

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 unsubmitted 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.

:	My Preferences Change password Log out Guidance ⇔ Documentation ⇔ Help/Support
ences By Extracted Period	Friday, 21st March 2014 16:09:46
	Report on absences marked as extracted to ESR by the period they were extracted in to.
Period:	NHS Blood and Transplant (918): Period 10/2013 (Calendar Month) ending 31st January 2014 (Closed for input)
Breakgroup:	Organisation 💌
Organisations:	918 Department Name 918 Department Name 918 Department Name 918 Department Name 918 Department Name 918 Department Name 918 Department Name
Absence Types:	Medical Suspension Paid Part Day Training Paternity Adoption Paternity Birth Sickness Special Increasing Bal Umpaid Authorised Special (Days) Umpaid Authorised Special (Mrs) Select no Items to report on all types
Output Single Worksheet:	Couputs data to a single worksheet
Simplified Worksheet:	Nimple worksheet to aide manipulation in Excel
	Run Report

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

	A1 🕶 🍂	NHS Blood	and Transp	olant														20	
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						NHS Blood	and	Trans	plant										
			NHS Bloc	d and Trai	nsplant (9	18): Period 06/2013 (Ca	ilendar N	lonthì en	dina 30th Si	epten	nber 2013 ((Closed fo	or inputì						
	Organisation	Personal Number	Surname	Forename(s)	Absence Type	Absence Reason	Reason Detail	Injury	First Day of Absence	Cont Abs.	Last Day of Absence	Absenc e Start Time	Absenc e End Time	No. Calen dar Davs	Hours	AfC Hours First Perio	AfC Hours Last Period	Record Type	
9	918 Department name	56987456	Surname	Forename	• •Sickness	Other known causes - not elsewhere classified		Surgery Related	20-Jun-2013		18-Aug-2013			60				Modify	
ş	918 Department name	56987456	Surname	Forename	Sickness	Gastrointestinal problems	Vomiting		14-Aug-2013		14-Aug-2013			1				Add	
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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 unsubmitted 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.

	My Preferences Change password Log out Guidance ⊕ Documentation ⊕ Help/Support
nments	Tuesday, 25th March 2014 15:06:23
	Report on any comments made on a timesheet meeting the specified criteria
Period:	NHS Blood and Transplant (918): Period 01/2014 (Calendar Month) ending 30th April 2014 (Input ending 31st March 2014)
Status:	Any Note: Active does not include extracted or withdrawn items, Any includes all items regardless of status (including withdrawn)
Breakgroup:	Organisation 💌
Organisations:	918 Department Name 918 Department Name 918 Department Name 918 Department Name 918 Department Name
Output Single Worksheet:	✓ Outputs data to a single vorksheet
Simplified Worksheet:	👿 Simple worksheet to aide manipulation in Excel
	Run Report

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

NHS Blood and Transplant

-	Microsoft Excel - EAS	Y_Comments_201	4_03_25 (1).xls			
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1				NHS	S Blood and	d Transplant
2				Tir	ne & Attendan	ce Comments
3	Period Ending:	30-Apr-2014				
4						Comment
5 6 7	Organisation	Name	Assignment Number	User ID	Date & Time	Detail
8	918 Hospital Servi	Employee Name	12345678	21997167	01-Mar-2014 06:25:07	A/L 13/03/14 - 14/03/14
9	918 Hospital Servio	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
10	918 Hospital Servio	Employee Name	12345678	11217681	28-Feb-2014 15:35:54	10/03/14 - 7.5 hours TOIL
1	918 Hospital Servio	Employee Name	12345678	11221393	01-Mar-2014 16:49:58	annual leave 10 till 14 march
1:	918 Hospital Servio	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
1:	918 Manufacturing	Employee Name	12345678	11217020	01-Mar-2014 13:19:36	1 st march 2hr A/L 4th March A/L 11th - 15th A/L
1.	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
1!	918 Manufacturing	Employee Name	12345678	24076216	01-Mar-2014 17:45:18	Sat. 01/03/14 10:00-11:00 1 hour O/T
10	918 Manufacturing	Employee Name	12345678	11225077	02-Mar-2014 08:23:58	04/03/14 -07/03/14 A/L
117	' 918 SN-OD Team -	Employee Name	12345678	21852099	01-Mar-2014 14:40:37	I01.03-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:

æ	
Home	
▶ Self Service	Welcome to EASY
🝷 Management	Thank you for using EASY.
- 😓 Time & Attendance	
🕹 Absences	
🦻 Leave Requests	
- Reports	
 Absences 	
 Timesheets 	
- Enhanced/Overtime -	—
- Group	
By Date	
By Period	
 Assignment 	
By Date	
By Period	
 Emergency Duties 	
 Hours/Sessions 	
Leave Requests	

• 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.

:	My Preferences Change password Log out Guidance ⊟> Documentation ⊟> Help/Support
anced/Overtime by date	Friday, 21st March 2014 16:21:03
Report on daily Enhancement or overtime hou	rs within the report date range. This report requires detailed timesheets and will find no data for those recorded as a period summary.
Authority/Trust:	NHS Blood and Transplant (918)
From:	01 Feb 2014 Eeave blank for no lover limit.
To:	28 Feb 2014 Leave blank for no upper limit.
Breakgroup:	Organisation 💌
Organisations:	918 Department Name 918 Department Name 918 Department Name 918 Department Name 918 Department Name 918 Department Name
Output Single Worksheet:	₩ Ørputs data to a single worksheet
Simplified Worksheet:	Simple vorksheet to aide manipulation in Excel
	Run Report

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

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2						Enhance	ments	& Ove	ertime					
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4	Organisation	Personal	Surname	Forename(s)	Pay Period	Date	Excess	Sat. Enh	Sun. Enh	Night	Uns Enh	Pub. Hol.	Week	Sat.
5	918 Organisation name	24492884	Last name	Forename	M 07, 2014/15	Tue 02-Sep-2014								
6	918 Organisation name	20933597	Last name	Forename	M 07, 2014/15	Wed 03-Sep-2014	0.63							
7	918 Organisation name	20933597	Last name	Forename	M 07, 2014/15	Thu 04-Sep-2014	1.21							
8	918 Organisation name	20933597	Last name	Forename	M 07, 2014/15	Fri 05-Sep-2014	0.80							
9	918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Mon 01-Sep-2014								
10	918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Wed 03-Sep-2014					2.00			
11	918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Fri 05-Sep-2014	0.25				1.00			
12	918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Mon 08-Sep-2014					0.50			
13	918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Wed 10-Sep-2014								
14	918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Thu 11-Sep-2014					1.50			
15	918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Fri 19-Sep-2014								
16	918 Organisation name	11225811	Last name	Forename	M 07, 2014/15	Fri 26-Sep-2014								
17	918 Organisation name	23312052	Last name	Forename	M 07, 2014/15	Mon 01-Sep-2014	2.00				1.50			
18	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.



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

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	Organisation	Personal Number	Surname	Forename(s)	Pay Period	Date	P/T How	Sat. Enh	sun. Enb	right Enb	uns Enh	Hol.	Day	sat. OT	sun. OT	Night OT	uns. OT	Hol.	
4	918 Organisation Na	12345678	▼ Sumame	Forename	<u>▼</u> M 07: 2014/15	▼ Mon 01-Sen-2014	nuur	•	•	•	•	<u> </u>	01	•	•	•	<u>•</u>	01	
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7	918 Ornanication Na	123/5678	Sumama	Forename	M 07 2017/15	Wad 03. San. 2011	1.21												

