Payroll and Employee Services
MyView Reporting Services

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1 – Introduction

This document is a guide to using **Reporting Services** on MyView.

1.1 – What is Reporting Services on MyView?

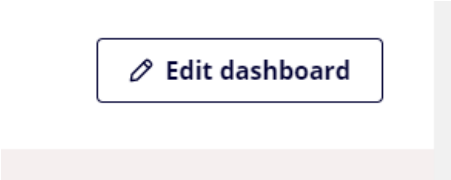
Reporting Services allows Managers to view real-time HR and Payroll information for employees in their reporting structure. Employees also have access to Reporting Services but will only see information relating to themselves.

This information can be accessed via MyView widgets that are fully integrated with the MyView Dashboard and presented in a format most suitable to summarise the data. MyView users can 'drag and drop' their most useful widgets onto their Dashboard and by clicking on the widgets will be able to view the underlying data.

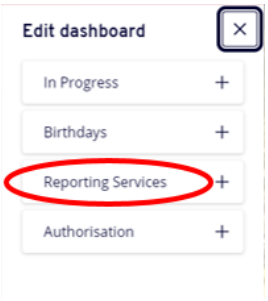
2 – How to add Reporting Services widgets to MyView Dashboard

To add a Reporting Services widget to your MyView Dashboard

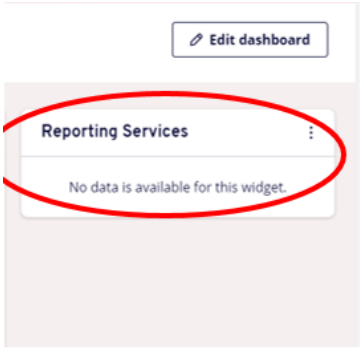
Click onto ‘Edit Dashboard’ on the top right hand-side



Select the 'Reporting Services' option.

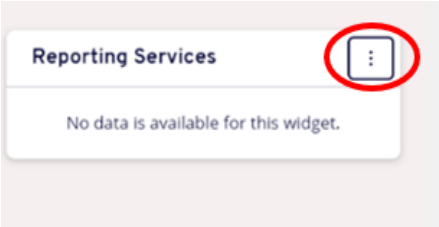


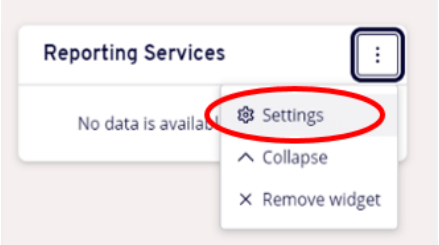
This will place the widget onto your MyView dashboard and ensure it will appear each time you are in MyView.

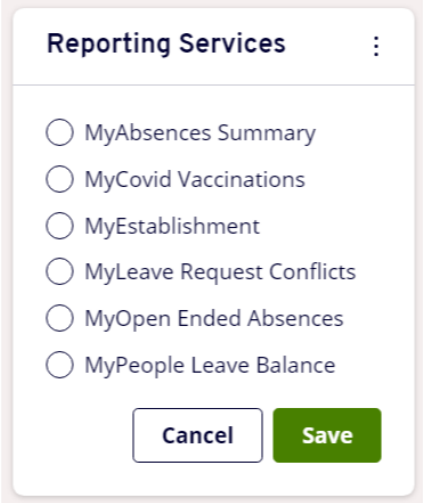


3 – Enabling a Reporting Service Widget

To enable a Reporting Services Widget, click the three ‘dots’ and select the relevant widget to be displayed by selecting settings and the relevant option, select save to add the widget to the dashboard:







4 – Saving and Exporting data from Reporting Services

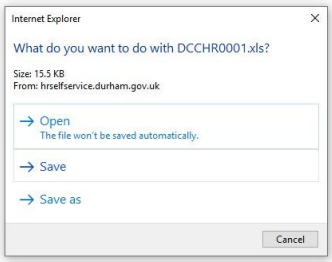
Reports can be saved or exported to PDF/Excel. Once a report is opened, locate the 'export' icon:

Please note that once exported the data displayed is 'as at' the time stamp as highlighted below:

Users can click on the **refresh icon** to refresh report with latest data if required

