

# MSS3: Private Reports

Job Aid

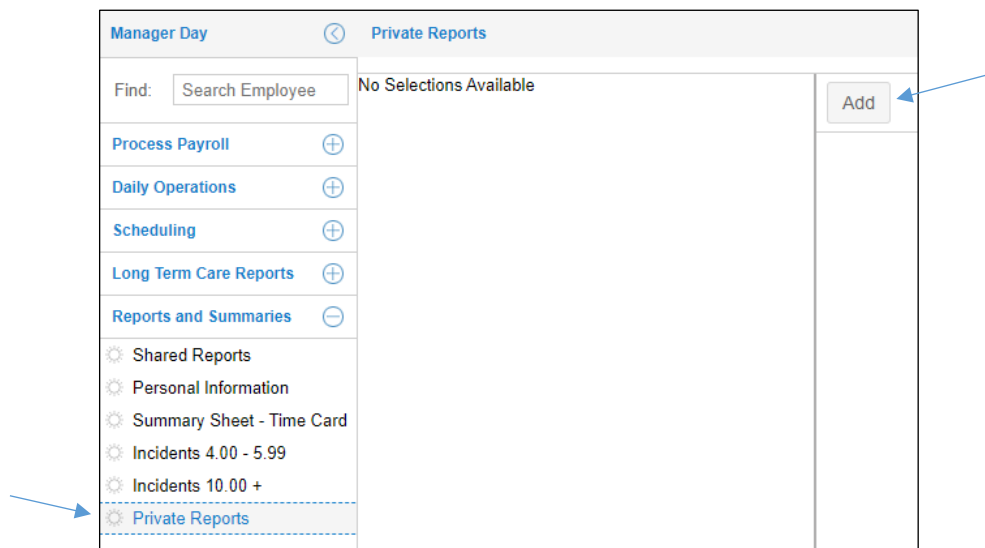
Reporting features in Manager Self Service 3 (MSS3) help supervisors track and analyze payroll and labor information, such as employee schedules, benefits, time cards or contact information. A private report is accessed from the Private Reports menu item and is unique to your account. The reports that 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.

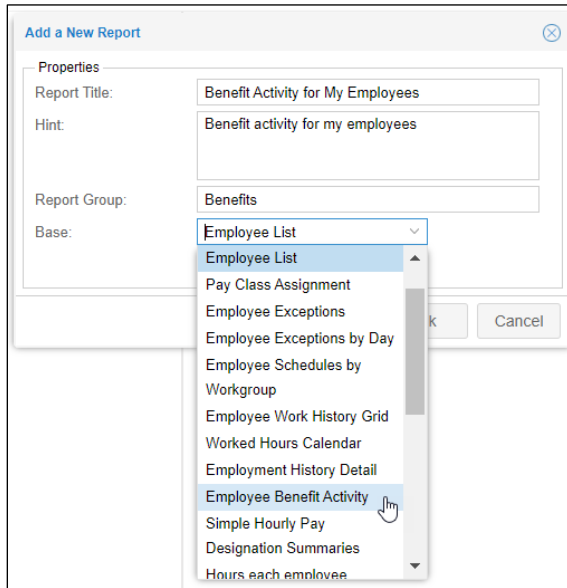
## Add a Report

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.



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



- 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.

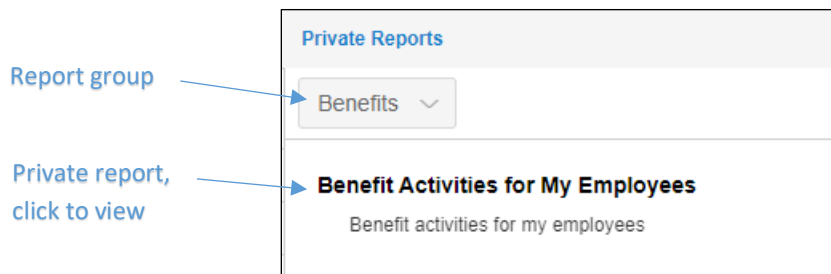
When adding the report group name of an existing report group, type the name exactly as it appears in the list (including matching upper and lower case letters). If the name does not match, a new group will be created.

