

Section 8: Secure Area Reports

There are several reports which are automatically uploaded to the secure area (Perspective Lite) on SchoolsNet as detailed below.

Report	Frequency	Day available
Inventory	Monthly	1st
Sickness report	Monthly	17th
Other Absences report	Monthly	17th
Val Basis report for Governors * (details of additional hours paid at a different rate of pay)	Monthly (where applicable)	17 th
Accrued leave report *	Monthly (where applicable)	27th
SAP and OrderPoint users	Quarterly (March, June, September, December)	30th
School workforce missing qualifications	Quarterly (March, June, September, December)	30th

*** These reports will only be available where the criteria applies (see section 8.3 and 8.4 below)**

8.1 Inventory report (School DfE Number_SSHREstabInventory<Date>)

A full report of all items recorded on your SAP inventory is produced monthly and published on Perspective Lite.

It is also possible to produce adhoc inventory reports directly from SAP (e.g. to produce a list of items to be written off by Governors). Details of how to run adhoc reports is contained in the Establishment Inventory guidance on SchoolsNet. Adhoc reports must not be used to replace the published report as it is very resource hungry and may slow the system down for other users.

8.2 Absence reports

As well as the facility to produce a monthly summary of absences directly from SAP (PT91 monthly absence report - Section 7 SAP HR & Payroll - Guidance for Inputting and Reporting) there are also two reports published on Perspective Lite to assist you with absence monitoring.

The reports are as follows:

- **Sickness report** – this report covers any period of sickness or industrial injury within the 12 month period (**School DfE Number_SSHRSicknessAbsence <Date>**).

- **Other Absence report** – this report details all absence types excluding sickness e.g. Medical appointments, Special leave, Time off for dependants within the 12 month period. **(School DfE Number_SSHROtherAbsence <Date>).**

These reports include working days lost up until the last day of the previous month for a rolling year.

Report Uploaded to SchoolsNet	Covers Period	
	From	To
17 th January 2018	1 st January 2017	31 st December 2017
17 th February 2018	1 st February 2017	31 st January 2018
17 th March 2018	1 st March 2017	28 th February 2018
17 th April 2018	1 st April 2017	31 st March 2018
17 th May 2018	1 st May 2017	30 th April 2018

Example - Sickness Absence

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
DfE School Number	NI Number	Employee no	First Name	Last Name	Position no	Position Name	Employee Subgroup	Cap.Utilization Lvl	Weeks Per Year	Absence type	Start Date	End Date	Illness Description Code	Description of illness	Payroll Days

Example - Other Absence

A	B	C	D	E	F	G	H	I	J	K	L	M	N
DfE School Number	NI Number	Employee no	First Name	Last Name	Position no	Position Name	Employee Subgroup	Cap.Utilization Lvl	Weeks Per Year	Absence type	Start Date	End Date	No of Days Absent

8.3 Val Basis report (School DfE Number_SSHRValBasis<Date>)

This monthly report details any employees who have been paid additional hours at a different hourly rate of pay to their normal contracted hourly rate. Where this is the case it is an Audit requirement that this report must be presented at the next Governors meeting.

Please note that this report will only be generated where the above circumstances apply.

8.4 Accrued Leave (School DfE Number_SSHRAccruedLeave <Date>).

This monthly report details the balance of accrued leave for Single Status 52 week relief employees. This is a cumulative total and the member of staff can request payment for these hours as and when required. Please see SAP HR and Payroll Appendices for further information.

Please note if you do not have any 52 week relief employees, this report will not be generated.

School Number	Personnel number	Title	First Name	Surname	Position number	Position name	Weeks Per Year	Wage Type	Hours
---------------	------------------	-------	------------	---------	-----------------	---------------	----------------	-----------	-------

8.5 SAP and OrderPoint users (School DfE Number_SSHRSchoolRoles <Date>)

A report showing your current SAP, OrderPoint and VIM users is published quarterly.

It is important to check that the users listed in this report do still require SAP / OrderPoint system access, to avoid any unnecessary future licence charges. If there are any users on the list who are no longer at your school or no longer require system access, please submit a Delete SAP user form to remove their access to the systems. The Delete user form can be found in the SAP for Schools section ([SAP and Master Data forms](#)) on SchoolsNet.

