHR tables. The data is refreshed twice a day (at noon and midnight).

When you open a report in FastHR, you can see the date and time the data was drawn from Banner. The following illustration shows this.



As a result, if you generate the same report on two different dates, the data will differ since the source data is updated daily.

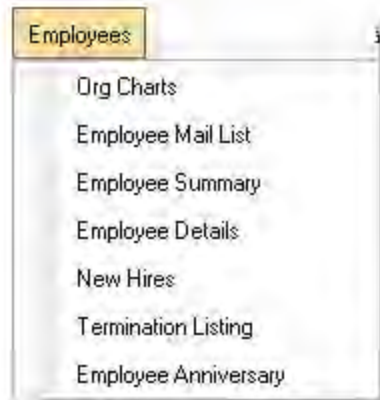
## Data sources for the various FastHR reports

The next section of the guide shows the relationship between the data in the various Banner forms and the FastHR reports.

FastHR is a data warehouse. Data are drawn from the various Banner tables, then reorganized and posted in the various FastHR reports.

Forms are used to enter or view the data in Banner. Chapter 2 of this guide explains how the data posted in the various forms (NBAJOBS, PPAIDEN, PEAEMPL, NBAPOSN etc.) is related.

## EMPLOYEES tab reports



Most of the extracted data in the EMPLOYEES tab reports comes from the PEAEMPL form in Banner.

When the University hires someone, a person identification number must first be created, which goes on to become the employee identification number. This data is entered using the PPAIDEN form as illustrated below.

Identification PPAIDEN 7.2 (TRNGMS)

ID:   Generate ID:

Current Identification | Alternate Identification | Address | Telephone | Biographical

ID:  Name Type:   SSN/SIN/TIN:

---

**Person**

Last Name:

First Name:

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

---

**Non-Person**

Name:

Once the person’s biodemographic data (social insurance number, birth date, language of correspondence, and gender) are entered, their employee status can be determined. The PEAEMPL form in Banner is used for this.

The employee’s status and employee class, the “org” for their home academic or administrative unit (HOME ORG) and the org for their correspondence (DISTRIBUTION ORG) are entered into the PEAEMPL form. Also entered is information on leaves (sabbatical, leave without pay, long-term disability,

etc.) and on whether the employee is ceasing to work for the University. This form also contains seniority dates that are important for social benefit eligibility, internal competitions, the pension plan, etc. The following illustration shows an example of the PEAEMPL form.

The screenshot shows the 'Employee PEAEMPL 7.2 [MC 1.0] (TRNGMS)' window. At the top, the ID is 100300320 and the name is Marielle Trottier. Below this are three tabs: 'General Employee' (selected), 'United States Regulatory', and 'Canadian Regulatory'. The form contains several sections:

- Employee Status:** Active
- Employee Class:** 5A Casual Employees
- Employee Group:** (empty)
- Leave Category:** OT Other Groups
- Benefit Category:** EA Ineligible for Benefits
- Part or Full Time Status:** Part Time
- Home Department:** U 110124 Membres du groupe / Secti
- Check Distribution:** U 110124 Membres du groupe / Secti
- District or Division:** (empty)
- Service Dates:**
  - Current Hire: 16-SEP-2008
  - Original Hire: 16-SEP-2008
  - Adjusted Service: 16-SEP-2008
  - Seniority: 16-SEP-2008
  - First Work Date: 16-SEP-2008
  - Last Work Date: (empty)

In short, the extracted data in the EMPLOYEES tab reports comes from the PPAIDEN and PEAEMPL forms.

Access to information is determined based on the elements HOME DEPARTMENT and CHECK DISTRIBUTION. If you do not have access to the “orgs” entered into these forms, you cannot extract data from them.

Example: If employee Anne Reynolds works in both the Faculty of Arts and Telfer School of Management but her primary job is in the Telfer School of Management, her HOME DEPARTMENT is 110103. If you have access to the “orgs” starting with 19 (Faculty of Social Sciences), you will not see the information about Anne in the extracted data in the Employee reports.

## JOBS tab reports



The JOBS tab reports use the TIMESHEET ORG to control access to data. This data comes from the TIMESHEET ORGANIZATION field in the following image. Data in the various reports of the FASTHR JOBS tab is extracted from the Banner NBAJOBS form illustrated below.

The screenshot shows the Banner NBAJOBS form for employee Marielle Trotter. The form is titled "Employee Jobs NBAJOBS 7.3.0.1 (TRNGMS)". At the top, there are fields for ID (100300320), Position (SC0006), and Suffix (00). Below these are several tabs: "Base Job", "Job Detail" (which is selected), "Payroll Default", "Deferred Pay", "Miscellaneous", and "Excluded Deductions/Benefits". The "Job Detail" tab contains the following information:

Effective Date:	16-SEP-2008
Personnel Date:	16-SEP-2008
Status:	Active
Title:	Casual General Support
Job FTE:	1.000
Appointment Percent:	100.00
Encumbrance Hours:	
Encumbrance Indicator:	Value Input
Hours per Day:	1.00
Employee Class:	5A Casual Employees
Leave Category:	OT Other Groups
Change Reason:	NEW New Employee
Employer Code:	RP02 Ottawa University RP02

## POSITIONS tab reports



The POSITION tab reports use the HOME DEPARTMENT ORG and the TIMESHEET ORG to provide access to the data in these reports.

The data in the POSITIONS tab reports is extracted from several forms, including the NBAJOBS and NBAPOSN forms.

The NBAPOSN form supplies basic data on a position such as the title of the position, to whom the position reports, the salary scale, the number of months of probation when an employee is hired into the position and considerable other information about the position.



The following illustration is an example of a position in the Banner NBAPOSN form.

The screenshot displays the Banner NBAPOSN form for Position Definition. The window title is "Position Definition NBAPOSN 7.2 (TRNGMS)".

**Position Number:** SC0006

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**Position Status:** Active      **Type:** Pooled  
**Position Begin Date:** 01-JAN-2007      **Position End Date:**

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**Compensation and Classification**

**Position Class:** 44011 Casual General Support  
**Position Title:** Casual General Support  
**Employee Class:** 5A Casual Employees  
**Job Progression:**  
**Salary Group:** 2008 NO PAYSCALE  
**Salary Table:** NO  
**Salary Grade:** 00  
**Salary Step:** 0  
**Reports To:**  
**Work Schedule:**  
**Probationary Period:**  
**Bargaining Unit:** NO None  
**Supervision:**

## PAYROLL tab reports

The PAYROLL tab reports (pay list) supply data on the gross amounts paid to employees. These reports use the HOME DEPARTMENT ORG and TIMESHEET ORG to provide access to the data in these reports.

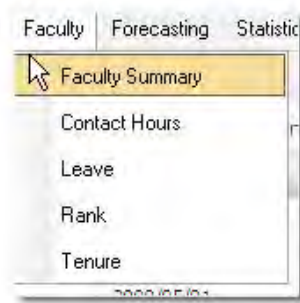


The PAYROLL data comes from several payroll tables belonging to Banner (NBRPTOT, NHRDIST, PHRDEDN, PHREARN, PHRDOCM etc.). These tables are only accessible to employees responsible for payroll, and they contain past payroll data by pay, month, quarter, type of earning, etc.

Although the PAYROLL tab contains several reports, only the first four are available to decentralized users, i.e. people working in faculties and services other than the Finance, Human Resources and Financial Planning sectors. Only the following three reports may be executed by decentralized users.



## Les rapports de l'onglet FACULTY



The FACULTY tab reports make it possible to extract data on tenure access, sabbaticals and professors' rank.

The FACULTY tab reports control access to data from the HOME DEPARTMENT and CHECK DISTRIBUTION orgs, with the data being drawn from the PEAFACT form as illustrated below.

The screenshot shows a web application window titled "Faculty Action Tracking PEAFACT 7.2 (TRNGMS)". The form contains the following fields and values:

- ID:** 100115450 (with a dropdown arrow) and Marcel Cousineau
- Status:** Active
- General** section:
  - Primary Activity:** Instructional (dropdown menu)
  - Original Appointment Begin Date:** (calendar icon)
  - Original Appointment End Date:** (calendar icon)
  - Birth State or Province:** (dropdown menu)
  - Institution Credit:** (text input)
  - AAUP Member**
  - Terminal Degree**
  - Activity Date:** 18-NOV-2010
  - User ID:** HRTRAIN01

## Navigating in FastHR

The next section of the guide contains information on navigating and using FastHR. It discusses the icons on the FastHR toolbar and their use, the procedure for modifying your user profile, and the selection filters and their use.

## FastHR terminology

What is a filter? A filter is a condition or combination of conditions applied before a report is executed.

What is an application? It is a tool allowing one or more tasks or functions to be performed. In everyday language, an application could be compared to a piece of software.

What is an operator? In computing language, an operator is a symbol for performing a logical or mathematical operation on data. The following operators are used by FastHR: =, all,<>, >,<=>,<,<= and between.

## Primary menu tabs

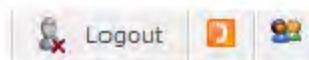
The FastHR reports are divided into categories and grouped under tabs. The tabs in the following image show the various report categories. The tabs you see on the screen are determined by the role you were assigned in FastHR security. You may not, therefore, see all the tabs appearing in the image below. You may also not have access to all the reports available under each tab. The role you were assigned determines which reports you have access to.



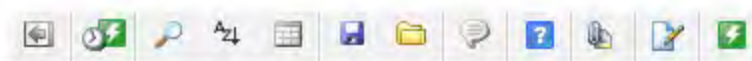
## FastHR toolbars

There are several toolbars in FastHR.

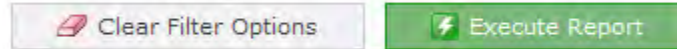
The first toolbar that appears upon entering FastHR is the following:



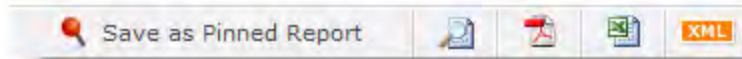
The following toolbar only appears when you select certain reports.



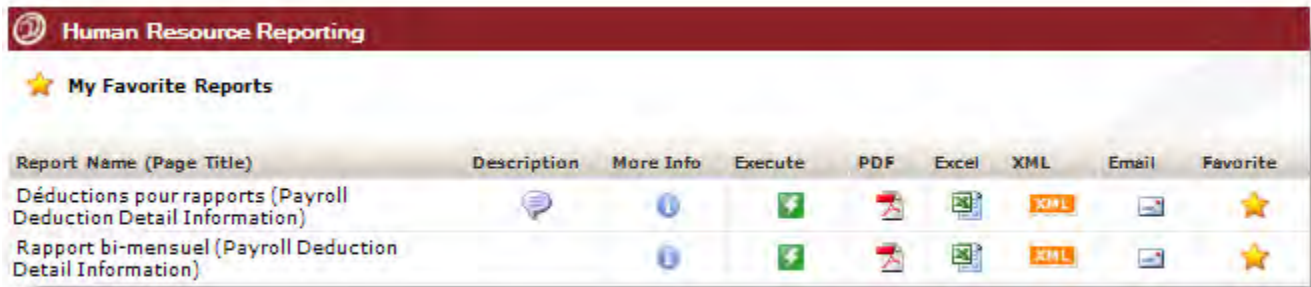
The third toolbar only appears when a report is selected.



This toolbar appears below a report after it has been executed..















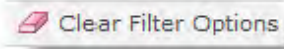
FastHR version 3.5 includes a new toolbar that appears when favorite reports (My Favorite Reports) or saved reports (Pinned Reports) are being created.






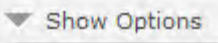
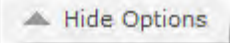
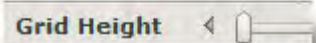
The following table gives a brief description of the icons on the two toolbars in the preceding image. The first line of the toolbar is always on the screen while the second line only appears when a specific report is selected.

Icône	Nom	Description et usage
	Contact info	This icon gives you information on the company that sells FastHR. If you experience problems with FastHR, do not use this contact information. Instead, contact the Computing Help Centre (6555).
	Profile Info	This icon leads you to the information contained in your FastHR user profile.

Icône	Nom	Description et usage
	Previous Page	This icon allows you to return to the previous page. .
	Report Execution History	This icon gives you access to the history of a certain number of recently executed reports. By default, the system displays the last 10 reports executed..
	Filter Options	This icon allows you to modify or simply visualize the filters on the report you have just executed.
	Sort Options	This icon allows you to sort the information displayed on the screen.
	Grid Columns Options	This icon allows you to select the columns to be displayed in a report.
	Save Page Options	This icon allows you save the filters and columns you have selected as well as the sort you want for a specific report.
	Load Page Options	This icon allows you to execute a report with a list of options saved with the SAVE PAGE OPTIONS button.

Icône	Nom	Description et usage
	Additionnal Information	This icon appears in a darker colour when additional information is available.
	Context Sensitive Help	This icon allows you to get context sensitive on-line help
	Page Notes	This icon allows you to save information as page notes.
	Display Filter Options	This icon shows the selected filters in FastHR language for the executed report.
	Export to Excel	This icon allows you to export the report in Excel format.
	Clear Filters	This icon allows you to empty all selected filters.



Icône	Nom	Description et usage
	Execute Report	This icon allows you to execute a selected report
	Export to PDF	This icon allows you to export the report in PDF format.
	Save as Pinned Report	This icon allows you to save the selected options of the report (filters, sort and column selections).
	Show Options	This icon allows to show and modify the filters.
	Hide Options	This icon will hide the filters once you are done with the filter selection.
	Grid Height	This icon allows you to expand the region where the report is displayed.

Icône	Nom	Description et usage
	Export to Xml	This icon allows you to export the report in Xml version in order to import them in a web database.
	Hide Menu	This icon that you will find on the top red line in the upper part of the screen beside the FastHR data date allows you to hide the top menu.
	Add as Favorite Report	This icon allows you to save the pinned report as a favorite report.
	Remove from Favorites	This icon allows you to move the report from the section “My Favorite Reports” to the section “My Pinned Reports”.
	More Info	This icon displays the name of the report creator, the date when the report was created, the date when the report was last executed and the number of times the report was executed.
	Email Pinned Report Link	This icon allows you to send the hyperlink of the saved report. Important: This icon does not send the content of the report but only the hyperlink to execute de report. The receiver must have access to FastHR in order to execute the report because he will have to key in his user id and password when clicking on the hyperlink.
	Logout	This icon allows you to logout from FastHR.

## Modifying your user profile

You can modify some elements of your user profile.

- You can select a preferred language other than the one appearing on the screen. When you modify your preferred language, the FastHR screen is automatically refreshed to display the screen in your preferred language.
- You can also modify your user profile to display a larger number of recently executed reports. By default, your user profile displays 10 reports but you may increase this number.
- You can also modify the number of lines displayed on the screen when a report appears.

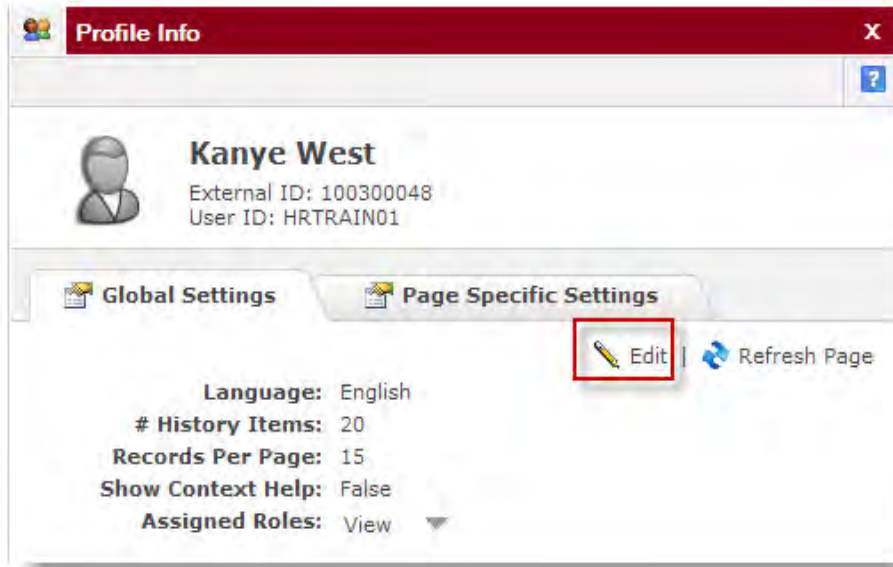
To modify your user profile:

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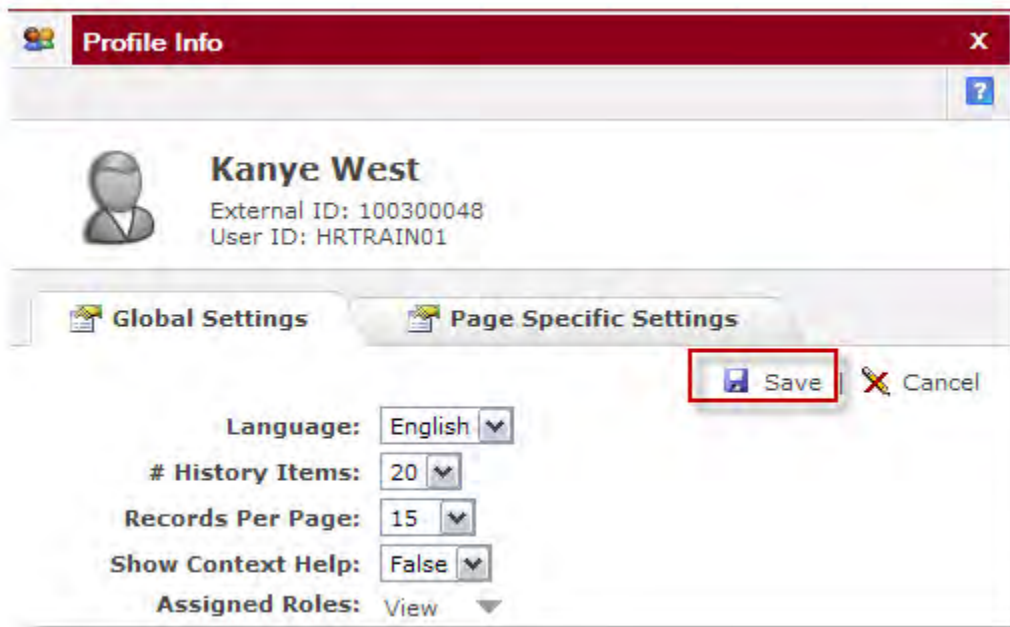
1. Click on the icon



2. Click on Edit (See the red box in the image below).

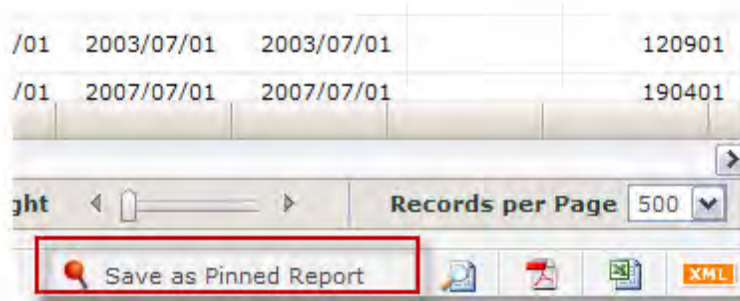


3. Select the desired language, the number of reports retained in the history, the number of records per page, and whether online contextual help is to be available. Then click on Save.
- 



## Saving a report using "Save as Pinned Report"

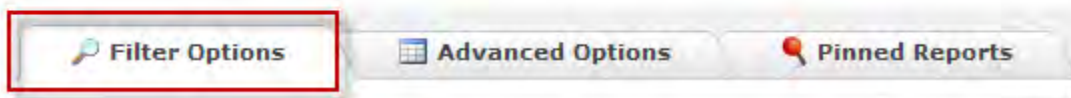
When you generate a report frequently, you have the option to save the filters, columns and sort desired for this report. The Save As Pinned Report icon allows you to save the report options. The following illustration shows where to find the Save as Pinned Report icon.



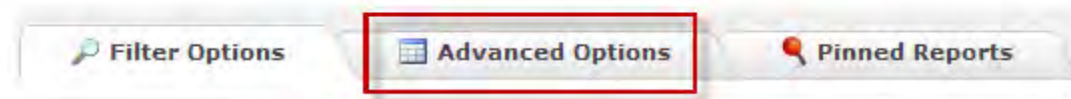
**IMPORTANT:** The Save As Pinned Report icon does not save the custom filters you may have created when generating a report. The only options that are saved using Save as Pinned Report are the sort and selection criteria determined using the filters and the column display options.

## Saving report options using Save as Pinned Report

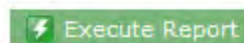
- 1) Select the report you want to generate.
- 2) Select the desired filters using the Filter Options tab (filters are explained in section 3.3 of this guide).



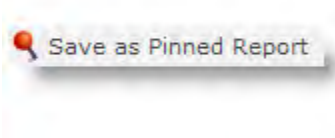
- 3) Select the columns to be displayed in the report and select the desired sort by clicking on the Advanced Options tab.



- 4) Execute the report with the selected options (filters, sort and columns).



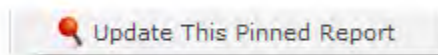
- 5) Click on Save As Pinned Report.



- 6) Type a new significant name or update an option you have previously created. The following illustration shows where to type the name of the option you have created.

A yellow-bordered form with two input fields. The first field is labeled "Report Name" and contains the text "Male Regular Academics 1A". The second field is labeled "Description" and is currently empty.

- 7) If a report already exists, your option already exists. To update it, click on Update this Pinned Report.



- 8) Click on the following icon to save the report option.

*NOTE: If you create an option and click on the small box next to SAVE PAGE AS PUBLIC, you make this option available to ALL FastHR users. When a PAGE OPTION has been made "public," any user may view it.*

A yellow-bordered form with two input fields and a checkbox. The first field is labeled "Report Name" and contains the text "Male Regular Academics 1A". The second field is labeled "Description" and is currently empty. To the right of the input fields is a checkbox labeled "Make Report Public" which is currently unchecked. To the right of the checkbox are two small icons: a blue document icon and a red 'X' icon.

## Executing a report from the "Pinned Reports" section

You have saved a report in the Pinned Reports section and wish to execute it.

- 1) Click on the plus sign (+) next to My Pinned Reports to obtain the list of saved reports.



- 2) Select the report you wish to execute and click on the Execute Report icon.



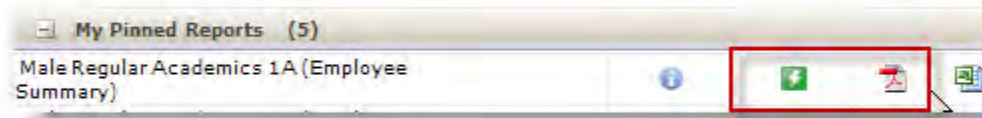
## Exporting a pinned report into Excel or PDF format

It is possible to export a pinned report into Excel or PDF format in a single step, without having to execute the report beforehand. Simply follow these steps:

- 1) Click on the plus sign (+) next to My Pinned Reports to obtain the list of saved reports.



- 2) Select the report you wish to execute and click on the Execute Report icon.

