



Microsoft Dynamics™ GP
Human Resources Sample Reports

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Human Resources sample reports

This document includes information about and instructions for creating the most common Human Resources reports. Samples of each report also are included.

The following reports are explained:

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- [Attendance Detail by Employee](#)
- [Benefit Dependents](#)
- [Compensation Summary](#)
- [Enrollment by Employee](#)
- [EEO-1 Summary and Detail](#)
- [Employee List](#)
- [Employee Summary](#)
- [Vets-100](#)
- [OSHA 301](#)
- [Full Time Equivalency \(FTE\) Headcount with Employees](#)
- [Employee Orientation Checklist - Detail](#)
- [Requisition List](#)
- [Reviews Due Date](#)
- [Skills Expiration](#)
- [Turnover Periods Analysis](#)
- [Turnover Rate by Department](#)

Applicant List

Report Writer name

Applicant List

Report tables

HR_Applicant

HRP_Multi_Division

HRP_Multi_Department

HRP_Multi_Position

Ranges

Apply Date

Color Code

Company

Department

Division

First Name

Last Name

Position

Referral Source

Social Security Number

Status

Sorting options

Social Security Number

Last Name

Date

Company

Status

Color Code

Referral Source

The Applicant List report contains all the applicants with the company. The report also contains the company, division, department, and position for which the applicant has applied.

Printing Instructions

1. Choose Reports >> Human Resources >> Applicant >> Report Options to open the Applicant Report Options window.
2. Enter an option name, select the Applicant List report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Applicant Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Applicant List

Applicant List

Co./Div./Dept./Pos.	Status	Apply Date
Price, Jeff James Fabrikam, Inc. / / Administration / Administrative Assistant	Open	4/4/2005
Wood, John Daniel Fabrikam, Inc. / / Administration / Accounting Clerk	Active	8/13/2004
Smith, Denise Michele Fabrikam, Inc. / / Administration / Accounting Clerk	Hired	11/1/2005
Walton, Bryan J Fabrikam, Inc. / / Administration / Administrative Assistant	Hired	11/1/2005

Printed by: sa
Report: Applicant List

1

Attendance Detail by Employee

Report Writer name

TA Attendance Detail by
Employee

Report tables

TA_TRX_Detail
TA_Setup_Types
Payroll Master - HR Alias
Payroll Master
HR_Division_Access
HR_Department_Access
HR_Division2
Payroll Department Setup -
HR Alias

Ranges

Department
Division
Time Card
Employee ID
First Name
Last Name
Social Security Number
Date

Sorting options

Employee ID
Divison...Employee ID

Include

Inactive Employees

The Attendance Detail by Employee report shows how many hours of sick time or vacation time an employee has accrued for use during a specified period of time, and how many hours of sick time or vacation time the employee has used during that period. The report also shows the employee's ID number, department, and division.

Printing Instructions

1. Choose Reports >> Human Resources >> Attendance >> Report Options to open the Attendance Report Options window.
2. Enter an option name, select the Attendance Detail report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Attendance Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Attendance Detail by Employee

Attendance Detail by Employee

*=Inactive Employee

Ackerman, Pilar Emp ID: ACKE0001 Div/Dept: Main/Support Services						
TRX	Time Code	Description	Status	Start Date	End Date	Hours
6	HOURLY	Hourly Time	Posted	4/12/2007	4/26/2007	80.00
Barbariol, Angela Emp ID: BARB0001 Div/Dept: Main/Installation						
TRX	Time Code	Description	Status	Start Date	End Date	Hours
5	HOLI	Holiday	Posted	4/12/2007	4/26/2007	20.00
7	HOURLY	Hourly Time	Posted	4/12/2007	4/26/2007	60.00
Barr, Adam Emp ID: BARR0001 Div/Dept: Main/Installation						
TRX	Time Code	Description	Status	Start Date	End Date	Hours
13	HOURLY	Hourly Time	Posted	4/12/2007	4/26/2007	76.00
14	SICK2	Sick time with pay	Posted	4/12/2007	4/12/2007	4.00
Diaz, Brenda Emp ID: DIAZ0001 Div/Dept: Main/Installation						
TRX	Time Code	Description	Status	Start Date	End Date	Hours
1	HOURLY	Hourly Time	Posted	4/12/2007	4/26/2007	80.00
Harui, Roger Emp ID: HARU0001 Div/Dept: Main/Installation						
TRX	Time Code	Description	Status	Start Date	End Date	Hours
10	HOURLY	Hourly Time	Posted	4/12/2007	4/26/2007	80.00
Kahn, Wendy Beth Emp ID: KAHN0001 Div/Dept: Main/Purchasing/Receiving						
TRX	Time Code	Description	Status	Start Date	End Date	Hours
11	HOURLY	Hourly Time	Posted	4/12/2007	4/26/2007	80.00
Tiano, Mike Emp ID: TIAN0001 Div/Dept: Main/Installation						
TRX	Time Code	Description	Status	Start Date	End Date	Hours
12	HOURLY	Hourly Time	Posted	4/12/2007	4/26/2007	80.00

