ComVida Corporation

EMS Human Resources User Manual

September 2013

TABLE OF CONTENTS

1 INTRODUCTION

Welcome to the ComVida Corporation EMS Human Resources User Manual. This manual has been developed to assist you, a user of EMS, in using the system to its full potential.

This document is designed as a reference guide to the Human Resources application. It explains the "reason for" and "use of" each page, tool and report. User manuals for the others areas of EMS are also available in the EMS Help menu, along with a link to the Help that covers procedures, tips and techniques for all areas of the system.

We have made every effort to ensure that the information provided in this manual is correct. We hope that you find it a useful tool. Should you have any comments about this manual, please direct them to

Client Services
ComVida Corporation
#201 – 319 Governors Court
New Westminster, BC V3L 5S5

Or contact us through our website

www.comvida.com

Based on user feedback this manual will continue to evolve, so from time to time, please check the Help menu for an updated copy.

2 HUMAN RESOURCES

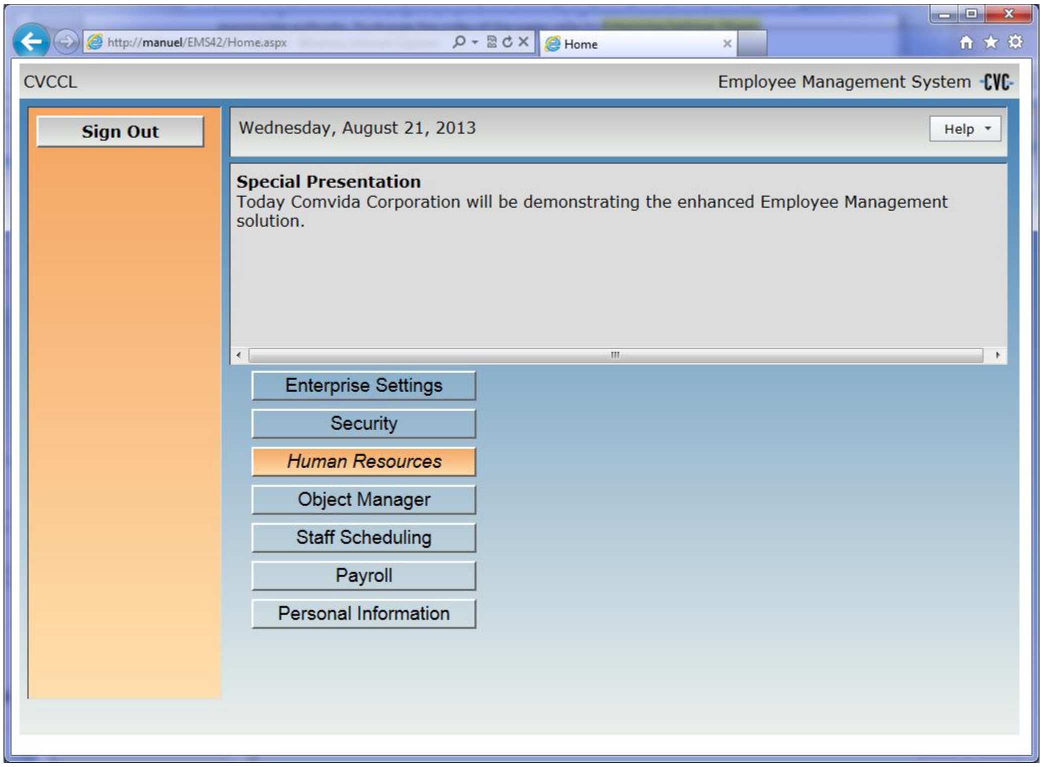
Human Resources allows for the complete tracking of unlimited employee information. Basic information is captured on the pre-configured pages described in the following pages, while the user-defined pages can be setup to meet your organization's specific requirements based on Collective Agreements, Government Employment Standards, and Employment Policies.

With multiple fields types available and an unlimited number of fields per page, historical, current and future-dated information pertaining to a particular HR topic can be tracked and, for each employee, displayed on one screen.

Human Resources also supports import and export of virtually every field in the system, along with several pre-built reports and user-defined page reports. And since the data is stored dynamically, custom reports are also available to meet each organization's specific reporting requirements. Contact your account manager for more information or to request a quote.

2.1 Logging In

To access Human Resources, select Human Resources from the main EMS menu. Human Resources will open in a new window with a list of pages on the left, along with Page Notes. By default the **Master** page will be the first page displayed, however the page order can be modified with the appropriate authority. To change the order of the pages refer to Enterprise Settings |Pages.

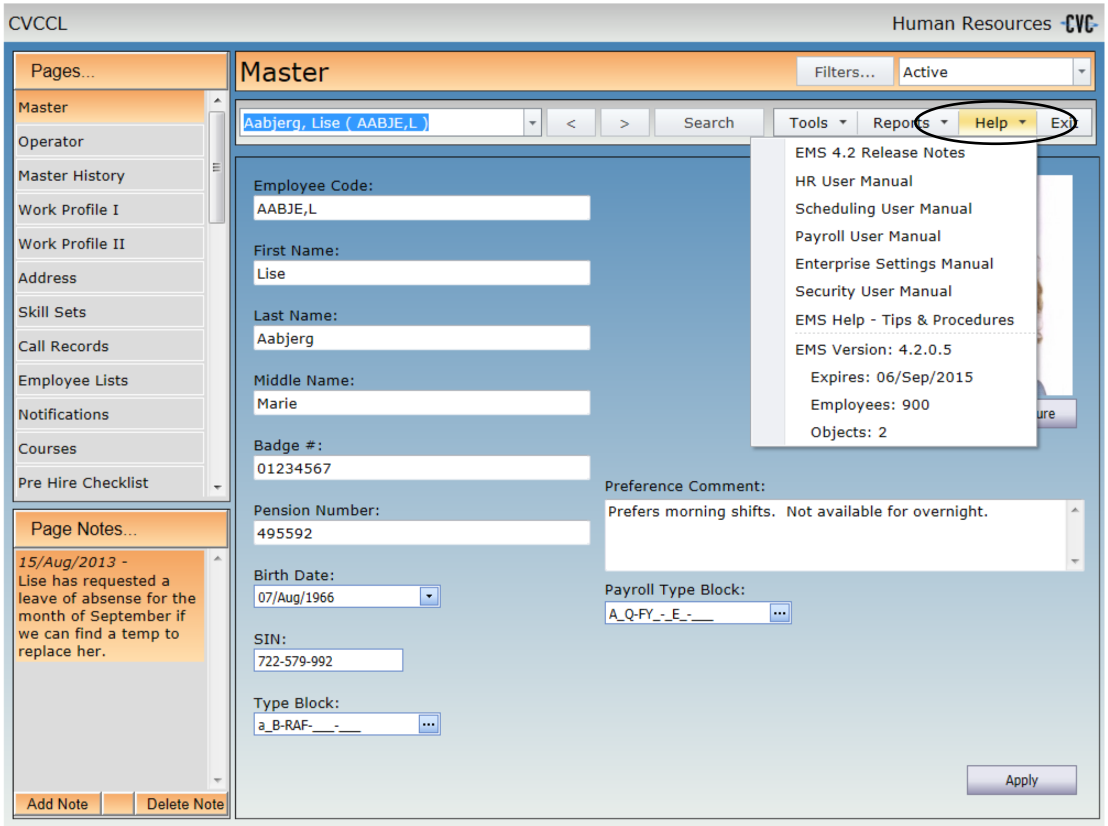


2.2 Accessing Help

The Help menu contains a link to this user manual as well as manuals for Scheduling, Payroll, Enterprise Settings, Personal Information, and Security. These documents can be viewed online or can be printed for your reference.

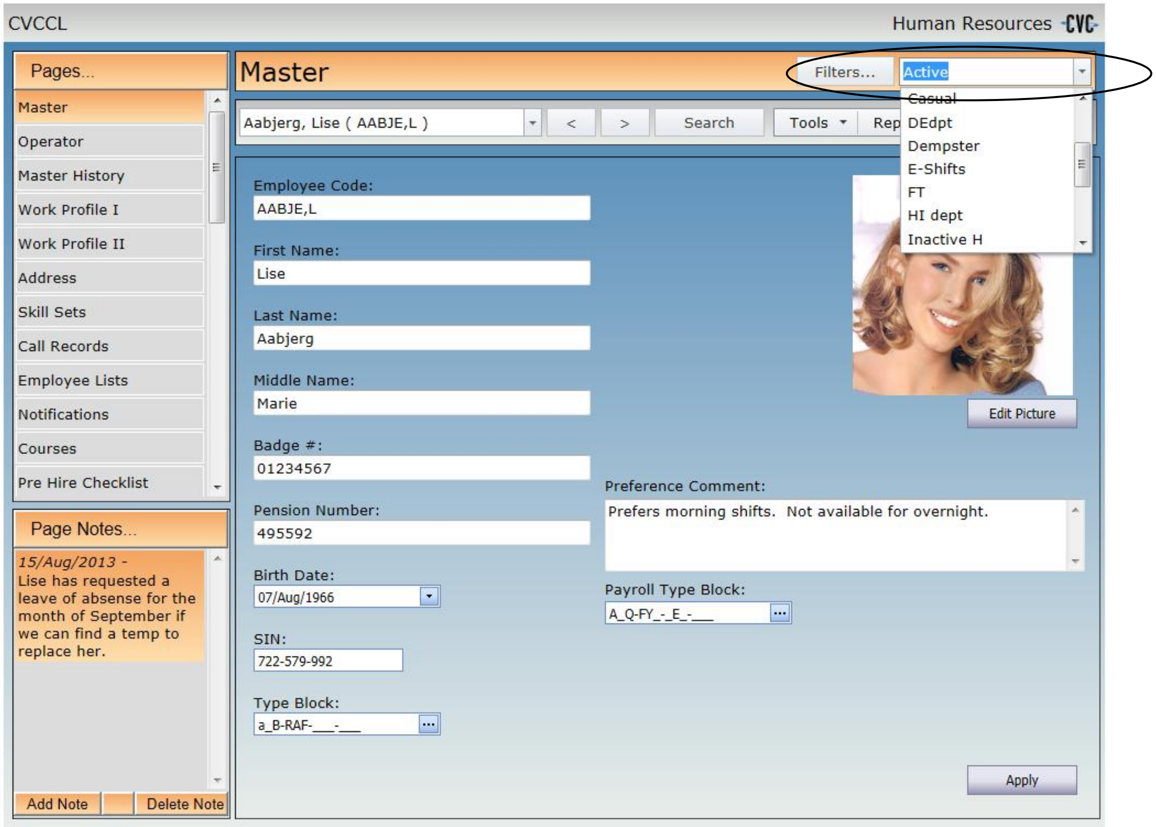
In addition to the user manuals, there is also a link to an on-line Help system that covers common procedures in EMS as well as tips and techniques to enhance the system's usability.

The Help menu also contains licensing information such as the EMS Version, License expiry date, Number of licensed Employees and the Number of Objects.



2.3 Employee Filters

Filters in HR allow users to create their own (or shared) groups of employees. To apply an existing filter to limit the employees displayed on the HR pages, click the dropdown box next to the Filters... button.



Clicking the Filters button at the top of any page will display a Filters dialog where users can create and maintain an unlimited number of Filters for use throughout EMS. Refer to the Type Block Concepts section of the Enterprise Settings manual for more information on Filters.

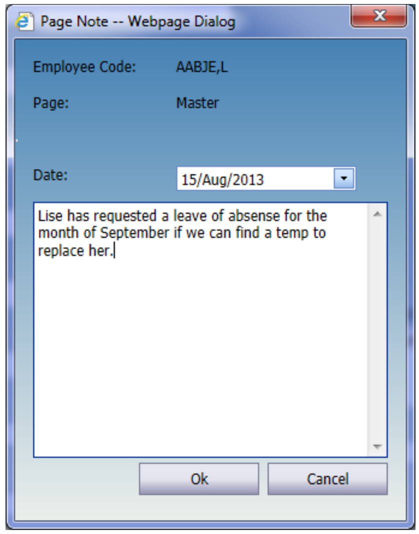
2.4 Page Notes

The section below the HR page list on the left displays page-related notes for each employee. Notes can be added and deleted directly from the page.

To add a note, click the **Add Note** button.

To edit a note, double click the note and the edit window will open.

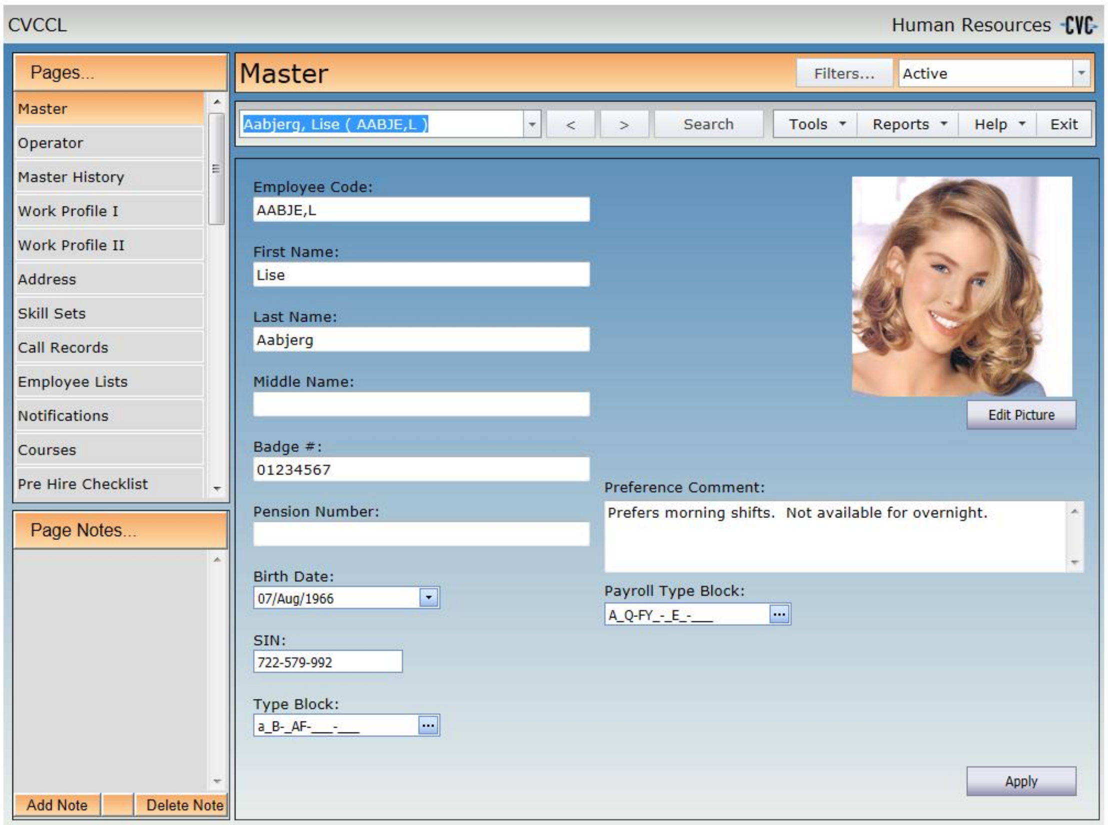
To delete a note, select the note and click the **Delete Note** button. You will be prompted for confirmation.


Page Note -- Webpage Dialog
Employee Code:
AABJE,L
Page:
Master
Date:
15/Aug/2013
Lise has requested a leave of absense for the month of September if we can find a temp to replace her.
Ok
Cancel

3 PRE-CONFIGURED PAGES

3.1 Master

The Master page contains basic information about an employee that normally does not change, e.g. name, date of birth and social insurance number.



The field labels (names) on this page can be changed in Enterprise Settings | Fields, however use caution when changing the label as most of these fields are used in other areas of EMS.

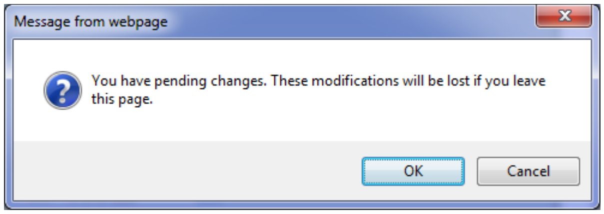
To modify any information, click the field to be changed.

Field Name	Description/Usage
Employee Code	A unique alpha-numeric code (max length: 10 characters) that identifies an employee. The employee code is used through-out EMS.
First Name	The employee's first name (max length: 25 characters). The Display name used in the dropdown lists, reports, etc. is built automatically using the

	First Name, Last Name.
Last Name	The employee's last name(max length: 25 characters). The Display name used in the dropdown lists, reports, etc. is built automatically using the First Name, Last Name.
Middle Name	The employee's middle name. The middle name is for informational purposes only.
Badge #	An optional time clock card or badge number (max length: 20 characters). If using the time clock import tool in Scheduling, the badge # must be an exact match to the badge code specified in the import file from the time clock.
Pension Number	An optional pension plan number (max length: 12 characters). If specified, this is the number that will be printed in Box 50 of the T4 slip in Payroll.
Birth Date	The employee's date of birth.
SIN	The employee's social insurance number. This must be a valid number, the CRA check-sum calculation will be applied to the SIN and if it does not pass, an error message will be displayed.
Type Block	The employee's EMS type block - a set of twelve characters used to identify and group employees. The first seven characters are automatically maintained by the system and the remaining five can be customized to each site's specific structure and requirements.
Preference Comment	A free-form note field (max length: 255 characters) that can be used to store an employee's work preferences. The preference comment is displayed in the tool tip of the Block Booking and Shifts to be filled pages in Staff Scheduling.
Payroll Type Block	The employee's Payroll type block - a customizable set of twelve characters used to identify and group employees within Payroll.

When completed, click **Apply.**

If you move away from the page without clicking Apply, the following message will appear:



Click OK to leave the page and discard your changes. Click Cancel to return to the page and then click Apply to save your changes.

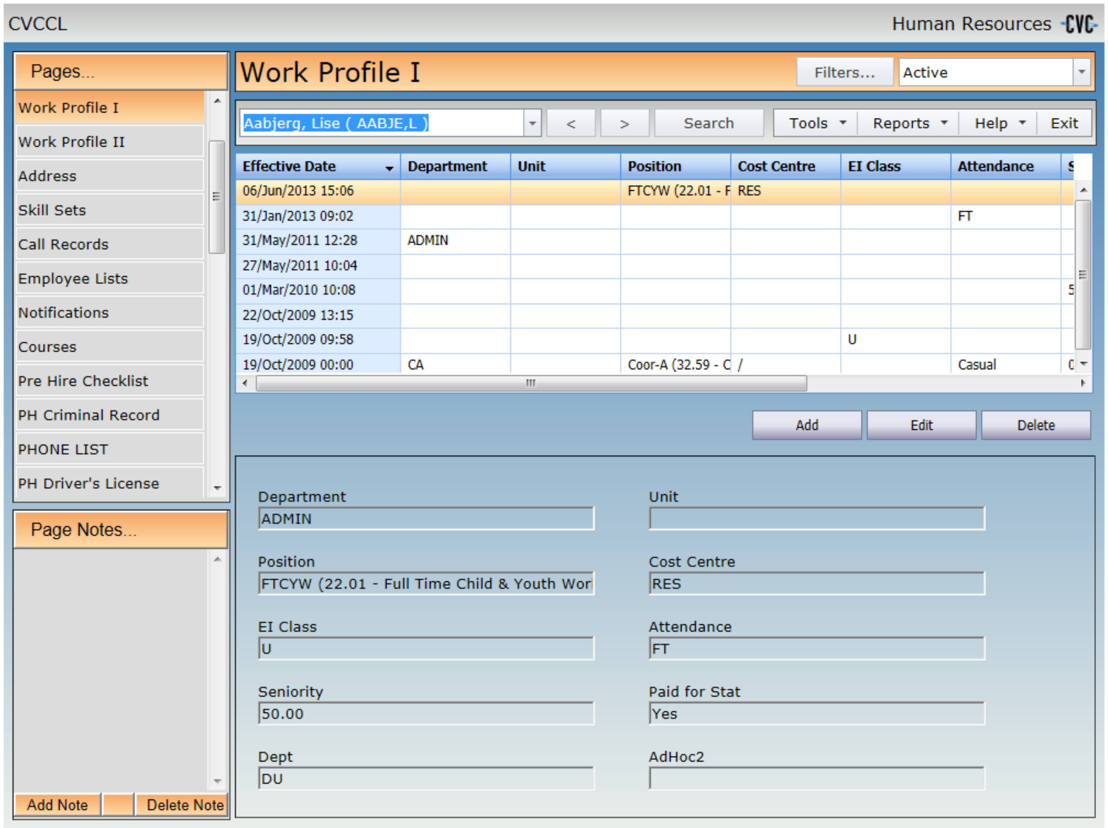
Employee Profiles Report

A detailed report of employee master information can be printed through Reports | Profiles.

3.2 Work Profile I

The Work Profile I page contains the employee's default or home settings for scheduling and payroll purposes.   It stores the history as well as current values and pending (unprocessed) changes.

Note that changes to an employee's department, unit, position, cost centre and EI class are *only applied to new assignments in Scheduling and new amounts in Payroll*. To apply the changes to existing assignments and/or amounts, refer to **Multiple Changes** tool in the Scheduling manual and the **Apply HR Changes** tool in the Payroll manual.



Field Name	Description/Usage
Department	The employee's home department. An employee may work in several departments, but this is their default department for assignment generation in Scheduling and amounts configuration in Payroll. The Department is a required field. The Department's type block character is automatically stored in the first position of the employee's type block.
Unit	The employee's home unit. An employee may work in several units, but this is their default unit for assignment generation in Scheduling and amounts configuration in Payroll. The Unit is *not* a required field. The Unit's type block character is automatically stored in the second position of the employee's type block.