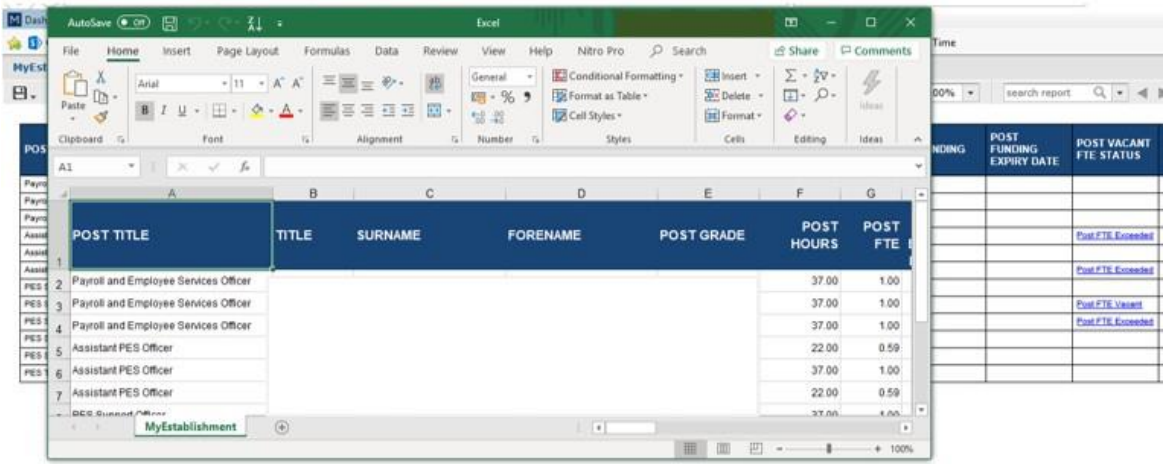
When you have selected to export, you will be presented with all available export options – including PDF and Excel formats.

Select the relevant format and you will be presented with the option to 'Open' or 'Save'



The report will then be exported to save to your device

(Data has been removed from the below screenshot for Data Protection)

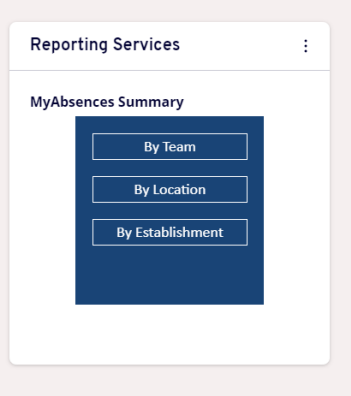

AutoSave
Excel
File Home Insert Page Layout Formulas Data Review View Help Nitro Pro Search
Share Comments
Paste
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
Clipboard Font Alignment Number Styles Cells Editing Ideas
A1
POST TITLE
TITLE
SURNAME
FORENAME
POST GRADE
POST HOURS
POST FTE
Payroll and Employee Services Officer 37.00 1.00
Payroll and Employee Services Officer 37.00 1.00
Payroll and Employee Services Officer 37.00 1.00
Assistant PES Officer 22.00 0.59
Assistant PES Officer 37.00 1.00
Assistant PES Officer 22.00 0.59
MyEstablishment
100%
POST FUNDING EXPIRY DATE
POST VACANT FTE STATUS
Post FTE Exceeded
Post FTE Exceeded
Post FTE Vacant
Post FTE Exceeded

5 – Reporting Services Widget

The following section provides an overview of each Reporting widget. Additional widgets will be added overtime to meet the management information needs of employees and managers.

5.1 MyAbsences Summary

This report allows managers to view **real-time** absence data either by team, by location, or by establishment.



The information contained in these reports is based on all current post holdings that report up to (and including) the manager. The absence data is calculated based on current employees who are recorded as absent (sickness, annual leave, compassionate leave).

To open the detailed report, you can click on one of the following options:

- **By Team** – this will provide you with a summary of current absences broken down by absence reason down to team level.
- **By Location** – this will provide you with a summary of current absences broken down by absence reason down to team level but split further by location.
- **By Establishment** – this will provide you with a summary of absence rates based on current absences – split by absence reason/group.

You can view the underlying data by clicking on any number in the summary report. Please refer to s6 on exporting and refreshing the data.

SERVICE	SERVICE AREA	TEAM	12.Sickness - Other	14.Flexi Leave	15.Maternity Leave	Total
Resources	Finance & Transactional Services	Payroll & Employee Services	1	3	1	5
		Team TOTAL	1	3	1	5
	Service Area TOTAL		1	3	1	5
Service Grouping TOTAL			1	3	1	5

The accurate recording of an employees' status in MyView is extremely important so that we can have accurate and consistent information for monitoring and reporting.

You will receive regular reminders to check that ongoing employees' absences are up to date and accurate in line with the above guidance on absence recording.

5.2 MyEstablishment

The MyEstablishment report allows managers to view real-time Establishment data including employee names, post titles, projected end-dates, organisation hierarchy information, post holding location and much more.

The initial widget summarises the number of posts within your team, total FTE posts, and the number of vacant posts.

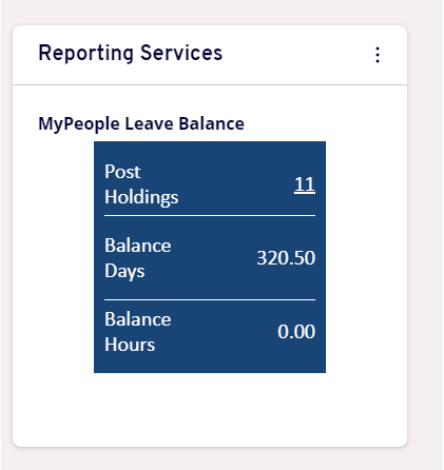
To open the detailed report, you can click on the number against 'Posts' or 'Vacant.'

Throughout the report, any fields marked blue (as below) can be selected to expand on the data available (additional data available will be dependent on your role within the organisation).

