EASY Reports

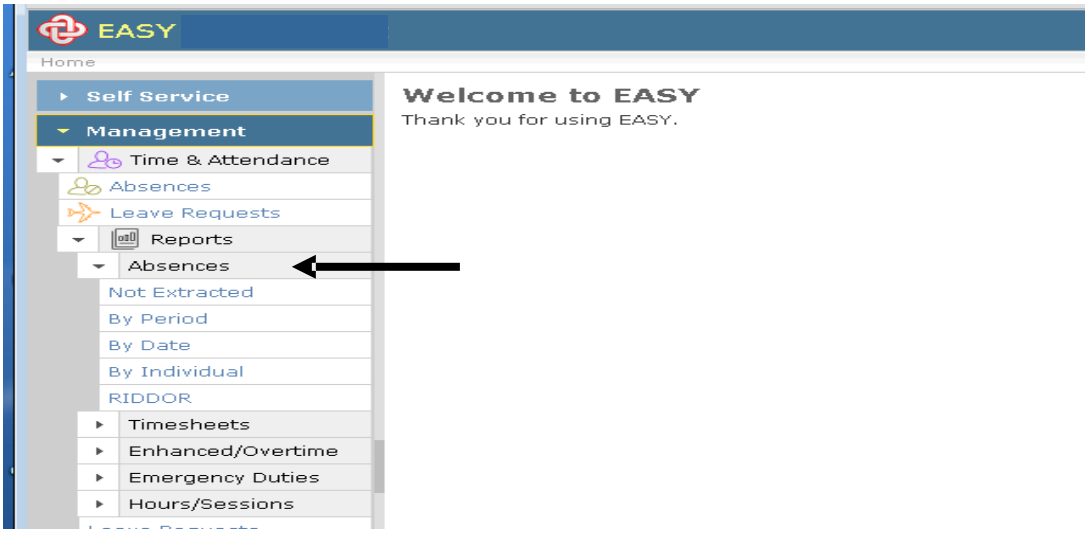
Before running reports on EASY please refer to guidance EASY Reports Running v1 for general details on how to run, open and save reports.

From the **Home** screen click on **Management > Reports**

Select desired report from list – the parameters for each report are different, use the drop down boxes and calendars where available to select parameters required.

When selecting parameters, ticking the 'Output to single Worksheet' and 'Simplified Worksheet', will produce the report with the information all on one easy to manipulate worksheet.

Opening the **Absences** category (clicking on small black arrow) will give the following reports:



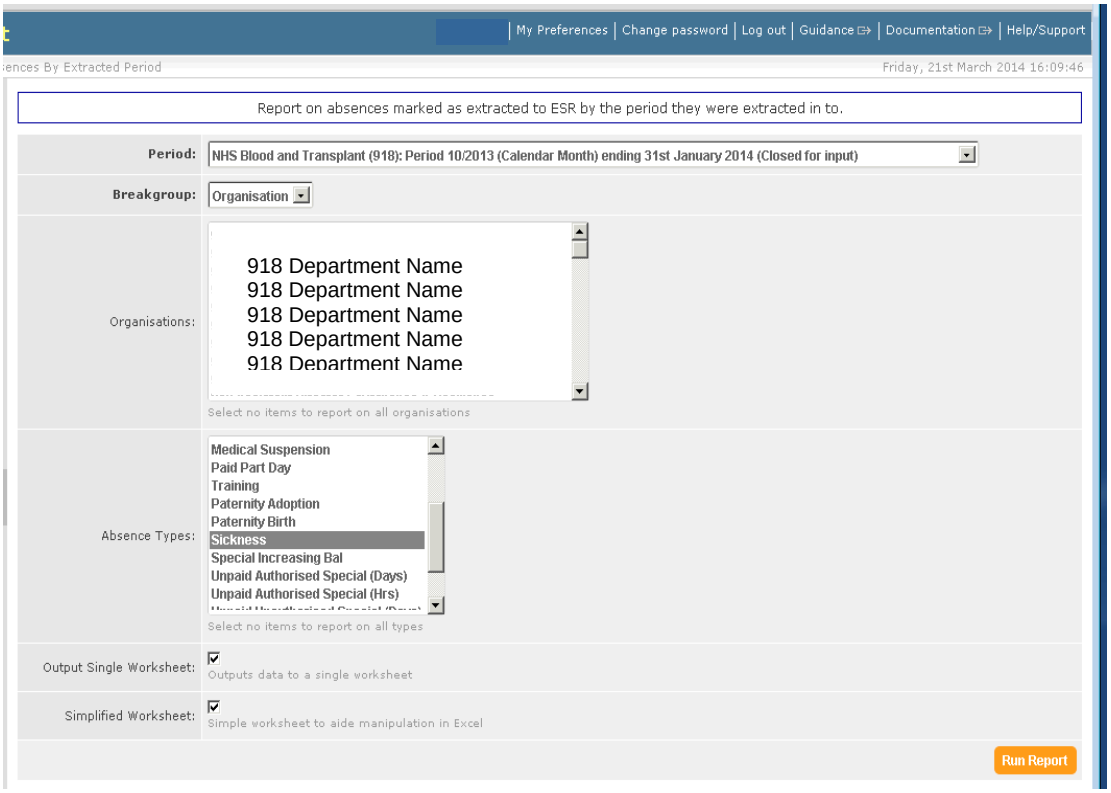
Not extracted

- will report on all absences within an organisation that are at the un-submitted or submitted stage which have not been extracted for upload to ESR by the interface.
- will also include any open sicknesses which have been extracted to ESR but are awaiting closure.