Printed By: sa
 Report: TA Attendance Detail by Employee

1

Benefit Dependents

Report Writer name

Benefit Dependents

Report tables

Payroll Master Dependent -
HR Alias

Payroll Master - HR Alias

HR_Department_Access

HR_Division_Access

Ranges

Employee ID

Department

Division

First Name

Last Name

Position

Social Security Number

Sorting option

Employee ID

Include

Inactive Employees

The Benefit Dependents report lists the dependents of each employee, their relationship to the employees, their dates of birth, and their Social Security numbers.

Printing Instructions

1. Choose Reports >> Human Resources >> Benefits >> Report Options to open the Benefit Report Options window.
2. Enter an option name, select the Benefit Dependents report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Benefit Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Benefit Dependents

11/7/2005

3:36:15 PM

Benefit Dependents

*=Inactive Employee

Dependents		Relationship	DOB	Soc Sec Number
Denise Michele Smith				
Denise	Smith	Self	3/11/1952	000-00-0003
Pilar Ackerman				
Josh	Barnhill	Spouse	12/31/1977	000-56-5622
Jay	Adams	Child	1/15/2003	- -
Pilar	Ackerman	Self	11/24/1978	917-23-9833
Angela Barbariol				
Bryan	Baker		0/0/0000	- -
Angela	Barbariol	Self	1/15/1955	986-22-5953
Adam Barr				
Adam	Barr	Self	10/7/1966	944-22-9198
Luis Bonifaz				
Stephanie	Conroy	Spouse	1/12/1965	000-76-2378
Luis	Bonifaz	Self	7/13/1957	982-58-1991
Nancy Buchanan				
Nancy	Buchanan	Self	7/6/1968	816-93-2541
John Y. Chen				
John	Chen	Self	4/15/1960	000-92-2390
Jane Clayton				
Jim	Geist	Spouse	5/3/1962	900-83-2900
John	Evans	Child	12/1/1985	- -
Jay	Fluegel	Child	6/2/1990	- -
Jane	Clayton	Self	8/15/1964	944-56-3896
Aidan Delaney				
Aidan	Delaney	Self	4/3/1976	000-20-9416
Brenda Diaz				
Brenda	Diaz	Self	1/6/1974	484-66-9938

Printed by: sa
Report: Benefit Dependents

1

Compensation Summary

Report Writer name

Ben Compensation Summary

Report tables

HR_Benefit_MSTR

Payroll Master - HR Alias

Payroll Department Setup -
HR Alias

HR_Department_Access

HR_Division2

HR_Division_Access

Ranges

Employee ID

Benefit

Department

Division

First Name

Last Name

Position

Social Security Number

Sorting options

Employee ID

Benefit

Include

Inactive Employees

The Compensation Summary report lists the various benefits for each employee. A description of the benefit is provided, along with the benefit amount, cost, and contributions by employee and employer. A total of benefit items and total dollar amounts of benefits, costs, and contributions also are listed.

