

## **MyHR - Reporting Service User Guide**

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## 1 – What are reports in MyHR?

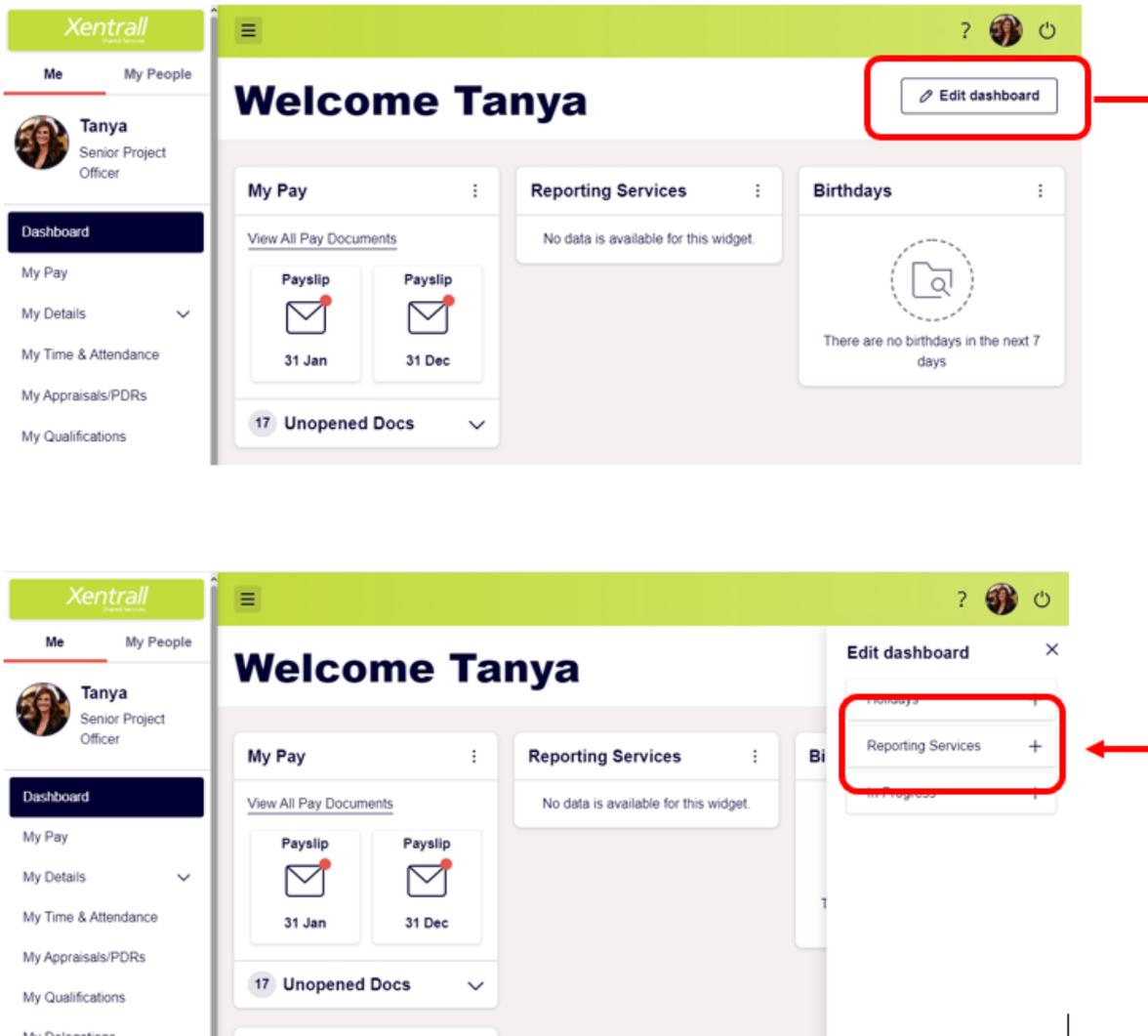
The reports in MyHR allow Managers to view real time employee, HR and Payroll information.

This document will guide you through where to find the reports and how to run them.

**IMPORTANT:** Reporting Services automatically restricts access to information based on the users Permissions. You can only run a report for Staff you have MyHR responsibility for.