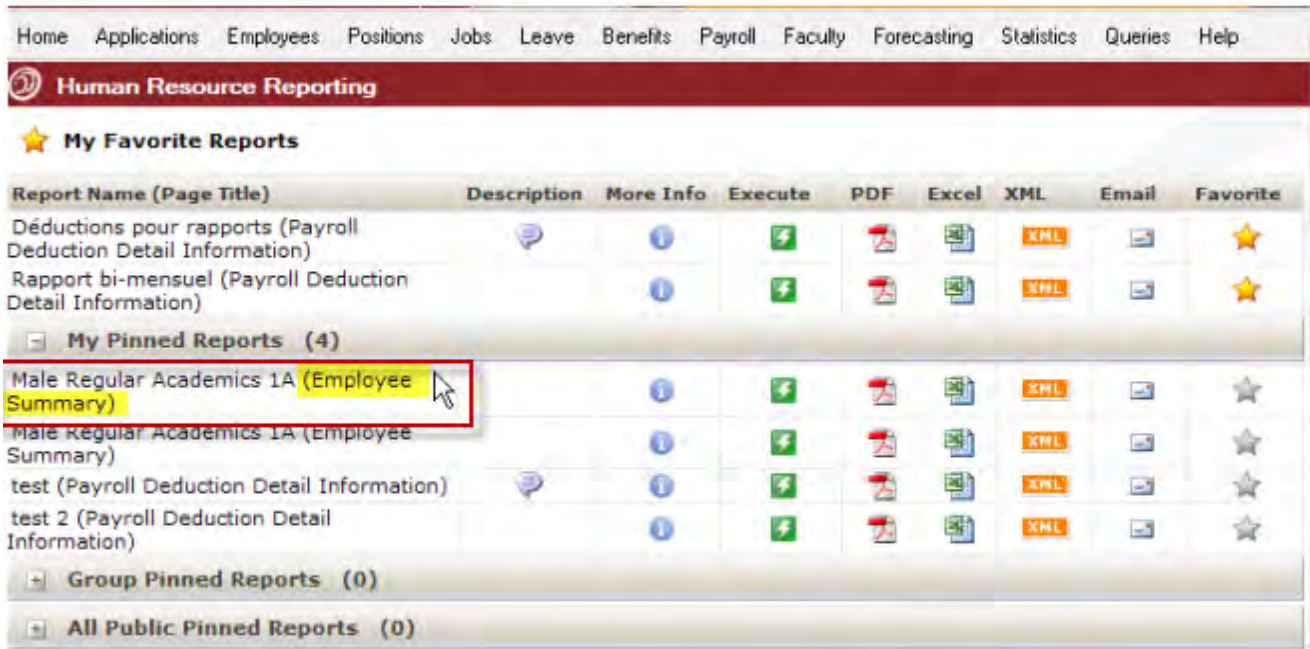




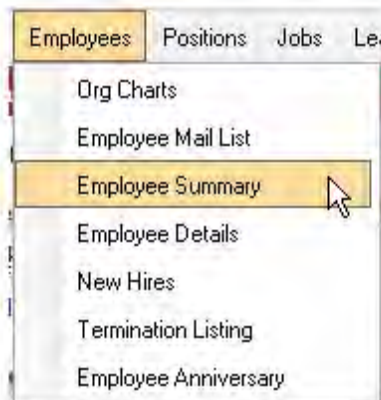
## Deleting a report from the Pinned Reports section

It is possible to delete a report you have saved in the Pinned Reports section.

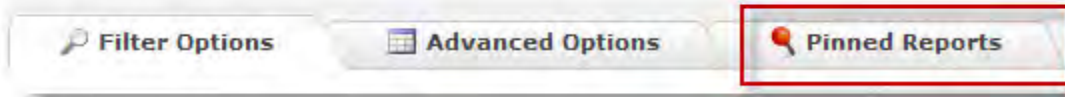
- 1) Start by selecting the tab used to create the pinned report. The name of the tab is normally found in parentheses just next to the name you assigned to the report, as illustrated below.



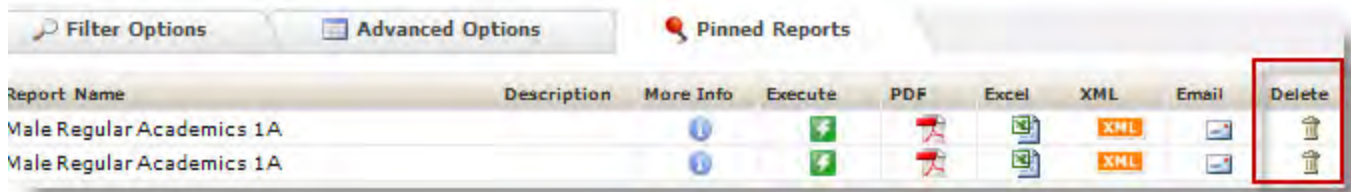
- 2) Click on the tab containing the report you used to create the pinned report.



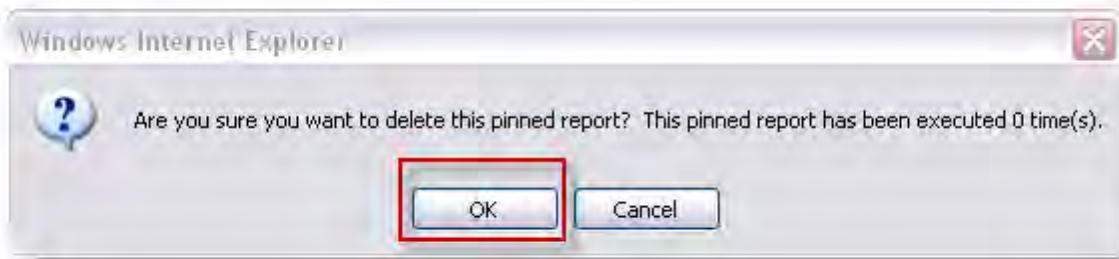
3) Click on the Pinned Reports tab.



4) Click on the Delete icon in the row of the report to be deleted.



5) Click on OK when the following message appears.



## Moving a pinned report into the My Favorite Reports section

You have saved a report in the My Pinned Reports section and would like to place it in the My Favorite Reports section. Simply follow these steps to do so.

- 1) Click on the plus sign (+) next to My Pinned Reports to obtain the list of saved reports.



- 2) Click on the Add to Favorites icon in the row of the report to be moved.



## Online contextual help

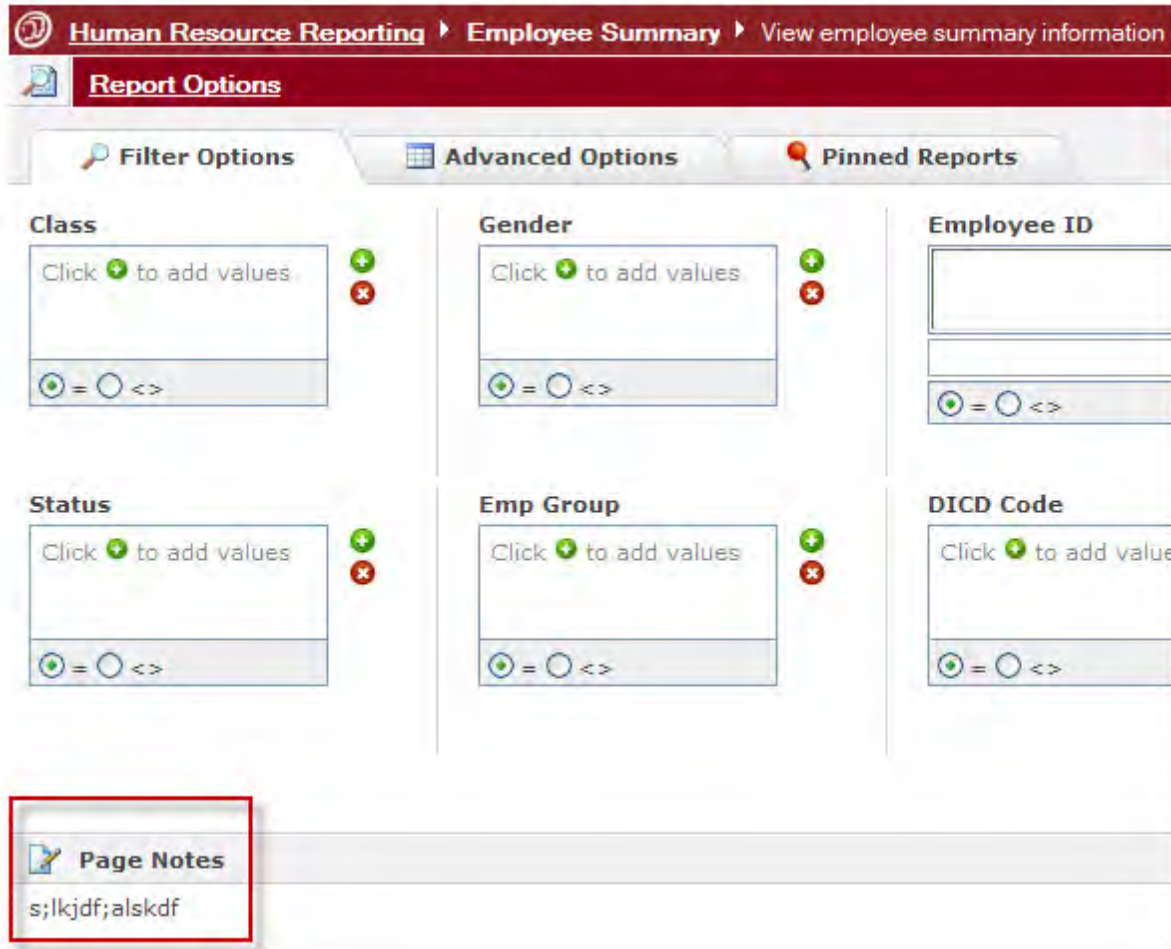
If you need help while viewing any screen in FastHR, simply click on the icon,



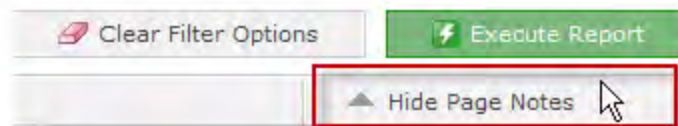
which will display a window containing information specific to the screen in question.

## PAGE NOTES icon

The PAGE NOTES button allows you to save information in the form of notes. Not all users are authorized to create notes. The role you were assigned in FastHR determines whether you can create notes or only view them. Page notes are associated with a selected report; they always appear in the section below the various report tabs.



If you do not wish to see the page notes, click on the Hide Page Notes icon.



## Various filters in FastHR

Several types of filters exist that you may use to generate your reports.

The date filter

The date filter uses a date to select data from your report. The date filter always displays a calendar that you may use to enter the date. Here is an illustration of a date filter.



You also have the option of entering the date in the YYYYMMDD format, which will automatically be converted to FastHR's own date format. Simply type "/" to separate the different parts of the date. The two following images show how to enter an unformatted date.

- 1) Type the date within the date filter.



- 2) Wait one or two seconds for the date format to change.

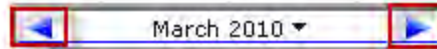


If you prefer to select a date using the calendar, follow these steps:

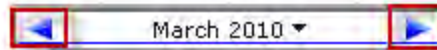
- 1) Click on the icon shown below to display the calendar.



- 2) Select the date using the arrows.



- 3) Or use the icon representing the current month, at the line at the top of the calendar, to go to the desired month and year.



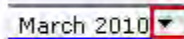
- Using the left arrow, you can go backward one month at a time.



- Using the right arrow, you can go forward one month at a time.



- Using the down arrow, you can simultaneously select a specific month and year.



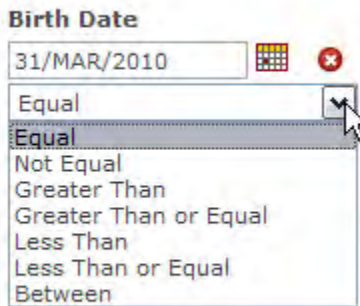
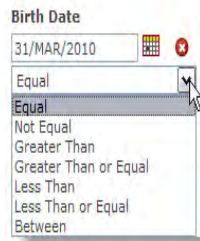
- 4) Click on a date box in the calendar for it to be displayed in the date filter..

A calendar grid for March 2009. The days of the week are listed at the top: Sun, Mon, Tue, Wed, Thu, Fri, Sat. The dates are arranged in a grid. The date 03 is highlighted in yellow.

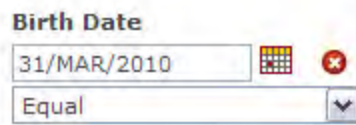
Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04
05	06	07	08	09	10	11



- 5) Select the appropriate operator depending on whether you wish the date to be equal to, earlier than or later than the date entered in the box.



- 6) Click on the operator selection line illustrated in the image below.

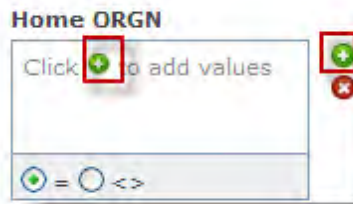


If you select the operator BETWEEN, a second date box appears on the screen.



The dropdown list filter

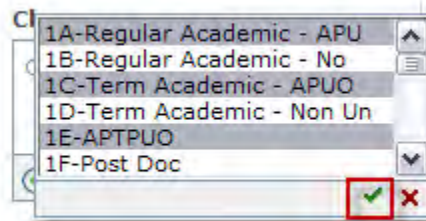
To select a few values in the drop-down list, you may click on one of the two plus signs (+) found inside and outside the filter box.



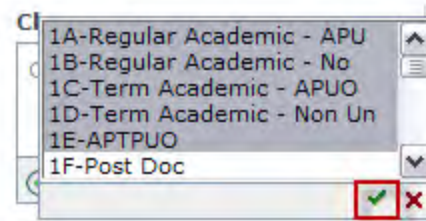
When selecting values in a dropdown list:

Using the dropdown list filter, you can select one or more values at the same time.

- 1) To select unrelated values, hold the CTRL key down and click on the different values desired.



- 2) To select consecutive values (that follow one another), hold the SHIFT key down, then click on the first value to be selected and bring your cursor to the last value to be selected.

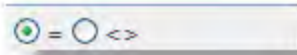


- 3) Click on the small check mark.



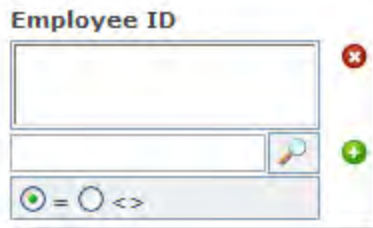


- 4) Choose the operator appropriate to your selection by clicking inside the radio buttons, as shown in the image.



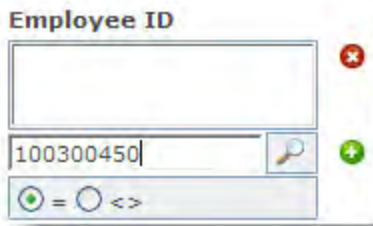
### Multiple search filter

This type of filter is used to search for one or more specific values.



To insert one or more values:

- 1) Type the filter value in the box.

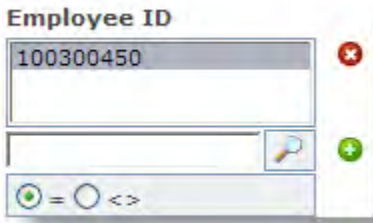


- 2) Click on the small green plus sign (+) to transfer the value entered into the upper box.



- 3) To add another value, repeat steps 1 and 2 above.

The following illustration shows an example of a multiple search filter.



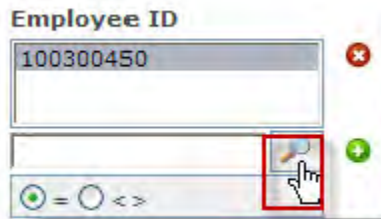
To remove an employee number from the upper filter box:

- 1) Double click on the employee number to be removed.
- 2) Click on the icon illustrated below to remove the number.



If you know the number associated with the value sought:

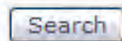
- 1) Click on the icon found next to the box.



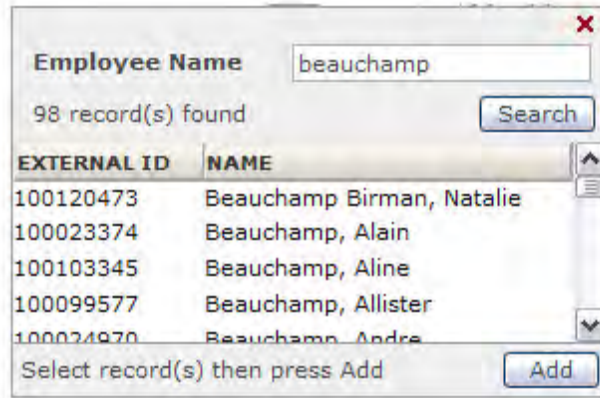
- 2) When the above window appears, type in the family name followed by a space, a comma and the first letter of the given name of the employee to be found.



- 3) Click on the search button.

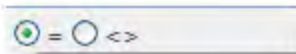
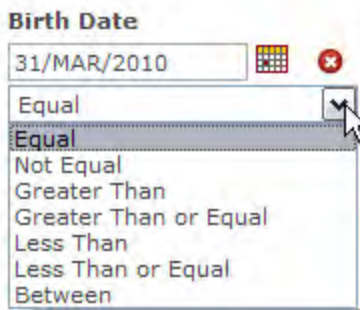


4) A list containing the value(s) sought will then appear.





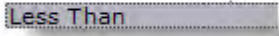
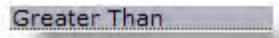
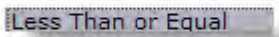


### Various filter operators

Filter operators are logical signs allowing you to complete your data selection. The two illustrations below give examples of FastHR operators..



The following table explains the usefulness of each of the FastHR operators.

	<p>Indicates to FastHR that you only wish to obtain data that is EQUAL TO the values selected in the dropdown list.</p>
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	<p>Indicates to FastHR that you only wish to obtain data that is <b>DIFFERENT FROM</b> the values selected in the dropdown list.</p>
	<p>Indicates to FastHR that you only wish to obtain data that is <b>LESS THAN</b> the value entered (a date / a number).</p>
	<p>Indicates to FastHR that you only wish to obtain data that is <b>GREATER THAN</b> the value entered (a date / a number).</p>
	<p>Indicates to FastHR that you only wish to obtain data that is <b>LESS THAN OR EQUAL TO</b> the value entered (a date / a number).</p>
	<p>Indicates to FastHR that you only wish to obtain data that is <b>GREATER THAN OR EQUAL TO</b> the value entered (a date / a number).</p>
	<p>Indicates to FastHR that you only wish to obtain data that is <b>BETWEEN THE TWO DATES</b> you have entered. When you select this operator, a second box appears allowing you to enter another date.</p>

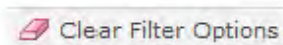
## Emptying the existing filters

It is important to erase the filters between each execution of various reports because the filters are retained in memory throughout your FastHR session. When you quit FastHR, the filters are erased.

- 1) Click on the icon illustrated here to view your filters.



- 2) Erase your filters by clicking on the icon below.



## Exporting reports into Excel

**NOTE:**

- Ensure that you erase the filters before executing your reports. Otherwise, they will be retained from the moment you execute your first report to the end of your FastHR session.
- Ensure that you ALWAYS select at least one filter; otherwise, the system will send you an error message.
- Ensure that you know the file location when you export your report into Excel.

## Executing a report in FastHR

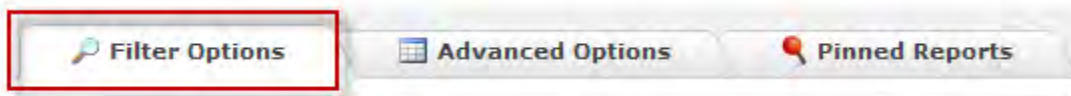
- 1) Click on the tab containing the report.



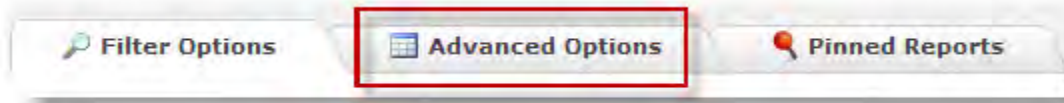
- 2) Select the desired report.



- 3) Click on the Filter Options tab to select filters.



- 4) Click on the Advanced Options tab to modify the sort and select the variables to be displayed in the report.



- 5) Click on Execute Report to execute the report.



## Modifying a report after execution

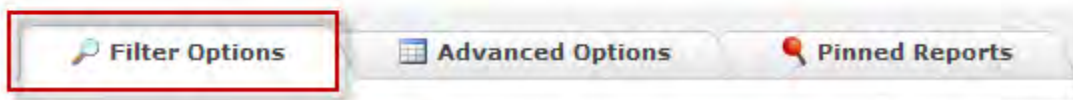
You have the ability to modify the filters, select the variables and modify the sort. These options are very useful in cases where you have to send someone a simplified version of the selected report.

To choose the columns you wish to display in the selected report:

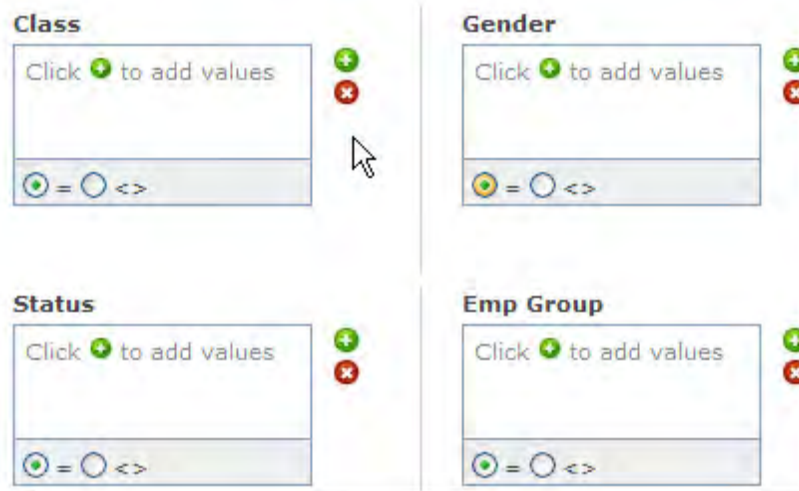
- 1) Click on the icon illustrated here.



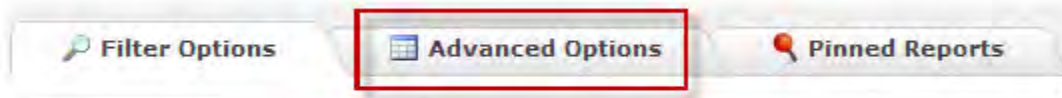
- 2) To modify the filters, click on the Filter Options tab.



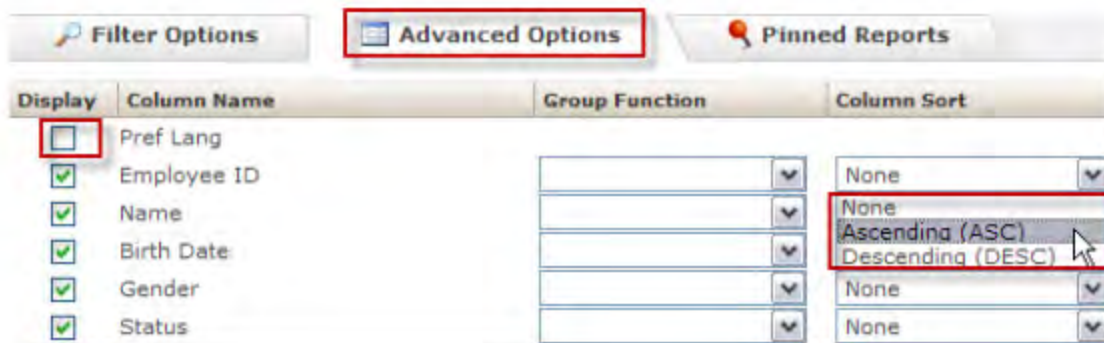
3) Modify the various report filters.



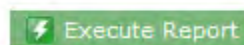
4) Click on the Advanced Options tab.



5) To remove a variable from the report, click on the small box next to the variable. To sort the report based on one of the variables, click Column Sort on the same row as the variable to be sorted.

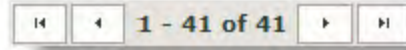


6) Click on Execute Report to re-execute the report.



## Viewing data before exporting it into Excel

FastHR always indicates the number of records obtained when a report is executed. You may also view the data on the screen using the toolbar icons reproduced below.



The following icon allows you to go to the first page of a report.



The following icon allows you to go to the last page of a report.



The following icon allows you to go forward one page at a time.



The following icon allows you to go backward one page at a time.





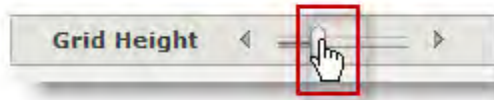
## Enlarging the report display

You may enlarge the area where the report data appears.