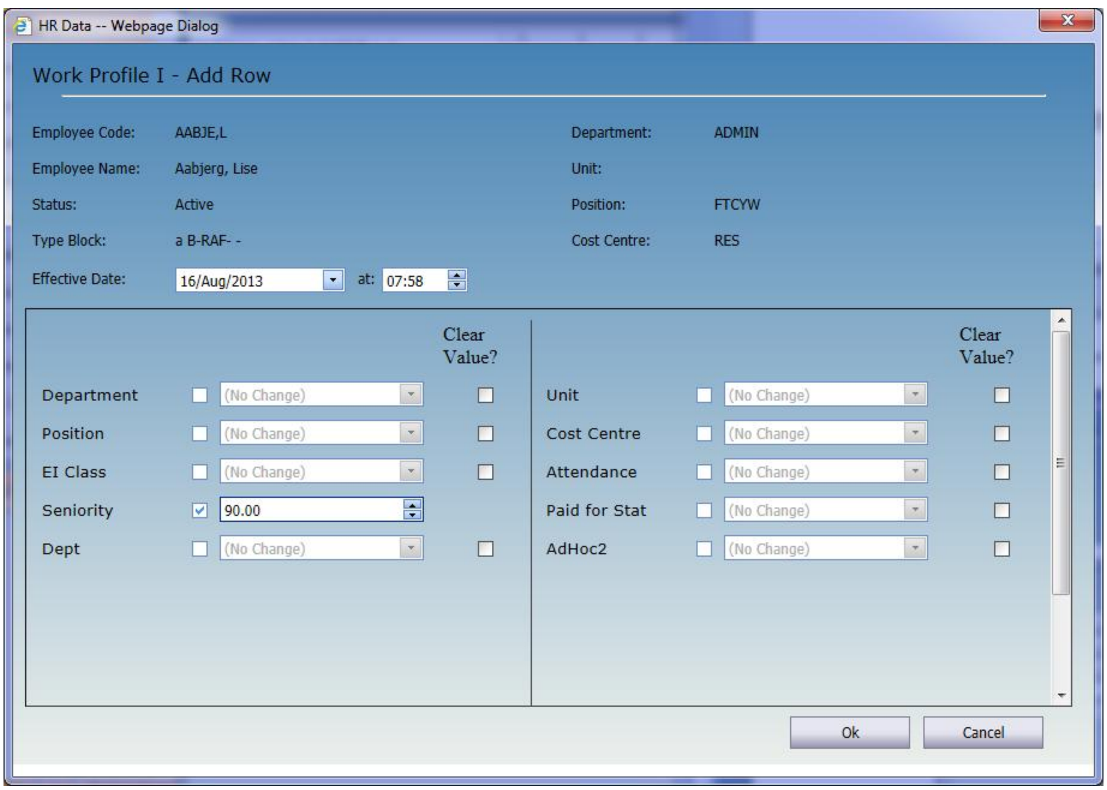
Position	The employee's home position. An employee may work several positions, but this is their default position for assignment generation in Scheduling and amounts configuration in Payroll. The Position is a required field. Setting **ShowPositionDetailsinHR** to True/Yes in Enterprise Settings | Company Settings will also display the Position's rate and description for users who *also have view or better access to the position table*. The Position's type block character is automatically stored in the third position of the employee's type block.
Cost Centre	The employee's home Cost Centre. An employee may work in several cost centres, but this is their default cost centre for assignment generation in Scheduling and amounts configuration in Payroll. The Cost Centre is a required field. The Cost Centre's type block character is automatically stored in the fourth position of the employee's type block.
EI Class	The employee's default EI class. Employers that qualify for a reduced rate of EI will use the employee's EI Class to distinguish their earnings. The EI Class is *not* a required field. The EI Class's type block character is automatically stored in the seventh position of the employee's type block.
Attendance	The employee's attendance type, usually indicating full-time, part-time, casual, etc. Attendance types are maintained in Enterprise Settings | Look-up Codes. The Attendance type block character is automatically stored in the sixth position of the employee's type block.
Seniority	The employee's seniority hours. Seniority hours can be imported from payroll or entered manually on a regular basis. Seniority is one of the default sort fields on the Shifts to be Filled page as well as the Block booking page in Scheduling. It is also available as an optional sort on several Scheduling reports.

Paid for Stat	Flag indicating that the employee qualifies for pay on statutory holidays. Setting Paid for Stat to Yes will include the employee in the Stat Not Worked calculation in Scheduling.
AdHoc1	A user-defined text field. The AdHoc1 label and description are set up in Enterprise Settings | Fields. The AdHoc1 field is displayed on the Shifts to be Filled page.
AdHoc2	A user-defined text field. The AdHoc2 label and description are set up in Enterprise Settings | Fields. The AdHoc2 field is displayed on the Shifts to be Filled page.

Maintaining Data

The Work Profile I page is a "Carry-forward" type page, so any values that are not updated will continue to be the employee's current values.

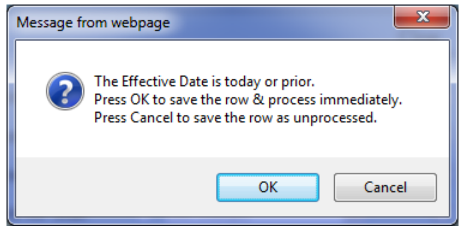
To change any information on this page, click the **Add** button.



To edit the contents of a field, check the box between the label (name) and the field. Leaving the checkbox unchecked or a list field set to **(No Change)** will leave the data for that field unchanged.

To clear a list or date value, check the box in the Clear Value column.

Click OK. If the Effective Date is the current date or earlier, you will be asked if you wish to process the change immediately:



If you select **Cancel**, the row will be saved as unprocessed, i.e. the changes will not be applied to the employee's current values until Tools | Process HR Data is run. Unprocessed rows will appear italic.

Select **OK** to apply the changes immediately.

To modify the values on an existing row, select the row to be modified and click the **Edit** button.

To delete a row, select the row to be deleted and click the **Delete** button.

Page Notes

The bottom left of the page contains a Page Notes field like the one in the HR Master page.

Employee Profiles Report

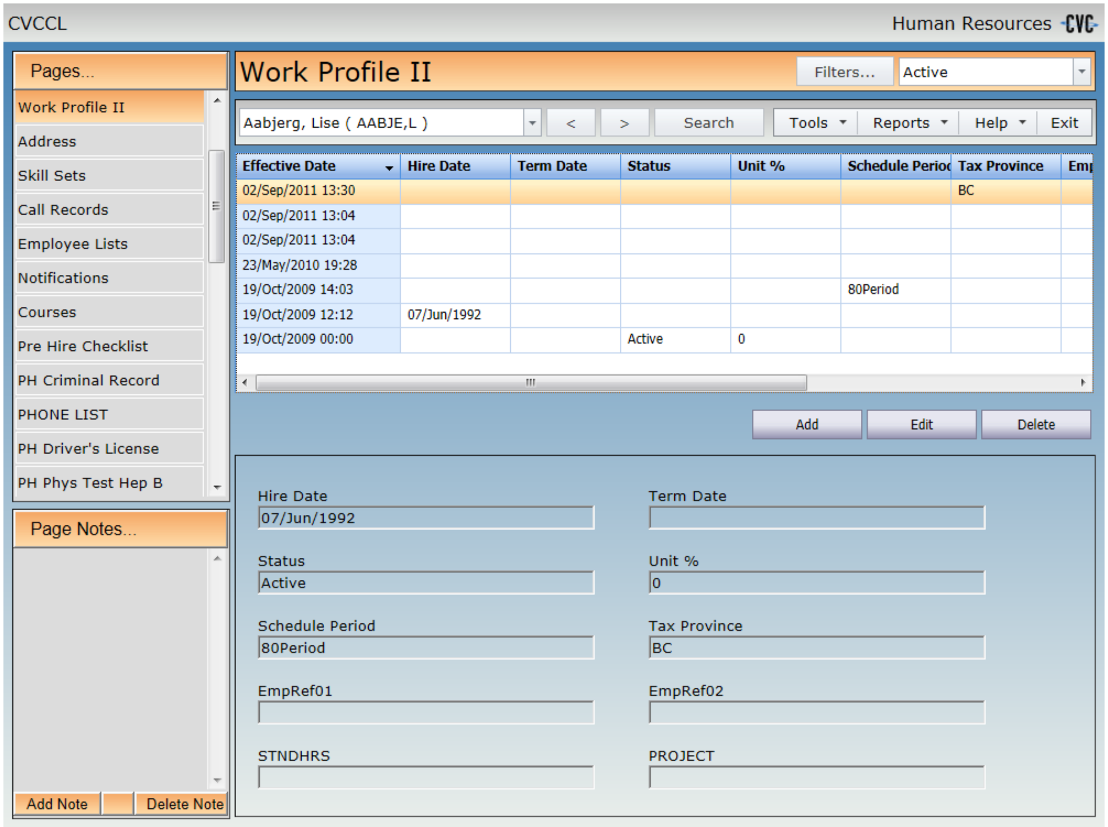
A detailed report of employee work profile information can be printed through Reports | Profiles.

User Defined Pages Report

The User Defined Pages report can be used to print a list of selected fields from any page in HR, including the Work Profile I. It is available through Reports | User Defined.

3.3 Work Profile II

The Work Profile II page contains additional information about the employee's employment with the organization. Like the Work Profile I page, this is a "Carry-forward" that stores the history as well as current values and pending (unprocessed) changes.



Field Name	Description/Usage
Hire Date	The first day the employee worked.
Term Date	The last day the employee worked. If an employee is re-hired, clear this value and update the Hire Date to the new start date.
Status	The employee's current work status. The work status list is pre-set with Active, Inactive and Terminated. An employee may be Inactive when they're away on a leave of absence, for example. The first letter of each work status is automatically stored in the fifth position of the employee's type block.
Unit %	The employee's unit producing percent (valid values: 0 - 100). The Unit % is used in conjunction with the Dept, Unit, Position and Cost

	Centre unit-producing percent to break-down MOS (Management Operations) and UPP (Unit Producing) in the Payroll Report Writer.
Schedule Period	The employee's default schedule period for Overtime calculations in Scheduling. Normally the Schedule Period is set at the Department level. However, employees with unique overtime rules may have a Schedule Period assigned to them that overrides the Department's Schedule Period. Schedule Periods are maintained in Enterprise Settings | Schedule Periods.
Tax Province	The employee's province for payroll tax calculations. Normally the Tax Province is specified for all employees in Payroll Settings. However employees that are paid under a different province may have a Tax Province assigned directly to them.
EmpRef1	A user-defined field that can be configured to meet an organization's requirements. The EmpRef1 label and type are set up in Enterprise Settings | Fields.
EmpRef2	A user-defined field that can be configured to meet an organization's requirements. The EmpRef2 label and type are set up in Enterprise Settings | Fields.
EmpRef3	A user-defined field that can be configured to meet an organization's requirements. The EmpRef3 label and type are set up in Enterprise Settings | Fields.
EmpRef4	A user-defined field that can be configured to meet an organization's requirements. The EmpRef4 label and type are set up in Enterprise Settings | Fields.

Maintaining Data

As described above, the Work Profile II page is a "Carry-forward" type page, so any values that are not updated will continue to be the employee's current values. The information is maintained in the same manner as the Work Profile I page.

Page Notes

The bottom left of the page contains a Page Notes field like the one in the HR Master page.

Employee Profiles Report

A detailed report of employee work profile information can be printed through Reports | Profiles.

User Defined Pages Report

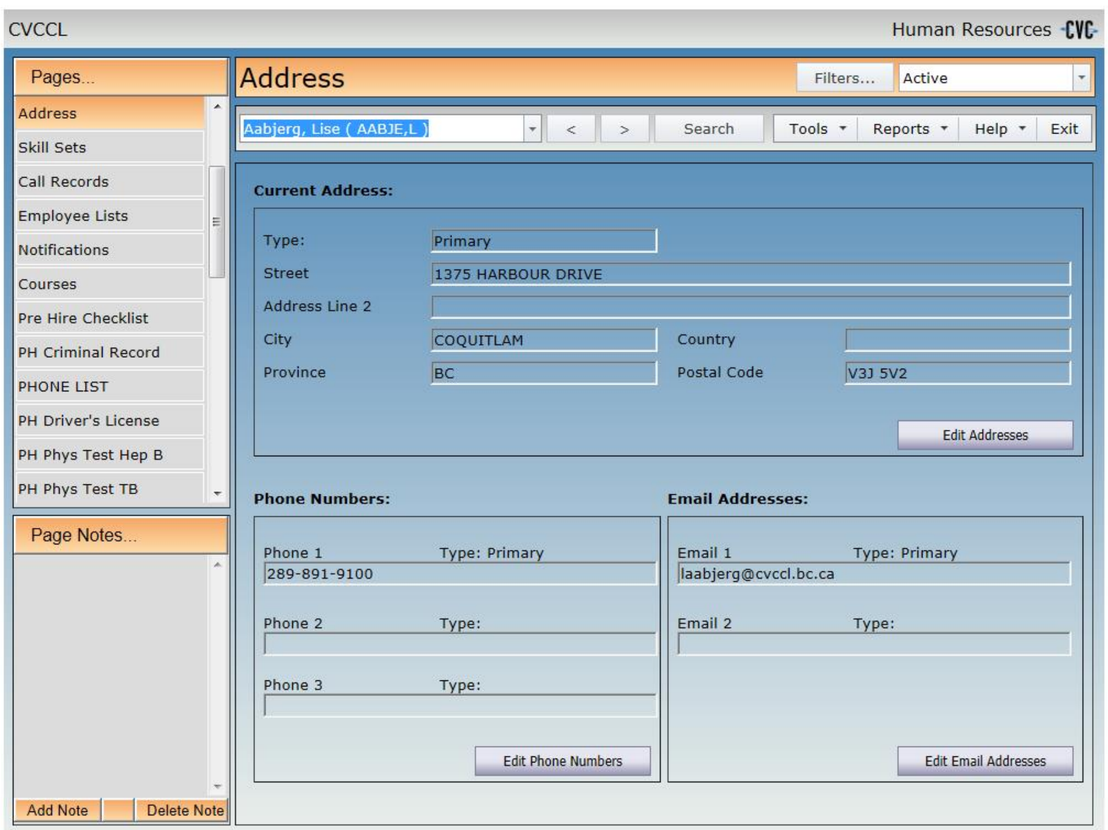
The User Defined Pages report can be used to print a list of selected fields from any page in HR, including the Work Profile II. It is available through Reports | User Defined.

3.4 Address

The Address page in HR is made up of four sections: **Current Address**, **Phone Numbers**, **Email Addresses** and **Page Notes**.

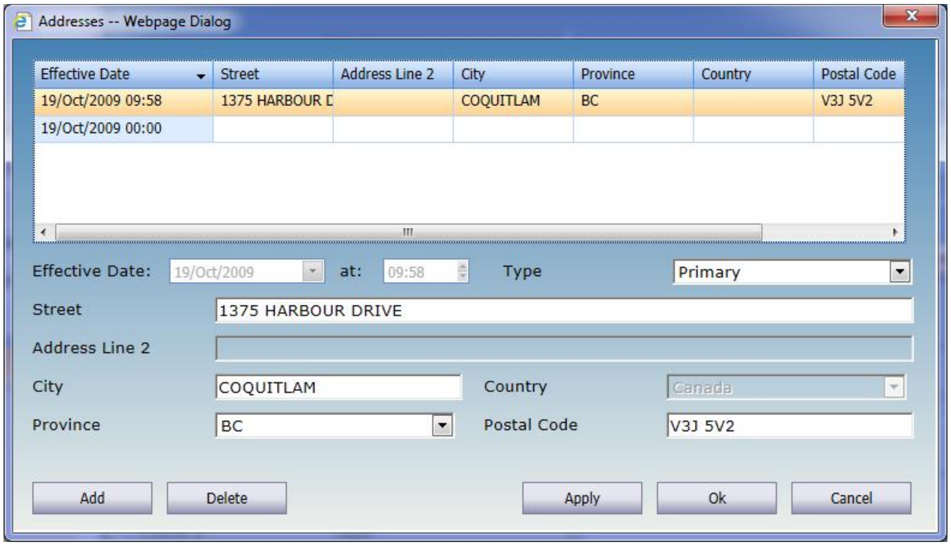
The Address page is a "Current Values" type page, so it displays the employee's current contact information. Historical values can be viewed on the Edit dialog for each section.

The Contact Type list is maintained in Enterprise Settings | Lookups and can be customized to suit each organization's requirements.



Current Address

Click the **Edit Addresses** button to change an address.



To add a new address, click the **Add** button and enter the appropriate information.

To modify the current address, update the appropriate fields and click the **Apply** button to leave the edit dialog open or click **OK** to save the changes and close the dialog. Hint: fields that were not entered when the address was originally created may be disabled. To enable those fields for modification, click the **Add** button instead.

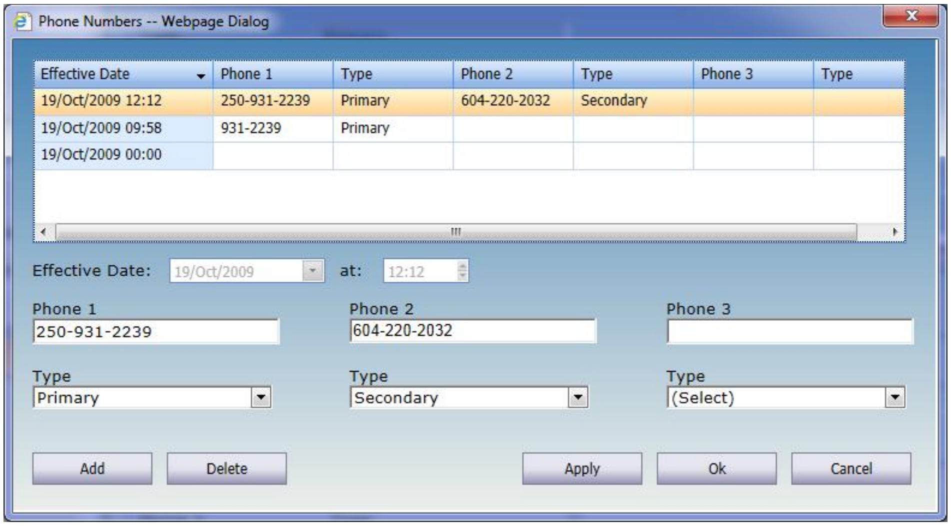
To delete an address, click the **Delete** button.

To save your changes before closing, click the **Apply** button.

To save a future-dated address change, set the Effective Date to the actual date the new address becomes active. The new address will be saved as unprocessed, i.e. the changes will not be applied to the employee's current address until Tools | Process HR Data is run. Unprocessed rows will appear italic.

Phone Numbers

Click the **Edit Phone Numbers** button to change or add a phone number.



To add a new phone number, click the **Add** button and enter the appropriate information.

To modify the current phone number(s), update the appropriate fields and click the **Apply** button to leave the edit dialog open or click **OK** to save the changes and close the dialog. Hint: fields that were not entered when the phone number was originally entered may be disabled. To enable those fields for modification, click the **Add** button instead.

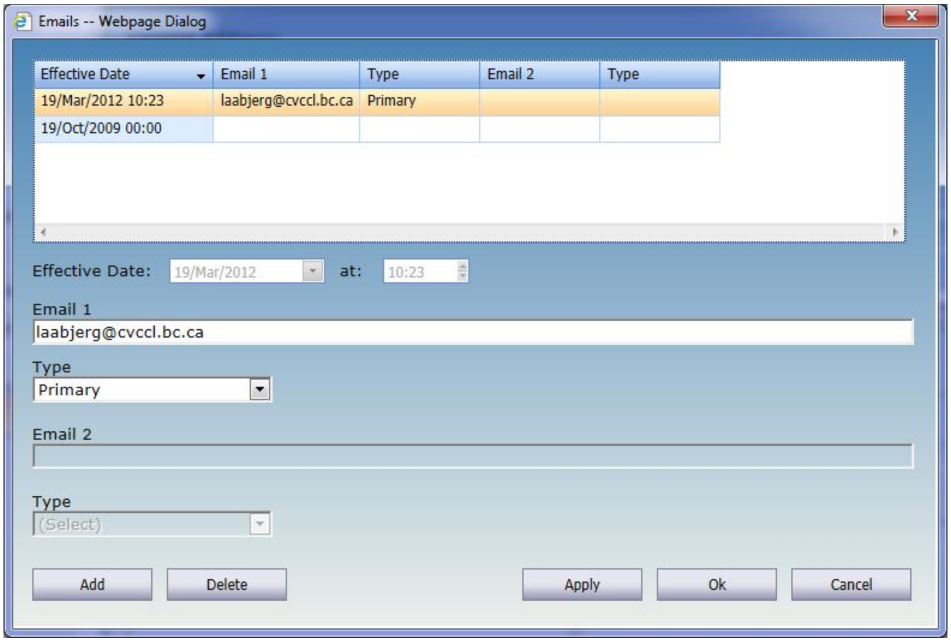
To delete an phone number, click the **Delete** button.

To save your changes before closing, click the **Apply** button.

To save a future-dated phone number change, set the Effective Date to the actual date the new phone number becomes active. The new phone number will be saved as unprocessed, i.e. the changes will not be applied to the employee's current phone number until Tools | Process HR Data is run. Unprocessed rows will appear italic.

Email Addresses

Click the **Edit Email Addresses** button to change an email address. Email addresses can be a maximum length of 254 characters.



To add a new email address, click the **Add** button and enter the appropriate information.

To modify the current email addresses(s), update the appropriate fields and click the **Apply** button to leave the edit dialog open or click **OK** to save the changes and close the dialog. Hint: fields that were not entered when the email address was originally entered may be disabled. To enable those fields for modification, click the **Add** button instead.

To delete an email address, click the **Delete** button.

To save your changes before closing, click the **Apply** button.

To save a future-dated email address change, set the Effective Date to the actual date the new email address becomes active. The new email address will be saved as unprocessed, i.e. the changes will not be applied to the employee's current email address until Tools | Process HR Data is run. Unprocessed rows will appear italic.

Page Notes

The bottom left of the page contains a Page Notes field like the one in the HR Master page.

