

User's Guide

EECRS Version 4.0



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EECRS, Version 4.0

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Introduction

Welcome to Version 4.0 of EECRS

Welcome to v. 4.0 of the Employment Equity Computerized Reporting System (EECRS). This software is intended for use by employers falling under the Legislated Employment Equity Program (LEEP) and the Federal Contractors Program (FCP).

EECRS provides a fast and easy way for the user to capture and compile employee data and then generate the Employment Equity Forms. EECRS has the ability to run in two modes: the LEEP mode and the FCP mode. The user selects the mode in which to work and all subsequent functionalities reflect the particular mode selected. For example, if the user selects the LEEP mode, the compile function will perform the calculations based on the Regulations accompanying the *Employment Equity Act*; in the FCP mode, the compile function performs calculations based on the requirements of the Federal Contractors Program.

We developed EECRS v. 4.0 for five main reasons and they are:

1. A new Workforce Analysis module based on the 2001 Employment Equity Data Report (EEDR) was incorporated to assist the LEEP and the FCP employers in conducting their Workforce Analysis.
2. The 1980 Standard Industrial Classification (SIC) codes have been replaced with the 1997 North American Industrial Classification System (NAICS) codes.
3. The 1991 National Occupational Classification (NOC) codes have been replaced with the 2001 NOC codes.
4. Statistics Canada has added two new official Census Metropolitan Areas (CMAs).
5. A few added enhancements based on the requests from users were included.

What's New?

- Addition of a workforce analysis feature called “Generate Workforce Analysis Data.” (See “Generate Workforce Analysis Data”.)
- The replacement of Standard Industrial Classification codes with North American Industrial Classification System Codes (see “NAICS Codes”) and the changes from the 1991 NOC to the 2001 NOC.
- Incorporation of two new Census Metropolitan Areas from the 2001 Census, Abbotsford, British Columbia and Kingston, Ontario. (See “Census Metropolitan Areas”.)

- The user will now have the ability to search for NOC codes by description in the Employee Details screen. (See “Employee Details screen”.)
- For reporting in the future, FCP employers will be required to include a valid NAICS code for each employee.
- A safety feature to encourage backup after the compile process.

Version 4.0 Enhancements

EECRS v. 4.0 will allow you to take advantage of some additional enhancements/features, which will be available in both LEEP and FCP modes. These features will be helpful when you conduct your workforce analysis. A feature called “Generate Workforce Analysis Data” will allow you to complete and print workforce analysis data in order to determine the degree of under-representation of persons in the four designated groups (women, Aboriginal peoples, persons with disabilities and members of visible minorities) in each occupational group. For further information, please see the ‘workforce analysis’ guidelines or the virtual workforce analysis workshop on our Web site.

Also, the LEEP employers can take advantage of some additional features available in the FCP mode such as:

- create reports for the different divisions in the organization;
- create reports for customized regions (other than the provinces or the Census Metropolitan Areas);
- create reports for periods that are different from the reporting period under LEEP (e.g. quarterly reports);
- print forms for an area where an employer has less than 100 employees; and
- print forms by occupational group and by NOC 4-digit unit groups.

How to take advantage of the information on divisions and regions

LEEP employers importing their employee data annually from a Human Resources system

For these employers, using the import when in the FCP mode will be similar to using the original import in EECRS v. 3.1. However, the FCP mode has the capability of importing division and region information. Therefore, if your HR system captures division and region information you could modify your download program to include this information when creating the import file (EMPLOYEE.TXT). Please keep in mind that when you view your employee data in the LEEP mode, the division and region information will not appear on the Employee Details screen. To view these data, you must switch to the FCP mode.

LEEP employers using EECRS to keep data on their employees

For those employers who enter employee data manually, there are two options:

1. Enter all employee information in the LEEP mode and then switch to the FCP mode to complete the information regarding divisions and regions.
2. The second option is to enter all employee information in the FCP mode but note that there is no salary type “Actual” in the FCP mode. If you need to record actual salaries for any of your employees, you will have to switch to the LEEP mode.

To avoid errors and discrepancies in your annual employment equity report, we recommend the first option, i.e. that LEEP employers enter their employee information using the LEEP mode, and then switch to the FCP mode to add additional information about each employee.

For further information, consult the FCP mode features described in detail throughout this manual.

Separate Employers

The Generate Workforce Analysis Data module in EECRS v. 4.0 can also be used by separate employers for whom the ‘external availability data’ benchmark includes landed immigrants (i.e. Canadian citizens and landed immigrants).

For further information, please consult the FCP mode features described in detail in this module.

Getting Help

If you experience difficulties installing or working with the EECRS v. 4.0, you can get more information from:

<u>SOURCE</u>	<u>DETAILS</u>
Printed Manual	The manual contains full instructions for using EECRS v. 4.0
Online Help	Help is always available from the Main Menu
Web Site	http://www.hrdc-drhc.gc.ca
Help Line	(819) 953-7510 Monday to Friday 9:00 am to 5:00 pm (local Ottawa time) (Labour Systems)
Postal Mail (LEEP)	Workplace Equity Labour Standards and Workplace Equity 165 Hotel de Ville Phase II, 10th Floor Gatineau, Quebec K1A 0J2
Telephone (LEEP)	(819) 953-7513
Postal Mail (FCP)	Workplace Equity Operations Labour Standards and Workplace Equity 165 Hotel de Ville Phase II, 10th Floor Gatineau, Quebec K1A 0J2
Telephone (FCP)	(819) 953-7526

Installing EECRS v. 4.0

Installing EECRS is similar to installing any other Windows 95-based application. The installation package contains one CD.

System Requirements

- an IBM or compatible computer running Windows 95 or later
- a 486 or later-model processor
- a minimum of 16 megabytes of RAM (32 megabytes is preferable)
- at least 50 megabytes of free hard disk space
- your computer's internal clock set to the YYYY-MM-DD format

Installation Process

Step 1: Set the Date Format in Windows

IMPORTANT: You must set the computer's internal clock format to YYYY-MM-DD before you export your data.

1. Press the **Start** button to activate the Windows taskbar.
2. Choose **Settings, Control Panel**.
3. Double-click **Regional Settings**.
4. Click the **Date** tab.
5. In the Short Date Style field, enter the date format **YYYY-MM-DD**. If you do not see this format in the drop-down list, key it in the space provided.
6. Click **OK**.

WARNING: If you are upgrading from EECRS v. 2.0, 2.1, 3.0, or 3.1 to EECRS v. 4.0, export your data before installing EECRS v. 4.0.

Step 2: Export Your Data

1. Set the Windows Date Format on your computer to YYYY-MM-DD.
2. Open EECRS v. 2.0, 2.1, 3.0 or 3.1.
3. From the Main Menu, select **Utilities, Export Employee Data**.
4. Select the drive where you want to save your data. (We suggest you save to a floppy disk).

5. Type in the file name **employee.txt**.
6. Click **Save**.

Step 3: Install EECRS v. 4.0

1. Close all other applications.
2. Insert the CD into the CD drive.
3. Press the **Start** button to activate the Windows taskbar and choose **Run**.
4. Type **d:\EECRS4.0_SIPREME4.0\Setup**
5. Click **OK**.
6. Select the language you want to use and click **OK**.
7. The install program guides you to fill out employer information such as your name, organization, etc. As you enter information in each screen, click **Next** to move to the next screen. When the installation is complete, the message displayed will read, "Setup has finished copying files to your computer."
8. Select **Yes** to reboot your machine now or select **No** to reboot later.
9. Click **Finish**.

The installation process creates a folder named "C:\Program Files\HRDC\EECRS" on your "C" drive.

Getting Started

Opening EECRS

Throughout the manual and the on-line help, we assume you are already familiar with the Microsoft Windows environment. If not, consult your Microsoft Windows documentation.

Starting the Application

Now that you have EECRS installed on your hard disk, you are ready to use it.

Procedure to start EECRS:

1. Double-click on the **EECRS** shortcut icon on your desktop OR Click the **Start** button on the Windows toolbar (at the bottom of your screen), go to **Programs** and select **EECRS**.
2. Enter the password: **EECRS** (in upper or lower case).
3. Select the language you want to use.
4. Select the program you want to use (LEEP or FCP).
5. Click **OK**.

What you will do in EECRS

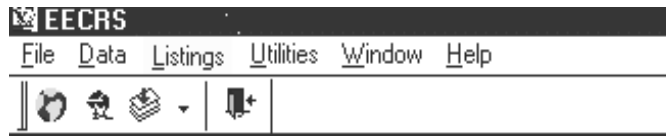
The primary purpose of EECRS is to help you prepare an accurate employment equity report. Once the report is completed, EECRS will assist you in conducting your workforce analysis. This involves the following five tasks:

1. Enter employer information.
2. Enter employee information.
3. Compile data and arrange it for reporting. This function gathers the data you have entered throughout the year and automatically calculates the Employment Equity Forms 1 through 6.
4. Print an up-to-date report and save it to a diskette.
5. Generate and print your Workforce Analysis Data.

To help you manage and report your data more easily, the EECRS Utilities allows you to import and export data from other applications, change employee numbers, change employees' province and change Census Metropolitan Area (CMA) codes.

The Main Menu


The Main Menu, shown below, is the first thing you see after you click the **OK** button on the Logon window.





The Main Menu is your launch pad to EECRS. From the Main Menu, you can enter or edit employer or employee information, compile data and send forms to the printer or to disk.

Main Toolbar

Here is a list of the icons on the main toolbar, together with descriptions of what they do:

Employer Identification  Brings up the Employer Identification screen.

Employee Information  Brings up the Employee Information screen.

Compile Employee Data  Lets you compile data for a specified calendar year (LEEP mode) or for specified To and From dates (FCP mode).

Exit  Closes EECRS.

Changing Operation Mode

You can switch between LEEP mode and FCP mode while you are using EECRS v. 4.0 in three steps:

1. Close all active EECRS windows.
2. From the Main Menu, select **File**.
3. Select Operation mode.












Checking Operation Mode

You can always see what Operation mode you are using by looking at the lower right-hand corner of the screen.

Employee Information Toolbar

You access the Employee Information Toolbar by clicking on **Employee Information** from the Main Toolbar or by selecting **Data, Employee Information**.

Here is a list of the icons on the Employee Information Toolbar, together with descriptions of what they do:

Query		Lets you search for certain employees or groups of employees. (See “Queries”.)
Close		Closes the Employee Information window.
Save		Saves the current record.
Undo all changes		Undoes all work since the previous save. (See “Undo Changes”.)
Print		Prints the active window.
Add		Adds a new employee, promotion or period of contract. (See “Adding a New Employee”.)
Delete		Deletes the selected employee record. (See “Deleting an Employee from EECRS”.)
Find		Finds an individual employee's record.
List		Moves you from the Details screen to the list.
Details		Moves you from the list to the selected employee's Details screen.
Sort		Allows you to sort by nearly any field and to use combinations of sort criteria. (See “Sorting”.)

Employer Identification

Entering Employer Information

Employer information is normally only entered once, with occasional updates. You will enter employer information when you set up your system. You will update it when, for example, the name of your CEO or the name of the person responsible for employment equity changes.

You will enter the following information in the Employer Identification screen:

- Employer's number

LEEP mode

In LEEP mode, this is the 6-digit number that uniquely identifies each legislated employer and appears on the Employment Equity Reports. The Legislated Employment Equity Program assigns a different number to every employer.

FCP mode

In FCP mode, this is the 6-digit certificate number that uniquely identifies each federal contractor and appears on the Employment Equity Reports. The Federal Contractors Program assigns a different certificate number to every employer.

- Country
- Employer's legal name
- Employer's common or business name
- Address of principal place of business
- Mailing address
- Chief Executive Officer's name and title
- Name, title, telephone and fax numbers of the person responsible for employment equity

LEEP mode

In LEEP mode, most of these fields are mandatory; EECRS will not let you save an employer record unless you put data into these fields.

FCP mode

The certificate number and the employer's legal name are mandatory in FCP mode.

Procedure to enter employer information:

1. Click on the **Employer Identification** button on the Main Toolbar.
2. Type information into the appropriate fields. When you are finished in one field, press **Tab** to get to the next one. To move back to a previous field, press **Shift-Tab**.
3. When you finish with the screen, press **Ctrl-S** or click on the **Save** button to save your work.
4. Close the screen to return to the Main Menu.

DATA ENTRY TIP: When entering phone numbers and postal codes, just type in the characters without capital letters, spacing or hyphens. EECRS automatically formats these fields.

Employee Information

Entering Employee Information

The first thing you should do with EECRS v. 4.0 is import the data from any previous versions of EECRS or your HR system. (See “Import Employee Data”.)

Unlike employer information (which you enter only once and update occasionally), you will enter information about many employees and will be updating them more often as work situations change throughout the year.

In the Employee Information screen, you can do the following:

- add an employee's record
- delete an employee's record
- view an employee's record
- change the data in an employee's record to reflect a promotion, the end of a period of contract, a termination or a change in employment status
- look at a list of employees

Adding Employees

Before Entering Employee Records

Before you add or change the employee's record, you will need the following information:

- Employee number
- Employee's name
- Employment status (permanent full-time, permanent part-time, temporary, casual or other - see “Employee Status Codes” and the definitions in Guideline 11 of the Guidelines of the *Employment Equity Act*.)
- Gender
- Hire, promotion and/or termination dates, where applicable
- Salary
- Census Metropolitan Area (CMA) and/or province or territory where the employee works. (See “Census Metropolitan Area (CMA) Codes”.)
- National Occupation Classification (NOC) code. (See “Finding NOC Codes”.)

- Whether the employee is an Aboriginal person, a person with a disability or a member of a visible minority. (See the results of your Self-Identification survey.)
- North American Industrial Classification System (NAICS) code of the industry in which the employee works. (See “NAICS Codes”.)

FCP mode

- Division and region codes

IMPORTANT: Have this information available BEFORE you enter any data. Most fields are mandatory; EECRS will not let you save a record until you have entered data into all mandatory fields.

Adding a New Employee

1. Click on the **Employee Information** icon from the Main Toolbar. (From the Main Menu, go to **Data, Employee Information**.)
2. A response window comes up asking if you want to Add or Query/Delete an employee. Choose **Add**, then click **OK**.
3. In the Employee Details screen, type in your data, pressing **Tab** to move to each new field. To move back a field, press **Shift-Tab**.
4. When you have finished adding the record, press **Ctrl-A** to save it and begin a new one. To save a record without adding a new one, press **Ctrl-S**; or go to **File, Save**; or click on the **Save** icon.