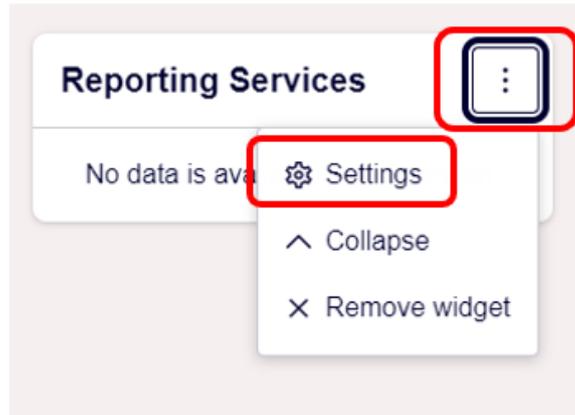
## 2 – Adding Reporting Services Widget to Dashboard

To set up Reporting Services widgets, click Edit Dashboard.



Click Reporting Services to add the widget. **You need to add a total of 3 reporting services widgets.**

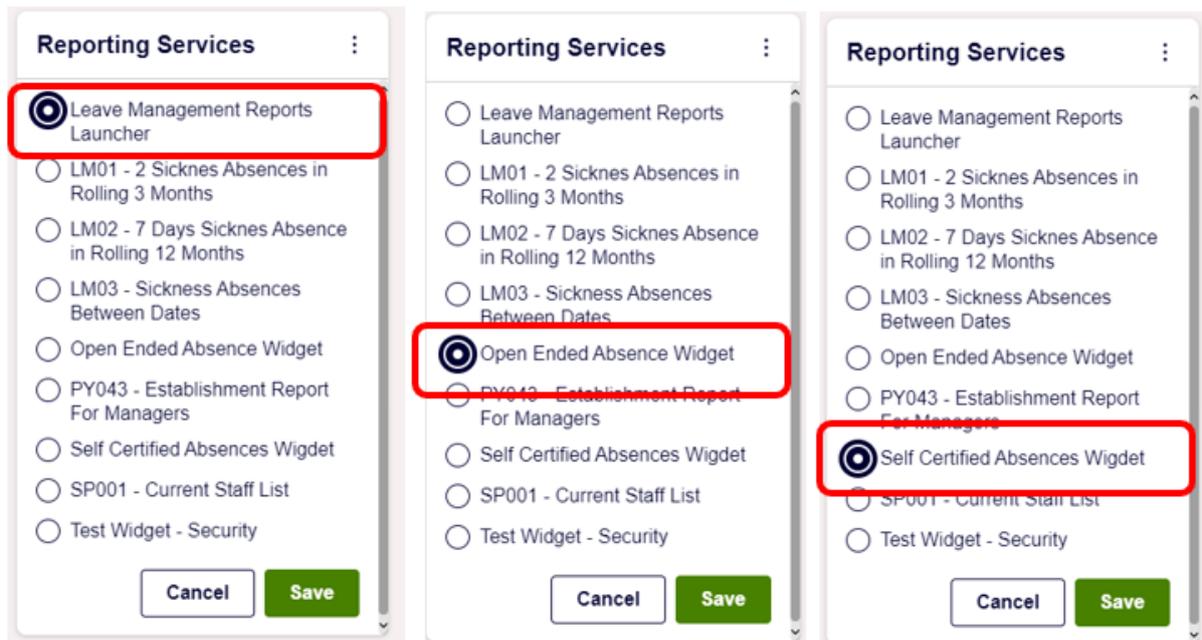
On the Reporting Services Widget, click the settings icon



