



# Reports Dashboard User Guide

## Scheduling Module



## Introduction

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This user guide will provide an overview of the Reports Dashboard including layout, button functions, navigation, report types, and associated data tools.

The Reports Dashboard provides easy navigation of topic-specific reports including the Schedule Planning, Leave, Shift Count, Productivity, and others. Schedule reports may be sorted based on variables such as Employee, Location, Availability, Shift, and Time.

StaffReady is a cloud-based software solution, meaning all reports utilize your real-time, up-to-the-second data. One of our goals at StaffReady is to assist you in making better data-driven staffing decisions, and the Reports Dashboard helps harness the power of data residing in your custom license.

Once you've mastered the Reports Dashboard, you'll be able to utilize real-time data to better analyze your business data. Other related topics are listed on the Resources Page.

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## Reports Dashboard Summary

The Reports Dashboard is an improvement over our earlier Reports feature. We have streamlined the report creation process and made the interface more intuitive to use. This feature will eventually replace the current Reports tab and is accessible by selecting the Home Menu (**Figure 1**) or from the the main landing page.

While most functions of the Reports feature have remained the same, there have been a few minor changes which will be outlined on the following pages. Instead of the radio buttons that were previously used we now have a grid of options to choose from. (**Figure 2**)

Selecting any of these options will begin the process of generating a report and prompt you to select a filter (i.e. filter by employee, shift etc. These choices may vary depending on the report type selected.)

You will then be asked to select a schedule (choices will be limited to the schedules you have permission to edit), a specific beginning and ending date (or you can pick from the preset ranges of a year, a month, and the current week you are in). Once you have selected your report criteria, select **Apply** (**Figure 3**).

After a brief period of processing, the report will generate and you will be able to select which format to download it in.