Printing Instructions

1. Choose Reports >> Human Resources >> Benefits >> Report Options to open the Benefit Report Options window.
2. Enter an option name, select the Compensation Summary report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Benefit Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Compensation Summary

Compensation Summary

*=Inactive Employee

* Pilar Ackerman	Emp ID: ACKE0001		Contributions	
Description	Benefit Amount	Cost	Employee	Employer
Retirement Plan	\$0.00	\$0.00	\$0.00	\$0.00
Employee Purchases	\$0.00	\$0.00	\$0.00	\$0.00
Insurance Premium	\$0.00	\$49.36	\$0.00	\$49.36
Insurance (family coverage)	\$0.00	\$72.95	\$72.95	\$0.00
Medical Flex	\$0.00	\$20.00	\$20.00	\$0.00
Total Benefit Items: 5	\$0.00	\$142.31	\$92.95	\$49.36

Angela Barbariol	Emp ID: BARB0001		Contributions	
Description	Benefit Amount	Cost	Employee	Employer
Retirement Plan	\$0.00	\$0.00	\$0.00	\$0.00
Employee Purchases	\$0.00	\$0.00	\$0.00	\$0.00
Insurance Premium	\$0.00	\$49.36	\$0.00	\$49.36
Medical Flex	\$0.00	\$5.00	\$5.00	\$0.00
Total Benefit Items: 4	\$0.00	\$54.36	\$5.00	\$49.36

Adam Barr	Emp ID: BARR0001		Contributions	
Description	Benefit Amount	Cost	Employee	Employer
Retirement Plan	\$0.00	\$0.00	\$0.00	\$0.00
Employee Purchases	\$0.00	\$0.00	\$0.00	\$0.00
Insurance Premium	\$0.00	\$49.36	\$0.00	\$49.36
Medical Flex	\$0.00	\$5.00	\$5.00	\$0.00
Total Benefit Items: 4	\$0.00	\$54.36	\$5.00	\$49.36

Luis Bonifaz	Emp ID: BONI0001		Contributions	
Description	Benefit Amount	Cost	Employee	Employer
Retirement Plan	\$0.00	\$0.00	\$0.00	\$0.00
Employee Purchases	\$0.00	\$0.00	\$0.00	\$0.00
Insurance Premium	\$0.00	\$49.36	\$0.00	\$49.36
Medical Flex	\$0.00	\$5.00	\$5.00	\$0.00
Total Benefit Items: 4	\$0.00	\$54.36	\$5.00	\$49.36

Printed by: LESSONUSER1
 Report: Ben Compensation Summary

Enrollment by Employee

Report Writer name

Benefit Enrollment by
Employee

Report tables

HR_Benefit_MSTR
Payroll Master - HR Alias
HR_Department_Access
HR_Division_Access
HR_Benefit_SETP

Ranges

Employee ID
Benefit
Department
Division
First Name
Last Name
Position
Social Security Number

Sorting options

Employee ID
Benefit

Include

Inactive Employees

The Enrollment by Employee report lists the current employee benefits each employee is enrolled in. The report includes the employee name, ID number, benefits, a description of the benefits, benefit amount, cost, and contributions by the employee and employer. The report also lists the total benefit items and total dollar amounts for benefit amount, cost, and contributions.

Printing Instructions

1. Choose Reports >> Human Resources >> Benefits >> Report Options to open the Benefit Report Options window.
2. Enter an option name, select the Enrollment by Employee report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Benefit Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Enrollment by Employee

Enrollment by Employee

*=Inactive Employee

Pilar Ackerman		Emp ID: ACKE0001		Contributions		
Benefit	Description	Benefit Amount	Cost	Employee	Employer	
401K	Retirement Plan	\$0.00	\$0.00	8.00%	5.00%	
EPU	Employee Purchases	\$0.00	\$0.00			
INS	Insurance Premium	\$0.00	\$49.36		\$49.36	
INS2	Insurance (family coverage)	\$0.00	\$72.95	\$72.95		
MED	Medical Flex	\$0.00	\$20.00	\$20.00		
Total Benefit Items: 5		[Not Fou	\$0.00	\$142.31	\$92.95	\$49.36

Printed by: LESSONUSER1
 Report: Benefit Enrollment by Employee

EEO-1 Summary and Detail

Report Writer name

EEO_1_Detail_V2

Report tables

Payroll Master - HR Alias

Payroll Master

HR_Departmant_Access

HR_Division_Access

Payroll Department Setup -
HR Alias

Payroll Position Setup - HR
Alias

HR_Division2

Payroll Address Master - HR
Alias

Ranges

Department

Division

The EEO-1 Summary and Detail reports classify by department, EEO class, and ethnic origin the name of each employee and his or her gender, and current position within the company. The reports also give the total number of employees in each EEO class and then divides the total into total males, total females, minority/female, and undeclared gender.

