University of Victoria

FAST HR Quick Guide

Tips & tricks

This quick guide describes basic navigation within the FAST HR reporting tool, including how to use filter options, format columns and export reports.

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

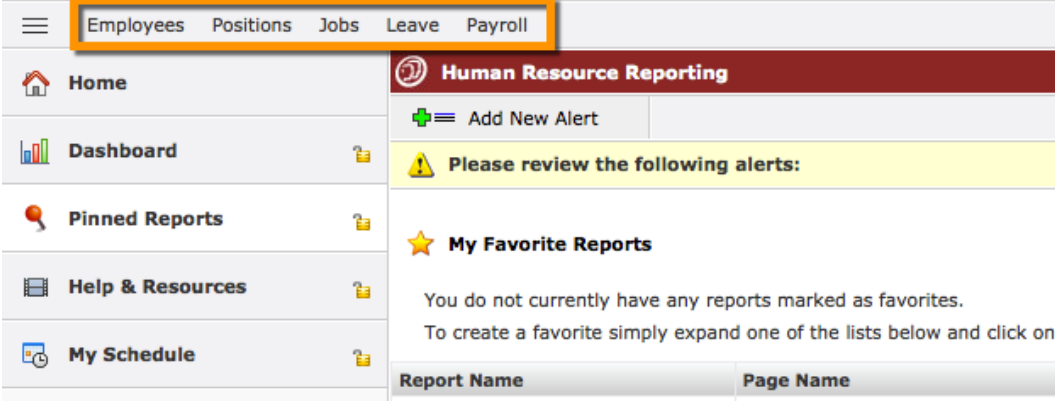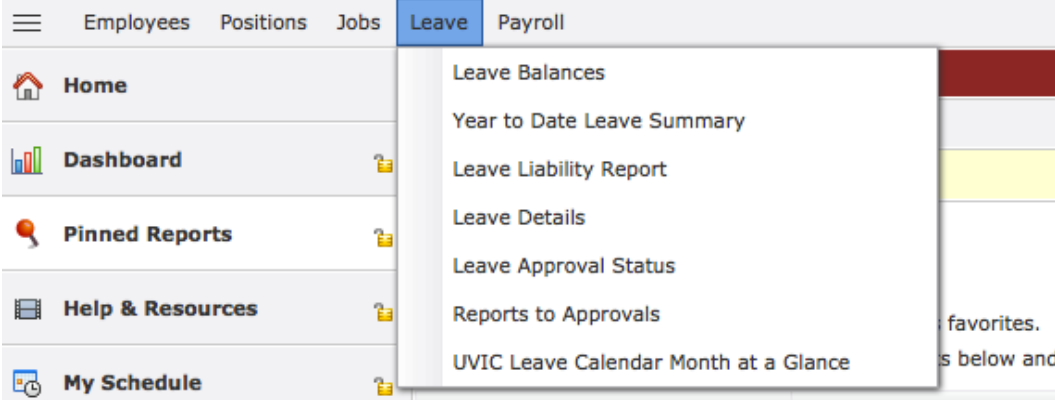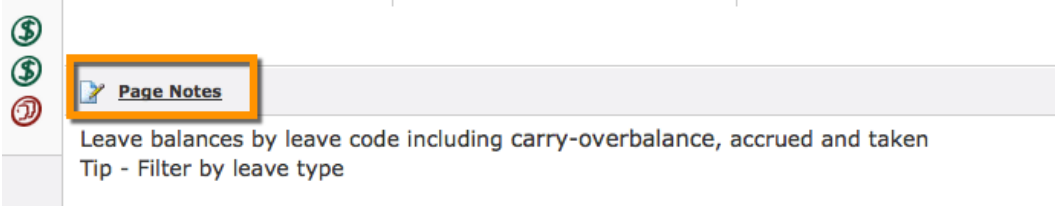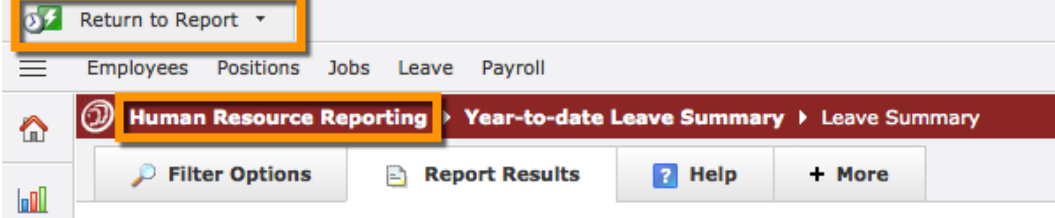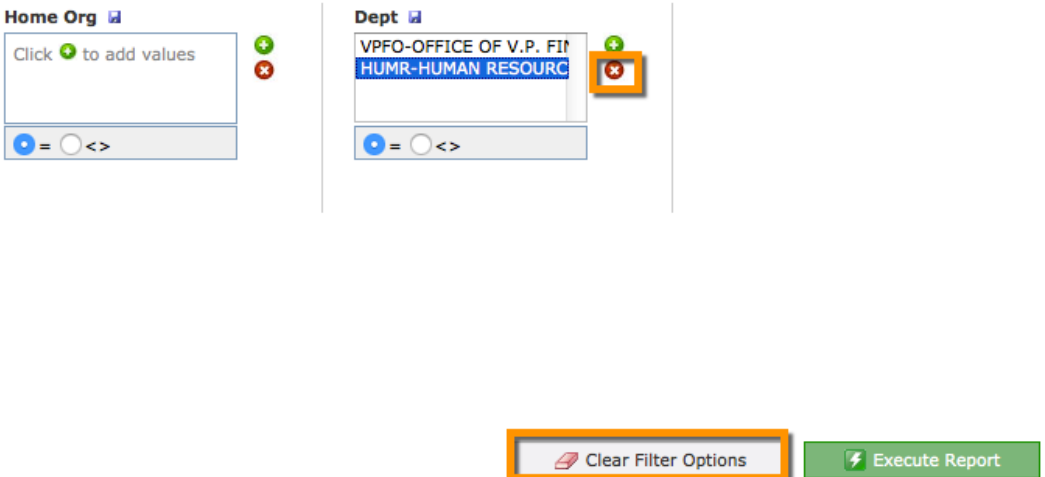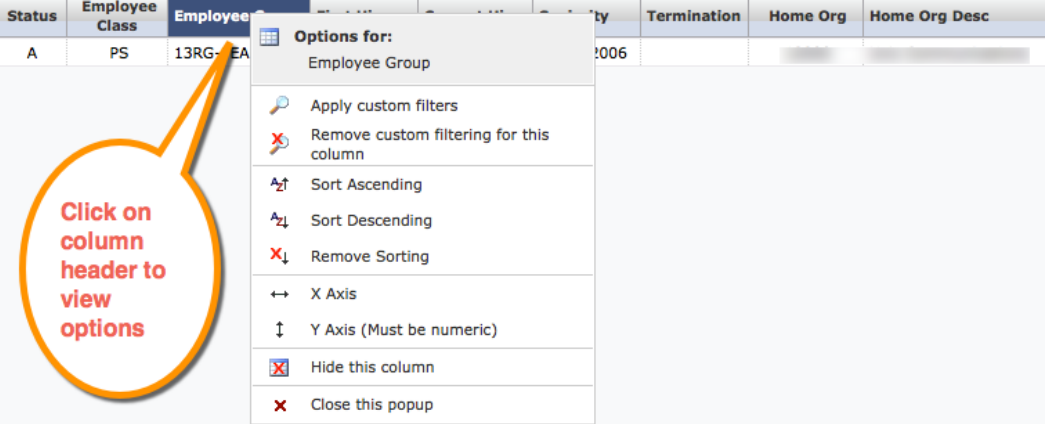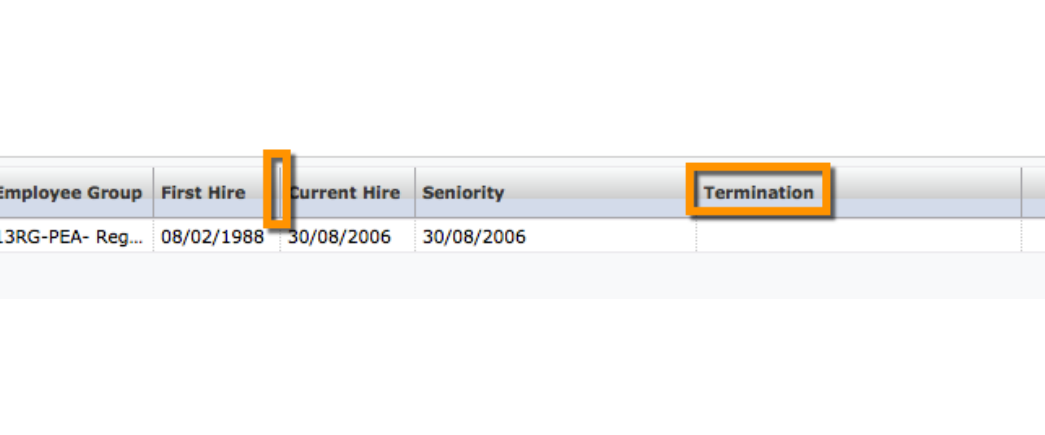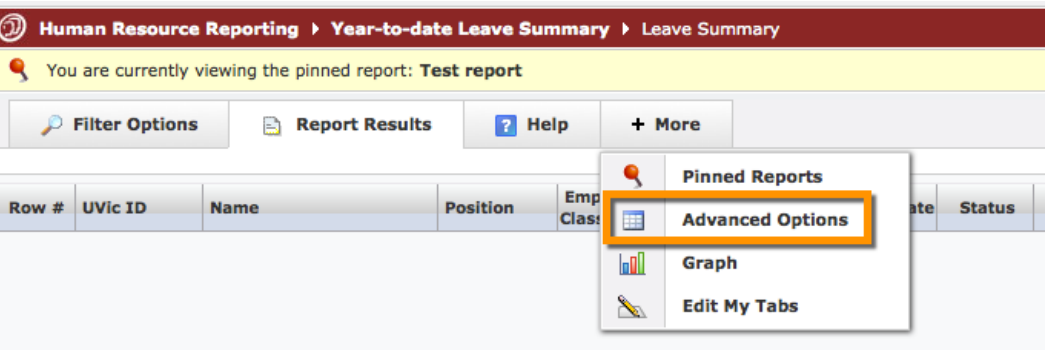| #	Instructions	Screenshot
1	Log in to UVic. From the **My online tools** menu, choose FAST.	*My online tools · Sign out of UVic · A-Z | Directories | Maps · Search UVic*
2	From the Applications list on the left, choose *Human Resource Reporting*. Your viewing access in FAST is based on the Fund/Orgn security that you have been granted.	*Application Info · Dashboard · Pinned Reports · My Schedule · Finance Classic Reporting · Finance Reporting · Human Resource Reporting* **Welcome to FAST version 4.3** The homepage tabs and application icons are now located on the left side of the page. Watch a video on the new navigation features of FAST 4.3 If you require further assistance, please contact the helpdesk: helpdesk@uvic.ca 250-721-7687
3	The red ribbon shows that you are using the Human Resource Reporting tool. The date on the right displays when the data was last refreshed.	Leave Payroll **Human Resource Reporting** *(Data as of 19/11/2015 08:53:54 PM)*