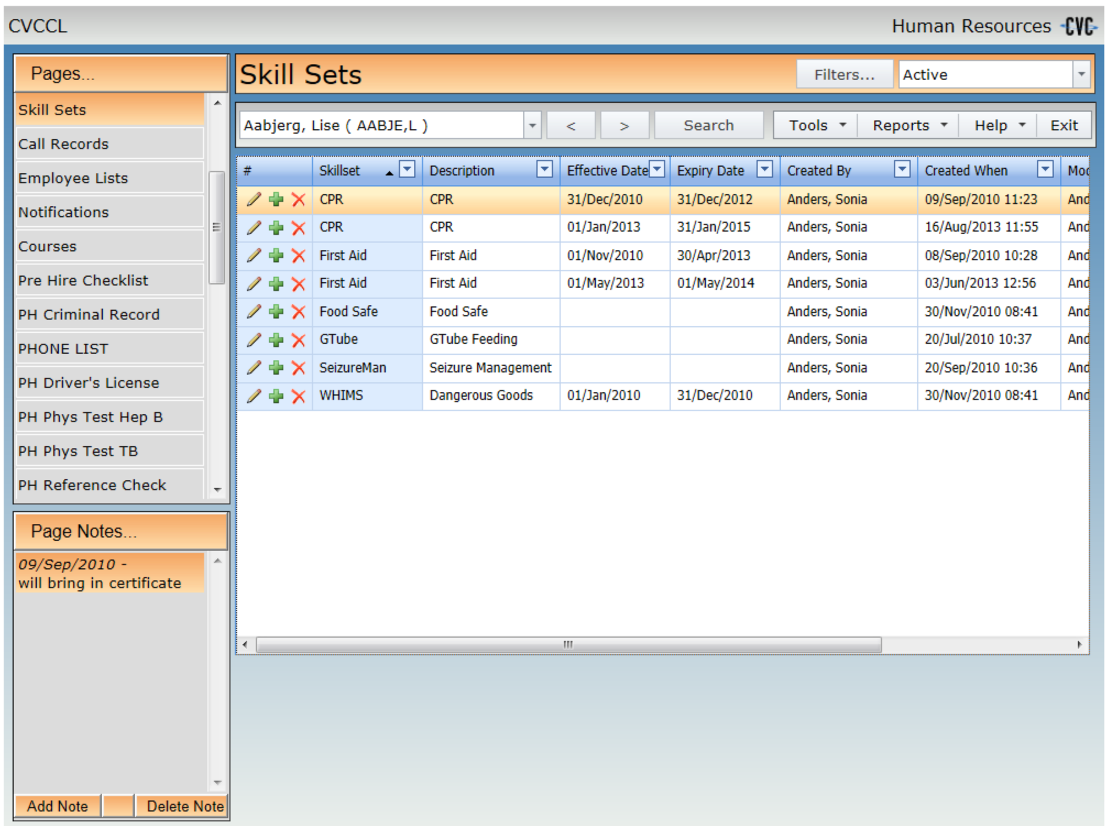
Contacts Report

A list of current employee addresses, phone numbers and email addresses can be printed through Reports | Contacts.

3.5 Skill Sets

The Skill Sets page in HR is a list of skills possessed by the employee with optional effective and expiry dates for tracking qualifications.

The Shifts to be Filled page in Scheduling displays each employee's active (unexpired) skill sets along with their effective and expiry dates (if set) in a tool tip. Shifts with skill sets will be checked against each employee's skill sets and an employee with all required skill sets will also be flagged as qualified to work the shift.



Field Name	Description/Usage
Skill Set	An employee's skill. Skill sets are maintained in Enterprise Settings | Skill Sets.
Description	A description of the skill. This field is read only.
Effective Date	The effective date of the skill. If there is no effective date, click the Clear button in the date dropdown calendar to leave it blank.

Expiry Date	The expiration date of the skill. If the skill does not expire, click the Clear button in the date dropdown calendar to leave it blank.

To add a new skill set click the green plus sign ( ).

To edit an existing skill set click the brown pencil ( ).

To delete a skill set click the red X ( ).

Page Notes

The bottom left of the page contains a Page Notes field like the one in the HR Master page.

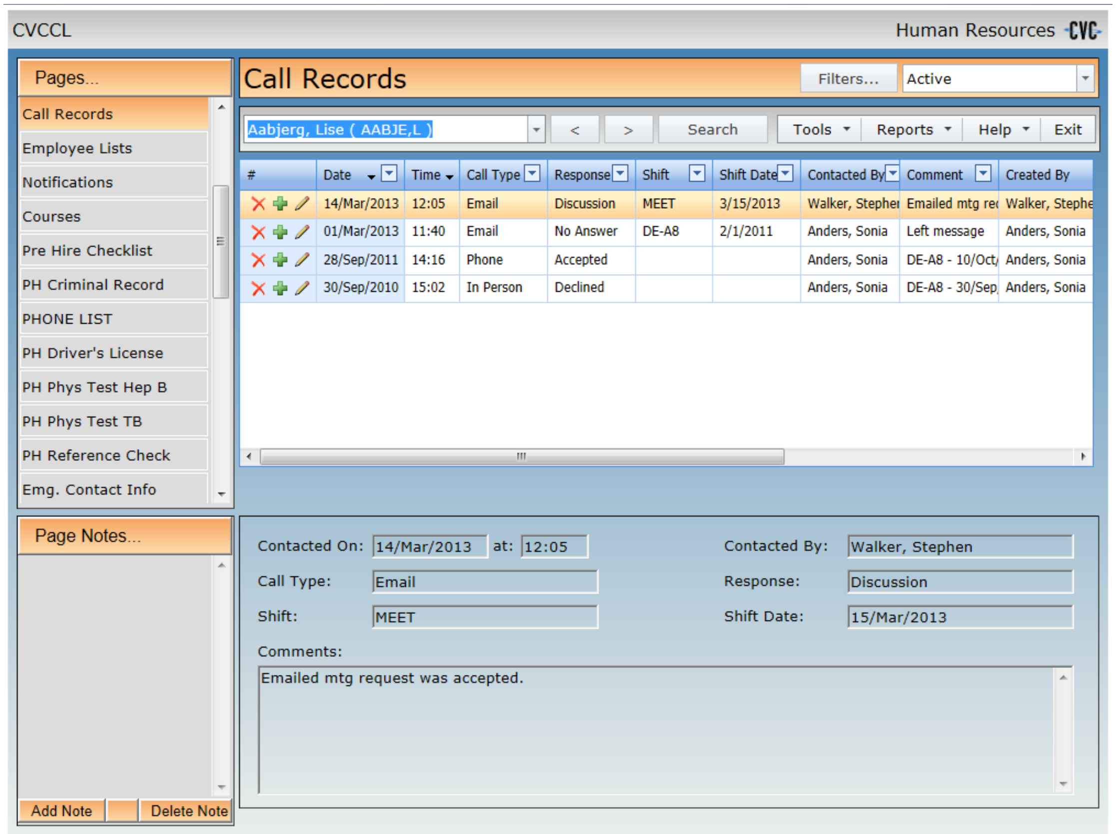
Skill Sets Report

A list of employee skill sets can be printed through Reports | Skill Sets.

3.6 Call Records

The Call Records page in HR provides a history of all recorded interactions (calls, emails, etc.) with the employee.

Calls may be recorded on this page, through Tools | Call an Employee in HR, and in Scheduling (from the **Tools** menu, the **Shifts to be Filled** page and the **Block booking**).



Field Name	Description/Usage
Contacted On	The actual date and time of the call.
Contacted By	The full name of the person who initiated contact.
Call Type	The type of contact made. Call Types are maintained in Enterprise Settings | Lookups (CRType).
Response	The employee's response. Responses are maintained in Enterprise Settings | Lookups (CRResponse).
Shift	A free-form text field that may be used to record the shift for which the employee was contacted. Calls initiated from the Shifts to be Filled page in Scheduling will default to the current shift.
Shift Date	The date for which the employee was called. The Shift Date must be

	entered manually if desired.

To add a new call click the green plus sign ( ).

To edit an existing call click the brown pencil ( ).

To delete a call click the red X ( ).

Skype & Email Links

The Call Employee dialog provides direct links to Skype™, email and other types of internet telephone applications.

Contact Information:

#	Type	Phone/Email
	Primary	250-931-2239
	Secondary	604-220-2032
	Primary	laabjerg@cvccl.bc.ca

To initiate a Skype call to the employee, click the Skype icon ( ) to the left of the phone number you wish to call. Note that you must have already installed Skype and have either a subscription or credits.

To email the employee, click the email icon ( ). A new email, using your default Mail provider, will be displayed with the employee's email address displayed in the **To** field.

To place a call using another provider, click the green telephone icon ( ) to the left of the phone number to be called. As long as the provider is set as the default for **callto** links, the call will be placed automatically.

Page Notes

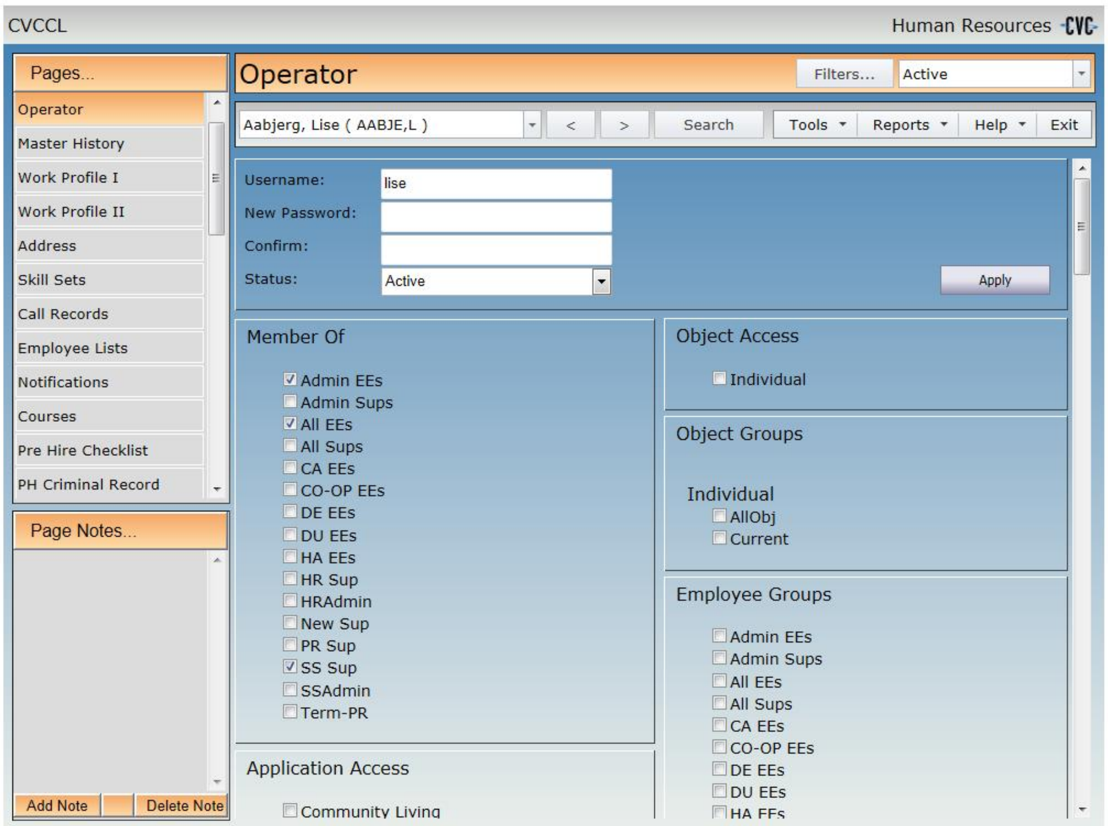
The bottom left of the page contains a Page Notes field like the one in the HR Master page.

Call Records Report

A detailed report of employee call records can be printed through Reports | Call Records.

3.7 Operator

The Operator page in HR combines several pages of security into one page. There are several areas that can be configured for an employee.

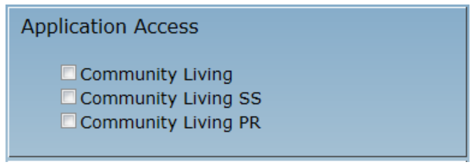


Field Name	Description/Usage
User Name	A unique alpha-numeric code (max length: 20 characters) that the employee will use to login to EMS.
New Password	An encrypted password (min length: 4, max length: 8 characters) that the employee will use to login to EMS. Note: must be identical to the value entered in the Confirm field. For security purposes, once saved this field will not be re-displayed (and will appear empty, however there is no need to re-enter it).
Confirm	An encrypted password (min length: 4, max length: 8 characters) that the employee will use to login to EMS. Note: must be identical to the value entered in the New Password field. For security purposes, once saved this field will not be re-displayed (and will appear empty, however there is no

	need to re-enter it).
Status	The employee's status as a user: Active: can log on to the application(s) Inactive: this user is not allowed to access any EMS (or FMS) application(s) Suspended: this user is not allowed to access any application(s). This status can be used as a temporary setting to distinguish between temporarily and permanently Inactive users.
Member Of	The Employee Groups to which this employee belongs (<u>as an employee</u>). Any user with access to the selected Employee Group(s) will be able to view this employee. For example, a Scheduling Supervisor might be a Member Of the Admin group, the All EEs group and the SS Sup group. That means that any other user with the Admin Employee Group, the All EEs Employee Group and/or the SS Sup Employee Group will be able to see this user/employee.

Object Access	The object(s) this user can access. Objects are accessed via the Object Manager from the Main Menu.
Object Groups	The groups of objects this user can see. A user may have access to more than one object group. Object Groups are managed through the Security | Object Groups page from

	the Main Menu.
Application Access	The database(s) this user can access. To completely prevent a user from accessing an area of EMS, uncheck the Application Access.

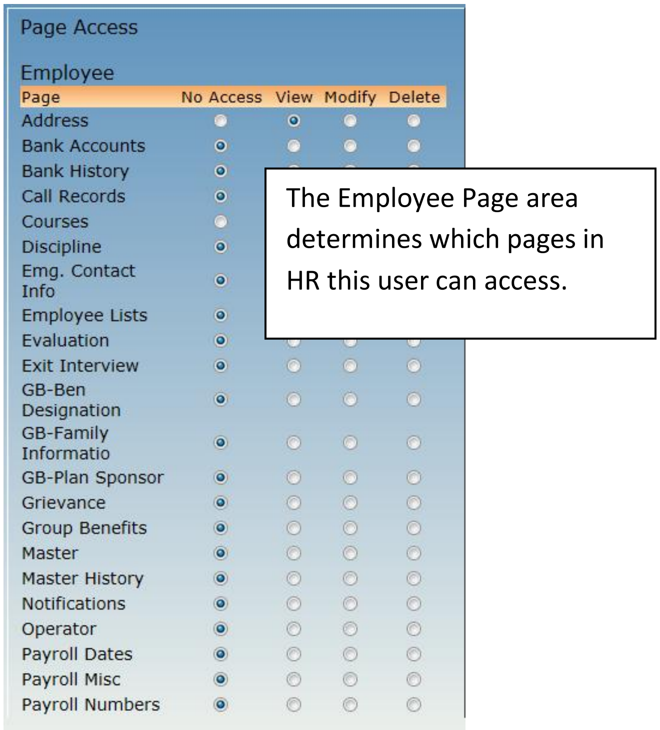


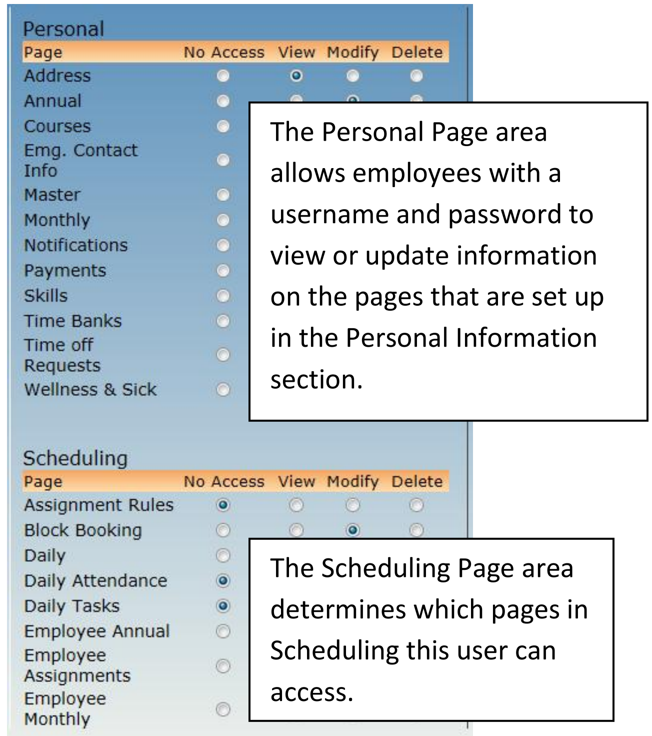
Employee Groups	The groups of employees this user can see. A user can (and often will) have access to more than one employee group. For example the Nursing Supervisor might have access to the Care and Co-op groups of employees. Employee Groups are managed through the Security | Employee Groups page from the Main Menu.

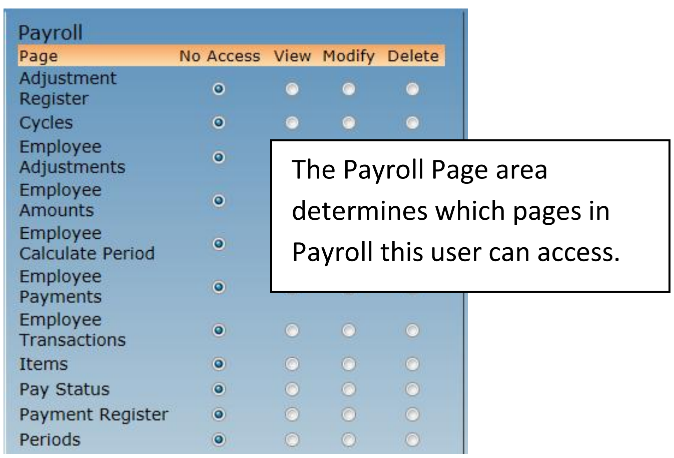
Rights Groups	What the user can do within each database (what functionality they can access). Rights Groups work in combination with the Page Access settings to determine what level of access is allowed for each page and tool in EMS. The lowest level of combined access is applied. For example, a user may have SSAdmin rights which allow delete level of all

	Scheduling tables, but if their SS Page Access has been set to View only, they will only be allowed to view the schedules and assignments on that page. Alternatively, if a user has View only rights in their Rights Group, even with Delete level access to a Page, they will only be allowed to view the page. Rights Groups are managed through the Security | Security Rights page from the Main Menu.

Page Access	The user's page-specific security access levels within each area of EMS. Setting a page to No Access means that this user will not see the page in that application.







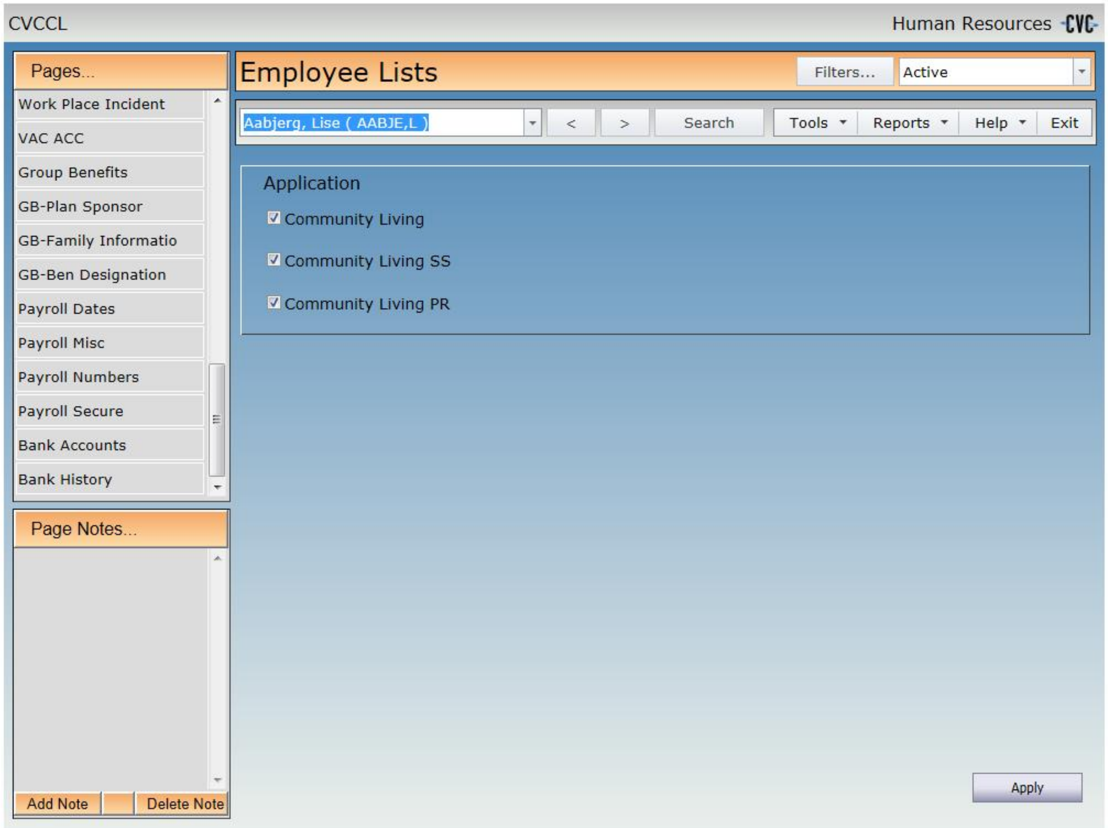
Page Notes

The bottom left of the page contains a Page Notes field like the one in the HR Master page.

3.8 Employee Lists

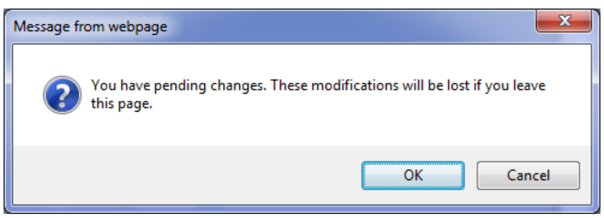
The Employee Lists page in HR determines in which Applications (Databases) the employee will be included. New employees will likely be included in all of the available Applications.

To change which Applications the employee will be viewed in, check or uncheck the box to the left of the Application name.



When completed, click **Apply.**

If you move away from the page without clicking Apply, the following message will appear:



Click OK to leave the page and discard your changes. Click Cancel to return to the page and then click Apply to save your changes.