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

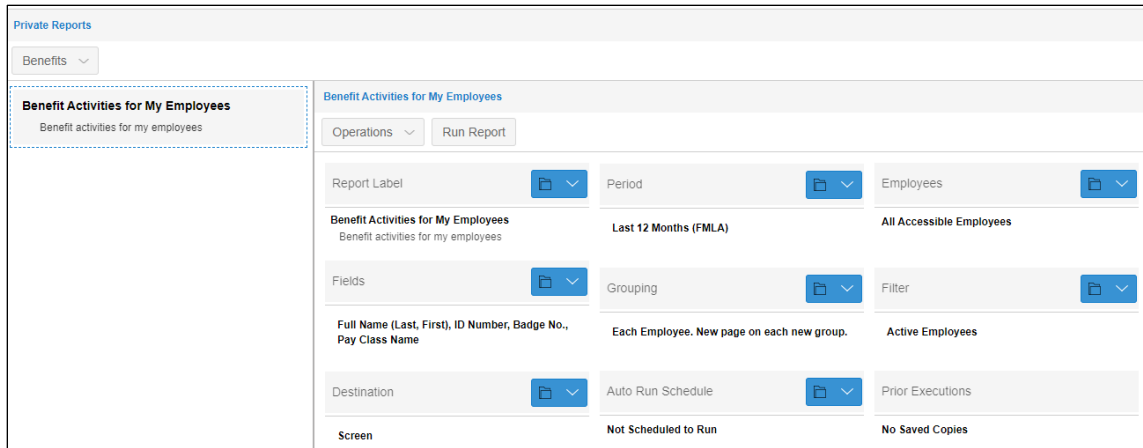
Report structures in the Base drop-down list are predefined in the system.

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

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

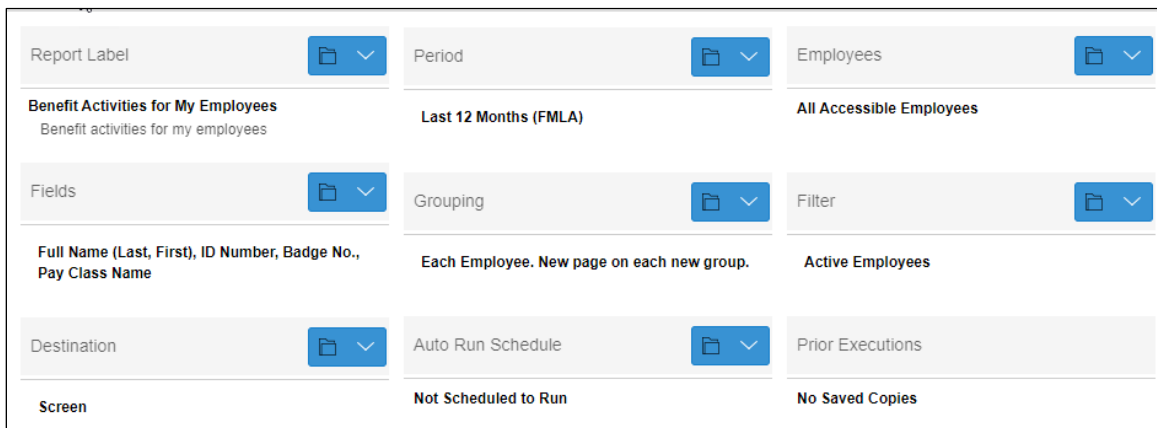


- Click the private report you created to view the report properties in *Private Reports* page.



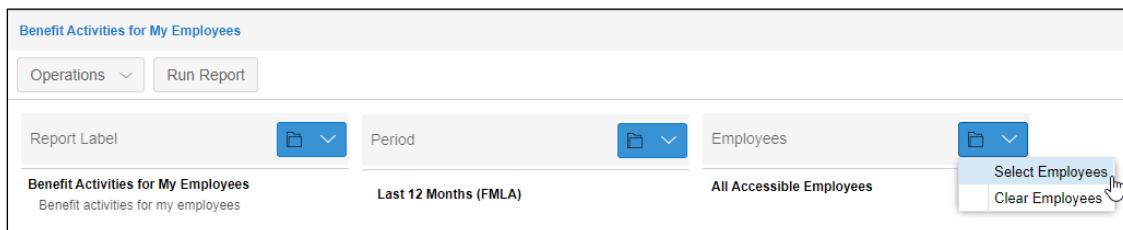
## Report Properties

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.