If you enter a temporary or casual employee, you will have to enter a Start Date, End Date and Termination Date (if applicable) in a separate screen. (See “Periods of Contract”.)

When adding new records, you can view them in list form by clicking on the **List** icon. EECRS will then display your new records in list form. To go back to the employee's record, click on the **Details** icon. To view your entire employee list, see “Employee List”.

You may print three reports that list employee information; see “Printing the Employees”, “Printing the Period of Contract” and “Printing the Promotions”.

Employee Details screen

LEEP mode

In LEEP mode, the Employee Details screen General tab looks like this:

The screenshot shows the EECRS 4.0 application window with the 'Employee Details' dialog box open to the 'General' tab. The form contains the following fields and values:

Field	Value
Employee Number	1564546
Last Name	Smith
Given Name	Joe
Employee Status	Full-Time
Gender	Male (selected)
Comment	
Hire Date	1995/04/01
Termination Date	0000/00/00
Salary	65,000
CMA	Calgary
Province	Alberta
NOC Code & Title	2175 - Web Designers and Developers
Occ. Group & Title	13 - Professionals
Aboriginal Peoples	<input type="checkbox"/>
Persons with Disabilities	<input type="checkbox"/>
Members of Visible Minorities	<input type="checkbox"/>
NAICS Code & Title	4911 - Postal Service

The status bar at the bottom indicates 'Ready' and the date/time 'September 17, 2003 2:26 pm'.

FCP mode

In FCP mode, the Employee Details screen General tab looks like this:

The screenshot shows the EECRS 4.0 application window with the 'Employee Details' dialog box open to the 'General' tab. The form contains the following fields and values:

Field	Value
Employee Number	654268
Last Name	Smith
Given Name	Joe
Employee Status	Full-Time
Gender	Male (selected)
Comment	
Hire Date	1995/04/01
Termination Date	0000/00/00
Salary	65,000
CMA	Calgary
Province	Alberta
NOC Code & Title	2175 - Web Designers and Developers
Occ. Group & Title	13 - Professionals
Aboriginal Peoples	<input type="checkbox"/>
Persons with Disabilities	<input type="checkbox"/>
Members of Visible Minorities	<input type="checkbox"/>
NAICS Code & Title	4911 - Postal Service
Division	
Region	

The status bar at the bottom indicates 'Ready' and the date/time 'September 17, 2003 2:32 pm'.

NOTE: In FCP mode, you are able to assign an employee to a division and/or a region. For more information, see “Division Codes” and “Region Codes”.

In both FCP and LEEP modes, there are three tabs at the top of the Employee Details screen: General, Promotions and Periods of Contract. These tabs represent ways to view the screen. When you first add a record, EECRS gives you the General view of the detail screen (the screen above shows General view). To view either of the other two, click on their tabs.

For more information, see “Periods of Contract” and “Promotions”.

Undo Changes

Use the undo function to back out of a record without saving your work. Click on the **Undo All Changes** icon. If you use this icon, EECRS will undo changes to the current record since the last save. If you use Undo while you are entering a new record, EECRS removes the new record and closes the Employee Details screen.

Finding NOC Codes

When you are entering data in the Employee Details screen, finding the right NOC code description can be time-consuming, especially when you have to scroll through a list containing hundreds of codes. There are two options for finding a NOC code description quickly.

Option One - Search by NOC Code:

1. Begin typing in the numerical NOC code in the field for NOC code. EECRS will bring you to all the codes that begin with the numbers you enter. You may need to click on the NOC window to activate it.

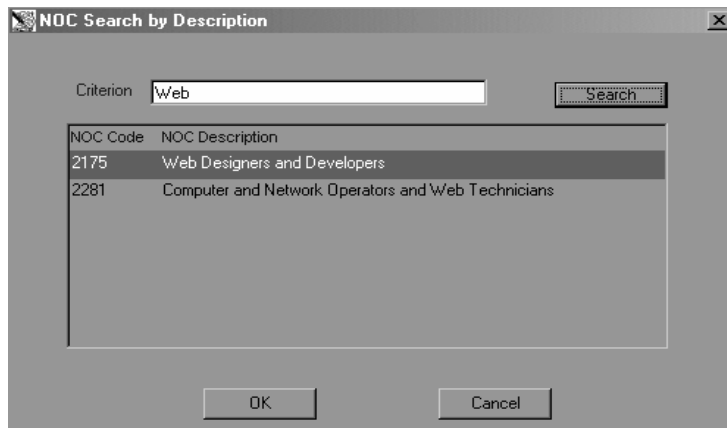
For example, if you want to find the NOC description “Specialists in Human Resources,” type in the first few digits of the code corresponding to this description (in this case, 1121) and EECRS brings you to that description. Once a four-digit NOC code is entered, EECRS automatically assigns the corresponding Employment Equity Occupational Group (EEOG) code.

Option Two - Search by NOC Description:

A new feature in EECRS v. 4.0 allows you to search for NOC codes by description.

1. Click on the **Search by Description** button in the Employee Details screen and the NOC search description window will appear.
2. In the field for “criterion”, enter a full or partial description of the occupational group you are searching for.
3. Click **Search** to display a list of all NOC code descriptions containing the text you entered.
4. Click on the desired NOC Description then click **OK** (or double-click on the desired NOC Description) to add the NOC Code to the Employee Details screen. EECRS automatically assigns the corresponding Employment Equity Occupational Group (EEOG) code.

For example, if you type in the word “Web” in the “criterion” field and click **Search**, all NOC Descriptions containing the word “Web” and their corresponding NOC Codes will be displayed. In this example, *2175-Web Designers and Developers* and *2281- Computer and Network Operators and Web Technicians* are displayed. You can then click on the desired NOC Code and click OK. In this example, we selected *Web Designers and Developers* and the corresponding NOC code, *2175*, to be added to the Employee Details screen.



Salary

EECRS automatically annualizes any salary, other than annual or actual, that you enter into the Salary field. For example, if an employee makes \$16 an hour and works 37.5 hours a week, EECRS automatically multiplies the weekly amount by 52, bringing it to an annual total of \$31,200. EECRS performs similar calculations with other types of salaries-e.g. bi-weekly, monthly, etc. It always annualizes salaries based on a 52-week working year.

NOTE: If you are entering a Temporary or Casual employee, you must enter the Actual salary.

If you enter an employee's bonus, EECRS will automatically add the bonus to the overall salary calculation.

EXCEPTION : Employees on extended unpaid leave for the reporting year are considered “Other” (see Guideline 11: Employment Equity Report for definition). Because EECRS requires salary information in the salary field, you may enter a salary of \$1.00 in order to move to the next field. These employees are only counted on Form 1 and therefore their salary will not be reported on Forms 2 or 3.

For more information on determining salary, see Guideline 11 of the Guidelines of the *Employment Equity Act*.

FCP mode

The salary type “Actual” is not available in FCP mode.

Census Metropolitan Areas (CMAs)

LEEP mode

The Census provides data for 27 CMAs across Canada, as defined by Statistics Canada, including two new official Census Metropolitan Areas: Abbotsford, British Columbia and Kingston, Ontario.

Employers covered under the *Employment Equity Act* are required to report on up to eight designated CMAs, as stated in the Employment Equity Regulations, Schedule 1, Subsection 1(1). The eight designated CMAs are:

Calgary	Edmonton	Halifax	Montréal
Regina	Toronto	Vancouver	Winnipeg

The eight designated CMAs are highlighted in yellow in the drop-down menu of the Employee Details screen in EECRS.

In addition to the eight designated CMAs mentioned above, 19 additional CMAs are available in EECRS . The additional 19 CMAs are:

St. John's	Saint John	Chicoutimi-Jonquière	Québec	Sherbrooke
Trois-Rivières	Kingston	Ottawa-Hull	Oshawa	Hamilton
St. Catharines-Niagara	Kitchener	London	Windsor	Sudbury
Thunder Bay	Saskatoon	Abbotsford	Victoria	

EECRS will NOT print out Forms 2 to 6 for these additional 19 CMAs unless you switch to the FCP mode and ask for these forms.

For the purpose of generating an accurate workforce analysis, EECRS v. 4.0 also includes 13 additional geographic locations outside the provincial CMAs. For example, in Alberta the CMAs available for selection are Calgary and Edmonton. In order to capture data on employees working in Jasper you would use the additional geographic location or “CMA” *Alta. less CMAs*. EECRS will NOT print out Forms 2 to 6 for these additional “CMAs”.

Listed here are the 13 additional geographic locations as they appear in the EECRS:

Alta. less CMAs	B.C. less CMAs	Man. less CMA
N.B. less CMA	N.S. less CMA	N.W.T.
Nfld. less CMA	Nvt.	Ont. less CMAs
P.E.I.	Que. less CMAs	Sask. less CMA
Y.T.		

NOTE: Employment Equity Regulations do not require you to record employee data by CMA outside the eight designated CMAs listed at the beginning of this section. However, the Workforce Analysis module is designed to calculate the total workforce for each of the four designated groups at the CMA level in some instances. In order to enable you to produce the most complete workforce analysis possible, you should enter all employees into one of the 40 CMAs. For a complete list of the 40 CMAs, see “Census Metropolitan Area (CMA) Codes”.

FCP mode

All 40 “CMAs” are available in FCP mode; Forms 2-6 are only generated for the first 27. For a complete list of all CMAs see “Census Metropolitan Area (CMA) Codes”.

NOTE: For each of the CMAs, EECRS will automatically choose the corresponding province, with the exception of Ottawa-Hull, where you must choose Ontario or Quebec.

NAICS Codes

NOTE: Version 3.1 of EECRS used the Standard Industrial Codes (SIC) to identify industrial sectors. In version 4.0, industrial sectors are identified using North American Industrial Classification System (NAICS) codes.

LEEP mode

When entering information on their employees, the employers covered under the *Employment Equity Act* are required to identify the industrial sector in which each employee is working. This information is necessary to allow employers who have activities in more than one industrial sector to report the number of employees in each industrial sector as required in Boxes 10-13 of Form 1.

FCP Mode

In preparation for reporting requirements of the future, Federal contractors must enter a specific industrial sector in which their employees are working.

Division Codes

FCP mode

Division codes are available in FCP mode only.

EECRS v. 4.0 provides an empty division code table that can be customized to describe the organization of your company. You can define codes for company divisions or departments, then use these codes to identify an employee's location in the company. You may define an unlimited number of division codes - although an employee can have only one division code.

This feature is optional and is provided as a tool for your own analysis of your company. Division codes are not required.



Example: Company ABC is a large company with many divisions. Company ABC defines a division code table as follows:

Division code	English description	French description
MKTG	Marketing & Advertising	Marketing et publicité
ACTG	Accounting	Comptabilité
HR99	Human Resources	Ressources humaines
MTCE	Maintenance	Entretien
MIS1	MIS	SIG
1234	Warehousing & Shipping	Entreposage/expédition

Division codes are any combination of up to 4 letters or numbers. You may enter an unlimited number of division codes.

Division code descriptions are up to 50 characters and can be entered in English and/or French.

Procedure to set up and print the division code table:

1. Confirm that you are in FCP mode. (See “Checking Operation Mode”.)
2. From the Main Menu, select **Data**, then select **Division**. The Division dialog box appears.
3. To enter a new division code, select **Table**, then select **Insert** (or use **Ctrl-I** or use the **Add** icon ) and input new information into the highlighted row. To delete a division, highlight the division, then select **Table**, select **Delete** (or use **Ctrl-D** or use the **Delete** icon ). The division is deleted. To print the division code table, select **File**, then select **Print** (or click on the **Print** icon).
4. When you are done with your changes, select **File**, then select **Close**.

Region Codes

FCP mode

Region codes are available in FCP mode only.

EECRS v. 4.0 provides an empty region code table that can be customized to describe the organization of your company. You can define codes for company regions then use these codes to identify an employee's location in the company. You may define an unlimited number of region codes - although an employee can have only one region code.

This feature is optional and is provided as a tool for your own analysis of your company. Region codes are not required.



Example: Company ABC is a large company with many regional offices. Company ABC defines a region code table as follows:

Region code	English description	French description
EAST	East	Est
WEST	West	Ouest
CTRL	Central	Centre
HEAD	Head office	Siège social

Region codes are any combination of up to 4 letters or numbers. You may enter an unlimited number of region codes.

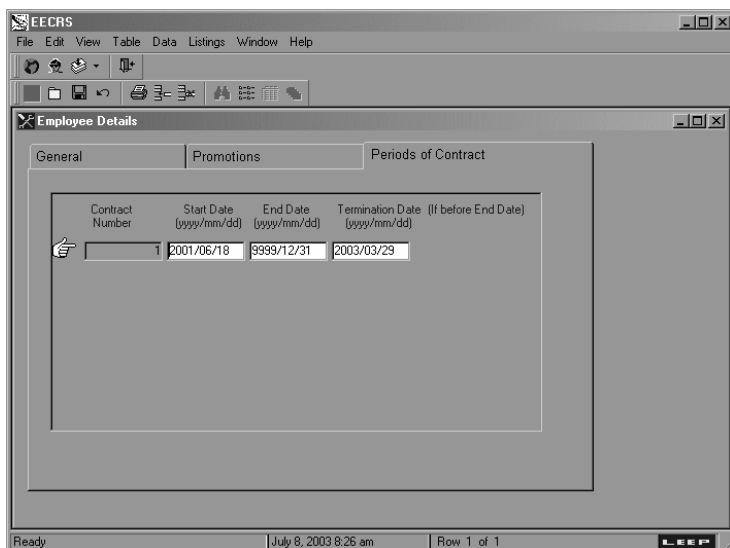
Region code descriptions are up to 50 characters and can be entered in English and/or French.

Procedure to set up and print the region code table:

1. Confirm that you are in FCP mode. (See “Checking Operation Mode”.)
2. From the Main Menu, select **Data**, then select **Region**. The Region dialog box appears.
3. To enter a new region code, select **Table**, then select **Insert** (or use **Ctrl-I** or use the **Add** icon ) and input new information into the highlighted row. To delete a region, highlight the region, then select **Table**, select **Delete** (or use **Ctrl-D** or use the **Delete** icon ) . The region is deleted. To print the region code table, select **File**, then select **Print** (or click on the **Print** icon).
4. When you are done with your changes, select **File**, then select **Close**.