The screenshot shows a web-based report interface. At the top, a red header bar contains the text "(Data as of 2010/03/30 10:10:44 PM)". Below this is a navigation bar with a question mark icon and a "Show Options" dropdown. The main content is a table with the following columns: "Current Hire", "Adj Service", "Seniority", "Termination", "Home ORGN", "Dist ORGN", and "D:". The table contains 15 rows of data, with dates in the first three columns and organizational codes in the last two. Below the table is a control bar with a "Grid Height" slider (highlighted with a red box) and a "Records per Page" dropdown set to 500. At the bottom, there is a "Save as Pinned Report" button and a toolbar with icons for print, refresh, and XML export. The footer features the "FAST" logo and the text "fast administration support tool".

Current Hire	Adj Service	Seniority	Termination	Home ORGN	Dist ORGN	D:
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/07/25	2008/04/16	2008/04/16		320101	320101	
2003/07/01	2003/07/01	2003/07/01		190201	190201	
2003/07/01	2004/07/01	2003/07/01		220101	220101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2003/07/01	2003/07/01	2003/07/01		180201	180201	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	

- 1) Move the arrow in the Grid Height section.



2) After modifying the Grid Height, you should see more data on the screen.

(Data as of 2010/03/30 10:10:44 PM) ▲

Current Hire	Adj Service	Seniority	Termination	Home ORGN	Dist ORGN	D
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/07/25	2008/04/16	2008/04/16		320101	320101	
2003/07/01	2003/07/01	2003/07/01		190201	190201	
2003/07/01	2004/07/01	2003/07/01		220101	220101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2003/07/01	2003/07/01	2003/07/01		180201	180201	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2003/07/01	2003/07/01	2003/07/01		190501	190501	
2003/07/01	2003/07/01	2003/07/01		121601	121601	
2003/07/01	2003/07/01	2003/07/01		190301	190301	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2003/07/01	2003/07/01	2003/07/01		120201	120201	
2003/07/01	2003/07/01	2003/07/01		170301	170301	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
2008/04/16	2008/04/16	2008/04/16		320101	320101	
.....	.....	.....		.....	.....	

Grid Height Records per Page 500 ▼

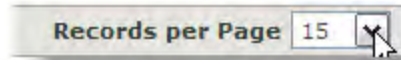
Save as Pinned Report XML

## Modifying the number of rows displayed on the screen

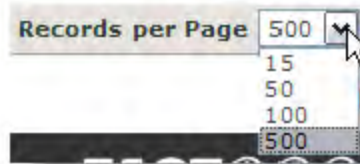
You may change the number of rows appearing on the screen. By default, FastHR only displays 15 rows at a time when you execute a report. Some reports may have more than 15 rows; by increasing the number of rows per page, they can all be seen.

Here is how to modify the number of rows on the screen to avoid having to switch between screens:

- 1) Click on the arrow at the end of the following icon.



- 2) Select the number of rows you wish to see displayed on the screen and click on it.



- 3) The screen will automatically refresh.

- 4) You may now view the rows using the scroll bar on the right side of the screen.

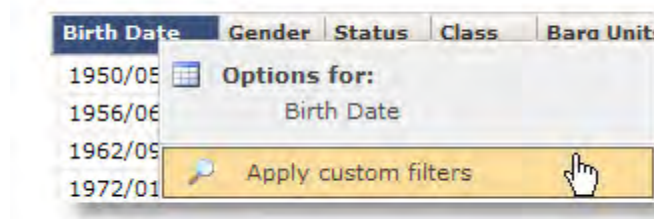


## Creating custom filters

When a report has been executed, it appears on the screen. At this point, custom filters may be added to obtain more precise data.

To add a custom filter:

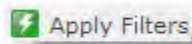
- 1) Place the cursor on the name of the variable to be filtered.
- 2) Select Apply Custom Filter.



- 3) Enter the value of the variable to be filtered, e.g. birth date.

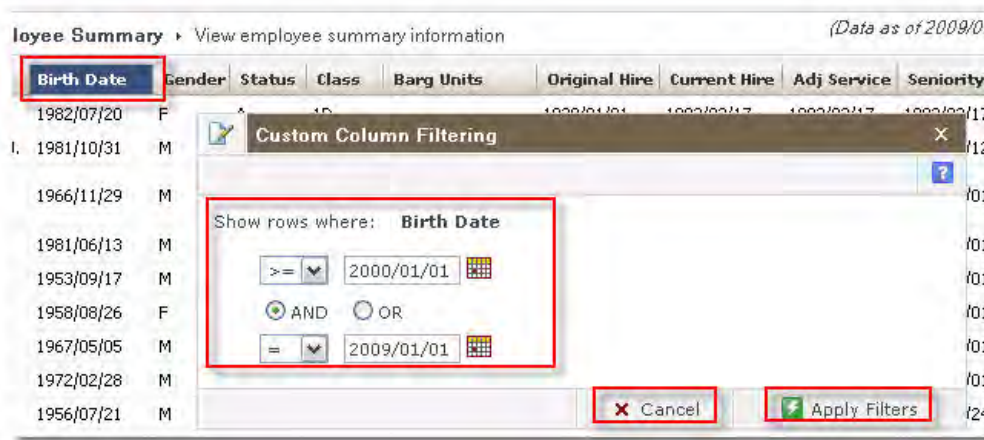
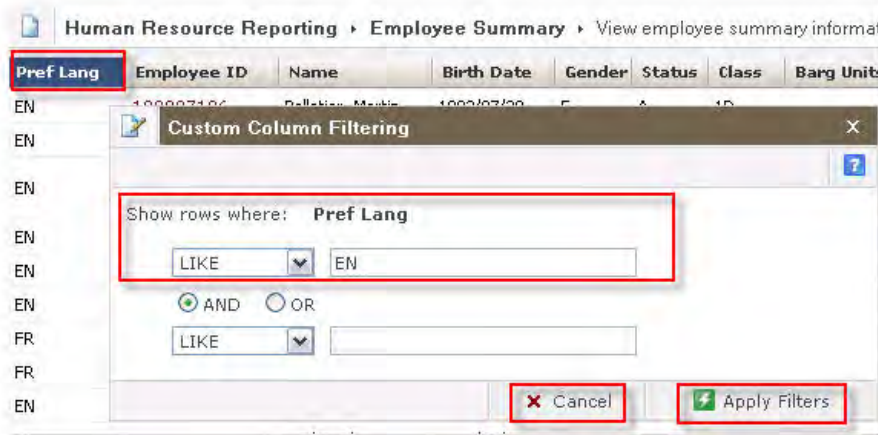


- 4) Click on Apply Filters to execute.



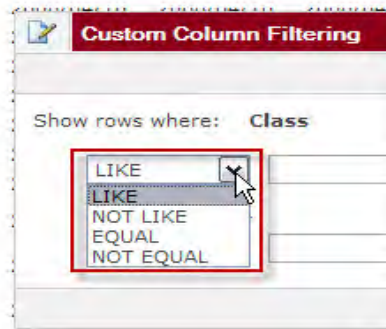


The two illustrations below show how to enter the value of the variable to be filtered in the case of numeric and date variables.



Filter operators also exist for additional filters.

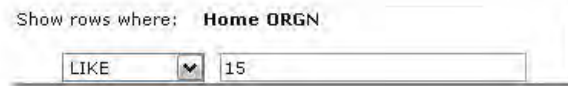
The image below shows the various operators that may be used to filter the data in FastHR.



Difference between the operators LIKE and EQUAL

The operator LIKE is used to obtain data with similar values. Here are a few examples:

- 1) To find all the positions belonging to the Faculty of Medicine, the operator LIKE would be used.



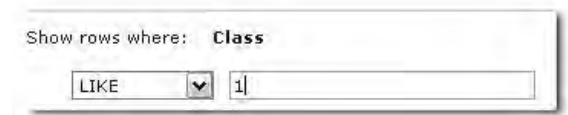
Filter dialog box for 'Home ORGN'. The operator is set to 'LIKE' and the value is '15'.

- 2) To find position titles starting with the word Officer, the operator LIKE would be used.



Filter dialog box for 'Description'. The operator is set to 'LIKE' and the value is 'officer'.

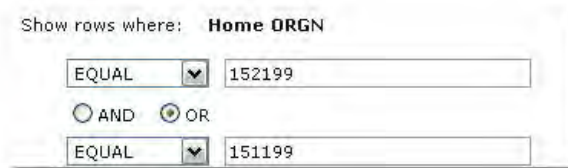
- 3) To find positions associated with the employee classes starting with 1, the operator LIKE would also be used.



Filter dialog box for 'Class'. The operator is set to 'LIKE' and the value is '1'.

The operator EQUAL is used to obtain data with a specific value. However, LIKE could also be used and the same result would be obtained.

Pour trouver les postes appartenant à deux HOME ORGN spécifiques, on pourrait choisir l'opérateur EQUAL.



Filter dialog box for 'Home ORGN'. The operator is set to 'EQUAL'. There are two input fields: the first contains '152199' and the second contains '151199'. The 'OR' radio button is selected.

The two approaches illustrated above will generate the same result.

Conclusion: the operator LIKE may be used in all cases, but the operator EQUAL may not. LIKE must be used when the value sought does not exactly match the value appearing in the report.



## Additional information in reports

Additional information may be obtained on a variable that is displayed in red in a report. The image below shows what displaying a variable in blue and underlining it means.

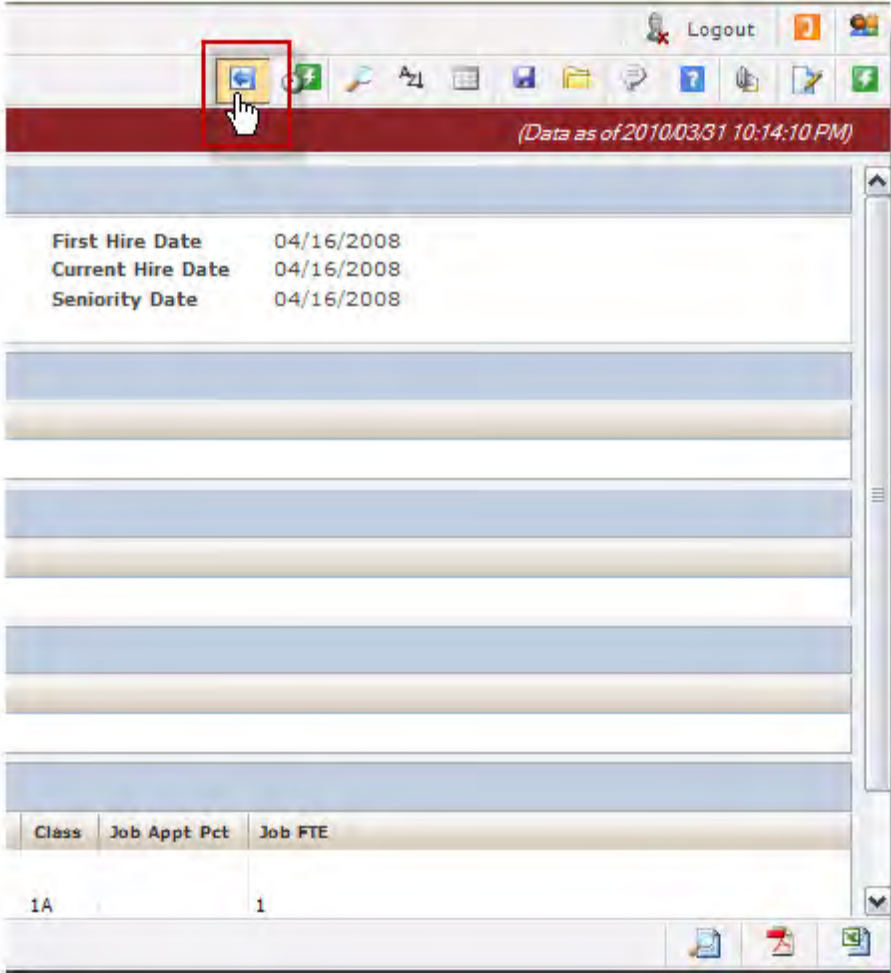
Pref Lang	Employee ID	Name	Birth Date	Gender	Status
EN	<u>100300056</u>	Houde, Mathieu	1950/05/05	M	A
EN	<u>100300064</u>	Boulay, Isabelle	1956/06/08	F	A
EN	<u>100300066</u>	Bon Jovi, Jon	1962/09/23	M	A
EN	<u>100300048</u>	West, Kanye	1972/01/01	N	A
EN	<u>100121843</u>	Millbank, Sylvain	1967/10/04	F	A
EN	<u>100121875</u>	Gordon, Mirela	1963/09/21	F	A
EN	<u>100300065</u>	Lemay, Linda	1966/12/28	F	A
EN	<u>100300063</u>	Robitaille, Damien	1975/09/25	M	A
EN	<u>100300061</u>	Hamelin, Marc- André	1969/11/11	M	A
EN	<u>100300057</u>	Lepage, Catherine	1955/03/06	F	A
EN	<u>100121841</u>	Dang, Claire	1983/06/09	M	A
EN	<u>100300049</u>	Young, Neil	1962/01/01	M	A
EN	<u>100300053</u>	Murray, Anne	1949/10/10	F	A
EN	<u>100300060</u>	Cook, Daniel	1988/09/09	M	A
EN	<u>100300062</u>	Brandt, Paul	1959/02/02	M	A

For example, clicking on a number displayed in blue on the screen shown above will generate the following screen.

The screenshot displays the 'Employee Detail Information' page for Mathieu Houde. The page is organized into several sections: Employee Info, Address Info, Email Info, Bargaining Units, and Job Info. The 'Job Info' section contains a table with the following data:

Posn	Suff	Status	Description	Annual Salary	Emp Code	Job Class
100336	00	A	LIBRARY TECHNICIAN	\$50,000.00	RP01	2B

Click on the icon below to return to a report.



## Exporting data into an Excel file

The following icon allows you to export a report into an Excel file.



- 1) Click on the icon below to export a file into Excel.



- 2) Click on OPEN or SAVE to open or save the file.



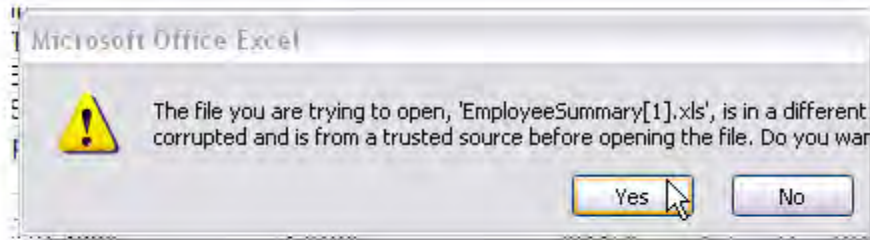
**CAUTION: MAKE SURE TO SAVE YOUR FILE ON A DISK OR A PROTECTED FOLDER TO MAINTAIN THE CONFIDENTIALITY OF THE INFORMATION CONTAINED IN YOUR EXPORTED FILES.**

## Saving a file in Excel format

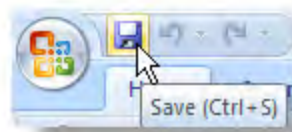
When you import a file into Excel, the Excel software opens automatically but the file is not in true Excel format. You must make sure to save your file in the right format.

To save a file in Excel format, follow these steps:

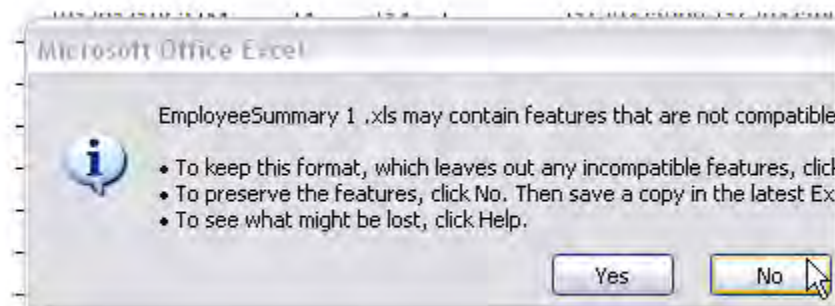
- 1) Export your file into Excel.
- 2) Click on YES when the following window appears.



- 3) Click on the icon below in the Excel toolbar.

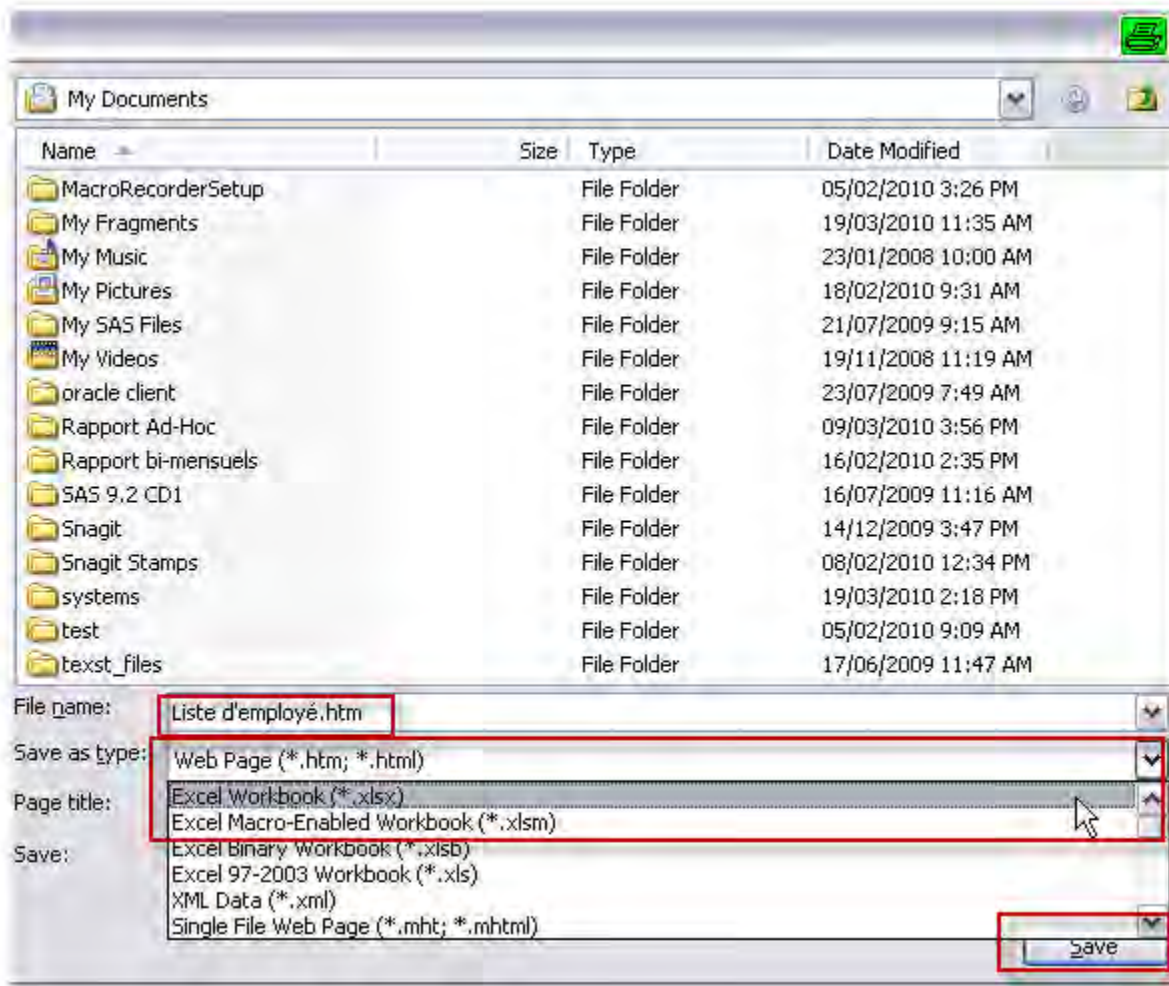


- 4) Click on NO when the following message appears.

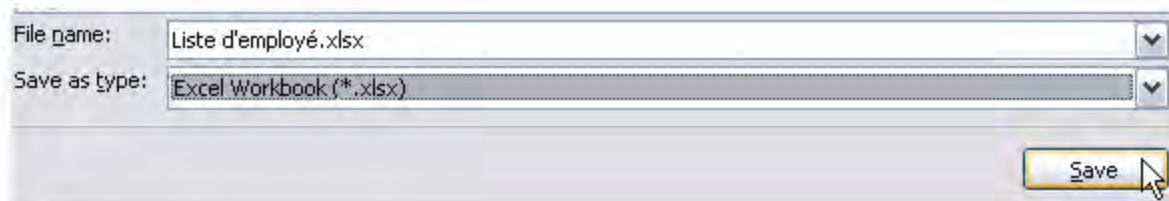




- 5) Type a significant file name in FILE NAME, for example, FOAP 20080615.XLS.  
You may save your file in the desired format.



- 6) Click on the following icon to save your file.



## Examples of reports generated with FastHR

The next chapter discusses the various reports that may be generated with FastHR.

With FastHR, it is possible to print a very large number of reports. The various tabs allow the desired type of report to be selected. However, data selection filters must be used to execute reports.

### What data can be extracted from the various FastHR reports??

The role you were assigned when your user account was created governs the reports to which you will have access. The table below gives a brief description of the data contained in each FastHR report. You may not have access to the report contained in the following list.

Tab	Report Name	Description
Employees	Org Charts	This report exports the regular support staff positions structure into an Excel file that can be then used to produce an org chart using the Visio software.
	Employee Mail List	This report prints a list of home addresses of your employees.
	Employee Summary	This report contains bio-demographic information of the University employees. This report can be used to print list of employees by departments, by employee class, by years of service and language of correspondence.
	New Hires	This report print list of hired employees on, before or after a specific date.
	Termination Listing	This report prints a list of terminated employees. Please note that retired staff are considered "active" employees and that their names would not appear on this report. To obtain a list of retired staff, you should use the Employee Summary report and select classes 4A and 4B.
	Employee Anniversary	This report prints list of employees with their years of service.
Positions	All Current Positions	This report allows the printing of lists of positions by departments. This report also contains the information related to the incumbent consequently you might obtain duplicate positions when printing a list of pooled positions for your faculty. This report also allows you to print list of single positions for your faculty.

**EXAMPLES OF REPORTS GENERATED WITH FASTHR**

**WHAT DATA CAN BE EXTRACTED FROM THE VARIOUS FASTHR REPORTS??**

Tab	Report Name	Description
	Position Descriptions	This report can only be used to print the list of positions that are associated to a label group. Some positions belong to a label group such as, Administrative Officers, CAOs, Directors of Department, Service or Programs, Executives, Deans. The label group allows the printing of list or labels to be used to send correspondence specifically any or all of the label groups. This report is not available to decentralized users.
	Position History	This report allows to print the historical data (as of June 1 2008) of positions. The historical data contains information such as the position creation date or information pertaining to position reclassification, modification, freeze etc.
	Position Incumbent History	This report allows to print information related to incumbent of positions. The historical information is only available as of June 1st 2008.
	Pay Grades	This report allows the printing of the salary scales of the current fiscal year. This report is not available to decentralized users.
Jobs	Primary Jobs	This report prints the data of primary jobs consequently it is not recommended to use this report to produce analysis because of missing data.
	Current Jobs	This report allows the printing of list of employees with active jobs. Retired or long-term disability staff have an active jobs, one must make sure to either select or exclude those employees using the proper Eclasses. Employees belonging to Eclass 5A have casual jobs that are left active, one must make sure to exclude Eclass 5A when printing a list of employees in current jobs.
	Demographics Jobs	This report prints the data of primary jobs consequently it is not recommended to use this report to produce analysis because of missing data.
	All Jobs	This report allows the printing of employee list occupying jobs whether the jobs is still active or not. Moreover, this report allows the printing of job historical data because everytime a job is modified it adds a line to the report. This report also prints terminated job data. .
	Job Earnings	This report allows the printing of all jobs with their earning codes, whether the jobs is active or not.



