

MyHR Staff Absence Import into Arbor MIS

Once staff absences are entered into MyHR you can export and import into your Arbor MIS system. This will save duplication and hopefully prove more efficient for school staff.

Accessing MyHR Reports

- Go to 'My People'
- Select **Reports** from the left hand menu
- Reporting Services will open on a new tab
- For reports, click View, then Repository

			X Team Selector - MyHR ×				
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 Recently Viewed Items 		Н	ome		Search Results		
Self Certified Absences Wigdet	Report			-	Repository		
Leave Management Reports Launcher	Report		▼ F	Recentl	Schedules		
Open Ended Absence Widget	Report		Self	Certifie	Messages	et	Report

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

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	View •	DDAA
zellis 🔒	Repository	Dashboard Reports
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• From the list of reports, select DB1009 Arbor Absence Extract Report

Repo	ository												
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0	Name												
	DB1001 Basic Employee Details Report												
	DB1002 Academy Absence Report												
	DB1003 Academy headcount - Trust Report												
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	DB1004	School Tu	urnover M	1ain Pos	t Report								
	DB1005	Projected	l End Dat	es Repo	rt								
	DB1006 Staff List												
	DB1007	Parental	Absence	Report									
		Personal											
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	DB2002	MyHR Pa	yments (Manager	Input) Re	eport							

• Click Input Controls to filter the data

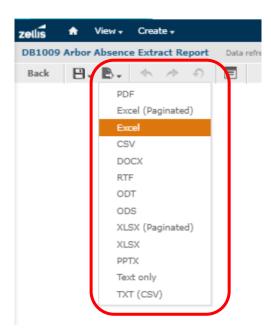
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			Available: 20 Search list [Null] 30CINF 30CSCK CASSCK DBPLV DBUPLV DLHR DLHR DLVEP	

- * LM Abs Hdr Start Date is on or before enter the END of the period you are looking at
- * LM Abs Hdr End Date is on or after enter the START of the period you are looking at.

e.g for absence history between 01/04/2022 – 30/09/2022 enter ...

LM Abs Hdr Start Date is on or before								
2022-09-30 15:23:00								
LM Abs Hdr End Date is on or after								

- You do not need to change other options, only the date range.
- Click Apply, then OK to close the Input Controls Box.
- To download the Report into an Excel document, click the Export button



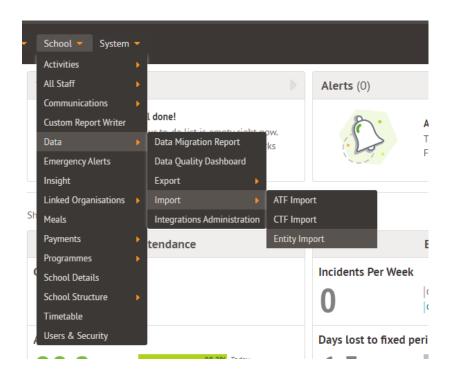
Things to note:

The MyHR report includes Saturday & Sunday in the total days calculation, as we do not hold work patterns in the Payroll system. You can load the data into Arbor as is so that the 2 systems match or, you can re-calculate the total days based on the employee's working week. To help with this, we have included the absence start and end DAY in the last 2 columns of the MyHR report which should make it easier to see where weekends are included.

For help using MyHR Reports, please contact the Support Team at <u>myhr@xentrall.org.uk</u> or 01642 524567



• Log into Arbor and download the staff absence import file via the School | Data | Import | Entity Import menu route.



Students 🔻 School 🔻 Syste	m *		Q Search
Welcome back To continue your move to Arbor, p	lease select one of the entity importers listed below and fol	ow the instructions displayed to import y	your data. If you need any support, please visit our <u>Help Centre.</u>
Data Imports			
Hide columns 🔻		Q Search this table	e 🛓 Download 🔻 🙋 🌣 🚱 🐰
mport number	▼ Template name	- Description	✓ Imported ✓
1	Pay Scale Template	Pay Scale	8
2	Pay Scale Spinal Point Template	Pay Scale	8
3	Staff Template	Staff	8
4	Staff Absence Template	Staff	8
5	Staff Check Template	Staff	8
6	Staff Contract Template	Staff	8
Z	Staff Next Of Kin Template	Staff	8
8	Staff Qualification Template	Staff	8

My Items 🔻	Students 💌 School 👻 System 👻	Q Search
	Staff Absence Template	
ate	Start your move to Arbor From this page you can begin your move to Arbor by generating a new Staff Absence Template and following the instructions shown in Step 2. If you need any	rsupport, please visit our <u>Help Centre.</u>
	Step 1: Download the Staff Absence Template	
	Click the download button to the right to generate a new Staff Absence TempLate, and start the import of your data to Arbor	Download
	Step 2: Complete the Staff Absence Template	
	Each of the importers has been designed with a set of rules and validation. For support with completing the template for this importer, please see this Help cer Rules and validation for Staff Absence Template	ntre article: Entity Importer rules
	NI Number: mandatory Start Date & Time: mandatory Start Absence Category: must use drop down, mandatory Sickness Category: must use drop down Sickness Subcategory: must use drop down, mandatory	
	Note:	
	Must use drop down - there is a drop down menu in this cell, please use that to enter your data rather than copy and paste Mandatory - this information must be entered before your data can be imported into Arbor Must use numerical format - this cell asks for a date or time format to be entered - this must be in given in a format such as 01/01/2001 or 14:00, without letter	5
	Step 3: Upload the Staff Absence Template	
	Template* 😡	Browse
	Import your completed Staff Absence Template using the upload button to the right. Note: Please ensure that you have saved the template in an XLS format as	
		🕑 Upload

• Open the downloaded excel file.