Printing Instructions

1. Choose Reports >> Human Resources >> EEO >> Report Options to open the EEO Report Options window.
2. Enter an option name, select a report name, such as the EEO 1 Headcount Detail report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The EEO Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

EEO-1 Detail

11/7/2005

5:57:58 PM

EEO-1 Detail

Company: Fabrikam, Inc.
Division: Main

Department: Accounting

EEO Class: N/A

Ethnic Origin: White

Name	Gender	Position
Delaney, Aidan	Male	Accounting Clerk
Doyle, Jenny	Female	Accounting Clerk
Levy, Steven B.	Male	Supervisor

Ethnic Origin: Asian or Pacific Islander

Name	Gender	Position
Nagata, Suanne	Female	Accounting Clerk

Total Employees In EEO Class:	4	Total Males:	2
		Total Females:	2
		Minority/Female:	2
		Undeclared Gender:	0

Printed By: sa
Report: EEO_1_Detail_V2

1

Employee List

Report Writer name

Employee List

Report tables

Payroll Master - HR Alias
Payroll Master
HR_Division_Access
HR_Department_Access
HR_Division2
Payroll Department Setup -
HR Alias
Payroll Position Setup - HR
Alias
Payroll Setup Supervisor
HR_Employee History*

Ranges

Department
Division
Date
Employee ID
First Name
Last Name
Position
Social Security Number
Type of Employment
Location

Sorting options

Employee ID
Social Security Number
Last Name
Division, Department
Supervisor
Location
Department
Position
Division...First Name

Include

Inactive Employees

The Employee List report lists the name of employees, their employee identification numbers, their supervisors, and their worksite locations. The total number of employees also is given.



To print this report with information from multiple companies, use the Human Resources Cross-Company window (Reports >> Human Resources >> Cross-Company). Select Employee List in the Reports list and List By Location in the Sub-reports list.

Printing Instructions

1. Choose Reports >> Human Resources >> Employee >> Report Options to open the Employment Report Options window.
2. Enter an option name, select the Employee List report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Employment Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Employee List

Employee Listing

*=Inactive Employee

Employee Name	Employee ID	Supervisor	Location
Smith, Denise Michele	0010023	Technician Manager	Fabrikam, Inc.
Ackerman, Pilar	ACKE0001	Support Manager	Fabrikam, Inc.
Barbariol, Angela	BARB0001	Technician Manager	Fabrikam, Inc.
Barr, Adam	BARR0001	Support Manager	Fabrikam, Inc.
Bonifaz, Luis	BONI0001	Technician Manager	Fabrikam, Inc.
Buchanan, Nancy	BUCH0001	Support Manager	Fabrikam, Inc.
Chen, John Y.	CHEN0001	Technician Manager	Fabrikam, Inc.
Clayton, Jane	CLAY0001	Support Manager	Fabrikam, Inc.
Delaney, Aidan	DELA0001	Technician Manager	Fabrikam, Inc.
Diaz, Brenda	DIAZ0001	Technician Manager	Fabrikam, Inc.
Doyle, Jenny	DOYL0001	Support Manager	Fabrikam, Inc.
Erickson, Gregory J.	ERIC0001	Support Manager	TWO, Inc. Wareh
Flood, Kathie	FLOO0001	Support Manager	TWO, Inc. Wareh
Harui, Roger	HARU0001	Technician Manager	Fabrikam, Inc.
Jamison, Jay	JAMI0001	Support Manager	TWO, Inc. Wareh
Kahn, Wendy Beth	KAHN0001	Technician Manager	Fabrikam, Inc.
Kennedy, Kevin	KENN0001	Support Manager	Fabrikam, Inc.
Levy, Steven B.	LEVY0001	Support Manager	Fabrikam, Inc.
Lyon, Robert	LYON0001	Technician Manager	TWO, Inc. Wareh
Lysaker, Jenny	LYSA0001	Technician Manager	TWO, Inc. Wareh
Martinez, Sandra I.	MART0001	Support Manager	Fabrikam, Inc.
Mughal, Salmon	MUGH0001	Technician Manager	Fabrikam, Inc.
Nagata, Suanne	NAGA0001	Technician Manager	Fabrikam, Inc.
Reeves, Randy	REEV0001	Support Manager	Fabrikam, Inc.
Stewart, Jim	STEW0001	Technician Manager	Fabrikam, Inc.
Tiano, Mike	TIAN0001	Technician Manager	Fabrikam, Inc.
Tibbott, Diane	TIBB0001	Support Manager	Fabrikam, Inc.
Walton, Bryan	WALT0001	Technician Manager	Fabrikam, Inc.
Walton, Bryan J	WALT0002	Technician Manager	Fabrikam, Inc.
West, Paul	WEST0001	Technician Manager	Fabrikam, Inc.