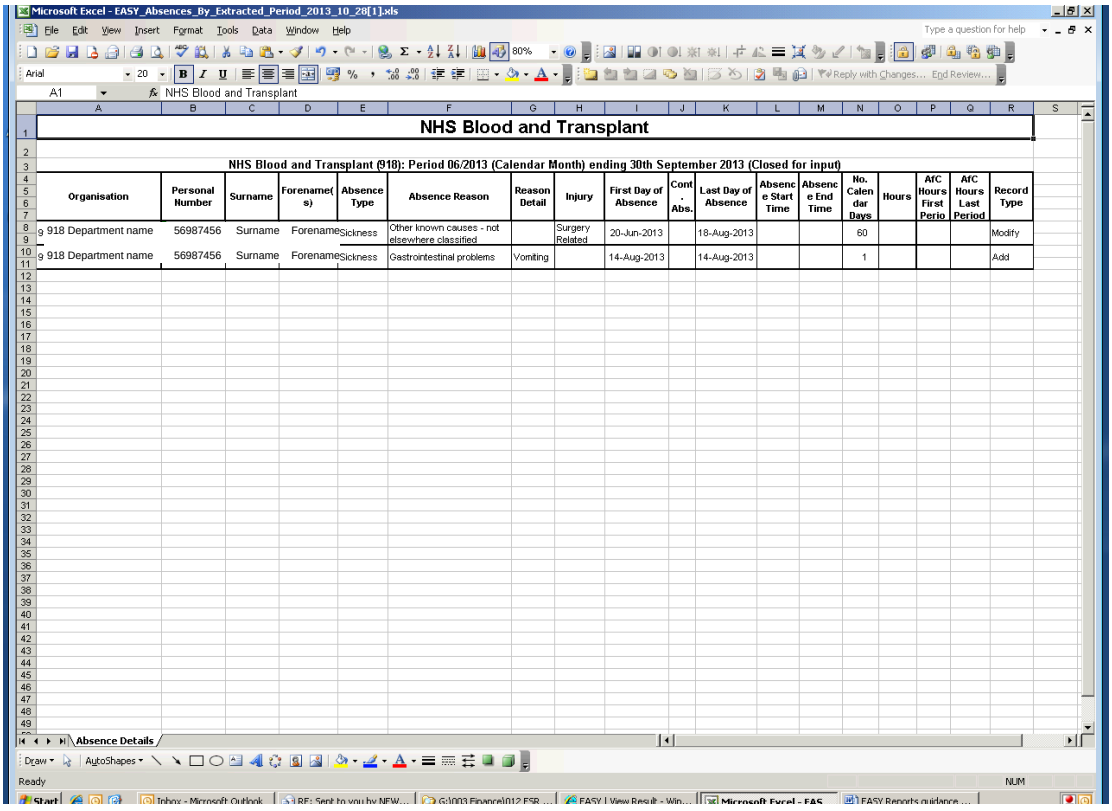
- By Period
  - will report on absences within an organisation for a specific absence type within a specified pay period.
- By dates
  - will report on absences within an organisation for a specific absence type within a specific date range.
- By Individual
  - will report on absences for an individual for a specific absence type within a specific date range.
- RIDDOR
  - will report on absences with RIDDOR reportable Injury Types within a specific date range.

Select desired report from list - Input the parameters requested and required for the report you have selected.

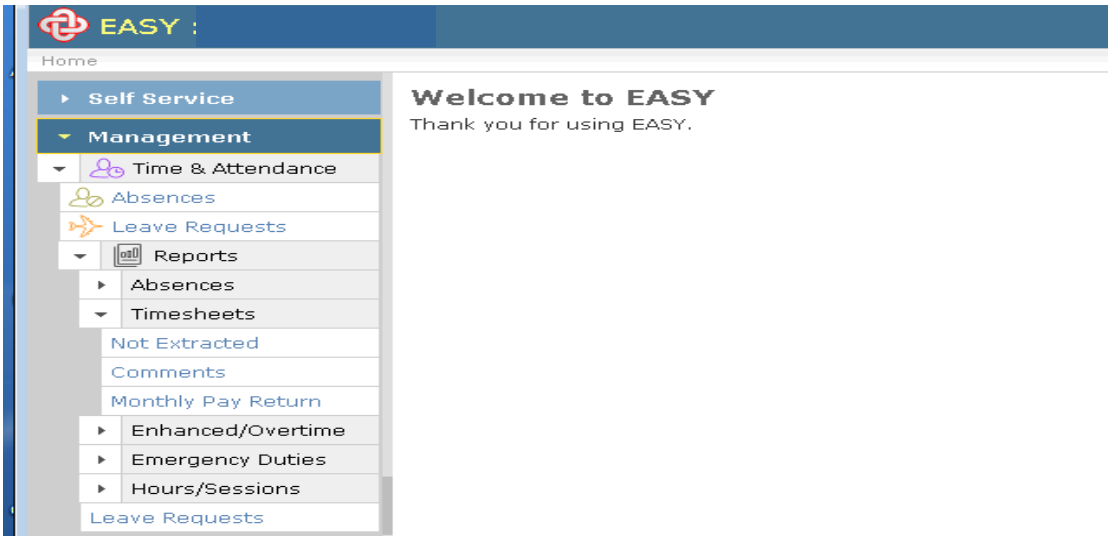
The example below is the Absences by Period report – select period required from dropdown box, pick absence type Sickness from the list, tick ‘Output to single Worksheet’, and tick ‘Simplified Worksheet’ then press Run Report.



An excel report is generated which should be saved to your desired location.



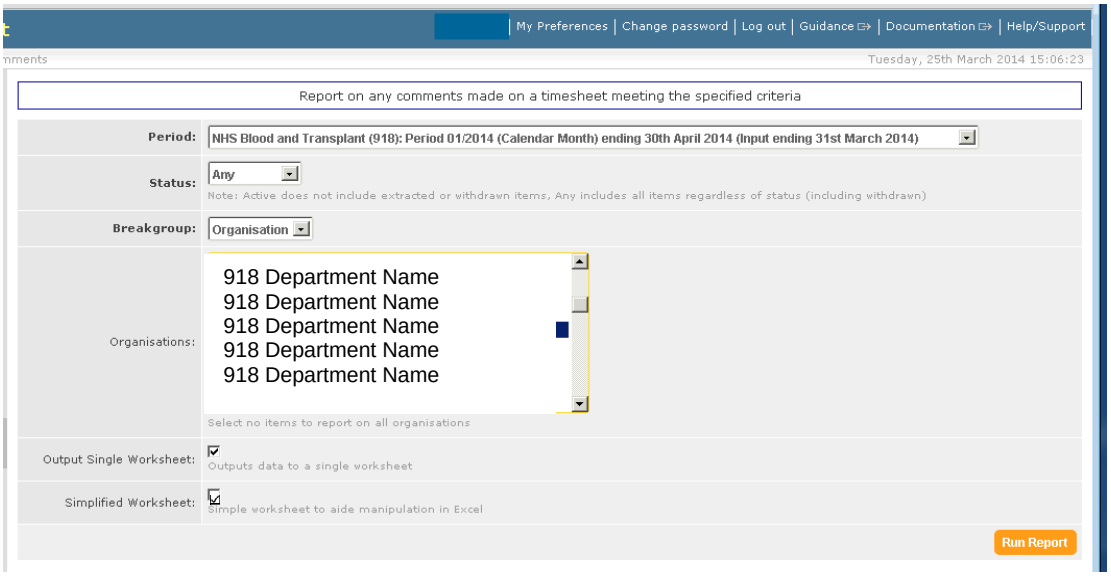
Opening the **Timesheets** category (clicking on small black arrow) will give the following reports:



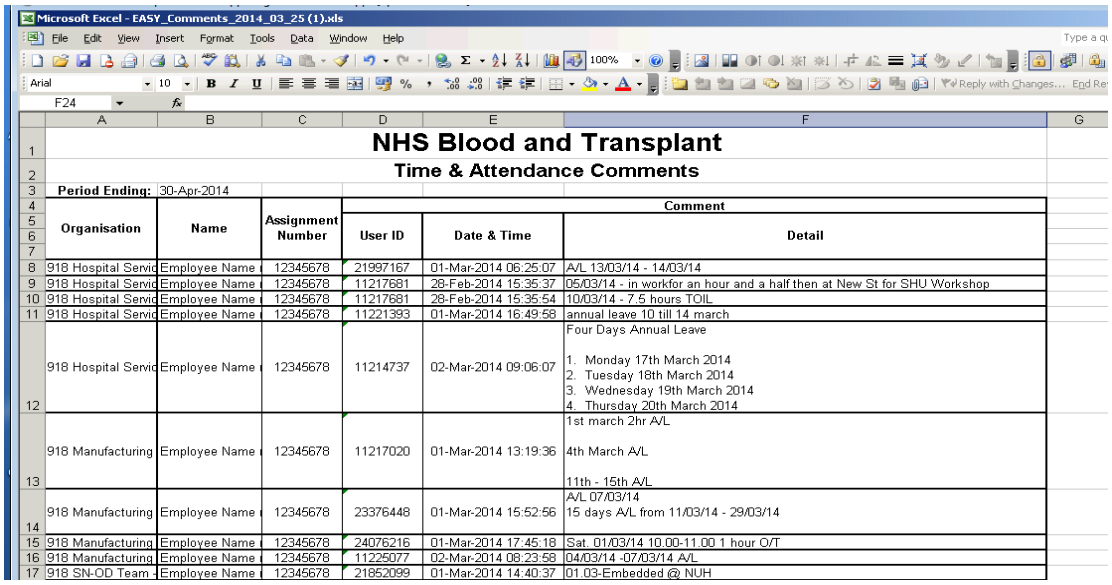
- Not Extracted
  - will report on all timesheet within an organisation that are at the un-submitted or submitted stage which have not been extracted for upload to ESR.
- Comments
  - will list all comments by organisation and period for each employee.
- Monthly pay return
  - this report is not used a present.

The example below is the comments report:

Select Comments report from list - for this report you are required to select period, select status, pick the required organisation from the available list, tick 'Output to single Worksheet' and tick 'Simplified Worksheet' then press Run Report.



An excel report is generated which can be saved to your desired location.



Microsoft Excel - EASY_Comments_2014_03_25 (1).xls

NHS Blood and Transplant

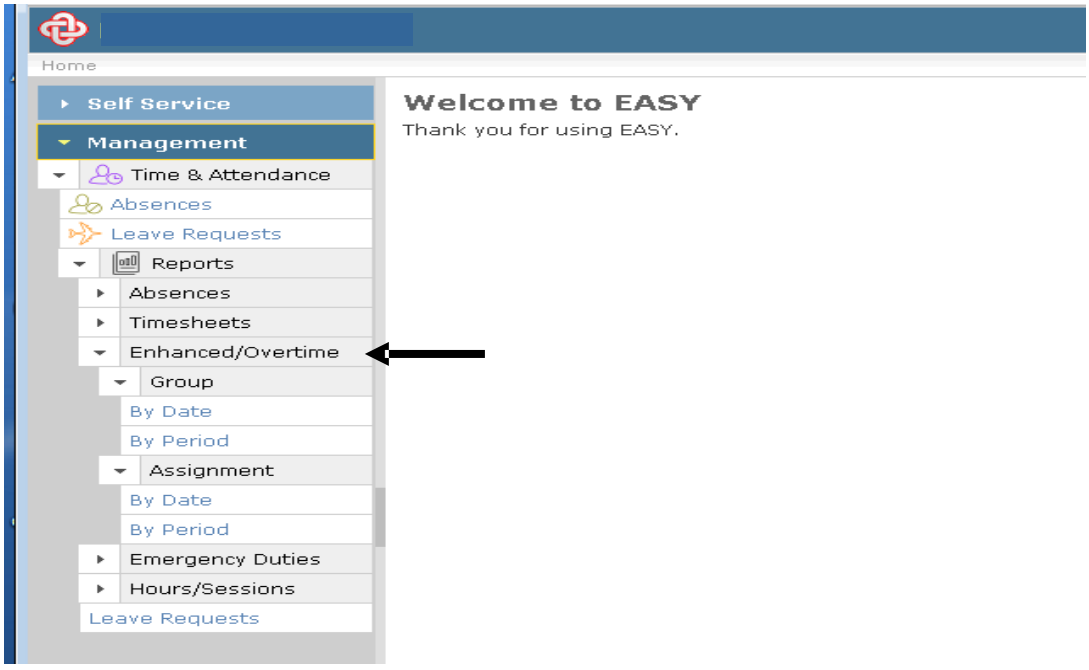
Time & Attendance Comments

Period Ending: 30-Apr-2014

Organisation	Name	Assignment Number	Comment		
			User ID	Date & Time	Detail
918 Hospital Servic	Employee Name (	12345678	21997167	01-Mar-2014 06:25:07	A/L 13/03/14 - 14/03/14
918 Hospital Servic	Employee Name (	12345678	11217681	28-Feb-2014 15:35:37	05/03/14 - in workfor an hour and a half then at New St for SHU Workshop
918 Hospital Servic	Employee Name (	12345678	11217681	28-Feb-2014 15:35:54	10/03/14 - 7.5 hours TOIL
918 Hospital Servic	Employee Name (	12345678	11221393	01-Mar-2014 16:49:58	annual leave 10 till 14 march
918 Hospital Servic	Employee Name (	12345678	11214737	02-Mar-2014 09:06:07	Four Days Annual Leave 1. Monday 17th March 2014 2. Tuesday 18th March 2014 3. Wednesday 19th March 2014 4. Thursday 20th March 2014
918 Manufacturing	Employee Name (	12345678	11217020	01-Mar-2014 13:19:36	1st march 2hr A/L 4th March A/L 11th - 15th A/L
918 Manufacturing	Employee Name (	12345678	23376448	01-Mar-2014 15:52:56	A/L 07/03/14 15 days A/L from 11/03/14 - 29/03/14
918 Manufacturing	Employee Name (	12345678	24076216	01-Mar-2014 17:45:18	Sat. 01/03/14 10.00-11.00 1 hour O/T
918 Manufacturing	Employee Name (	12345678	11225077	02-Mar-2014 08:23:58	04/03/14 -07/03/14 A/L
918 SN-OD Team	Employee Name (	12345678	21852099	01-Mar-2014 14:40:37	01.03-Embedded @ NUH

This report can be used to check the comments relating to a specific pay period. Any comments regarding Pay Adjustment should be checked before authorisation.