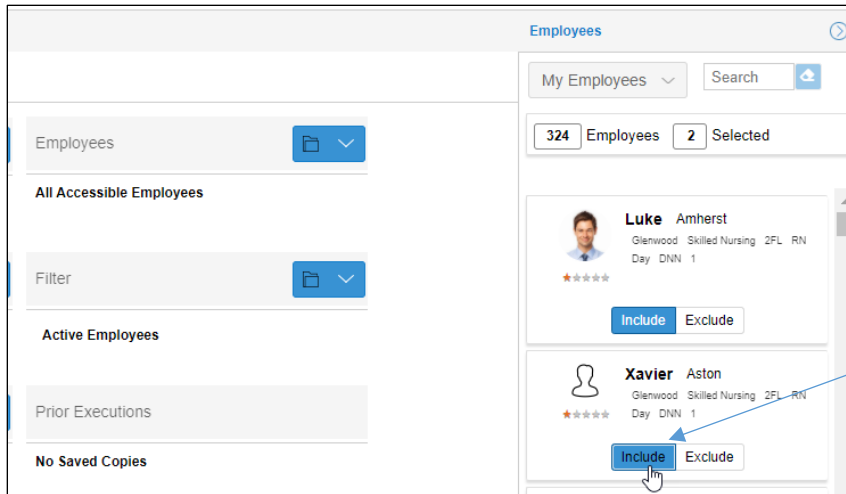


To change a report's structure:

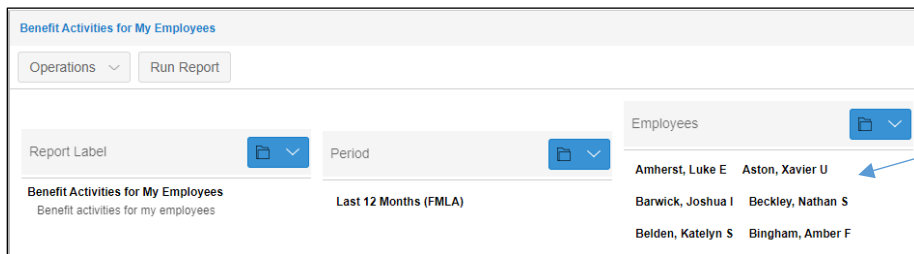
1. Click the blue folder icon and select a property in the drop-down list.



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.



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

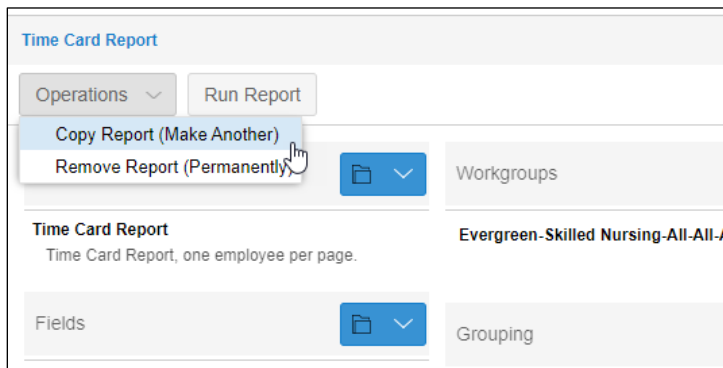


## Copying a Report

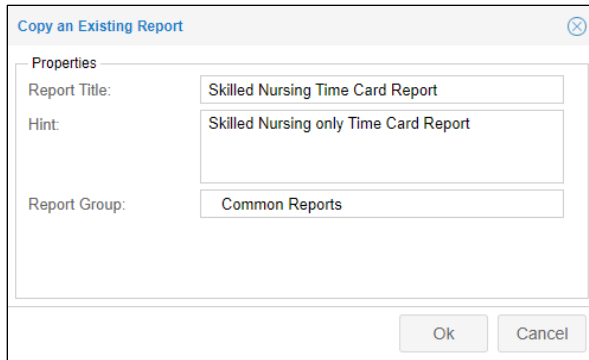
Reports can be copied, modified and saved to any existing report category or to a new category.

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)**.