8.6 School Workforce missing qualifications (School DfE Number_IRASSWFCensus <Date>)

This quarterly report will detail any missing qualifications for Teaching Assistants and Teachers.

Please see **Section 6 School Workforce** - SAP HR and Payroll guidance for further information including details of how to update these records on SAP.

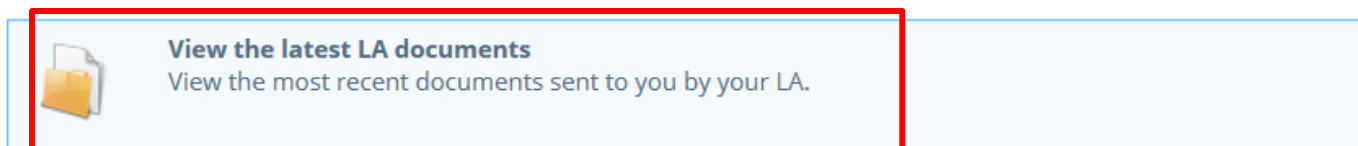
Example - SWF Missing Qualifications

School Number	Employee	First Name	Last Name	Position Name	Leaving Date
---------------	----------	------------	-----------	---------------	--------------

8.7 How to locate the reports on the Secure Area of SchoolsNet (Perspective Lite)

Please note that access to Perspective Lite is restricted to a limited number of users per School with access requests managed by the School Training and Support Team who can be contacted on 01629 536789 or by e-mail cayaweb@derbyshire.gov.uk

Having logged into Perspective Lite click on 'View the latest LA Documents'.



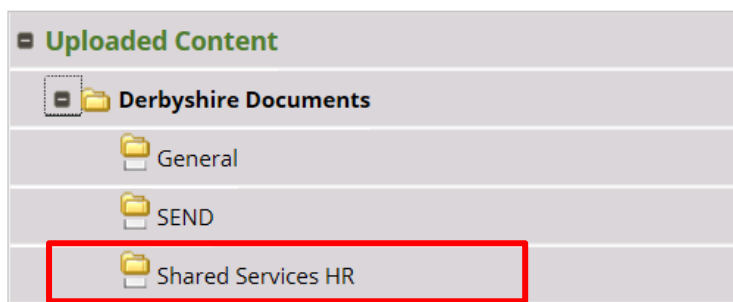
Click on 'Documents > Document Pool' on the menu bar



Any of the reports generated from SAP relating to your school will appear in the Shared Services HR folder of the Derbyshire Documents.

These folders will only be visible in your 'Document Pool' if you have at least one document within them. Folders are highlighted to indicate if there is new (unopened) content.

All documents uploaded to the secure area on Perspective Lite will only be made available for 90 days.



It is advisable that you download any files sent to you via the secure portal on to your school's network. This will ensure copies of documents containing confidential information are not held on a third party system for excessive periods of time.

8.8 How to save the reports as a CSV file

- Select the '**CSV file**' you wish to save e.g. '**830XXXX_SSHRSicknessAbsence31 012018**' for all sickness.
- Click '**File**' in the top left hand corner of the screen.
- Click '**Save as**'.
- Choose where you would like to save the data which must be on a **secure network drive on your PC**
- Give your file a name (e.g. Sickness absence Jan 2018)

- Click '**Save**' at the bottom left hand corner of your screen.

Your report has now been saved as a 'CSV file'.