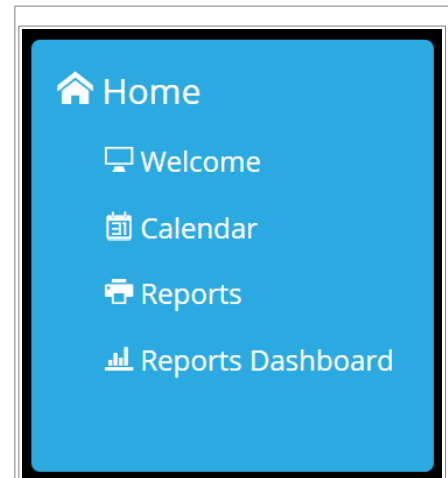


Figure 2

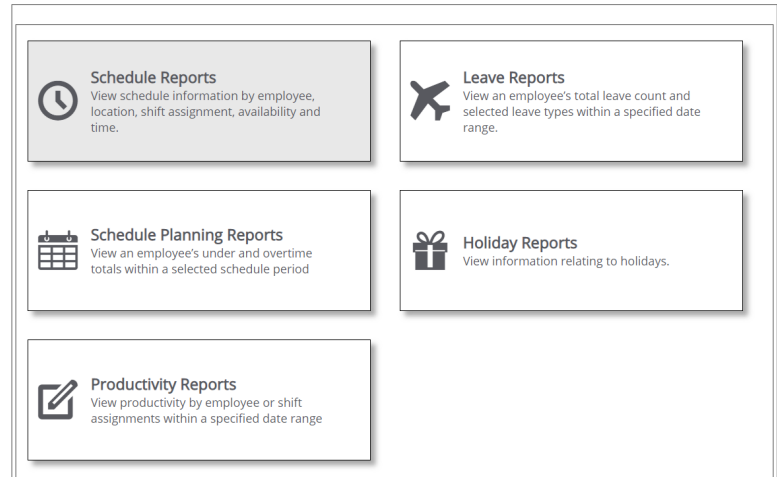


Figure 1

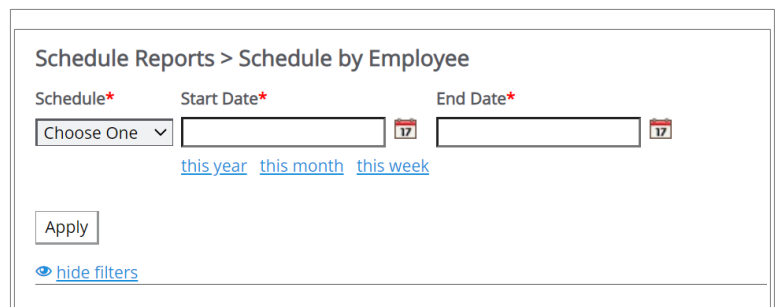


Figure 3

**Note:** Depending on your criteria and the size of the report, it may take a minute or more to process.

## Schedule Reports

Schedule Reports are used for high level data collection and include all employees assigned to the date range you selected. The five filters you can use when generating these reports are by Employee, by Availability, by Location, by Shift, and by Time. **(Figure 1)**

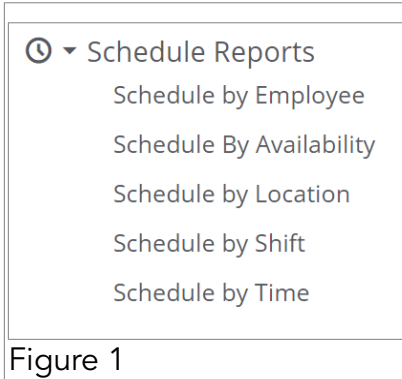


Figure 1

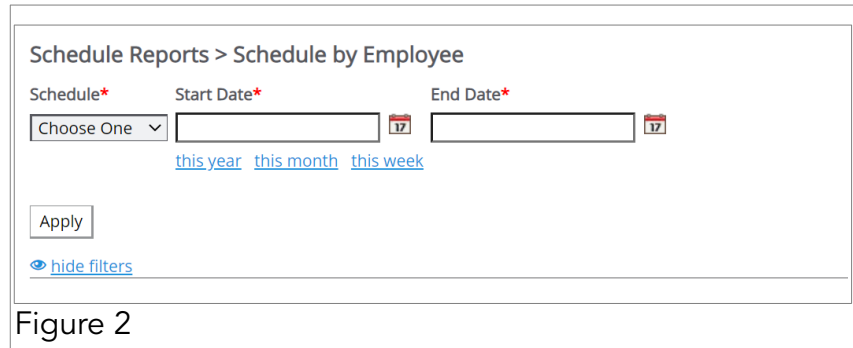


Figure 2

### Schedule Report Filters

'By Employee' will display which Employee is assigned to which shift on each day.

'By Availability' will highlight which employees are available during a given period of time who are not currently assigned.

'By Location' will highlight the time and the position that employees will be working in during a selected schedule period.

'By Shift' will display a grid of all shift assignments that exist within the selected time period and who is assigned to it on a specific day.

'By Time' will focus on a single day broken down into 30 minute increments each of which display the shift and employee during that time.

Once you've selected all initial report criteria **(Figure 2)**, you will need to choose what format to download your report in. Options for exporting remain the same as they were under the previous Reports tab. Options are slightly different depending on which filter you selected initially.

If you selected either by Employee or by Availability you will have the option to download a PDF report with time or as a tag (without time) as well as an Excel file. **(Figure 3)**

If you choose to filter by Location you can download as a PDF with the time displayed.

Choosing by Shift will allow you to download as Excel or PDF Tag.

Filtering by Time generates an HTML report viewable within StaffReady.

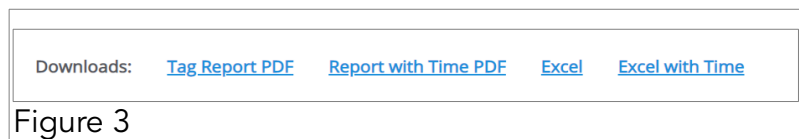


Figure 3

## Schedule Planning Reports

**Schedule Planning Reports** focus on an individual employee and are used to show which employees will work overtime and which of them are below the minimum hours they are required to work within a set time period. (Figure 1)

