

HR & Payroll Secure Area Reports

There are several SAP Fiori reports which are uploaded to the Secure Area (Perspective Lite) of SchoolsNet for you to access and download.

Each school will have at least two users who can access the Secure Area. For access and support, please contact the Childrens Services Management Information Team on:

cs.schoolsupport@derbyshire.gov.uk.

Some reports are available monthly and others quarterly.

These reports are downloaded from Perspective Lite in a csv format.

However, to make the reports easier to read, we have a spreadsheet convertor file which changes the csv file into an Excel format. Please email the Budget Manager Support team at cst.budgetsupport@derbyshire.gov.uk to request this.

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Section 1 List of HR and Payroll Secure Area Reports

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)	17th
Accrued leave report *	Monthly (where applicable)	27th
SAP Fiori users report	Quarterly (March, June, September, December)	30th
School Workforce missing qualifications*	Quarterly (March, June, September, December)	30th
School Workforce missing staff details*	Quarterly (March, June, September, December)	30th

(*These reports will only be available where the criteria applies.)

Section 1.1 Inventory report

(School DfE Number_SSHREstabInventory<Date>)

This is a monthly report of all Inventory items (current, pending write off and written off) recorded on your SAP Fiori inventory.

It is uploaded on the 1st of each month onto the Secure Area.

Please use this Secure Area Inventory report rather than run a complete Inventory report from SAP Fiori, as running the report is very resource hungry and may slow the SAP Fiori system down for other users.

It is possible to run inventory reports directly from SAP Fiori (for example, for a list of items to be written off to present to Governors).

See the **Inventory** section of our SchoolsNet pages for guidance.

Section 1.2 Absence reports

(School DfE Number_SSHRSicknessAbsence <Date>) and
(School DfE Number_SSHROtherAbsence <Date>)

There are two Absence reports, available monthly and uploaded on the 17th of each month to the Secure Area.

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

For example, the April 2022 report covers the period from 1st April 2021 to 31st March 2022.

The Secure Area absence reports are:

- **Sickness report** – this report covers any period of sickness or industrial injury within the last 12 months

Name: (School DfE Number_SSHRSicknessAbsence <Date>)

- The column headings of the report are shown below:

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

- **Other Absence report** – this report details all absence types excluding sickness, for example Medical appointments, Special leave, Time off for dependants within the last 12 months

Name: (School DfE Number_SSHROtherAbsence <Date>)

- The column headings of the report are shown below:

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

To assist your absence monitoring, in SAP Fiori you can also run a monthly summary of absences (**PT91 monthly absence report**).

See our HR & Payroll page of SchoolsNet for guidance.

Section 1.3 Val Basis report

(School DfE Number_SSHRValBasis<Date>)

This monthly report uploaded on the 17th of each month, 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 be presented at the next Governors meeting.

This report will only be generated when the above circumstances apply.

Section 1.4 Accrued Leave report

(School DfE Number_SSHRAccruedLeave <Date>)

This monthly report uploaded on the 27th, 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.

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

The column headings for the Accrued Leave report are as shown below:

School Number	Personnel number	Title	First Name	Surname	Position number	Position name	Weeks Per Year	Wage Type	Hours
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Section 1.5 SAP Fiori users report

(School DfE Number_SSHRSchoolRoles <Date>)

This report is being updated. If you require information re your system users please e-mail cst.budgetsupport@derbyshire.gov.uk

This report will show your current SAP Fiori and VIM users and is published quarterly on the 30th.

It is important to check this report to ensure that only the users listed require SAP Fiori system access. If there are any users on the list who are no longer at your school or no longer require system access, please complete a **HALO request** (to delete user).

Section 1.6 School Workforce missing qualifications report

(School DfE Number_IRASSWFCensus <Date>)

This quarterly report, uploaded on the 30th, details any missing qualifications for teaching assistants and teachers, required for your School Workforce Census (SWF).

The column headings for SWF Missing Qualifications are:

School Number	Employee	First Name	Last Name	Position Name	Leaving Date
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Please see the **School Workforce** guidance on the SAP Fiori **HR and Payroll page** on SchoolsNet to aid you in updating these records in SAP Fiori.

Section 1.7 School Workforce missing staff details report

(School DfENumber_SSHRSchoolsit3215And\senco <Date>)

This quarterly report, uploaded on the 30th, details any missing staff details/SENCO details for teaching assistants and teachers, required for your School Workforce Census (SWF).