8.9 To convert a CSV file to an Excel spreadsheet using 2010 version of Excel

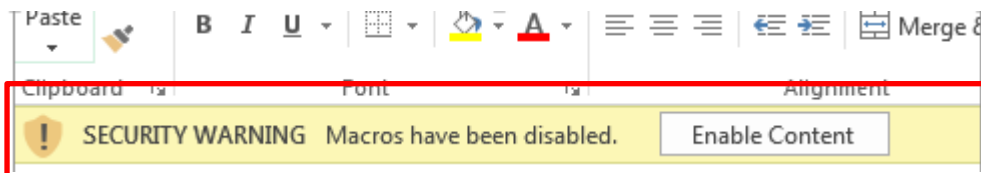
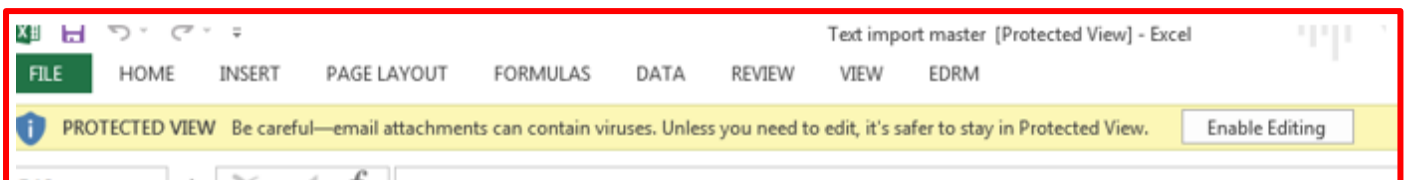
If you want to manipulate the data, or sort the data into a format that suits your schools requirements you will need to convert the CSV file to Excel.

The easiest way to convert your CSV file to an excel spreadsheet is to use the text import master spreadsheet. A copy of this master spreadsheet is available from the Core Business Systems Support team by e-mailing schools.sap@derbyshire.gov.uk

When you receive a copy of the text import master spreadsheet from the Core Business Systems Support team save this to a secure network drive so that this can be used each time you want to convert a CSV file to Excel

To convert a CSV file to an Excel spreadsheet;

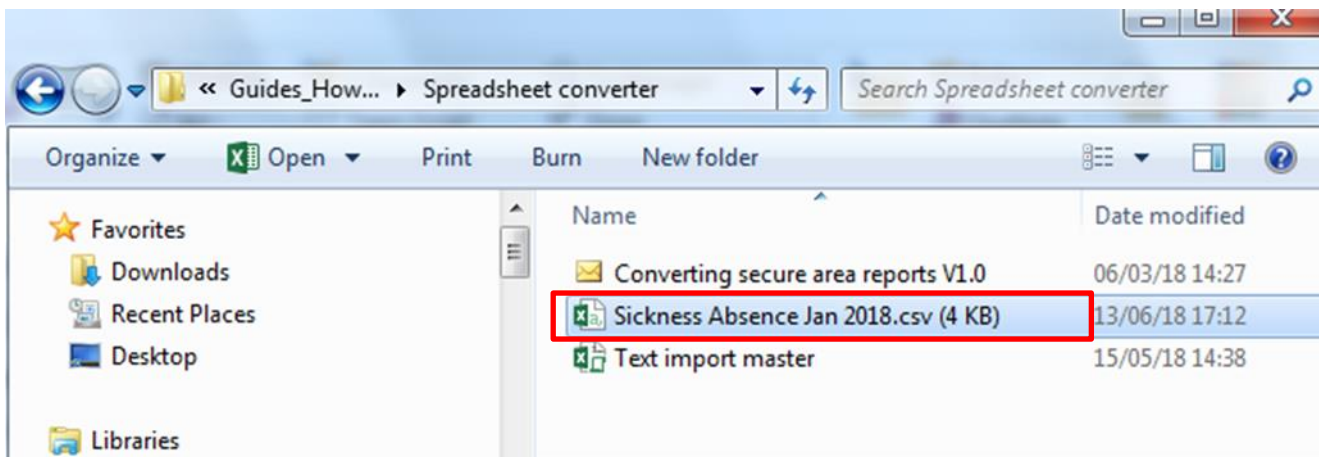
- Open the text import master spreadsheet
- Click on Enable Editing and or click on Enable Content until the yellow bar disappears