Tab	Report Name	Description
	Labour Codes	This report allows the printing of lists of jobs and the FOAP to which the salary is charged. This report gives the FOAP of the jobs when the job is created or modified. The report will not display the timesheet FOAP when it has been overridden directly on the timesheet.
Benefits	Benefit and Deduction Setup	This report allows the printing of lists of deduction setup in Banner. The report prints the amounts and selected options. Due to the confidential nature of the data, this report is only available to some users from the Payroll Sector and Human Resources who have access to FastHR.
	Deduction Details	This report allows the printing of all amounts paid as deductions for all University employees. Due to the confidential nature of the data, this report is only available to some users from the Payroll Sector and Human Resources who have access to FastHR.
	Earning Details	This report allows the printing of all amounts earned as salary for all University employees. Due to the confidential nature of the data, this report is only available to some users from the Payroll Sector and Human Resources who have access to FastHR.
Payroll	Pay Period Earnings Summary	This report allows the printing of lists that gives the total amount paid in salary to employee by Eclasses and by earning codes for all selected pay periods.
	Pay Period Earning Detail	This report allows the printing of list that gives the gross amount paid in salary for each employee by earning code for all selected pay periods.
	Pay Period Earnings Comparison	This report allows the printing of lists that of the amounts earned from one selected pay period compared to another selected pay period.
	Pay Period Deduction Summary	This report allows the printing of lists of total amounts paid as deduction by deduction type pour each selected pay period.
	Pay Period Deduction Detail	This report allows the printing of detailed listing of all deductions paid by employees for all selected pay period. Due to the confidential nature of the data, this report is only available to some users from the Payroll Sector and Human Resources who have access to FastHR.

**EXAMPLES OF REPORTS GENERATED WITH FASTHR**

**WHAT DATA CAN BE EXTRACTED FROM THE VARIOUS FASTHR REPORTS??**

Tab	Report Name	Description
	Pay Period Deduction Comparison	This report allows the printing of amount paid as deduction for a selected pay priod compared to another selected pay period. Ce rapport permet d'imprimer une liste qui fait la comparaison d'un montant payé pour une déduction pour une paye sélectionnée versus le montant payé à une période de paye différente. Due to the confidential nature of the data, this report is only available to some users from the Payroll Sector and Human Resources who have access to FastHR.
	Transaction Details	This report allows to print the amounts that will be transfered to the GL as salary encumbrancing.
	Transaction Date Comparison	This report allows to print a list of amounts encumbranced in the GL while comparing two selected pay priods. Due to the confidential nature of the data, this report is only available to some users from the Payroll Sector and Human Resources who have access to FastHR.
	Transaction Coding	This report allows the printing of amounts sent to the journal entries of Finance Reporting. The fin doc variable corresponds to the transaction number of Finance Reporting. Due to the confidential nature of the data, this report is only available to some users from the Payroll Sector and Human Resources who have access to FastHR.
	Payroll History	This report allows the printing of lists of employees that have received a pay. The report gives the gross paid amount, the total amount for deductions and the net amount given to the employee. The Disposition variable of the report shows if the payroll process was completed or not. Due to the confidential nature of the data, this report is only available to some users from the Payroll Sector and Human Resources who have access to FastHR.
	Payroll Documents	This report allows the printing of list of employees with the net amount received for one or many selected pay periods. The DOC TYPE variable shows if the employee was paid by cheque or direct deposit. Due to the confidential nature of the data, this report is only available to some users from the Payroll Sector and Human Resources who have access to FastHR.
Faculty	Faculty Summary	This report is not complet due to the fact that not all professors data was entered in Banner. It is preferable to use the Rank Report which contains a bit more data.
	Leave	This report contains data related to academic leaves. This report is not complete due to the fact that not all academic leave data was entered in Banner.

Tab	Report Name	Description
	Rank	This report contains data related to rank information. It contains historical rank information as well as the current rank. This report is not complete due to the fact that not all rank data was entered in Banner.
	Tenure	This report contains data related to tenure. This report is not complete due to the fact that not all tenure data was entered in Banner.

## Data dictionary

It is necessary to know which data is displayed in the various FastHR reports in order to be able to interpret it. The data dictionary will help you with the data interpretation when you run the various reports of FastHR.

*NOTE: The security role that we assign you in the account creation phase determines to which reports you have access to. Consequently, you will only see data contained in the various reports to which you have access.*

Name given in FastHR	Definition
Address	Civic number and street name.
Address Type	Code indicating the address type: BI Payment Address MA Mailing Address PA Parent's Address PR Permanent Home Address
Adj. Service	This is the start date in a regular position, adjusted to factor in leave without pay exceeding three months. Employees paid through a contract or grant who obtain a regular position may see their prior service recognized. This date is also used to determine annual leave accumulation by administrative employees. <ul style="list-style-type: none"> <li>As well, this date is used to determine eligibility for full benefits when employees are paid through grants even if they decline to enrol in full benefits), given that their accumulation of annual leave is based on this date.</li> <li>In the case of term employees who have had continuous employment in a specific position and who become regular employees in the same position, their adjusted service date is the date of the start of their first contract in the position in question.</li> </ul>
Age at Term	Age of the employee on the termination date.
Annual Salary	Job annual salary of the employee.
AppGross	Total amount used in the calculations of employees and employers' deductions .

Name given in FastHR	Definition
Appt %	Percentage of the position paid by the cost center. (This amount should always be 100%).
Appt Action	Decision date. In the case of a renewal, the Decision Date becomes the New Contract Start Date.
Appt Activity	Date on which data is entered in the Banner PEAFAC form.
Appt Begin	Contract begin date.
Appt Decision	Rendered decision by the Committee.
Appt Decision Date	Date on which data is entered in the Banner PEAFAC form.
Appt Effective	Contract begin date.
Appt End	Contract end date.
Assign Salary	Amount given for each pay period.
Auth Code	Board of Governors' request number.
Barg End	Bargaining unit relation end date
Barg Seniority	Bargaining unit entry date
Bargain Code	Bargaining unit code 1 7A - 772A 2 7B - 772B 3 AP - APUO 4 AT - APTPUO 5 CU - CUPE 6 EP - EXCLUDED APUO 7 NO - NONE 8 PI - PIPS 9 SS - SSUO
Bargain Desc	Bargaining unit description
Birth Date	Date of birth
Bure Code	Bargaining unit relationship code 1 AC - Membre actif 2 EL - Éligible à être membre 3 RP - Détachement pour être représentant syndical
Bure Desc	Description du code de relation avec l'unité syndicale
Chart	Banner charter of account

Name given in FastHR	Definition
City	City name
Current Hire	<p>This is the date that indicates continuous service at the University, i.e. the length of employment at the University (including contracts leading to a regular position) without breaks of more 13 consecutive weeks, as set out in Ontario's Employment Standards Act. Leave without pay is not treated as a break in employment.</p> <ol style="list-style-type: none"> <li>1 This date is used to calculate the notice period and severance pay when an employee leaves.</li> <li>2 This date is used to determine eligibility for the University of Ottawa's pension plan.</li> <li>3 This date is used to determine whether an employee is entitled to apply on internal competitions.</li> </ol>
Dedn Amt1	Deduction calculation rule - amount # 1
Dedn Amt2	Deduction calculation rule - amount # 2
Dedn Amt3	Deduction calculation rule - amount # 3
Dedn Amt4	Deduction calculation rule - amount # 4
Dedn App Gross	Amount on which are deductions calculated.
Dedn Code	Deduction code
Dedn Cal Year	Calendar year used for the total deduction paid.
Dedn Delta	Difference between two total deductions (Dedn Total A - Dedn Total B).
Dedn EE Amnt	Total deduction paid by the employee for the selected calendar year.
Dedn Effective	Deduction effective date
Dedn ER Amnt	Total deduction paid by the employer for the selected calendar year.
Dedn OptCode1	Deduction calculation rule option 1
Dedn OptCode2	Deduction calculation rule option 2
Dedn OptCode3	Deduction calculation rule option 3
Dedn OptCode4	Deduction calculation rule option 4
Dedn OptCode5	Deduction calculation rule option 5
Dedn Status	<p>Deduction Status</p> <p>A = Active deduction  E = Employee is exempted from paying the deduction  T = Terminated deduction  W = Waived deduction</p>

Name given in FastHR	Definition
Dedn Total A	Total paid for deduction for first selected pay period.
Dedn Total B	Total paid for deduction for second selected pay period.
Deduction	Deduction code
Deduction Desc	Description of the deduction code
Default Earnings	Default earnings used to pay the employee salary
Delta	Difference in earnings between two selected pay periods (in the PAYROLL EARNING COMPARISON report).
Dist ORGN	Department where the employee's correspondence is sent. Each employee has only one distribution org.
Doc Date	Date of production of the document (check or direct deposit).
Doc Type	The means by which the employee was paid (check or direct deposit).
Document	Document number (check or direct deposit).
Earning Desc	Earning code description.

Name given in FastHR	Definition
Earnings	<p>Earning code used for the payment of employees</p> <p>100 = Regular Pay - OSSTF reg  101 = Regular Pay - OSSTF term  102 = Regular Pay - APUO  103 = Regular Pay - Non APUO  104 = Regular Pay -CUPE 2626  105 = Regular Pay - Non CUPE  106 = Regular Pay - 772A  107 = Regular Pay - 772B  108 = Regular Pay - APTPUO  109 = Regular Pay - NON APTPUO  110 = APTPUO - Large Class  111 = Regular Pay - PIPS reg  112 = Regular Pay PIPS - term  113 = Regular Pay - Executive  114 = Reg Pay - Non Union Supp reg  115 = Reg Pay - Non Union Supp reg  116 = Regular Pay - Post Doc Ass.  120 = Regular Pay - Non Residents  125 = Retiree  250 = Pay - Casual Employees  251 = Pay - Work Study  260 = Pay - Casual Employee Variable  280 = Prior Period Casual Pay  300 = 4% Vacation Pay  310 = Administrative Supplement  320 = Overtime Pay 1x  321 = Overtime Pay 1.5x  322 = Overtime Pay 2x  340 = Lump Sum Payment  350 = Vacation Payout  351 = Vacation Payout Special Rate  355 = Vacation reimbursed to Univ  360 = Shift/other Premium  410 = Retirement Allow - Eligible  411 = Retirement Allow - Ineligible  420 = Bursary  421 = Sabbatical Research Grant  422 = Research Bursary</p>

Name given in FastHR	Definition
Earnings	423 = Sab. Bursary/L.Sum/Rec. 430 = Honorarium - Administrative 431 = Honorarium - Academic 440 = Prizes/Awards 460 = Post Doc - (2626-1) 480 = Commisions 490 = PER - Reported 500 = Leave W/O Pay W/O Ben 510 = Reduced Workload 512 = GFT Benefit 513 = Post Doc Benefit 520 = Sabbatical Leave 521 = Sabbatical Leave - Non Paid 530 = Long Term Disability 531 = Long Term Disability Partial 540 = Leave With Pay With Ben 550 = Maternity Leave - Top Up 551 = Maternity Leave - Non Paid 560 = Refresher Leave 570 = Begin/End Date Middle Pay 580 = Reduced Pay 590 = Direct Withdrawal Earn Code 600 = Retro Pay - OSSTF reg 601 = Retro Pay - OSSTF term 602 = Retro Pay - APUO 603 = Retro Pay - Non APUO 604 = Retro Pay - CUPE 2626 605 = Retro Pay - NON-CUPE 606 = Retro Pay - 772A 607 = Retro Pay - 772B 608 = Retro Pay - APTPUO 609 = Retro Pay - NON-APTPUO 610 = Retro Pay - APTPUO Large Class 611 = Retro Pay - PIPS reg 612 = Retro Pay - PIPS term 613 = Retro Pay - Executive 614 = Retro Pay - Non Union Supp reg 615 = Retro Pay - Non Union Supp ter 620 = Retro Pay - Non Resident 650 = Retro Pay - Casual 651 = Retro Pay - Work Study Program 700 = Retro Pay - OSSTF reg 701 = Retro Pay - OSSTF term 702 = Retro Pay - APUO 703 = Retro Pay - NON-APUO 704 = Retro Pay - CUPE 2626 705 = Retro Pay - NON-CUPE 706 = Retro Pay - 772A 707 = Retro Pay - 772B



Name given in FastHR	Definition
Earnings	708 = Retro Pay - APTPUO 709 = Retro Pay - NON-APTPUO 710 = Retro Pay - APTPUO Large Class 711 = Retro Pay - PIPS reg 712 = Retro Pay - PIPS term 713 = Retro Pay - Executive 714 = Retro Pay - Non Union Supp reg 715 = Retro Pay - Non Union Supp ter 720 = Retro Pay - Non-Resident 750 = Retro Pay - Casual 751 = Retro Pay - Work Study 752 = Retro Special Rate with Units 801 = Tuition Waiver 802 = Parking Benefit 810 = Tuit Reimb - UO 811 = Tuit Reimb - Other Univ 900 = Living Allowance 910 = Professional Allowance 920 = 5561 Conversion 925 = WSIB reimbursed 950 = GST 951 = GST (Univ Refund, 67%) 980 = 5509 Conversion NPP = Non Paid Person XDP = Dummy Dock Pay
Earnings Amnt	Total earnings per employee by earning type for a selected calendar year.
Eclass Desc	Eclass description.
Effective	Foap effective date.
EGRP Code	Variable not used.
Email Address OU Email	Email address of the employee.
Email Code	Email address type.  UO Adresse de l'Université PERS Adresse courrielle personnelle
Emp Eclass	Employee class of the employee. Usually is the Eclass of the primary job of the employee.
Emp Status	Employee status P = Partially paid leave with benefits T = Terminated employee A = Active B = Unpaid leave with benefits F = Paid leave with benefits L = Unpaid leave with no benefits

Name given in FastHR	Definition
Employee ID	Employee number.
Empr	Employer code : RP01 = Reduced employment insurance RP02 = Employment insurance
Fac BP	Variable not used.
Fac CH	Variable not used.
Fac CR	Variable not used.
Fac Disp	Variable not used.
Fac EM	Indicates if the professor has emeritus status.
Fac LV	Unknow definition.
Fac Prim Activity	Primary activity of the professor: I Instructional R Research A Administrative
Fac RK	Unknown definition.
Fac TN	Unknown defination.

Name given in FastHR	Definition
Faculty Type	Activity type for which the professor was hired  10 Teacher - no sr admin. duties 11 Dean 12 Associate Dean 13 Assistant Dean 14 Director as Dean 15 Chairperson 16 Visiting with teachig resp. 17 Researcher - non visitor 18 Researcher - visitor 19 Ass't/Associate Dir./Dept Head 20 Vice-Dean 21 Department Chair 22 Division Chair 23 Director 24 Acting Chair 25 Acting Division Chair 26 Acting Department Chair 27 Secretary 28 Deputy Chair 29 Adjunct 30 Acting Dean 31 Acting Vice-Dean 33 Acting Director
Fed Contractor	Occupational group of the Employment and Education Equity program.
Fiscal Year	Selected fiscal year (from May 1st to April 30th).
Fund	FOAP fund.
Gender	Sex  M = male F = female
High Point	Salary scale maximum.
Hist	Clicking on the tick mark opens the Position History Report.
Home ORGN	Department number of the primary job of an employee.
Home ORGN Desc	Description of the Home ORGN.
Hourly High Point	Highest hourly rate of the salary scale.
Hourly Low Point	Lowest hourly rate of the salary scale.
Hourly Mid	Standard hourly rate of the salary scale.
Point	Unknown usage.

Name given in FastHR	Definition
Hours	Number of hours worked and paid.
Inc Hist	Clicking on the tick mark will open the Position Incumbent History report.
Initial Rec	This field indicates if the tenure code was the first entered in Banner.
JL Acct	Compte de la suite du FOAP de la fonction (ljob labour distribution)
JL Activity	Date de création ou de modification du FOAP de la fonction (job labour distribution)
JL Actv	FOAP activity. The activity comes for the FOAPAL and it's not currently used.
JL Change Ind	<p>Job FOAP Modification type. Those changes are done using various Banner forms. To get the current FOAP, one must select the A code from the CHANGE_IND field.</p> <p>A - Active (current FOAP).            D - Backout (deleted)            F - Finge Backout            H - History - (the FOAP was modified in the past).</p>
JL Fund	Fund part of the FOAP.
JL Locn	Location part of the FOAPAL . We do not use the location.
JL Orgn	Department part of the FOAP (O = org = department code) .
JL Prog	Program part of the FOAP.
JL Type	<p>Cost Type - these codes are taken from Banner Finance forms.</p> <p>DC - Direct Change            DL - Direct Labour Cost Type            IL - Indirect Labour Cost Type</p>
Job Appt Pct	Percentage representing the number of hours worked by the employee in the job compared to the number of hours of the position. By default, the value is always 100% but if the employee changes his working hours, the percentage gets pro-rated according to the real number of hours worked compared to the number of hours of the position.
Job Begin	Job begin date (can differ from the date at which the employee starting working in the job).
Job Change	Change date of the job.

Name given in FastHR	Definition
Job Change Reason	Job change reason.  PROF Professional Leave PROFX Professional Leave Cancelled TERM Termination MATL Maternity Leave PARL Parental Leave REFL Refresher Leave LWP Leave Without Pay LWPX LWP Cancelled or Moved DEM Demotion ACAD Academic Leave ACADX ACAD Cancelled or Moved TRANS Transfer SFL Self-Funded Leave URED Unpaid Reduced Workload UMAT Unpaid Maternity Leave UACAD Unpaid Academic Leave ACADR Academic Leave Research Grant TEMP Temporary Assignment RETL Return from Leave LCMOD Leave Category Modification RTERM Employ Status from REG to TERM PTRH PTR Holdback Awarded LTDP Partial Long Term Disability ABOL Position Abolition ANOM Salary Anomaly INCR Salary Increase RETRO Retro Salary Increase FOAP Change in FOAPAL CHWH Change in Working Hours CREA Position Creation CANH Cancelled Hiring NEW New Employee NOUNI Non Unionized Employee PTR Progress Through the Rank PROM Promotion SAADJ Salary Adjustment RECL Reclassification RENEW Contract Renewal RLTD Return from LTD Leave SUPP Administrative Supplement OTPR One-Time Payment Rules BTW Back to Work 100% CONV Conversion LTD Long Term Disability RPTR Retro PTR WKLR Workload Reduction
Job Eclass	Job employee class.
Job Effective	Date when the job data was entered in Banner.

Name given in FastHR	Definition
Job End	Job end date.
Job Foap Effective	FOAP effective date.
Job FTE	Full-time equivalency (FTE). The FTE is a ratio representing the number of hours worked by the employee compared to the number of hours of the position.
Job Percent	FOAP percentage.
Job Status	Job status  P Partially paid leave with benefits T Terminated employee A Active employee B Unpaid leave with benefits F Paid leave with benefits L Unpaid leave with not benefit
	The is used to differentiate the jobs when the employee is assiated more than once to the same position number. The suffix is an alpha-numerical field of two characters. By default, the suffix is always 00. Normal values of the suffix range from 00 to 99 but we can also have NP (non-paid). The NP suffix indicates that the employee works less hours but wants to keep 100% of his benefits. When the employee works less than the regular hours but wants to keep 100% benefits, the deduction calculations are based on the non-paid job (with suffix NP) that shows the job regular hours and salary.
Job Title	Job title.
Label Code	Label group code
Labour Code	Unkown usage.
LC Activity	Date when the label group was modified.
Leave Action	Leave decision date.
Leave Begin	Leave begin date.

Name given in FastHR	Definition
Leave Code	<p>Employee leave type (when the employee is not active)</p> <p>10 Maternity Leave            11 Parental Leave            12 Adoption Leave            13 Extended Parental Leave            14 Extended Adoption Leave            20 Long Term Disability            21 Partial Long Term Disability            23 Sick Leave            24 Family Medical Leave            30 Academic Leave            31 Work Hours Reduction            32 Study Leave            40 Seasonal Leave            50 Personal Leave            51 Personal Emergency Leave            90 Temporary Lay-off            91 Self-funded Leave</p>
Leave Decision	Leave decision status code.
Leave Defer	Variable not used.
Leave End	Leave end date.
Leave Type	Requested leave type.
Leave Type Desc	Requested leave type description.
Low Point	Salary scale minimum.
Marital Code	<p>Marital status</p> <p>M = married            S = single            W = widow or widowed spouse of an employee</p>
Mid Point	Salary scale standard.
Name	Employee name.
Name Prefix	Name prefix (can be a civilian title such as : Dr.m Prof. Ms etc.
Name Suffix	Name suffix such as: Jr, Sr etc.
Original Hire	<p>This is an employee's initial start date at the University (including term and casual jobs). This date is never modified, even when an employee leaves the University and returns after a break in employment. This date is left intact to indicate to us that a new hire has previously worked for the University.</p>

Name given in FastHR	Definition
Pay Type	Payroll type. 1 SM (semi-monthly) 2 BW (by-weekly)
Pay Amount	Total amount given to employee for this specific earning type.
Pay Dedn	Total amount of deductions taken from gross amount.
Pay Disp Desc	Description of the Pay Disposition code  5 = Awaiting re-extract 10 = Awaiting time entry 15 = Awaiting correction 20 = Awaiting proof 22 = Hours correction 25 = Awaiting leave process 27 = Pre-Balance Calc 28 = Pre-Approve Calc 30 = Awaiting calc 37 = Pre-balance Check 38 = Pre-Approve Check 40 = Awaiting document 42 = Awaiting Check/Direct Deposit Run 43 = Awaiting Direct Deposit Run 44 = Awaiting Check Run 47 = Pre-Balance Update 48 = Pre-Approve Update 50 = Awaiting Update 60 = Finance Extract 62 = Finance Interface/Feed 70 = Complete
Pay Disposition	Code that indicates at what stage was stopped the execution of the pay of an employee. When a payroll execution was completed successfully, we will find the value 70 in the disposition code .
Pay Event	Pay period for which the payment was done.
Pay Gross	Payroll gross amount.
Pay ID	Payroll frequency:  SM=Semi-monthly BW=Bi-weekly
Pay ID Desc	Payroll frequency description.
Pay Net	Employee net amount (Pay Gross - Pay Dedn).
Pay No	Pay period number.



Name given in FastHR	Definition
Pay Type	Payroll frequency 1 SM (semi-monthly) 2 BW (bi-weekly)
Pay Type Desc	Description of the type of pay that was executed.  C = Original - payment done during the normal payroll execution cycle J = Adjustment - this code is no longer used M = Manual - a manual cheque was produced R = Redistribute - indicates that the pay was run to correct a FOAP V = Void - a cheque was cancelled I = unknown value
Pay Year	Calendar year of the selected payroll.
PG Group	Salary scale group code.
PG Group Desc	Salary scale group code description.
PG Year	Salary scale current year.
Phone Number	Telephone number.
Position	Postion number.
Posn Barg	Postition bargaining unit code.  SS SSUO AP APUO 7A 772A 7B 772B CU CUPE AT APTPUO EP EXCLUDED APUO NO NONE PI PIPS
Posn Begin	Postion start date.
Posn Change	Postion modification date.
Posn Description	Postion label group description.
Posn Eclass	Postion employee classe (eclass).
Posn End	Postion end date.
Posn ORGN	Postion org.
Posn Pclass	Postion class (pclass) of the postion.

Name given in FastHR	Definition
Posn Status	Position status.  A Active position C Canceled position F Frozen position I Inactive position
Posn Title	Position title entered by Position Control sector.
Posn Type	Position type:  S Single position P Pooled position
Postal Code	Postal code.
Pref Lang	Language of correspondence EN=English FR=French
Probation Begin	Probation begin date.
Probation End	Probation end date.
Prog	Program part of the FOAP.
Prov Contractor	Occupational group code (for Employment and Education Equity program).
Rank	Professor's rank code.
Rank Action	Committee's decision date.
Rank Begin	Professor's contract start date. Should the professor change ranks, the Rank Begin Date then becomes the start date in the new rank.
Rank Descr	Rank code description.
Rank Em	Indicates if the professor has emeritus status.
Rank Initial	Indicates if this is the first contract given to the professor.
Rank Title	Not used.
Rate	Job hourly rate.
Ref No	APTPUO pension membership number.
Reg Rate	Job hourly rate.
Reports To	Position number of the immediate supervisor (for specific regular support staff positions only).
Reports to Title	Position title of the immediate supervisor (for specific regular support staff positions only).