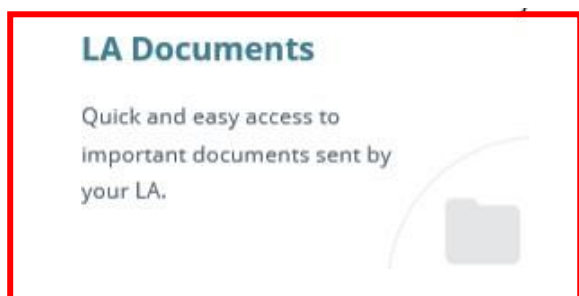
Please see the **School Workforce** guidance on the SAP Fiori **HR and Payroll page** on SchoolsNet to aid you in updating these records in SAP Fiori.

Section 2 How to locate the reports on the Secure Area of SchoolsNet (Perspective Lite)

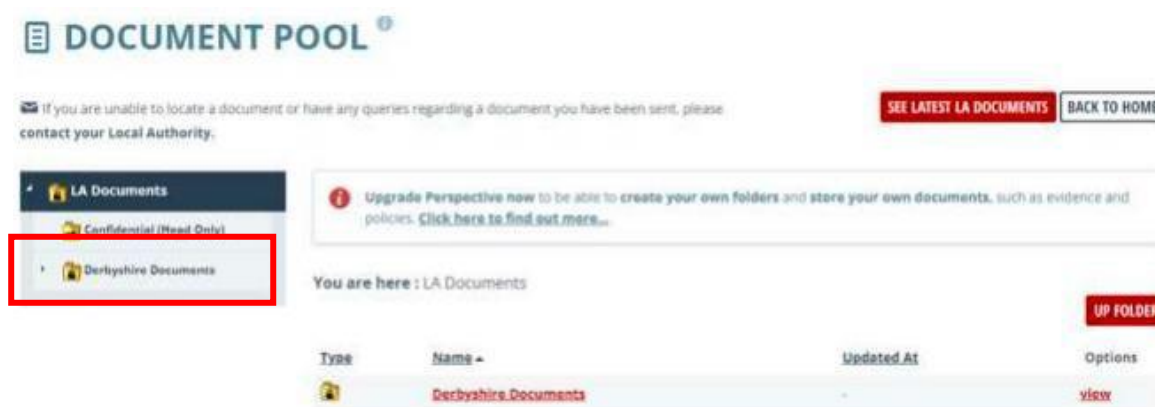
Please note that access to Perspective Lite is restricted to a limited number of users per school. Access requests are managed by the Childrens Services Management Information Team who can be contacted on 01629 536789 or by email cs.school.support@derbyshire.gov.uk.

The full Perspective Lite user guide can be found on SchoolsNet.

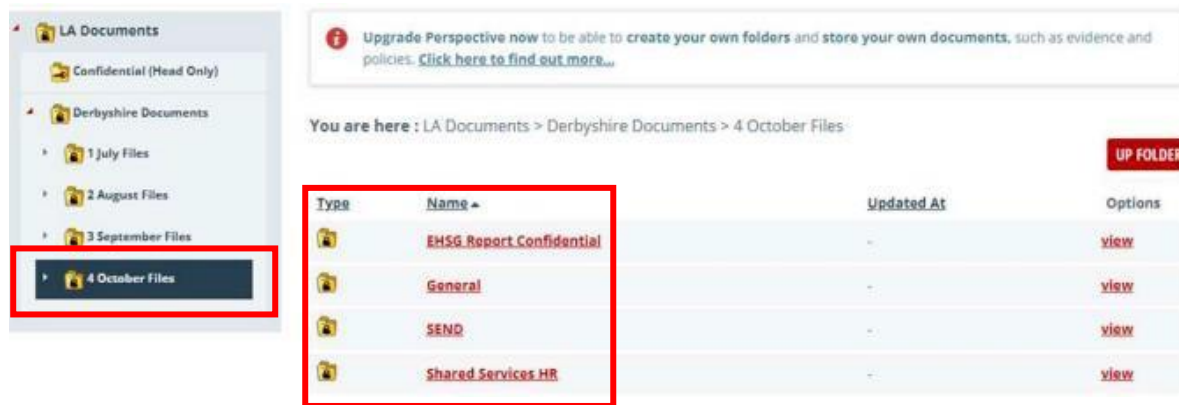
Having logged into Perspective Lite click on **LA Documents**



- Click on **Derbyshire Documents**



- You will then see folders for the latest four months of the year. Click into the relevant month to view the four folders within – each folder will only be visible if there are documents within.