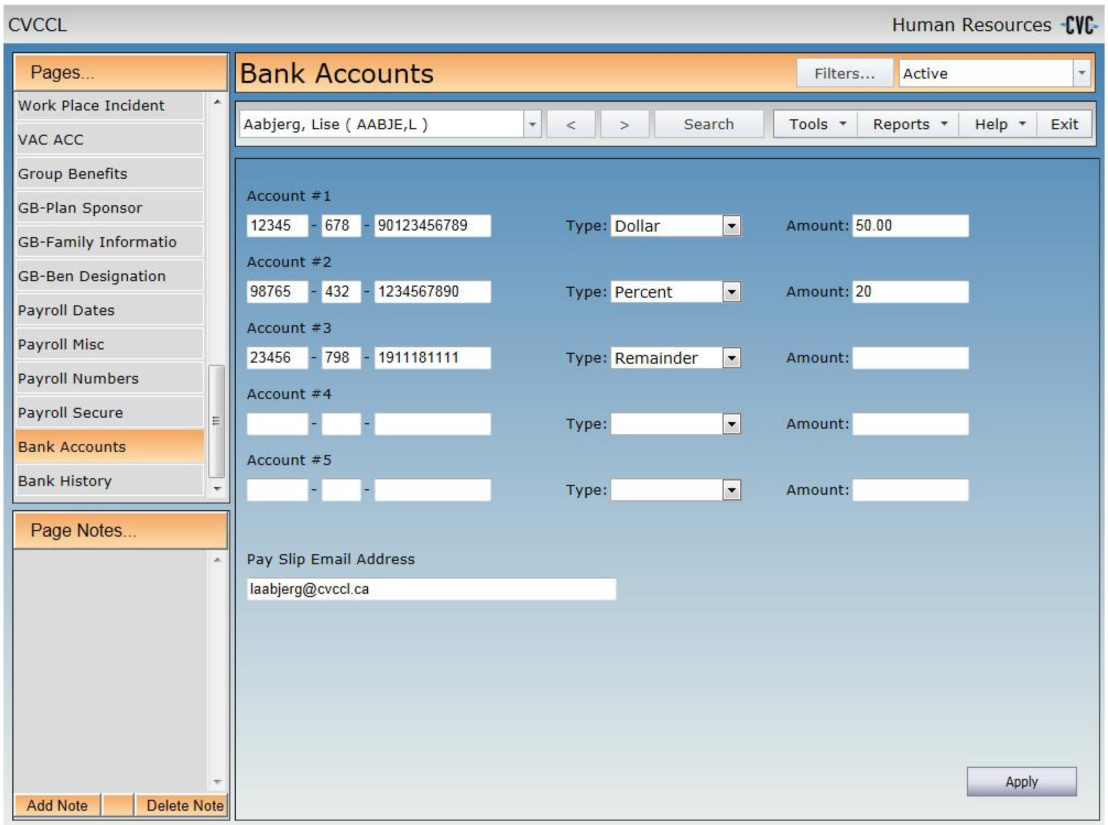
Page Notes

The bottom left of the page contains a Page Notes field like the one in the HR Master page.

3.9 Bank Accounts

The Bank Accounts page in HR stores direct deposit information for the employee. Up to five bank accounts can be set up, along with the employee's email address for pay slips (which may differ from the ones entered in the Address page).

Payroll uses the bank accounts to generate the direct deposit file to send to the bank.



Employees must have at least one bank account in order to be paid through direct deposit. The five bank accounts can be set up with different break-downs, but the final bank account must always have a Type of Remainder.

Employees that do not have any bank accounts will be paid by cheque. Employees with no pay slip email address may be paid by direct deposit, but their slip will be printed rather than emailed.

Field Name	Description/Usage
Account (#1-#5)	The employee's bank account.
Type	The type of breakdown for the bank account, where

	• Dollar indicates a fixed dollar amount to be deposited to the account, • Percent indicates that a percentage of the net pay (at that point in the calculation) will be deposited to the account, and • Remainder indicates that the remaining net pay (at this point in the calculation) will be deposited to the account.
Amount	For Dollar breakdown settings, the actual dollar amount to be deposited and for Percent breakdowns, the percentage of net pay to be deposited. Remainders do not require an Amount.
Pay Slip Email Address	The email address for the pay slip. If no email address is specified, a pay slip can be printed and given to the employee instead.

The accounts are processed in order, so it is important to enter them correctly. For example, the employee above has 3 bank accts and a net pay of $1000, so their pay would be broken out as follows:

Account #1 $50 Dollar = $50

Account #2 20 Percent = ($1000 - $50) * .20 = $190

Account #3 Remainder = $1000 - $50 - $190 = $760

but if the order were reversed:

Account #1 20 Percent = $1000 * .20 = $200

Account #2 $50 Dollar = $50

Account #3 Remainder = $1000 - $200 - $50 = $750

Note that the employee will *never receive more than their net pay*, so the breakdown settings will be applied until the balance is $0. For example, if an employee has a net pay of $500 with the following breakdowns their pay would be processed as:

Account #1 50 Percent = $500 * .50 = $250

Account #2 $300 Dollar = $500 -$250 - $300 = $250

Account #3 Remainder = $0

Page Notes

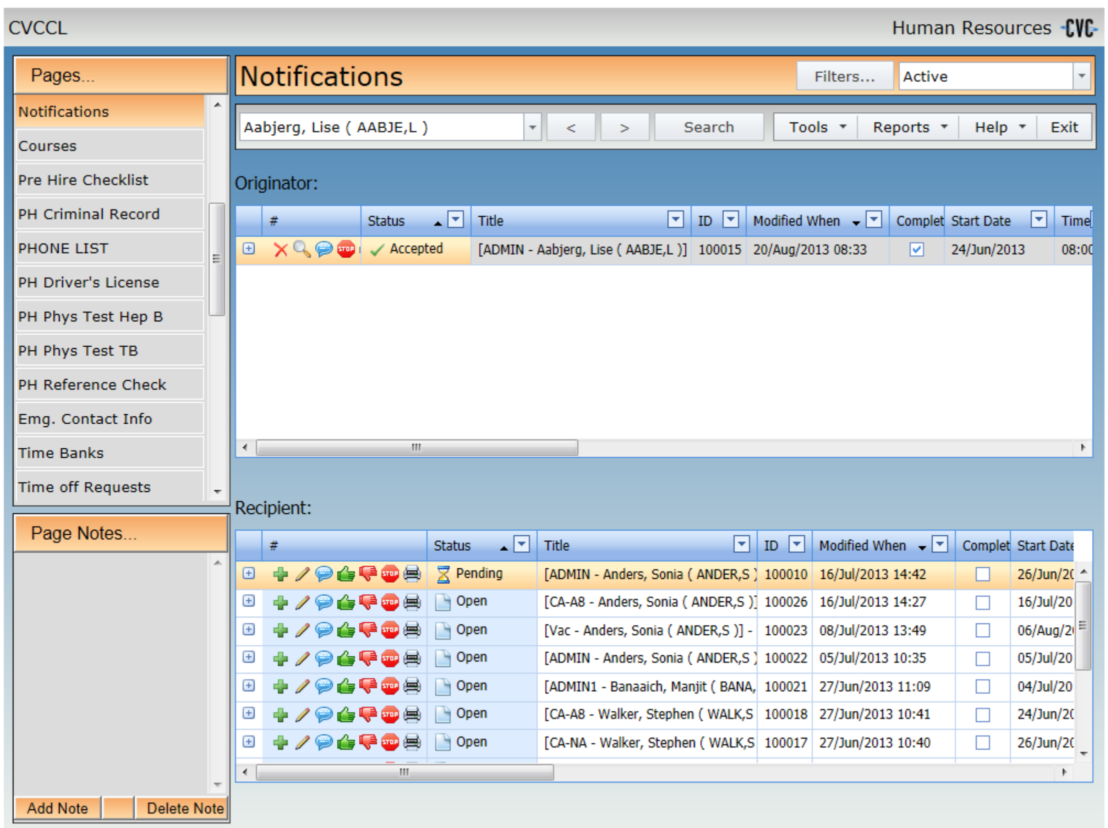
The bottom left of the page contains a Page Notes field like the one in the HR Master page.

3.10 Notifications

Notifications in EMS allow employees to have a recorded two-way conversation with supervisors, department heads and other staff regarding topics such as Scheduling changes (vacation requests, hours worked, etc), HR updates (expiring skill sets, upcoming reviews, etc.) and Events (meetings, policy changes, etc).

Each conversation is a cycle that has a distinct start and end. A user begins a cycle by creating (originating) a notification and selecting other users as recipients. Recipients can then make decisions about the notification. They may accept it, reject it or send it back to the originator for clarification. When the cycle is finished, the notification is flagged as completed.

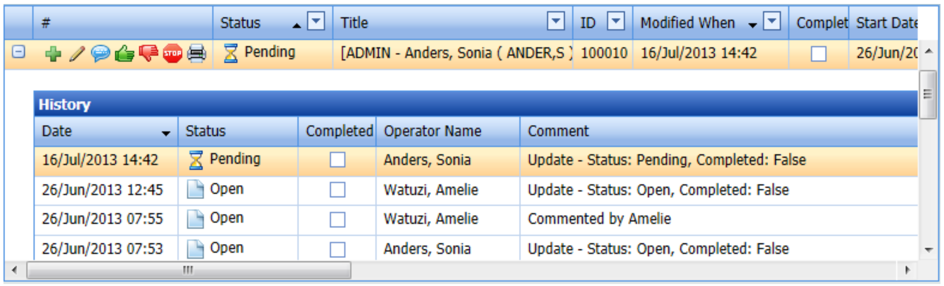
The Notifications page in HR displays all notifications created by and sent to the employee. Notifications the employee has created are listed at the top, in the Originator grid and notifications the employee has received are listed in the lower Recipient grid.



Field Name	Description/Usage
Status	The current status of the notification, where Open indicates a new request, Pending indicates that the request is being reviewed, Info indicates that more information has been requested, InfoSupplied indicates that additional information has been provided, Accepted indicates that the request has been accepted, Rejected indicates that the request was not accepted, and Cancelled indicates that the request was cancelled.
Title	The title or description of the notification.
ID	A unique identification number for reference purposes.
Modified When	The date and time of the most recent change to the notification.
Completed	A flag indicating that the notification is complete. Completed notifications cannot be updated, however they can be cancelled. They are not included in the Notification Count displayed in the tool bar in Scheduling.
Start Date	The start date of the request or notification. For an event notification, this may be the same as the end date.
Time	The start time of the request or notification. It may be 00:00 if the time is not applicable.
End Date	The end date of the notification. For an HR notification, this may also be the due date.
Time	The end time of the request or notification. It may be 00:00 if the time is

	not applicable.
Type	The notification type, where • Scheduling indicates a request or notification related to the employee's assignments in Scheduling, • HR indicates a request or notification related to human resources, for example, an expiry date is coming up or a review is pending, and • Event indicates a generic notification of an upcoming meeting or other type of event.
Notification Date	The date the notification was created.
Employee	For Scheduling and HR notifications, the employee for whom the notification was created. Event notifications do not apply to a specific employee.
Shift	For Scheduling notifications, the shift that is being requested, e.g. a vacation shift, or the shift the employee worked for a worked hours notification.
Department	For Scheduling notifications, the department in which the employee worked or requested. For HR and Event notifications, the department affected by the request or notification.
Unit	For Scheduling notifications, the unit in which the employee worked or requested. For HR and Event notifications, the unit affected by the request or notification, if applicable.
Position	For Scheduling notifications, the position in which the employee worked or requested. For HR and Event notifications, the position affected by the request or notification, if applicable.
Cost Centre	For Scheduling notifications, the cost centre in which the employee worked or requested. For HR and Event notifications, the cost centre affected by the request or notification, if applicable.
Created By	The user that created the notification.
Created When	The date and time the notification was created.
Modified By	The last person to modify the notification.

To view the notification's comments and history, click the small plus sign ( ) at the far left of the grid row.



The Originator grid might have the following command button icons (depending on the notification type and user security):

Action	Icon	Description
Edit		Edit an existing notification that has not been accepted, rejected or cancelled.
View		View a notification that has already been accepted, rejected or cancelled.
Cancel		Cancel an existing notification that has not already been rejected.
Update		Change the status, add a comment, and/or flag the notification as Complete.
Delete		Delete cancelled or completed notifications.
Print		Display the current notification slip in a report format.

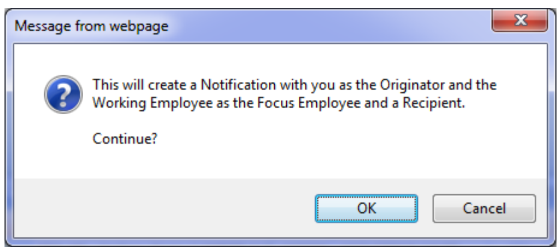
The Recipient grid might have the following command button icons (depending on notification type and user security):

Name	Icon	Notes
Add		Create a new notification.
Edit		Edit an existing notification that has not been accepted, rejected or cancelled.

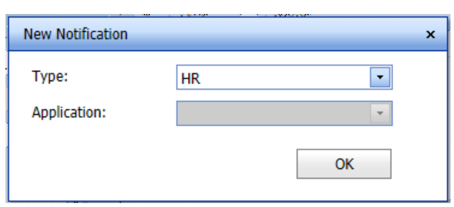
View		View a notification that has already been accepted, rejected or cancelled.
Update		Change the status, add a comment, and/or flag the notification as Complete.
Accept		Flag the notification as accepted.
Reject		Flag the notification as rejected.
Cancel		Flag the notification as cancelled.
Print		Display the current notification slip in a report format.

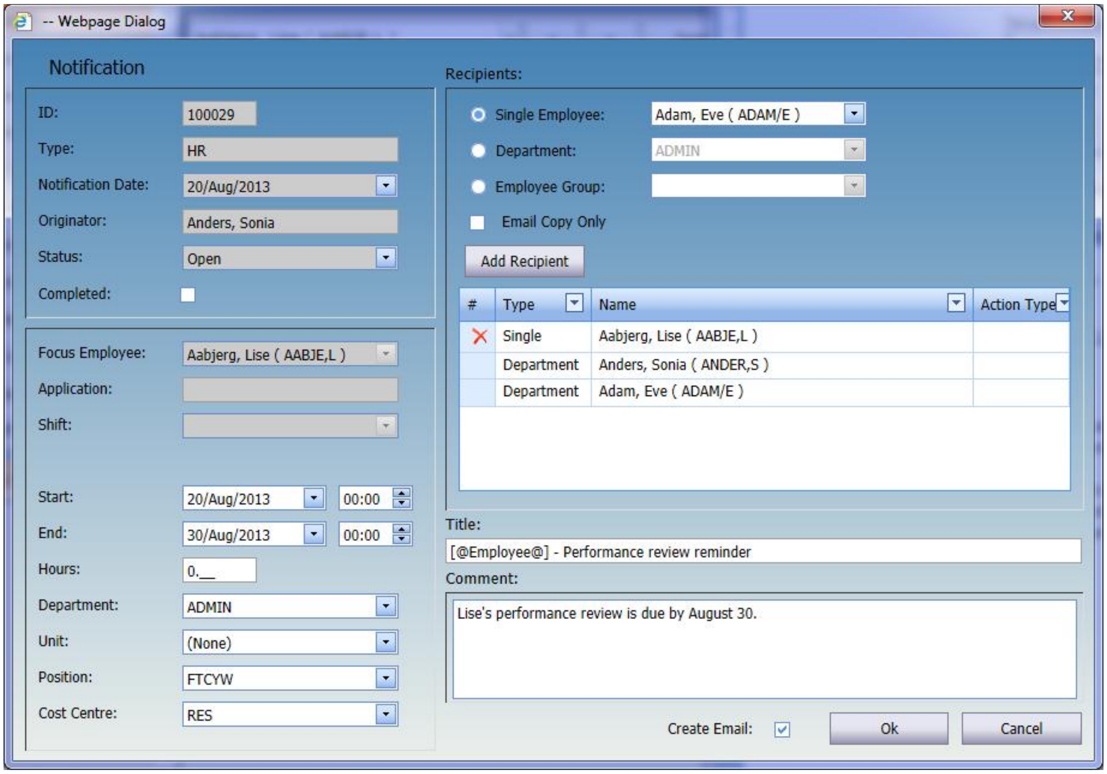
Create a Notification

To create a new notification, click the green plus icon ( ) in the Recipient grid. When a notification is created in HR, it has the current user as the originator and the current employee set as the focus employee and as a recipient. As a reminder, a confirmation message will be displayed.



Click OK and select the type of notification to create. When a Scheduling notification is created, sites with multiple Scheduling databases will need to choose the appropriate Application database. HR and Event requests do not require additional information.





Field Name	Description/Usage
ID	A unique identification number for reference purposes. This number is automatically assigned and cannot be changed, however, the starting number can be updated in Enterprise Settings | Company Settings.
Type	The notification type selected during creation. Once a notification is created, the type cannot be changed.
Notification Date	The date the notification was created. The date is set automatically and cannot be changed.
Originator	The user that created the notification.
Status	The current status of the notification, where Open indicates a new request, Pending indicates that the request is being reviewed,

	Info indicates that more information has been requested, InfoSupplied indicates that additional information has been provided, Accepted indicates that the request has been accepted, Rejected indicates that the request was not accepted, and Cancelled indicates that the request was cancelled.
Completed	A flag indicating that the notification is complete. Note that the rules set up in Enterprise Settings | Notification Types determine whether or not the Originator and/or the Recipient(s) can mark a notification as completed. Completed notifications are not included in the Notification Count displayed in the tool bar in Scheduling.
Focus Employee	For Scheduling and HR notifications, the employee for whom the notification was created. Event notifications do not apply to a specific employee. When a notification is created in HR, the Focus Employee is defaulted to the current employee and cannot be changed.
Application	For Scheduling notifications, the database for which the request or notification is being made (for sites with multiple Scheduling databases).
Shift	For Scheduling notifications, the shift that is being requested, e.g. a vacation shift, or the shift the employee worked for a worked hours notification.
Start Date & Time	The start date and time of the request or notification. For an event notification, this may be the same as the end date. The time can be left as 00:00 if not applicable.
End Date & Time	The end date and time of the notification. For an HR notification, this may also be the due date. The time can be left as 00:00 if not applicable.

Hours	For Scheduling notifications, the number of hours requested off or the number of hours worked. Note that the hours specified in the notification will be defaulted into the Shift Handle or Multiple Substitution tool in Scheduling, however they may be overridden if necessary. For HR & Event notifications, this would likely be the duration of the event.
Department	For Scheduling notifications, the department in which the employee worked or requested. For HR and Event notifications, the department affected by the request or notification.
Unit	For Scheduling notifications, the unit in which the employee worked or requested. For HR and Event notifications, the unit affected by the request or notification, if applicable.
Position	For Scheduling notifications, the position in which the employee worked or requested. For HR and Event notifications, the position affected by the request or notification, if applicable.
Cost Centre	For Scheduling notifications, the cost centre in which the employee worked or requested. For HR and Event notifications, the cost centre affected by the request or notification, if applicable.
Recipients	The list of users that will be receive this notification. The current (Focus) employee will be automatically included in the Recipient list, along with any other individuals or groups that have been configured in the Enterprise Settings | Notification Types. If the employee or any non-mandatory users should not receive the notification, click the red X () in the list to remove their name from the Recipients list. Additional user(s) can be added to the Recipient list as well. Select the appropriate type of recipient: • Single will allow the selection of any user, • Department is used to send a notification to the department head or employee group specified in Enterprise Settings | Departments, or

	• Employee Group to include a group of users by selecting from a list of Employee Groups that have been flagged for notifications in Security | Employee Groups. Check the Email Copy Only box if the selected recipient(s) should only receive a copy of the notification email. In this case, the actual notification will not appear in their Notifications page in Personal Information (and Scheduling for users with appropriate security rights). Click the Add Recipient button to add the selected recipient(s) to the Recipient List.
Title	The title or description of the notification. The Title will also appear in the Subject line of the email. In addition to the Notification Type Description, there are two special codes that are defaulted into the Title. They will be resolved automatically when the notification is saved: @ShiftCode@ - will be converted to the selected Shift when a Scheduling notification is created and @Employee@ - will be converted to the employee's display name and code. The Title may be changed as necessary.
Comment	A free-form text field for recording additional information. The Comments will be stored and displayed in the history of the notification and cannot be changed once the notification is saved.
Create Email	A flag indicating that an email should be created when the notification is saved. The email will automatically be created with the user's current email program and displayed for review. To send the email, press the Send button. If the Create Email flag is unchecked or the email is not sent, the notification will appear in the recipient(s) Notification in Personal Information (and Scheduling for users with appropriate security rights) unless the recipient was flagged as "Email Only", in which case they will not receive any information regarding the notification.

Page Notes

The bottom left of the page contains a Page Notes field like the one in the HR Master page.

Notifications Report

A detailed or summary list of employee notifications can be printed through Reports | Notifications.

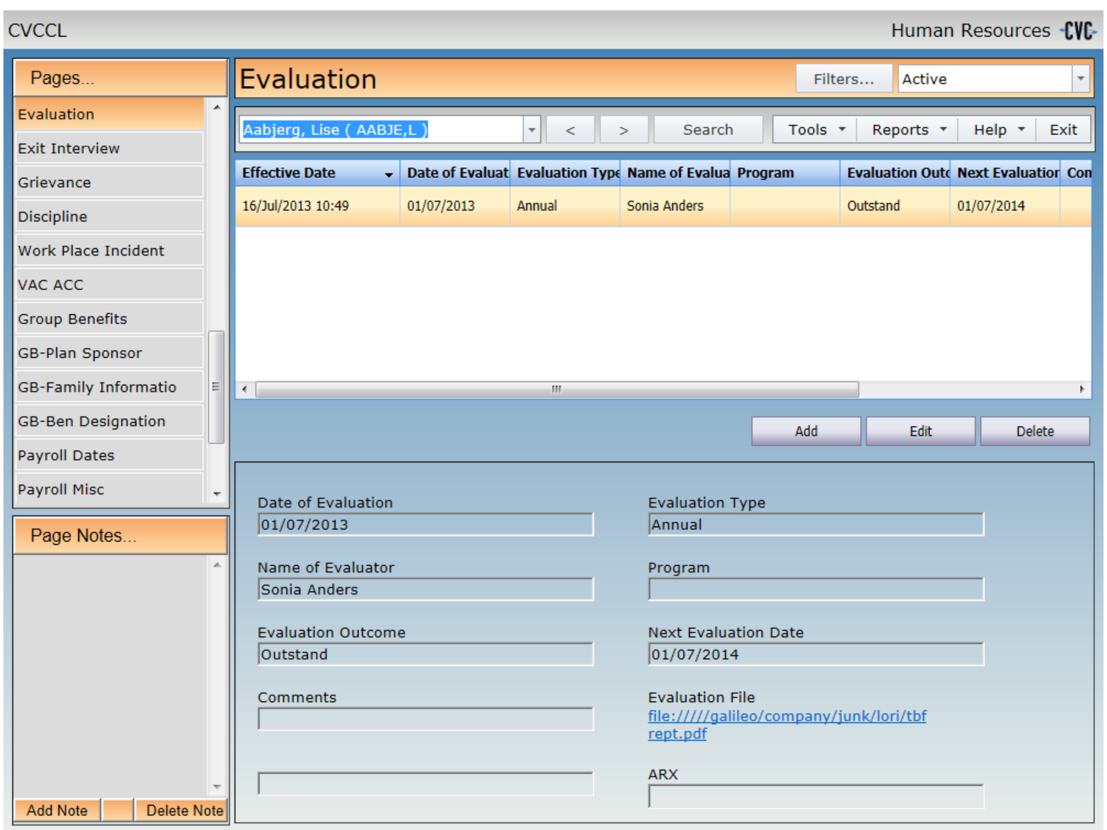
4 USER-DEFINED PAGES

Human Resources is designed to track an unlimited amount of employee-specific information as required for organizational reporting and data management.