5.3 MyPeople Leave Balance

This reporting tool will allow managers to view the detailed leave information in real-time for your team members, including leave balances, days taken, carry forward leave, and purchased leave. This reporting analytic can be particularly helpful in ensuring employees are managing their annual leave. The analytic should also be reviewed in advance of the end of the leave year (March) to ensure employees have used their balance prior to the start of the leave year in April.

Please note that this analytic **does not** include leave balances for employees who do not use MyView to book leave.



To open the detailed report, you can click on the number against 'Post Holdings'

(Data has been removed from the below screenshot for Data Protection)

MyPeople Leave Balance — Data refreshed 2020-06-10 at 09:11:19

Position Status	Entitlement Days	Cfwd Days	Purchased Days	Extra Days	Taken/Booked Days	Balance Days	Entitlement Hours	Cfwd Hours	Purchased Hours	Extra Hours	Taken/Booked Hours	Balance Hours
PT	0.00	0.00	0.00	0.00	0.00	0.00	171.50	29.50	0.00	0.00	0.00	201.00
PT	0.00	0.00	0.00	0.00	0.00	0.00	171.50	162.00	0.00	0.00	242.00	91.50
FT	31.00	0.00	0.00	0.00	14.00	17.00	0.00	0.00	0.00	0.00	0.00	0.00
FT	13.00	0.00	0.00	0.00	6.50	6.50	0.00	0.00	0.00	0.00	0.00	0.00
FT	26.00	1.00	0.00	0.00	2.00	25.00	0.00	0.00	0.00	0.00	0.00	0.00
FT	31.00	3.00	0.00	0.00	0.00	34.00	0.00	0.00	0.00	0.00	0.00	0.00
PT	0.00	0.00	0.00	0.00	0.00	0.00	117.00	14.50	0.00	0.00	14.50	117.00
FT	31.00	6.00	0.00	0.00	0.00	37.00	0.00	0.00	0.00	0.00	0.00	0.00
FT	31.00	0.50	0.00	0.00	8.50	23.00	0.00	0.00	0.00	0.00	0.00	0.00
FT	31.00	7.00	0.00	0.00	0.00	38.00	0.00	0.00	0.00	0.00	0.00	0.00
FT	31.00	5.00	0.00	0.00	15.00	21.00	0.00	0.00	0.00	0.00	0.00	0.00

To view details of which days/hours have been taken – you can click on the number in 'Taken/Booked Days' column (for full-time employees) and the 'Taken/Booked Hours' column (for part-time or full-time compressed employees)

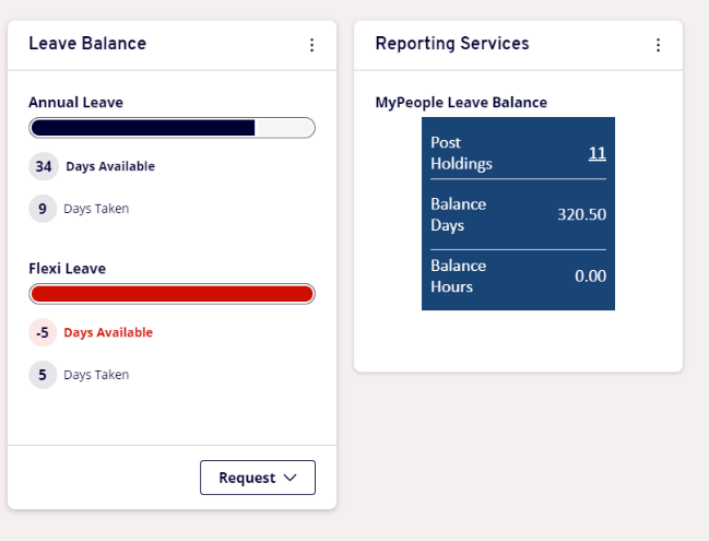
This will open the individuals leave taken report.

(Data has been removed from the below screenshot for Data Protection)

MyLeave Taken Employee — Data refreshed 2020-06-10 at 09:18:00

Post Title	Post Number	Employee Number	Surname	Forename	Start Date	Start Time	End Date	End Time	Days Taken	Hours Taken
Payroll and Employee Services Officer	0075255				13/05/2020	0830	13/05/2020	1700	1.00	7.50
Payroll and Employee Services Officer	0075255				22/05/2020	0830	22/05/2020	1630	1.00	7.00
Payroll and Employee Services Officer	0075255				09/09/2020	0830	25/09/2020	1630	13.00	96.00

The widget can be used as an employee to support the current 'Leave Balance' widget for more detailed data on your current leave balance. This includes a breakdown of carry forward and purchased leave, and a summary of which days/hours have been requested to result in your leave balance.



