

Dynamic selections

FAST HR Quick Guide This quick guide describes how to set up and run queries using dynamic selections. Dynamic selections allow you to run reports using your own data sets from other sources (e.g. Excel spreadsheets). You can also create dynamic selections from FAST HR reports.

For more resources, including a guide on FAST HR codes, visit www.uvic.ca/hr/fasthr.

#	Instructions	Screenshot
1	Log in to UVic. From the My online tools menu, choose FAST.	My online tools X Sign out of UVic A-Z Directories Maps Search UVic
2	From the Applications list on the left, choose Human Resource Reporting.	 Application Info Application Info Dashboard Dashboard Pinned Reports Pinned Reports My Schedule Finance Reporting Finance Reporting Human Resource Reporting Human Resource Reporting Register today for upcoming 1 hour accounting training sessions starting in January 2016! FAST Finance Training - Booking
3	Choose the Queries tab, then Dynamic Selections.	Employees Positions Jobs Leave Benefits Earnings setup and YTD Payroll Queries Help Home Image: Comparison of the second seco

#	Instructions	Screenshot
4	Choose Add New to create a new dynamic selection. TIP: After you have created one dynamic selection, the Add New button will appear in the lower left corner of the screen.	Employees Positions Jobs Leave Benefits Earnings setup and YTD Payroll Queries Help Image: Construct of the setup of the
5	The Import Wizard screen will appear. The most common method of creating a dynamic selection is to import an Excel spreadsheet. Select Import from an Excel file and click Browse to find the file on your computer.	Import Wizard Enter Details Schema FASTHR Import from an Excel File Results from a Custom Query Worksheet Report Column FAST Column
6	Once you have uploaded the file from your computer, the file name will appear next to the Browse button. Choose Import .	File Browse Test-file.xls Import Worksheet
7	Open the Worksheet dropdown list. Select the tab in your worksheet that contains the data you wish to use. Click the green checkmark.	Enter Details Schema FASTHR Import from an Excel File Results from a Custom Query Worksheet 'Active Employee List\$' Active Employee List\$ mitterDatabas
8	Open the Report Column dropdown list and choose the column that contains the UVic ID to link to the FAST tool. Click the green checkmark.	 Import from an Excel File Results from a Custom Query Worksheet Active Employee List\$' Report Column FAST Column Varme Status Employee Class Home Org Home Org Desc Dept Xame

#	Instructions	Screenshot
9	Open the FAST Column dropdown list and select UVic ID (External_ID). Click the green checkmark.	Report Column UVic ID FAST Column Image: Column and the second secon
	TIP: To avoid scrolling, type "uv" then the down arrow in the FAST Column field.	UVic ID (VNUMBER) Vac Ann Month (VACANNMONTH) YEARNO (YEARNO)
10	Enter a unique Name and Description for the dynamic selection. Choose Create .	File Test-file.xls Change Worksheet 'Active Employee List\$' Mame Active Employees Description Important details here.
11	A Success message will appear.	Import Wizard Success The Dynamic Selection Active Employees was successfully created.
12	The dynamic selection will now be available in some reports. It will appear in the lower right corner of the filter box as an free symbol.	Prilter Options Prilter Options Job Class Id Click I to add values Image: Click I to add values Image: Click I to add values Image: Click I to add values
13	Click on the dynamic selection symbol. Choose the name of the selection you wish to use. Click on the green checkmark.	Prilter Options Prilter Options Job Class Image: Click Image: Class Click Image: Click Image

#	Instructions	Screenshot
14	To run the report, choose Execute Report .	UVic ID # Position # Change Reason # Active Employees Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason # Image: Change Reason
15	Creating a dynamic selection from a FAST report You may also create a dynamic selection from	1 15-Apr-2016 A 2397.92 31.55 57550.00
	an existing FAST HR report (rather than from an Excel spreadsheet.)	1 15-Apr-2016 A 2898.50 38.14 69564.00 534.87
	To do so, first execute the report. Choose Dynamic Selection from the options in the bottom right corner.	Notes Save As f_x Dynamic Selection 🔁
16	The import wizard will appear.	Import Wizard Enter Details Schema FASTHR Name Results from Page Report Column M FAST Column

#	Instructions	Screenshot
17	Open the Report Column dropdown list, and select EXTERNAL_ID . Click the green checkmark. Go to Step 9 in this guide and follow the instructions to create and save your dynamic selection.	Enter Details Schema FASTHR Results from Page Report Column FAST Column CF03_TS_DESC EFFECTIVE_DATE SMDI OVER_CODE EXTERNAL_ID HRS_DAY HRS_PAY JOB_ALL_HISTORY
18	You can edit or delete dynamic selections at any time from the Queries tab> Dynamic Selections.) Return to Report • Earnings setup and YTD Payroll Queries Help Selection > View/Edit Dynamic Dynamic Selections Its ? Help + More
19	To edit a dynamic selection, click on the pencil tool. Update the Name, Description or other details as appropriate. Click Save .	Filter Options Report Results Perform Row # Name Description 1 Active Employees Important details here.
20	To delete a dynamic selection, click on the red X . Click OK in the dialogue box to confirm.	Are you sure you want to delete this dynamic selection? Cancel OK Image: Save Field Column EXTERNAL_ID UVic ID