Authorized users can design and create user-defined fields and pages based on Collective Agreements, Government Standards and Employee Policies, including

- Evaluations
- WCB\WSIB Claims
- Grievances
- Accruals
- Group Benefits
- Payroll Dates

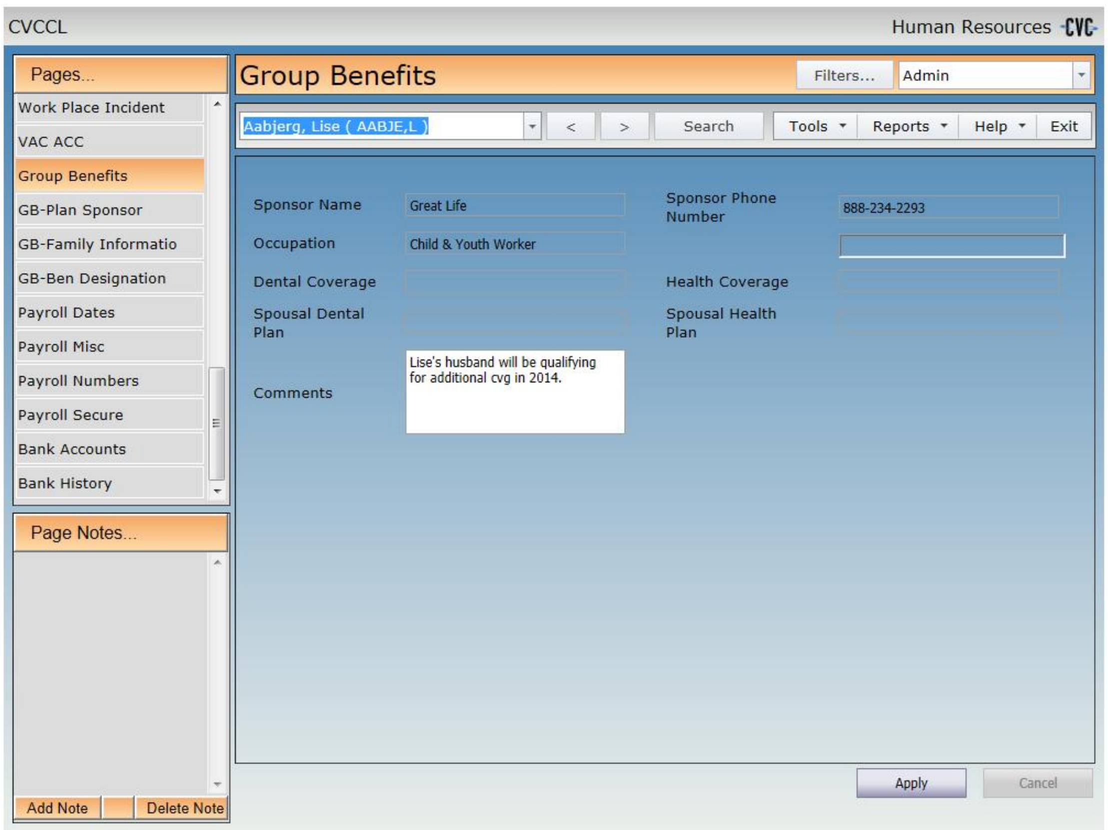
Historical, current and future-dated information pertaining to each topic can be maintained in HR. Pages and fields are defined in Enterprise Settings | Pages and Enterprise Settings | Fields.



4.1 Current Values Pages

Current value pages in HR always display the employee's current values. These types of pages are useful when only the current values are relevant to the employee. They may also be used to display aggregate data from several related pages.

Users that have “Modify” (or higher) level security for Employee Information, as well as “Modify” (or higher) level access for the HR page, can change editable data on that page. Click Apply to save changes.



Note that modifying or deleting data on a Current Values page will create a historical row with the current system date & time. The history for these fields can be displayed on a secondary Carry Forward page or viewed through Reports | User Defined.

4.2 Carry Forward Pages

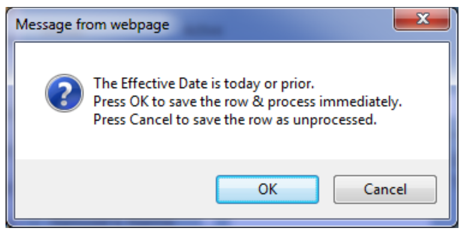
Carry Forward pages in HR retain the values of unchanged fields when new data is added. Carry Forward pages are designed for information such as Benefits, where one field may need to be updated on a regular basis, but other fields may remain the same.

Adding User Defined Data

Selecting the Add button in a Carry Forward page displays a dialog where new data can be entered in selected fields. Select a field by checking the box between the label (name) and the field, then enter the appropriate information. To clear the value when data is no longer needed, check the Clear Value box to the right of the field.

To enter future-dated changes, set the Effective Date and time to the desired date the changes are to be applied. The changes will be saved as unprocessed, i.e. the changes will not be applied to the employee's current values until Tools | Process HR Data is run. Unprocessed rows will appear italic.

If the Effective Date is not changed or is set to a date in the past, a prompt will be displayed to confirm that the changes should be processed immediately.



If you select **Cancel**, the row will be saved as unprocessed, i.e. the changes will not be applied to the employee's current values until Tools | Process HR Data is run. Unprocessed rows will appear italic.

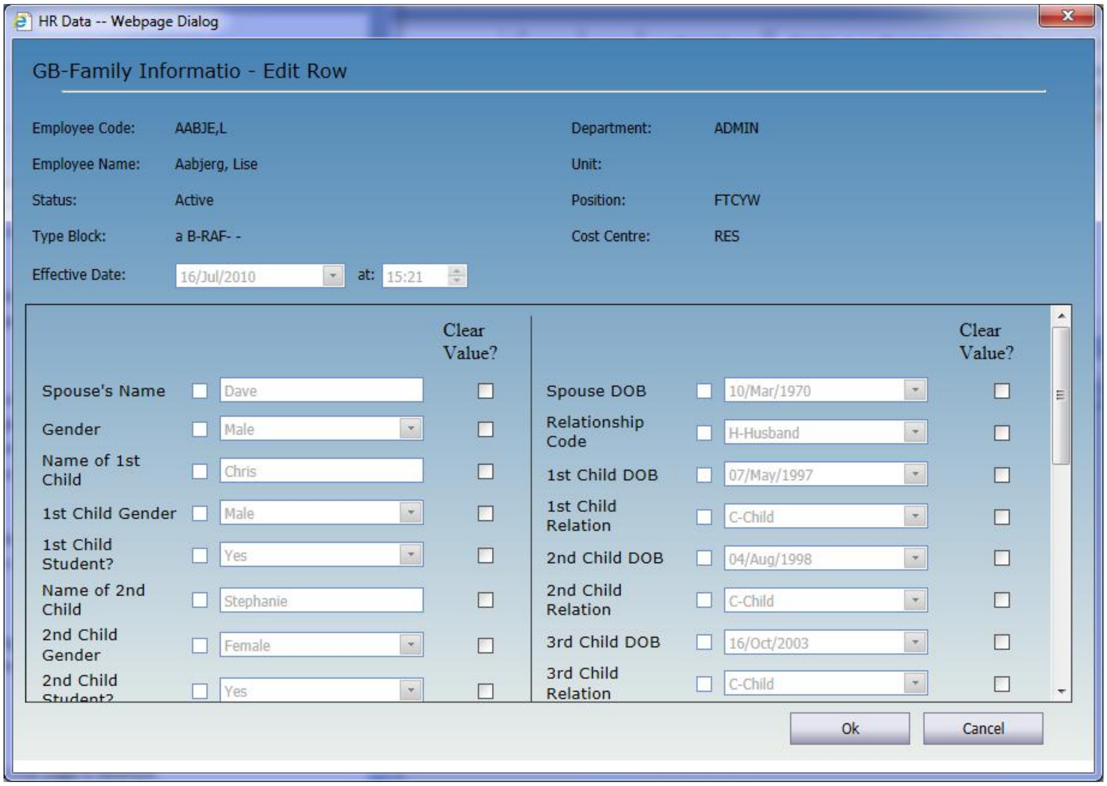
Select **OK** to apply the changes immediately.

Users that have “Modify” (or higher) level security for Employee Information, as well as “Modify” (or higher) level access for the HR page, can add data to that page.

Modifying User Defined Data

Selecting the Edit button in the HR Pages displays a dialog with the data from the selected row. All of the fields will be disabled to prevent accidental changes. To modify the contents of a field, enable the field by checking the box between the label (name) and the field, then enter the appropriate information. To clear the value when data is no longer needed, check the Clear Value box to the right of the field.

Users that have “Modify” (or higher) level security for Employee Information, as well as “Modify” (or higher) level access for the HR page, can modify data on that page.



Deleting User Defined Data

Selecting the Delete button in the HR Pages allows removing processed (historical) data in HR. Users that have “Delete” level security for Employee Information, as well as “Delete” level access for the HR page, can remove any given row.

A few rules apply:

When deleting a row, only information that is editable on that page is deleted.

Individual columns may not be deleted. All information for that row is removed.

Certain **system-defined fields require that a value is present**, even if that value is blank. Deleting the last value for one of these fields will result in an item being added with an Effective Date of the current working date and “<no value>” being displayed for the column. This primarily concerns fields found on the Work Profile I and Work Profile II pages.

Page Notes

The bottom left of each page contains a Page Notes field for recording information related to the current employee and page.

User Defined Report

A detailed or summary list of user defined employee information can be printed through Reports | User Defined.

4.3 No Carry Forward Pages

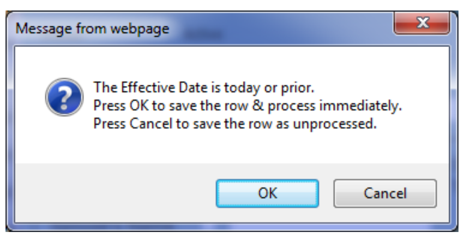
No Carry Forward pages in HR *do not* retain the values of unchanged fields when new data is added. No Carry Forward pages are designed for recording information such as Incidents or Courses, where each row represents an individual occurrence with little or no relation to the other rows on the page.

Adding User Defined Data

Selecting the Add button in a No Carry Forward page displays a dialog where new data can be entered. To clear a field, for example a date, when data is not applicable for this occurrence, check the Clear Value box to the right of the field.

To enter a future-dated occurrence, set the Effective Date and time to the appropriate the date the changes are to be applied. The row will be saved as unprocessed until Tools | Process HR Data is run. Unprocessed rows will appear italic.

If the Effective Date is not changed or is set to a date in the past, a prompt will be displayed to confirm that the row should be processed immediately.



If you select **Cancel**, the row will be saved as unprocessed, i.e. the changes will not be applied until Tools | Process HR Data is run. Unprocessed rows will appear italic.

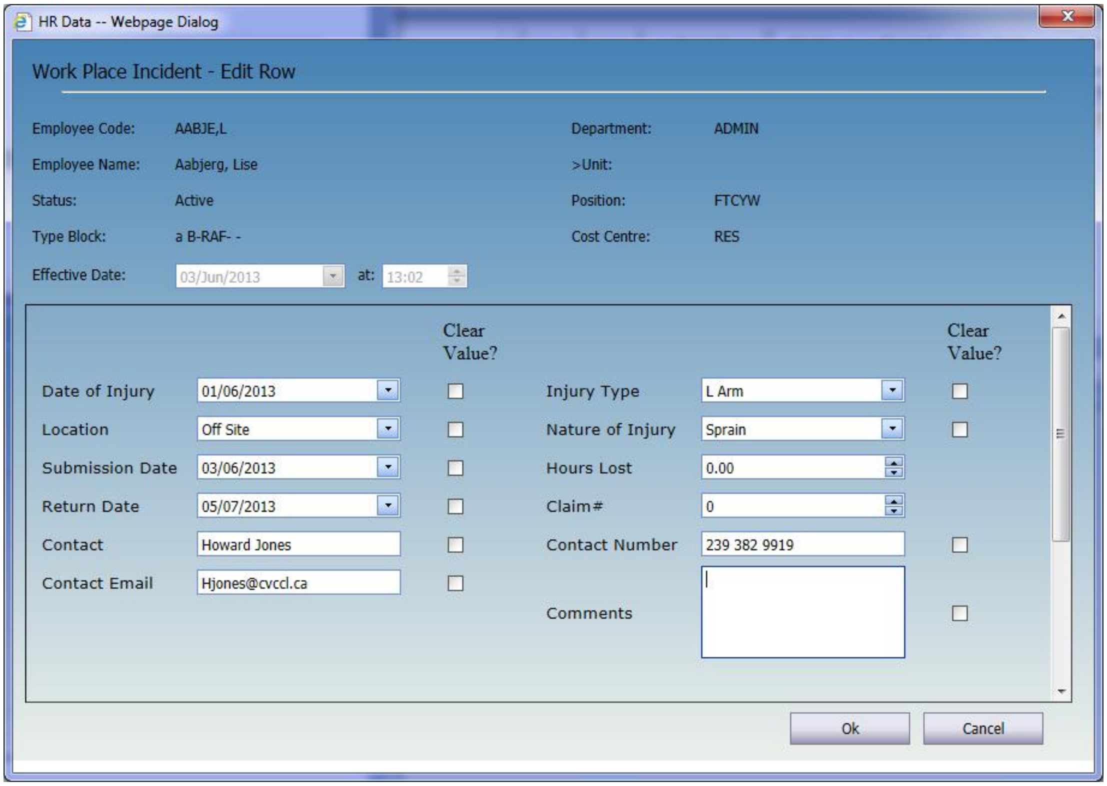
Select **OK** to apply the changes immediately.

Users that have “Modify” (or higher) level security for Employee Information, as well as “Modify” (or higher) level access for the HR page, can add data to that page.

Modifying User Defined Data

Selecting the Edit button in a No Carry Forward page displays a dialog with the data from the selected row. All editable fields will be enabled. To clear a field when the data is no longer applicable, check the Clear Value box to the right of the field.

Users that have “Modify” (or higher) level security for Employee Information, as well as “Modify” (or higher) level access for the HR page, can modify data on that page.



Deleting User Defined Data

Selecting the Delete button in the HR Pages allows removing processed (historical) data in HR. Users that have “Delete” level security for Employee Information, as well as “Delete” level access for the HR page, can remove any given row.

A few rules apply:

When deleting a row, only information that is editable on that page is deleted.

Individual columns may not be deleted. All information for that row is removed.

Certain **system-defined fields require that a value is present**, even if that value is blank. Deleting the last value for one of these fields will result in an item being added with an Effective Date of the current working date and “<no value>” being displayed for the column. This primarily concerns fields found on the Work Profile I and Work Profile II pages.

Page Notes

The bottom left of each page contains a Page Notes field for recording information related to the current employee and page.

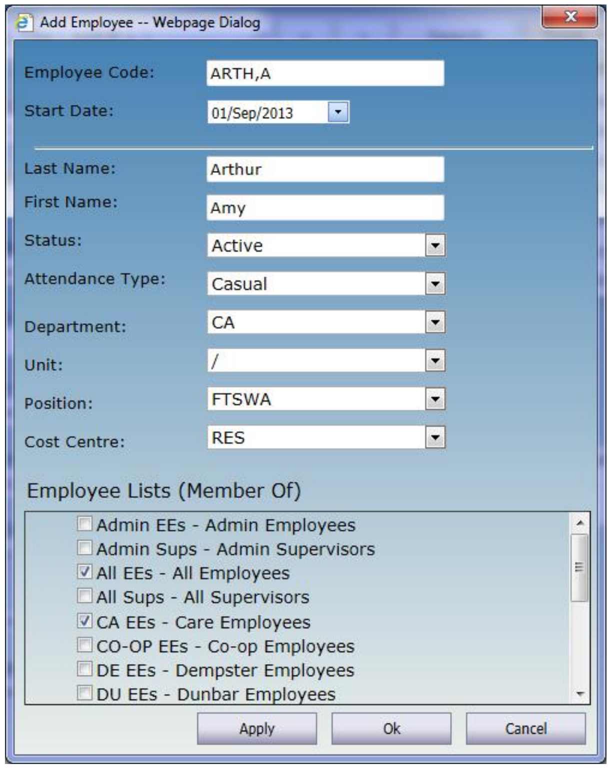
User Defined Report

A detailed or summary list of user defined employee information can be printed through Reports | User Defined.

5 TOOLS

5.1 Add an Employee

Employees are created in HR manually or via Tools | Import Employees. To manually add a new employee, click Tools | Add an Employee.



Field Name	Description/Usage
Employee Code	A unique alpha-numeric code used throughout EMS to identify the employee. Use a format consistent with other employees.
Start Date	The employee's first day of work.
Last Name	The employee's last name(max length: 25 characters). The Display name used in the dropdown lists, reports, etc. is built automatically using the First Name, Last Name.
First Name	The employee's first name(max length: 25 characters). The Display name used in the dropdown lists, reports, etc. is built automatically using the First

	Name, Last Name.
Status	The employee's status, normally Active unless the employee will not be working.
Attendance Type	The employee's attendance type, usually indicating full-time, part-time, casual, etc. Attendance types are maintained in Enterprise Settings | Look-up Codes. The Attendance type block character is automatically stored in the sixth position of the employee's type block.
Department	The employee's home department. An employee may work in several departments, but this is their default department for assignment generation in Scheduling and amounts configuration in Payroll. The Department is a required field. The Department's type block character is automatically stored in the first position of the employee's type block.
Unit	The employee's home unit. An employee may work in several units, but this is their default unit for assignment generation in Scheduling and amounts configuration in Payroll. The Unit is *not* a required field. The Unit's type block character is automatically stored in the second position of the employee's type block.
Position	The employee's home position. An employee may work several positions, but this is their default position for assignment generation in Scheduling and amounts configuration in Payroll. The Position is a required field. The Position's type block character is automatically stored in the third position of the employee's type block.
Cost Centre	The employee's home Cost Centre. An employee may work in several cost centres, but this is their default cost centre for assignment generation in Scheduling and amounts configuration in Payroll.

	The Cost Centre is a required field. The Cost Centre's type block character is automatically stored in the fourth position of the employee's type block.
Employee Lists	The Employee Groups in which the employee will be included. Only users with access to the selected groups will be able to view the employee.

Complete the information on the screen and click the **OK** button.

Go to the Employee Lists page in HR and ensure that all Applications in which the employee should appear have been checked.

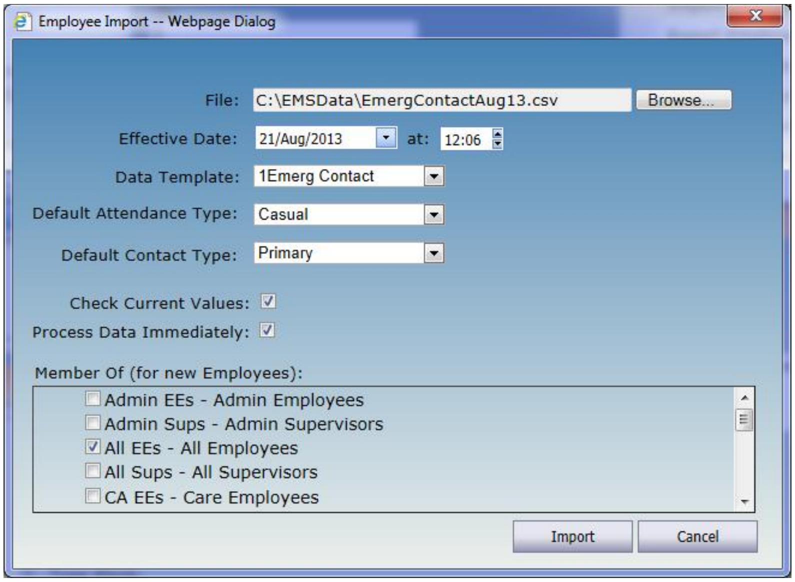
Proceed to the Master, Work Profile I, Work Profile II and Address pages in HR to enter the remaining employment and demographic information for the employee.

If the employee will be given access to Personal Information or other areas of EMS, configure their login and security information on the Operator page in HR.

5.2 Import Employees

The Import Employees tool in HR is used to read in a comma-delimited file and create entries in virtually all HR pages.

The Data Template in Enterprise Settings must first be defined - it will dictate the layout and contents of the import file. Once a Data Template has been created, use the Export Employees tool to create a comma-delimited file in the required format. That file can be edited and then the contents imported through the Import Employees tool to create new entries in HR.



To import employee information:

Click Tools | Import Employees.

Click the **Browse…** button to select the file.

If necessary, update the **Effective Date** and **time**. This will determine whether historical, current or future-dated data is imported.

Select the appropriate **Data Template**.

Select the **Default Attendance Type**. This will only be used if new employees are being imported.

Select the **Default Contact Type**. This will only be used if new addresses, phone numbers or email addresses are being imported.

Leave **Check Current Values** checked to skip unchanged data. To import all of the data, regardless of whether it has changed or not, uncheck this box.

To make the data active, leave **Process Data Immediately** check.