The screenshot shows the Perspective Lite interface. On the left, a sidebar lists document folders: 'LA Documents' (with sub-folders 'Confidential (Head Only)' and 'Derbyshire Documents'), '1 July Files', '2 August Files', '3 September Files', and '4 October Files' (which is highlighted with a red box). The main area displays a breadcrumb trail: 'You are here : LA Documents > Derbyshire Documents > 4 October Files'. Below this is a table of documents. The table has columns for 'Type', 'Name', 'Updated At', and 'Options'. The 'Name' column is also highlighted with a red box. The table contains four rows of documents, all with a 'view' option.

Type	Name	Updated At	Options
	EHS&G Report Confidential	-	view
	General	-	view
	SEND	-	view
	Shared Services HR	-	view

The reports generated from SAP Fiori will appear in the **Shared Services HR** folder.

All documents uploaded to the Secure Area on Perspective Lite are only available for 90 days. It is advisable that you download any files sent to you onto your school's network.

Section 2.1 How to save the report as a CSV file

Select the **CSV file** you wish to save, for example
830XXXX_SSHRSicknessAbsence31 012018

- Click **File** (top left hand corner of the screen) and click **Save as**
- Navigate to the location to save the file to (**must be on a secure network drive on your PC**)
- Give your file a name (for example, Sickness absence July 2022)
- Click **Save** at the bottom left hand corner of your screen
- Your report has now been saved as a CSV file

Section 3 How to convert a CSV file to an Excel spreadsheet

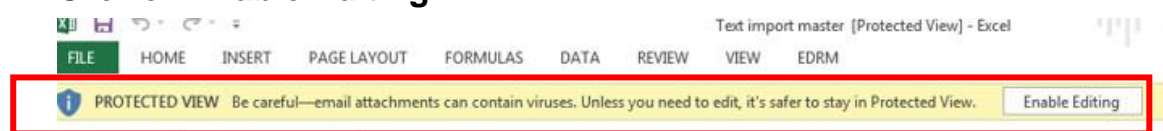
To view the data easily or sort the data into a format that suits your school's requirements, convert the CSV file to Excel by using our text import master spreadsheet.

Email the Budget Manager Support team at cst.budgetsupport@derbyshire.gov.uk requesting the **Text import spreadsheet file**.

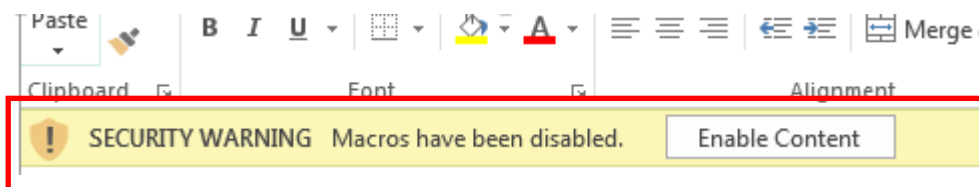
Save this text import spreadsheet file to a secure network drive, to use each time you want to convert a CSV file to Excel

To convert a CSV file to an Excel spreadsheet:

- Open the **text import spreadsheet** file
- Click on **Enable Editing**



- Click on **Enable Content** until the yellow bar disappears

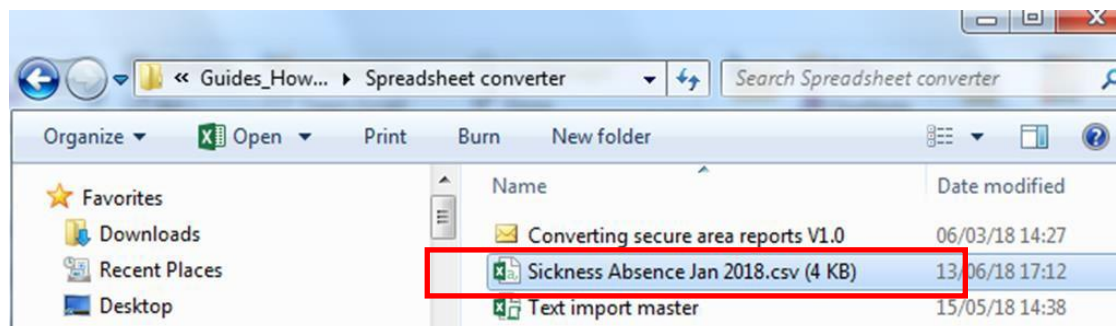


- Click on **Click here to Import a CSV file**



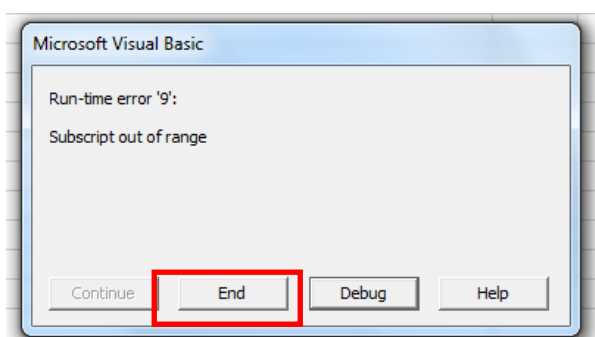
- Navigate to your **saved CSV file**

- **Double click** on the CSV file



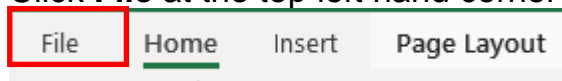
- The report will now open in the Excel spreadsheet format

If you receive a runtime error message then click on End

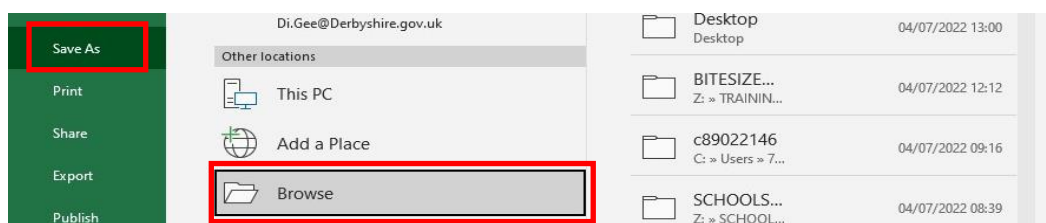


Your data will now have converted to an Excel spreadsheet
To save in this format:

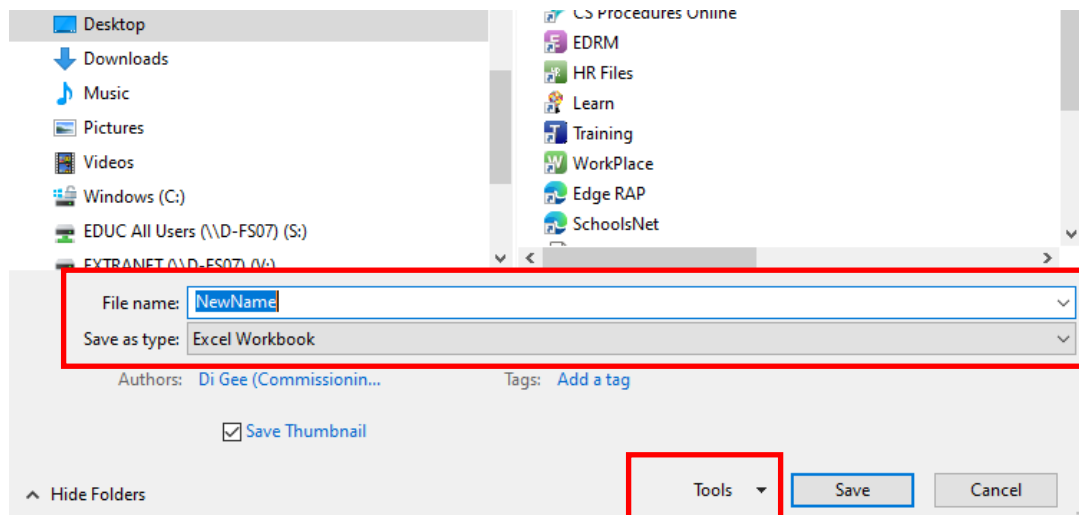
- Click **File** at the top left hand corner of your screen