Periods of Contract

The Periods of Contract tab of the Employee Details screen looks like this:




Contract Number	Start Date (yyyy/mm/dd)	End Date (yyyy/mm/dd)	Termination Date (If before End Date) (yyyy/mm/dd)
1	2001/06/18	9999/12/31	2003/03/29

When you enter a temporary or casual employee, EECRS requires information concerning start dates, end dates and termination dates.

When you type Casual or Temporary into the Employee Status field in the General tab, you will notice that the Hire Date and End Date fields become inactive.

This means you must enter each contract's Start Date and End Date for Casual and Temporary employees.

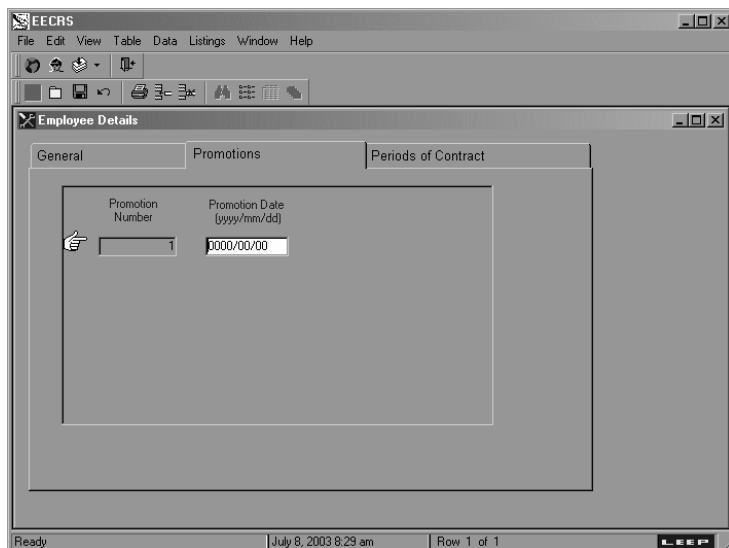
Procedure to enter Period of Contract information:

1. From the General tab, click on the **Periods of Contract** tab. You will also get to this tab by entering all required information in the General tab, then pressing **Ctrl-A** or **Ctrl-S**.
2. Enter the Start Date, End Date and, if applicable, the Termination Date. Remember that the End Date and Termination Date must be equal to or later than the Start Date. (Make sure you enter the Termination Date only if the employee was terminated before the End Date.) If you are entering a subsequent period of contract, click on the **Add** icon .
3. When you are done, press **Ctrl-S** or **Ctrl-A** to save and add a new employee in the General tab. Or, when you are done in this tab, click on the **General** tab to continue adding employee records.

See also “Employee Details screen” and “Promotions”.

Promotions


The Promotions tab of the Employee Details screen looks like this:



When an employee is promoted, you can record the promotion in the Promotions tab in the Employee Details screen.

Procedure to enter promotion information:

1. From the General tab, click on the **Promotions** tab. A message box will appear reminding you that the NOC code of the employee may be affected by this promotion. Click **OK**.

2. Enter the date of the promotion. If you are entering a subsequent promotion, click on the **Add** icon  on the Main Toolbar. Remember that the Promotion Date must be later than the Hire Date and earlier than the Termination Date.
3. When you are finished, press **Ctrl-S** or **Ctrl-A** to save and go to the **General** tab to add a new employee. See “Employee Details screen” and “Periods of Contract”.

Queries

The Query function is a powerful tool that helps you find individual employees or groups of employees.

Procedure to query employee records:

1. Click on the **Employee Information** icon from the Main Toolbar. A response window appears asking if you want to Add or Query/Delete. Choose **Query/Delete**.
OR
If you are already in the Employee Details screen, click on the **Query** icon.
2. In the Query screen, enter the information you want to search. (You may query by any category except Comment, Hire Date, and Salary). To see all employees, leave all categories blank.

A new feature in EECRS v. 4.0 allows you to search for NOC codes by entering a description of the occupational group. This feature is only available under the “Employee Information” menu item. For more information, refer to “Finding NOC Codes”.
3. Click **OK**.
EECRS will display either an individual employee's record or a list of employees matching your query criteria. If EECRS cannot find matching records, it brings you back to the Query screen. Try again, using different information.

Employee List

Procedure to look at your entire list of employees:

1. Click on **Employee Information** from the Main Toolbar.
2. When the response window comes up asking you if you want to Add or Query/Delete, choose **Query/Delete**.
3. When the Query screen comes up, leave all fields blank and click **OK**.
The list of all your employees will appear. (If you have a lot of employees in EECRS, bringing up the list may take some time.)

You can look at the details of an individual employee by double-clicking on the employee's record from the list. This will bring you to the Employee Details screen. To go back to the list, click on the **List** icon. EECRS will display your recently entered records. If you have already done a query, EECRS will display your recently entered records plus your previously queried records.

Sorting

Procedure to sort by one category:

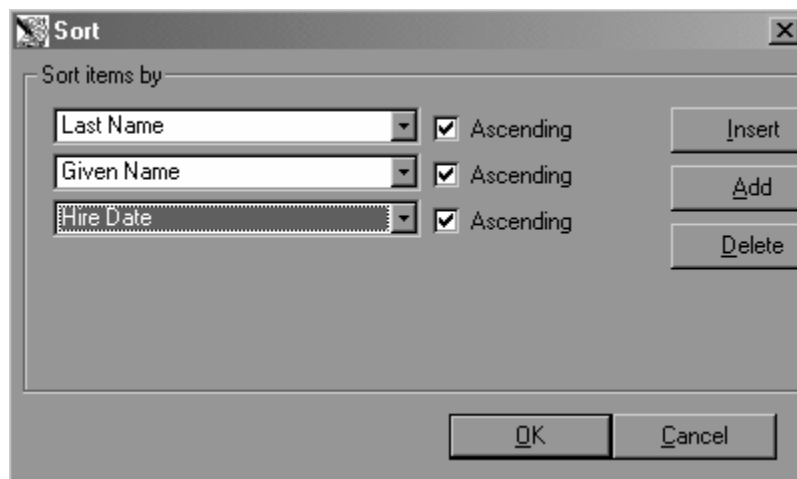
1. Go to the employee list. (See “Queries”.)
2. Click on the column heading you want to sort by. EECRS sorts the list in ascending order.
3. To change the sorting order from ascending to descending or vice versa, click the column heading again.

For example, clicking on the “Last Name” column heading sorts the list alphabetically by last name, in ascending order (A-Z). Click on the Last Name column heading again and the list is sorted in descending order (Z-A).

Procedure to sort by multiple categories:

You can sort your employee list by multiple categories by using the Sort command. The Sort dialog box provides a much more sophisticated sorting method. Multiple criteria can be sorted in ascending or descending order.

1. Click on the **Sort** button on the far right of the Employee Information toolbar or select **View, Sort**. This brings up the Sort dialog box, shown below.



2. Enter the criteria you want to sort by. To add more criteria, click the **Add** button. Another blank sort item will appear.
3. To sort each category in ascending order, click in the **Ascending** box. To sort in descending order, leave the Ascending box blank.

4. Highlight a sort item in your list, and then click the **Insert** button to add an empty sort criteria box before the highlighted item.
5. When you have entered all your criteria, click **OK**.

Deleting an Employee from EECRS

Procedure to delete an employee from EECRS:

1. Bring up the Query screen. (See “Queries”.)
2. Enter the information you will use to find the employee (number, name, etc.).
3. When the list comes up, click on the employee's record.
4. Click on the **Delete** button on the Employee toolbar. A message box will ask you if you are sure you want to delete this employee.
5. Click **Yes**.

To delete groups of employees from EECRS, see “Batch Delete Employees”.

Changing an Employee's Record

Sometimes your employees' work situations change throughout the year - for example, they may be promoted, transferred or terminated.

Procedure to change an employee's record:

1. Find the employee by using the Query function. (See “Queries”.)
2. When the list comes up, scroll down until you find the employee's record.
3. Double-click on the employee's record.
4. In the Employee Details screen, make the necessary changes. (You cannot change the employee number in this screen. To change an employee number, see “Change Employee Number”.)
5. When you are done, save your changes by pressing **Ctrl-S** or clicking on the **Save** icon.

REMINDER: If you want to save the current record and then enter a new one, press **Ctrl-A**.

Reporting Your Data

Meeting the Reporting Requirements of the *Employment Equity Act*

LEEP Employers

Each year, on or before June 1st, you are required to submit your employment equity report to Human Resources and Skills Development (HRSD). The reporting period is from January 1st to December 31st of the preceding calendar year. For example, on June 1st, 2004, you will report for the period from January 1st to December 31st, 2003. These reports help us measure the progress of designated group members in your workforce.

The employment equity report consists of six forms. These forms contain information on your employees by status, geography, occupation and salary. They also provide information on employees' movements throughout the year (hires, promotions and terminations). These forms will be produced if you are using LEEP mode.

The employment equity report produced by EECRS can be submitted to HRSD on diskette or via the Internet at the following address: ee-eme@hrdc-drhc.gc.ca. When you report this information to HRSD, no employee names accompany the report. The report you submit contains ONLY the total number of employees in each category. Electronic or hard-copy employment equity reports do not contain names or any other personal information about your employees.

FCP Employers

Employers who bid on large federal government contracts sign a certificate in which they commit to implement an employment equity program. When FCP employers are undergoing a compliance review/audit, they are required to provide the review officer data on their workforce. They can generate the data by using the “Compile” option in the FCP mode and specifying an appropriate time frame.

Compiling, Saving and Printing Data

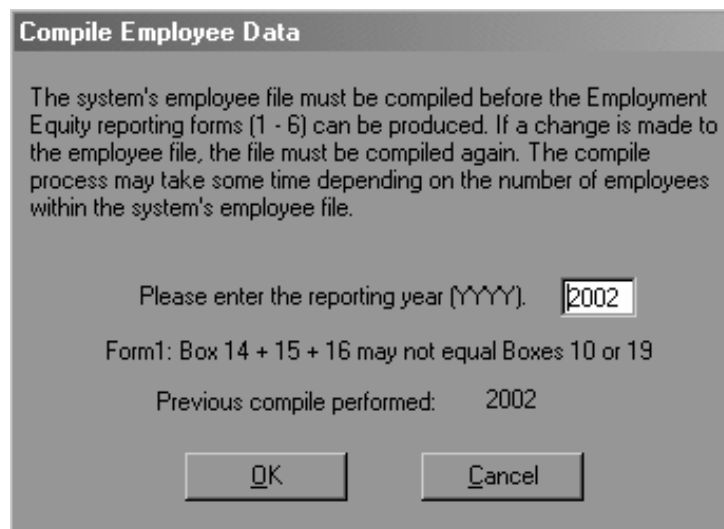
Preparing your report in EECRS is a two-stage process: first, EECRS compiles all the data you have entered for the reporting year and second, you save this information to a diskette. Before you print the forms in EECRS, you have to ask it to aggregate the data you have entered. Compiling may take some time, depending on how many employees are in EECRS.

WARNING: In LEEP mode, the compile process performs calculations based on the regulations under the *Employment Equity Act*. In FCP mode, the compile process performs calculations based on the Federal Contractors Program. These calculations are different. Before you compile, confirm that you are in the correct operation mode. (See “Checking Operation Mode”.)

LEEP mode

To compile your data:

1. Go to the Main Menu and select **Data, Forms, Compile Employee Data**.
2. Enter required information into the Compile Employee Data dialog box. This is the LEEP mode dialog box:



3. Click **OK**.
4. Once EECRS has compiled your data, it asks you if you want to save it on a floppy disk. We recommend that you click **Yes** at this point; it will save you time when you submit your reports. After selecting **Yes**, a message box appears followed by a **Save As** where you can select the a: drive in which forms.txt will be saved. At this point, the information will be stored on a floppy disk which you will send to us. If you want to review your compiled data on paper or screen, you can print or preview the compiled reports (see “Viewing Forms Before Printing” and “Printing Forms”).
5. A message box appears strongly advising you to backup your employee data. Click **OK**. (See “Backup/Restore” for more information.)

If you did not save your data to disk after the compile, you can do it as follows:

1. From the Main Menu, select **Utilities**.
2. Choose **Copy Forms 1-6**.
3. Select the a: drive to save your data.

4. Make sure the filename **FORMS.TXT** is in the file name field.
5. Click **Save**.

FCP mode

To compile your data:

1. Go to the Main Menu and select **Data, Forms, Compile Employee Data**.
2. Enter required information into the Compile Employee Data dialog box.

This is the FCP mode dialog box:

NOTE: You must enter a date range. This could be for a few days, a few months, a year or longer.

This is the FCP mode customized dialog box:

Use the drop-down menus to select your customized compile criteria. Your employee information in the reports is then limited by these criteria. For example, if you want to see reports containing only employees in Manitoba, select “Manitoba” from the Province menu. If you want to limit your reports to only employees in Vancouver with NOC 1122, then select “Vancouver” from the CMA menu and “1122” from the NOC menu. If you want all the Systems employees in the East region, then select the appropriate criteria from the division and region drop-down boxes.

When you use criteria to limit the compiled reports, be aware that some of the reports may not be produced. For example, if you select a specific province, then the national reports are not produced. If you select a CMA, then the national reports and the provincial reports are not produced. If you select a specific region, then national, provincial and CMA reports are produced only for employees in the selected region.

You can select which reports to print. For example, if National is checked off in the Report By column, then only the National reports will be produced. A common request would be to produce a report for all Semi-professionals and Technicians in Ontario. To produce this report you would:

- a) Select Ontario from the Province drop-down list in the *Compile Criteria* column.
- b) Select Professionals from the EEOG drop-down list in the *Compile Criteria* column.
- c) Check the Province check-box in the *Report By* column.
- d) Ensure that all the other check-boxes in the *Report By* column are unchecked.