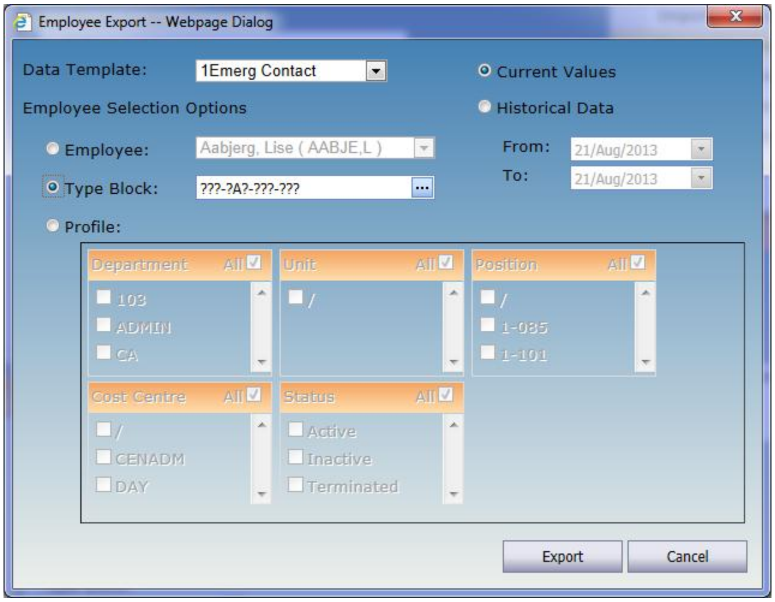
Click the **Import** button.

After the rows are imported, the number of rows processed will be displayed.

If any errors occur, the row number and a description of the error will be displayed. Make the necessary corrections and import the file again.

5.3 Export Employees

The Export Employees tool creates a comma-delimited text file containing selected Employees and current or historical HR values. When current values are exported, the resulting file can be edited through Microsoft Excel© and then imported to create new entries in HR. This is a quick way to update several employees' information at once.



Current Values

To create new entries in HR:

Click Tools | Export Employees.

Select the **Data Template** that contains the fields to be exported.

Select the **Employees** to be included in the process.

Select **Current Values**.

Click the **Export** button.

When the export file is ready, a link will display at the bottom left of the screen, **Export Complete. Click here to download your file**. Click the link and save the file with an extension of .CSV.

Open the file with Excel© and make the appropriate changes (do not remove any columns since the import requires the file to be in the same format). New rows may also be added to the file as necessary.

When all of the changes have been made, use the Import Employees tool to create the new entries.

Historical Data

To export historical HR data for further analysis and reporting:

Click Tools | Export Employees.

Select the **Data Template** that contains the fields to be exported.

Select the **Employees** to be included in the process.

Select **Historical Data**.

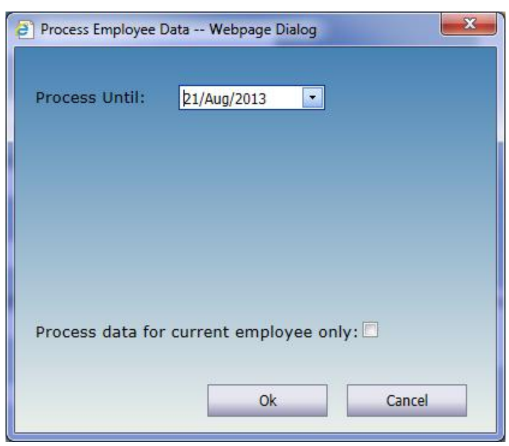
Enter the date range to be exported. The export uses the Effective Date when exporting historical values.

Click the **Export** button.

When the export file is ready, a link will display at the bottom left of the screen, **Export Complete. Click here to download your file**. Click the link and save the file with an extension of .CSV.

5.4 Process HR Data

Unprocessed (pending) rows will appear in *italics* in HR. This is data that was originally entered with a future effective date and saved without processing. The data will remain unprocessed until the Process HR Data tool is run for a date later than the effective date.



To process pending data:

Click Tools | Process HR Data.

Select date up to which rows should be processed.

If only unprocessed rows for the current employee are to be processed, check **Process data for current employee only**, otherwise leave it unchecked.

Click the **OK** button.

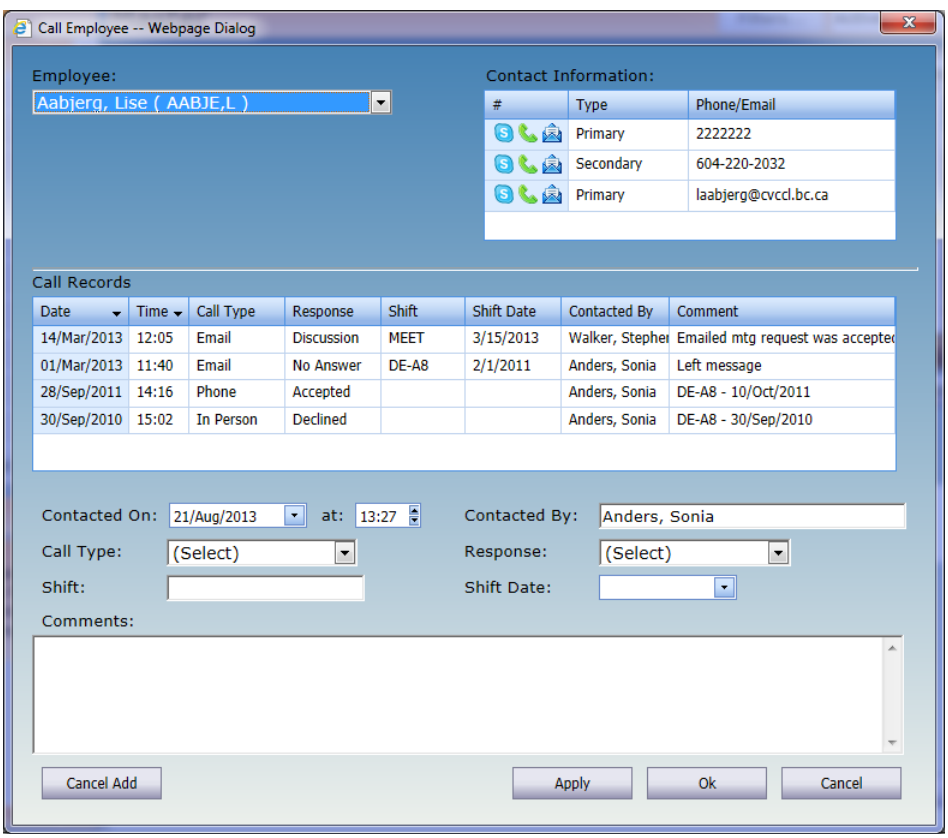
After the rows are processed, the pending data will become current.

Note: The system will not process future dated items automatically. You must run this tool to have the pending changes applied.

5.5 Call an Employee

The Call an Employee tool in HR is used to record interactions (calls, emails, etc.) with the employee.

Calls may be recorded using this tool, through Call Records page in HR, and in Scheduling (from the **Tools** menu, the **Shifts to be Filled** page and the **Block booking**).



The tool is initially opened in 'Add mode' so that a new call can quickly be recorded. To update an earlier call, click the Cancel Add button and select the call to be changed. To add multiple calls, use the Apply button to save the call and then click the Add button to create a new one, either for the current employee or another employee.

Field Name	Description/Usage
Employee	The employee that was or will be contacted.
Contact Information	The employee's current phone numbers and email addresses . Skype & local Email can be use to contact the employee as well as traditional telephone calls.
Call Records	A list of previous calls or emails to the employee. To view or update the details of a previous call, click the Cancel Add button and select the row.
Contacted On	The actual date and time of the call.
Contacted By	The full name of the person who initiated contact.
Call Type	The type of contact made. Call Types are maintained in Enterprise Settings | Lookups (CRType).
Response	The employee's response. Responses are maintained in Enterprise Settings | Lookups (CRResponse).
Shift	A free-form text field that may be used to record the shift for which the employee was contacted. Calls initiated from the Shifts to be Filled page in Scheduling will default to the current shift.
Shift Date	The date for which the employee was called. The Shift Date must be entered manually if desired.

To add another new call click the Add button.

To edit an existing call click the Apply button to save the current call or Cancel Add.

To delete a call, go to employee's Call Record page in HR, select the call and click the red X ( ).

Skype & Email Links

The Call an Employee tool provides direct links to Skype™, email and other types of internet telephone applications.

Contact Information:

#	Type	Phone/Email
	Primary	250-931-2239
	Secondary	604-220-2032
	Primary	laabjerg@cvccl.bc.ca

To initiate a Skype call to the employee, click the Skype icon ( ) to the left of the phone number you wish to call. Note that you must have already installed Skype and have either a subscription or credits.

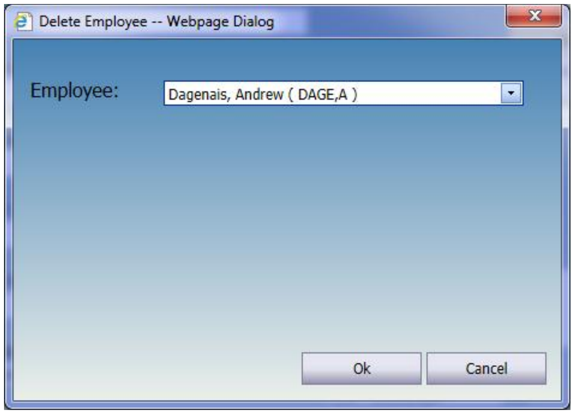
To email the employee, click the email icon ( ). A new email, using your default Mail provider, will be displayed with the employee's email address displayed in the **To** field.

To place a call using another provider, click the green telephone icon ( ) to the left of the phone number to be called. As long as the provider is set as the default for **callto** links, the call will be placed automatically.

5.6 Delete Employee

The Delete Employee tool in HR allows employees that have a status of Terminated to be removed from the system. Prior to deleting terminated employees, ensure that all appropriate processes are complete in Payroll and/or Scheduling, and that back-ups or hard copies of any critical information have been stored in a safe place.

Users that have "Delete" level security for Employee Information can delete terminated employees.

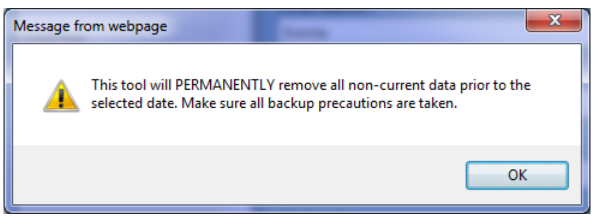


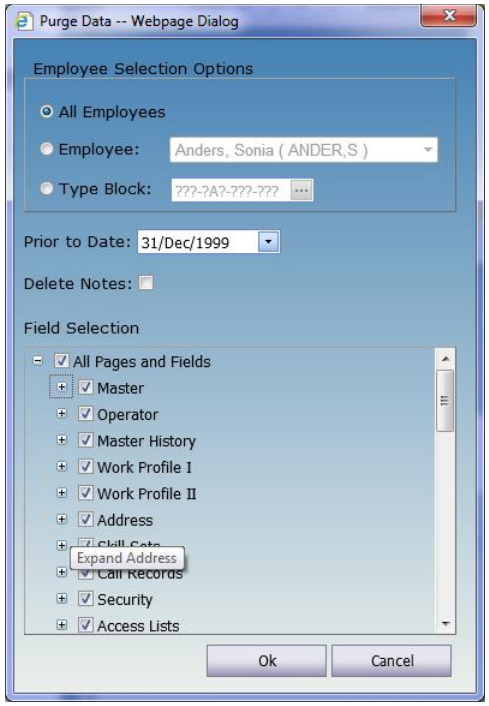
5.7 Purge Employee Data

The **Purge Employee Data** tool is used to permanently remove all or selected non-current employee data. The current values for each field on a page **will not be deleted**, even if the date is prior to the **Prior to Date** in the Data Purge dialog.

Prior to purging employee data, ensure that back-ups or hard copies of any critical information have been stored in a safe place.

Users with Delete level authority for **HR Data Purge** can remove old HR data for all or selected employees in their Employee List(s).



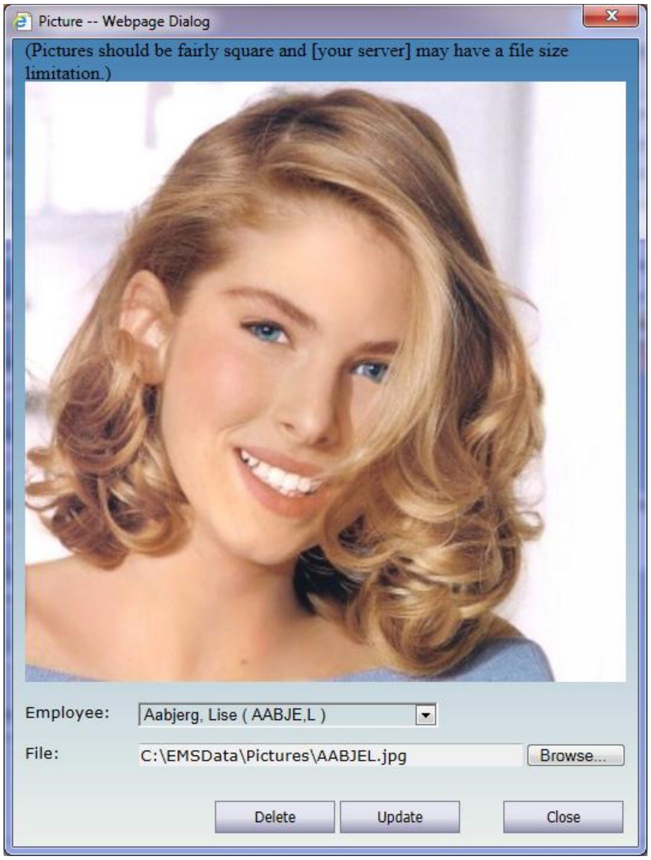


Field Name	Description/Usage
Employee Selection Options	The employee(s) with data to be purged.
Prior to Date	The date prior to (not including) which data in the selected pages will be removed. To maintain integrity, "current" data will not be purged regardless of its effective date.
Delete Notes	A flag indicating whether or not Page Notes on the selected pages should be deleted. Only notes dated prior to the date indicated will be deleted.
Field Selection	A list of pages and fields to select for inclusion in the purge process. Uncheck **All Pages and Fields** to select individual pages and/or fields. Click the plus sign next to a page to choose specific fields on that page.

5.8 Edit Pictures

Use the Edit Pictures tool in HR to add or update an employee's picture. The picture will be displayed on the Master page in HR and, optionally on the Profiles Report as well.

Users must have Modify (or higher) access to HR Pictures to modify an employee's picture.



To add or change an employee's picture:

On any HR page, select the employee.

Click Tools | Edit Pictures.

Click the Browse... button and locate the employee's image file.

Once the image is loaded in the dialog, click the Update button to apply it.

Click the **Close** button to complete the process.

To remove an employee's picture:

On any HR page, select the employee.

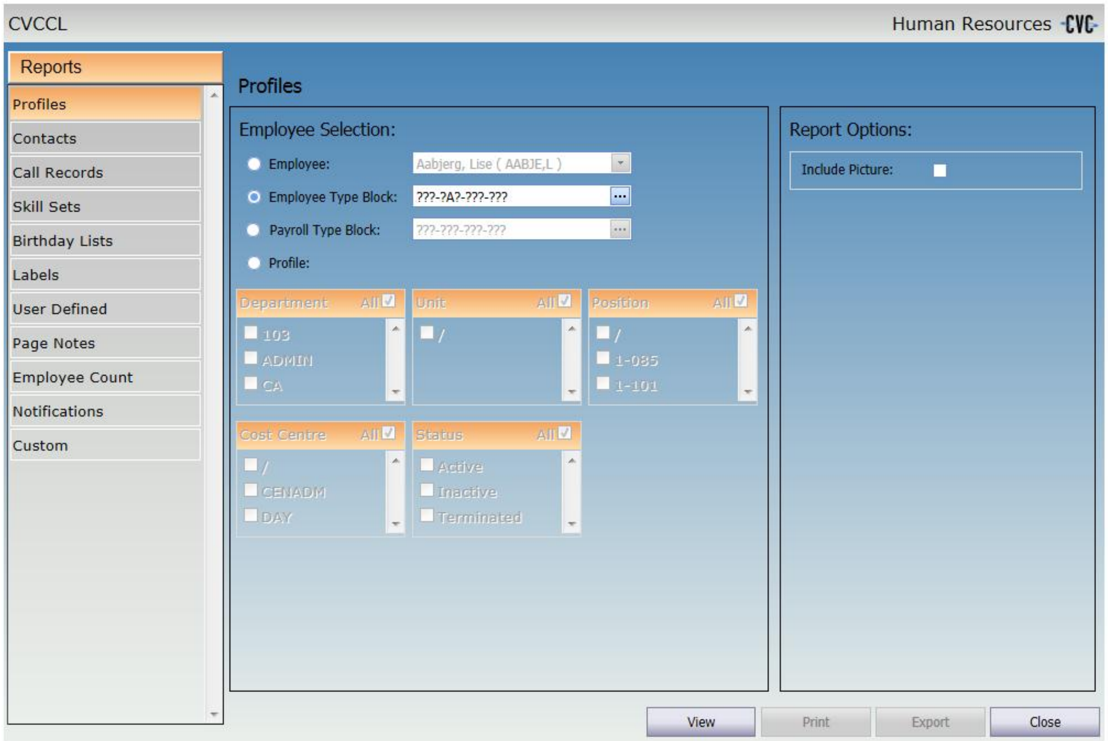
Click Tools | Edit Pictures.

Click the Delete button.

Once the image is cleared in the dialog, click the Close button to complete the process.

6 REPORTS

Pre-defined and custom reports are accessed through the Reports menu in HR. The reports can be viewed on screen, printed to a PDF, or exported to a variety of formats.



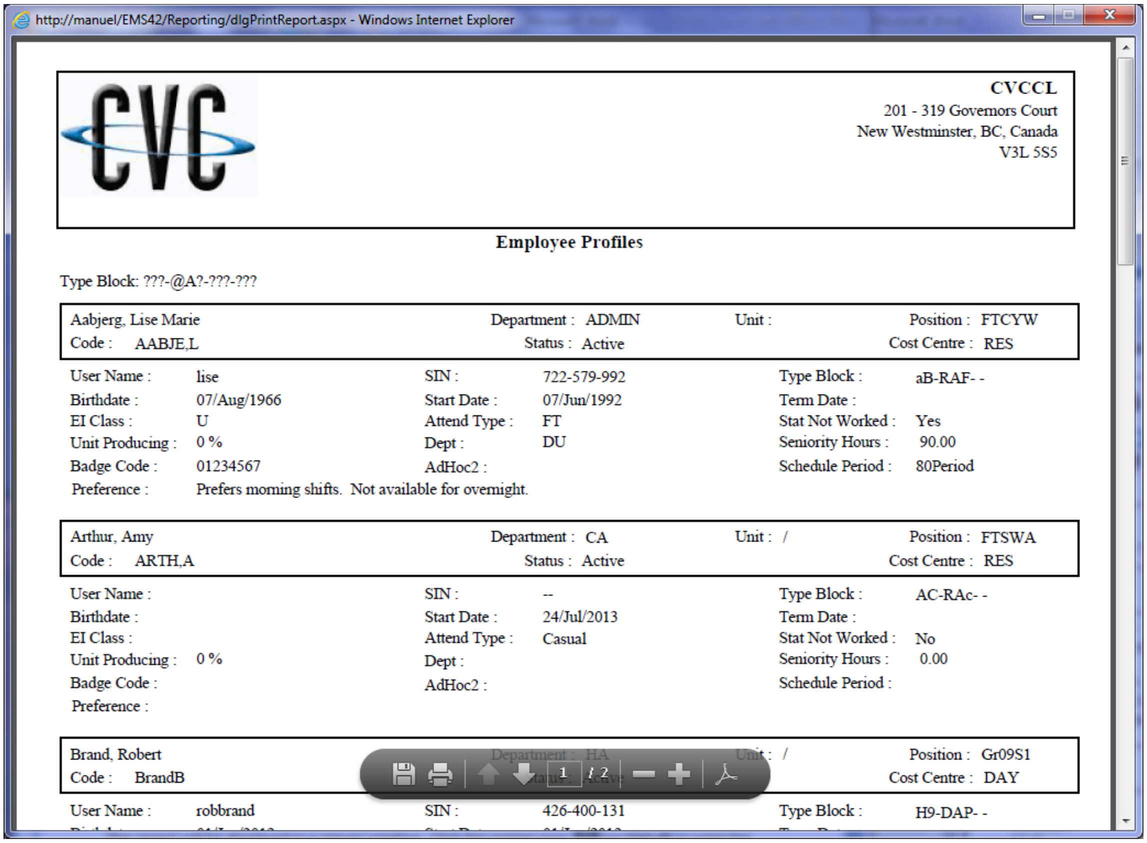
6.1 Printing Reports

To print a report:

Click the **Reports** menu and select a report.

Select the criteria.

Click the **View** button to display the report and then click the **Print** button.



The report will be displayed in a viewer window. Click the printer icon (or **Ctrl+P)** to print the report. Alternatively, click the disk icon (or **Shift+Ctrl+S**) to save a copy of the report as a pdf.

6.2 Exporting Reports

To export a report:

Click the **Reports** menu and select a report.

Select the criteria.

Click the **View** button to display the report and then click the **Export** button.

In the Export Report dialog that is displayed, select the appropriate format from the dropdown:

- MS Excel (XLS)
- MS Word (DOC)
- Portable Document (PDF)
- Rich Text (RTF)
- MS Excel – Data Only (XLS)
- XML File – Data Only (XML)

Click **Export** and choose an appropriate folder and name and click OK to save the file.

Click the **Cancel** or Close button to close the Export Report dialog.