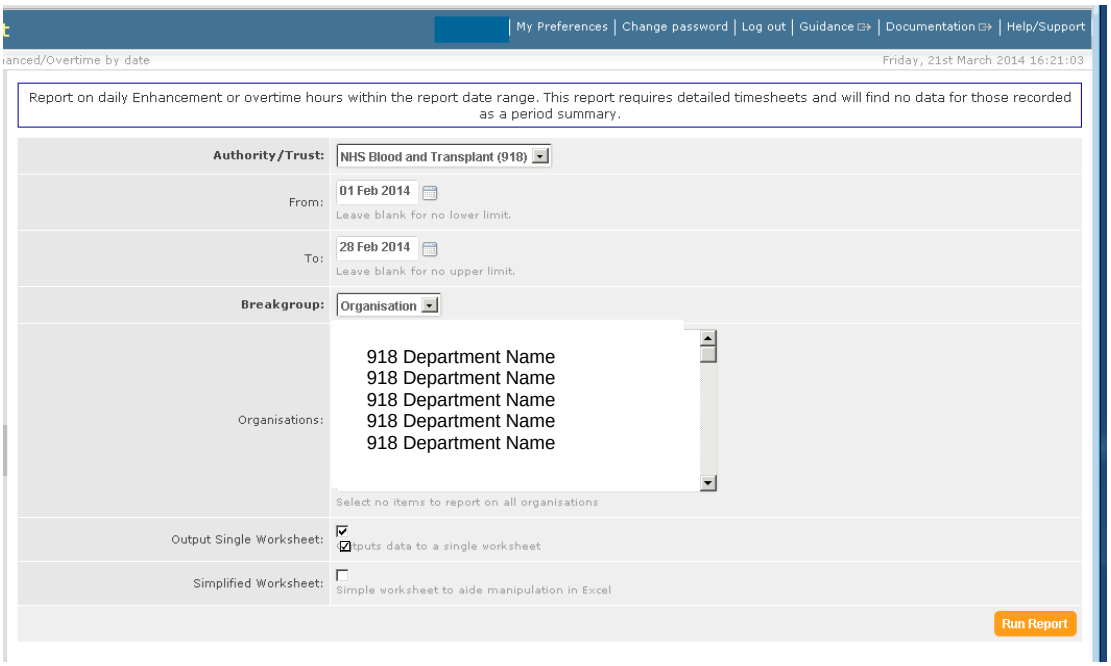
Opening the **Enhanced / Overtime** category (clicking on small black arrow) will give the following reports:



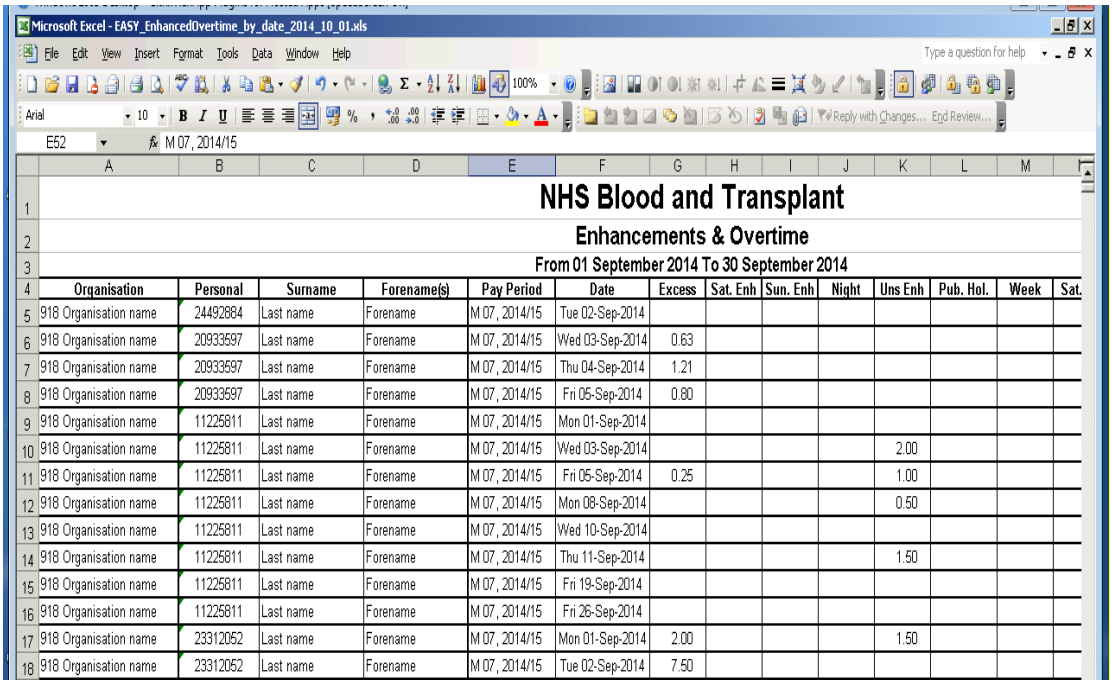
- Group
  - By Date: will list each day's enhancements and overtime claimed by each employee by organisation for a specific date range.
  - By Period: will report on the summary totals of enhancements and overtime claimed by each employee by pay period and organisation.
- Assignment
  - By Date: will list each day's enhancements and overtime claimed by an individual employee for a specific date range.

- By Period: will report on the summary totals of enhancements and overtime claimed by an individual employee for specified pay periods.

Example below is the Group > By Date report – for this report you are required to select Authority /trust, From and To dates, pick the organisation from the available list, tick the 'Output to single Worksheet' and 'Simplified Worksheet' then press Run Report.

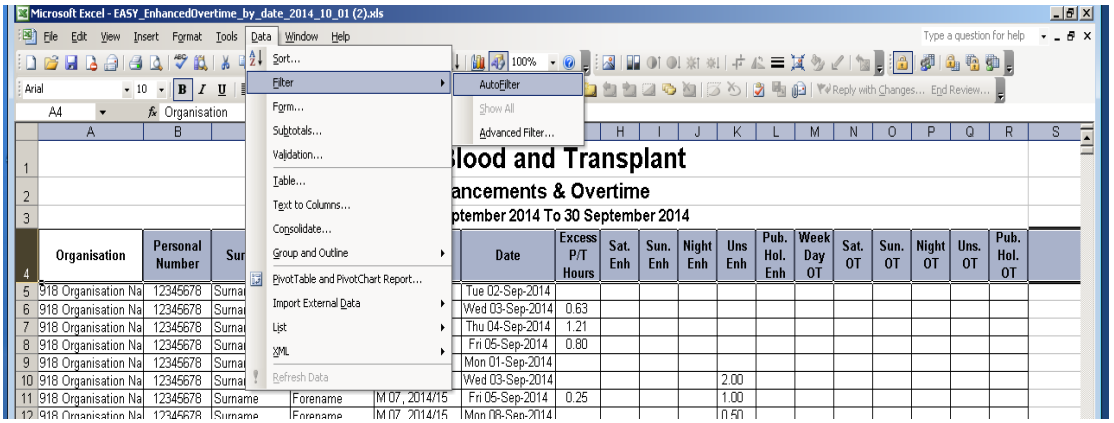


An excel report is generated which should be saved to your desired location.