To open the detailed report, you can click on the number against 'Post Holdings'

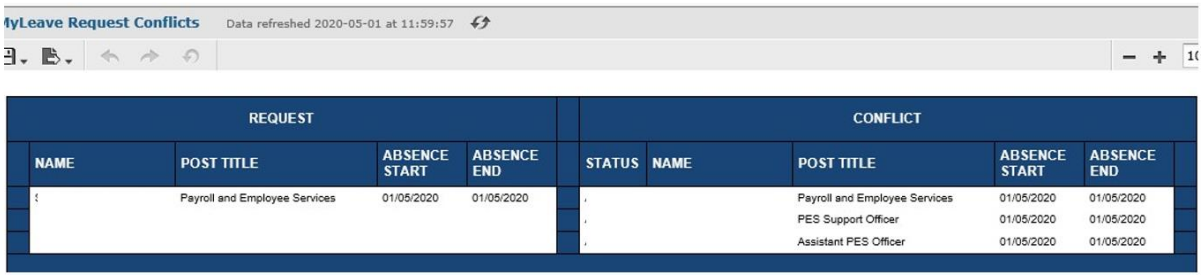
To view details of which days/hours have been taken – you can click on the number in 'Taken/Booked Days' column (for full-time employees) and the 'Taken/Booked Hours' column (for part-time or full-time compressed employees).

5.4 MyLeave Request Conflicts

This reporting tool will display any conflicting leave requests within your team in real- time. You will be alerted if a member of your team submits a leave request for a date on which other members of your team already have approved/submitted leave requests.

This analytic should be used to assist your decision making when approving annual leave requests. The report will help determine if there is sufficient team cover prior to approving a team member's leave.

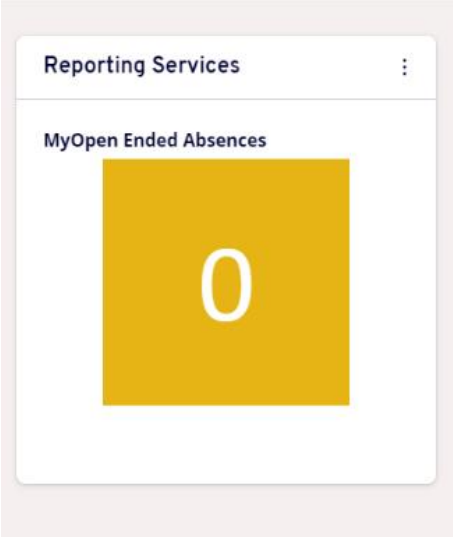
To open details of the conflicting requests, you should click the conflict number. The left-sided report displays details of the new request which has caused a conflict, whereas the right-sided report shows details of the other leave contributing to a conflict of dates.



From the information displayed, the manager would see that approval of the new leave request would result in four team members being absent on 01/05/2020. This will assist with the manager's decision-making process.

5.5 MyOpen Ended Absences

This reporting tool informs managers which employees in their reporting structure are currently recorded as being on open-ended sickness absence. The analytic acts as a reminder for managers to review open-ended absence, and end sickness accordingly when the employee returns to work. This allows for accurate sickness absence reporting and sickness entitlement.



To open details of the open-ended absences, you should click the number. The report will then open:

(Data has been removed from the below screenshot for Data Protection)

5.6 My Covid Vaccinations

This reporting tool informs managers which employees in their reporting structure are currently recorded as receiving the first, second and booster dose of their COVID19 vaccination.

The initial widget summarises the number of employees within your team, followed by a summary of employees with a first vaccination recorded, the number of second vaccinations recorded and the number of booster vaccinations recorded also.

To open the details of vaccinations, click on the number within the three options available, selecting the number of employees will present a report of everyone within the team displaying who has had a vaccination recorded.

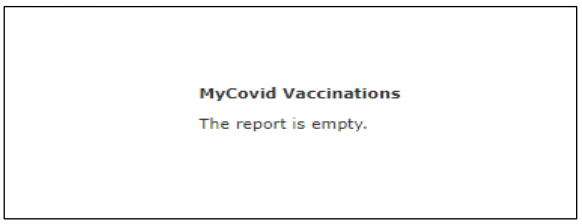
Selecting the number of first vaccinations will only display those who have a vaccination recorded, alike to selecting the second vaccination number or booster vaccination number.

Once selecting you will be presented with the following data:

(Data has been removed from the below screenshot for Data Protection)

