



Running Reports

Purpose:

This guide will show you how to **Run Reports** in Your HR.

The following standard Your HR reports have been made available to both the inputter and authoriser roles. Guidance on how to run these reports will be found in the section.

Folder and Report Name	Report Description
Link: People Reports	
Employee Information Check	This report will display the person details for all employees within the selected structure as of the effective date and can be given to your employees to check and amend to ensure their details are up to date
New Starters	This report will list the new starters within a specified date range <i>Note: this excludes new additional positions</i>
Organisation Leavers	This report will show the employees who have left your organisation <i>Note: this excludes ended positions</i>

Link: Structure Reports	
Employees with Multiple Positions	This report will show details of employees who have more than one position for the selected Unit/Employee as of the reporting effective date
Position and Structure Details	This can be used as an employee listing for your school or academy. You can narrow the results for a specific unit within your structure if required <i>Note: the report is sorted by Unit and also includes vacant positions</i>

Link: Absence Reports	
Absence History	<p>Use this report to show the absences for a unit(s) during a required period. The report will show you the absence type, reason, days and hours lost per absence. You can use the parameters to run the report for specific absence groups and types only if needed</p> <p><i>Note: the report is sorted by alphabetical order of Surname</i></p>
Absence History - People	<p>This report can be used to view the absence history for an employee. You can use the parameters to run the report for specific absence groups and types only if needed</p>

OSP Expiry Report

This report shows the 'Last day of entitlement to pay at 100%' and the 'Last day of entitlement to pay at 50%' and includes basic details of the absence record.

You must NOT run this report whilst contracts are locked as the payroll process can be affected!

If using this report, you must pay particular attention to the report parameters as noted below.

For each employee on the report, it will show the following message:

- At the start of the absence, entitlement to pay is [nnn] percent to indicate that the employee is not on full pay at the start of the absence, and
- Last day of entitlement to pay at [nnn] percent is [dd/mm/yy] to indicate when a band of entitlement is due to change. This message may appear more than once per employee, dependant on the length of service.

Note: the column on the report for 'Payroll Name' will show as not attached if the absence dates were before the start of the parallel run

Parameters

Unit / Smart Group

Select a specific Unit or a Smart Group that you have created

Effective date

enter the start of the current period

Calculate to

enter the **end** of the pay period (absences will be calculated up to this date). Absences relating to a period earlier than the range specified will be included if the input date falls within the date range

Ignore absence end dates:

do not tick this (if you tick this it will report on employees whose absence has been ended)

Mark results as reported	tick this box to prevent the reported absences being included in later runs of the reports
Show previously reported results	tick this box if you want the report to include previously reported absences
Sort sequence	sorts by alphabetical order of Surname as default – amend this if required
New page for each organisation unit	If selected each organisation unit will be displayed on a separate page
Output type	Change to .CSV if exporting data to Excel
Report run comments	Enter any comments to annotate the report

How to run your reports

- From the homepage, click on Management information reports
- The following will appear:



- To view the reports available under each option, click on the appropriate link then click on Run Reports. The reports will be shown on the left hand side. The following are examples of reports that are available under People Reports:



- Enter the effective date for the report. If the report parameters include start and end date parameters, then set your effective date to today's date
- The report parameters are shown

- Amend the parameters as required The example below shows the parameters for a New starters report:

New starters (as of 03/04/2023)

[▼ MENU](#)
[↻](#)
[🖨](#)

Organisation start point* 🔍

Organisation view* ▼

Start date* 📅

End date* 📅

Show details

Full path display

Include cover pages

Output type ▼

Report run comments

Run

- Each report will have different mandatory fields so enter the parameters as required
- Select the Output type. If you need to export the data to Excel, select .CSV
- Click RUN
- The message, *“Generating report ‘New Starters’. You will be notified upon its completion”* will be displayed

New Starters

📘 Generating report "New Starters". You will be notified upon its completion.

- You should receive an email notifying you once the report has run. Also, you can go to your to do list, click on **Processes** and as long as the status shows as 'Complete', you can click on the report name to download

TO DO LIST (1)

PROCESSES (0)

Report - New Starters, Warwickshire County Council

COMPLETE 27/01/2023 12:50

- Click on the entry in the Processes list download icon, the following screen will be displayed:

The screenshot shows a dark blue header with the text 'Download output New Starters'. To the right of the header are three icons: a dropdown menu labeled 'MENU', a refresh icon, and a print icon. Below the header, the text 'View output from' is followed by a dropdown menu currently set to 'Today'. A horizontal line separates this from the 'Available report outputs' section. This section contains a table with the following columns: 'Run date & time', 'Comments', 'Download', and 'Delete Select all'. A single row is visible with the run date '27/01/2023 12:55'. Under the 'Download' column for this row is a downward-pointing arrow icon. Under the 'Delete Select all' column is a small square checkbox. Below the table is a red 'Delete' button.

- Click the Download icon to download the file. 
- The file will be downloaded and be shown at the bottom of the screen, click the file to open. The output is displayed on the screen with the report header on page 1

iTrent



Warwickshire County Council

New Starters

3 Pages
 Run Date: 27/01/2023
 Run Time: 12:55:33
 Run by: 00347
 Role: Warwickshire Test School - Inputter

Parameters

Start Date: 03/04/2023	Organisation Start Point: Warwickshire Test School	Organisation View: Full
End Date: 03/04/2023		Path Display: Full

- The contents of the report are on the following page(s). If no records are found, the following message is displayed on the report:

No records have been returned for the selected parameters