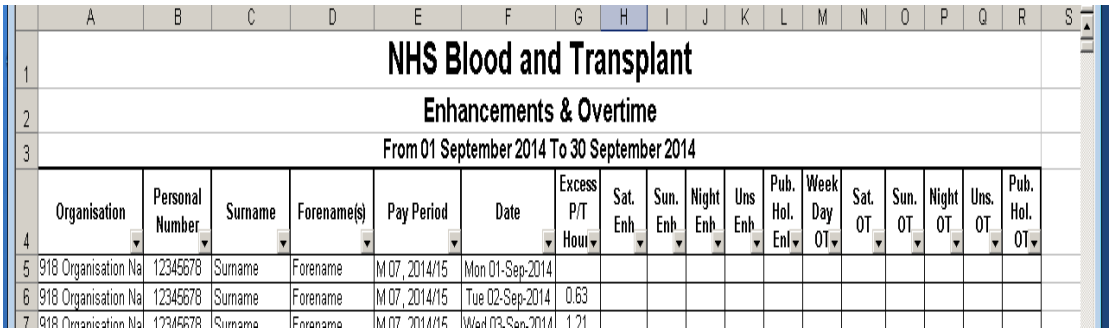


Organisation	Personal	Surname	Forename(s)	Pay Period	Date	Excess	Sat. Enh	Sun. Enh	Night	Uns Enh	Pub. Hol.	Week	Sat.
918 Organisation name	24492884	Last name	Forename	M 07, 2014/15	Tue 02-Sep-2014								
918 Organisation name	20933597	Last name	Forename	M 07, 2014/15	Wed 03-Sep-2014	0.63							
918 Organisation name	20933597	Last name	Forename	M 07, 2014/15	Thu 04-Sep-2014	1.21							
918 Organisation name	20933597	Last name	Forename	M 07, 2014/15	Fri 05-Sep-2014	0.80							
918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Mon 01-Sep-2014								
918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Wed 03-Sep-2014					2.00			
918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Fri 05-Sep-2014	0.25				1.00			
918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Mon 08-Sep-2014					0.50			
918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Wed 10-Sep-2014								
918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Thu 11-Sep-2014					1.50			
918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Fri 19-Sep-2014								
918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Fri 26-Sep-2014								
918 Organisation name	23312052	Last name	Forename	M 07, 2014/15	Mon 01-Sep-2014	2.00				1.50			
918 Organisation name	23312052	Last name	Forename	M 07, 2014/15	Tue 02-Sep-2014	7.50							

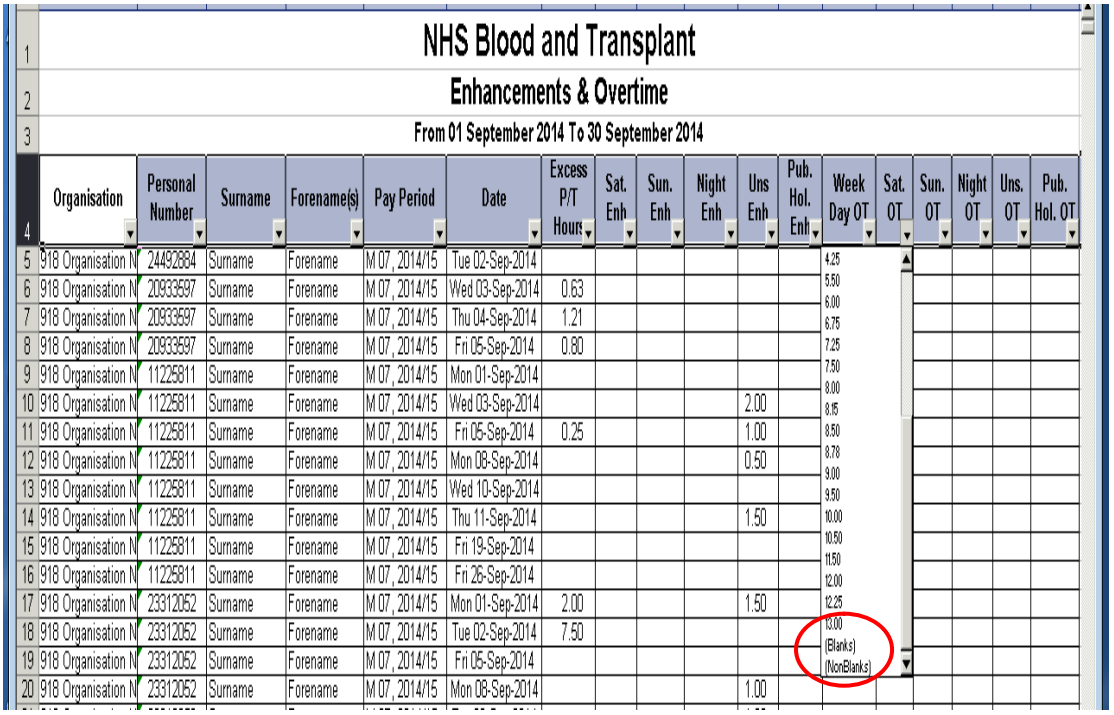
Add filters to the headers row by highlighting the headers row then click Data > filter > Auto filter from the toolbar.



Using a filter or combination of filters you can use the spreadsheet to check the entries:

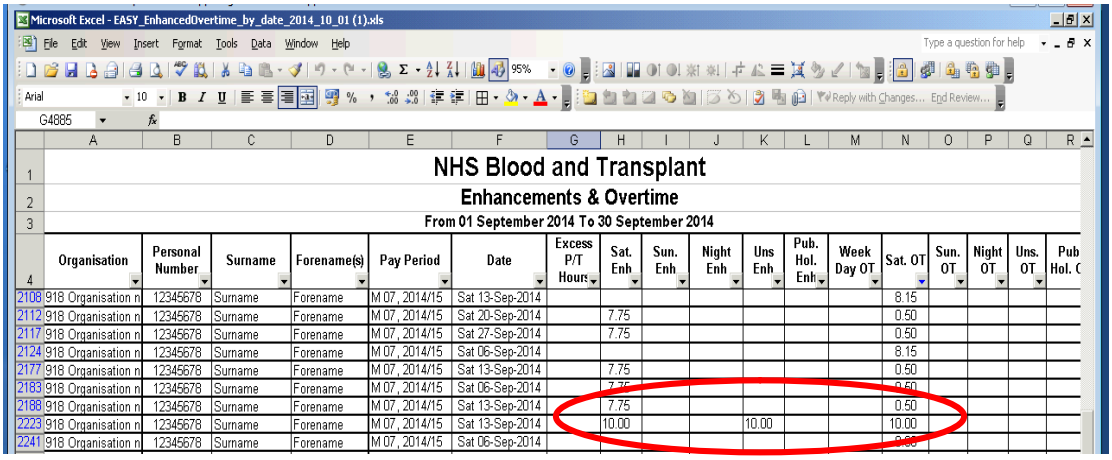


By filtering on the **Overtime column - non blanks** you can see if any employees have claimed enhancements and overtime on the same day:



***Enhancements and Overtime cannot be claimed for the same hours ***

The employee's timesheet entries should be checked if an employee has claimed enhancement and overtime hours on the same day for the same hours to determine if the entries are correct.