Advice to employers:

When producing reports using the “Export Internal Workforce Analysis Data” function for the workforce analysis, we recommend using two different sets of compile dates. For the “stock” or “snapshot” data, we recommend using the date of one day, for example December 31. For the flow data, the hires, promotions, and terminations, we recommend using the period of time from the last compliance review/audit to the present (present means to the date for which you wish to compile your data for this review).

The difference is this: In the FCP mode, if you enter a start date of April 1, 1996 and an end date of March 31, 2000, you would get all the hires, promotions and terminations over this period. But, if you use this same report to do a workforce analysis, you will have all of those terminated in this period listed on Form 2.

Say, for example, you have a company of 1000 employees on April 1, 1996. Over the years you have hired an additional 500 persons and have let 500 go. That means you have a stable workforce number of 1000. Form 2, however, will show you as having a workforce of 1500 for this same period. LEEP subtracts out those terminated, but FCP does not. Therefore, the current workforce analysis should be done using a narrow date range.

3. A message box appears strongly advising you to backup your employee data. Click **OK**. (See “Backup/Restore”.)
4. If you want to review your compiled data on paper or screen, you can print or preview the compiled reports. (See “Viewing Forms Before Printing” and “Printing Forms”.)

Viewing Forms Before Printing

Procedure to view forms on screen:

1. Select **Compile Employee Data** from the Main Menu or go to the Main Menu and select **Data, Forms**.
2. In the Forms sub-menu, click on the form you want to view.
3. If the form has more than one page, press **Page Down** and **Page Up** to look at the different pages. (The page numbers appear on the bottom right hand corner.)

FCP mode

If you use the Customized Compile option in FCP mode, the criteria used are shown in the lower left hand corner of each page.

Printing Forms

Procedure to print compiled data:

1. Select **Compile Employee Data** from the Main Menu or go to the Main Menu and select **Data, Forms**.
2. Click on or select the form you want to print.
3. When the form comes up, click on the **Print** icon or press **Ctrl-P**.
4. When the Print dialog box appears, select the desired printer.
5. Click **OK**.

FCP mode

If you use the Customized Compile option in FCP mode, your criteria are printed in the lower left hand corner of each page.

REMEMBER: If you make any changes to your data in EECRS, you will have to compile again before reporting. This will ensure that your report is as up to date as possible.

Reporting Casual Employees as Temporary and Vice Versa

LEEP mode

Sometimes you might define an employee's status as Casual, when in fact the employee is Temporary. During the compile, EECRS counts employees who worked twelve weeks or more as Temporary, even if you have entered them as Casual. EECRS converts Temporary employees to Casual if they have worked less than twelve weeks. This is to meet our definition of Temporary employees and ensure accurate reporting. However, these conversions are for reporting purposes only - the original records remain unchanged.

To see where EECRS has made any such conversions, from the Main Menu, select **Data, Forms, Display Temp/Casual Conversions**. EECRS will display a report showing any affected records.

FCP mode

No changes are made to any employee status. Employees are counted as they are specified in the data and no verification is made.

Printing the Peak Date report

LEEP mode

If you are in LEEP mode, the Peak Date report is available to you after you have compiled your data. The Peak Date report displays the day in the reporting year with the greatest number of employees working.

1. From the Main Menu, select **Data**, then select **Forms**.
2. Select **Display Peak Dates**. The Peak Date report is displayed on screen.
3. If you want to print the report, select **File**, then select **Print** (or click on the **Print** icon).

Printing the Employees listing

This report displays all employee records that meet the criteria you select in the query box.

1. From the Main Menu, select **Listings**, then select **Employees**. The Query dialog box is displayed.
2. Enter the criterion that describes the employee records you wish to view.
3. Click **OK**. The report is displayed.
4. If you want to print the report, select **File**, then select **Print** (or click on the **Print** icon).

Printing the Periods of Contract listing

This report displays all employees on contract and their periods of contract that meet the criteria you select in the query box.

1. From the Main Menu, select **Listings**, then select **Periods of Contract**. The Query dialog box is displayed.
2. Enter the criterion that describes the employees you wish to view.
3. Click **OK**. The report is displayed.
4. If you want to print the report, select **File**, then select **Print** (or click on the **Print** icon).

Printing the Promotions listing

This report displays all employees who received promotions and that meet the criteria you select in the query box.

1. From the Main Menu, select **Listings**, then select **Promotions**. The Query dialog box is displayed.
2. Enter the criterion that describes the employees you wish to view.

3. Click **OK**. The report is displayed.
4. If you want to print the report, select **File**, then select **Print** (or click on the **Print** icon).

Printing Problems

If you have a printer memory problem or other problems relating to the print job, it may be because the EECRS default resolution setting is too high. To change this:

1. Click on the **Print** icon on the toolbar or select **File, Print**.
2. In the Print dialog box, click on **Printer**.
3. In the Printer Setup dialog box, click on **Setup**.
4. Click on the **Graphics** tab.
5. From the Resolution list, select the lowest setting (**75 dpi**).
6. Set the Dithering radio button to **Fine**.
7. Click **OK**.

Utilities

Importing and Exporting Data

How EECRS Works With Other Databases

If you already have extensive employee records stored in a previous version of EECRS or your in-house HR system, you can save a lot of time and effort by importing this data into EECRS instead of re-entering these records manually.

Similarly, you can export data from EECRS to other data-management applications.

For more information, see “Import Employee Data” and “Export Employee Data”.

Import Employee Data

Transferring data from EECRS v. 2.0, 2.1, 3.0 or 3.1

To get data from EECRS v. 2.0, 2.1, 3.0 or 3.1 to EECRS v. 4.0, do the following:

1. Confirm that your computer has the Windows date format set to YYYY-MM-DD. (See “Installation Process”.)
2. Open EECRS v. 2.0, 2.1, 3.0 or 3.1.
3. Select **Utilities, Export Employee Data**.

WARNING: Do NOT select “Export Internal Workforce Analysis Data”.

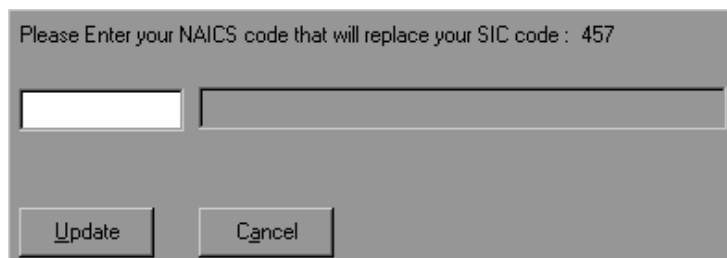
4. In the **Save In** dialog box, choose the folder you want to export your data to.
5. Name your file **employee.txt**. (This is a required file name for EECRS v. 4.0.)
6. Click **Save**.

Now that you have exported the EECRS v. 2.0, 2.1, 3.0 or 3.1 employee data, you have to import it into EECRS v. 4.0.

1. Install and start EECRS v. 4.0. A message will appear reminding you to backup your data before importing. Click **OK**.
2. Select **Utilities, Import**. A message will appear reminding you to backup your data before importing. Click **OK**.
3. Select the **EECRS 3.1** and click **Update** or **Overwrite**.

WARNING: If you select Overwrite, all of the data currently in EECRS v. 4.0 is deleted and replaced with the import file. If you select Update, all of the data currently in EECRS v. 4.0 remains. Existing records are updated and new records are added.

4. In the Select Text File dialog box, choose the file you just exported from EECRS v. 2.0, 2.1, 3.0 or 3.1.
5. Click **Open**. Employee data being imported from previous versions of EECRS contain Standard Industrial Classification (SIC) codes which must be replaced with NAICS codes. The following window will appear allowing you to enter the NAICS code:



The SIC code is displayed in the first line. Enter the appropriate NAICS code in the box provided, and then click **Update**. Each reference of the SIC code will automatically be replaced with the NAICS code selected. Once completed the Import Status screen appears.

6. Click on **Save Changes**.

NOTE: 1991 National Occupational Classification (NOC) codes no longer in the 2001 NOC table will produce data errors during the import process. (See “Data Errors”.) EECRS v. 4.0 uses the 2001 National Occupational Classification codes. For a list of changes to this coding system please see “Changes to NOC Codes”.

Importing From Your HR System

NOTE: Importing data into EECRS can be difficult. We strongly recommend that you read “Appendix A: Importing Data”. If you have any questions, contact us. (See “Getting Help”.)

If you have many employees, you may find it faster and more efficient to import data into EECRS from another system, rather than manually retyping the data. The process is described below.

1. Backup your old data. Make sure that the Windows Date format on your computer is set to YYYY-MM-DD. (See “Installation Process”.)

Use the EECRS Backup option to create a backup of the data in your system. (See “Backing up Your Data”.) If you have not entered any employee data in EECRS v. 4.0, this step is not required.

2. Create the required import files in text tab delimited format.

A text tab delimited file contains only characters (letters and numbers) - no formatting, no formulas, no graphics. Tab characters separate columns of data, and each row of data ends in a carriage return.

Refer to the chart below for specific details about the EECRS import files.

Required file name	File required?	File description	Contents
employee.txt	Yes	Appendix B	This file contains 1 row for every employee.
term.txt	Yes - if there are temporary or casual workers	Appendix B	This file contains one row for every temporary or casual employee's contract term. Only temporary or casual employees are included in this file. If a temporary or casual employee has two contract terms, there are two rows. Do not create this file if your company employed no temporary or casual employees during the reporting period.
promo.txt	No	Appendix B	This file contains one row for every promotion. If an employee was promoted twice, there are two rows. If an employee was not promoted, do not put in a row for that employee. Do not create this file if your company gave no promotions during the reporting period.
division.txt	No - division codes are optional.	Appendix B	This file contains one row for every division in your company. Do not create this file if your company is not using division codes. If you have included division codes in column 17 of the employee.txt import file and you do not include the division.txt file, the division table will be populated automatically by the system. You will have to input the descriptions after the import.
region.txt	No - region codes are optional.	Appendix B	This file contains one row for every region in your company. Do not create this file if your company is not using region codes. If you have included region codes in column 18 of the employee.txt import file, this file will be created for you during the import process. You will have to input the descriptions after the import.

3. Analyze and correct your import files, using the following rules:

- All import files must be named according to EECRS specifications in the chart above. You may use upper or lower case. Remember to include the .txt extension.
- All import files must be in the same directory or folder. You may choose any folder, but the files must all be together.
- All columns must exist and be in the order described in EECRS specifications (see “Appendix B: Import file specifications”).
- Some columns may be empty (or null), but the columns must exist. Remove any column labels.

EXCEPTION: Column 17 (division) and column 18 (region) are optional in the employee.txt file.

- All rows must contain data.
 - Do not include blank rows. Remove any row labels.
4. Run the EECRS import process:
- a) Backup the data already in EECRS before you start the import process. Make sure the Windows Date format on your computer is set to YYYY-MM-DD. (See “Installation Process”.)
 - b) From the EECRS Main Menu, select **Utilities**.
 - c) Select **Import**.
 - d) Click **OK** to continue.
 - e) Select **Text Tab Delimited File** from the Import Options dialog box.
 - f) Click **Update** or **Overwrite**.

WARNING: If you choose **Update**, the data from the import file is added to your existing data. Employee records that appear in both the import file and the existing data are replaced with the data from the import file. Employee records that appear only in the import file are added to the existing data. If you choose **Overwrite**, the data from the import file replaces all of your existing data. Your existing data, including any Division and Region information you may have entered in the Division and Region tables, is deleted and the new data is imported.

- g) Locate and select your **employee.txt** import file from the Select Text File window.
- h) Click **Open**.
- i) When the Import Status screen appears, click **Save Changes**.

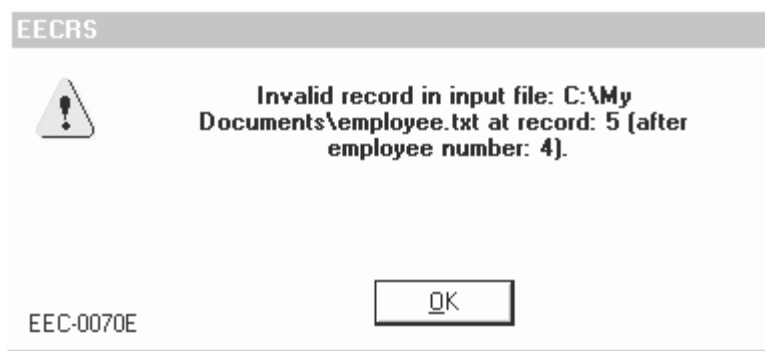
EECRS will import all of the files you have created unless it finds some errors in the data. EECRS issues two kinds of import errors: data errors and fatal errors. (See “Data Errors” and “Fatal Errors”.)

Fatal Errors

A fatal error occurs when there is a serious problem with one of the import files -- data does not fit the field specifications for the file, the file name is wrong, the file has an invalid format, a column is missing, etc.

A fatal error causes the Import process to fail, display an error message and stop immediately. EECRS rejects all of the import files. None of the import data from any file is imported into EECRS and none of the existing EECRS data is lost or changed.

A fatal error message looks like this:



To correct a fatal error, you must take note of the error message, then go back and correct the import files. In the example above, you would correct the fifth record in the employee.txt file, which is also the record right after the employee number 4 record.