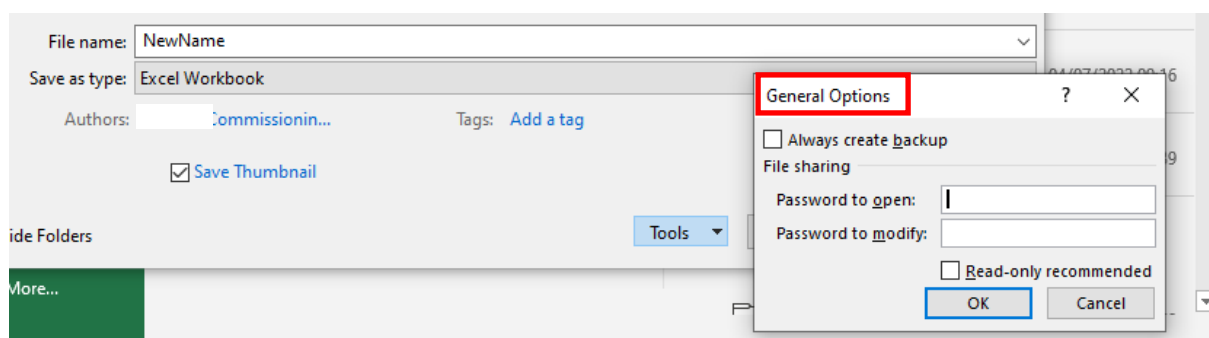
- Click **Save As** and then click **Browse** to navigate to the location to save the file to



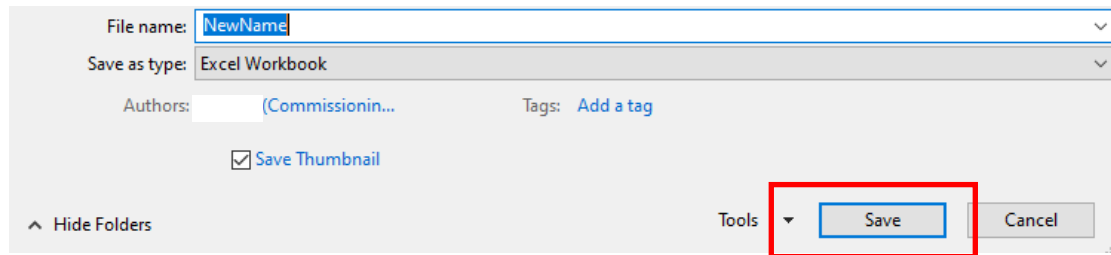
- Give your file a name
- Click on the **Save as Type** drop down and select Excel, for example, **Excel Workbook**
- To Save the file as password protected:
 - Click on **Tools** at the bottom right of the screen.
 - Click on **General Options**



Enter a password to open and a password to modify, as required and click **OK**



- Now 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 sort the data into a format that suits your school's requirements.

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

Section 3.1 How to sort the data

The instructions below are for using Microsoft Office 2010. If you are using another version, please email the Budget Manager Support Team for assistance.

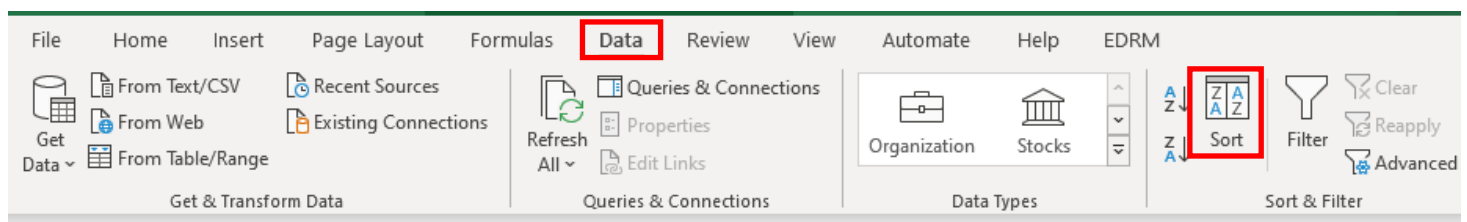
Ensure all data is selected before sorting. If not, data may be sorted incorrectly.

- 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	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

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

- Click on the **Data** tab on the toolbar and click on **Sort**



- Select from the drop down list how you would like to sort the information, for example **Last Name** and the **Order**, for example A to Z is alphabetical.

