MSS3: Private Reports

Reporting features in Manager Self Service 3 (MSS3) help supervisors track and analyze payroll and labor information, such as employee schedules, benefits, time cards or contact information. A private report is accessed from the Private Reports menu item and is unique to your account. The reports that you create in this menu item cannot be accessed by other users, but you can email the report to them.

Private reports may not be available for all browser profiles. Typically, the supervisor browser profile does not have private reports.

Add a Report

To add a private report:

- 1. Click the Private Reports menu item.
- 2. In the *Private Reports* page, the reports list will be empty and the report groups absent until you add a report.
- 3. Click the Add button.

Manager Day	\bigcirc	Private Reports	
Find: Search Employe	е	No Selections Available Adv	d
Process Payroll	\oplus		
Daily Operations	\oplus		
Scheduling	\oplus		
Long Term Care Reports	\oplus		
Reports and Summaries	Θ		
Shared Reports			
Personal Information			
Summary Sheet - Time	Card		
Incidents 4.00 - 5.99			
Incidents 10.00 +			
Private Reports			

4. In the *Add a New Report* window, type a title for the report and a description of the report in the *Hint* field.

Properties				
Report Title:	Benefit Activity for My Employees			
Hint:	Benefit activity for my employees	Benefit activity for my employees		
Report Group:	Benefits			
Base:	Employee List ~			
	Employee List			
	Pay Class Assignment			
	Employee Exceptions k Ca	nce		
	Employee Exceptions by Day	nce		
	Employee Schedules by			
	Workgroup			
	Employee Work History Grid			
	Worked Hours Calendar			
	Employment History Detail			
	Employee Benefit Activity			
	Simple Hourly Pay			
	Designation Summaries			
	Hours each employee			

5. Type the name of the report group you want the report to be added to. Report groups are a collection of reports based on a related time and attendance topic, such as scheduling and benefits.

When adding the report group name of an existing report group, type the name exactly as it appears in the list (including matching upper and lower case letters). If the name does not match, a new group will be created.

6. Select the basic structure of the report from the Base drop-down list.

Report structures in the Base drop-down list are predefined in the system.

7. Click **Ok** when you have finished updating the fields.

The new report and report group is added to the *Private Reports* page.



8. Click the private report you created to view the report properties in *Private Reports* page.

Private Reports			
Benefits ~			
Benefit Activities for My Employees	Benefit Activities for My Employees		
Benefit activities for my employees	Operations \lor Run Report		
	Report Label	Period	Employees
	Benefit Activities for My Employees Benefit activities for my employees	Last 12 Months (FMLA)	All Accessible Employees
	Fields	Grouping	Filter
	Full Name (Last, First), ID Number, Badge No., Pay Class Name	Each Employee. New page on each new group.	Active Employees
	Destination	Auto Run Schedule	Prior Executions
	Screen	Not Scheduled to Run	No Saved Copies

Report Properties

Each report has its own set of properties that define the content and format of the report. The report properties relate to the type of data the report contains.

Report Label	Period	Employees		
Benefit Activities for My Employees Benefit activities for my employees	Last 12 Months (FMLA)	All Accessible Employees		
Fields	Grouping	Filter		
Full Name (Last, First), ID Number, Badge No., Pay Class Name	Each Employee. New page on each new group.	Active Employees		
Destination	Auto Run Schedule	Prior Executions		
Screen	Not Scheduled to Run	No Saved Copies		

To change a report's structure:

1. Click the blue folder icon and select a property in the drop-down list.

Benefit Activities for My Employees Operations ~ Run Report				
Report Label	6 ~	Period	Employees	
Benefit Activities for My Employees Benefit activities for my employees		Last 12 Months (FMLA)	All Accessible Employees	Select Employees

2. In the property window, select the changes you would like to make. For example, to change the employees included in the report, select the Employees folder drop-down list and click the Include button in the employee selection panel.

	Employees
	My Employees V Search 🗳
Employees	324 Employees 2 Selected
All Accessible Employees	Glenwood Skilled Nursing 2FL RN
Filter	ுதைு Day DNN 1 ★க்கத்த
Active Employees	Include Exclude
Prior Executions	Savier Aston Glenwood Skilled Nursing 2FL RN add employee ★★★★★ Day DNN 1
No Saved Copies	Include Exclude

3. Your selections will appear beneath the category in the report page.

Benefit Activities for My Employees			
Operations \lor Run Report			
		Employees 🛅 🗸	Employees
Report Label	Period	Amherst, Luke E Aston, Xavier U	added to
Benefit Activities for My Employees Benefit activities for my employees	Last 12 Months (FMLA)	Barwick, Joshua I Beckley, Nathan S Belden, Katelyn S Bingham, Amber F	report

Copying a Report

Reports can be copied, modified and saved to any exisiting report category or to a new category.

To copy a report:

- 1. Click the *Operations* drop-down list in the report page of the report you are copying.
- 2. Select Copy Report (Make Another).