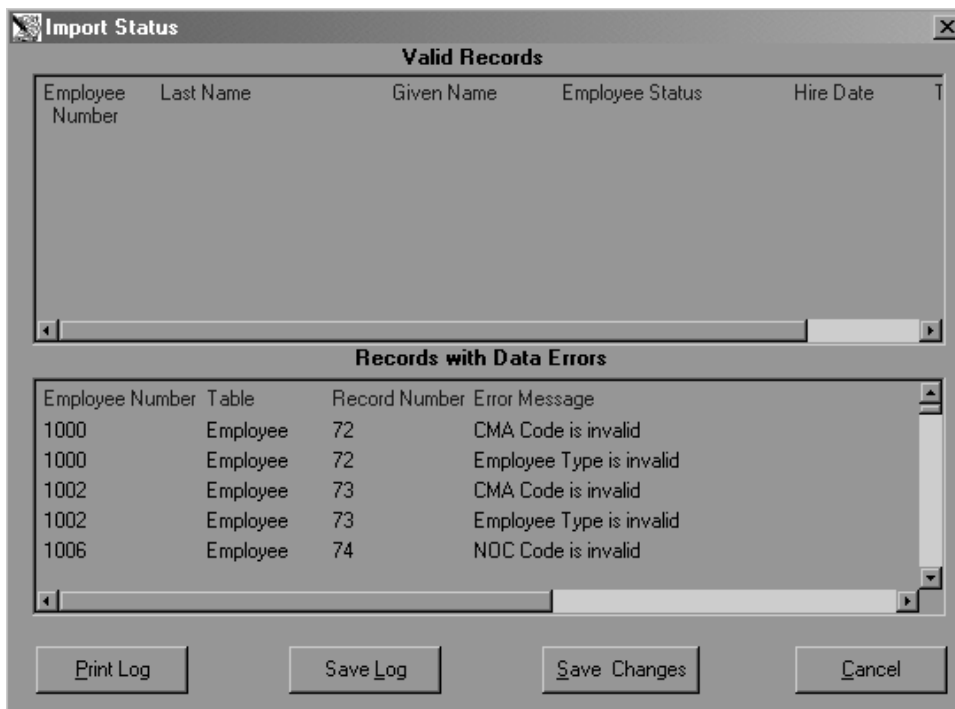
IMPORTANT: EECRS stops at the first fatal error. It does not show you all the errors in the files - just the first one. You can save time by checking your files carefully for other possible errors as you correct the first error.

Data Errors

Data errors occur when there is incorrect data in one or more records. For example, there may be incorrect NOC codes, NAICS codes, Employee Status codes or CMA codes in one or more records.

The import process lists all valid records in the top half of the Import Status dialogue box and any records with data errors in the bottom half of the dialogue box.

This is an example of an Import Status dialog box with several data errors:



At this point, you have two options:

1. Recommended option: Click the **Print Log**, click **Cancel**, correct all the data errors in the import files, then try the import process again.
2. Click **Save Changes** and click **Cancel**. All valid records in the top half of the dialogue box will be imported and the records with the data errors in the bottom half of the dialogue box must be entered manually into EECRS.

IMPORTANT: If you click **Save Changes**, the valid records are imported. If you click **Cancel**, no records are imported.

Export Employee Data

This feature helps you extract the information entered on your employees for use in another system. When you export from EECRS, the application creates five separate text tab delimited files: employee.txt, promo.txt, term.txt, division.txt and region.txt.

Procedure to export employee data:

1. Make sure the Windows Date format on your computer is set to YYYY-MM-DD. (See “Installation Process”.)
2. Choose **Utilities, Export Employee Data**.
3. In the Save As screen, select the drive and/or directory you want to save the data to.
4. In the File name field, type **employee.txt**. (You cannot name the file anything other than this.)
5. Click **Save**.

EECRS then generates the five files which you can open in a spreadsheet application to conduct your workforce analysis. Once the files have been read into the spreadsheet, you can aggregate your data by the number of employees by province, CMA, employment equity occupational group (EEOG), NOC code, employee status and gender. Then you can compare your employee data to the external workforce data, which is the major component of the workforce analysis. For more information on the steps to follow when conducting your workforce analysis, see Guideline 5, Guidelines of the *Employment Equity Act and Regulations*.

NOTE: The Export Utility includes the employee's Employment Equity Occupational Group (EEOG) code at the end of the employee.txt file. The EEOG code is not a required field for the Import Utility.

Export Internal Workforce Analysis Data

The *Export Internal Workforce Analysis Data* function is accessible under the Utilities menu in both the LEEP mode and the FCP mode. Essentially, this feature calculates the total workforce for each designated group at the 2-digit EEOG level and the 4-digit NOC level then creates text tab delimited files in a spreadsheet format. A file is created for the national counts and additional files are created for each province and CMA that exists in the employee data. All of the active

employee data is included in the calculations for the period specified by the user. These files can be read into an electronic spreadsheet such as Microsoft Excel and then manipulated to meet each individual's workforce analysis needs.

Export Internal Workforce Analysis Data

LEEP Mode

The screenshot shows a dialog box titled "Compile Internal Workforce Analysis Data". It contains two text input fields: "Period Start (YYYY/MM/DD)" with the value "2002/01/01" and "Period End (YYYY/MM/DD)" with the value "2002/12/31". At the bottom, there are two buttons: "OK" and "Cancel".

FCP Mode

The screenshot shows a dialog box titled "Compile Internal Workforce Analysis Data". It contains two text input fields: "Period Start (YYYY/MM/DD)" with the value "2002/01/01" and "Period End (YYYY/MM/DD)" with the value "2002/12/31". Below these fields is a section titled "Compile Criteria" which contains two dropdown menus: "Region" and "Division". At the bottom, there are two buttons: "OK" and "Cancel".

Procedure to export internal workforce analysis data:

1. Make sure the Windows Date format on your computer is set to YYYY-MM-DD.
(See "Installation Process".)
2. Choose **Utilities, Export Internal Workforce Analysis Data**.

3. Enter the required information into the Compile Internal Workforce Analysis Data dialog box.
4. In the Save As screen, select the drive and/or directory you want to save the data to.
5. Click **Save**.

NOTE: You must enter a date range. This could be for one day, a few days, a few months, a year or longer.

EECRS then creates text tab delimited files which you can open in a spreadsheet application to conduct your workforce analysis. Once the files have been read into the spreadsheet, you can manipulate your data to accommodate your analysis needs. For more information on the steps to follow when conducting your workforce analysis, see Guideline 5, Guidelines of the *Employment Equity Act and Regulations*.

Here is a sample text tab delimited file created by the **Export Internal Workforce Analysis Data** function:

national.txt

	A	B	C	D	E	F	G
1	eeog and noc unit group	total	women	aboriginal peoples	persons with disabilities	visible minorities	
2	Senior Managers	6	2	0	0	0	
3	0016 Senior Managers - Goods Pro	6	2	0	0	0	
4	Middle and Other Managers	10	1	0	1	0	
5	0112 Human Resources Managers	1	0	0	0	0	
6	0114 Other Administrative Services	1	1	0	0	0	
7	0611 Sales, Marketing and Advertis	1	0	0	0	0	
8	0713 Transportation Managers	6	0	0	1	0	
9	0722 Maintenance Managers	1	0	0	0	0	
10	Professionals	1	0	0	0	0	
11	2163 Computer Programmers	1	0	0	0	0	
12	Semi-Professionals and Technicians	0	0	0	0	0	
13	Supervisors	3	2	0	0	0	
14	1211 Supervisors, General Office an	3	2	0	0	0	
15	Supervisors: Crafts and Trades	23	1	1	0	0	
16	7216 Contractors and Supervisors, I	5	0	0	0	0	
17	7222 Supervisors, Motor Transport &	18	1	1	0	0	
18	Administrative and Senior Clerical P	1	0	0	0	0	
19	1222 Executive Assistants	1	0	0	0	0	
20	Skilled Sales and Service Personne	0	0	0	0	0	
21	Skilled Crafts and Trades Workers	27	0	0	0	0	
22	7265 Welders	1	0	0	0	0	
23	7321 Motor Vehicle Mechanics, Tec	25	0	0	0	0	
24	7322 Motor Vehicle Body Repairers	1	0	0	0	0	

NOTE: (for LEEP employers):

Temporary employees will be included regardless of their representation in the total workforce and regardless of the number of weeks worked.

Generate Workforce Analysis Data

The *Generate Workforce Analysis Data* function has been added to EECRS v. 4.0 and is accessible under the Utilities menu in both the LEEP mode and the FCP mode. Essentially, this feature produces the “Detailed” tables, one for each of the four designated groups (women, Aboriginal peoples, members of visible minorities and persons with disabilities), and the “Summary” table as prescribed in the Guideline 5: Workforce Analysis document. In order to generate the Summary and Detailed tables, you will be required to enter information. Default selections will be provided for every entry but you will have the capability to enter a different selection. If you DO change the defaults, you are urged to record the reasons for selecting a different occupational group, NOC level, recruitment area and/or recruitment location. This information will help to finalize your workforce analysis report. The EECRS will then use this information to:

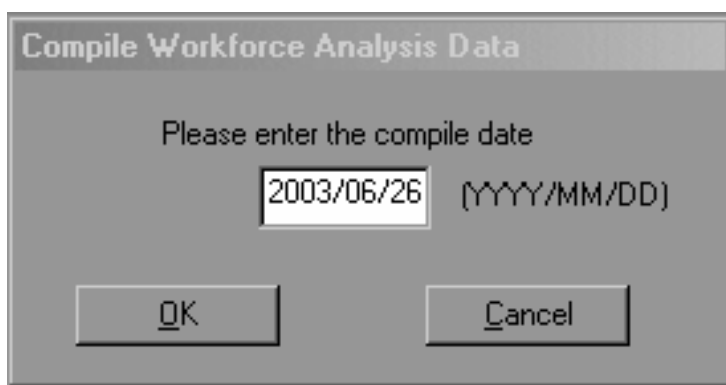
- (1) Calculate your internal workforce for each designated group at the 2-digit EEOG level and the 4-digit NOC level by National, Provincial and CMA level. All active employee data is included in the calculations for the date specified by the user.
- (2) Obtain the external percentages from the 2001 Census of Canada data for women, Aboriginal peoples and members of visible minorities and from the 2001 Participation and Activity Limitation Survey (PALS) for persons with disabilities. The data for women, Aboriginal peoples and members of visible minorities is available by EEOG and NOC Unit Group at the National, Provincial and CMA levels. The data for persons with disabilities is available by EEOG at the National and Provincial level.
- (3) Calculate the expected representation and gaps for each designated group.
- (4) Generate the Summary and Detailed tables.

Once the tables have been generated, you can save and/or print them.

Procedure to generate workforce analysis data:

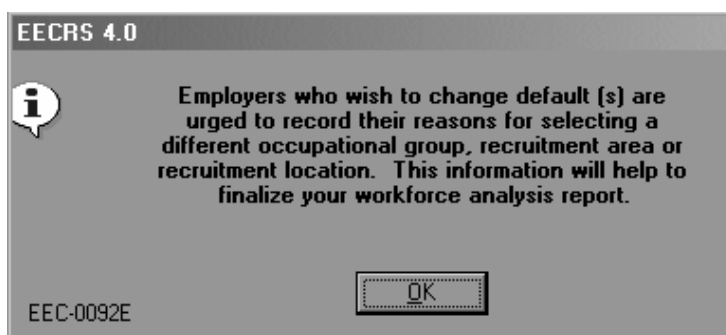
1. Make sure the Windows Date format on your computer is set to YYYY-MM-DD. (See “Installation Process”.)
2. From the Main Menu, select **Utilities, Generate Workforce Analysis Data.**

3. Enter the compile date into the Compile Workforce Analysis Data dialog box. The current date is set as the default. This is the dialog box:



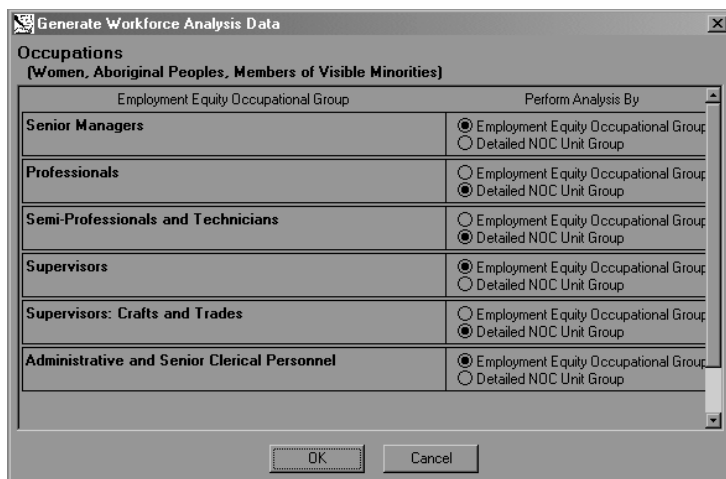
The dialog box is titled "Compile Workforce Analysis Data". It contains the text "Please enter the compile date". Below this text is a text input field containing "2003/06/26" and a label "(YYYY/MM/DD)". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

4. Click **OK**.
5. The following message box will appear. Click **OK**.



The message box is titled "EECRS 4.0". It contains an information icon (a lowercase 'i' in a circle) and the following text: "Employers who wish to change default (s) are urged to record their reasons for selecting a different occupational group, recruitment area or recruitment location. This information will help to finalize your workforce analysis report." At the bottom of the message box is an "OK" button. In the bottom left corner, the text "EEC-0092E" is displayed.

6. Once EECRS has compiled your internal workforce, the first screen to appear is the **Generate Workforce Analysis Data – Occupations (Women, Aboriginal People, Members of Visible Minorities)**, listing all the Employment Equity Occupational Groups (EEOGs) present in your internal workforce.



The dialog box is titled "Generate Workforce Analysis Data" and has a subtitle "Occupations (Women, Aboriginal Peoples, Members of Visible Minorities)". It contains a table with two columns: "Employment Equity Occupational Group" and "Perform Analysis By". The table lists six occupational groups, each with two radio button options: "Employment Equity Occupational Group" and "Detailed NOC Unit Group". The "Detailed NOC Unit Group" option is selected for all groups. At the bottom of the dialog box are "OK" and "Cancel" buttons.

Employment Equity Occupational Group	Perform Analysis By
Senior Managers	<input checked="" type="radio"/> Employment Equity Occupational Group <input type="radio"/> Detailed NOC Unit Group
Professionals	<input type="radio"/> Employment Equity Occupational Group <input checked="" type="radio"/> Detailed NOC Unit Group
Semi-Professionals and Technicians	<input type="radio"/> Employment Equity Occupational Group <input checked="" type="radio"/> Detailed NOC Unit Group
Supervisors	<input checked="" type="radio"/> Employment Equity Occupational Group <input type="radio"/> Detailed NOC Unit Group
Supervisors: Crafts and Trades	<input type="radio"/> Employment Equity Occupational Group <input checked="" type="radio"/> Detailed NOC Unit Group
Administrative and Senior Clerical Personnel	<input checked="" type="radio"/> Employment Equity Occupational Group <input type="radio"/> Detailed NOC Unit Group

The EEOGs are listed in the column on the left side of the screen and the parameters for analysis are listed in the column on the right side of the screen under the heading “Perform Analysis By.” Select the parameters for analysis for each EEOG by clicking on either **Employment Equity Occupational Group** or **Detailed NOC Unit Group**. The selections you see on the screen are the default selections. You may override any of the default selections by clicking on another choice. For example, for Senior Managers the default for analysis is by Employment Equity Occupational Group. If for any reason you would like to perform the analysis by Detailed NOC Unit Group you may select that.