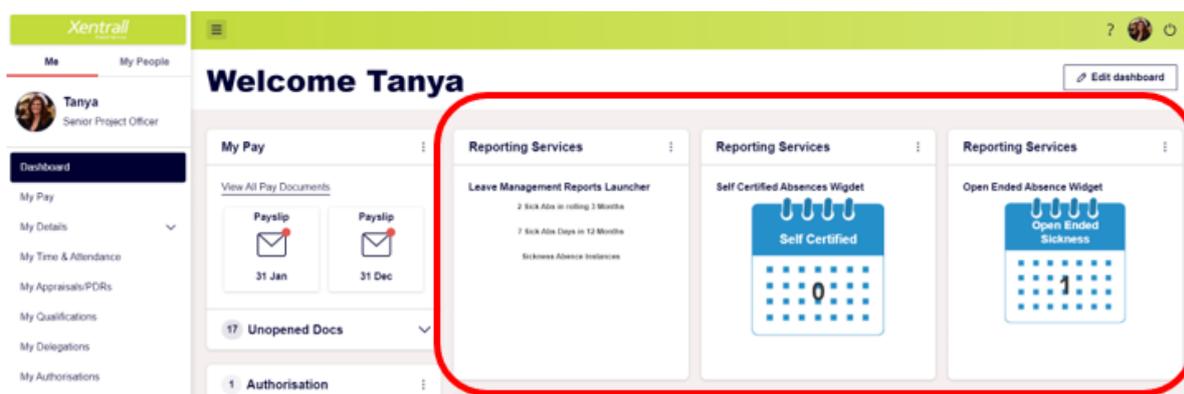
On the first widget select **Leave Management Reports Launcher** and save.

The second widget, select **Open ended Absence Widget** and save

The third, select **Self Certified Absence Widget** and save.



Your dashboard reports should look like this



You only need to do this task once. The widgets should now stay on your dashboard each time you log in.

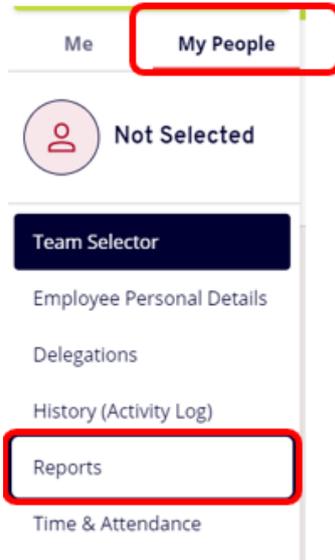
Widget Reports for monitoring absence:

- 2 Sick Abs in rolling 3 Months
- 7 Sick Abs Days in 12 Months
- Sickness Absence Instances
- Open ended Absence
- Self-Certified Absence

### 3 – Accessing Reports not included in Widget

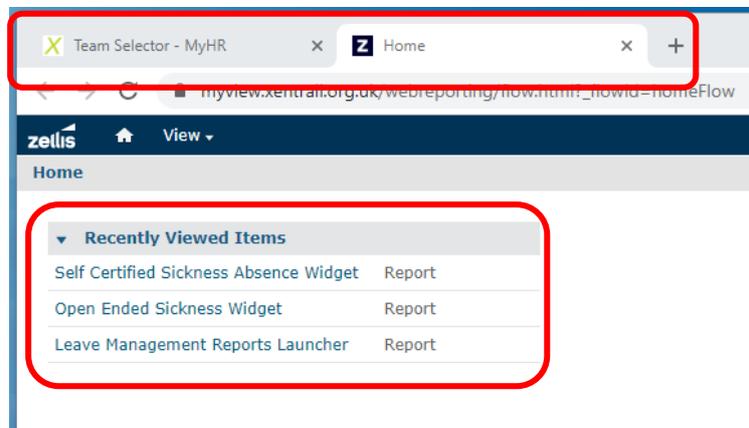
Go to 'My People'