Number of Employees Listed: 30

Printed by: sa
Report: Employee List

1

Employee Summary

Report Writer name

Employee Summary by Emp ID

Report tables

HR_Employee_Summary_tem
p_header
Payroll Master - HR Alias
Payroll Master
HR_Division2
Payroll Position Setup - HR
Alias
Payroll Department Setup -
HR Alias
Payroll Address Master - HR
Alias
HR_Employee_Summary_tem
p_body*

Ranges

Department
Division
Employee ID
Last Name
Position
Social Security Number

Sorting options

Employee ID
Last Name

Include

Inactive Employees

The Employee Summary report lists the name of each employee with personal information such as address, city, ZIP code, home phone number, employee identification number, Social Security number, and date of birth. The report also includes the employee position, department, division, and hire date. The report then lists various employee history data, such as positions held in the company, education, training, review, tests, discipline, grievance, and skills.



To print this report with information from multiple companies, use the Human Resources Cross-Company window (Reports >> Human Resources >> Cross-Company). Select Employee Summary in the Reports list and List By Location in the Sub-reports list.

Printing Instructions

1. Choose Reports >> Human Resources >> Employee >> Report Options to open the Employment Report Options window.
2. Enter an option name, select the Employee Summary report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Employment Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Employee Summary

Employee Summary

*=Inactive Employee

Smith, Denise Michele

Address:	432 E Ferry Rd	Emp ID:	0010023
		Soc Sec Number:	000-00-0003
City:	Anderson	State:	SC
Phone:	(803) 555-0105 Ext. 0000	Zip:	29629
Position:	Administrative Assistant	Hire Date:	11/1/2005
Department:	Administration	Birth Date:	3/11/1952
Division:	Main		

Position History

Date	Position	Status	Reason
4/12/2007	Administrative Assistant	Active	setup
11/1/2005	Supervisor	Active	Hired.

Salary History

Date	Pay Code	Salary	Reason
4/12/2007	HOUR	95680.08000	updates
4/12/2007	PRFT	0.00000	updates

Education History

School	Degree Major	Graduation
Yale	MA Economics	1991

Review History

Date	Review Type	Score
10/6/2005	Supervisor	0.00000

Printed By: sa
Report: Employee Summary by Emp ID

1

Vets-100

Report Writer name

Vets- 100 Preparation Report

Report tables

Vets100_Temp

Company Master - HR Alias

Range

Location

Sorting option

Division

The Vets-100 form, otherwise known as the Federal Contractor Veteran's Employment Report Vets-100, shows the total number of employees or new hires who are special disabled veterans, Vietnam era veterans, or other veterans in specific hiring locations in your company. The form also shows the veteran employees' company positions.

Printing Instructions

1. Choose Reports >> Human Resources >> Employee >> Report Options to open the Employment Report Options window.
2. Enter an option name, select the Vets 100 report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Employment Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

OSHA 301

Report Writer name

OSHA 101

Report tables

HR_Injury

Payroll Master - HR Alias

Payroll Address Master

HR_Department_Access

HR Division Access

Payroll Address Master - HR
Alias

HR_Notes

Range

Case Number

Sorting option

Case Number

The OSHA 301 form is the Department of Labor's Bureau of Labor Injury and Illness report. This form requires detailed information on the nature and circumstances of an accident at a job site.