NOTE: Each Employment Equity Occupational Group has a default “Perform Analysis By” selection. You may change the default value but you should be prepared to provide an explanation.

7. Click **OK**.
8. The **Generate Workforce Analysis Data – Geographical Location of Recruitment (Women, Aboriginal People, Members of Visible Minorities)** screen is the second screen to appear.

Generate Workforce Analysis Data

Geographical Location of Recruitment
(Women, Aboriginal Peoples, Members of Visible Minorities)

☐ Other Manual Workers

☐ Skilled Crafts and Trades Workers ☐ Clerical Personnel ☐ Intermediate Sales and Service Personnel ☐ Semi-Skilled Manual Workers ☐ Other Sales and Service Personnel

☐ Middle and Other Managers ☐ Professionals ☐ Semi-Professionals and Technicians ☐ Supervisors ☐ Supervisors: Crafts and Trades ☐ Administrative and Senior Clerical Personnel

Recruitment Area
☒ National ☐ Provincial ☐ CMA

Perform Analysis By	Internal Location	Recruitment Location
Employment Equity Occupational Group	National	National

Accept Selections Return to Default < Back Next > Cancel

Each of the Employment Equity Occupational Groups present in your internal workforce will appear as a separate tab across the top of the window. Click the first tab and select the **Recruitment Area** and the **Recruitment Location** from the pull-down menu.

NOTE: The Recruitment Area is the geographical area from which you would normally be expected to draw employees, taking into consideration the skill levels and educational requirements for the job.

9. Once you have made the selections for that EEOG (i.e. Senior Managers), click on the **Accept Selections** button. A check mark will appear in the box beside that EEOG. If you have made changes to the default selections but would like to return to the preset defaults, click on the **Return to Default** button.

NOTE: Although default selections are provided for the **Recruitment Area** and the **Recruitment Location**, you may select a different Recruitment Area or Recruitment Location. However, if you DO change a default you should be prepared to provide an explanation.

10. Repeat the **Recruitment Area** and **Recruitment Location** selection process for each EEOG tab.
11. Once a check mark appears beside each EEOG, click **Next>** to produce the **Summary Selection Table (Women, Aboriginal Peoples and Members of Visible Minorities)**. You may click on **<Back** anytime during the process to return to the previous screen.
12. Once you have viewed the **Summary Selection Table (Women, Aboriginal Peoples and Members of Visible Minorities)**, click **Next>**. The **Generate Workforce Analysis Data – Geographical Location of Recruitment (Persons with Disabilities)** screen will appear.
13. Repeat steps eight to ten to complete the selection process for Persons with Disabilities.
14. Once a check mark appears beside each EEOG, click **Next>** to produce the **Summary Selection Table (Persons with Disabilities)**.
15. On the **Summary Selection Table (Persons with Disabilities)** screen, you have the option to print or save the:
 - a. four Detailed tables
 - b. Summary table
 - c. Summary Selection Table (Women, Aboriginal Peoples and Members of Visible Minorities)
 - d. Summary Selection Table (Persons with Disabilities).
16. To generate and save the documents itemized in step 15, click **Save>**. The following Save As dialog box will appear:



The seven files will be saved in HTML format and the names of the files will be saved as follows:

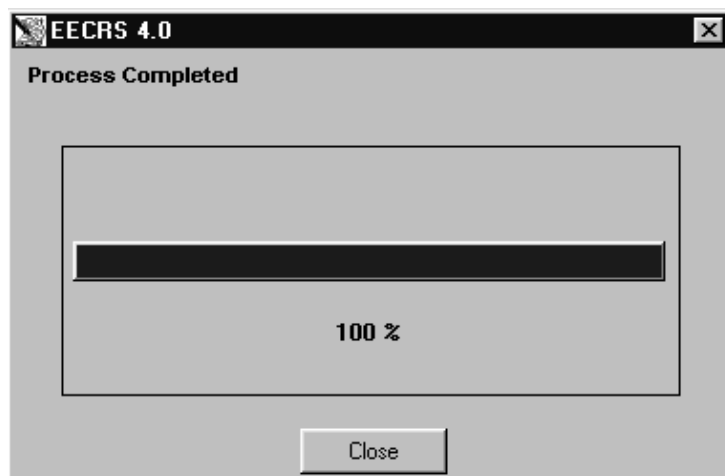
- d_wfa_detail_abo.htm
- d_wfa_detail_vis_min.htm
- d_wfa_detail_pwd.htm
- d_wfa_detail_women.htm

- d_wfa_summary_table.htm
- d_summary_selection_table.htm
- d_summary_selection_table_pwd.htm

In the Save in: field, select the drive and/or directory you want to save the documents to.

17. Click **Save**.

18. To generate and print the documents itemized in step 15, click **Print>**. A series of progress windows will appear followed by the Process Completed window:



19. Click **Close**.

Copy Forms 1 to 6

LEEP mode

Use this function to copy the forms generated in your most recent compile to your hard disk or to a diskette. The diskette can then be submitted to meet your reporting requirements (the report can also be submitted via the Internet at the following address: ee-eme@hrdc-drhc.gc.ca).

Procedure to copy Forms 1 to 6:

1. From the Main Menu, select **Utilities, Copy Forms 1-6**. A message appears reminding you to include your narrative report with the statistical portion (Forms 1-6) of your report.
2. Click **OK**.
3. In the Save As dialog box, select the drive and folder you want to save your data to.
4. Name your file **forms.txt**. (You cannot name your file anything other than this.)
5. Click **OK**.

FCP mode

This function is not available in FCP mode, as FCP employers do not submit Forms 1-6.

Global Province Replacement

If you are transferring all employees from one province or CMA to another province or CMA, use the Global Province Replacement function.

Procedure to change provinces for groups of employees:

1. From the Main Menu, select **Utilities, Global Province Replacement**.
2. Choose the province or CMA from which you want to move employees.
3. Select the province or CMA you will be moving them to.
4. Click **OK**.

Global NAICS Code Replacement

If you are transferring all employees from one NAICS code to another NAICS code, use the Global NAICS Code Replacement function.

Procedure to change NAICS codes for groups of employees:

1. From the Main Menu, select **Utilities, Global NAICS Replacement**.
2. Choose the NAICS code from which you want to move employees.
3. Select the NAICS code you will be moving them to.
4. Click **OK**.

Global Division Code Replacement

FCP mode

If you are transferring all employees from one division to another division, use the Global Division Code Replacement function.

Procedure to change division codes for groups of employees:

1. From the Main Menu, select **Utilities, Global Division Replacement**.
2. Choose the division code from which you want to move employees.
3. Select the division code you will be moving them to.
4. Click **OK**.

Global Region Code Replacement

FCP mode

If you are transferring all employees from one region to another region, use the Global Region Code Replacement function.

Procedure to change region codes for groups of employees:

1. From the Main Menu, select **Utilities, Global Region Replacement**.
2. Choose the region code from which you want to move employees.
3. Select the region code you will be moving them to.
4. Click **OK**.

Change Employee Number

Procedure to change an employee number:

1. From the Main Menu, select **Utilities, Change Employee Number**.
2. Type in the employee's current number.
3. Click **OK**. A box with the employee's record will appear, with the employee number highlighted.
4. Type in the new employee number.
5. Click **OK**.

Backup/Restore

You should backup your data any time you make changes in EECRS. This protects you from losing your data in case of a hard disk crash or other equipment failures. To do this, use the Backup/Restore option in Utilities.

Backing up Your Data

Procedure to backup your data:

1. Make sure the Windows Date format on your computer is set to YYYY-MM-DD. (See "Installation Process".)
2. From the Main Menu, select **Utilities, Backup/Restore, Backup**.
3. Select the drive you want to save your data to. (We suggest you backup to a floppy disk.)
4. Type in a file name.
5. Click **Save**.

EECRS will save your data to a backup file. If your hard disk ever crashes, you will need to re-install EECRS. To access your backed-up data, you have to restore it. (See "Restoring your data".)

NOTE: Incorporating the date in the file name will help keep track of backups, i.e. EEMay99.txt.

Restoring Your Data

Procedure to restore your data:

1. Make sure the Windows Date format on your computer is set to YYYY-MM-DD. (See “Installation Process”.)
2. From the Main Menu, select **Utilities, Backup/Restore, Restore**.
3. Select the drive and file that contain your backed-up data.
4. Click **Restore**. EECRS will restore your backed-up data.

Delete Old Promotions and Terms

Sometimes an employee's record will contain many old promotions and work terms that you do not need to keep.

Procedure to delete old promotions and terms:

1. From the Main Menu, select **Utilities, Delete Old Promotions and Terms**.
2. Type in a year. All promotions and terms data before the year entered will be deleted.
3. Click **OK**. EECRS will delete all promotions and terms that have occurred before the year you specify.

NOTE TO EMPLOYERS: Although the Employment Equity Regulations require you to retain employee records for at least two years, we strongly recommend to print out and retain promotion records for a period of 3-5 years.

Batch Delete Employees

Use Batch Delete Employees when you want to delete groups of employee records by Province, CMA, Employee Status and the year in which they were terminated. You can also delete all your employee records.

FCP mode

In FCP mode you can also delete groups of employee records by Division and Region.

Procedure to batch delete employee records:

1. From the Main Menu, select **Utilities, Batch Delete Employees**.
2. In the Query dialog box, type in the criteria you want to delete by.
3. Click **OK**.
4. EECRS will ask if you are sure you want to delete these employee records. Click **Yes**. EECRS will delete all the employee records you specify.

NOTE TO EMPLOYERS: Although the Employment Equity Regulations require you to retain employee records for at least two years, we strongly recommend to print out and retain termination records for a period of 3-5 years.

Support Tables

You can use the support tables to look up codes for the Provinces, the Census Metropolitan Areas (CMAs), the North American Industrial Classification System (NAICS), the Employment Equity Occupational Groups (EEOGs) and the 2001 National Occupational Classification (NOC) - as well as information on Employee Status and Salary Ranges - without leaving EECRS.

You can view the tables on the screen or you can print them for future reference. You can also manipulate the tables to view and/or print only the information you are interested in. (See “Printing the Support Tables”.)

Province Table

To view the Province table:

From the Main Menu, go to **Utilities, View Support Tables** and select **Province Table**.

CMA Table

To view the CMA table:

From the Main Menu, go to **Utilities, View Support Tables** and select **CMA Table**.

NAICS Table

To view the NAICS table:

From the Main Menu, go to **Utilities, View Support Tables** and select **NAICS Table**.

EEOG Table

To view the EEOG table:

From the Main Menu, go to **Utilities, View Support Tables** and select **Occupational Group Table**.

2001 NOC Table

To view the 2001 NOC table:

From the Main Menu, go to **Utilities, View Support Tables** and select **NOC Table**.

Employee Status List

To view the Employee Status list:

From the Main Menu, go to **Utilities, View Support Tables** and select **Employee Status Table**.

Salary Table

To view the Salary table:

From the Main Menu, go to **Utilities, View Support Tables** and select **Salary Table**.

Division Table

To view the Division table:

From the Main Menu, go to **Data** and select **Division**.

Region Table

To view the Region table:

From the Main Menu, go to **Data** and select **Region**.

Printing the Support Tables

Procedure to print a support table:

1. When you are viewing a support table, click on the **Print** icon or select **File, Print**.
2. When the Print dialog box comes up, click **OK**.

NOTE: Before printing the NOC or NAICS tables, we recommend that you test-print a single page before you print the entire table. This way, you can see whether the tables need to be printed in portrait mode or landscape mode. By adjusting column widths, you can reduce the number of printed pages.

Adjusting Table Column Widths

Adjusting table column widths is similar to adjusting column widths in a spreadsheet.

Procedure to adjust column widths:

1. Position the mouse arrow on a column border. The mouse arrow changes into a left-right arrow.
2. Hold the left mouse button down and drag the column border to where you want.
3. Release the mouse button.

Hiding Table Columns

You can hide support table columns during viewing and printing.

Procedure to hide columns in a table:

1. Position the pointer on the column's right-hand border.
2. Click once on the border and hold the mouse button down. A left-right arrow will appear.
3. Holding the mouse button down, drag the column border to the left as far as the next column's right-hand border.
4. Release the mouse button.
5. To make the column reappear, drag the visible column's right-hand border back to the right.

Appendix A : Importing Data

Before You Import

IMPORTANT: Always make a copy of your existing data before importing another file.

If you are a current user of EECRS, export your data as follows:

1. Make sure the Windows Date format on your computer is set to YYYY-MM-DD. (See “Installation Process”.)
2. Open EECRS v. 4.0.
3. From the Main Menu, select **Utilities, Export Employee Data**.
4. Select the drive you want to export your data to. We suggest you export to a floppy disk.
5. Type in the file name **employee.txt**.
6. Click **Save**.

Creating import files with Microsoft Excel

If you want to import (rather than manually re-type) data from an existing system into EECRS v. 4.0, you must create text tab delimited files. You can use a word processing package, a database system, or a spreadsheet - as long as your software can create the specific file format.

In the following procedure, we explain how to use Microsoft Excel to create the import files for EECRS.

Procedure to use Microsoft Excel to create import files for EECRS:

You will repeat this procedure three times to create three files - employee.txt, promo.txt, and term.txt. You may optionally create region.txt and division.txt as well.

Step 1. Open an empty MS Excel worksheet

1. Start Microsoft Excel.
2. Open an empty worksheet.

Step 2. Format the worksheet as 'text'

All the cells in the worksheet must be formatted as 'text'. Why? Because leading zeros must be stored (for example, NOC code 0012) and the dates must be stored in the format YYYY/MM/DD. As well, if you do not format as text, the data may get chopped.

1. Select all the cells in the worksheet. (Click the grey rectangle in the upper-left corner of the worksheet where the row and column headings meet.)
2. From the Main Menu, select **Format**, then select **Cells**.
3. In the Format Cells dialog box, click on the **Number** tab.
4. From the Category list, select **Text**.
5. Click **OK**.