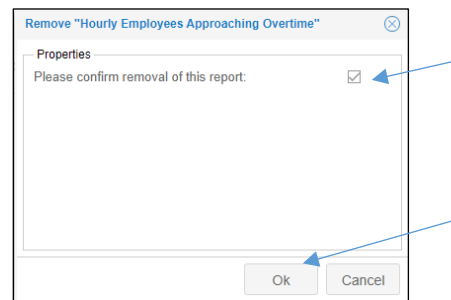
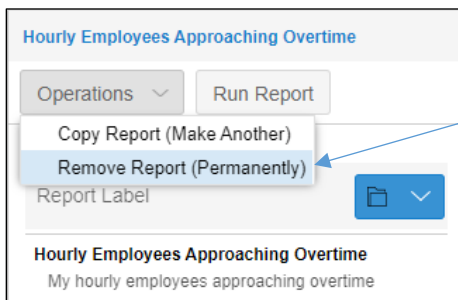
3. Add a title and description to the report in the *Copy an Existing Report* window.



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**.

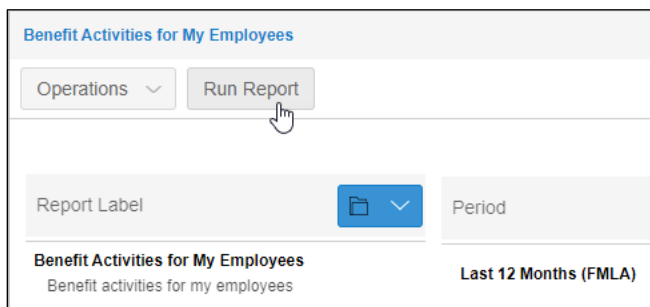


### Running a Report

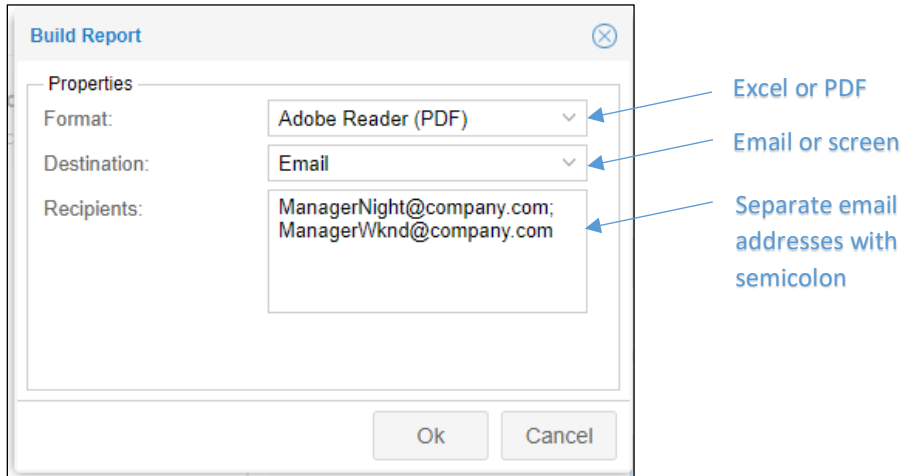
Reports can be run by clicking the **Run Report** button or they can be scheduled to run automatically in the report properties by scheduling when the report will run and the users who will receive the report.

To run a report:

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



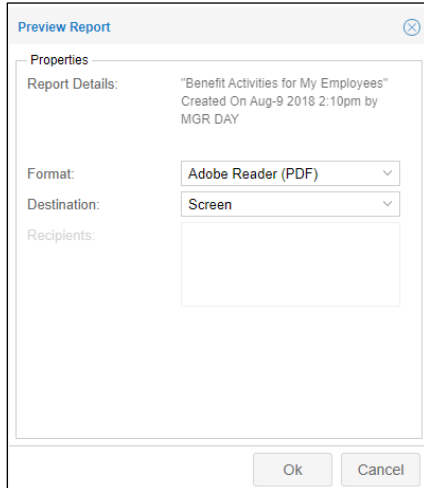
2. Select the report format (Microsoft Excel or PDF) and the destination for displaying the report (screen or mail).



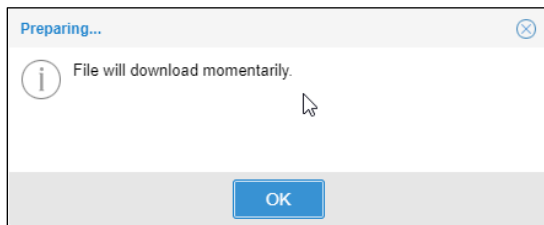
3. If emailing the report, enter the email address in the *Recipients* field.