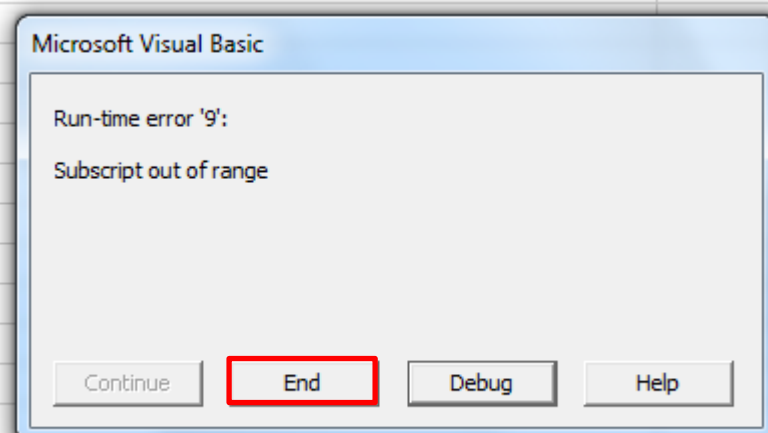
- Click on the **'Click here to Import a CSV file'**



- Search the file structure to find the CSV file that you have saved earlier on a secure network drive on your PC (as section 8.8 above)
- Double click on the report



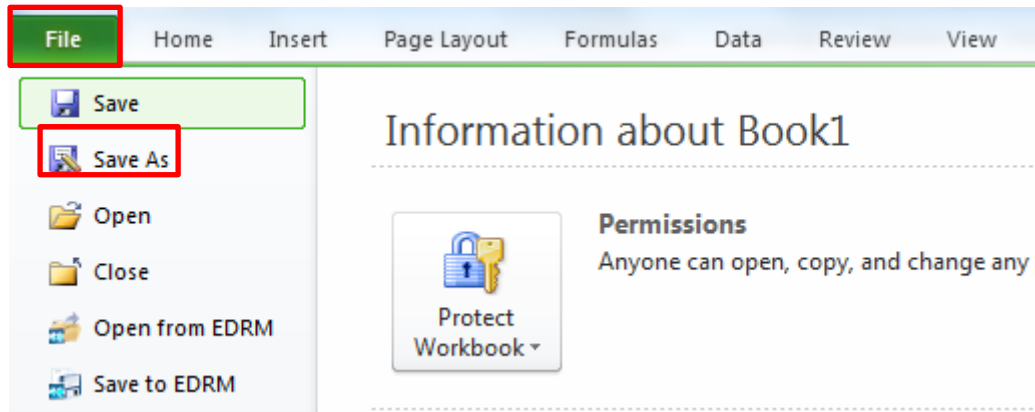
- The report will now appear in the Excel spreadsheet format
- **If you receive a runtime error message then click on End**



- Your data will now have been converted to an Excel spreadsheet

To save this data:

- Click '**File**' at the top left hand corner of your screen.
- Click '**Save As**'.



- Choose where you would like to save the data.
- Give your file a name.
- Ensure that the '**Save as Type**' Field reflects Excel e.g. **Excel Workbook**. If it does not, please select it from the drop down list.
- Save the file as 'password protected'. Click on '**Tools**' at the bottom right of the screen.
- Click on '**General Options**' to select.
- Enter a password to open and a password to modify.
- Click '**Save**' at the bottom right hand corner of your screen.

Your report has now been saved as an Excel spreadsheet.

Once you have converted the CSV file to an Excel file and saved it, you can manipulate this information to be displayed as you require.

You can sort the data into a format that suits your schools requirements.

The CSV file that you downloaded from Perspective Lite should now be deleted.

8.9.1 How to sort the data

The instructions shown are using Microsoft Office 2010. If you are using another version, please call the Core Business Systems Support Team.

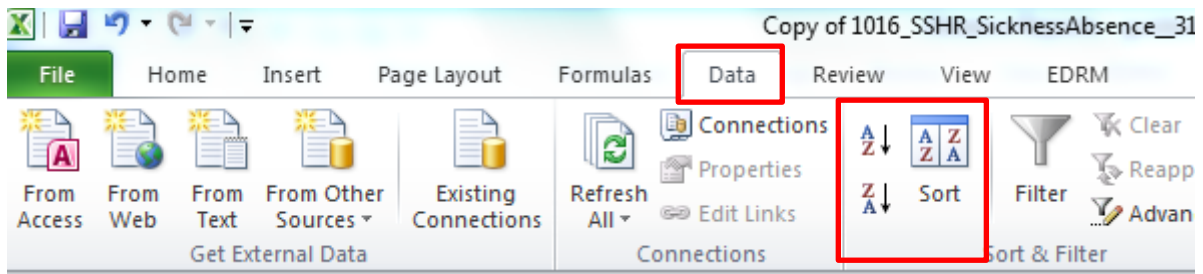
TIP: Ensure that all data is selected before sorting if not data may be sorted incorrectly

- Highlight the whole of the data by clicking in the top left hand corner of the spreadsheet.