Name given in FastHR	Definition
Rule Amnt	Encumbered Salary Amount sent to Finance Reporting tables and reports.
Rule Code	<p>Salary encumbrancing rule code. Rules that are used to standardize the payroll batching process when the data is sent to the Finance Reporting tables and reports.</p> <p>HCBA = HCBA-COBRA - Admin. F            HCBC = HCBC-Cobra Cash Recei            HCBP = HCBP-COBRA - Premium            HDEF = HDEF-Deferred Pay            HDPA = HDPA-Deferred Pay Acc            HEEL = HEEL-Employee Liabili            HENA = HENA-Encumbrance Adju            HENC = HENC-Salary Encumbran            HERL = HERL-Employer Liabili            HFEA = HFEA-Fringe Benefit E            HFEN = HFEN-Fringe Benefit E            HFEX = HFEX-Actual Fringe Be            HFNL = HFNL-Fringe Chargebac            HFRC = HFRC-ring Chargeback            HFRD = HFRD-Fringe Chargebac            HGNL = HGNL-Gross Exp. No Li            HGRB = HGRB-Gross Benefit Ex            HGRS = HGRS-Gross Salary Exp            HNET = HNET-Net Pay            HZB1 = HZB1-Gross Benefit Ex            HZB2 = HZB2-Gross Benefit Ex            HZB3 = HZB3-Gross Benefit Ex            HZB4 = HZB4-Gross Benefit Ex            HZB5 = HZB5-Gross Benefit Ex            HZB6 = HZB6-Gross Benefit Ex            HZB7 = HZB7-Gross Benefit Ex</p>
Sal Grade	<p>Salary grade</p> <p>0 position with not salary grande (ex: pooled position)            1 to 17 Regular support staff positions            XX Support staff position not yet evaluated by the Hay Committee.            ASSIS, ASSOC, FULL, LECT = Professor's rank            LIB1 à LIB6 = Librarian's rank            LANG1 à LANG4 = Language professor's rank            CS1 à CS4 = Counsellor's rank</p>

Name given in FastHR	Definition
Sal Table	Salary scale group code  AS Enseignant/Academic CS Conseillers/Counsellors LG Prof.langue/Language Teachers LI Bibliothécaires/Librarians N1 Sout Non S/Supp Non-Union 1820 N2 Sout Non S/Supp Non-Union 1885 N3 Sout Non S/Supp Non-Union 1950 N4 Sout Non S/Supp Non-Union 2080 NO NO PAYSACLE P1 Sout IPFPC/Supp PIPS 1820 P2 Sout IPFPC/Supp PIPS 1885 P3 Sout IPFPC/Supp PIPS 1950 P4 Sout IPFPC/Supp PIPS 2080 S1 Sout PSUO/Supp SSUO 1820 S2 Sout PSUO/Supp SSUO 1885 S3 Sout PSUO/Supp SSUO 1950 S4 Sout PSUO/Supp SSUO 2080
SBTY	Variable not used.
Seniority	This is the date at which a term employee starts to accumulate seniority toward eligibility for benefits. The employee must work a minimum of 15 hours per week to be eligible.  1 This date changes every time a term employee starts a contract in a new faculty or service because the calculation of seniority for the purpose of acquiring eligibility for benefits is not transferable from one faculty or service to another. This rule also applies to term employees who are receiving reduced benefits and who then start a new contract in a new faculty or service.  2 A faculty or service may elect to recognize the seniority acquired in another faculty or service for the purpose of acquiring eligibility for benefits (at their discretion)
Seq	Payroll sequence number (0, 1, 2, 3.. etc). The first pay run for a pay period is always 0. All payroll sequence number greater than 0 are payroll executed out of the normal payroll execution cycle and they are always adjustment pay run.
Step	Variable not used.
Summary Amount	Total amount earned by employee class and earning type.
Supervisor Ind	Indicates if a position supervises or not.  SUPERV Position with supervision NOSUPV Position with no supervision
Tenure	Code that indicates if the professor has or will obtain tenure.
Tenure Cr Appt	Variable not used.
Tenure Credit	Variable not used.

Name given in FastHR	Definition
Tenure Description	Description of the code that indicates if the professor has or will obtain tenure.
Tenure Effective	Professor's tenure effective date.
Tenure Trac Begin	First contract start date.
Termination	Employee termination date.
Total A	Total earnings for the first selected pay period.
Total B	Total earnings for the second selected pay period.
Trans Acct	FOAP Account which transaction amount is charged in the General Ledger (GL).
Trans Activity	Journal entry date sent to the GL. Journal entries are created during a process that verifies and organizes payroll data which then sends the data into the different Banner Finance tables and in the various Fast Finance Reports.
Trans Amnt	Amount posted in the GL for the transaction at the transaction date.
Trans Date	Date posted date on the GL. Not necessarily the same date as the pay run date;
Trans Delta	Difference between TRANS TOTAL A et TRANS TOTAL B amounts.
Trans Fund	Fund from the F(und)OAP suite. Funds to which the transaction amount is posted in the GL.
Trans Orgn	Organization from the FO(rganization)AP suite. Funds to which the transaction amount is posted in the GL.
Trans Prog	Program from the FOAP(rogram) suite. Program to which the transaction amount is posted in the GL.
Transaction	Transaction Number. The Document Number that can be found on the GL is the same number found in Fast Finance and it corresponds to the transaction number. This number always begins with the letter F, eg. F003000. A process is executed and this same process picks up the payroll data to organize them to create journal entries. The journal entry number corresponds to the transaction number and to the document number in Fast Finance.
TS ORGN	The timesheet org is the job department. The timesheet org is used to organize security in FastHR. An employee has as many timesheet orgs as he has jobs. The timesheet org corresponds to the old job department. The timesheet org is also the organization code of the timesheet.

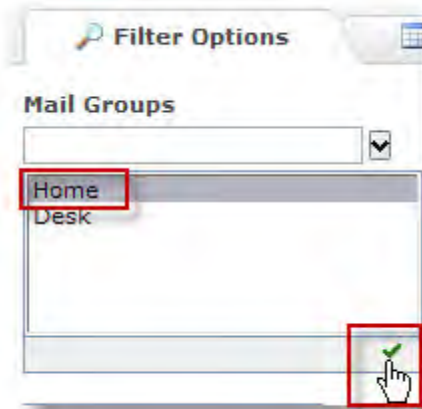
## Faculty or service employee list with home addresses

You must generate a list of the home addresses of the teaching staff of your faculty or service. To do this, you must use the EMPLOYEE SUMMARY report.

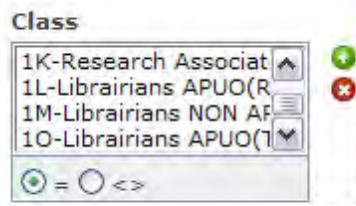
1. Select the Employee Mail List report, which is found under the Employee tab.



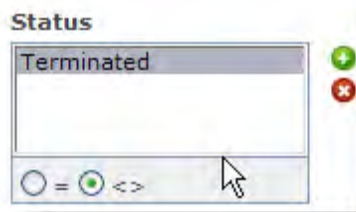
2. Select the Home option in the Mail Groups filter and click on the small green check mark.



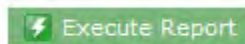
3. Select the ECLASSES that start with 1 (1A, 1B, 1C through 1P). All ECLASSES that start with 1 are employees classes made up of teaching staff.



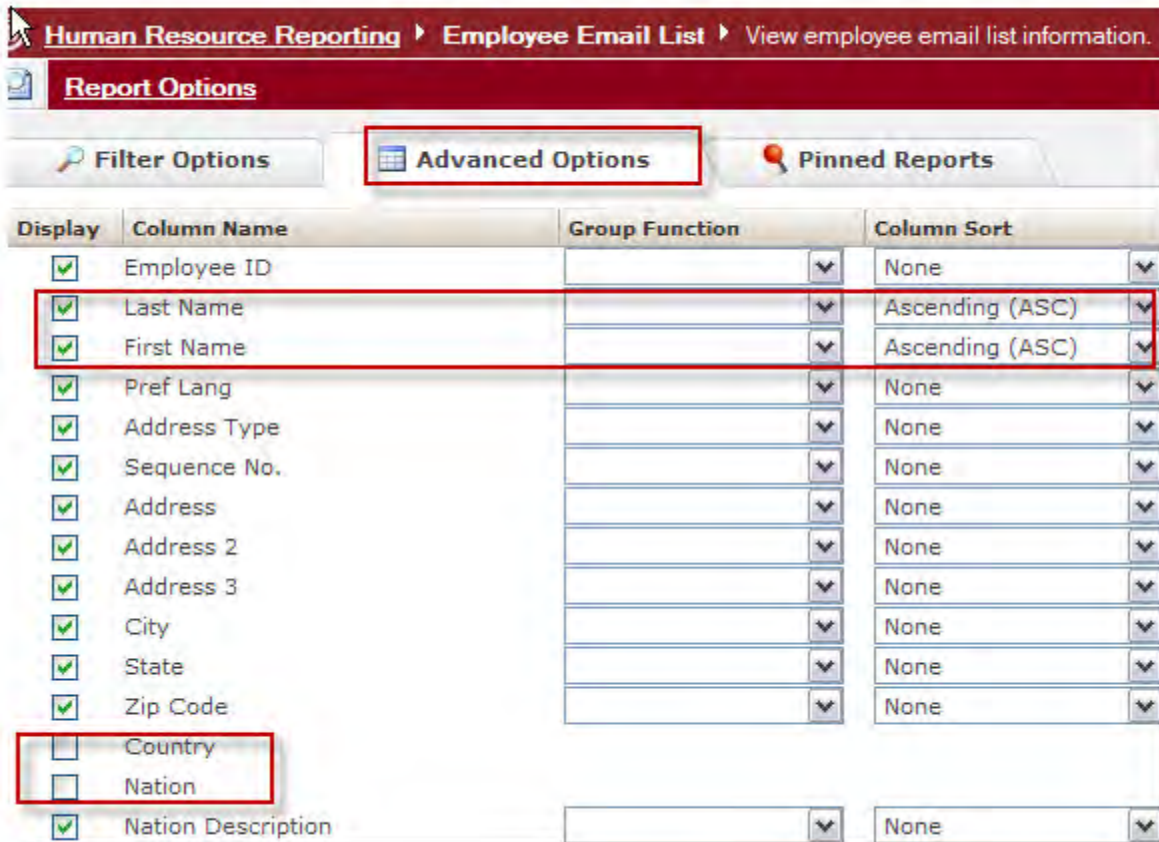
4. Select TERMINATED status and the operator <> to exclude employees whose status is "terminated."



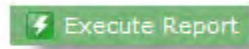
5. Click on Execute Report to initiate the execution of the report.



6. All the report variables appear by default. To remove one or more of these, click on the Advanced Options tab and remove the check marks from the boxes next to the variables Country and Nation (country name is found under the Nation Description variable). Then sort the report in ascending order (from A to Z) on the variables Last Name and First Name.



7. Click on Execute Report.



8. Click on the following icon to export the data into an Excel file.
- 



## List of employees over (for example) age 50

You must generate a list of employees over, for example, age 50, in order to start compiling a survey of employees who may retire within the next few years.

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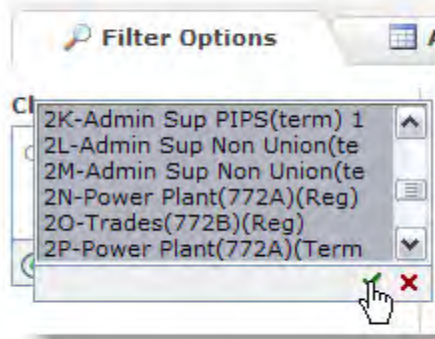
1. Place your cursor on the EMPLOYEES tab and select the EMPLOYEE SUMMARY report.



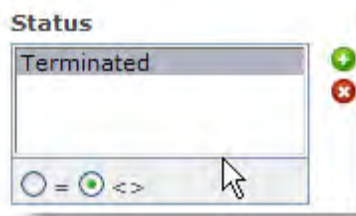
2. Place your cursor on the CLASS filter and select the employee classes you wish to target. If you wish to obtain a full list of support staff, you must select all employee classes starting with 2.



However, if you only want regular staff, please refer to the list of ECLASSes and PCLASSes found on the Human Resources Service home page, in the FUSION GUIDE section.

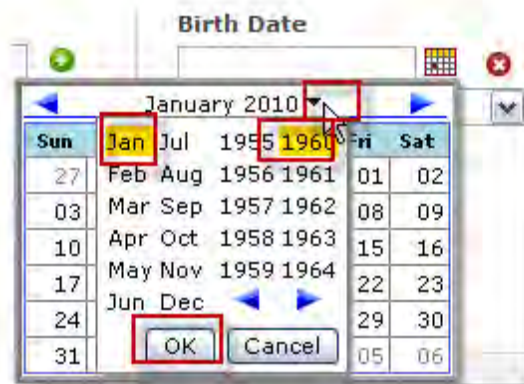


3. Place your cursor on the Status filter, select "terminated" status.
4. Select the operator illustrated below to exclude staff whose status is "terminated".

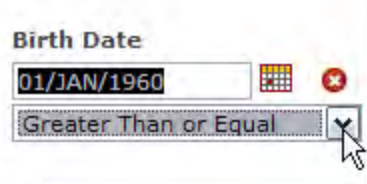


5. Place your cursor on the Birth Date filter.

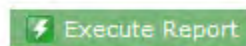
- 6. Enter the birth date from which employees may be aged 50 or over (e.g. if the current date is January 1, 2010, you should enter January 1, 1960) or use the calendar function and click on the date to be selected.



- 7. Select the date operator. If you want everyone born on or before a certain date, choose the operator "Less than or equal to".



- 8. Click on the Execute Report icon as illustrated below to initiate the execution of the report.

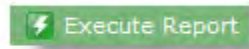


- 9. Click on the Advanced Options tab to select the variables that must appear in the report and to modify the sort (as needed). In the following illustration, certain variables were removed and a sort by employee name was performed.

The screenshot shows the 'Report Options' interface with the 'Advanced Options' tab selected. The interface includes a breadcrumb trail: 'Human Resource Reporting > Employee Summary > View employee summary information'. Below the breadcrumb, there are three tabs: 'Filter Options', 'Advanced Options' (highlighted with a red box), and 'Pinned Reports'. The main area contains a table with the following columns: 'Display', 'Column Name', 'Group Function', and 'Column Sort'. The 'Display' column contains checkboxes, some of which are checked. The 'Column Name' column lists various employee attributes. The 'Group Function' column contains dropdown menus. The 'Column Sort' column contains dropdown menus, with 'Ascending (ASC)' selected for the 'Name' row. A red box highlights the 'Name' row, and a mouse cursor is pointing at the 'None' dropdown for 'Birth Date'.

Display	Column Name	Group Function	Column Sort
<input type="checkbox"/>	Pref Lang		
<input checked="" type="checkbox"/>	Employee ID		None
<input checked="" type="checkbox"/>	Name		Ascending (ASC)
<input checked="" type="checkbox"/>	Birth Date		None
<input type="checkbox"/>	Gender		
<input type="checkbox"/>	Status		
<input checked="" type="checkbox"/>	Class		None
<input type="checkbox"/>	Barg Units		
<input checked="" type="checkbox"/>	Original Hire		None
<input checked="" type="checkbox"/>	Current Hire		None
<input checked="" type="checkbox"/>	Adj Service		None
<input checked="" type="checkbox"/>	Seniority		None
<input type="checkbox"/>	Termination		
<input checked="" type="checkbox"/>	Home ORGN		None
<input type="checkbox"/>	Dist ORGN		
<input type="checkbox"/>	DICD		
<input type="checkbox"/>	BARG		
<input type="checkbox"/>	Leave Code		
<input type="checkbox"/>	Legal Name		
<input type="checkbox"/>	Marital Code		
<input type="checkbox"/>	Name Prefix		
<input type="checkbox"/>	Name Suffix		
<input type="checkbox"/>	Email		

10. Click on the Execute Report icon to initiate the execution of the report.



11. Click on Export to Excel to export your data into Excel.

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## Employee list by home department (HOME DEPARTMENT ORG)

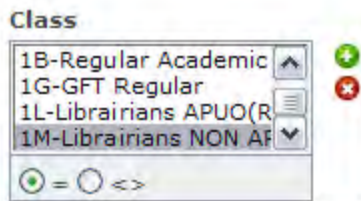
You must generate a list of regular teaching staff by home department. To generate this type of list, you may use the EMPLOYEE SUMMARY report under the EMPLOYEES tab.

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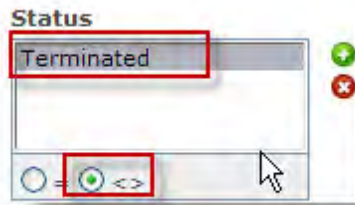
1. Place your cursor on the EMPLOYEES tab and select the EMPLOYEE SUMMARY report.



2. Place your cursor on the CLASS filter and select the employee classes 1A, 1B, 1G, 1L and 1M, which are classes of regular teaching staff. All employee classes starting with 1 are made up of teaching staff.



- Place your cursor on the Status filter, select "terminated" status and select the operator Exclude as illustrated.



- All the report variables appear by default. To remove one or more of these, click on the Advanced Options tab and remove the check marks from the boxes next to the variables that you do not

wish to appear in the report. The sort that your report performs may also be modified using the Column Sort column as illustrated below.

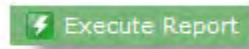
**Human Resource Reporting** ▶ **Employee Summary** ▶ View employee summary information

**Report Options**

**Filter Options**   **Advanced Options**   **Pinned Reports**

Display	Column Name	Group Function	Column Sort
<input type="checkbox"/>	Pref Lang		
<input checked="" type="checkbox"/>	Employee ID	<input type="text"/>	None
<input checked="" type="checkbox"/>	Name	<input type="text"/>	Ascending (ASC)
<input type="checkbox"/>	Birth Date		
<input checked="" type="checkbox"/>	Gender	<input type="text"/>	None
<input checked="" type="checkbox"/>	Status	<input type="text"/>	None
<input checked="" type="checkbox"/>	Class	<input type="text"/>	None
<input type="checkbox"/>	Barg Units		
<input type="checkbox"/>	Original Hire		
<input type="checkbox"/>	Current Hire		
<input checked="" type="checkbox"/>	Adj Service	<input type="text"/>	None
<input type="checkbox"/>	Seniority		
<input type="checkbox"/>	Termination		
<input checked="" type="checkbox"/>	Home ORGN	<input type="text"/>	None
<input type="checkbox"/>	Dist ORGN		
<input type="checkbox"/>	DICD		
<input type="checkbox"/>	BARG		
<input type="checkbox"/>	Leave Code		
<input type="checkbox"/>	Legal Name		
<input type="checkbox"/>	Marital Code		
<input type="checkbox"/>	Name Prefix		
<input type="checkbox"/>	Name Suffix		
<input type="checkbox"/>	Email		

- Click on Execute Report after you have deselected the unneeded fields.



- Click on Export to Excel to export your data into Excel.



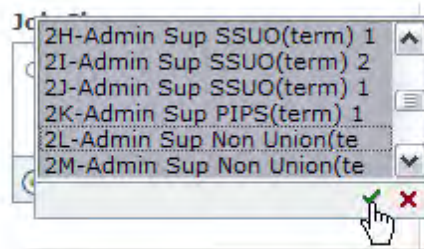
## Report on contract end dates

You must generate a list of employees whose contract will end on a certain date.

- Place your cursor on the JOB tab, then select the JOBS report and the CURRENT JOBS report.



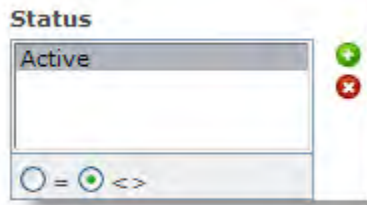
- Place your cursor on the JOBCLASS filter and select the employee classes you want to target. If you want to generate a list of temporary support staff, you must select the following employee classes: 2H, 2I, 2J, 2K, 2L, 2M, 2P and 2Q.



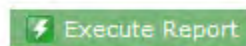
- Place your cursor on the STATUS filter.



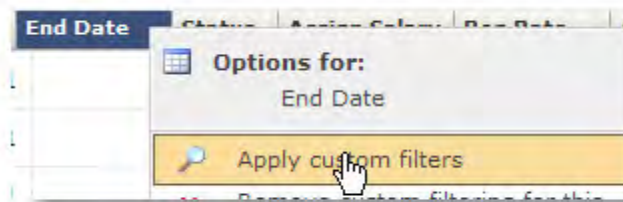
4. Click on TERMINATED.
5. Select the operator to exclude staff whose status is "terminated".



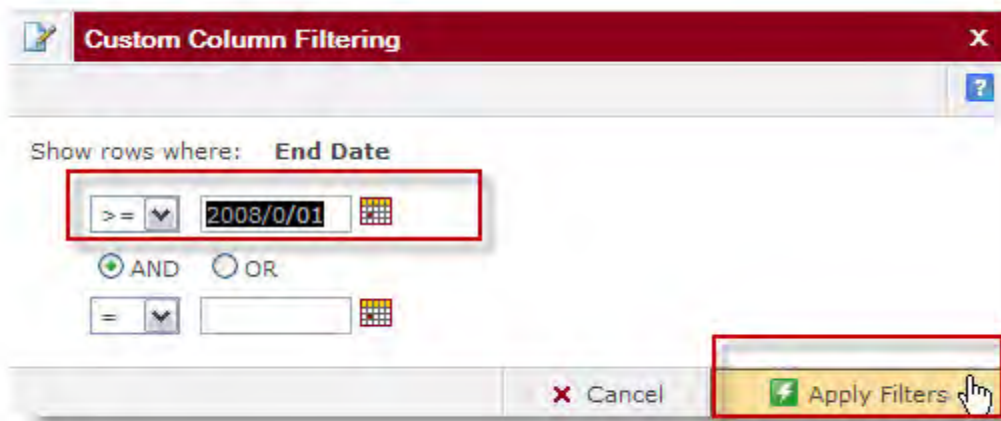
6. Click on Execute Report.



7. Place your cursor on the END DATE variable, click on the name of the variable and select Apply Custom Filters.



8. Type the end date from which employees may have terminated their contract. For example, if you wish to obtain a list of the employees whose contract will terminate on or before April 30, 2009, you must enter 20090430 (YYYYMMDD). After you enter the date, FastHR will reformat it according to the correct standard. Select the date operator. If you want to have all the contracts that will terminate on or before a date, choose the operator >=.





9. Click on Report Options.



All the report variables appear by default. To remove one or more of these, click on the Advanced Options tab and remove the check marks from the boxes next to the variables that you do not wish to appear in the report. The sort that your report performs may also be modified using the Column Sort column as illus-

trated below. Remove the tick marks from the small boxes to deselect the fields that you do not wish to have in the report.

The screenshot shows the 'Filter Options' tab in the FASTHR report configuration interface. It displays a table with four columns: 'Display', 'Column Name', 'Group Function', and 'Column Sort'. The 'Display' column contains checkboxes for each field. The 'Column Sort' column contains dropdown menus for each field. The 'Name' field is highlighted with a red box, and its sort option 'Ascending (ASC)' is also highlighted with a red box.