Microsoft Excel - EASY_EnhancedOvertime_by_date_2014_10_01 (1).xls

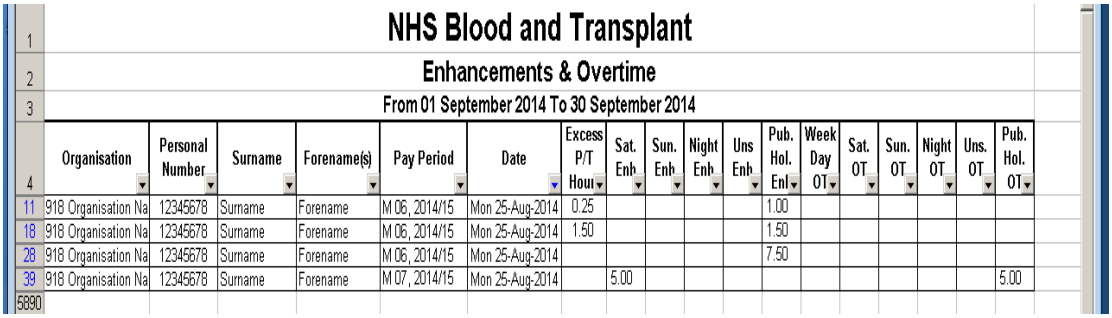
NHS Blood and Transplant

Enhancements & Overtime

From 01 September 2014 To 30 September 2014

	Organisation	Personal Number	Surname	Forename(s)	Pay Period	Date	Excess P/T Hours	Sat. Enh	Sun. Enh	Night Enh	Uns Enh	Pub. Hol. Enh	Week Day OT	Sat. OT	Sun. OT	Night OT	Uns. OT	Pub Hol. (
2108	918 Organisation n	12345678	Surname	Forename	M 07, 2014/15	Sat 13-Sep-2014								8.15				
2112	918 Organisation n	12345678	Surname	Forename	M 07, 2014/15	Sat 20-Sep-2014		7.75						0.50				
2117	918 Organisation n	12345678	Surname	Forename	M 07, 2014/15	Sat 27-Sep-2014		7.75						0.50				
2124	918 Organisation n	12345678	Surname	Forename	M 07, 2014/15	Sat 06-Sep-2014								8.15				
2177	918 Organisation n	12345678	Surname	Forename	M 07, 2014/15	Sat 13-Sep-2014		7.75						0.50				
2183	918 Organisation n	12345678	Surname	Forename	M 07, 2014/15	Sat 06-Sep-2014		7.75						0.50				
2188	918 Organisation n	12345678	Surname	Forename	M 07, 2014/15	Sat 13-Sep-2014		7.75						0.50				
2223	918 Organisation n	12345678	Surname	Forename	M 07, 2014/15	Sat 13-Sep-2014		10.00			10.00			10.00				
2241	918 Organisation n	12345678	Surname	Forename	M 07, 2014/15	Sat 06-Sep-2014								8.00				

By filtering on **Public Holiday date** you can see what has been claimed for a bank holiday by employees – and see if anyone has claimed Bank holiday overtime in error.



NHS Blood and Transplant

Enhancements & Overtime

From 01 September 2014 To 30 September 2014

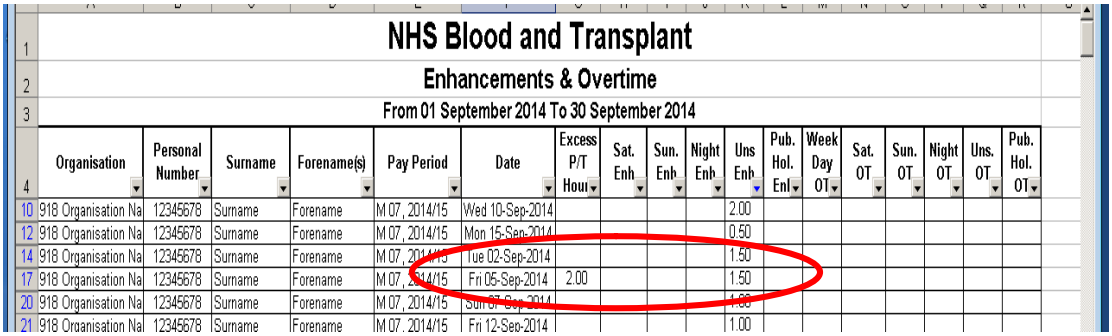
	Organisation	Personal Number	Surname	Forename(s)	Pay Period	Date	Excess P/T Hour	Sat. Enh	Sun. Enh	Night Enh	Uns Enh	Pub. Hol. Enh	Week Day OT	Sat. OT	Sun. OT	Night OT	Uns. OT	Pub. Hol. OT
11	918 Organisation Na	12345678	Surname	Forename	M 06, 2014/15	Mon 25-Aug-2014	0.25					1.00						
18	918 Organisation Na	12345678	Surname	Forename	M 06, 2014/15	Mon 25-Aug-2014	1.50					1.50						
28	918 Organisation Na	12345678	Surname	Forename	M 06, 2014/15	Mon 25-Aug-2014						7.50						
39	918 Organisation Na	12345678	Surname	Forename	M 07, 2014/15	Mon 25-Aug-2014		5.00										5.00
5890																		

The employee's timesheet entries should be checked to determine if the entries are correct.

Employees should claim Public Holiday Enhancement if the shift they work is a shift they would have worked if the day had not been a public holiday

Employees should claim Bank Holiday Overtime if the shift they work is an extra shift above full-time (37.5 hours) and is NOT a shift they would have worked if the day had not been a public holiday

By filtering on **Unsocial column - non blanks** you can see if any employees have claimed unsocial on a weekend date.