Time Card Report			
Operations \sim	Run Report		
Copy Report (Ma	ke Another)		
Remove Report	(Permanently)		Workgroups
Time Card Report Time Card Report,	one employee per p	age.	Evergreen-Skilled Nursing-All-All-A
Fields			Grouping

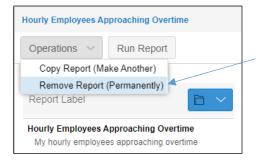
3. Add a title and description to the report in the *Copy an Existing Report* window.

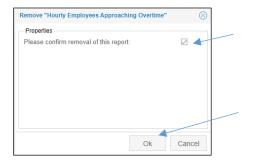
Copy an Existing Rep	ort 🤅
Properties	
Report Title:	Skilled Nursing Time Card Report
Hint:	Skilled Nursing only Time Card Report
Report Group:	Common Reports
	Ok Cancel

- 4. Type the name of the report group you want the report to be added to. If this is an existing report group, be sure to match the name exactly to prevent creating a new group.
- 5. Click **Ok** to save your new report.

Remove a Report

To remove a report from a report group, click the *Operations* drop-down list in the report page and select **Remove Report (Permanently)**. Enable the **Please confirm removal of this report** check box and click **OK**.





Running a Report

Reports can be run by clicking the **Run Report** button or they can be scheduled to run automatically in the report properties by scheduling when the report will run and the users who will receive the report.

To run a report:

1. Click the **Run Report** button in the report page.

Benefit Activities for My Employees	
Operations ~ Run Report	
Report Label	Period
Benefit Activities for My Employees Benefit activities for my employees	Last 12 Months (FMLA)

2. Select the report format (Microsoft Excel or PDF) and the destination for displaying the report (screen or mail).

	Build Report		\otimes	
	Properties			Excel or PDF
	Format:	Adobe Reader (PDF)		
~	Destination:	Email ~	-	Email or screen
	Recipients:	ManagerNight@company.com; ManagerWknd@company.com		Separate email addresses with semicolon
		Ok Cance	el	

3. If emailing the report, enter the email address in the *Recipients* field.

When entering more than one email address in the Recipients field, separate the addresses with a semicolon.

- 4. Click **Ok** to run the report.
- 5. Click **Ok** in the *Preview Report* window.

Preview Report		\otimes
Properties		
Report Details:	"Benefit Activities for My Employees" Created On Aug-9 2018 2:10pm by MGR DAY	
Format:	Adobe Reader (PDF)	
Destination:	Screen ~	
	Ok Canc	el

6. Click **Ok** in the window indicating that your file will download momentarily.



If you selected Screen as the destination, the report becomes available at the bottom of the browser window. If you selected Email, the report will be emailed to the entered recipients

Facility Hours Reporting	\oplus	
Administration	\oplus	
Leave Request	\oplus	Processes
Benefit Activi	ties f	pdf ^

To schedule the report to run automatically:

1. Click the blue folder icon for the Auto Run Schedule report property.

Not Scheduled to Run	Add New Schedule
Auto Run Schedule	Prior Executions

2. In the *Adjust Report Schedule* window, set the day and time the report will run.

roperties		Recipients:	Manager Night@company.com;		
Description:	Benefit Activities for My Employee		ManagerWknd@company.com		
Attachment Type:	Adobe Reader (PDF)				
Time of Day:	8:20a	Subject Line:	Benefit Activities for My Employee		
Sun:		Content Message:			
Mon:					
Tue:					
Wed:			N		
Thu:			\searrow		
Fri:					
Sat:					

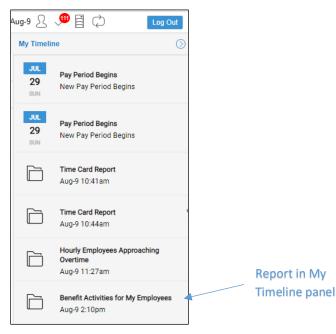
3. Select the format of the report.

Properties				
Description:	Time Card Report			
Attachment Type:	Adobe Reader (PDF)			
Time of Day:	Adobe Reader (PDF)			
Sun:	Employee List CSV (Unformatted)			
Mon:	Employee List XMLSS for Excel			
Tue:	Full Detail CSV (Unformatted)			
Wed:	Full Detail XMLSS for Excel			

- 4. Type the email address of the recipients, separating multiple addresses with a semicolon.
- 5. Define the appearance of the report with the description, email subject line and add a message if needed.

Regenerate a Report

A previously run private report can be regenerated from My Timeline quick access button. The My Timeline panel contains a sequential list of user activities and system milestones, including recently generated reports. To run a report from My Timeline, click the report.



Select the format and viewing options, screen or email, in the *Preview Report* window. Do not enable the Remove Timeline Reminder check box, which is used to delete the report from My Timeline.

Preview Report		\otimes	
Properties			
Report Details:	"Benefit Activities for My Emplo Created On Aug-9 2018 2:10pr MGR DAY		
Format:	Adobe Reader (PDF)	~	
Destination:	Screen	~	
Recipients:			
Remove Timeline Remir	der:		Removes the report from My Timeline
	Ok	Cancel	

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