Display	Column Name	Group Function	Column Sort
<input checked="" type="checkbox"/>	Position		None
<input checked="" type="checkbox"/>	Suff		None
<input checked="" type="checkbox"/>	Description		None
<input checked="" type="checkbox"/>	Employee ID		None
<input checked="" type="checkbox"/>	Name		Ascending (ASC)
<input checked="" type="checkbox"/>	Home ORGN		None
<input type="checkbox"/>	Effective		
<input type="checkbox"/>	Begin Date		
<input checked="" type="checkbox"/>	End Date		None
<input checked="" type="checkbox"/>	Status		None
<input type="checkbox"/>	Assign Salary		
<input type="checkbox"/>	Reg Rate		
<input type="checkbox"/>	Annual Salary		
<input checked="" type="checkbox"/>	Class		None
<input type="checkbox"/>	Change Reason		
<input type="checkbox"/>	Sal Table		
<input type="checkbox"/>	Sal Grade		
<input type="checkbox"/>	Sal Step		
<input type="checkbox"/>	Distribution Chart		
<input type="checkbox"/>	Distribution Orgn		
<input type="checkbox"/>	Bargain Code		
<input type="checkbox"/>	Job Change Date		
<input type="checkbox"/>	Bargain Desc		
<input type="checkbox"/>	Probation Begin Date		
<input type="checkbox"/>	Probation End Date		
<input type="checkbox"/>	Job Appt Pct		
<input type="checkbox"/>	Default Earnings		
<input type="checkbox"/>	Labour Codes		

10. Click on Execute Report after having deselected the unneeded fields and modified the sort.
  11. Click on Export to Excel to export your data into Excel.
- 



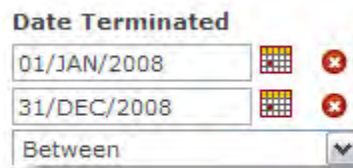
## List of regular employees having left the University between January 1 and December 31, 2008

You must generate a list of all the employees having left the University between (for example) January 1, 2008 and December 31, 2008.

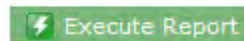
1. Place your cursor on the EMPLOYEES tab and select the TERMINATION LISTING report.



2. Place your cursor on the DATE TERMINATED filter.
3. Select the operator BETWEEN.
4. Enter 20080101 in the first box (FastHR will reformat the date correctly).
5. Click on Tab.
6. Enter 20081231 in the second box.



7. Click on Execute Report to initiate the execution of the report.



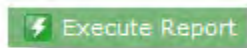
8. Click on Report Options.



9. All the report variables appear by default. To remove one or more of these, click on the Advanced Options tab and remove the check marks from the boxes next to the variables that you do not wish to appear in the report. The sort that your report performs may also be modified using the Column Sort column as illustrated below.



10. Click on Execute Report to initiate the execution of the report.



11. Click on Export to Excel to export your data into Excel.



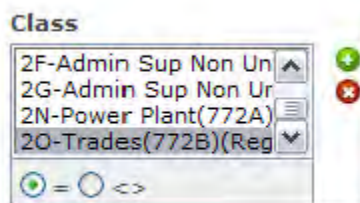
## List of a faculty's regular employees with 25 or more years of seniority

You would like to know which employees in your faculty have 25 or more years of seniority.

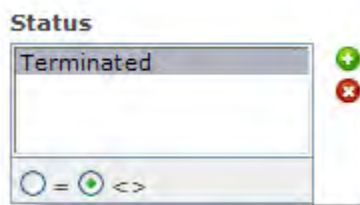
1. Select the EMPLOYEE ANNIVERSARY report under the EMPLOYEES tab.



2. Find the CLASS filter.
3. Select the regular employee classes, which are: 1A, 1B, 1G, 1L, 1M, 2A, 2B, 2C, 2D, 2E, 2F, 2G, 2H, 2N and 2O). The intention is to exclude students (classes starting with 3), retirees and those on LTD (classes starting with 4) and casual and non-paid employees (classes starting with 5).
4. Select the operator = because all employees whose employee class is equal to the selected values are being sought.

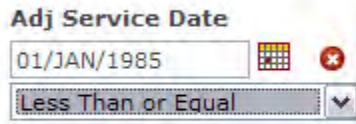


5. Find the STATUS filter.
6. Click on TERMINATED.
7. Select the operator to exclude employees whose status is "terminated."



8. Click on the Adj Service Date filter and type, for example, January 1, 1984.

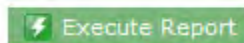
- 9. Select the operator >= (you wish to include all employees who started working before January 1, 1984).



- 10. All the report variables appear by default. To remove one or more of these, click on the Advanced Options tab and remove the check marks from the boxes next to the variables that you do not wish to appear in the report. The sort that your report performs may also be modified using the Column Sort column as illustrated below.



- 11. Click on Execute Report to start the report execution.



- 12. Click on Export to Excel.



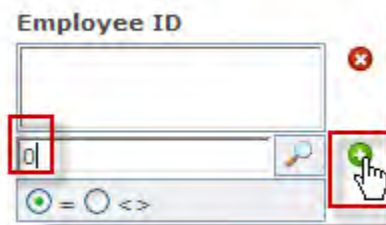
## List of regular support positions that are vacant

You need a list of regular support positions that are vacant within your faculty.

1. Place your cursor on the POSITIONS tab and select the ALL CURRENT POSITIONS report.



2. Type the number zero (0) in the Employee ID field box and click on the small green plus sign (+).



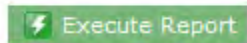
3. All the report variables appear by default. To remove one or more of these, click on the Advanced Options tab and remove the check marks from the boxes next to the variables that you do not



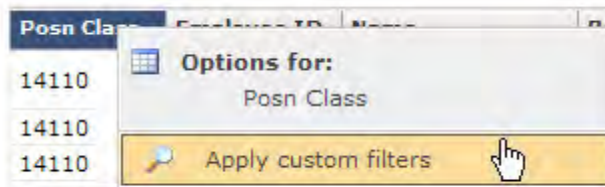
wish to appear in the report. The sort that your report performs may also be modified using the Column Sort column as illustrated below.

Display	Column Name	Group Function	Column Sort
<input checked="" type="checkbox"/>	Job Posn		None
<input checked="" type="checkbox"/>	Type		None
<input checked="" type="checkbox"/>	Posn. Status		None
<input type="checkbox"/>	Appt %		
<input checked="" type="checkbox"/>	Title		None
<input type="checkbox"/>	Begin Date		
<input type="checkbox"/>	End Date		
<input checked="" type="checkbox"/>	Job Class		None
<input checked="" type="checkbox"/>	Posn Class		None
<input checked="" type="checkbox"/>	Emp Num		None
<input checked="" type="checkbox"/>	Name		None
<input type="checkbox"/>	Reports To		
<input type="checkbox"/>	Reports to Title		
<input type="checkbox"/>	Hist		
<input type="checkbox"/>	Inc Hist		
<input type="checkbox"/>	Fed Contractor		
<input type="checkbox"/>	Prov Contractor		
<input type="checkbox"/>	Auth Code		
<input type="checkbox"/>	Comment		
<input type="checkbox"/>	Job Location		
<input checked="" type="checkbox"/>	Orgn		None

4. Click on Execute Report to initiate the execution of the report.

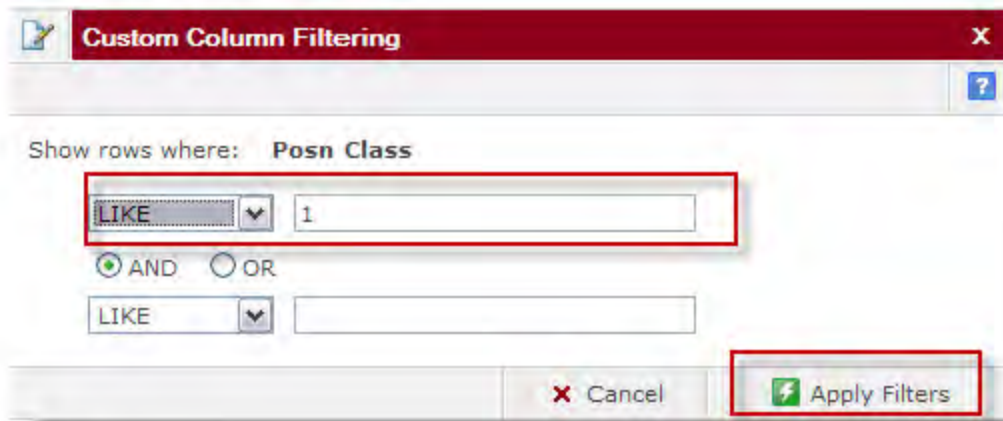


5. Click on the Posn Class field and select Create Custom Filter.





6. Select the operator Like and type the number 1 in the box to the side, then click on Apply Filters.



7. Click on Export to Excel to export your data into Excel.



## Report on earnings received by one or more employees

You wish to know the total amount that an employee has received in employment earnings in your faculty.

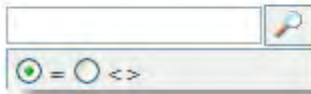
1. Select the PAYROLL EARNINGS DETAILS report under the PAYROLL tab.



2. Place your cursor on the Employee ID variable.



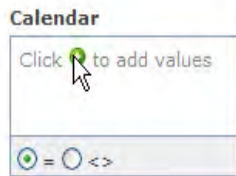
3. Type the number of the employee you are seeking in the box.



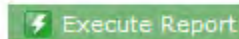
4. Click on the small plus sign (+) to apply the employee number.



5. Find the Calendar filter.



6. Select one or more calendar years, as needed.
7. Click on Execute Report.



8. Click on Export to Excel to export your data into Excel.



## List of all single positions of your faculty/service

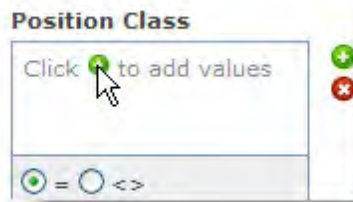
You need to generate a list of the single positions belonging to your faculty.

---

1. Place your cursor on the POSITIONS tab and select the ALL CURRENT POSITIONS report.



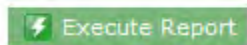
2. Place your cursor on the POSITION CLASS filter and select ALL the position classes.



- 3. Click on the Advanced Options tab. Then select the variables that you want to appear in the report, as well as the report sort.

Display	Column Name	Group Function	Column Sort
<input checked="" type="checkbox"/>	Job Posn		None
<input checked="" type="checkbox"/>	Type		None
<input checked="" type="checkbox"/>	Posn. Status		None
<input type="checkbox"/>	Appt %		
<input checked="" type="checkbox"/>	Title		None
<input type="checkbox"/>	Begin Date		
<input type="checkbox"/>	End Date		
<input checked="" type="checkbox"/>	Job Class		None
<input checked="" type="checkbox"/>	Posn Class		None
<input checked="" type="checkbox"/>	Emp Num		None
<input checked="" type="checkbox"/>	Name		None
<input type="checkbox"/>	Reports To		
<input type="checkbox"/>	Reports to Title		
<input type="checkbox"/>	Hist		
<input type="checkbox"/>	Inc Hist		
<input type="checkbox"/>	Fed Contractor		
<input type="checkbox"/>	Prov Contractor		
<input type="checkbox"/>	Auth Code		
<input type="checkbox"/>	Comment		
<input type="checkbox"/>	Job Location		
<input checked="" type="checkbox"/>	Orgn		None

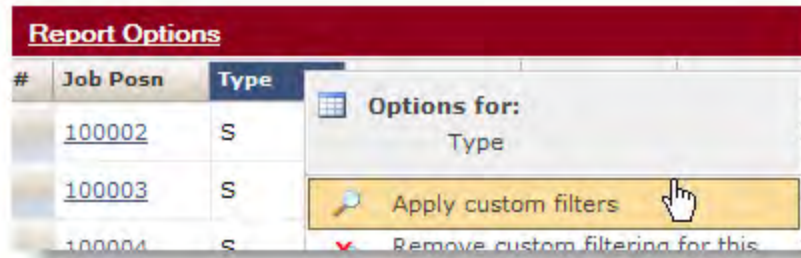
- 4. Click on Execute Report.



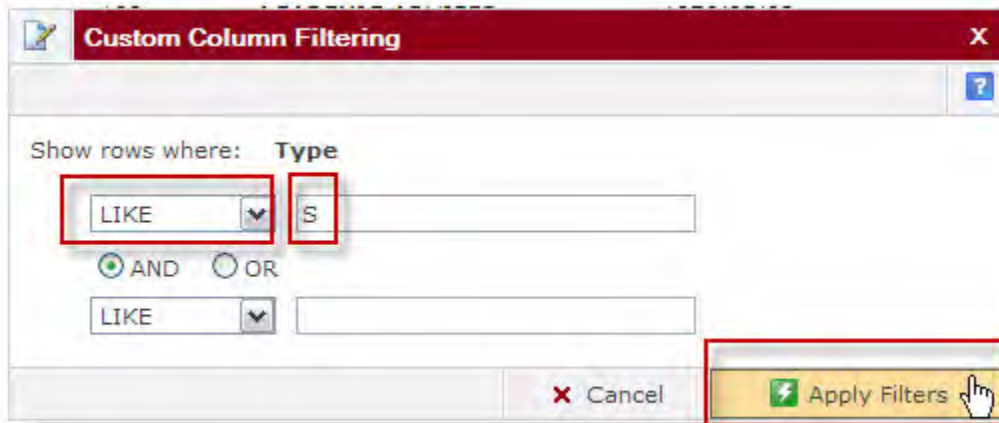
- 5. Click on the TYPE field.

#	Job Posn	Type	Posn
100002		S	Type A
100003		C	A

6. Select Apply Custom Filters.



7. Select the operator LIKE.
8. Type S (=single type position).
9. Click on APPLY FILTERS.



10. Click on Export to Excel.



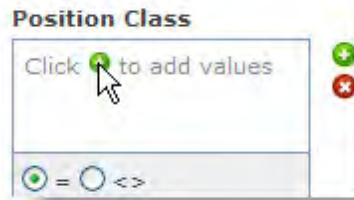
## List of PCLASS codes

You want to generate a list of all the positions in your faculty in order to determine which Pclass (Position Class) codes they belong to.

1. Place your cursor on the POSITIONS tab and select the ALL CURRENT POSITIONS report.



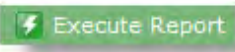
2. Place your cursor on the POSITION CLASS filter and select ALL the position classes.



3. Click on the Advanced Options tab. Then select the variables that you wish to appear in the report, as well as the report sort.

Display	Column Name	Group Function	Column Sort
<input checked="" type="checkbox"/>	Job Posn		None
<input checked="" type="checkbox"/>	Type		None
<input checked="" type="checkbox"/>	Posn. Status		None
<input type="checkbox"/>	Appt %		
<input checked="" type="checkbox"/>	Title		None
<input type="checkbox"/>	Begin Date		
<input type="checkbox"/>	End Date		
<input checked="" type="checkbox"/>	Job Class		None
<input checked="" type="checkbox"/>	Posn Class		None
<input checked="" type="checkbox"/>	Emp Num		None
<input checked="" type="checkbox"/>	Name		None
<input type="checkbox"/>	Reports To		
<input type="checkbox"/>	Reports to Title		
<input type="checkbox"/>	Hist		
<input type="checkbox"/>	Inc Hist		
<input type="checkbox"/>	Fed Contractor		
<input type="checkbox"/>	Prov Contractor		
<input type="checkbox"/>	Auth Code		
<input type="checkbox"/>	Comment		
<input type="checkbox"/>	Job Location		
<input checked="" type="checkbox"/>	Orgn		None

4. Click on Execute Report.



5. Click on Export to Excel.



## List of employee email addresses

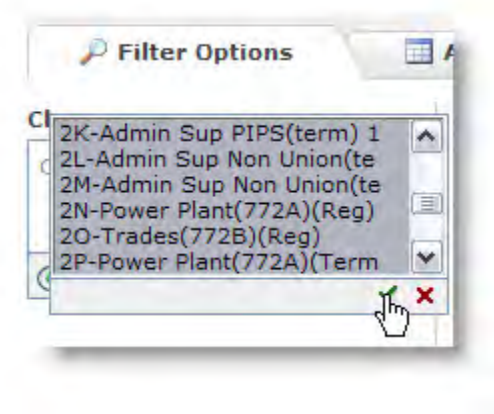
You need a list of the email addresses of the employees in your faculty.

---

1. Place your cursor on the EMPLOYEES tab and select the EMPLOYEE SUMMARY report.



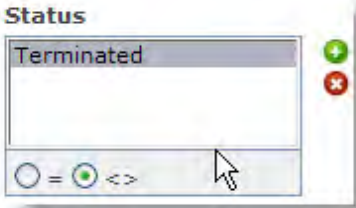
2. Place your cursor on the CLASS filter and select the employee classes that you want to target. If you want to generate a list of all support staff, you must select all the employee classes starting with 2. However, if you only want the regular staff, please refer to the list of ECLASSES and PCLASSES on the Human Resources Service home page, in the FUSION GUIDE section.



Employee class 5A corresponds to casual employees paid through time sheets. When a job is created for a casual employee, the job remains active and the employee's status indicates Active. However, the employee is only paid when a time sheet is submitted. Therefore, although you wish to generate a list of "non-terminated" employees, you must exclude employee class 5A since this employee status is not real.



- 3. Place your cursor on the STATUS filter.
- 4. Click on TERMINATED.
- 5. Select the operator indicated below to exclude employees whose status is "terminated."

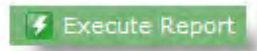


- 6. Click on the Advanced Options tab and select the variables that you wish to appear in the report, as well as the report sort.

Filter Options   **Advanced Options**   Pinned Reports

Display	Column Name	Group Function	Column Sort
<input checked="" type="checkbox"/>	Job Posn		None
<input checked="" type="checkbox"/>	Type		None
<input checked="" type="checkbox"/>	Posn. Status		None
<input type="checkbox"/>	Appt %		
<input checked="" type="checkbox"/>	Title		None
<input type="checkbox"/>	Begin Date		
<input type="checkbox"/>	End Date		
<input checked="" type="checkbox"/>	Job Class		None
<input checked="" type="checkbox"/>	Posn Class		None
<input checked="" type="checkbox"/>	Emp Num		None
<input checked="" type="checkbox"/>	Name		None
<input type="checkbox"/>	Reports To		
<input type="checkbox"/>	Reports to Title		
<input type="checkbox"/>	Hist		
<input type="checkbox"/>	Inc Hist		
<input type="checkbox"/>	Fed Contractor		
<input type="checkbox"/>	Prov Contractor		
<input type="checkbox"/>	Auth Code		
<input type="checkbox"/>	Comment		
<input type="checkbox"/>	Job Location		
<input checked="" type="checkbox"/>	Orgn		None

7. Click on Execute Report.



8. Click on Export to Excel.
- 



## Producing an org chart

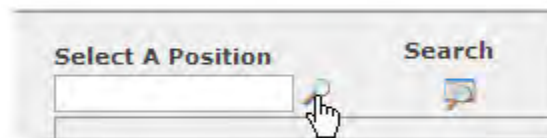
It is possible to produce an org chart with FastHR but you will need a license of the Visio software to be able to do it. FastHR creates an excel file containing the information of regular positions with their subordinate positions. This file is then used to create the structure of the positions in Visio to produce the org chart.

---

1. Select the Org Chart of the Employees' tab.



2. Click on the magnifying glass of the Select a Position field.



3. Type the position number of the highest rank of the Org Chart in the Position code field and click on Search.

Select A Position Search

Position Code 101103

Position Desc

Employee Number

Employee Name

Search

4. Click on the line containing the position number type in the previous step.

1 record(s) found

Search

POSN	POSN_DESC	EMPLOYEE_ID	NAME	INTERNAL_ID
101103	Associate V-P, Human	100216221	Griessenauer-Kolley	5 100211

5. Click on the Search icon.

Human Resource Reporting Employee Tree View employee detail i

Position Description

Select A Position 101103

Search

6. The information of the position appears on the right hand section.

Employee Detail Information	
Employee Number: 100211961 Name: Griessenauer-Kolley, Thomas Birthdate: 13-09-1990 Gender: F ECLS: 2A	
Important Dates	Position Details
First Hire: 04-01-2010 Current Hire: 04-01-2010 Term Date: End Date: Seniority Date: 04-01-2010	Posn: 101103 Suff: 00 Description: Associate V-P, Human Resources EMPR: RP01 Emp Status: A FTE: 1
Salary Information	Leave Information
SAL Step: 0 SAL GRADE: 00 SAL TABLE: NO Per Pay Salary: Annual Salary: Assign Salary: Reg Rate:	LREA: Effective Date: 01-JAN-2010 TREA: Status: A



The position that you need to find might be “hidden” under the “supervising” position. Therefore, you must first begin to find the “supervising position” and click on it to show the subordinate positions. For example, you need to prepare an org chart for position 101865 but you can’t find it on the list, you must

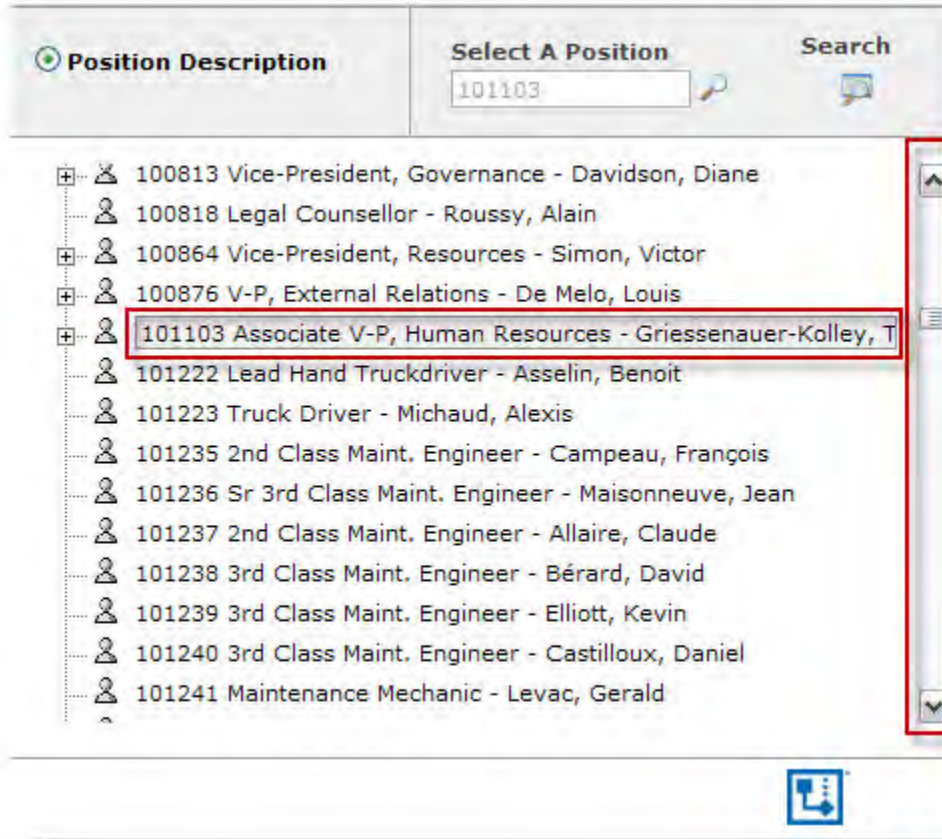
then find the "supervising" position (101595) and click on it and then you will be able to select the position 101865.

The screenshot displays the 'Human Resource Reporting' interface, specifically the 'Employee Tree' view. The breadcrumb navigation shows 'Human Resource Reporting > Employee Tree > View employee detail in'. Below the navigation, there is a 'Position Description' tab and a 'Select A Position' dropdown menu. A search bar is also present. The main area shows a list of positions, with position 101865, 'Executive Dir., Research Adm.', highlighted by a red box. A callout box points to this position with the text: 'To create an orgchart for position 101865, one must first find the supervisor position (101595) and click on it to show subordinate positions'.

Position ID	Position Description
100000	ASSOC V-P, INST. RES. & FIN. - VACANT
101243	3rd Class Maint. Engineer - VACANT
101244	3rd Class Maint. Engineer - VACANT
101257	Technician 1A - VACANT
101316	Groundsperson - VACANT
101324	Plumber - VACANT
101454	Medical Secretary - VACANT
101557	Management And Prof. SSUO 1820 - VACANT
101595	Vice-President, Research - VACANT
101865	Executive Dir., Research Adm.
101866	Project Mgr & Policy Advisor
101867	Dir., Research Communications
102079	Director, Intern. Research - Jorja
102217	Executive Ass.To VP Research -
102400	Director Res. Ethics Integrit.