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

1					N	IS Blood	and T	rans	splan	t									1
2						Enhanceme	nts &	Overt	ime										
3					From	01 September 2	014 To 3) Septe	ember 20)14									
4	Organisation	Personal Number	Surname 🗸	Forename(s)	Pay Period	Date 🗸	Excess P/T Hours	Sat. Enh	Sun. Enh	Night Enh	Uns Enh	Pub. Hol. Enh _y	Week Day OT	Sat. OT	Sun. OT	Night OT	Uns. OT	Pub. Hol. OT	
5	918 Organisation N	24492884	Surname	Forename	M 07, 2014/15	Tue 02-Sep-2014							4.25	4					
6	918 Organisation N	20933597	Surname	Forename	M 07, 2014/15	Wed 03-Sep-2014	0.63						0.00						
7	918 Organisation N	20933597	Surname	Forename	M 07, 2014/15	Thu 04-Sep-2014	1.21						6.75						
8	918 Organisation N	20933597	Surname	Forename	M 07, 2014/15	Fri 05-Sep-2014	0.80						7.25						
9	918 Organisation N	11225811	Surname	Forename	M 07, 2014/15	Mon 01-Sep-2014							7.50 8.00						
10	918 Organisation N	11225811	Surname	Forename	M 07, 2014/15	Wed 03-Sep-2014					2.00		8.15						
1	918 Organisation N	11225811	Surname	Forename	M 07, 2014/15	Fri 05-Sep-2014	0.25				1.00		8.50						
12	918 Organisation N	11225811	Surname	Forename	M 07, 2014/15	Mon 08-Sep-2014					0.50		8.78						
13	918 Organisation N	11225811	Surname	Forename	M 07, 2014/15	Wed 10-Sep-2014							9.50						
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18	918 Organisation N	23312052	Surname	Forename	M 07, 2014/15	Tue 02-Sep-2014	7.50						13.00 (Blanks)						
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20	918 Organisation N	23312052	Surname	Forename	M 07, 2014/15	Mon 08-Sep-2014					1.00								

*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.

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4	Organisation	Personal Number 12345678	Surname Surname	Forename(s) Forename	Pay Period	Date ▼ Sat 13-Sep-2014	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. C
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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.

	1					NHS B	lood and	Tra	nsp	lan	t									
	2					Enha	ncements	& Ov(ertim	e										
ĺ	3					From 01 Sep	tember 2014 T	o 30 Se	ptemb	er 20'	14									
	4	Organisation	Personal Number	Surname •	Forename(s)	Pay Period	Date 🗸	Excess P/T Hourv	Sat. Enh	Sun. Enh	Night Enh	Uns Enh	Pub. Hol. Enl -	Week Day OT v	Sat. OT	Sun. OT	Night OT	Uns. OT	Pub. Hol. OT ↓	
ľ	11	918 Organisation Na	12345678	Sumame	Forename	M 06, 2014/15	Mon 25-Aug-2014	0.25					1.00							
ľ	18	918 Organisation Na	12345678	Sumame	Forename	M 06, 2014/15	Mon 25-Aug-2014	1.50					1.50							
	28	918 Organisation Na	12345678	Sumame	Forename	M 06, 2014/15	Mon 25-Aug-2014						7.50							
	39	918 Organisation Na	12345678	Sumame	Forename	M 07, 2014/15	Mon 25-Aug-2014		5.00										5.00	
	5890	1																		

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.

1	NHS Blood and Transplant																		
2	2 Enhancements & Overtime																		
3	3 From 01 September 2014 To 30 September 2014																		
4	Organisation	Personal Number	Surname •	Forename(s) •	Pay Period	Date 🗸	Excess P/T Hour	Sat. Enh	Sun. Enh	Night Enb	Uns Enh	Pub. Hol. Enl∓	Week Day OT v	Sat. OT	Sun. OT	Night OT	Uns. OT	Pub. Hol. OT ↓	
10 918	3 Organisation Na	12345678	Surname	Forename	M 07, 2014/15	Wed 10-Sep-2014					2.00								
12 918	3 Organisation Na	12345678	Surname	Forename	M 07, 2014/15	Mon 15-Sep-2014					0.50								
14 918	3 Organisation Na	12345678	Sumame	Forename	M 07, 2014/13	Tue 02-Sep-2014					1.50								
17 918	3 Organisation Na	12345678	Sumame	Forename	M 07, 2014/15	Fri 05-Sep-2014	2.00				1.50		/						
20 918	3 Organisation Na	12345678	Sumame	Forename	M 07, 2014/15	Sun 07 Cop 2014					1.00								
21 918	3 Organisation Na	12345678	Sumame	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.