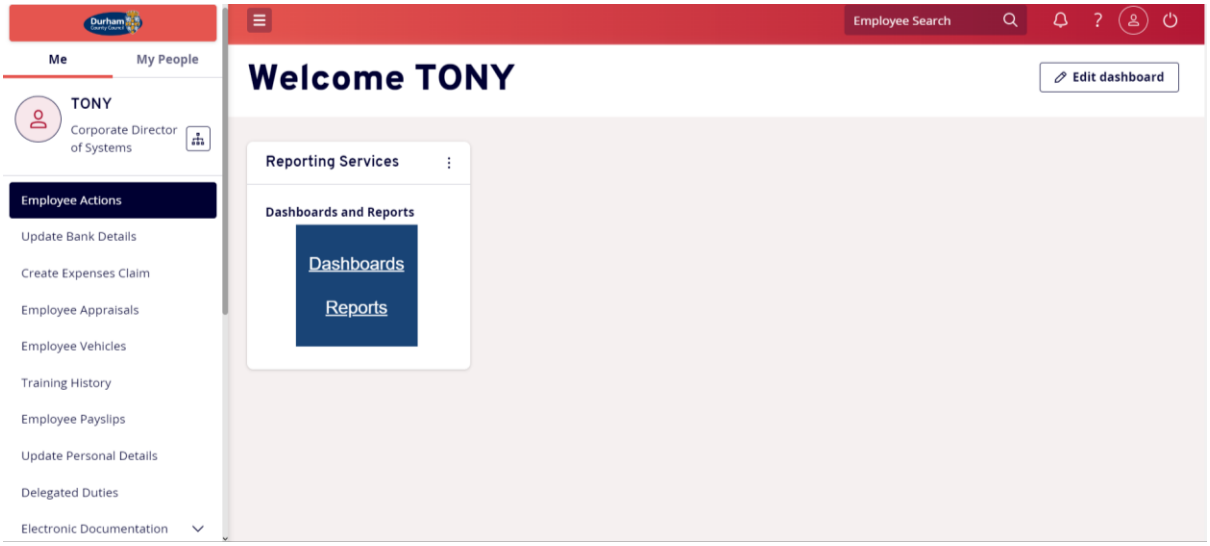
EMPLOYEE NUMBER	SURNAME	FORENAME	TITLE	POST NUMBER	POST TITLE	FIRST VACCINATION DATE	SECOND VACCINATION DATE	BOOSTER VACCINATION DATE
					Payroll and Employee Services Officer	12/06/2021	13/08/2021	

If no vaccinations have been recorded this will be demonstrated from the widget, the number will represent a zero next to either 'First,' 'Second' or 'Booster.' You will also be presented with the following report.



6 – Dashboard Reports

To access **Dashboard Reports**, select the option for **Dashboard Reports** on the Reporting Services widget. To open the **Dashboard Reports**, click onto the text within the Reporting Services widget.



This will then display **MyDashboards** that are available to view. To open the **Absence** dashboard, click on the **Absence** link under **MyDashboards**.

This will open reports that provide absence information on employees that are reporting into your hierarchy. You will be able to view the absence information summarised by your direct reports, select the relevant direct report to expand further into the hierarchy levels.

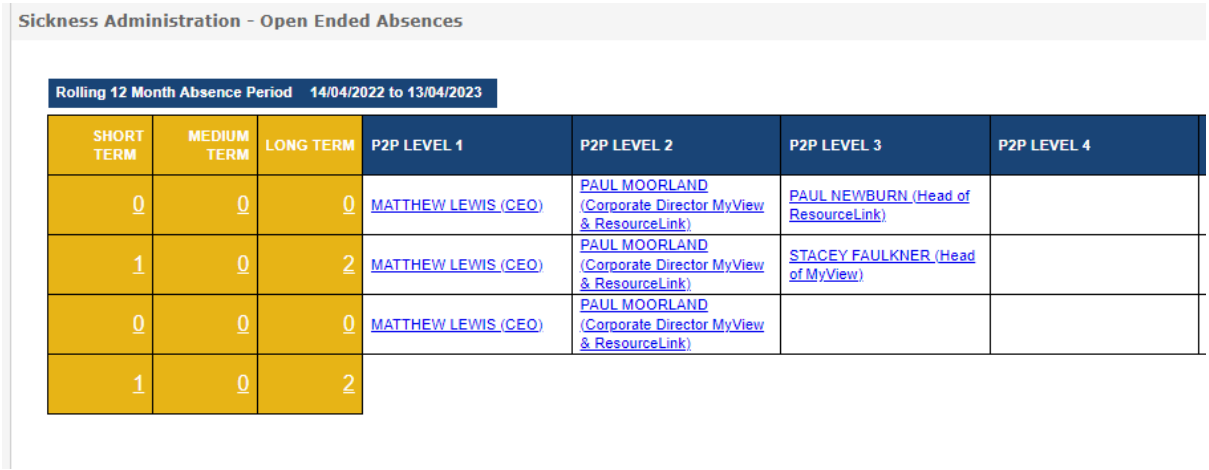
P2P LEVEL 1	P2P LEVEL 2	P2P LEVEL 3
MATTHEW LEWIS (CEO)	PAUL MOORLAND (Corporate Director MyView & ResourceLink)	PAUL NEWBURN (Head of ResourceLink)
MATTHEW LEWIS (CEO)	PAUL MOORLAND (Corporate Director MyView & ResourceLink)	STACEY FAULKNER (Head of MyView)
MATTHEW LEWIS (CEO)	PAUL MOORLAND (Corporate Director MyView & ResourceLink)	

6.1 – Sickness Administration – Open-Ended Absences

The **Open-Ended Absences** report will provide an overview of the current open-ended absences for employees reporting into you in the hierarchy based on -

- Short Term
- Medium Term
- Long Term

The absences can be broken down by Short Term, Medium Term and Long Term with numbers in the relevant boxes to advise how many absences are within that area. The relevant post to post level will then display a summary to advise where the Short Term, Medium Term and Long-Term absences are in the hierarchy.