Printing Instructions

1. Choose Reports >> Human Resources >> Injury >> Report Options to open the Injury Report Options window.
2. Enter an option name, select the OSHA 301 report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Injury Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

OSHA's Form 301

Injury and Illness Incident Report

U.S. Department of Labor
Occupational Safety and Health Administration

This *Injury and Illness Reports* one of first forms you must fill out when a recordable work-related injury or illness has occurred. Together with the *Log of Work-Related Injuries and Illnesses* and the accompanying *Summary*, these forms help the employer and OSHA develop a picture of the extent and severity of work-related incidents.

Within 7 calendar days after you receive information that a recordable work-related injury or illness has occurred, you must fill out this form or an equivalent. Some state workers' compensation, insurance, or other reports may be acceptable substitutes. To be considered an equivalent form, any substitute must contain all the information asked for on this form.

According to the Public Law 91-596 and 29 CFR 1904, OSHA's recordkeeping rule, you must keep this form on file for 5 years following the year to which it pertains.

If you need additional copies of this form, you may photocopy and use as many as you need.

Completed by _____
Title _____
Phone _____ Date _____

Information about the employee

- 1) Full name Brenda . Diaz
- 2) Street 915 Birch Road
City Detroit State MI ZIP 48233-92
- 3) Date of birth 1/6/1969
- 4) Date hired 11/17/1997
- 5) Male Female

Information about the physician or other health care professional

- 6) Name of physician or other health care professional Matthew Charles
- 7) If treatment was given away from the worksite, where was it given?
Facility _____
Street _____
City _____ State _____ ZIP _____
- 8) Was employee treated in an emergency room?
No _____
- 9) Was employee hospitalized overnight as an in-patient?
No _____

Information about the case

- 10) Case number from the Log 00001
- 11) Date of injury or illness 12/22/2001
- 12) Time employee began work 09:00 am
- 13) Time of event 10:28 am Check if time cannot be determined

14) What was the employee doing just before the incident occurred?

Acquiring supplies

15) What happened?

I attempted to reach for an item on the stockroom shelf. I lost my balance, and caused a floor tile to loosen. This twisted my left ankle as I fell to the ground.

16) What was the injury or illness?

Sprain

17) What object or substance directly harmed the employee?

Loose Floor Tiles

18) If the employee died, when did death occur?

Full Time Equivalency (FTE) Headcount with Employees

Report Writer name

FTE Headcount With
Employees

Report tables

Virtual_Org_MSTR
Multiple_Positions*
HR_Division2
Payroll Master - HR Alias
Payroll Master
Payroll Department Setup -
HR Alias
Payroll Position Setup - HR
Alias

Sorting option

Company

The Full Time Equivalency (FTE) Headcount with Employees report lists the employees, their employee identification numbers, and the FTE total. The employees are grouped by division, department, and position. The report also lists the total FTE for each position, the number of employees in the position, and the number of vacancies.

Printing Instructions

1. Choose Reports >> Human Resources >> Organization >> Report Options to open the Organization Report Options window.
2. Enter an option name, select the FTE Headcount With Employees report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Organization Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Full Time Equivalency (FTE) Headcount with Employees

Full Time Equivalency (FTE) Headcount with Employees

Division:		
Department:	SALE	Sales
Job Title:	FSR	Field Sales Representative
<u>Employee ID</u>	<u>Name</u>	<u>FTE</u>
BUCH0001	Buchanan, Nancy	0.75
Total FTE for Position:		0.75
Number of Employees in Position:		1
Number of Vacancies in Position:		0

Division:		
Department:	MAIN	Main
Job Title:	ACCT	Accounting
Job Title:	ATC	Accounting Clerk
<u>Employee ID</u>	<u>Name</u>	<u>FTE</u>
DELA0001	Delaney, Aidan	1.00
DOYL0001	Doyle, Patricia	1.00
Total FTE for Position:		2.00
Number of Employees in Position:		2
Number of Vacancies in Position:		1

Division:		
Department:	MAIN	Main
Job Title:	ACCT	Accounting
Job Title:	SUP	Supervisor
<u>Employee ID</u>	<u>Name</u>	<u>FTE</u>
LEVY0001	Levy, Steven	1.00
Total FTE for Position:		1.00
Number of Employees in Position:		1
Number of Vacancies in Position:		0

Employee Orientation Checklist - Detail

Report Writer name

Employee Orientation
Checklist - Detail

Report tables

HR_Orientation_V2
Payroll Master - HR Alias
Payroll Master
HR_Department_Access
HR_Division_Access
HR_Orientation_LINE_V2

Ranges

Employee ID
First Name
Last Name
Social Security Number

Sorting option

Orientation Setup

Include

Inactive Employees

The Employee Orientation Checklist - Detail report provides a list of orientation events under an event description column. A completed column also is provided to mark which orientation events have been completed. Employees are listed with their names and employee identification numbers.