Step 3. Open the external data file

For example, if you have a file from your Human Resources department with the data for the employee.txt file, open it now.

1. From the Main Menu, select **File**, then select **Open**.
2. Using the folders and files lists, highlight the file you wish to import.
3. Click **Open**.

Step 4. Use the MS Excel Import Wizard

1. On the first screen, select the data type of your import file. Click **Next**.
2. On the second screen, select the data delimiters in your import file. Click **Next**.
3. The third screen displays the options to set the data format for the columns. Highlight all the columns in the data preview box, then select **Text** from the list of Column data formats. Click **Finish**.

Step 5. Analyze and correct data in the worksheet

The import file you create must be properly structured and the data must be inputted correctly.

1. You may temporarily insert a row at the top of the worksheet and type in the column headings. This is for your convenience while editing; you will delete this row before you save the file.
2. Move the columns into the required order, if they are not already ordered correctly. For example, in the employee.txt file, the employee number must be in the first column, the CMA code in the second, and so on.
3. If a column is missing, insert an empty column. If there is an extra column, delete it. Special note for the employee.txt file: columns 17 and 18 of the employee file are NOT required. Those columns are imported only if they contain data.
4. Delete all empty rows. Empty rows are not allowed in the import files.

5. Confirm that rows and columns contain required data: Check the file descriptions in “Appendix B: Import file specifications” to see if the column information is required. For example, the last name column can be blank, because it is not required. The employee number column is required, so every row in that column must have an entry.
6. Confirm that rows and columns contain valid data: For example, dates must be entered as YYYY/MM/DD (Example: 2003/11/30). Some fields must contain Y (yes) or N (no). Do not use T (true). Be sure that the employee number is correct in every file.
7. Finally, remove the row of column headings or labels if you have inserted them (see no. 1 in this step). EECRS will treat a row of headings as data, and will reject the whole file.

Step 6. Save the worksheet as Text (Tab delimited) (*.txt)

For EECRS import, you must save the worksheet in the text tab delimited format. Microsoft Excel workbooks are normally saved in their native format as *.xls files.

1. From the File menu, select **Save As**.
2. In the Save In field, select the folder of your choice. All of your EECRS import files must be saved in the same directory/folder.
3. In the File name field, type in the name of the file. (See “Appendix B: Import file specifications” for the list of required file names.) EECRS will only recognize the required file names.
4. From the Save as Type drop-down list, select **Text (Tab delimited) (*.txt)**
5. Click **OK**. A warning box will remind you that this file format, Text (Tab delimited), does not support workbooks with multiple sheets. You have created only a single sheet, so this is not a problem.
6. Click **OK**. The new file is created.

Step 7. Close the worksheet

You must close the MS Excel file you just created; EECRS will not let you import an active file.

1. From the Main Menu, select **File**, then select **Close**. A warning box will ask you if you want to save it as a MS Excel spreadsheet. You want to close the file in its existing Text (Tab delimited) format, without saving changes.
2. Click **No**. The worksheet is closed.

Step 8. Create term.txt

Repeat steps 1 to 7 to create term.txt. Do not create term.txt if your company had no temporary or casual workers.

Step 9. Create promo.txt

Repeat steps 1 to 7 to create promo.txt. Do not create promo.txt if your company gave no promotions.

Step 10. Create division.txt

Repeat steps 1 to 7 to create division.txt. Do not create division.txt if you are not using division codes.

Step 11. Create region.txt

Repeat steps 1 to 7 to create region.txt. Do not create region.txt if you are not using region codes.

Step 12. Exit Microsoft Excel

When you are done, exit Microsoft Excel.

You are now ready to import files. See “Importing From Your HR System”.

Sample import files

LEEP mode

Here are 3 sample import files created for a fictitious LEEP employer:

employee.txt

Employee number	CMA code	Province code	NOC code	NAICS code	Employee status	Comment	Gender	Last name	Given name	Salary	Aboriginal	Visible minority	Disabled	Hire date	Termination date
111	06	10	0112	5133	02		M	Shand	Harold	34000	N	N	Y	1998/01/01	1998/12/31
222	04	11	0015	5133	01		F	Tremblay	Michelle	44000	N	Y	N	1998/01/01	
333	03	12	1111	5133	03		M	Smith	Maxwell	40000	N	N	N		
444	02	18	1222	5133	03		M	Brown	Jim	40000	Y	N	N		
555	07	15	0213	5133	05		F	Taylor	Jane	40000	N	N	N		
666	06	10	0111	5133	04		F	Wang	Ping	42500	N	N	N	1998/11/02	

term.txt

Employee number	Term number	Start date	End date	Termination date
333	1	1998/02/15	1998/12/31	1998/05/31
444	1	1998/03/01	1998/06/07	
555	1	1998/01/01	1998/01/15	
555	2	1998/02/20	1998/02/25	

promo.txt

Employee number	Promotion number	Promotion date
222	1	1998/04/15
111	1	1998/05/01

FCP mode

Here are 5 sample import files created for a fictitious FCP employer:

employee.txt

Employee number	CMA code	Province code	NOC code	NAICS code	Employee status	Comment	Gender	Last name	Given name	Salary	Aboriginal	Visible minority	Disabled	Hire date	Termination date	Division code	Region code
111	06	10	0112	5133	02		M	Shand	Harold	34000	N	N	Y	1998/01/01	1998/12/31	COMM	WEST
222	04	11	0015	5133	01		F	Tremblay	Michelle	44000	N	Y	N	1998/01/01		MKTG	EAST
333	03	12	1111	5133	03		M	Smith	Maxwell	40000	N	N	N			MKTG	CTRL
444	02	18	1222	5133	03		M	Brown	Jim	40000	Y	N	N			ACTG	CTRL
555	07	15	0213	5133	05		F	Taylor	Jane	40000	N	N	N			LEGL	WEST
666	06	10	0111	5133	04		F	Wang	Ping	42500	N	N	N	1998/11/02		LEGL	EAST

term.txt

<i>Employee number</i>	<i>Term number</i>	<i>Start date</i>	<i>End date</i>	<i>Termination date</i>
333	1	1998/02/15	1998/12/31	1998/05/31
444	1	1998/03/01	1998/06/07	
555	1	1998/01/01	1998/01/15	
555	2	1998/02/20	1998/02/25	

promo.txt

<i>Employee number</i>	<i>Promotion number</i>	<i>Promotion date</i>
222	1	1998/04/15
111	1	1998/05/01

division.txt

<i>Division code</i>	<i>Description (English)</i>	<i>Description (French)</i>
COMM	Communications	Communications
MKTG	Marketing	Marketing
ACTG	Accounting	Comptabilité
LEGL	Legal	Service juridique

region.txt

<i>Region code</i>	<i>Description (English)</i>	<i>Description (French)</i>
WEST	West	Ouest
EAST	East	Est
CTRL	Central	Centre

Appendix B: Import File Specifications

employee.txt

Field name	Column number	Field type	Number of characters	About this field	Required field?
Employee number	1	character	maximum 9	must be unique-no duplicate numbers	Yes
CMA code	2	number	2	from valid list	For LEEP employers, this field is required if the employee works in one of the 8 designated CMAs.
Province	3	number	2	from valid list	Yes
NOC code	4	number	4	from valid list	Yes
NAICS code	5	number	4	from valid list	Yes
Employee status code	6	number	2	from valid list	Yes
Comment	7	character	maximum 50		No
Gender	8	letter	1	M (male) or F (female)	Yes
Last name	9	letter	maximum 20	Letters only	No
Given name	10	letter	maximum 15	Letters only	No
Salary	11	number	maximum 8	Whole numbers only; no dollar signs.	Yes. Minimum salary is 1; zero is not an acceptable salary.
Aboriginal	12	letter	1	Y (yes) or N (no)	Yes
Visible minority	13	letter	1	Y (yes) or N (no)	Yes
Disabled	14	letter	1	Y (yes) or N (no)	Yes
Hire date	15	character	10	YYYY/MM/DD (include forward slashes)	Yes if employee is full- or part-time or other. Leave blank if employee is temporary or casual.
Termination date	16	character	10	YYYY/MM/DD (include forward slashes)	No (only fill out if employee is full- or part-time or other AND has been terminated)
Division code	17	character	4		No
Region code	18	character	4		No

How to Use the Field Specifications

The field names run across the top of your text tab delimited file. The first field is the Employee number. The next field is the CMA, and so on. The field specifications tell you what the data in each field should look like. For example, the Gender field is a letter field (which you can see from Field type). Under Number of characters, you will see that you can only enter one character in this field. And under About This Field, you can see that you can only enter an M (if the employee is a male) or an F (if the employee is a female).

Similarly, for the Salary field, you will see that it is a number field. This means you cannot use letters, dollar signs, decimal points or other symbols. EECRS will allow up to eight digits in this field, i.e. a salary of up to 99999999.

Remember that the fields are represented by columns in the actual text tab delimited file and all fields are separated by tabs.

FCP mode

Division codes and region codes are available, but not required, in FCP mode. There are two methods of importing these codes:

1. Input codes into columns 17 and 18 of the employee.txt file. Create both division.txt and region.txt with all of your codes, then run the Import option to import all the files.
2. Input codes into columns 17 and 18 of the employee.txt file. Do NOT create the division.txt or the region.txt, then run the Import option. EECRS will create the division code table and the region code table based on the codes you input into columns 17 and 18 of the employee.txt file. You should then add descriptions to the two tables.

Division codes and region codes are not used in LEEP mode, however, if you input codes into columns 17 and 18 of the employee.txt file, those codes are imported and the division and region tables are created. You must go into FCP mode to add the descriptions.

term.txt

Field name	Column number	Field type	Number of characters	About this field	Required field?
Employee number	1	character	maximum 9	Employee number must exist in the employee.txt file	Yes
Term number	2	number	maximum 4	Chronologically, one number at a time	Yes
Start date	3	character	10	YYYY/MM/DD (include forward slashes)	Yes
End date	4	character	10	YYYY/MM/DD (include forward slashes)	Yes
Termination date	5	character	10	YYYY/MM/DD (include forward slashes)	No

promo.txt

Field name	Column number	Field type	Number of characters	About this field	Required field?
Employee number	1	character	maximum 9	Employee number must exist in the employee.txt file	Yes
Promotion number	2	number	maximum 4	Chronologically, one number at a time	Yes
Promotion date	3	character	10	YYYY/MM/DD (include forward slashes)	Yes

division.txt

FCP mode

Field name	Column number	Field type	Number of characters	About this field	Required field?
Division code	1	character	maximum 4	must be unique-no duplicate codes	Yes
Description (English)	2	character	maximum 50		No
Description (French)	3	character	maximum 50		No

region.txt

FCP mode

Field name	Column number	Field type	Number of characters	About this field	Required field?
Region code	1	character	maximum 4	must be unique-no duplicate codes	Yes
Description (English)	2	character	maximum 50		No
Description (French)	3	character	maximum 50		No

Appendix C : List of Codes

Census Metropolitan Area (CMA) Codes

Only codes 01 – 08 are designated under the *Employment Equity Act*.

Code	Description	Code	Description
01	Calgary	64	London
02	Edmonton	65	Windsor
03	Halifax	66	Sudbury
04	Montréal	67	Thunder Bay
05	Regina	70	Saskatoon
06	Toronto	72	Abbotsford NEW!
07	Vancouver	74	Victoria
08	Winnipeg	85	Alberta less CMAs
50	St. John's	86	British Columbia less CMAs
52	Saint John	87	Manitoba less CMA
53	Chicoutimi-Jonquière	88	New Brunswick less CMA
54	Québec	89	Nova Scotia less CMA
55	Sherbrooke	90	North Wwest Territoryies
56	Trois-Rivières	91	Newfoundland less CMA
57	Kingston NEW!	92	Nunavut
58	Ottawa-Hull	93	Ontario less CMAs
59	Oshawa	94	Prince Edward Island
61	Hamilton	95	Québec less CMAs
62	St. Catharines-Niagara	96	Saskatchewan less CMA
63	Kitchener	97	Yukon Territory

Province Codes

Code	Description
10	Ontario
11	Quebec
12	Nova Scotia
13	New Brunswick
14	Manitoba
15	British Columbia
16	Prince Edward Island
17	Saskatchewan
18	Alberta
19	Newfoundland
20	Yukon
21	Northwest Territories
22	Nunavut
98	Foreign

Employee Status Codes

Code Description

01	Full Time
02	Part Time
03	Temporary
04	Other
05	Casual

Changes to NOC Codes

NOTE: In previous versions of EECRS, NOC code **0000 – Not Defined** was accepted during the import process and in the Employee Details screen. In version 4.0, this is no longer true. A value of **0000 – Not Defined** will cause a data error during the import process, therefore you must change all NOC codes **0000** with a valid 2001 NOC code.

New Unit Groups	
2171 Information Systems Analysts and Consultants	New- Information technology group includes some occupations that were classified in former unit group 2162, Computer Systems Analysts
2172 Database Analysts and Data Administrators	New- Information technology group at the professional skill level
2173 Software Engineers	New- Includes some occupations that were classified in former unit group 2147, Computer Engineers
2174 Computer Programmers and Interactive Media Developers	New- Includes some occupations that were classified in former unit group 2163, Computer Programmers
2175 Web Designers and Developers	New- Information technology group at the professional skill level
2281 Computer and Network Operators and Web Technicians	New- Information technology group at the technical skill level that includes occupations classified in former unit group 1421, Computer Operators
2282 User Support Technicians	New- Information technology group at the technical skill level
2283 Systems Testing Technicians	New- Information technology group at the technical skill level
Modified or Deleted Unit Groups	
0721 Facility Operation and Maintenance Managers	Modified- Now includes occupations from former unit group 0722
0722 Maintenance Managers	Deleted- Occupations now included in unit group 0721
1411 General Office Clerks	Modified- Now includes occupations from former unit group 1412
1412 Typists and Word Processing Operators	Deleted- Occupations now included in unit group 1411
1421 Computer Operators	Deleted- Occupations now included in new information technology unit group 2281
2162 Computer Systems Analysts	Deleted- Occupations now included in new minor group 217 for information technology occupations at the professional level

2163 Computer Programmers	Deleted- Occupations now included in minor group 217
3223 Dental Technologists, Technicians and Laboratory Bench Workers	Modified- Now includes occupations from former unit group 3412.
3412 Dental Laboratory Bench Workers	Deleted- Occupations now included in unit group 3223.
3414 Other Assisting Occupations in Support of Health Services	Modified- Now includes occupations from former unit group 6631
4214 Early Childhood Educators and Assistants	Modified- Now includes occupations from former unit group 6473
6443 Casino Operators	Modified- Amusement attraction operators, formerly part of this group, now included in group 6671
6473 Early Childhood Educator Assistants	Deleted- Occupations now included in unit group 2414
6631 Elemental Medical and Hospital Assistants	Deleted- Occupations now included in unit group 3414
6641 Food Counter Attendants, Kitchen Helpers and Related Occupations	Modified- Now includes occupations from former unit group 6642
6642 Kitchen and Food Service Helpers	Deleted- Occupations now included in unit group 6641
6671 Operators and Attendants in Amusement, Recreation and Sport	Modified- Amusement attraction operators, formerly from unit group 6643, now included in here.
7265 Welders and Related Machine Operators	Modified- Now included includes occupations from former unit group 9515.
9515 Welding, Brazing and Soldering Machine Operators	Deleted- Occupations now included in unit group 7265

Appendix D: Frequently Asked Questions

1. What is the password?

The password is: EECRS (not case sensitive.)