AutoSave 💽 🗄 🤈	~ C+ 8 ~ =		Staff Absence Templa	ate (2).xlsx 💙	P Search					Cheryl Todd 🆓 🛛 🖽
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Legal First Name	Legal Surname	NI Number	Start Date & Time	End Date & Time	Actual Working Days	Actual Working Hours	Staff Absence Category	Sickness Category	Sickness Subcategory	Narrative
1										

• Paste in the data (do not take title row) from your MyHR export columns A to J only and check the data is aligned with the correct titles.

		С	D							
Legal First Name	Legal Surname	NI Number	Start Date & Time	End Date & Time	Actual Working Days	Actual Working Hours	Staff Absence Category	Sickness Category	Sickness Subcategory	Narrative
Cheryl	Todd	XX295662C	2023-03-06	2023-03-10	0.00	5.00	Time Off for Dependent (Unpaid)	Time Off for Dependent (Unpaid)		
Cheryl	Todd	XX295662C	2023-03-01	2023-03-03	0.00	5.00	Sickness (Self Certificated)	Chest and respiratory problems	Chest infection	
Cheryl	Todd	XX721682C	2023-01-04	2023-01-06	3.00	25.8	Strike	Strike		

- Save the file.
- In Arbor go back to your data import menu route and browse for the file to import.

School | Data | Import | Entity Import | Staff Absence Template

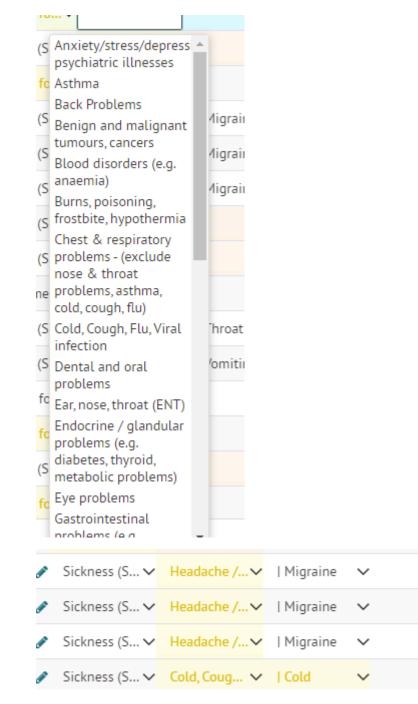
ep 3: Upload the Staf	Absence Template	
Template* 😡		Browse
port your completed Staff Abse	nce Template using the upload button to the right. Note: Please ensure that you have saved the template in an XLS format as any other file type will not work.	
		🗟 Uplo

- Press the upload button to start the process.
- If you get an error saying there are errors in the data it could be that your staff members have missing NI numbers in Arbor. These will need entering before you can continue with the upload.

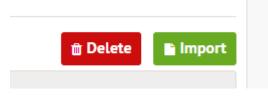
Sta	Absence Upload #8
The You	were some errors with your data re some errors in with the data you are trying to import ed to either correct the data here, or delete, amend and re-import your file. Hover over the field flagged in red below to see details of the error, then click this field to add in or correct the information. errors have been resolved, you can click import
Stat	B Delete Data Import
	action V C Hide columns V Q Search this table
Row	er 🗸 Legal First 👻 Legal Surn 👻 NI Number 👻 Start Date 👻 End Date & 👻 Actual Wor 👻 Actual Wor V Staff Absen V Staff Absen V Sickness Ca V Sickness Su V Narrative 💌
	XX881526C 🕜 💈
	XX413132A 🖋 💈

- You can correct errors on screen using the pencil icon but we advise that you delete and fix the data in Arbor and then do the upload again to save this happening for future uploads.
- If any of the Sickness categories are empty you can populate these if you wish using the drop down menu. They are **not mandatory** and the absences will import ok with just a Staff Absence Category and blank sickness categories.

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• One you are happy with the data you can click the import button.



• Back on the import screen you will see the status work through the import process.

Previous imports						
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Name	- Upload date	▪ Status				•
Staff Absence	21 Mar 2023	Import in prog	iress			

• Refresh the screen to see the progress.

2			
Previous imports			
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Name	▼ Upload date	▼ Status	•
Staff Absence	21 Mar 2023	Imported	

• The process is now complete, and you will see the absences stored against the staff members Arbor record and can be viewed via the School | All Staff | Absences menu route or their individual records.

- S	ichool 🔻	System	•		
A	ctivities		Þ	1	
\Ł ∧	ll Staff		Þ	Absences	
C	Communications		Þ	Add New Staff Member	
с	ustom Repor	rt Writer		Browse Staff	

• Change the dates to see more absences.



For help using Arbor, please contact your IT department.