Sickness Administration - Open Ended Absences

Rolling 12 Month Absence Period 14/04/2022 to 13/04/2023

SHORT TERM	MEDIUM TERM	LONG TERM	P2P LEVEL 1	P2P LEVEL 2	P2P LEVEL 3	P2P LEVEL 4
0	0	0	MATTHEW LEWIS (CEO)	PAUL MOORLAND (Corporate Director MyView & ResourceLink)	PAUL NEWBURN (Head of ResourceLink)	
1	0	2	MATTHEW LEWIS (CEO)	PAUL MOORLAND (Corporate Director MyView & ResourceLink)	STACEY FAULKNER (Head of MyView)	
0	0	0	MATTHEW LEWIS (CEO)	PAUL MOORLAND (Corporate Director MyView & ResourceLink)		
1	0	2				

To view further information on the absences behind the summarised figures, click the relevant number to open another report. This will open a report which will provide further information on the summarised figures. The report will include establishment and absence information for the employees summarised in the figures.

6.2 – Sickness Administration – Return to Work Interviews

The **Return to Work (RTW) Interviews** report will provide an overview on **Completed** and **Outstanding** RTW interviews within the rolling year for your hierarchy.

Sickness Administration - Return To Work Interviews

Rolling 12 Month Absence Period 20/01/2022 to 19/01/2023

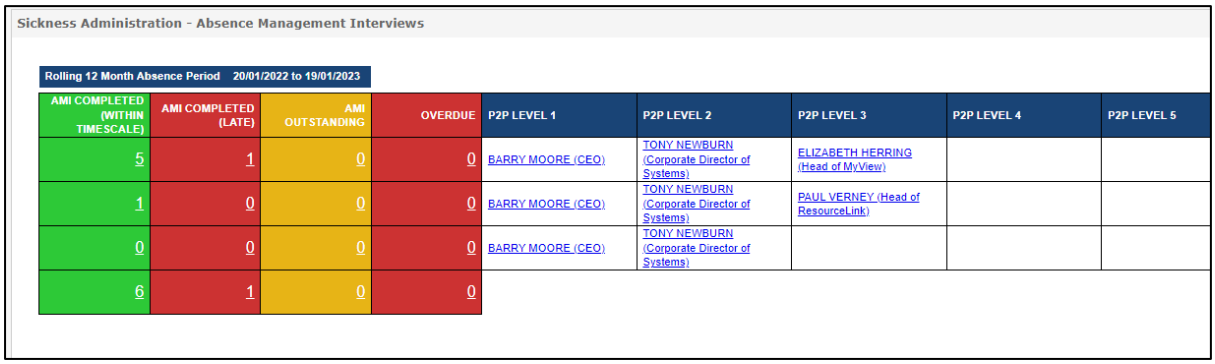
COMPLETED	OUTSTANDING	P2P LEVEL 1	P2P LEVEL 2	P2P LEVEL 3	P2P LEVEL 4	P2P LEVEL 5
15	0	BARRY MOORE (CEO)	TONY NEWBURN (Corporate Director of Systems)	ELIZABETH HERRING (Head of MyView)		
15	0	BARRY MOORE (CEO)	TONY NEWBURN (Corporate Director of Systems)	PAUL VERNEY (Head of ResourceLink)		
0	0	BARRY MOORE (CEO)	TONY NEWBURN (Corporate Director of Systems)			
30	0					

To view further information on the RTW interviews behind the summarised figures, click the relevant number to open another report. This will open a report which will provide further information on the summarised figures. The report will include establishment and absence information for the employees summarised in the figures.

6.3 – Sickness Administration – Absence Management Interviews

The **Absence Management Interviews (AMI) Interviews** report will provide an overview across the rolling year on the following –

- AMI Completed (Within Time Scales)
- AMI Completed (Late)
- AMI Outstanding
- Overdue



Sickness Administration - Absence Management Interviews

Rolling 12 Month Absence Period 20/01/2022 to 19/01/2023

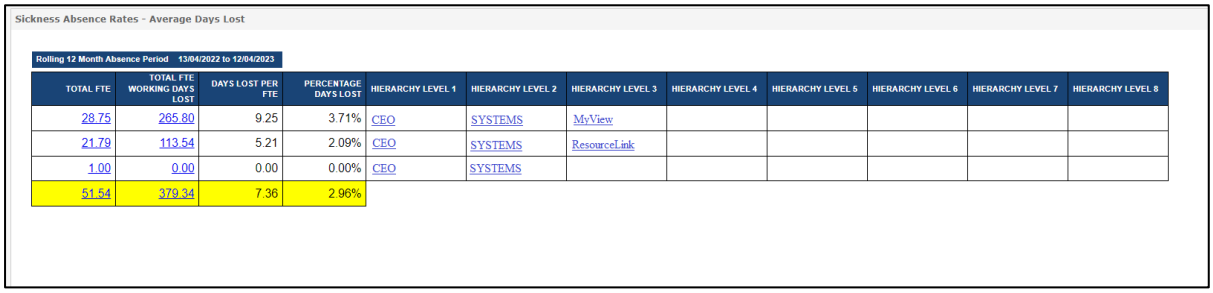
AMI COMPLETED (WITHIN TIMESCALE)	AMI COMPLETED (LATE)	AMI OUTSTANDING	OVERDUE	P2P LEVEL 1	P2P LEVEL 2	P2P LEVEL 3	P2P LEVEL 4	P2P LEVEL 5
5	1	0	0	BARRY MOORE (CEO)	TONY NEWBURN (Corporate Director of Systems)	ELIZABETH HERRING (Head of MyView)		
1	0	0	0	BARRY MOORE (CEO)	TONY NEWBURN (Corporate Director of Systems)	PAUL VERNEY (Head of ResourceLink)		
0	0	0	0	BARRY MOORE (CEO)	TONY NEWBURN (Corporate Director of Systems)			
6	1	0	0					