#	Instructions	Screenshot
4	Each tab on the home page serves a different function.	
5	You can expand or collapse the tool bar by clicking on the "hamburger" button in the top left corner.	
6	When the toolbar is collapsed, you can "mouse over" an icon to check its function.	
7	Choose the tab you prefer as your home tab by clicking on the lock icon. **TIP:** To deselect the tab, click the lock again.	

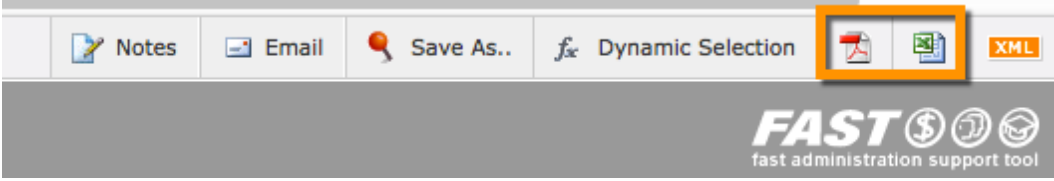| #	Instructions	Screenshot
8	The **Home** tab will take you to the FAST home page, where you can access any of your FAST reporting tools.	
9	The **Dashboard** tab allows you to save and display custom graphs representing selected reports.	
10	From the **Pinned Reports** tab, you can save reports you run frequently.	
11	From the **Help & Resources** tab, you can view and download PDF guides, and access video tutorials on a variety of topics.	