2. If an employee has not answered Yes or No to a self-identifying question, what should I enter in the designated group fields (options are Y for yes and N for no)?

Enter N for no because the software only counts the Y's.

3. Is there a way in the Employee Information screen to capture whether an employee has submitted his self-identifying questionnaire?

As described in the EECRS Version 4.0 User's Guide, the Division and Region tables were provided to use as a tool for identifying and sorting your employee information. In this case, a table could be used to keep track of your self-identifying questionnaires. For instance, if you were not using the Region table for anything, you could customize the table to include entries such as:

<u>Region code</u>	<u>English description</u>
SUB	Questionnaire Submitted
NSUB	Questionnaire Not Submitted
INC	Questionnaire Incomplete

When entering employee information, you would select one of these codes. You could then sort your employee information by Region code to view the list of employees who have submitted their questionnaire and those who did not.

N.B. This feature is only available in the FCP mode.

4. My numbers are showing incorrect calculations in the salary quarters on Form 2. Am I doing something wrong or is there a problem with the software?

What might appear to be a calculation error in this case could actually be a misunderstanding of how the salary quarters and the counts are calculated. You have to analyse your employee data using EECRS to understand how the software calculates the numbers. You could start by sorting your data by the following (refer to the EECRS Version 4.0 User's Guide):

- Employee Status in ascending order
- Occupational Group and Title in ascending order

- Salary in descending order

Find your bottom and top salary for the sort specified and calculate the salary quarters (instructions can be found in Guideline 11: Employment Equity Reporting).

5. Is *term.txt* where I enter my terminations?

No, term in this context means temporary. The *term.txt* file is where you enter your temporary and casual employee date information. If there is an employee record in the *employee.txt* file with an employee status of 03 (Temporary) or 05 (Casual), the *term.txt* file must be created and the date information for temporary and casual employees must be entered.

6. I have successfully imported the *employee.txt* file and would like to know how to import my promotions and/or temporary information (*promo.txt*, *term.txt*).

EECRS imports all files at once therefore all import files must be in the same directory. When the user selects the *employee.txt* file, EECRS imports the data from that file and then looks for the other text files (i.e. *term.txt*, *promo.txt*, *region.txt* or *division.txt*) in that same directory. If any of the other files are located in the same directory, EECRS will automatically import the data from them at the same time. These files cannot be imported individually.

7. What do *term.txt* and *promo.txt* mean, and why do I need these separate files?

The *term.txt* file is created to capture date information for temporary and casual employees. If your company employed temporary or casual employees during the reporting period, you must create this file (refer to the EECRS Version 4.0 User's Guide). The *promo.txt* file is created to capture date information for employees who were promoted. If your company gave promotions during the reporting period, you must create this file. (Refer to the EECRS Version 4.0 User's Guide.)

8. If I have created a *term.txt* and/or a *promo.txt* file(s), do I still need to include those employees in the *employee.txt* file?

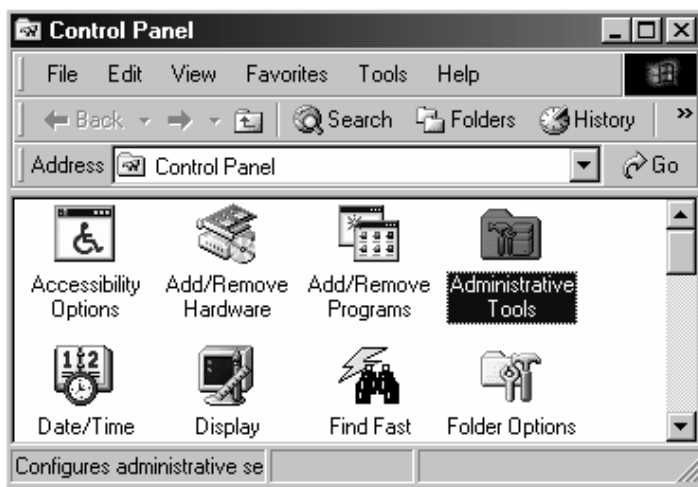
Yes, you must include those employees in the *employee.txt* file because the information captured in the *employee.txt* file is required for each employee.

9. EECRS was successfully installed on my PC but when I enter the password and then click OK, the following login error message, or one similar to it, appears:



In most cases, this situation occurs in a Windows NT environment. Windows NT has a sophisticated access system and normally, end-users do not have certain read/write permissions to some key folders. Ask your system administrator to give you full access to the C:\Program files\Hrdc directory and all its sub-directories. Also, inform your system administrator to add an EECRS System Data Source Name (System DSN) in the ODBC Data Source Administrator identical to the EECRS User Data Source Name (User DSN). Listed below is a detailed “How to” for Windows 2000 environment:

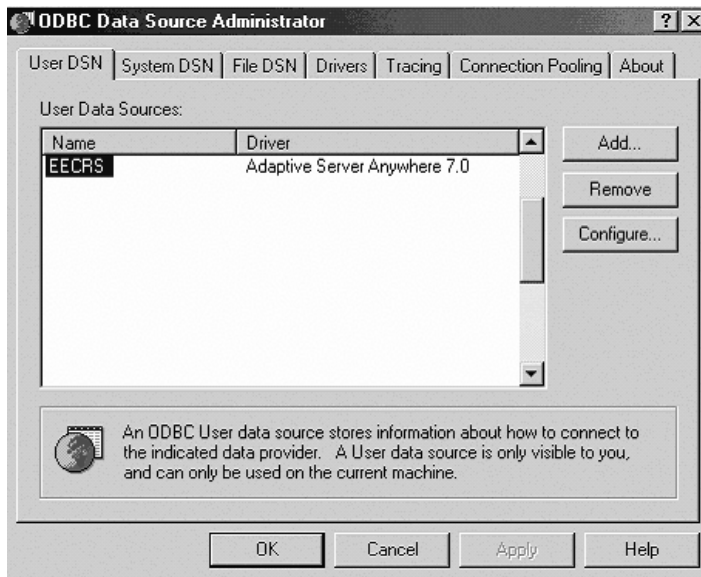
- a) Click on **Start**.
- b) Highlight **Settings**.
- c) Click on **Control Panel**.
- d) Double-click on the **Administrative Tools** icon. If you are in a Windows 95 environment, skip this step and proceed to step e).



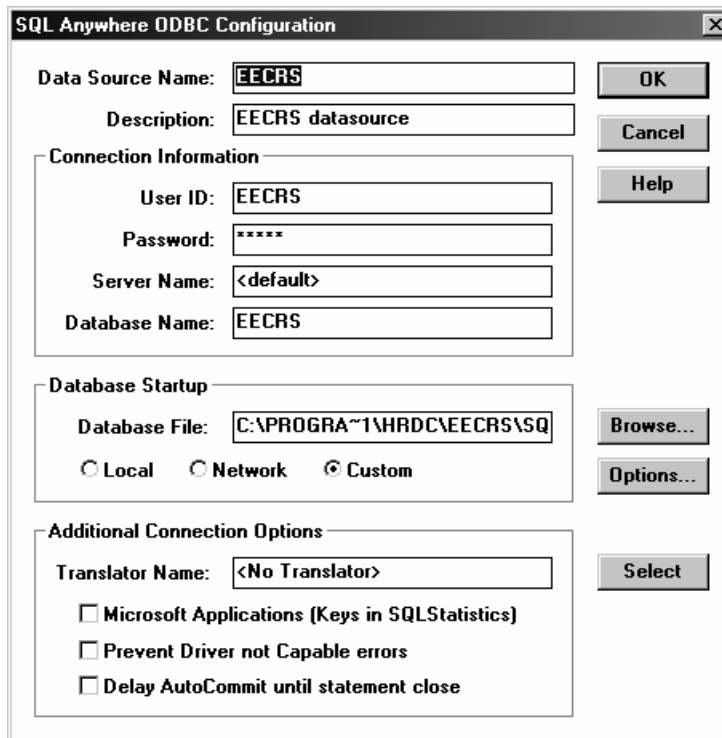
- e) Double-click on the **Data Sources (ODBC)** icon:



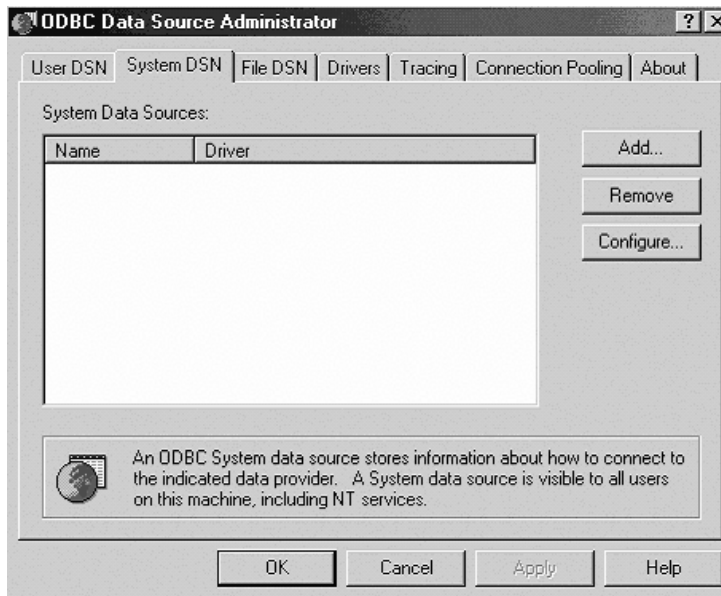
f) Double-click on the **EECRS** User Data Source Name:



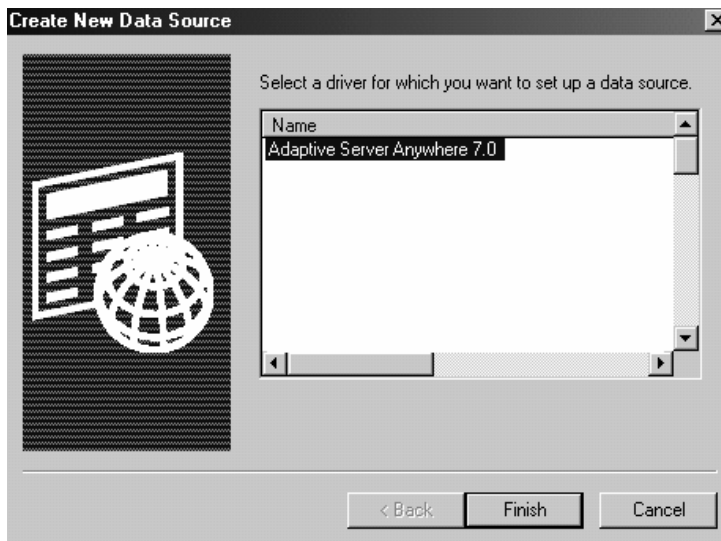
g) Make a note of the information displayed on the EECRS SQL Anywhere ODBC Configuration window (the Password is EECRS):



- h) Click Cancel to return to the ODBC Data Source Administrator window, click on the **System DSN** tab and click on the **Add** button:



- i) From the Create New Data Source window, select the Adaptive Server Anywhere 7.0 driver and then click on the **Finish** button:



- j) When the SQL Anywhere ODBC Configuration window appears, enter the same information displayed in the EECRS User Data Source Name then click the **OK** button.

10. I have created the import file(s) using MS Excel but I am still not able to import the file(s) into EECRS.

There are a couple of things to remember when creating import file(s) using MS Excel:

- a) The entire spreadsheet must be in text format.
- b) The files must be saved with specific file names and must be saved as text tab delimited.

For further information, refer to **Appendix A: Importing Data**.

11. I have made some changes to my employee information but the changes do not appear on the forms, why?

After making changes to your employee information, you must recompile your data so that EECRS will calculate the changes that have been made.

12. I've been told that I am receiving a new computer and I want to know if I can transfer my EECRS information from my old computer to my new one.

Yes, you can transfer your EECRS information. First, you will have to make a copy of your employee data. We suggest that you make two copies on separate diskettes using:

- (1) the Export Utility (refer to the "Importing and Exporting Data" section of the EECRS Version 4.0 User's Guide).
- (2) the Backup Utility (refer to the "Backup/Restore" section of the EECRS Version 4.0 User's Guide).

After the copies have been made, install EECRS on your new computer. Once EECRS has been successfully installed on your new computer, you can copy your employee data to your new computer using one of the two methods below:

- (1) If you are using the diskette with the exported data you will have to use the Import Utility (refer to the "Importing and Exporting Data" section of the EECRS Version 4.0 User's Guide).
- (2) If you are using the diskette with the backup data, you will have to use the Restore Utility (refer to the "Backup/Restore" section of the EECRS Version 4.0 User's Guide).

13. EECRS rejected my data because the Date format was incorrect. Windows XP does not allow me to change the Date format on my computer. What can I do?

In order to change the Date format in your Windows XP environment, you will have to ask your system administrator to give you the required access rights to the Control Panel (See "Installation Process".) Also, ask your system administrator to make sure that the server date settings do not overwrite the date settings on your computer.