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

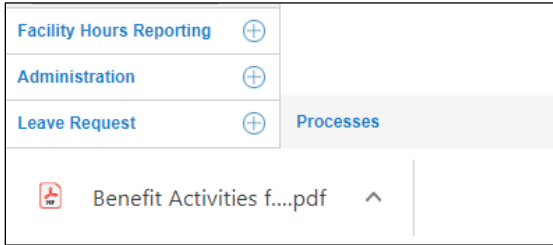
4. Click **Ok** to run the report.
5. Click **Ok** in the *Preview Report* window.



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

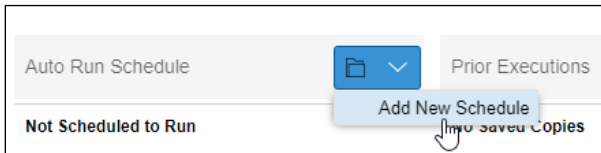


If you selected Screen as the destination, the report becomes available at the bottom of the browser window. If you selected Email, the report will be emailed to the entered recipients

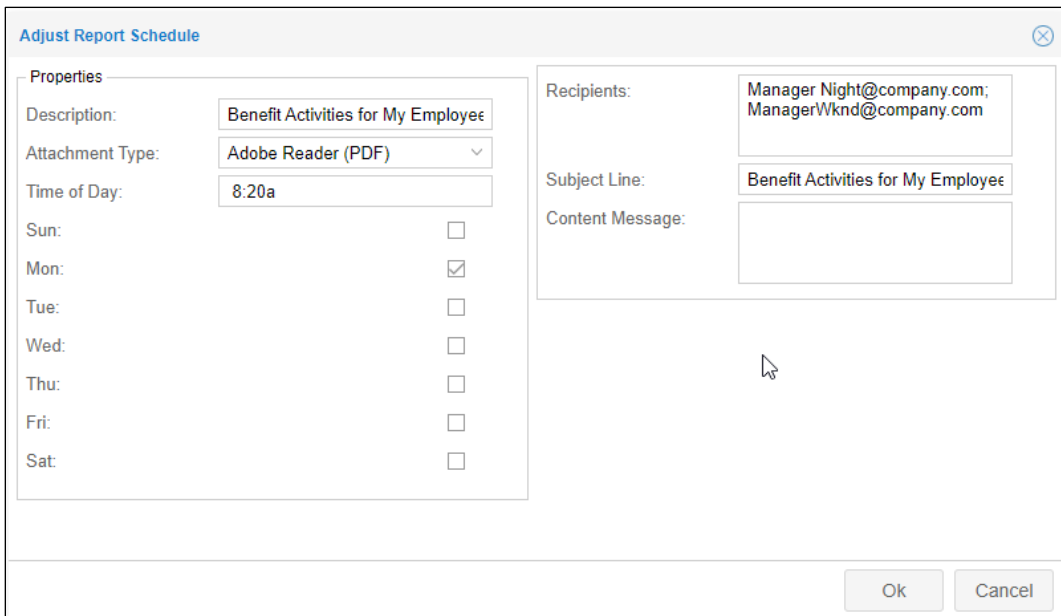


To schedule the report to run automatically:

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



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



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.

The screenshot shows the 'My Timeline' interface. At the top, there is a navigation bar with the date 'Aug-9', a user profile icon, a notification bell with '11', a refresh icon, and a 'Log Out' button. Below this is the 'My Timeline' header with a search icon. The main content area lists several events:
 

- JUL 29 SUN** Pay Period Begins (New Pay Period Begins)
- JUL 29 SUN** Pay Period Begins (New Pay Period Begins)
- Time Card Report (Aug-9 10:41 am)
- Time Card Report (Aug-9 10:44 am)
- Hourly Employees Approaching Overtime (Aug-9 11:27 am)
- Benefit Activities for My Employees (Aug-9 2:10 pm)

 A blue arrow points from the text 'Report in My Timeline panel' to the 'Benefit Activities for My Employees' entry.

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** [X]

**Properties**

Report Details: "Benefit Activities for My Employees"  
Created On Aug-9 2018 2:10pm by  
MGR DAY

Format: Adobe Reader (PDF) [v]

Destination: Screen [v]

Recipients: [Empty List Box]

Remove Timeline Reminder:

Ok Cancel

Removes the report from My Timeline

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