Select **Reports** from the left hand menu

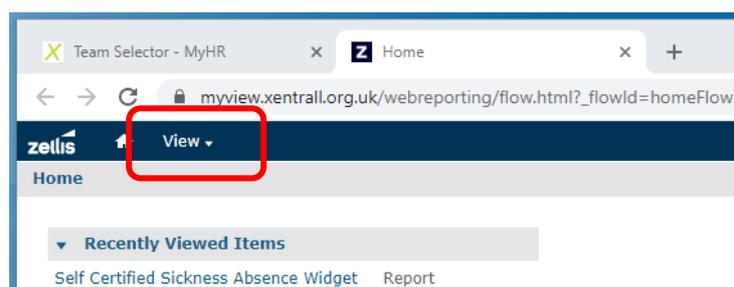


An additional tab will open

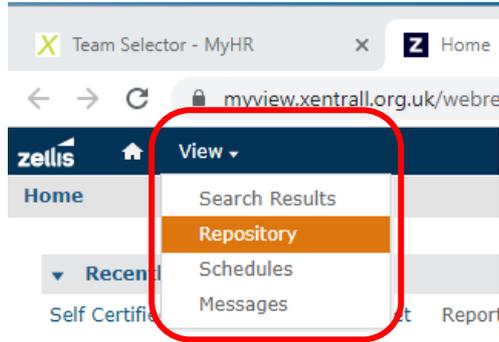
The 'home Page' will always display your recently used reports – you can use these links to open the reports



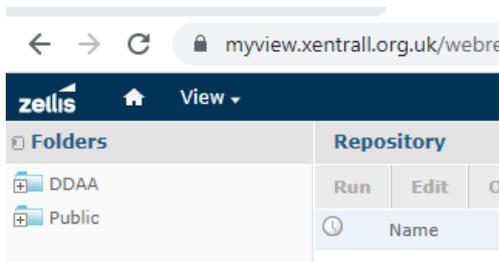
For more reports, click **View**



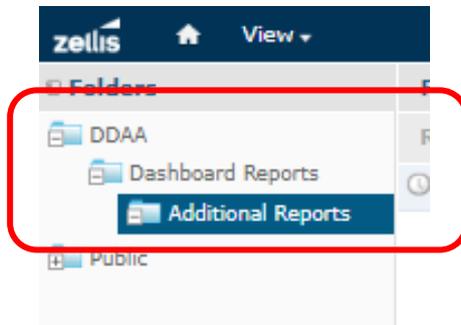
A drop down will appear



Select 'Repository'



Use the '+' to open the folder path **DDA -> Dashboard Reports -> Additional Reports**

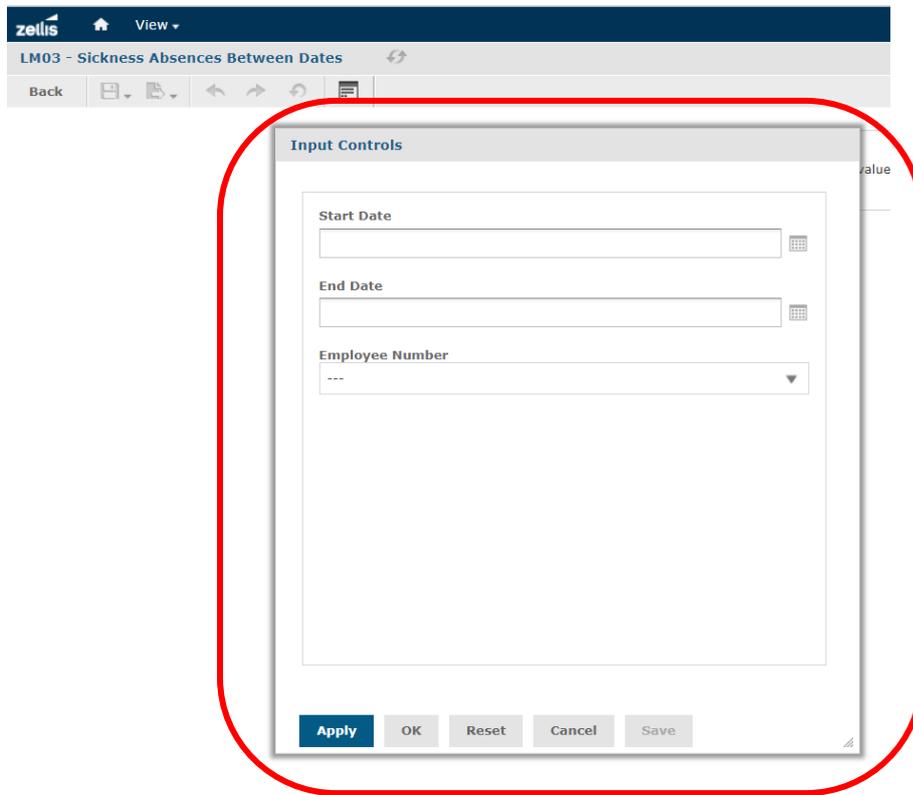


The list of reports becomes available in the main window

Repository								
Run	Edit	Open	Copy	Cut	Paste	Delete	Name	Description
<b>DB1001 Basic Employee Details Report</b>								
							DB1002 Academy Absence Report	Sick/Paid and Unpaid
							DB1003 Academy headcount - Trust Report	
							DB1003a Academy headcount - School Report	
							DB2001 - MyHR Payments - Employee input Report	Use only for Employees entering their own payments
							DB2002 - MyHR Payments - Manager input Report	Use only for Managers entering payments on behalf of employees