6.3 Profiles Report

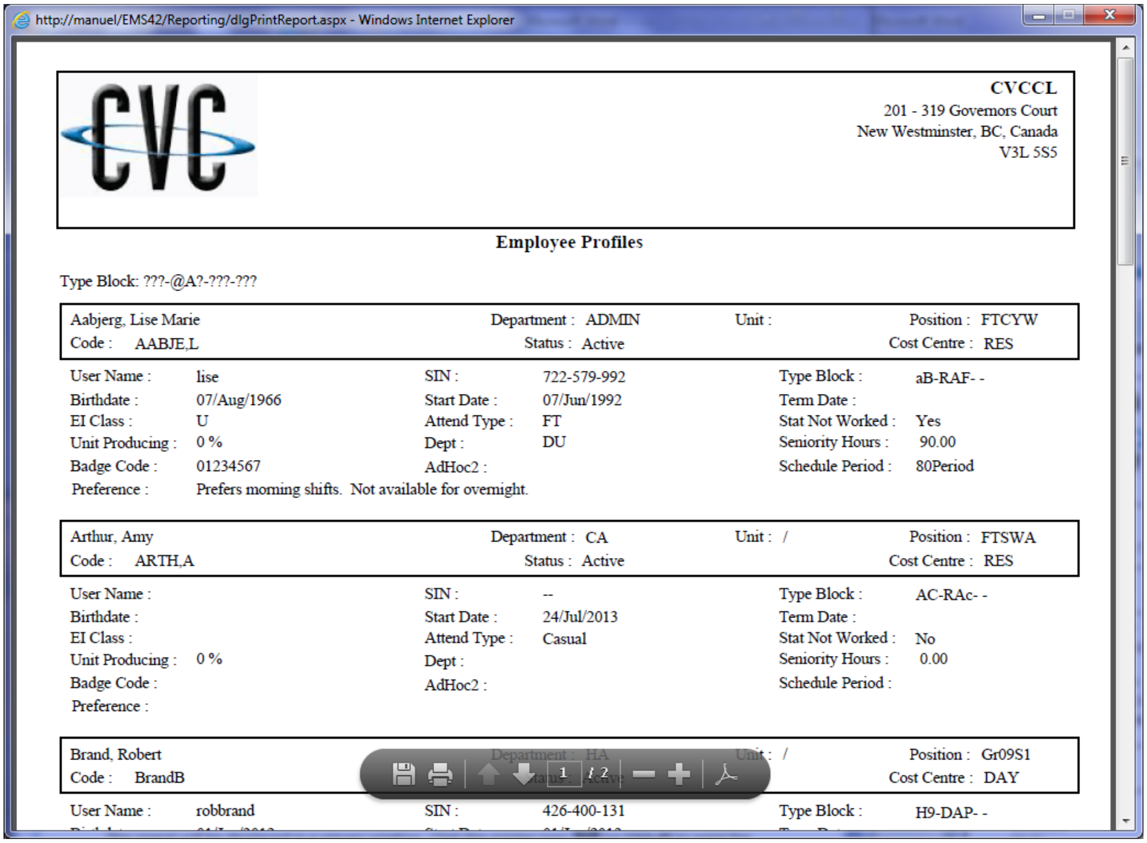
To print a list of Employee work profiles go to **Reports** | **Profiles**.

The Profile report can be printed for one employee or a selection of employees based on the **Employee Type Block** or the **Payroll Type Block**.

The report can also be printed for employees in specific **Departments**, **Units**, **Positions, Cost Centres** or **Statuses** by clicking **Profile** and selecting the desired codes.

To include the employee pictures, check the **Include Picture** box under Report Options.

To print the report, click the **View** button. The report will initially be displayed in a Crystal Reports dialog – you can review it prior to printing or exporting.



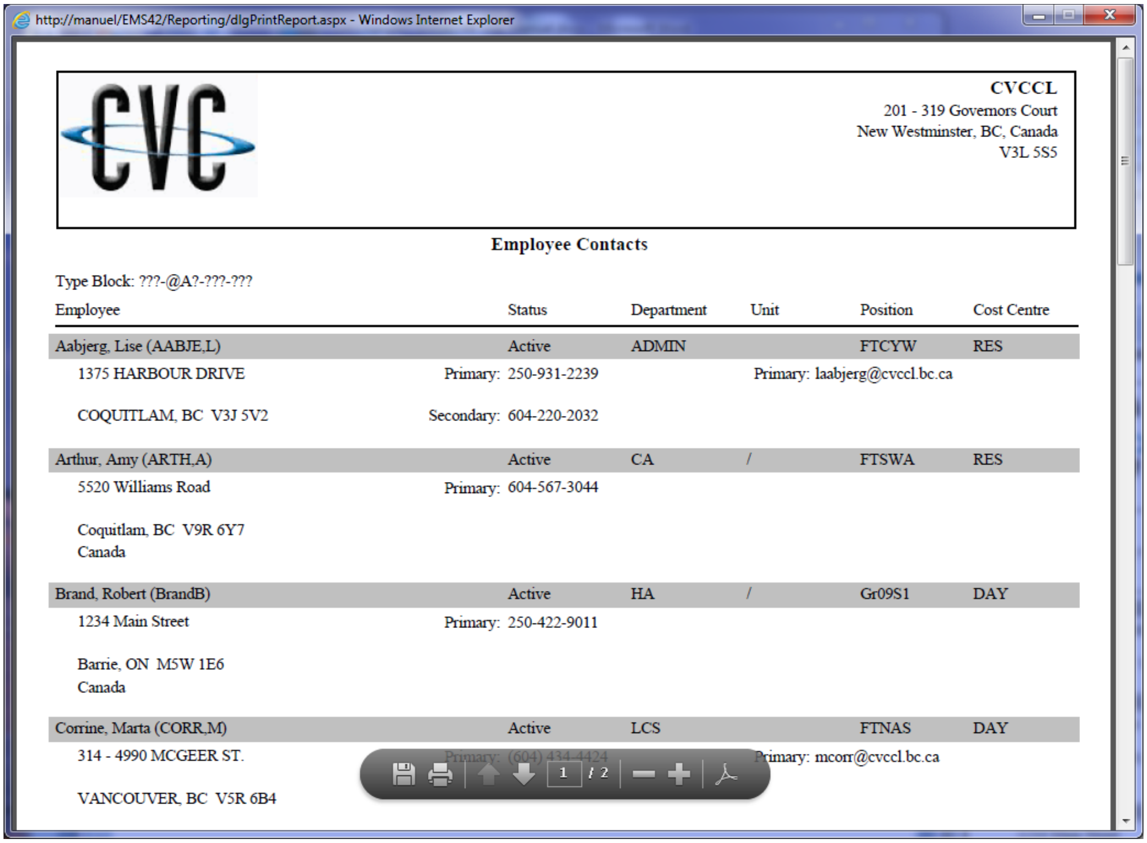
6.4 Contacts

To print a list of Employee addresses, phone numbers and email addresses, go to **Reports** | **Contacts**.

The Contacts report can be printed for one employee or a selection of employees based on the **Employee Type Block** or the **Payroll Type Block**.

The report can also be printed for employees in specific **Departments**, **Units**, **Positions, Cost Centres** or **Statuses** by clicking **Profile** and selecting the desired codes.

To print the report, click the **View** button. The report will initially be displayed in a Crystal Reports dialog – you can review it prior to printing or exporting.



6.5 Call Records

To print a list of recorded calls, go to **Reports | Call Records**.

The Call Records report can be printed for one employee or a selection of employees based on the **Employee Type Block** or the **Payroll Type Block**.

The report can also be printed for employees in specific **Departments**, **Units**, **Positions, Cost Centres** or **Statuses** by clicking **Profile** and selecting the desired codes.

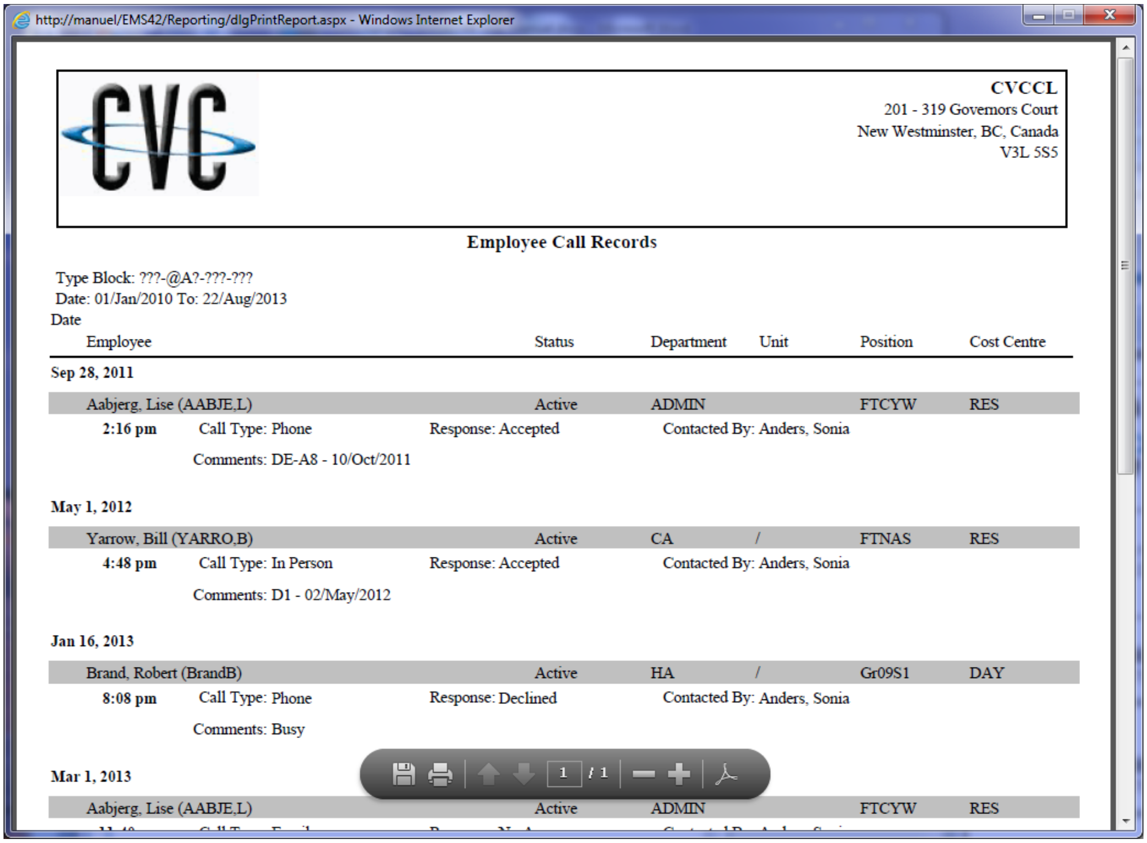
The report options include:

A range of dates

One or more Call Types

One or more Responses

To print the report, click the **View** button. The report will initially be displayed in a Crystal Reports dialog – you can review it prior to printing or exporting.



6.6 Skill Sets

To print a list of employees' skill sets, go to **Reports** | **Skill Sets**.

The Skill Sets report can be printed for one employee or a selection of employees based on the **Employee Type Block** or the **Payroll Type Block**.

The report can also be printed for employees in specific **Departments**, **Units**, **Positions, Cost Centres** or **Statuses** by clicking **Profile** and selecting the desired codes.

The report options include:

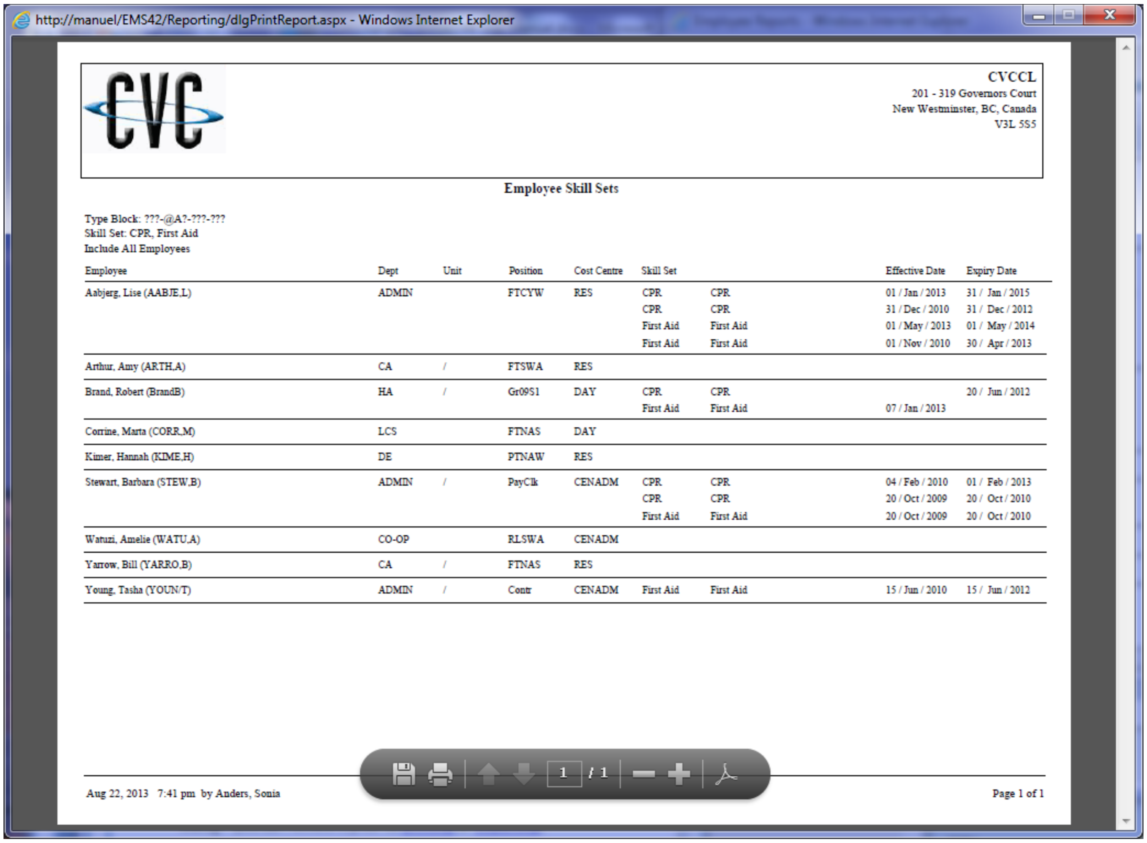
Skills that expire after a specific date

Skills that expire before a specific date

Employees that do not have the selected Skill Sets (to identify areas of opportunity)

One or more Skill Sets

To print the report, click the **View** button. The report will initially be displayed in a Crystal Reports dialog – you can review it prior to printing or exporting.


http://manuel/EMS42/Reporting/dlgPrintReport.aspx - Windows Internet Explorer

CVCCL
201 - 319 Governors Court
New Westminster, BC, Canada
V3L 5S5

Employee Skill Sets

Type Block: ???-@A?-???-???
Skill Set: CPR, First Aid
Include All Employees

Employee	Dept	Unit	Position	Cost Centre	Skill Set		Effective Date	Expiry Date
Aabjerg, Lise (AABJE,L)	ADMIN		FTCYW	RES	CPR	CPR	01 / Jan / 2013	31 / Jan / 2015
					CPR	CPR	31 / Dec / 2010	31 / Dec / 2012
					First Aid	First Aid	01 / May / 2013	01 / May / 2014
					First Aid	First Aid	01 / Nov / 2010	30 / Apr / 2013
Arthur, Amy (ARTH,A)	CA	/	FTSWA	RES				
Brand, Robert (BrandB)	HA	/	Gr09S1	DAY	CPR	CPR		20 / Jun / 2012
					First Aid	First Aid	07 / Jan / 2013	
Corrine, Marta (CORR,M)	LCS		FTNAS	DAY				
Kimer, Hannah (KIME,H)	DE		PTNAW	RES				
Stewart, Barbara (STEW,B)	ADMIN	/	PayClk	CENADM	CPR	CPR	04 / Feb / 2010	01 / Feb / 2013
					CPR	CPR	20 / Oct / 2009	20 / Oct / 2010
					First Aid	First Aid	20 / Oct / 2009	20 / Oct / 2010
Watuzi, Amelie (WATU,A)	CO-OP		RLSWA	CENADM				
Yarrow, Bill (YARRO,B)	CA	/	FTNAS	RES				
Young, Tasha (YOUN/T)	ADMIN	/	Contr	CENADM	First Aid	First Aid	15 / Jun / 2010	15 / Jun / 2012

Aug 22, 2013 7:41 pm by Anders, Sonia

1 / 1

Page 1 of 1

6.7 Birthday Lists

To print a list of employees' birth dates, go to **Reports** | **Birthday Lists**.

The Birthday Lists report can be printed for one employee or a selection of employees based on the **Employee Type Block** or the **Payroll Type Block**.

The report can also be printed for employees in specific **Departments**, **Units**, **Positions, Cost Centres** or **Statuses** by clicking **Profile** and selecting the desired codes.

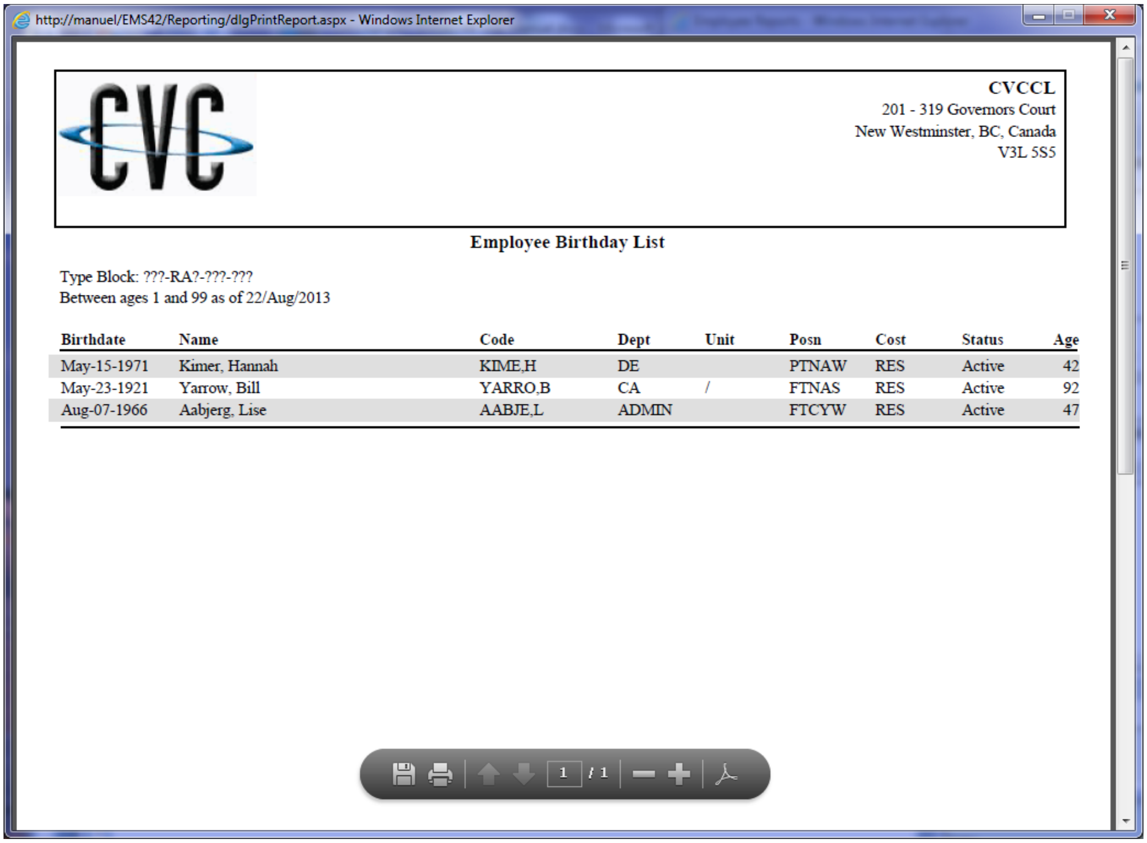
The report options include:

Birthdays during a specific month

Age range as of a specific date (Set the ages to 1 to 99 on the current date to view all birthdays)

Excluding the employee's age

To print the report, click the **View** button. The report will initially be displayed in a Crystal Reports dialog – you can review it prior to printing or exporting.


http://manuel/EMS42/Reporting/dlgPrintReport.aspx - Windows Internet Explorer

CVCCL
201 - 319 Governors Court
New Westminster, BC, Canada
V3L 5S5

Employee Birthday List

Type Block: ???-RA?-???-???
Between ages 1 and 99 as of 22/Aug/2013

Birthdate	Name	Code	Dept	Unit	Posn	Cost	Status	Age
May-15-1971	Kimer, Hannah	KIME,H	DE		PTNAW	RES	Active	42
May-23-1921	Yarrow, Bill	YARRO,B	CA	/	FTNAS	RES	Active	92
Aug-07-1966	Aabjerg, Lise	AABJE,L	ADMIN		FTCYW	RES	Active	47

1 / 1

6.8 Labels

To print mailing labels, go to **Reports | Labels**.

The mailing labels can be printed for one employee or a selection of employees based on the **Employee Type Block** or the **Payroll Type Block**.

The labels can also be printed for employees in specific **Departments**, **Units**, **Positions, Cost Centres** or **Statuses** by clicking **Profile** and selecting the desired codes.

To print the labels, click the **View** button. The labels will initially be displayed in a Crystal Reports dialog – you can review them prior to printing or exporting.

6.9 User Defined

To print a summary or detail list of selected user defined fields from an HR page, go to **Reports** | **User Defined**.

The User Defined report can be printed for one employee or a selection of employees based on the **Employee Type Block** or the **Payroll Type Block**.

The report can also be printed for employees in specific **Departments**, **Units**, **Positions, Cost Centres** or **Statuses** by clicking **Profile** and selecting the desired codes.

The report options include:

Sorting by Department

Range of Dates

The format can be

Summary by Employee, which lists all rows within the selected criteria by employee ,

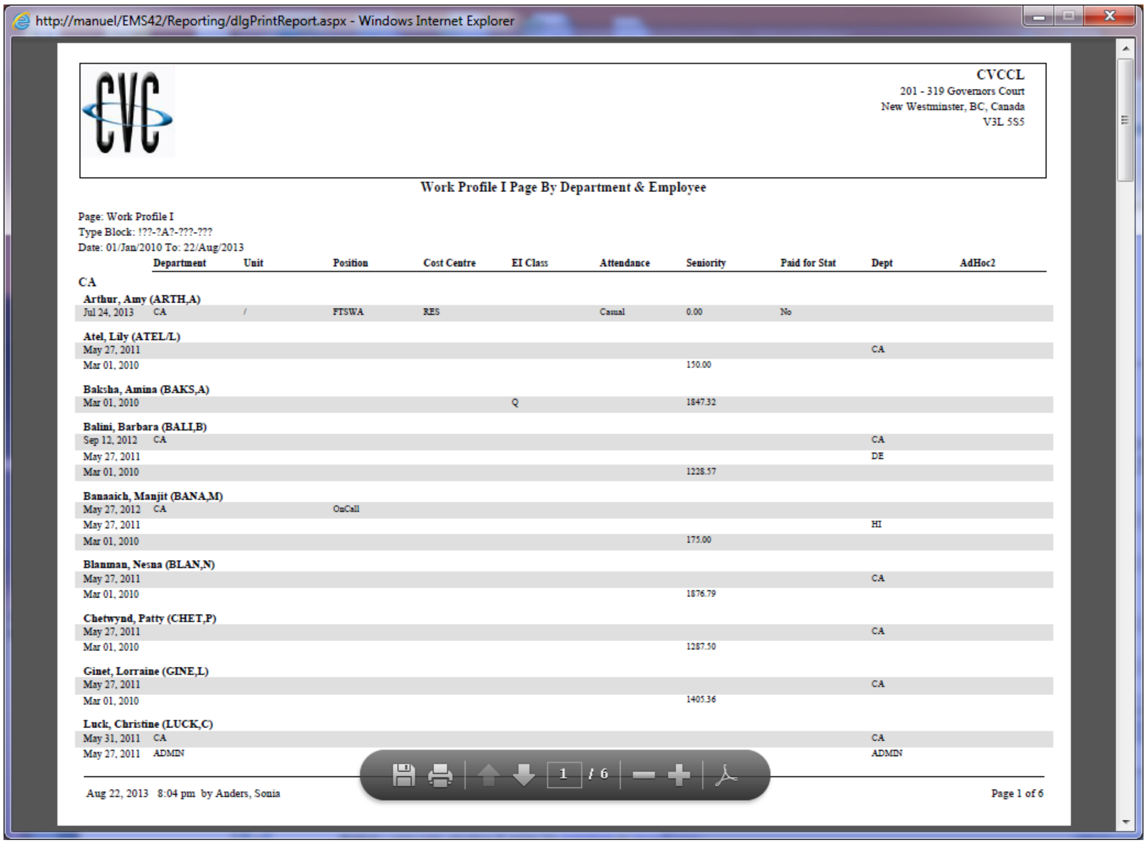
Summary by Date, which lists all rows within the selected criteria by date,

Detail, which prints the full detail of each row within the selected criteria ordered by employee, or

Detail Current Values Only, which prints a table listing each employee's current values for the selected fields.

