

MSS3: Summary Sheets

Job Aid

Summary sheets are interactive pages that present cumulative departmental or company information based on employee data, such as total hours worked, time cards, employee exceptions and department dollars per day. Information in a summary sheet can be sorted and filtered for a specific time period. Drill down options can also be used to access additional details in individual employee records. Summary sheets are accessed through menu items and can be viewed on screen or printed.

To view a summary sheet, click the summary sheet menu item. In the example below, the Summary Sheet – Time Card menu item was selected.

The summary sheets available to you and the how the summary sheet menu items are labeled and located is determined by your system setup.

Summary sheet menu item

Time Cards	Period: Current Period						Excel	Print Preview	
Manager Day	Find: Search Employee								
Process Payroll	Time Cards								
Daily Operations	Totals	7290:00	41:45	3213:30	12:15	2000:15	9:45		
Scheduling	Employee	Reg	OT	R2	EOT	R3	NOT		
Long Term Care Reports	Amherst, Luke E	73:20		5:30					
Reports and Summaries	Aston, Xavier U	12:00							
Shared Reports	Barwick, Joshua I	54:30							
Personal Information	Beckley, Nathan S	45:00							
Summary Sheet - Time Card	Belden, Katelyn S	48:30	3:30	8:00					
Incidents 4.00 - 5.99	Bingham, Amber F			30:30					
Incidents 10.00 +	Birney, Olivia G	48:45	2:30						
	Boughton, Evan Z					49:15			
	Brienne, David Y	37:30							

Select a timeframe for the data to be presented by selecting one of the options presented in Period drop-down list.

Period:	Current Period	Excel	Print Preview
Time Cards	Custom		
Totals	Previous Period		
Employee	Current Period	12:15	2000:15
Amherst, Luke E	Next Period	EOT	R3
Aston, Xavier U	Yesterday		
Barwick, Joshua I	Today		
Beckley, Nathan S	Tomorrow		
Belden, Katelyn S	3 Weeks Ago		
Bingham, Amber F	Week Before Last		
Birney, Olivia G	Previous Week		
Boughton, Evan Z	Current Week		
Brienne, David Y	Next Week		
	Previous Fortnight		49:15
			37:30

Columns of the summary sheet can be sorted by clicking the column header or by clicking the header drop-down list and selecting either **Sort Ascending** or **Sort Descending**.

Time Cards				
Totals	7290:00	41:45	3213:30	12:15
Employee	Reg	OT	R2	EOT
Amherst, Luke E	73:2	↑ Sort Ascending		5:30
Aston, Xavier U	12:0	↓ Sort Descending		
Barwick, Joshua I	54:3	Columns		
Beckley, Nathan S	45:00			
Belden, Katelyn S	48:30	3:30	8:00	

The Columns option lets you select which columns will be displayed in the summary sheet. Disable the check box for the information you want to remove from the summary sheet view.

Time Cards							
Totals	7290:00	41:45	3213:30	12:15	2000:15	9:45	
Employee	Reg	OT	EOT	NOT	HyW	SIC	
Amherst, Luke E	73:2	↑ Sort Ascending					
Aston, Xavier U	12:0	↓ Sort Descending					
Barwick, Joshua I	54:3	Columns					
Beckley, Nathan S	45:00						
Belden, Katelyn S	48:30	3:30					
Bingham, Amber F							
Birney, Olivia G	48:45	2:30					
Boughton, Evan Z							
Brienne, David Y	37:30						
Burnham, Mariah T	37:30						
Caw, Nathaniel Z							
Chadwick, Matthew C	52:15						
Cleaver, Anthony U	65:25						
Collamore, Hannah Q							
Dalton, Brooke W	46:00						

The view that you create by sorting and hiding columns can only be presented on the screen. When you leave the summary sheet page it will return to the default view. Only the default view can be printed or exported.

Summary sheets will provide additional summary information when you click in a row of the sheet. For example, clicking an employee row in the Time Card summary sheet will let you drill down to the employee’s Time Card.

Time Cards					
Totals	7290:00	41:45	3213:30	12:15	2000:15
Employee	Reg	OT	EOT	NOT	HyW
Jessup, Samantha S					
Johnston, Colin H					
Johnston, Madeleine L	4:30				
Johnston, Maria O	57:00	3:00			
Jones, Sarah A	58:00				
Jones, Vanessa V	45:45				
Keith, Luke G			1:15		

Printing and Exporting Data

Print a summary sheet by clicking the **Print Preview** button in the navigation bar of the summary sheet. A PDF of the summary sheet’s default view will download.

Period:	Current Period	Excel	Print Preview			
Time Cards						
Totals	7290:00	41:45	3213:30	12:15	2000:15	9:45
Employee	Reg	OT	R2	EOT	R3	NOT
Amherst, Luke E						
Aston, Xavier U	12:00					
Barwick, Joshua I	54:30					
Beckley, Nathan S	45:00					

Create PDF for printing

Export to Excel spreadsheet

Click the Excel button in the navigation bar to export a summary sheet to a Microsoft Excel spreadsheet. The default view of the summary sheet will be exported.

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