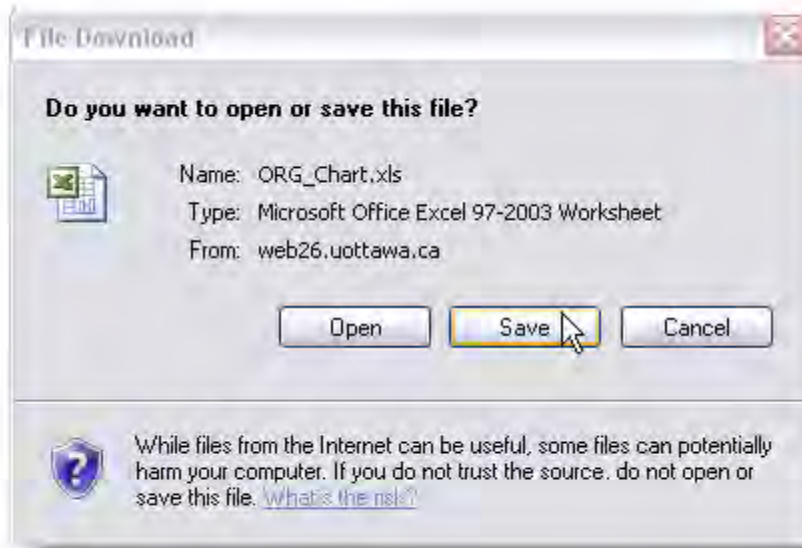
- Find the position number in the left hand part with the help of the scroll bar. The positions are sorted by numerical order of the position number to facilitate the research.



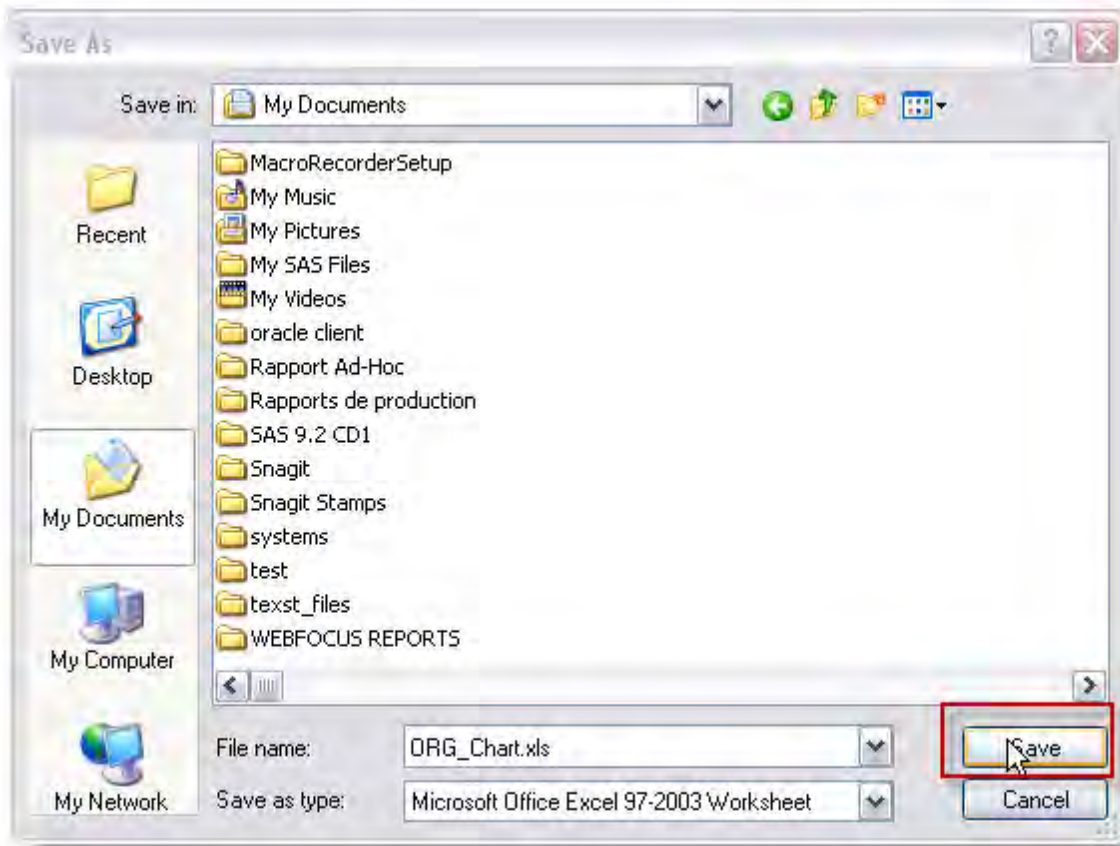
- Click on the position number and click on the Visio Icon.



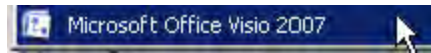
9. Click on Save to save the Excel file.



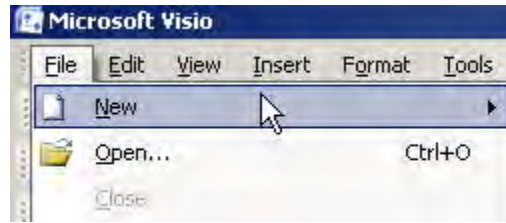
10. Save the file that you will be importing in Visio.



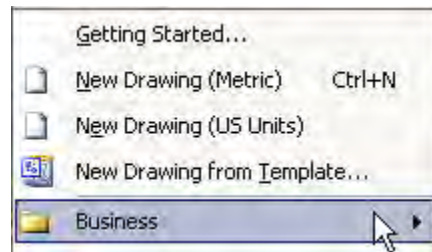
11. Open the Visio Software.



12. Click on File and select NEW.



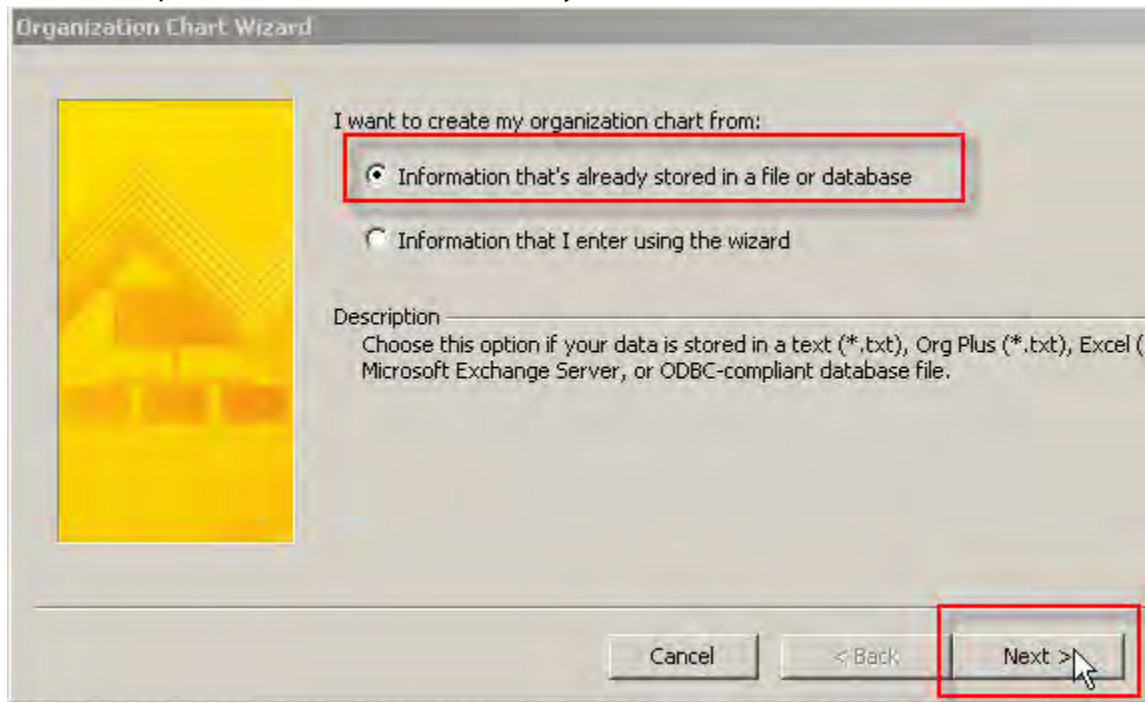
13. Select Business.



14. Select Org Chart Wizard (US units).

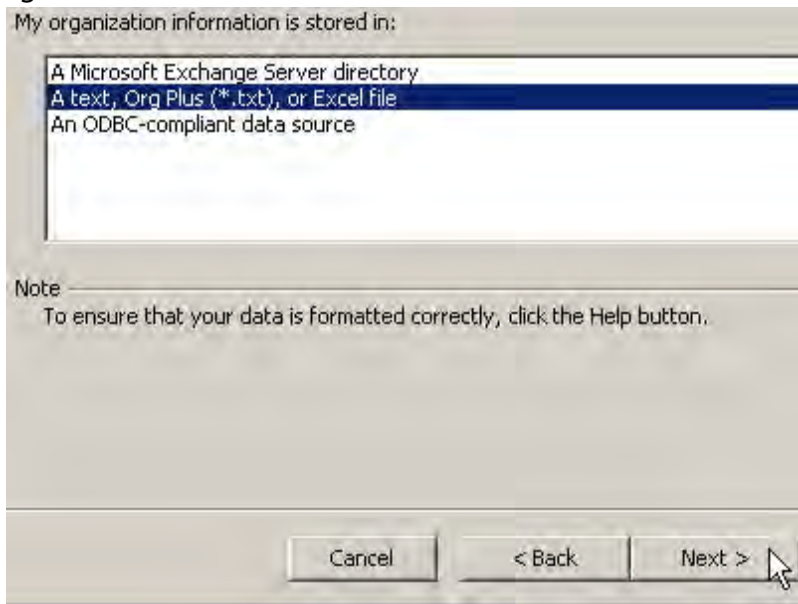


15. Click on the option Information that's already stored in a file or database and click on Next.





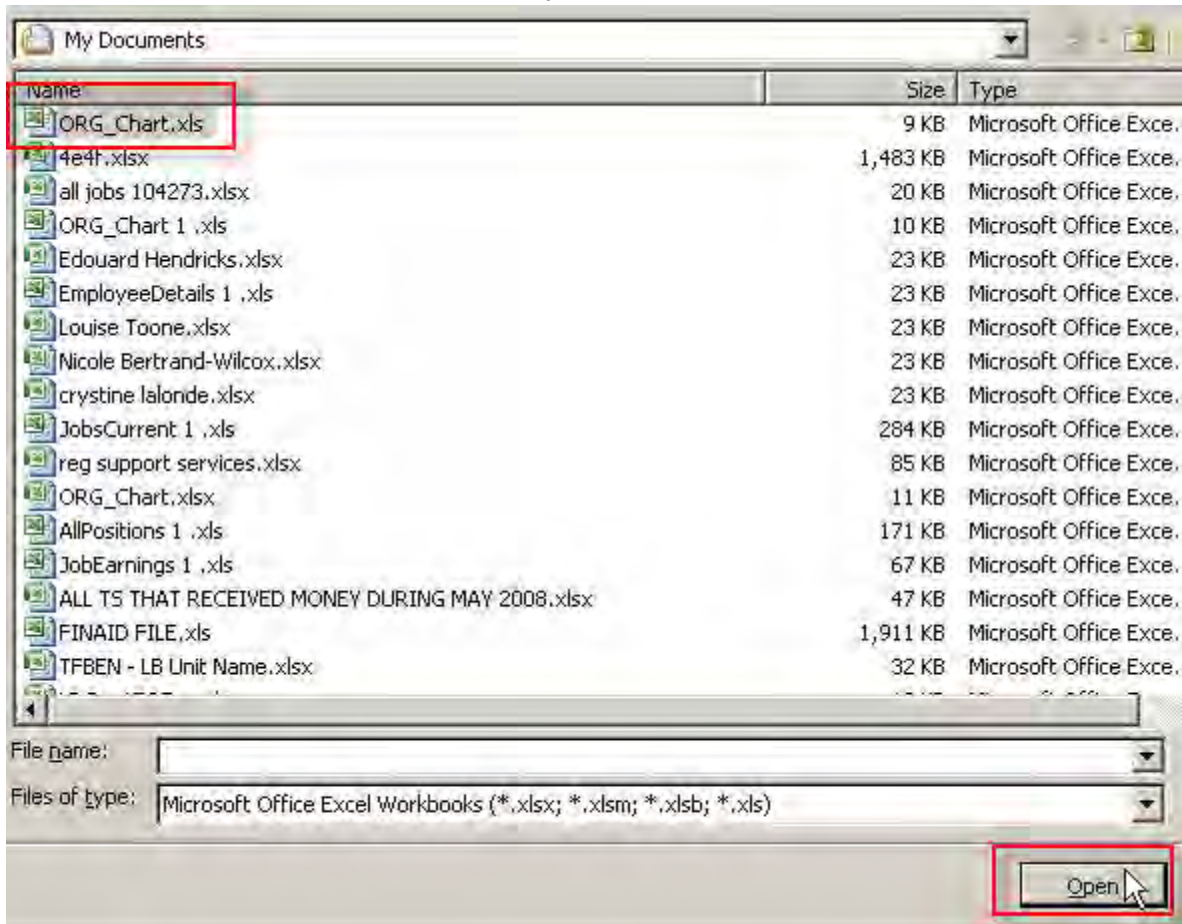
16. Select A text, Org Plus (\*.txt), or Excel file and click on Next.



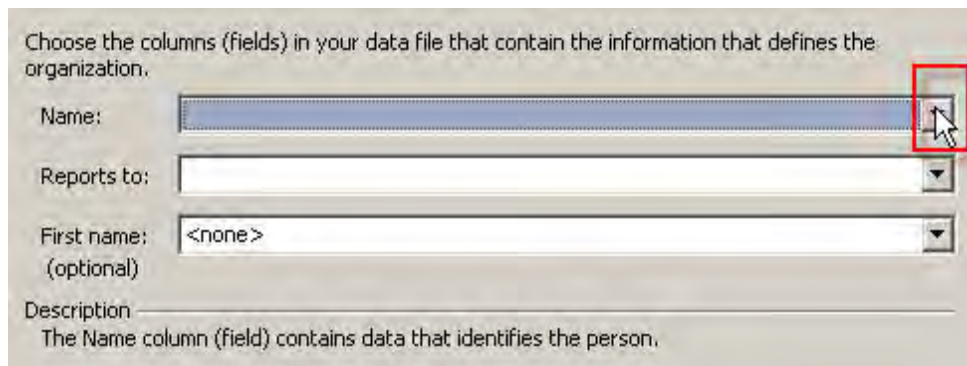
17. Click on Browse to find the Excel file that you created using FastHR.



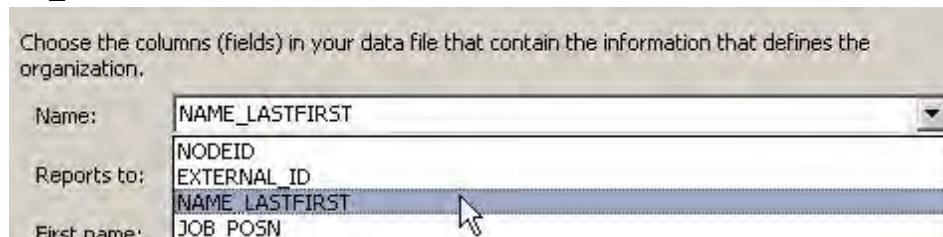
18. Click on the Excel filename and click on Open.



19. Click on the arrow at the end of Name.



20. Select Name\_LastFirst.



21. Click on the arrow at the end of Reports To: .

Choose the columns (fields) in your data file that contain the information that defines the organization.

Name: NAME\_LASTFIRST

Reports to: [Empty field with arrow at the end, highlighted by a red box]

22. Select Parent\_ID.

Choose the columns (fields) in your data file that contain the information that defines the organization.

Name: NAME\_LASTFIRST

Reports to: [Dropdown menu open]

First name: (optional) EXTERNAL\_ID, NAME\_LASTFIRST, JOB\_POSN, JOB\_DESC, POSN\_TYPE, PARENTID

Description: The Reports T

The Reports T

PARENTID (highlighted by a red box)

23. Click on Next.

Choose the columns (fields) in your data file that contain the information that define organization.

Name: NAME\_LASTFIRST

Reports to: PARENTID

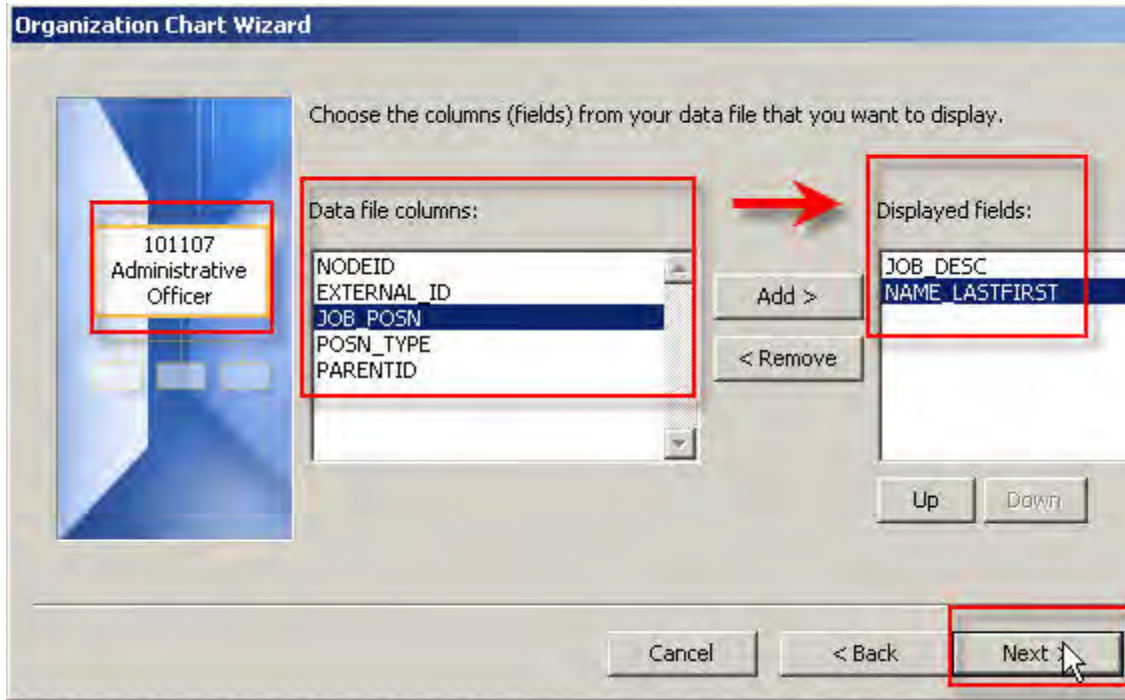
First name: (optional) <none>

Description: The First Name column (field) contains the person's first name. The data in this column combined with the data in the Name column to make the person's full name.

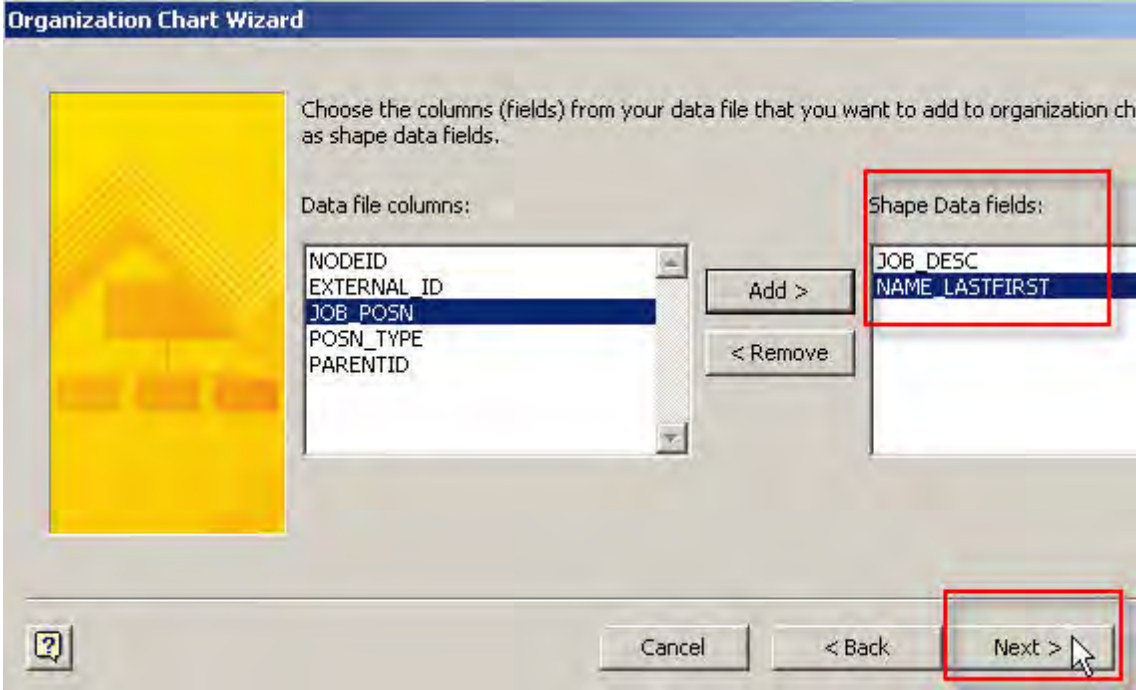
Cancel < Back Next >

24. Click on Job\_Desc (the position number is automatically associated to the position title) and click on Add.

25. Click on Name\_LastFirst, click on Add and click on Next.



26. Please ensure that the Job\_Desc and Name\_LastFirst are in the Shape Data Fields columns and click on Next.





27. Click on Finish so that Visio can create the org chart.

Your organization data may contain too many employees to fit on one page of your drawing. You can specify how much of your organization to display on each page or you can let the wizard define each page automatically.

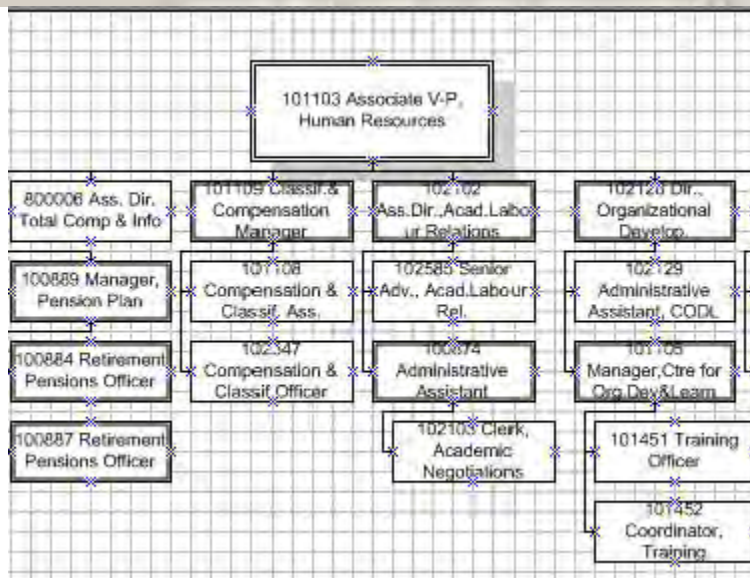
I want to specify how much of my organization to display on each page

I want the wizard to automatically break my organization chart across pages

Name at top of page:

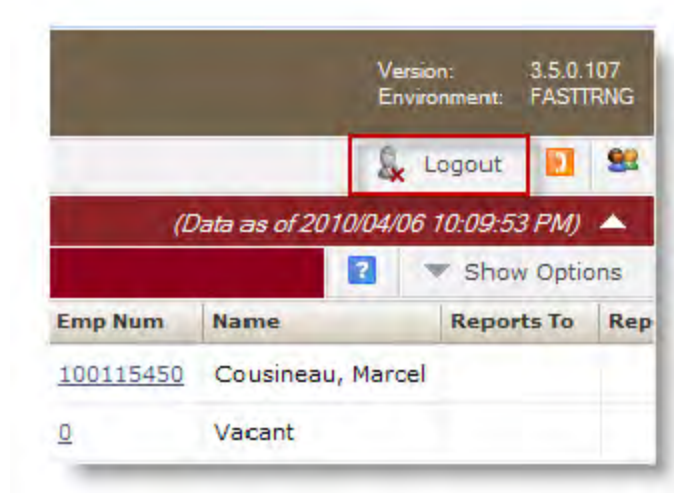
Hyperlink employee shapes across pages

Synchronize employee shapes across pages



## Quit FastHR

To exit FastHR, click on Logout.