The contents are **Page** specific and may include one to ten fields from the selected page.

To print the report, click the **View** button. The report will initially be displayed in a Crystal Reports dialog – you can review it prior to printing or exporting.



http://manuel/EMS42/Reporting/dlgPrintReport.aspx - Windows Internet Explorer

CVCCL
201 - 319 Governors Court
New Westminster, BC, Canada
V3L 5S5

Work Profile I Page By Department & Employee

Page: Work Profile I
Type Block: !??-?A?-???-???
Date: 01/Jan/2010 To: 22/Aug/2013

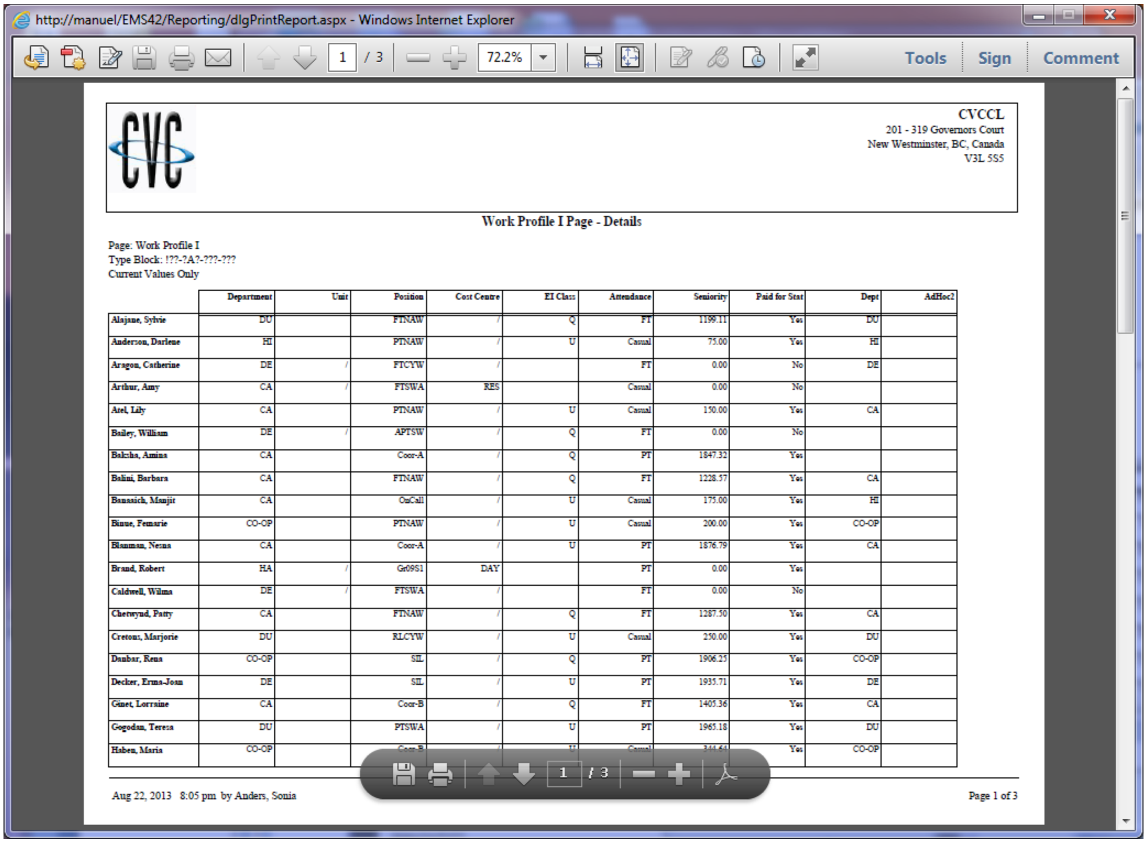
	Department	Unit	Position	Cost Centre	EI Class	Attendance	Seniority	Paid for Stat	Dept	AdHoc2
CA										
Arthur, Amy (ARTH,A)										
Jul 24, 2013	CA	/	FTSWA	RES		Casual	0.00	No		
Atel, Lily (ATEL/L)										
May 27, 2011									CA	
Mar 01, 2010							150.00			
Baksha, Amina (BAKS,A)										
Mar 01, 2010					Q		1847.32			
Balini, Barbara (BALI,B)										
Sep 12, 2012	CA								CA	
May 27, 2011									DE	
Mar 01, 2010							1228.57			
Banaaich, Manjit (BANA,M)										
May 27, 2012	CA		OnCall							
May 27, 2011									HI	
Mar 01, 2010							175.00			
Blanman, Nesna (BLAN,N)										
May 27, 2011									CA	
Mar 01, 2010							1876.79			
Chetwynd, Patty (CHET,P)										
May 27, 2011									CA	
Mar 01, 2010							1287.50			
Ginet, Lorraine (GINE,L)										
May 27, 2011									CA	
Mar 01, 2010							1405.36			
Luck, Christine (LUCK,C)										
May 31, 2011	CA								CA	
May 27, 2011	ADMIN								ADMIN	

Aug 22, 2013 8:04 pm by Anders, Sonia

1 / 6

Page 1 of 6

Summary by Employee with Sort by Department



http://manuel/EMS42/Reporting/dlgPrintReport.aspx - Windows Internet Explorer

CVCCL
201 - 319 Governors Court
New Westminster, BC, Canada
V3L 5S5

Work Profile I Page - Details

Page: Work Profile I
Type Block: !??-?A?-???-???
Current Values Only

	Department	Unit	Position	Cost Centre	EI Class	Attendance	Seniority	Paid for Stat	Dept	AdHoc2
Alajane, Sylvie	DU		FTNAW	/	Q	FT	1199.11	Yes	DU	
Anderson, Darlene	HI		PTNAW	/	U	Casual	75.00	Yes	HI	
Aragon, Catherine	DE	/	FTCYW	/		FT	0.00	No	DE	
Arthur, Amy	CA	/	FTSWA	RES		Casual	0.00	No		
Atel, Lily	CA		PTNAW	/	U	Casual	150.00	Yes	CA	
Bailey, William	DE	/	APTSW	/	Q	FT	0.00	No		
Baksha, Amina	CA		Coor-A	/	Q	PT	1847.32	Yes		
Balini, Barbara	CA		FTNAW	/	Q	FT	1228.57	Yes	CA	
Banasich, Manjit	CA		OnCall	/	U	Casual	175.00	Yes	HI	
Binue, Femarie	CO-OP		PTNAW	/	U	Casual	200.00	Yes	CO-OP	
Blanman, Nesna	CA		Coor-A	/	U	PT	1876.79	Yes	CA	
Brand, Robert	HA	/	Gr09S1	DAY		PT	0.00	Yes		
Caldwell, Wilma	DE	/	FTSWA	/		FT	0.00	No		
Chetwynd, Patty	CA		FTNAW	/	Q	FT	1287.50	Yes	CA	
Cretons, Marjorie	DU		RLCYW	/	U	Casual	250.00	Yes	DU	
Dunbar, Rena	CO-OP		SIL	/	Q	PT	1906.25	Yes	CO-OP	
Decker, Erma-Joan	DE		SIL	/	U	PT	1935.71	Yes	DE	
Ginet, Lorraine	CA		Coor-B	/	Q	FT	1405.36	Yes	CA	
Gogodan, Teresa	DU		PTSWA	/	U	PT	1965.18	Yes	DU	
Haben, Maria	CO-OP		Coor-B	/	U	Casual	344.64	Yes	CO-OP	

Aug 22, 2013 8:05 pm by Anders, Sonia

Page 1 of 3

Current Values Only Report of the Work Profile I page

6.10 Page Notes

To print a list of page notes for one or all pages, go to **Reports** | **Page Notes**.

The Page Notes report can be printed for one employee or a selection of employees based on the **Employee Type Block** or the **Payroll Type Block**.

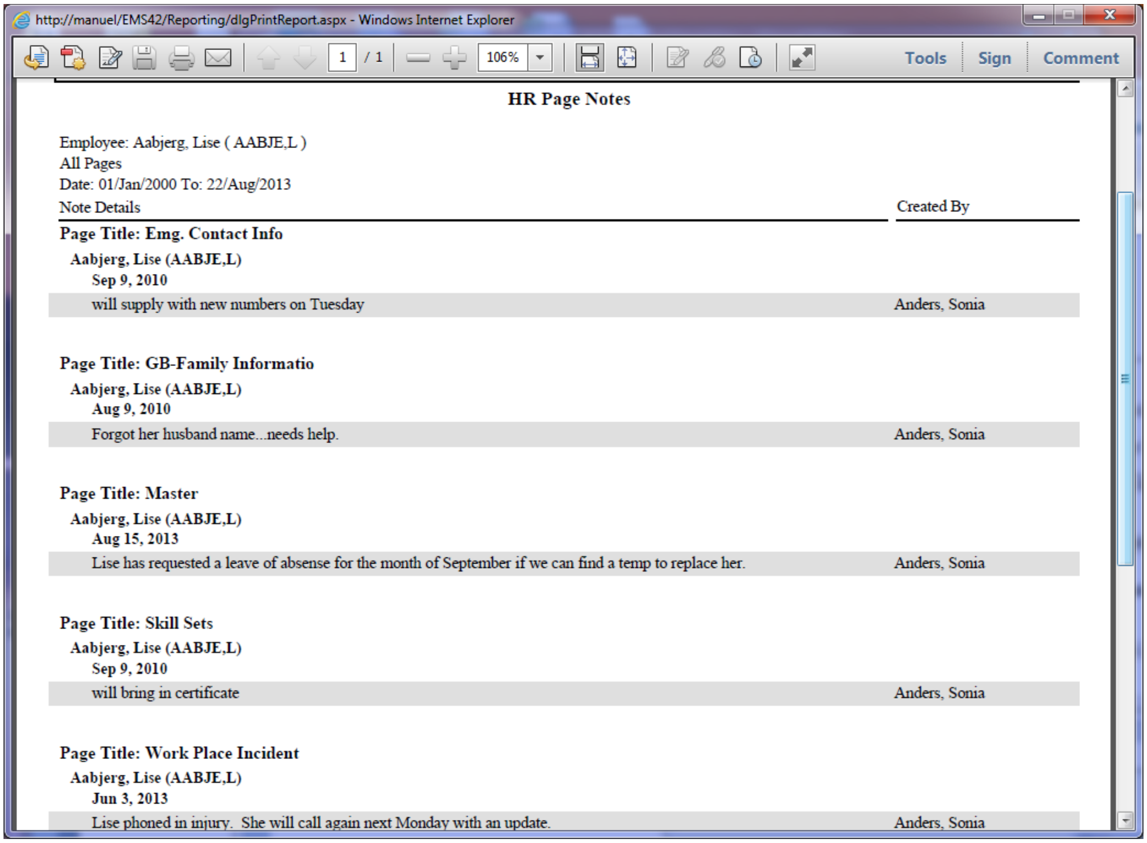
The report can also be printed for employees in specific **Departments**, **Units**, **Positions, Cost Centres** or **Statuses** by clicking **Profile** and selecting the desired codes.

The report options include:

A range of dates

All or a specific HR page

To print the report, click the **View** button. The report will initially be displayed in a Crystal Reports dialog – you can review it prior to printing or exporting.



HR Page Notes

Employee: Aabjerg, Lise (AABJE,L)
All Pages
Date: 01/Jan/2000 To: 22/Aug/2013

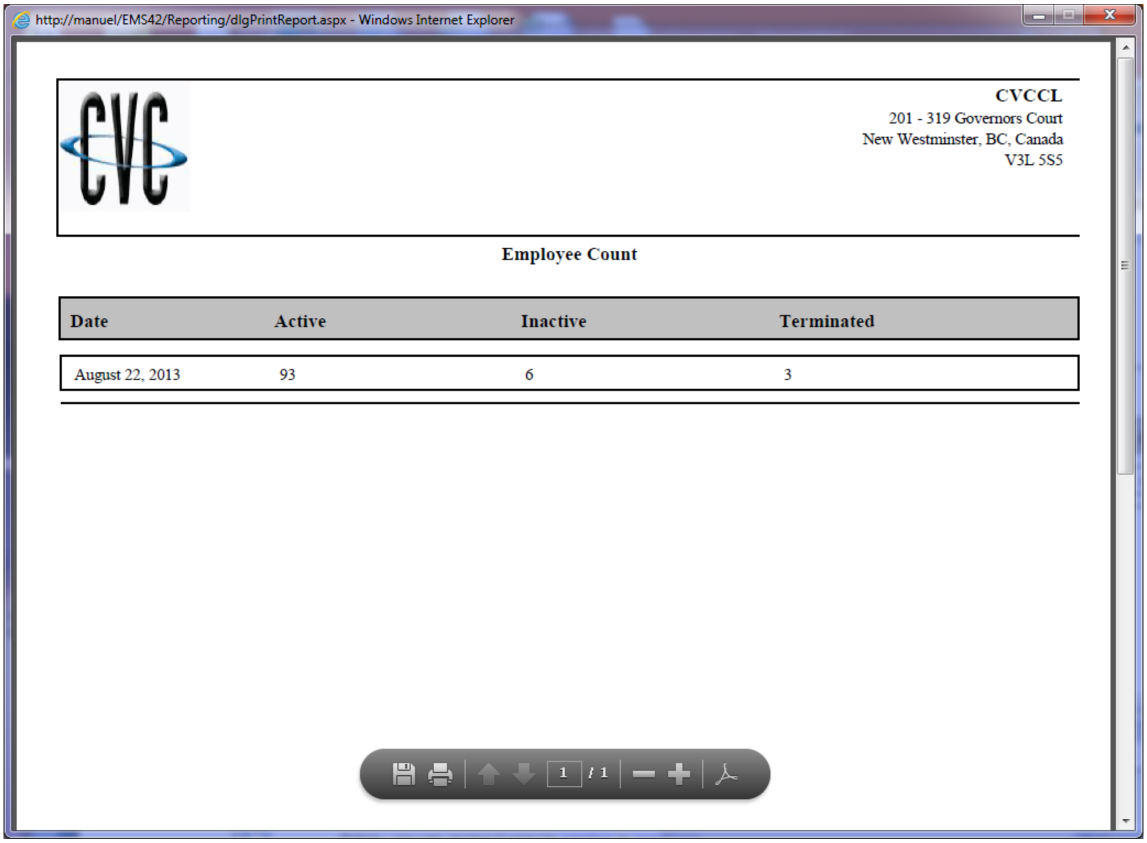
Note Details	Created By
Page Title: Emg. Contact Info	
Aabjerg, Lise (AABJE,L)	
Sep 9, 2010	
will supply with new numbers on Tuesday	Anders, Sonia
Page Title: GB-Family Informatio	
Aabjerg, Lise (AABJE,L)	
Aug 9, 2010	
Forgot her husband name...needs help.	Anders, Sonia
Page Title: Master	
Aabjerg, Lise (AABJE,L)	
Aug 15, 2013	
Lise has requested a leave of absense for the month of September if we can find a temp to replace her.	Anders, Sonia
Page Title: Skill Sets	
Aabjerg, Lise (AABJE,L)	
Sep 9, 2010	
will bring in certificate	Anders, Sonia
Page Title: Work Place Incident	
Aabjerg, Lise (AABJE,L)	
Jun 3, 2013	
Lise phoned in injury. She will call again next Monday with an update.	Anders, Sonia

6.11 Employee Count

To print the number of active, inactive and terminated employees in HR, go to **Reports** | **Employee Count**. The Employee Count report will assist with identifying the appropriate licensing level for the organization.

The Employee Count report does not require any criteria.

To print the report, click the **View** button. The report will initially be displayed in a Crystal Reports dialog – you can review it prior to printing or exporting.



6.12 Notifications

To print a summary or detail list of notifications, go to **Reports** | **Notifications**.

The Notifications report can be printed for one employee or a selection of employees based on the **Employee Type Block** or the **Payroll Type Block**.

The report can also be printed for employees in specific **Departments**, **Units**, **Positions, Cost Centres** or **Statuses** by clicking **Profile** and selecting the desired codes.

The report options include:

Range of Dates

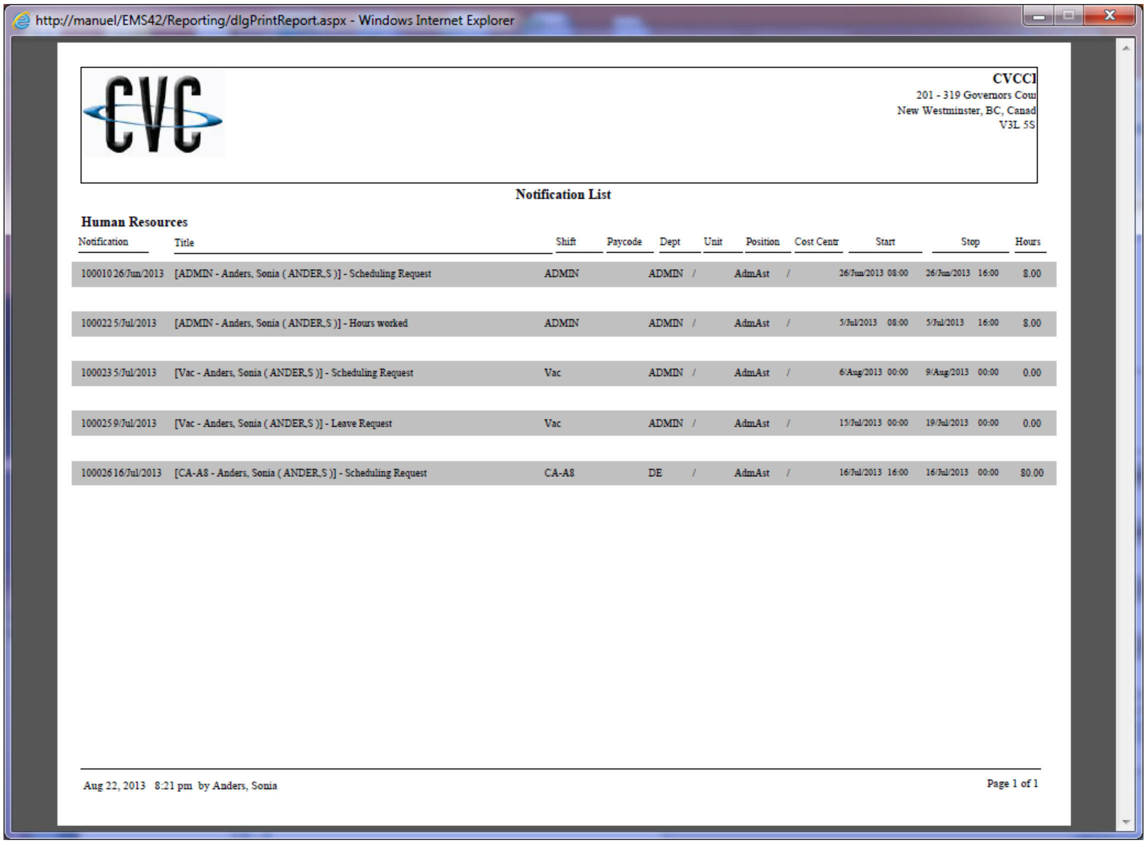
All or a specific **Type** of notifications

The format can be

Detail, which lists all notifications within the selected criteria, including the history, or

Summary, which lists each notification on one row within the selected criteria by notification id.

To print the report, click the **View** button. The report will initially be displayed in a Crystal Reports dialog – you can review it prior to printing or exporting.



CVCCI
201 - 319 Governors Cou
New Westminster, BC, Canad
V3L 5S

Notification List

Human Resources

Notification	Title	Shift	Paycode	Dept	Unit	Position	Cost Centr	Start	Stop	Hours
100010 26/Jun/2013	[ADMIN - Anders, Sonia (ANDER,S)] - Scheduling Request	ADMIN		ADMIN /		AdmAst /		26/Jun/2013 08:00	26/Jun/2013 16:00	8.00
100022 5/Jul/2013	[ADMIN - Anders, Sonia (ANDER,S)] - Hours worked	ADMIN		ADMIN /		AdmAst /		5/Jul/2013 08:00	5/Jul/2013 16:00	8.00
100023 5/Jul/2013	[Vac - Anders, Sonia (ANDER,S)] - Scheduling Request	Vac		ADMIN /		AdmAst /		6/Aug/2013 00:00	9/Aug/2013 00:00	0.00
100025 9/Jul/2013	[Vac - Anders, Sonia (ANDER,S)] - Leave Request	Vac		ADMIN /		AdmAst /		15/Jul/2013 00:00	19/Jul/2013 00:00	0.00
100026 16/Jul/2013	[CA-A8 - Anders, Sonia (ANDER,S)] - Scheduling Request	CA-A8		DE /		AdmAst /		16/Jul/2013 16:00	16/Jul/2013 00:00	80.00

Aug 22, 2013 8:21 pm by Anders, Sonia

Page 1 of 1

6.13 Custom

To print a custom report, go to **Reports** | **Custom**. Custom reports are normally developed for a specific site and have varying levels of criteria depending on the complexity of the report.

For more information on custom reports development, contact the Helpdesk.