	A	B	C	D	E	F	G	H	I
1	Cost Centre Code	Cost centre name	NI Number	Employee no	First Name	Last Name	Position	Position name	Employee Subgroup
2	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2	Teaching assistants
3	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2	Teaching assistants
4	CIP0001	Coronation Street School 1	AA123459A	32350189	MICHELLE	CONNOR	50076652	TEACHING ASST LEVEL 2	Teaching assistants
5	CIP0001	Coronation Street School 1	AA123459A	32350189	MICHELLE	CONNOR	50076652	TEACHING ASST LEVEL 2	Teaching assistants
6	CIP0001	Coronation Street School 1	AA123451A	32350179	HAYLEY	CROPPER	50066784	TEACHING ASST LEVEL 2	Teaching assistants
7	CIP0001	Coronation Street School 1	AA123451A	32350180	HAYLEY	CROPPER	50066784	MID DAY SUPERVISOR	School TT < 52 weeks
8	CIP0001	Coronation Street School 1	AA123453A	32350194	EILEEN	GRIMSHAW	50082783	SENIOR CLERK	School TT < 52 weeks
9	CIP0001	Coronation Street School 1	AA123453A	32350194	EILEEN	GRIMSHAW	50082783	SENIOR CLERK	School TT < 52 weeks
10	CIP0001	Coronation Street School 1	AE123456C	32350513	NICK	TILSLEY	50068945	TECHNICIAN	School TT < 52 weeks
11	CIP0001	Coronation Street School 1	AA123457A	32350183	ANNA	WINDASS	50130305	TEACHER	Teachers

You will know that the data has been highlighted as the cells will turn blue.

- Click on the 'Data' tab on the toolbar.
- Click on 'Sort'.



- Select from the drop down list how you would like to sort the information, e.g. 'Last Name' and the 'Order' e.g. A to Z is alphabetical.
- Click on 'My data has headers'.

- Click 'OK'.

The screenshot shows the SAP Sort dialog box. At the top, there are buttons for 'Add Level', 'Delete Level', 'Copy Level', and 'Options...'. A checkbox labeled 'My data has headers' is checked. Below these are three dropdown menus: 'Sort by' (set to 'Last Name'), 'Sort On' (set to 'Values'), and 'Order' (set to 'A to Z'). At the bottom right, the 'OK' button is highlighted with a red box, and the 'Cancel' button is also visible.

You will see below that the data has now been sorted into alphabetical order by 'Last Name'.

	A	B	C	D	E	F	G	H	I
1	Cost Centre Code	Cost centre name	NI Number	Employee no	First Name	Last Name	Position	Position name	Employee Subgroup
2	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2	Teaching assistants
3	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2	Teaching assistants
4	CIP0001	Coronation Street School 1	AA123459A	32350189	MICHELLE	CONNNOR	50076652	TEACHING ASST LEVEL 2	Teaching assistants
5	CIP0001	Coronation Street School 1	AA123459A	32350189	MICHELLE	CONNNOR	50076652	TEACHING ASST LEVEL 2	Teaching assistants
6	CIP0001	Coronation Street School 1	AA123451A	32350179	HAYLEY	CROPPER	50066784	TEACHING ASST LEVEL 2	Teaching assistants
7	CIP0001	Coronation Street School 1	AA123451A	32350180	HAYLEY	CROPPER	50066784	MID DAY SUPERVISOR	School TT < 52 weeks
8	CIP0001	Coronation Street School 1	AA123453A	32350194	EILEEN	GRIMSHAW	50082783	SENIOR CLERK	School TT < 52 weeks
9	CIP0001	Coronation Street School 1	AA123453A	32350194	EILEEN	GRIMSHAW	50082783	SENIOR CLERK	School TT < 52 weeks
10	CIP0001	Coronation Street School 1	AE123456C	32350513	NICK	TILSLEY	50068945	TECHNICIAN	School TT < 52 weeks
11	CIP0001	Coronation Street School 1	AA123457A	32350183	ANNA	WINDASS	50130305	TEACHER	Teachers