#	Instructions	Screenshot
12	The **My Schedule** tab provides a month-by-month preview of any scheduled reports.	Employees Positions Jobs Leave Payroll — Home, Dashboard, Pinned Reports, Help & Resources, **My Schedule**. Human Resource Reporting — Add New Alert — Please review the following alerts: — Today **November 2015** — Sunday 1, Monday 2, Tuesday 3, Wednesday 4
13	From the top menu bar, different reports are available under each of the five tabs: **Employees, Positions, Jobs, Leave and Payroll**. The name of the tab describes the type of reports you will find in each area.	Employees Positions Jobs Leave Payroll — Home, Dashboard, Pinned Reports, Help & Resources, My Schedule. Human Resource Reporting — Add New Alert — Please review the following alerts: — My Favorite Reports — You do not currently have any reports marked as favorites. To create a favorite simply expand one of the lists below and click on — Report Name — Page Name
14	From each tab there are several reports to choose from.	Employees Positions Jobs **Leave** Payroll — Home, Dashboard, Pinned Reports, Help & Resources, My Schedule. Leave menu: Leave Balances, Year to Date Leave Summary, Leave Liability Report, Leave Details, Leave Approval Status, Reports to Approvals, UVIC Leave Calendar Month at a Glance
15	Page notes on each report indicate the main purpose of the report.	Page Notes — Leave balances by leave code including carry-overbalance, accrued and taken — Tip - Filter by leave type
16	Use the hyperlinks within the system – e.g. *Return to Report* - to navigate rather than the browser arrows at the top of the screen.	Return to Report ▾ — Employees Positions Jobs Leave Payroll — **Human Resource Reporting** ▸ **Year-to-date Leave Summary** ▸ Leave Summary — Filter Options, Report Results, Help, + More

#	Instructions	Screenshot
17	From the **Filter Options** screen, you can apply a variety of filters to make your report more specific. **TIP:** If you have a small department you may not need to use filters.	
18	To apply filters, click on the green plus sign next to one or more of the filter boxes. Different filters will appear depending on which report you choose.	
19	Highlight the filter you wish to apply and choose the green check mark. To apply more than one filter option, hold down the shift or control keys. Continue to apply filters until you are ready to run your report.	
20	You may wish to use a 'wildcard' key word to limit your data—for example, to find all jobs with the term *manager* in the job title. To use a wildcard with the *Current Jobs* report, first run the report and click on the **Job Title** column header.	

#	Instructions	Screenshot
21	Choose **Apply custom filters.**	
22	From the dropdown list, choose **LIKE** or **EQUAL**. Between **%** symbols, enter the wildcard key word. You can search for up to two keywords at the same time. In the screenshot to the right, the wildcard key word is **%manager%.** Click **Apply Filters**.	
23	The report will now isolate and display only the data containing the wildcard key word. In this case, the report shows all data with the keyword *manager*.	

#	Instructions	Screenshot
24	To remove a single filter option, choose the red X next to the appropriate filter box. To remove all filter options, choose the **Clear Filter Options** button. If you don't wish to apply filters, you can run the report using the green **Execute** button.	
25	You can customize columns to make them work best for your report. Click on the column header to view the options. You can hide columns, change sort options or apply custom filters.	
26	To change the position of columns in your report, mouse over the column title and left click to drag and drop the column to a different position. To change column width, drag the grey vertical line between columns until it is in the desired position.	
27	You can also access advanced formatting options from the **+More** tab. The **Advanced Options** tab allows you to easily remove, move or rename columns. You can also save pinned reports, create graphs and edit tabs.	

#	Instructions	Screenshot
28	To export the report to Excel or to a PDF or XML file, click on the appropriate button on the bottom right of the screen.	
29	You can also pin (save) reports for your own use later. **TIP:** See the *Pinned reports* guide for more information.	