Printing Instructions

1. Choose Reports >> Human Resources >> Orientation >> Report Options to open the Orientation Report Options window.
2. Enter an option name, select the Emp Orient Checklist Detail report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Orientation Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Employee Orientation Checklist - Detail

Employee Orientation Checklist - Detail

*=Inactive Employee

Ackerman, Pilar	Emp ID: ACKE0001
Orientation Name: Standard	
Start Date: 1/1/1999	End Date: 3/1/1999

Completed	Event Description Person Responsible
X	Notify payroll of new employee
X	W-4 Completed
X	I-9 Completed
X	Completed Employee File
X	Nametag Issued
X	Employee photograph taken
X	Keys Issued
X	Employee Tracking data completed
X	Policy Manual & Safety Manual verification
X	Supervisor's Checklist for new employee returned
X	Hazard communication/right to know training
X	Pre-employment training completed

Printed by: LESSONUSER1
 Report: Employee Orientation Checklist - Detail

1

Requisition List

Report Writer name

Requisition List

Report tables

HR_Requisition

HRP_Multi_Division

HRP_Multi_Department

HRP_Multi_Position

Ranges

Company

Department

Division

Position

Requisition Number

Requisition Status

Sorting options

Requisition Number

Requisition Status

Company

The Requisition List report shows requests to fill position openings in a department. The report lists the requests under each organization, (company, division, and department), as well as status and opening date of the requisition.

Printing Instructions

1. Choose Reports >> Human Resources >> Requisitions >> Report Options to open the Requisitions Report Options window.
2. Enter an option name, select the Requisition List report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Requisitions Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Requisition List

11/8/2005

9:19:35 AM

Requisition List

Req. No.	Status	Organization	Opening Date
1	Open	Company: Fabrikam, Inc. Division: Department: Administration Position: Administrative Assistant	11/8/2005
2	On Hold	Company: Fabrikam, Inc. Division: Department: Administration Position: Accounting Clerk	11/9/2005

Printed By: sa
Report: Requisition List

1

Reviews Due Date

Report Writer name

Reviews Due Date

Report tables

Payroll Master - HR Alias
Payroll Master
HR_Division_Access
HR_Department_Access
HR_Supervisor
HR_Division2
Payroll Department Setup -
HR Alias
Payroll Position Setup - HR
Alias

Ranges

Date
Employee ID
First Name
Last Name
SSN
Department
Division
Emp. Status
Supervisor Code

Sorting option

Division, Dept, Next Review

The Reviews Due Date report lists by department the employees, their employee identification numbers, the dates of their next reviews, and their supervisors. The subsequent departments are listed in alphabetical order.

Printing Instructions

1. Choose Reports >> Human Resources >> Reviews >> Report Options to open the Reviews Report Options window.
2. Enter an option name, select the Reviews Due Date report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Reviews Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Reviews Due Date

11/8/2005

9:24:14 AM

Reviews Due

Company: Fabrikam, Inc.
Division: Main
Department: Administration

Employee: Smith Denise Michele
Job Title: Administrative Assistant
Next Review: 12/1/2005

Employee ID: 0010023

Printed by: sa
Report: Reviews Due

1

Skills Expiration

Report Writer name

Employee Skills

Report tables

HR_Skills_Line
HR_Skills_List
Payroll Master - HR Alias
HR_Department_Access
HR_Division_Access
Payroll Department Setup -
HR Alias
HR_Division2
Payroll Position Setup - HR
Alias
Payroll Master

Ranges

Employee ID
Expiration Date
First Name
Last Name
Position
Social Security Number

Sorting option

Employee ID

Include

Inactive Employees

The Skills Expiration report lists employee skills and the date each skill expires, by employee. You can include inactive employees on this report.



To print this report with information from multiple companies, use the Human Resources Cross-Company window (Reports >> Human Resources >> Cross-Company). Select Skills Expiration in the Reports list and List By Location in the Sub-reports list.