Open the report by clicking on it

The first screen should display **Input Controls**. This is how you filter the data



If the **Input Controls** do not automatically appear they can be accessed by selecting this icon from the top bar



You must apply input values t

Use the **'Back'** button to return to the list of reports



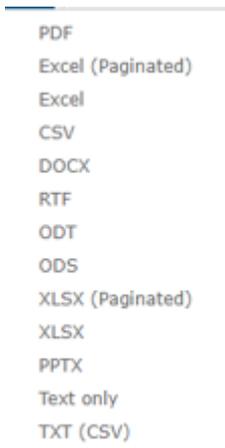
You must apply input values t

## 4 – Saving and Exporting data from Reports

Report data can be exported in a variety of formats and saved. Once the report is open and the Input Controls applied, locate the 'export' icon:



Select a format from the dropdown list



The report will appear on the screen and can then be opened and saved.

## 5 - Additional Reports – Individual Report Guide

Report Name	Use for	Input Controls
DB1001 - Basic Employee Details	Employee and post details for current employees and future leave dates	Do not amend the Input Controls for this report. The data is designed to be accurate as at the day the report is run.
DB1002 Academy Absence Report	Absence report for the whole company between dates	<p>* <b>Pers Hierarchy Lvl1 Long Desc</b> – this will be restricted to the users company</p> <p>* <b>LM Abs Hdr Abs Type Code</b> – Absence types already selected. <i>Do not change</i></p> <p>* <b>LM Abs Hdr Start Date is on or before</b> – enter the END of the period you are looking at</p> <p>* <b>LM Abs Hdr End Date is on or after</b> – enter the START of the period you are looking at.</p> <p><i>e.g for absence history between 01/04/2022 – 30/09/2022 enter ...</i></p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>LM Abs Hdr Start Date is on or before</p> <input style="width: 100%;" type="text" value="2022-09-30 15:23:00"/> </div> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>LM Abs Hdr End Date is on or after</p> <input style="width: 100%;" type="text" value="2022-04-01 23:00:00"/> </div> <p>* <b>PH Grade End Date 1 equals / PH Grade End Date 2 is o or after / PH Hours End Date 1 equals / PH Hours end date 2 is on or after / PH Position Status End Date 1 equals / PH Positions Status End Date 2 is on or after</b> – all of these options should be left as is</p> <p>* <b>Pers Hierarchy Lvl2 Long Desc</b> – Use to select individual schools within a Company, or click Deselect All to include whole Company</p>
DB1003 Academy headcount – Trust Report	Head count (as at the day it’s run) for the whole company	This report is set up to run automatically. If you are presented with the Input Controls box, click Apply, then OK to remove. The data provided is correct as at the sat it is run.
DB1003a Academy Headcount – School Report	Head count (as at the day it’s run) filter by individual School	<p>* <b>Pers L1 LDesc</b> – this will be restricted to the users company</p> <p>* <b>Pers L2 LDesc</b> – Select required School</p> <p>* The rest of the input control fields are set automatically. Do not change these.</p>