To view further information on the AMI interviews behind the summarised figures, click the relevant number to open another report. This will open a report which will provide further information on the summarised figures. The report will include establishment and absence information for the employees summarised in the figures.

6.4 - Sickness Absence Rates – Average Days Lost

The **Average Days Lost** report will provide an overview broken down by hierarchy, across the rolling year on the following –

- Total FTE
- Total FTE Working Days Lost
- Days Lost Per FTE
- Percentage Days Lost



Sickness Absence Rates - Average Days Lost

Rolling 12 Month Absence Period 13/04/2022 to 12/04/2023

TOTAL FTE	TOTAL FTE WORKING DAYS LOST	DAYS LOST PER FTE	PERCENTAGE DAYS LOST	HIERARCHY LEVEL 1	HIERARCHY LEVEL 2	HIERARCHY LEVEL 3	HIERARCHY LEVEL 4	HIERARCHY LEVEL 5	HIERARCHY LEVEL 6	HIERARCHY LEVEL 7	HIERARCHY LEVEL 8
28.75	265.80	9.25	3.71%	CEO	SYSTEMS	MyView					
21.79	113.54	5.21	2.09%	CEO	SYSTEMS	ResourceLink					
1.00	0.00	0.00	0.00%	CEO	SYSTEMS						
51.54	379.34	7.36	2.96%								

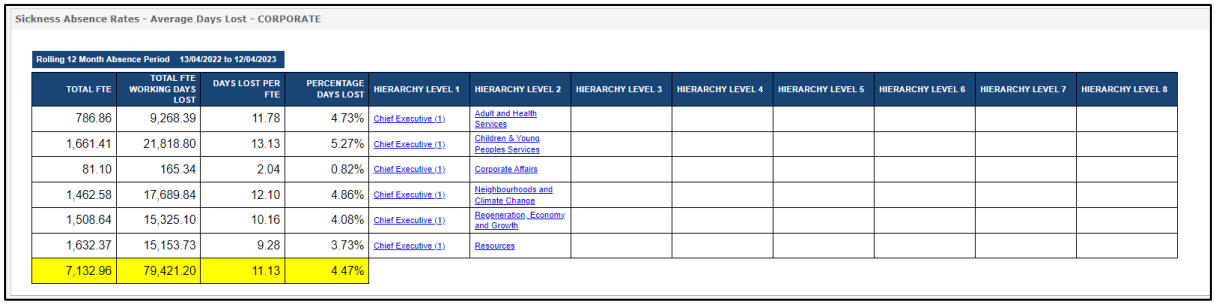
You can expand on the information behind the summarised figures for both **Total FTE** and **Total FTE Working Days Lost** by selecting the relevant figure. This will provide a further report on the establishment and absence information behind the summarised figures.

6.5 - Sickness Absence Rates – Average Days Lost – Corporate

The **Average Days Lost - Corporate** report will provide an overview broken down by hierarchy, across the rolling year on the following –

- Total FTE
- Total FTE Working Days Lost
- Days Lost Per FTE
- Percentage Days Lost

You will not be able to open the information behind the figures but will be able to navigate through different hierarchies for comparative figures.



Sickness Absence Rates - Average Days Lost - CORPORATE

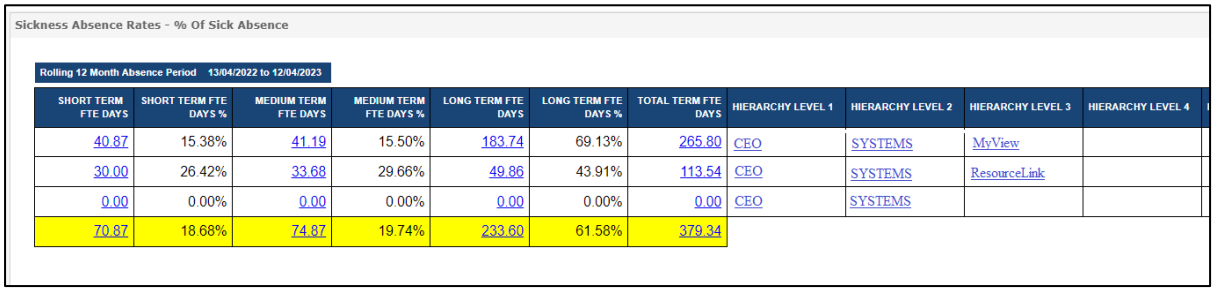
Rolling 12 Month Absence Period 13/04/2022 to 12/04/2023