Printing Instructions

1. Choose Reports >> Human Resources >> Skills >> Report Options to open the Skills Report Options window.
2. Enter an option name, select the Skills Expiration report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Skills Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Skills Expiration

Skills Expiration

*=Inactive Employee

Smith, Denise Michele **Soc Sec Number: 000-00-0003** **Emp ID: 0010023**
Fabrikam, Inc. / Main / Administration / Administrative Assistant

<u>Expiration Date</u>	<u>Skill Title</u>	<u>Skill Value per Period</u>
0/0/0000	10-key	\$23.00 Hourly
0/0/0000	Collating	\$21.00 Hourly

Number of Skills for this Employee: 2

Total Number of Employees on this Report: 1

Printed by: sa
Report: Employee Skills

1

Turnover Periods Analysis

Report Writer name

Turnover Periods Analysis

Report tables

HR_Turnover_Period_Temp

HR_Division2

Payroll Department Setup -

HR Alias

The Turnover Periods Analysis report includes the number and percentage of turnover, broken down by weeks, months, and years. The periods are summarized by departments.

There are two categories of weeks (0-2, 2-4), four categories of months (1-2, 2-4, 4-6, 6-12), and five categories of years (1-2, 2-5, 5-10, 10-20, 20+). A total number also is given at the bottom of the chart

Range

Date

Printing Instructions

1. Choose Reports >> Human Resources >> Termination >> Report Options to open the Termination Report Options window.
2. Enter an option name, select the Turnover Periods Analysis report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Termination Report Options window will be redisplayed.
4. Choose Print.

Sorting option

Division

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Turnover Periods Analysis

Turnover Periods Analysis

11/1/2002 to 11/1/2005
(Periods summarized by Department)

Fabrikam, Inc./Main Accounting

	Number	Percent
0-2 Weeks	0	0
2-4 Weeks	0	0
1-2 Months	0	0
2-4 Months	0	0
4-6 Months	0	0
6-12 Months	0	0
1-2 Years	0	0
2-5 Years	0	0
5-10 Years	0	0
10-20 Years	0	0
20+Years	0	0
Total	0	

Fabrikam, Inc./Main Administration

	Number	Percent
0-2 Weeks	0	0
2-4 Weeks	0	0
1-2 Months	0	0
2-4 Months	0	0
4-6 Months	0	0
6-12 Months	0	0
1-2 Years	0	0
2-5 Years	0	0
5-10 Years	0	0
10-20 Years	0	0
20+Years	0	0
Total	0	

Printed by: sa
Report: Turnover Periods Analysis

1

Turnover Rate by Department

Report Writer name

Turnover Rate

Report tables

Turnover Report Temporary
File

HR_Division2

Payroll Department Setup -
HR Alias

Range

Date

Sorting option

Division

The Turnover Rate by Department report is a table that summarizes by department or division the turnover rate in a company. A turnover rate equation is given (the number separated divided by employees at start date) and four columns are listed in the chart for each department or division. The four categories are employees at starting date, new hires, number separated, and employees at ending date. A turnover rate is listed in a fifth column.

Printing Instructions

1. Choose Reports >> Human Resources >> Termination >> Report Options to open the Termination Report Options window.
2. Enter an option name, select the Turnover Rate report, and create a report option to sort or restrict the report.
3. Choose Destination. Select a printing destination and choose OK. The Termination Report Options window will be redisplayed.
4. Choose Print.

For more information about printing Human Resources reports, refer to the Human Resources documentation.

Turnover Rate by Department

Turnover Rate by Department

0/0/0000 to 12/31/9999

Turnover Rate = Number Separated / Employees at Start Date

Company: Fabrikam, Inc.

Division/Department Name	Employees at Start Date	New Hires	Number Separated	Employees at End Date	Turnover Rate
Main Accounting	0	5	1	4	0.00%
Main Administration	0	3	0	3	0.00%
Main Installation	0	9	0	9	0.00%
Main Purchasing/Receiving	0	2	0	2	0.00%
Main Sales	0	9	0	9	0.00%
Main Support Services	0	4	0	4	0.00%
Totals:	0	32	1	31	

Printed By: sa
Report: Turnover Rate

1