🔁 EASY :) My Preferences Change password Log out Guidance ⊡> Documentation ⊡> Help/Support
Home > Attendance > Reports > Emerg	ency Duties by date	Thursday, 2nd October 2014 14:13:07
 ▶ Self Service ▼ Management 	Report on daily emergency duty within the r	report date range. This report requires detailed timesheets and will find no data for those recorded as a period summary.
👻 👍 Time & Attendance	Authority/Trust:	NHS Blood and Transplant (918) 🔳
Absences	From:	Leave blank for no lover limit.
Absences Timesheets	To:	Leave blank for no upper limit.
Enhanced/Overtime	Breakgroup:	Organisation 💌
Emergency Duties Group By Date By Period Assignment By Date By Pariod Hours/Sessions	Organisations:	918 Department Name 918 Department Name 918 Department Name 918 Department Name 918 Department Name
Leave Requests	Output Single Worksheet:	Cutputs data to a single worksheet
	Simplified Worksheet:	Simple worksheet to aide manipulation in Excel Run Report



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

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4	Organisation	Personal Number	Surname	Forename(s)	Pay Period	From 01 S Date	eptemb Week Day O/Call	er 2014 Sat/Su n 0/Call	To 07 Pub. Hol. O/Call	Septer Week Day S/By	nber 20 Sat/Sun S/By	14 Pub. Hol. S/By	Week Day/Sa t Wk Dn	Sun/Pu b. Hol. Wk Dn	Week Day Wk Dn	Sat Wk Dn	Sun Wk Dn	Pub. Hol. Wk Dn	Week Day Other	S 01
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4 5 6 7 8 9	Organisation 918 Organisation 918 Organisation 918 Organisation 918 Organisation 918 Organisation	Personal Number 12345678 12345678 12345678 12345678 12345678 12345678	Surname Surname Surname Surname Surname Surname	Forename(s) Forename Forename Forename Forename Forename	Pay Period M 07, 2014/15 M 07, 2014/15 M 07, 2014/15 M 07, 2014/15 M 07, 2014/15	From 01 S Date Wed 03 Sep-2014 Thu 04-Sep-2014 Fri 05-Sep-2014 Sat 06-Sep-2014 Sun 07-Sep-2014	eptemb Week Day O/Call	er 2014 Sat/Su n O/Call	To 07 Pub. Hol. O/Call	Septer Week Day S/By 16.00 16.00	nber 20 Sat/Sun S/By 24.00 24.00	14 Pub. Hol. S/By	Week Day/Sa t Wk Dn	Sun/Pu b. Hol. Wk Dn	Week Day Wk Dn 10.25	Sat Wk Dn	Sun Wk Dn	Pub. Hol. Wk Dn	Week Day Other	S 01

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

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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.

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1	NHS Blood and Transplant																			
2	2 From 01 September 2014 To 07 September 2014												_							
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4	Organisation	Personal Number	Surname •	Forename(s) •	Pay Period	Date 🗸	Week Day O/Ca ¹¹	Sat/Su n 0/Ca ^{II}	Pub. Hol. 0/Ca ⁿ	Week Day S/By	Sat/Sun S/By	Pub. Hol. S/By	Week Day/Sa t Wk Dn ▼	Sun/Pu b. Hol. Wk D ⁿ	Week Day Wk Dn	Sat Wk Dn	Sun Wk Dr	Pub. Hol. Wk Dı v	Week Day Othr	S 01
5	918 Organisation	12345678	Surname	Forename	M 07, 2014/15	Wed 03-Sep-2014				16.00					10.25					
11	318 Organisation	12345678	Sumame	Forename	M 07, 2014/15	Tue 02-Sep-2014	16.00								10.00					-
12	918 Organisation	12345678	Surname	Forename	M07,2014/15	Wed 03-Sep-2014	16.00								5.00					
13	318 Organisation	12345678	Sumame	Forename	M 07, 2014/15	Tue 02-Sep-2014									10.00					
16	918 Organisation	12345678	Sumame	Forename	M 07, 2014/15	Wed 03 Sep. 2014				16.00					6.00			\square		

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 / callouts 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 / callouts 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.