You can also sort by any other of the column headings:

- Cost Centre Code
- Cost Centre Name
- NI Number
- Employee Number
- First Name
- Last Name
- Position
- Position Name
- Employee Sub Group
- Cap. Utilization Lvl
- Weeks Per Year
- Start Date
- End Date
- Absence Type
- Illness Description Code
- Description of illness
- Payroll Days

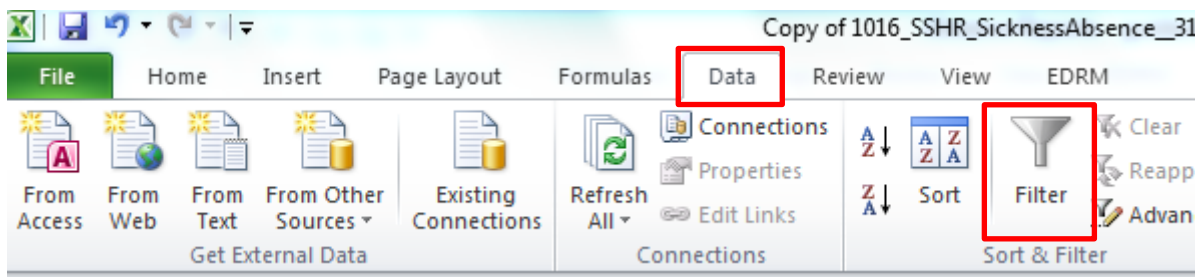
8.9.2 How to filter the Data to display information for one specific type of data.

- Highlight the whole of that data by clicking in the top left hand corner of the spreadsheet.

	A	B	C	D	E	F	G	H	I
1	Cost Centre Code	Cost centre name	NI Number	Employee no	First Name	Last Name	Position	Position name	Employee Subgroup
2	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2	Teaching assistants
3	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2	Teaching assistants
4	CIP0001	Coronation Street School 1	AA123459A	32350189	MICHELLE	CONNOR	50076652	TEACHING ASST LEVEL 2	Teaching assistants
5	CIP0001	Coronation Street School 1	AA123459A	32350189	MICHELLE	CONNOR	50076652	TEACHING ASST LEVEL 2	Teaching assistants
6	CIP0001	Coronation Street School 1	AA123451A	32350179	HAYLEY	CROPPER	50066784	TEACHING ASST LEVEL 2	Teaching assistants
7	CIP0001	Coronation Street School 1	AA123451A	32350180	HAYLEY	CROPPER	50066784	MID DAY SUPERVISOR	School TT < 52 weeks
8	CIP0001	Coronation Street School 1	AA123453A	32350194	EILEEN	GRIMSHAW	50082783	SENIOR CLERK	School TT < 52 weeks
9	CIP0001	Coronation Street School 1	AA123453A	32350194	EILEEN	GRIMSHAW	50082783	SENIOR CLERK	School TT < 52 weeks
10	CIP0001	Coronation Street School 1	AE123456C	32350513	NICK	TILSLEY	50068945	TECHNICIAN	School TT < 52 weeks
11	CIP0001	Coronation Street School 1	AA123457A	32350183	ANNA	WINDASS	50130305	TEACHER	Teachers


You will know that the data has been highlighted as the cells will turn blue.

- Click on the ‘Data’ tab on the toolbar.
- Click on ‘Filter’.