NHS Blood and Transplant

Enhancements & Overtime

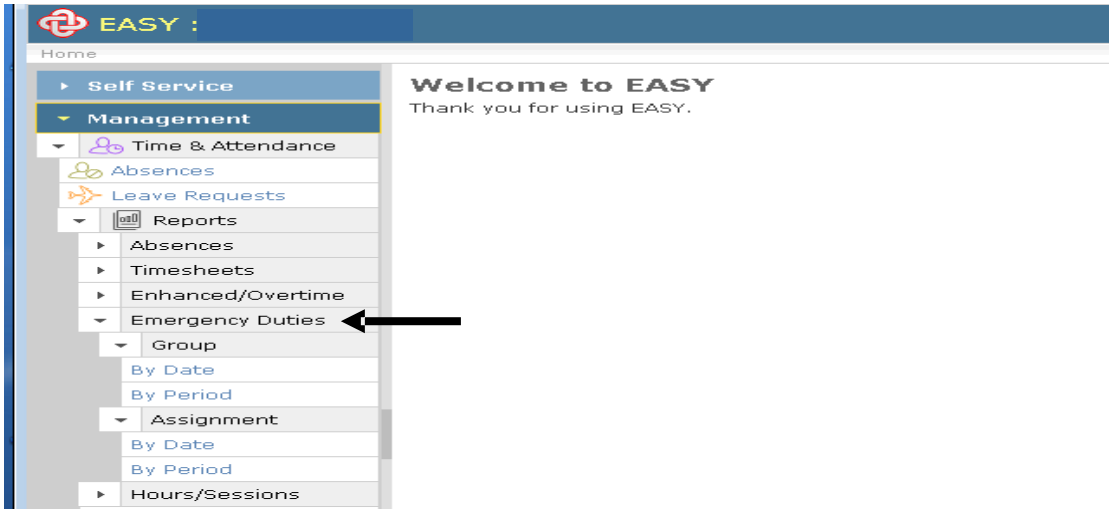
From 01 September 2014 To 30 September 2014

	Organisation	Personal Number	Surname	Forename(s)	Pay Period	Date	Excess P/T Hour	Sat. Enh	Sun. Enh	Night Enh	Uns Enh	Pub. Hol. Enh	Week Day OT	Sat. OT	Sun. OT	Night OT	Uns. OT	Pub. Hol. OT
10	918 Organisation Na	12345678	Surname	Forename	M 07, 2014/15	Wed 10-Sep-2014					2.00							
12	918 Organisation Na	12345678	Surname	Forename	M 07, 2014/15	Mon 15-Sep-2014					0.50							
14	918 Organisation Na	12345678	Surname	Forename	M 07, 2014/15	Tue 02-Sep-2014					1.50							
17	918 Organisation Na	12345678	Surname	Forename	M 07, 2014/15	Fri 05-Sep-2014	2.00				1.50							
20	918 Organisation Na	12345678	Surname	Forename	M 07, 2014/15	Sun 07-Sep-2014					1.00							
21	918 Organisation Na	12345678	Surname	Forename	M 07, 2014/15	Fri 12-Sep-2014					1.00							

The employee should be contacted to amend any incorrect entries.

*** Employees should claim either Saturday or Sunday Enhancement and not unsocial if the shift worked is on a weekend ***

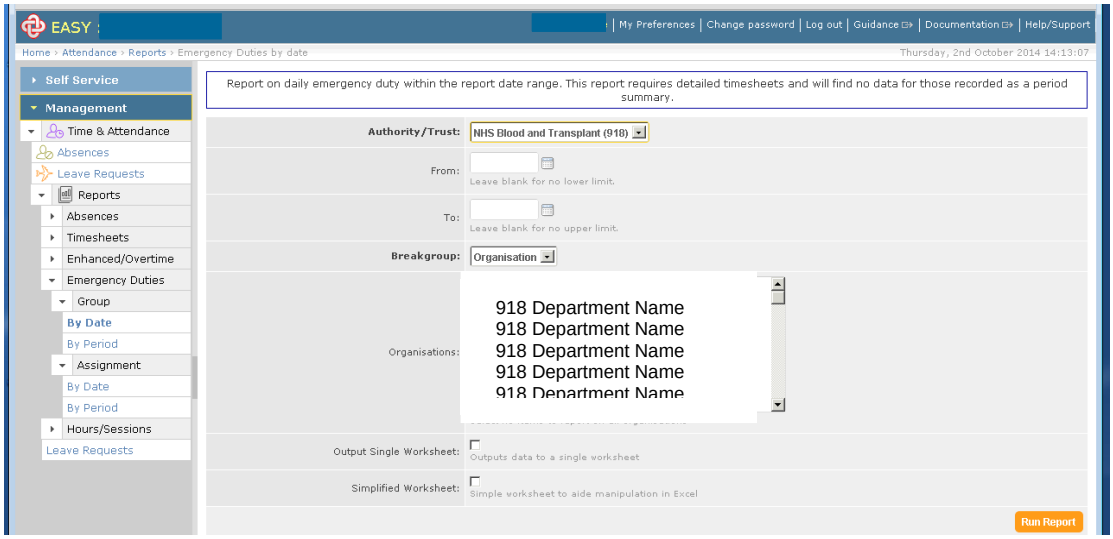
Opening the **Emergency Duties** category (clicking on small black arrow) will give the following reports:



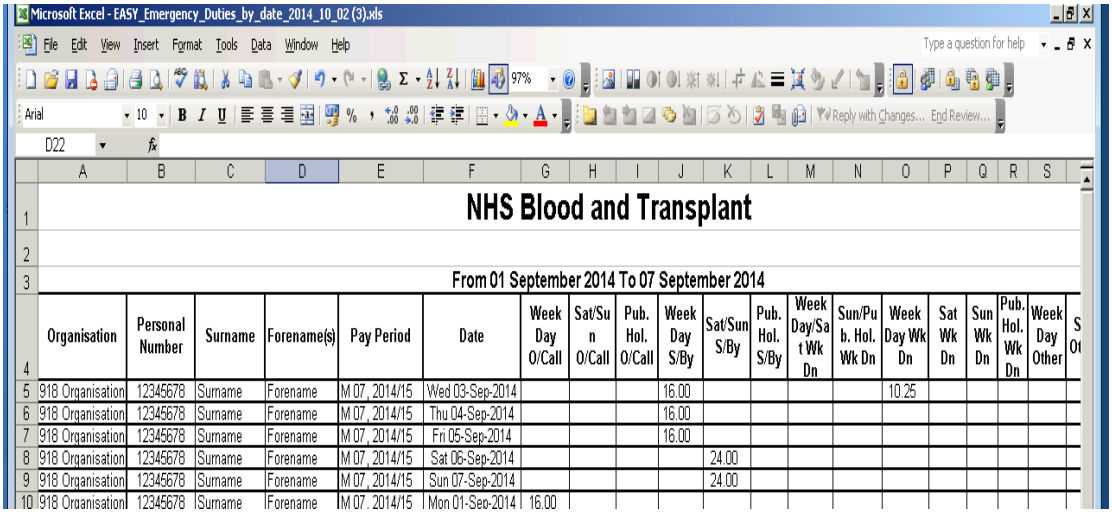
- Group
  - By Date: will list each day's on call / call outs claimed by each employee by organisation for a specific date range.
  - By Period: will report on the summary totals of on cal /call-outs claimed by each employee by pay period and organisation.