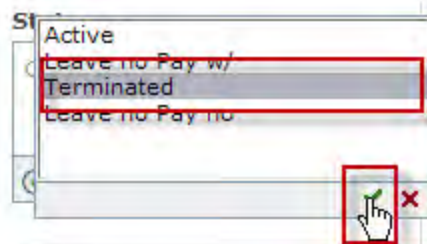
## Exercises of the Human Resources Reports and Data Interpretation course

### Exercise 1

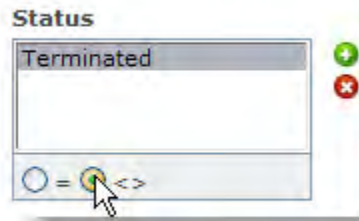
Goal of the exercise: 1 : To execute a report, change the number of rows appearing on the report and expand the grid region.

You would like to print a list of employees that might be retiring within the next 5 years, thus you need a list of employees that are 50 years old or more and that do not have a terminated status.

- 1) Select the Employee Summary report from the EMPLOYEES tab.
- 2) Select Terminated from the Status filter and click on the tick mark.



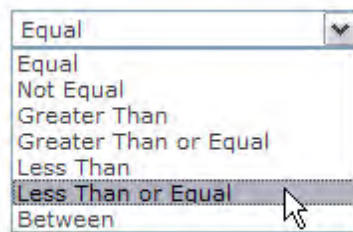
- 3) Click on the Exclude operator <> to exclude the terminated employees.



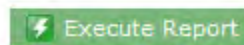
- 4) Find the BIRTH DATE filter and click on the calendar icon to find January 1st 1960.



- 5) Select the “Lesser than or equal” operator to select all employees born on or after January 1st 1960.



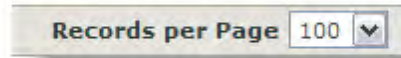
- 6) Click on execute Report.



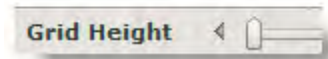
- 7) You would like to see more than 15 employees per page.



- 8) Click on the PAGE SIZE icon that can be found in the right lower part of the screen and select 500.



- 9) Click on the Grid Height icon and expand the grid region.



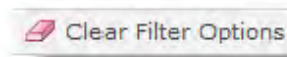
- 10) Click on the Export to Excel icon.



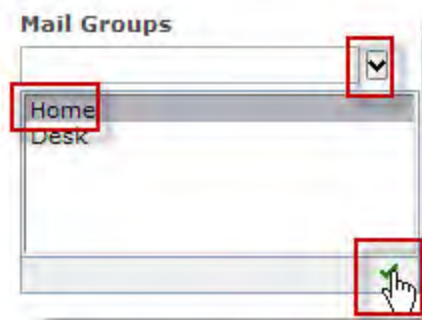
## Exercise 2

Goal of the exercise: execute a report using the available filters and modify the filters after running the report. You wish to send a letter to the home address of your employees therefore, you list containing their address.

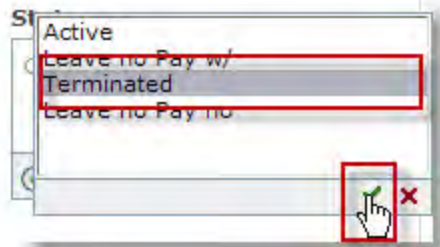
- 1) Select the Employee Mail List report of the Employees's tab.
- 2) Click on the Clear Filter icon to empty the filters.



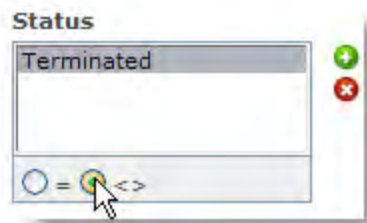
- 3) Click on the arrow at the end of Mail Groups.
- 4) Select Home and click on the tick mark.



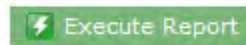
- 5) Find the Status filter.
- 6) Click on Terminated.



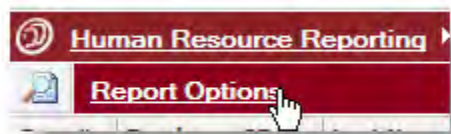
- 7) Click on the exclude operator <> to exclude the terminated employees.



- 8) Click on the Execute Report icon.

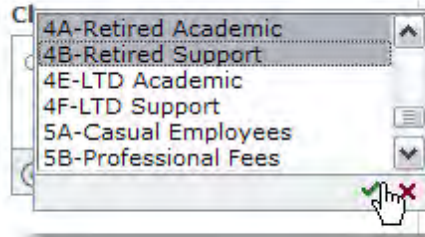


- 9) You need to eliminate the retired personnel.
- 10) Click on Report Options.

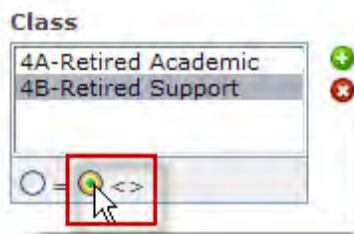


- 11) Find the CLASS filter.

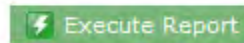
12) Select eclasses 4A and 4B.



13) Select the exclude operators to exclude retirees.



14) Click on the Execute Report icon.



### Exercise 3

Goal of the exercise: execute a report and unselect the columns that you do not want to see on the report. You will need a list of employees that have been hired after January 1st 2008.

- 1) Select the New Hires report of the Employees's tab.
- 2) Click on the Clear Filter icon to empty the filters.

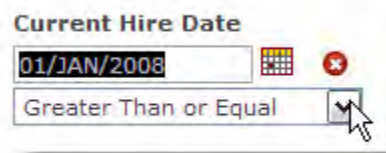


3) Find the Current Hire Date filter which is the continuous employment date.

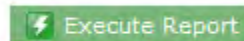
- 4) Type 2008/01/01 (january 1st 2008) or use the calendar icon.



- 5) Select the greater than or equal operator >= because you want all employees hired on or after January 1st 2008.



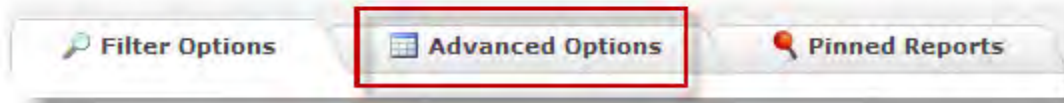
- 6) Click on the Execute Report icon.



- 7) You do not want the First Hire column in your report to prevent confusion with the Current Hire Date, you must then remove the First Hire column.
- 8) Click on Report Options.



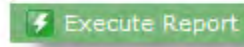
- 9) Click on the Advanced Options tab.



- 10) Remove the tick mark from the small beside the Original Hire variable.



- 11) Click on Execute Report.

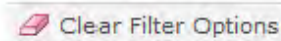


#### Exercise 4

Goal of the exercise 4: execute a report and find an employee number using the employee name.

You need to send a letter to Mr. Marcel Cousineau but you don't know his home address.

- 1) Select the Employee Details report of the Employees' tab.
- 2) Click on the Clear Filter icon to empty all filters.



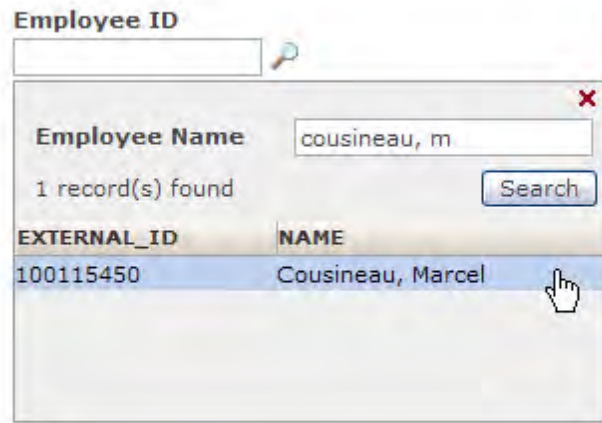
- 3) Click on the magnifying glass to find the employee number of Marcel Cousineau.



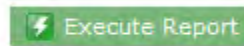
- 4) Type cousineau , m in the box and click on Search.



- 5) Click on the name of the employee.



- 6) Click on Execute Report.

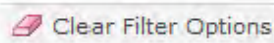


### Exercise 5

Goal of the exercise 5 : execute a report and modify the sort of the report output.

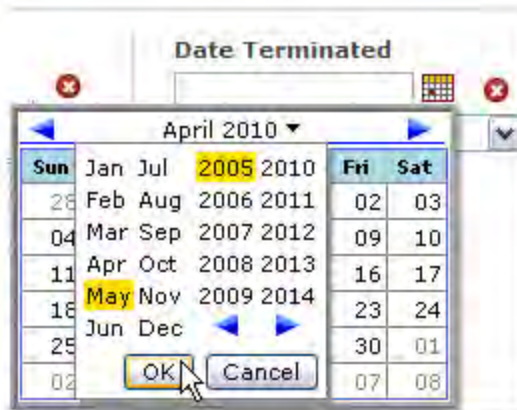
You need to have a list of terminated employee as of May 1st 2005.

- 1) Click on the Termination Listing report of the Employees' tab.
- 2) Click on the Clear Filter icon to empty the filters.

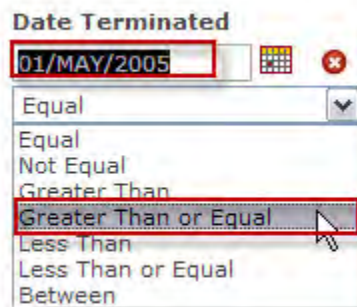


- 3) Click on the calendar icon of the Date Terminated filter.

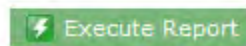
- 4) Select 2005 and May and then click on May 1st.



- 5) Select the Greater Than or Equal operator because you need all employees terminated on May 1st or after.

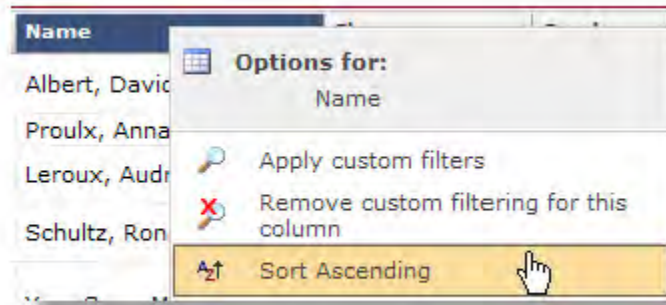


- 6) Click on Execute Report.



- 7) You want to sort the list alphabetically.

8) Click on the Name variable and select Sort Ascending.

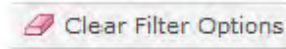


### Exercise 6

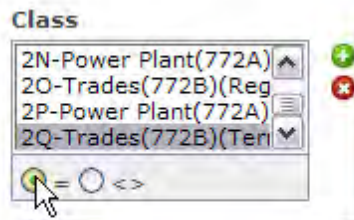
Goal of the exercise : execute a report and save the report options with the Save as pinned report and then execute the saved report.

You need a list of regular and term support staff with their number of years of service.

- 1) Select the Employee Anniversary of the Employees' tab.
- 2) Click on the Clear Filter icon to empty the filters.



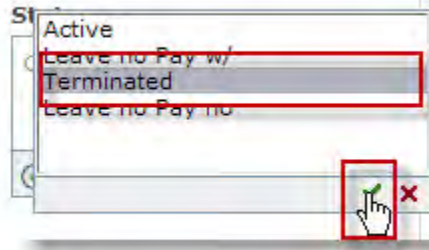
- 3) Find the CLASS filter.
- 4) Select all employees' classes beginning with 2. You want to exclude academics (classes beginning with 1), students (classes beginning with 3), retired and ltd staff (classes beginning with 4) , casual and non-paid employees (classes beginning with 5).



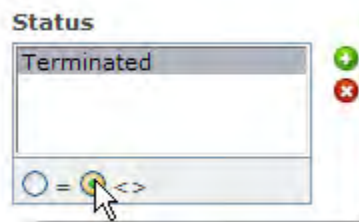
- 5) Select the = operator because you want all employees having eclasses equal to the selected values.



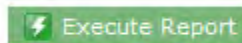
- 6) Select Terminated from the Status filter and click on the tick mark.



- 7) Click on the Exclude <> operator to remove terminated employees.





- 8) Click on Execute Report.



- 9) You would like to save the report options to be able to execute the report on a monthly basis.  
10) Click on the Save as Pinned Report icon.



- 11) In the box, type Years of service of support staff and click on the disquette to save the report.

<b>Report Name</b>	Année de service du personnel de	<input type="checkbox"/> <b>Make Report Public</b>	 
<b>Description</b>			

12) Click on Human Resources Reporting.



13) Click on the addition sign (+) beside My Pinned Reports.



14) Click on Execute Report to reexecute the report.

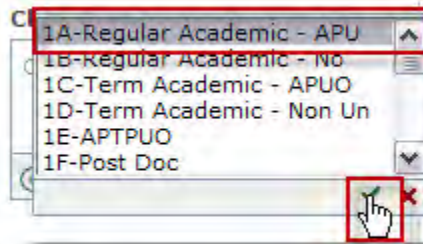


### Exercise 7

Goal of the exercise 8 : execute a report and filter data with the help of a custom filter.

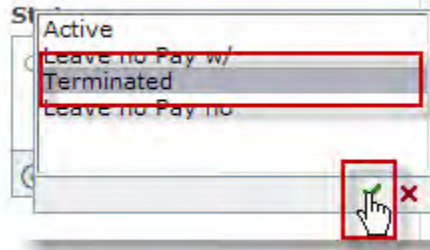
You need to send a personalized letter to your regular professors that are member of APUO and which the language of correspondence is English.

- 1) Select the Employee Summary report from the Employees's tab.
- 2) Find the CLASS filter and select the employee class 1A. You cannot execute a report without selecting at least one filter.

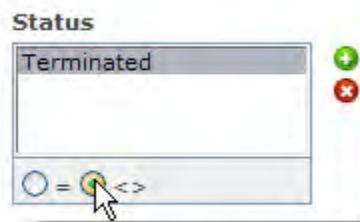


- 3) Select the equal operator because you need all employee that have an eclass equal to 1A.

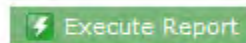
4) Select Terminated from the Status filter and click on the tick mark.



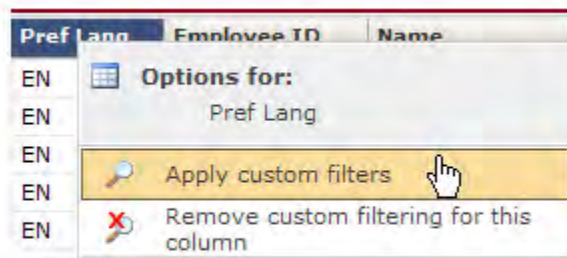
5) Click on the Exclude operator <> to remove the terminated employees.



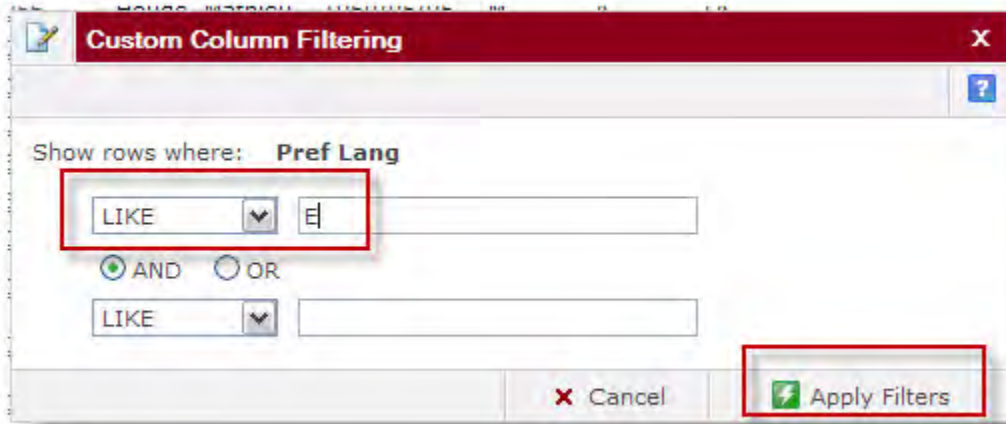
6) Click on Execute Report.



7) Click on the Pref Lang column and select Create Custom.



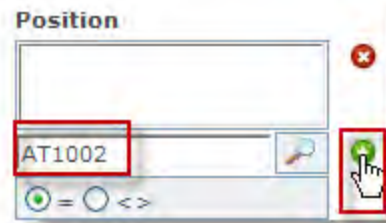
- 8) In the box, select the LIKE operator and type the E in capital letters (the system will look all values of the Pref Lang variable that begin with the letter E). Click on Apply Filter.



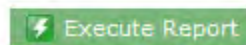
### Exercise 8

Goal of the exercise 8 : execute a report and enter data in the multiple selection filter. You would like to know what are the FOAPs of all employees associated to pooled position AT1002.

- 1) Select the Labour Codes from the Jobs tab.
- 2) Find the Position filter and type the position number AT1002 and hit ENTER.



- 3) Click on Execute Report.

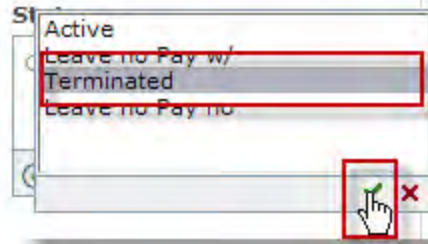


### Exercise 9

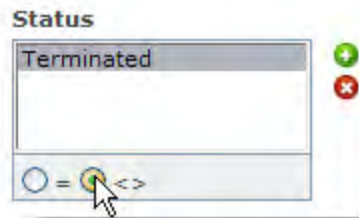
Goal of the exercise 9: execute a summary report.

You would like to have the number of employees per employee class. Select

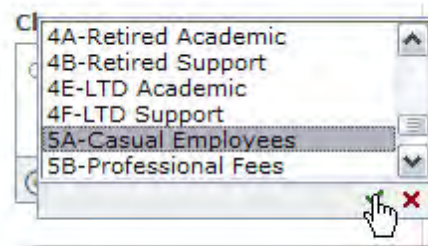
- 1) Employee Summary from the EMPLOYEES' tab.
- 2) Select Terminated from the Status filter and click on the tick mark.



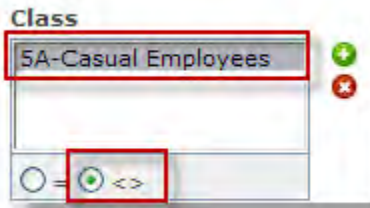
- 3) Click on Exclude operator <> to eliminate terminated employees.



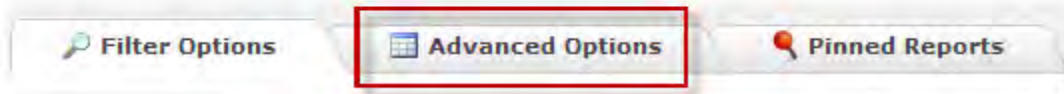
- 4) Find the CLASS filter and select employee class 5A (casuals employees are left active for at least 4 months even though we have not received a timesheet for the last four months and half therefore they must be eliminated from the report).



- 5) Select the Exclude operator<>.



- 6) Click on the Advanced Options tab.



- 7) Click on Select no Columns.  
8) Add a tick mark in the box beside Employee ID.  
9) Remove the tick mark in the box beside Email.  
10) In the column Group Function, select Count that is on the same line as Employee ID.  
11) Add a tick mark in the box beside Class.



12) In the column Sort, select Ascending (ASC) that is on the same line as Class.

Human Resource Reporting Employee Summary View employee summary information

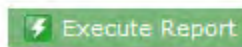
Report Options

Filter Options Advanced Options Pinned Reports

Display	Column Name	Group Function	Column Sort
<input type="checkbox"/>	Pref Lang		
<input checked="" type="checkbox"/>	Employee ID	Count	None
<input type="checkbox"/>	Name		
<input type="checkbox"/>	Birth Date		
<input type="checkbox"/>	Gender		
<input type="checkbox"/>	Emp Status		
<input type="checkbox"/>	Status		
<input checked="" type="checkbox"/>	Emp Class		Ascending (ASC)
<input type="checkbox"/>	Original Hire		
<input type="checkbox"/>	Current Hire		
<input type="checkbox"/>	Adj. Service		
<input type="checkbox"/>	Seniority		
<input type="checkbox"/>	Termination		
<input type="checkbox"/>	Home ORGN		
<input type="checkbox"/>	Dist ORGN		
<input type="checkbox"/>	Leave Code		
<input type="checkbox"/>	Marital Code		
<input type="checkbox"/>	Name Prefix		
<input type="checkbox"/>	Name Suffix		
<input type="checkbox"/>	Email		

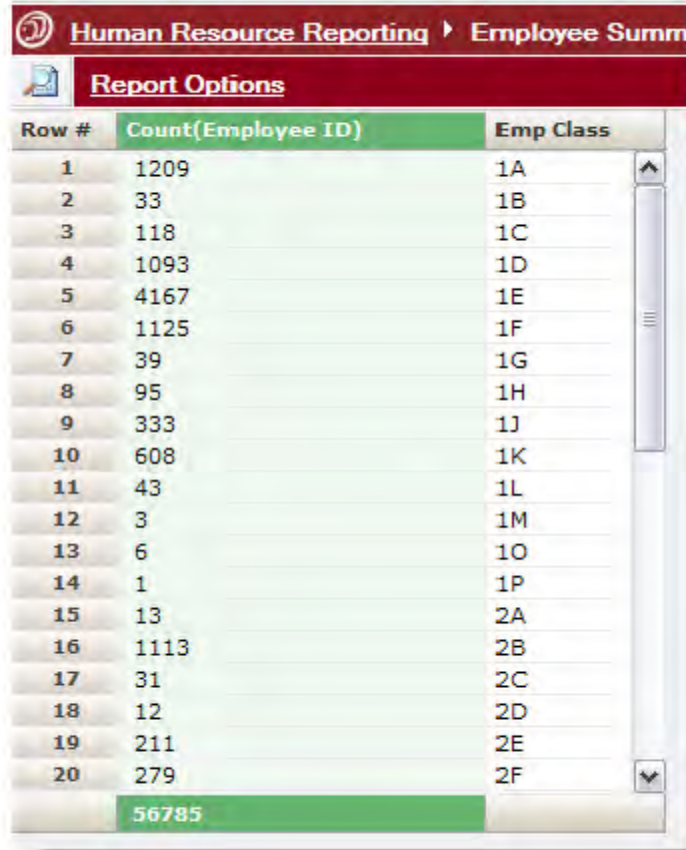
Select All Columns Select No Columns

13) Click on Execute Report.





14) You should obtain a result as illustrated below.



The screenshot shows a software window titled "Human Resource Reporting" with a sub-tab "Employee Summary". Below the title bar is a "Report Options" section. The main content is a table with three columns: "Row #", "Count(Employee ID)", and "Emp Class". The table lists 20 rows of data, with a total count of 56785 shown in a green bar at the bottom. The "Emp Class" column lists classes from 1A to 2F. A vertical scrollbar is visible on the right side of the table.

Row #	Count(Employee ID)	Emp Class
1	1209	1A
2	33	1B
3	118	1C
4	1093	1D
5	4167	1E
6	1125	1F
7	39	1G
8	95	1H
9	333	1J
10	608	1K
11	43	1L
12	3	1M
13	6	1O
14	1	1P
15	13	2A
16	1113	2B
17	31	2C
18	12	2D
19	211	2E
20	279	2F
56785		

15) Click on Export to Excel.