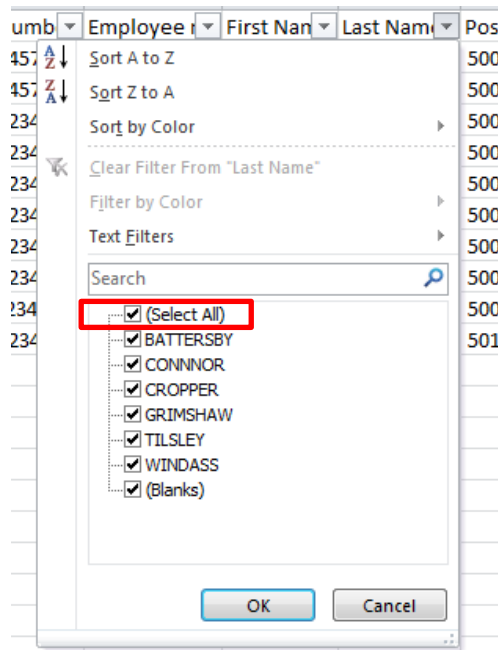
You will see the filter icon appear to the right of each column heading:

To filter by employee:

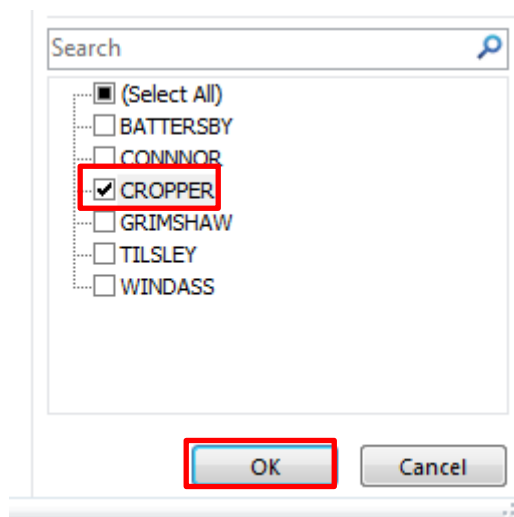
- Click on the filter icon  to the right of the heading you want to set the filter for e.g. last name.

	A	B	C	D	E	F	G	H
1	Cost Centre Code	Cost centre name	NI Number	Employee no	First Name	Last Name	Position	Position name
2	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2
3	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2
4	CIP0001	Coronation Street School 1	AA123459A	32350189	MICHELLE	CONNOR	50076652	TEACHING ASST LEVEL 2
5	CIP0001	Coronation Street School 1	AA123459A	32350189	MICHELLE	CONNOR	50076652	TEACHING ASST LEVEL 2
6	CIP0001	Coronation Street School 1	AA123451A	32350179	HAYLEY	CROPPER	50066784	TEACHING ASST LEVEL 2
7	CIP0001	Coronation Street School 1	AA123451A	32350180	HAYLEY	CROPPER	50066784	MID DAY SUPERVISOR
8	CIP0001	Coronation Street School 1	AA123453A	32350194	EILEEN	GRIMSHAW	50082783	SENIOR CLERK
9	CIP0001	Coronation Street School 1	AA123453A	32350194	EILEEN	GRIMSHAW	50082783	SENIOR CLERK
10	CIP0001	Coronation Street School 1	AE123456C	32350513	NICK	TILSLEY	50068945	TECHNICIAN
11	CIP0001	Coronation Street School 1	AA123457A	32350183	ANNA	WINDASS	50130305	TEACHER

- Remove the tick to the left of (Select All) by ‘clicking’ in the box.



- Put a tick in the box to the left of the employee you wish to view data for by ‘clicking’ in the box. E.G ‘Cropper’.



- Click ‘OK’.

You will now see that your information has been filtered to just display all sickness absence for H Cropper.

	A	B	C	D	E	F	G	H	I
1	Cost Centre Coc	Cost centre name	NI Numb	Employee	First Nam	Last Nam	Positio	Position name	Employee Subgrou
6	CIP0001	Coronation Street School 1	AA123451A	32350179	HAYLEY	CROPPER	50066784	TEACHING ASST LEVEL 2	Teaching assistants
7	CIP0001	Coronation Street School 1	AA123451A	32350180	HAYLEY	CROPPER	50066784	MID DAY SUPERVISOR	School TT < 52 weeks
13									

You can set a filter for each of the different headings.