- Assignment
  - By Date: will list each day's on call / call outs claimed by an individual employee for a specific date range.
  - By Period: will report on the summary totals of on call / call-outs claimed by an individual employee for specified pay periods.

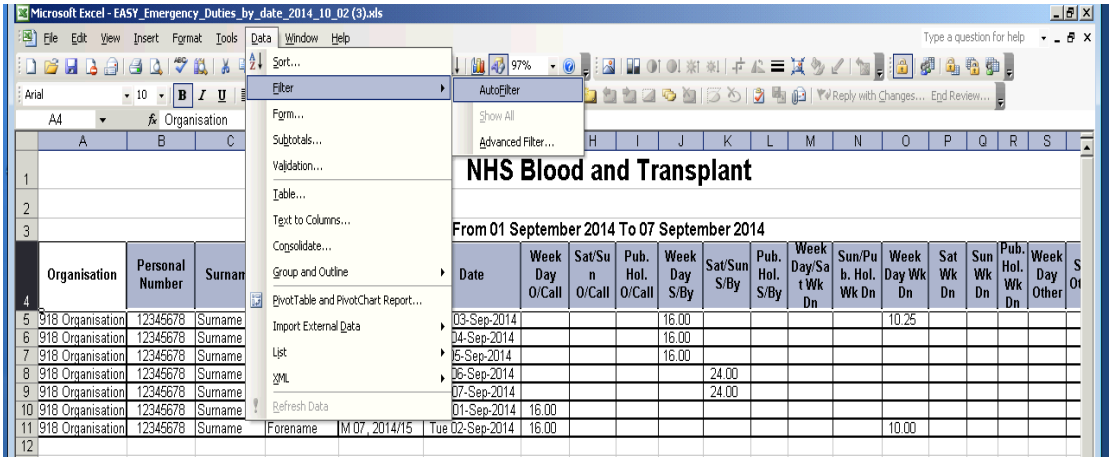
Example below is the Group > By Date report – select the required parameters and then press Run Report.



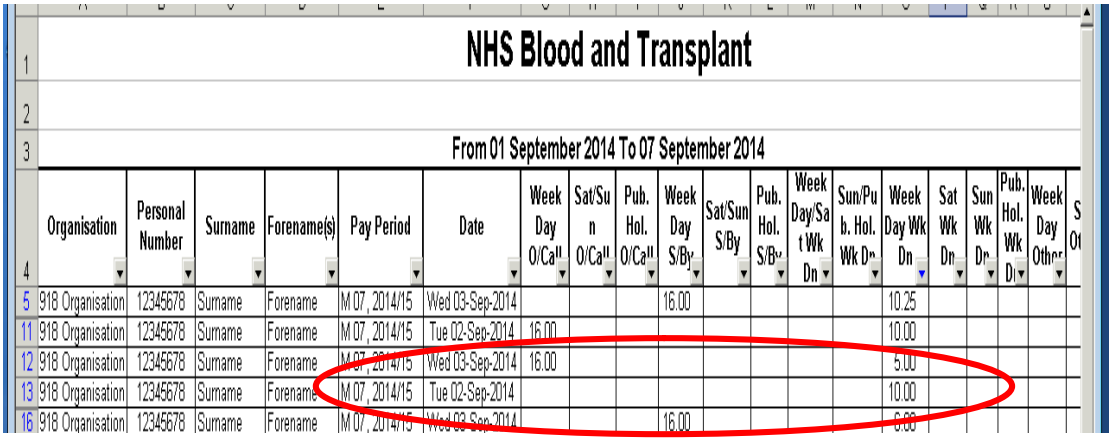
An excel report is generated which should be saved to your desired location.



Add filters to the headers row by highlighting the headers row then click Data > filter > Auto filter from the toolbar.



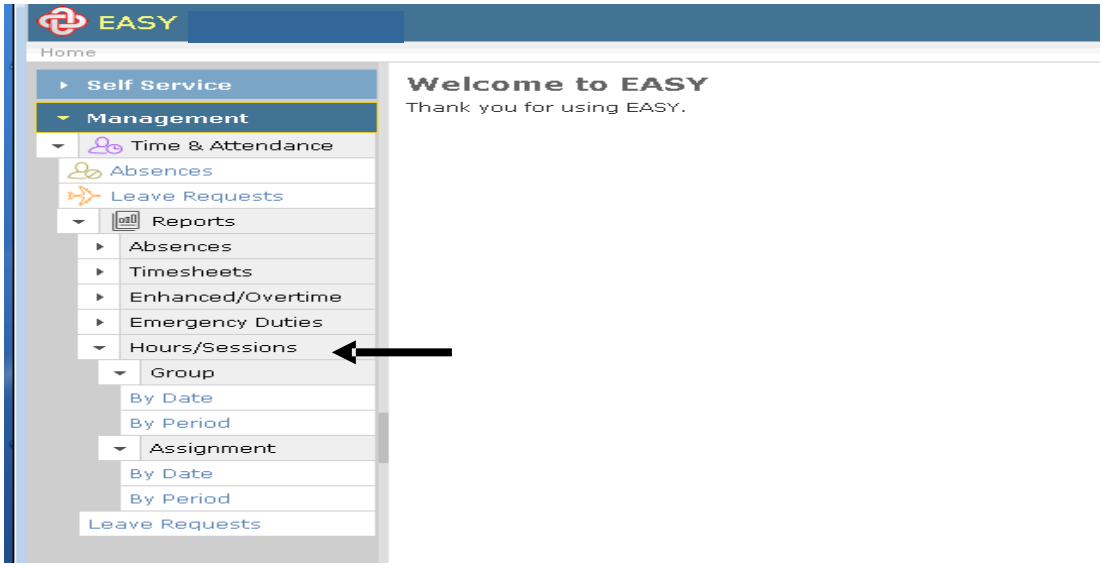
By filtering on each **Work Done & Other columns - non blanks** you can see if any employees have claimed work done on a day for which they were not on-call.



The employee should be contacted to determine if the entries are correct

Work done / Other hours can only be claimed if the employee was on-call

Opening the **Hours / Sessions** category (clicking on small black arrow) will give the following reports:



- Group Assignment
  - By Date: will list each day's enhancements, overtime, on call / call-outs claimed by each employee by organisation for a specific date range.
  - By Period: will report on the summary totals of enhancements, overtime, on call / call-outs claimed by each employee by pay period and organisation.

- Group Assignment
  - By Date: will list each day's enhancements, overtime, on call / call-outs claimed by an individual employee for a specific date range.
  - By Period: will report on the summary totals of enhancements, overtime, on call / call-outs claimed by an individual employee for specified pay periods.

These reports show all the **Enhanced / Overtime** and **Emergency Duties** entries claimed by the employees on the same report.

These reports can be used in place of the two reports above for checking by running the required report and using filters as described previously for the separate reports.

All reports will be available for 30 days after which they will be removed from the system. If you wish to keep the report you must save to the 'g' drive.