- Click on **My data has headers**
- Click **OK**

The screenshot shows a 'Sort' dialog box with the following settings:

- My data has headers:** ☒
- Sort by:** Last Name
- Sort On:** Values
- Order:** A to Z
- OK** button is highlighted.

- You will see 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:

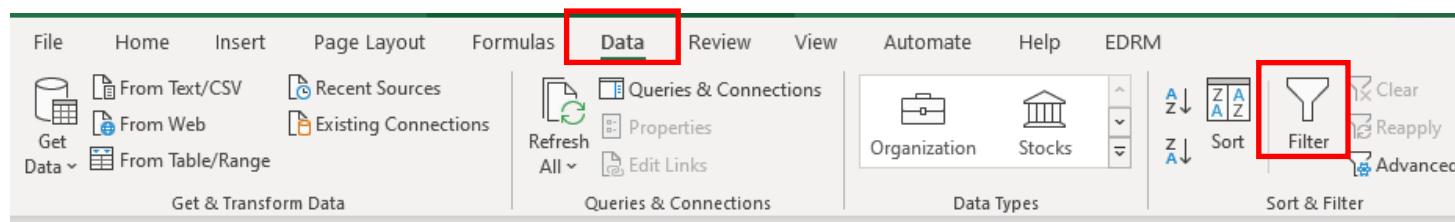
- Cost Centre Code
- Cost Centre Name
- NI Number
- Employee Number
- First Name
- Last Name
- Position
- Position Name
- Employee Sub Group
- Cap. Utilization Lvl
- Weeks Per Year
- Start Date
- End Date
- Absence Type
- Illness Description Code
- Description of illness
- Payroll Days

Section 3.2 How to filter 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	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 will know that the data has been highlighted as the cells will turn blue.
- Click on the **Data** tab on the toolbar and click on **Filter**



- You will see the Filter icon appear to the right of each column heading

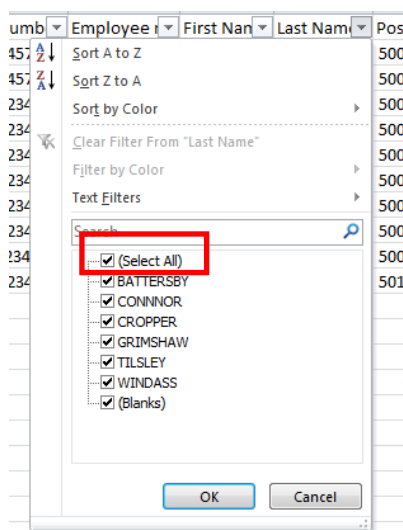
	A	B	C	D	E	F	G	H
1	Cost Centre Cod	Cost centre name	NI Numbe	Employee	First Nan	Last Name	Positio	Position name
2	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2
3	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2

To filter by employee:

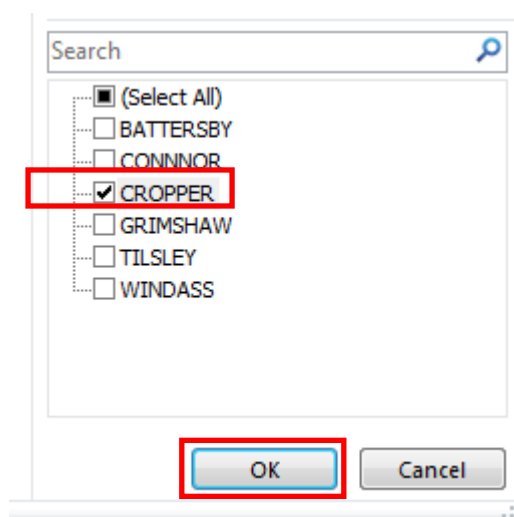
- Click on the filter icon  to the right of the heading you want to set the filter for, for example Last name

	A	B	C	D	E	F	G	H
1	Cost Centre Cod	Cost centre name	NI Numbe	Employee	First Nan	Last Name	Positio	Position name
2	CIP0001	Coronation Street School 1	AA145787A	32350512	LEANNE	BATTERSBY	50068562	TEACHING ASST LEVEL 2

- Remove the tick to the left of **Select All**



- Put a tick in the box to the left of the employee you wish to view data for, for example, Cropper. Then click **OK**



- You will now see that your information is filtered to display all sickness absence for H Cropper

	A	B	C	D	E	F	G	H	I
1	Cost Centre Co	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									