

Pulling Data from eePoint by member

1. Login to eePoint.
2. Select the **Advance Search** tab and enter the following:

Search : Employee

Search **Advanced search** Most Recent Result Mavins, Patrici...

My Searches

Condition 1

Search + Add New Filter - Remove Last Filter

Operator Table Column Name Match Value(s)

Employee Employee Num Begins With 12345

Search + Add New Filter - Remove Last Filter

Value(s) = 5-digit employee ID (6 digit for WT employees) for the employee you require data for

3. Click on Search
4. Employees record will appear in a separate tab. Click back to the **Results** tab:

Employee

Search Advanced search Most Recent **Result** Smith, John

Employee Miscellaneous Personal Earnings / Hours History Service History Pension History Cases

Record ID: * 99999

Employee Num: 12345

Term Date:

Status Code: * Retired

Legacy EE Identifier: SMIJ987654

SWA ID Number:

Business Unit: Workplace Safety and Insurance Board

Union Code: Non-bargaining unit

Province Of Employment: Ontario

5. Select 'All Records' and click on Export:

Search Advanced search Most Recent Result Smith, John

All Records

Export Save Search Criteria Export Barcodes

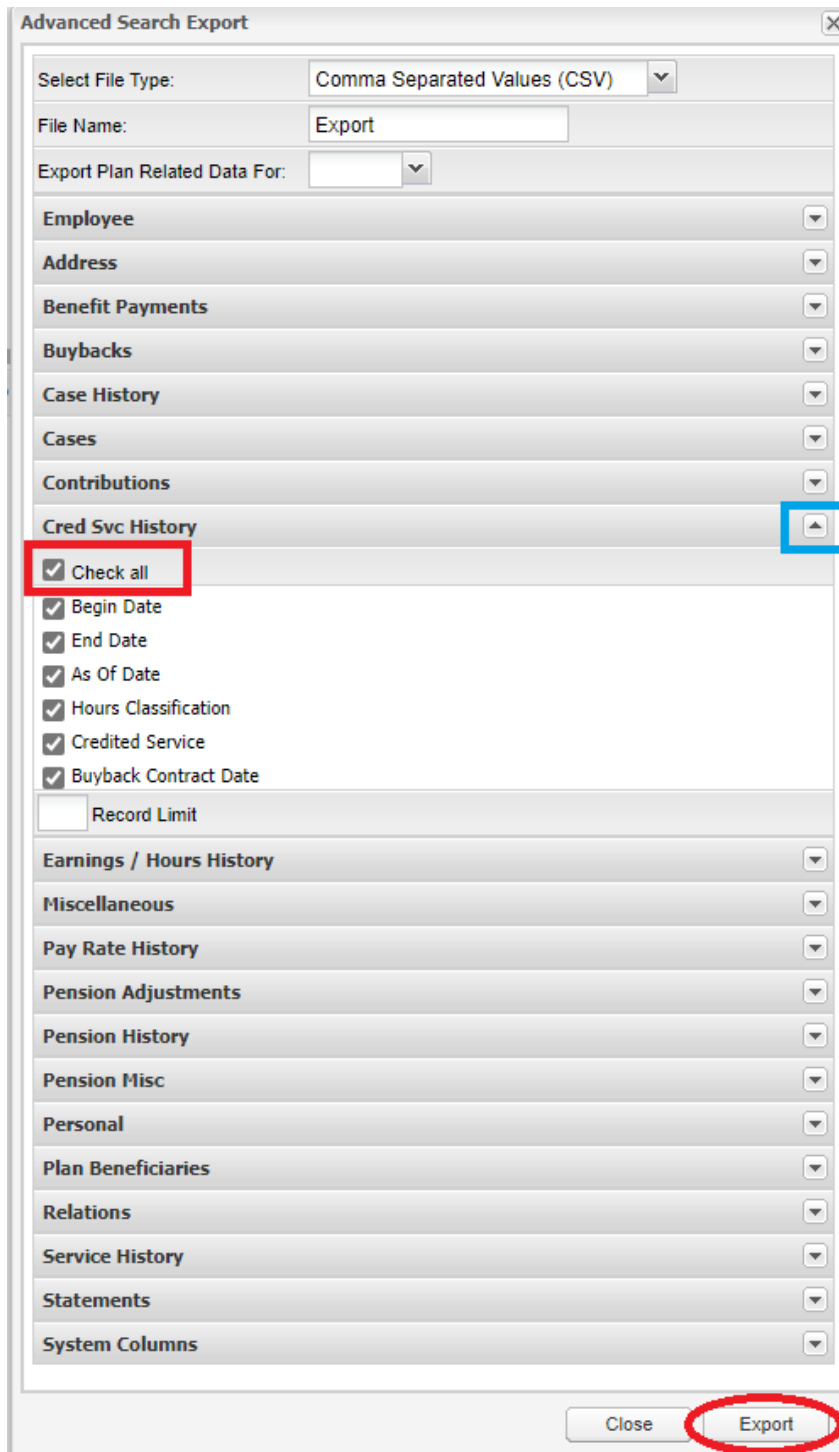
	Record ID	Name	SIN	Employee Num	Legacy EE Identifier	SWA ID Number	Business Unit	Union Code	Province Of Employme
<input checked="" type="checkbox"/>	1 99999	Smith, John	XXX-XXX-356	12345	SMUJ987654		Workplace Safety and Insurance Board	Non-bargaining unit	Ontario