<p>DB1004 School Turnover Main Post Report</p>	<p>Displays total turnover of staff for the required month</p>	<ul style="list-style-type: none"> <li>* <b>Pers L1 LDesc</b> – this will be restricted to the users company</li> <li>* <b>Pers L2 LDesc</b> – Select required School</li> <li>* <b>Start Date</b> – The day <i>before</i> the start of the required period. e.g. you want data for September, select Start Date as 31 August to ensure all 1<sup>st</sup> September start dates are included.</li> <li>* <b>End Date equals</b> – leave blank</li> <li>* <b>End Date is on or after</b> – Enter end date of period</li> <li>* <b>Hrs End Date equals</b> – leave blank</li> <li>* <b>Hrs End Date is on or after</b> – Enter end date of period</li> <li>* <b>End Date equals</b> – leave blank</li> <li>* <b>End Date is on or after</b> - Enter end date of period</li> <li>* <b>Position Status End Date equals</b> – leave blank</li> <li>* <b>Position Status End Date is on or after</b> - Enter end date of period</li> <li>* <b>COST-CENTRE_END_DATE equals</b> – leave blank</li> <li>* <b>COST-CENTRE_END_DATE is on or after</b> - Enter end date of period</li> <li>* <b>Position Status Long &amp; Main Post YN</b> – Pre-set – do not change</li> </ul>
<p>DB1005 Projected End Dates Report</p>	<p>Displays current staff who have temporary contracts</p>	<ul style="list-style-type: none"> <li>* <b>Pers L2 LDesc</b> – this is restricted to the users company</li> <li>* <b>Projected End Date between</b> – Enter the start date of the period you wish to look at</li> <li>* <b>And</b> – Enter the end date of the period you wish to look at</li> <li>* <b>End Date equals / Occ Type not / Current Employee YN not / Post LDesc does not start with / Current Post Hold</b> – Do not enter information in to or amend any of these fields</li> </ul>
<p>DB1006 Staff List</p>	<p>Current Employees with very basic post information</p>	<p>Do not amend the Input Controls for this report. The data is designed to be accurate as at the day the report is run.</p>
<p>DB1007 Parental Absence Report</p>	<p>Details staff on Maternity / Paternity / Adoption leave</p>	<ul style="list-style-type: none"> <li>* <b>Atdtyp Long Desc</b> – Pre-set – do not change</li> <li>* <b>Start Date is on or before</b> – Enter the start date of the period you wish to look at</li> <li>* <b>End Date is on or after</b> – Enter the end date of the period you wish to look at</li> <li>* <b>End Date equals</b> – Leave blank</li> </ul>

<p>DB1008 Personal Details Changes</p>	<p>Basic employee personals changes</p>	<ul style="list-style-type: none"> <li>* <b>DATA_ELEMENT not</b> - Pre-set – do not change</li> <li>* <b>AUDIT_DATE is after</b> – enter the date you wish to view changes from</li> <li>* <b>R_TYPE not</b> - Pre-set – do not change</li> <li>* <b>OBJECT_IT not</b> - Pre-set – do not change</li> <li>* <b>LONG_DESC</b> – this is restricted to your MyHR security group</li> </ul>
<p>DB2001 Payments (Authorised via MyHR)</p>	<p>Payment entries that have been entered by an employee (or on behalf of an employee) and authorised by a second party via MyHR.</p>	<ul style="list-style-type: none"> <li>* <b>EMP_INST_ATT_START_DATE between</b> – select start of period required using the calendar</li> <li>* <b>And</b> – select end of period required using the calendar</li> <li>* <b>End Date 1 equals</b> – Leave Blank</li> <li>* <b>End Date 2 is on or after</b> – pre-set. Do not change</li> <li>* <b>EMP_INST_AUTH_DESCRIPTION starts with</b> – pre-set. Do not change</li> <li>* <b>Auth Action</b> – pre-set. Do not change</li> </ul>
<p>DB2002 Payments (Not Authorised via MyHR)</p>	<p>Payments entered on behalf of employees, that are not authorised via MyHR (authorised via timesheet prior to being entered into MyHR)</p>	<ul style="list-style-type: none"> <li>* <b>EMP_INST_ATT_START_DATE between</b> – select start of period required using the calendar (use period payment was EARNED not input)</li> <li>* <b>And</b> – select end of period required using the calendar</li> <li>* <b>End Date 1 equals</b> – Leave Blank</li> <li>* <b>End Date 2 is on or after</b> – pre-set. Do not change</li> <li>* <b>EMP_INST_AUTH_DESCRIPTION starts with</b> – Pre-set. Do not amend</li> <li>* <b>Auth Action</b> – pre-set. Do not change</li> </ul>