TOTAL FTE	TOTAL FTE WORKING DAYS LOST	DAYS LOST PER FTE	PERCENTAGE DAYS LOST	HIERARCHY LEVEL 1	HIERARCHY LEVEL 2	HIERARCHY LEVEL 3	HIERARCHY LEVEL 4	HIERARCHY LEVEL 5	HIERARCHY LEVEL 6	HIERARCHY LEVEL 7	HIERARCHY LEVEL 8
786.86	9,268.39	11.78	4.73%	Chief Executive (1)	Adult and Health Services						
1,661.41	21,818.80	13.13	5.27%	Chief Executive (1)	Children & Young Peoples Services						
81.10	165.34	2.04	0.82%	Chief Executive (1)	Corporate Affairs						
1,462.58	17,689.84	12.10	4.86%	Chief Executive (1)	Neighbourhoods and Climate Change						
1,508.64	15,325.10	10.16	4.08%	Chief Executive (1)	Regeneration, Economy and Growth						
1,632.37	15,153.73	9.28	3.73%	Chief Executive (1)	Resources						
7,132.96	79,421.20	11.13	4.47%								

6.6 – Sickness Absence Rates - % of Sick Absence

The **% of Sick Absence** report will provide an overview broken down by hierarchy, across the rolling year on the following –

- Short Term FTE Days and Short-Term FTE Days %
- Medium Term FTE Days and Medium-Term FTE Days %
- Long Term FTE Days and Long-Term FTE Days %
- Total Term FTE Days



Sickness Absence Rates - % Of Sick Absence

Rolling 12 Month Absence Period 13/04/2022 to 12/04/2023

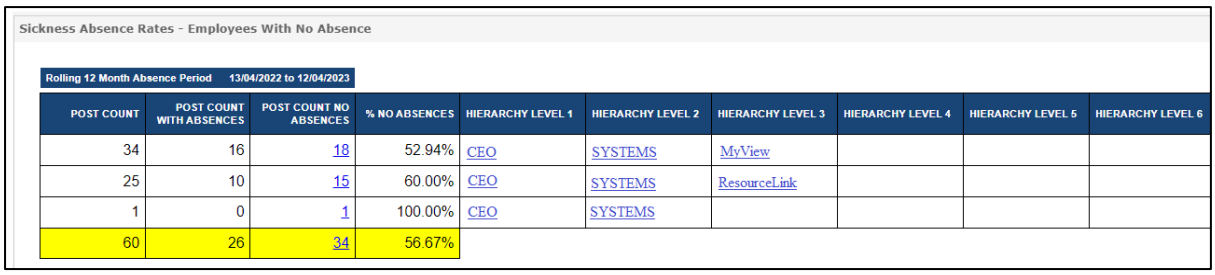
SHORT TERM FTE DAYS	SHORT TERM FTE DAYS %	MEDIUM TERM FTE DAYS	MEDIUM TERM FTE DAYS %	LONG TERM FTE DAYS	LONG TERM FTE DAYS %	TOTAL TERM FTE DAYS	HIERARCHY LEVEL 1	HIERARCHY LEVEL 2	HIERARCHY LEVEL 3	HIERARCHY LEVEL 4
40.87	15.38%	41.19	15.50%	183.74	69.13%	265.80	CEO	SYSTEMS	MyView	
30.00	26.42%	33.68	29.66%	49.86	43.91%	113.54	CEO	SYSTEMS	ResourceLink	
0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	CEO	SYSTEMS		
70.87	18.68%	74.87	19.74%	233.60	61.58%	379.34				

You can expand on the information behind the summarised figures for all **FTE Days** on each term and **Total Term FTE Days** by selecting the relevant figure. This will provide a further report on the establishment and absence information behind the summarised figures.

6.7 – Sickness Absence Rates – Employees with No Absences

The **Employees with No Absence** report will provide an overview broken down by hierarchy, across the rolling year on the following –

- Post Count
- Post Count with Absences
- Post Count No Absences
- % No Absences



Sickness Absence Rates - Employees With No Absence

Rolling 12 Month Absence Period 13/04/2022 to 12/04/2023

POST COUNT	POST COUNT WITH ABSENCES	POST COUNT NO ABSENCES	% NO ABSENCES	HIERARCHY LEVEL 1	HIERARCHY LEVEL 2	HIERARCHY LEVEL 3	HIERARCHY LEVEL 4	HIERARCHY LEVEL 5	HIERARCHY LEVEL 6
34	16	18	52.94%	CEO	SYSTEMS	MyView			
25	10	15	60.00%	CEO	SYSTEMS	ResourceLink			
1	0	1	100.00%	CEO	SYSTEMS				
60	26	34	56.67%						

You can expand on the information behind the summarised figures for **Post Count No Absences** by selecting the relevant figure. This will provide a further report on the establishment and absence information behind the summarised figures.

7 - Help and Guidance

If you require any further support, please contact the MyView helpdesk on 03000 269919. Alternatively, please e-mail MyView@durham.gov.uk