6. The **Advance Search Export** window will appear displaying the different sections/screen summaries in eePoint.

Select the dropdown of the particular section you require the data for (eg. Credited Service History) and either select Check All to select all of the column headings displayed, or select only the headings you require (most cases you will select them all and you can then delete/modify them in Excel once the report is run).

Note - You may need to run each section separately due to the way eePoint has been configured (too much data from other sections does not always work in these reports).

Click on Export:



The image shows a software dialog box titled "Advanced Search Export". It contains several input fields and a list of data categories. At the bottom, there are "Close" and "Export" buttons. Red and blue boxes highlight specific elements: the "Check all" checkbox, the "Export" button, and the up arrow of the "Cred Svc History" dropdown.

Advanced Search Export

Select File Type: Comma Separated Values (CSV) ▼

File Name: Export

Export Plan Related Data For: ▼

Employee ▼

Address ▼

Benefit Payments ▼

Buybacks ▼

Case History ▼

Cases ▼

Contributions ▼

Cred Svc History ▲

☒ Check all

☒ Begin Date

☒ End Date

☒ As Of Date

☒ Hours Classification

☒ Credited Service

☒ Buyback Contract Date

Record Limit

Earnings / Hours History ▼

Miscellaneous ▼

Pay Rate History ▼

Pension Adjustments ▼

Pension History ▼

Pension Misc ▼

Personal ▼

Plan Beneficiaries ▼

Relations ▼

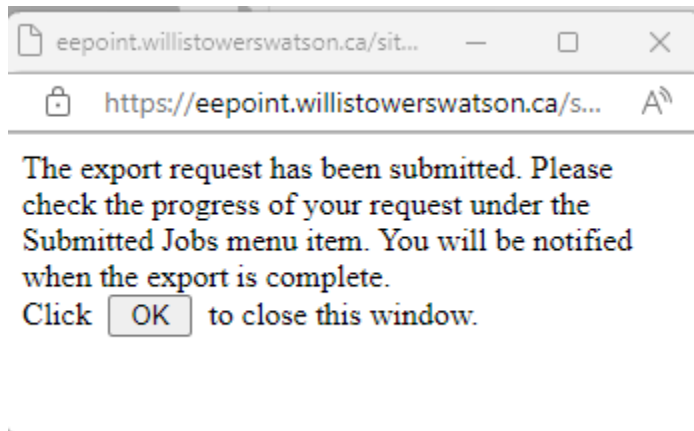
Service History ▼

Statements ▼

System Columns ▼

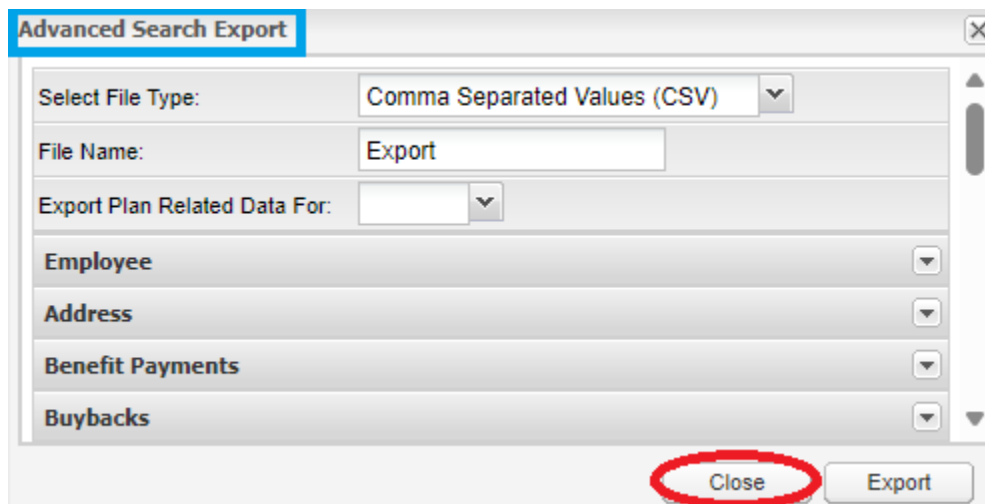
Close Export

7. eePoint report window will appear with the following message:

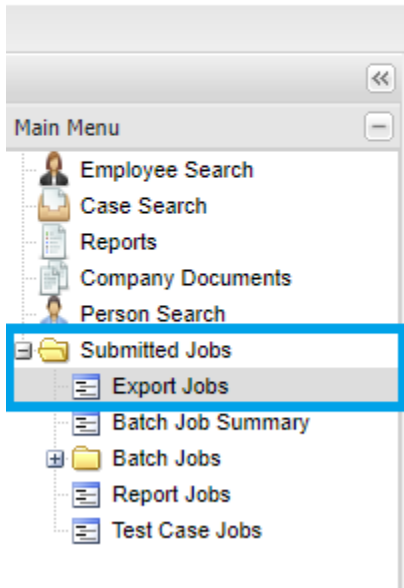


Click OK to close.

8. The Advanced Search Export window will still be on the screen.
Deselect your current selection and pick your next data points and follow steps 6 and 7 above.
9. If no other data reports are required, click on 'Close' in the Advanced Search Export window:



10. On the lefthand side of the eePoint screen, expand **Submitted Jobs** and select **Export Jobs**.



11. The Export Jobs window will appear. This is where you will find the reports you have just run in queue. Once the report(s) has successfully run, the status will show as ‘Completed’. Expand the report and click on Export to download the .CSV file (this will download to your Downloads folders):

The screenshot shows the 'Export Jobs' window with a table of export jobs. The first job is expanded, showing details and an 'Export' button. The status bar at the bottom indicates 'Page 1 of 759' and a refresh icon.

Caption	Status	Last Update	Submitted By	Start Date	Completion Date
Advanced Search Export	Completed	01/06/2025 12:58:37PM CST	Marsha Ubbi	01/06/2025 12:58:36PM CST	01/06/2025 12:58:37PM CST
Export Finished 20 records Type: CSV Execution Time: 0:00:01.3749863					
Advanced Search Export	Completed	01/06/2025 11:14:24AM CST	Veronique Seguin	01/06/2025 11:14:13AM CST	01/06/2025 11:14:24AM CST
Advanced Search Export	Completed	01/06/2025 10:53:37AM CST	Marsha Ubbi	01/06/2025 10:53:32AM CST	01/06/2025 10:53:37AM CST
Advanced Search Export	Completed	01/06/2025 10:50:10AM CST	Marsha Ubbi	01/06/2025 10:50:08AM CST	01/06/2025 10:50:10AM CST
Advanced Search Export	Completed	01/06/2025 10:22:22AM CST	Marsha Ubbi	01/06/2025 10:22:21AM CST	01/06/2025 10:22:22AM CST
Advanced Search Export	Completed	01/06/2025 10:22:12AM CST	Marsha Ubbi	01/06/2025 10:22:09AM CST	01/06/2025 10:22:12AM CST
Advanced Search Export	Completed	01/06/2025 10:22:01AM CST	Marsha Ubbi	01/06/2025 10:21:58AM CST	01/06/2025 10:22:01AM CST
Advanced Search Export	Completed	01/06/2025 10:21:43AM CST	Marsha Ubbi	01/06/2025 10:21:42AM CST	01/06/2025 10:21:43AM CST
Advanced Search Export	Completed	01/06/2025 10:21:30AM CST	Marsha Ubbi	01/06/2025 10:21:27AM CST	01/06/2025 10:21:30AM CST
Advanced Search Export	Completed	01/06/2025 10:20:16AM CST	Jessica Dallaire	01/06/2025 10:20:11AM CST	01/06/2025 10:20:16AM CST

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Displaying 1 - 10 of 7586

Close

If the status shows as ‘Started’, you may need to refresh the queue a few times by clicking the icon (circled in green above).

12. Open the .CSV file and immediately save the file as an **Excel Workbook** or **.XLSX file**. This will ensure that the formatting/filtering you apply to the file will not be lost.