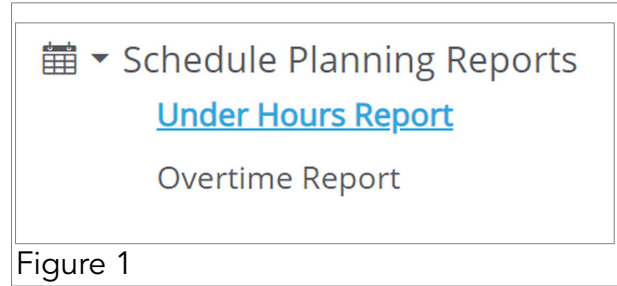


Figure 1

Selecting the **Under Hours Report** option and then selecting your desired schedule and schedule period (Figure 2) will display a grid format listing all relevant employees, their minimum required hours, and how many hours they are currently assigned.

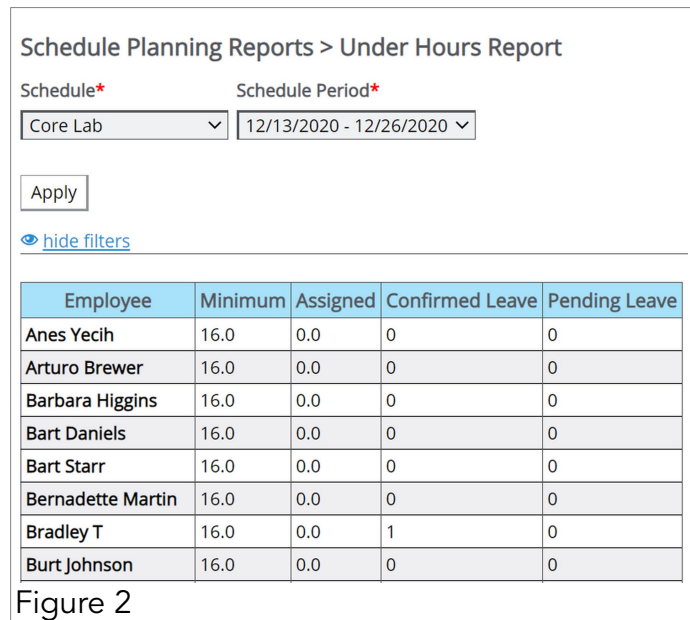


Figure 2

Selecting the **Overtime Report** option will prompt you to again choose your desired schedule and schedule period. Any highlighted cell represents an instance in which, at the end of the scheduled shift, an employee will have exceeded their maximum number of hours. (Figure 3)

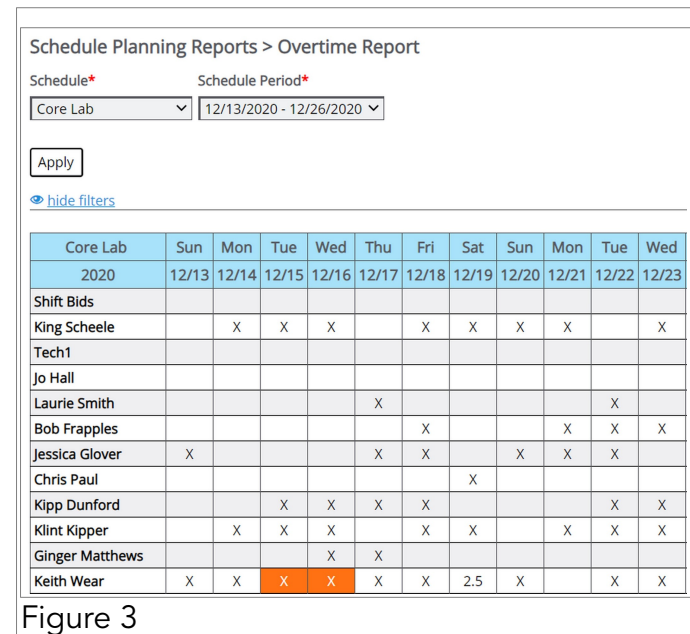


Figure 3

## Holiday Reports

**Holiday Reports** will generate reporting based on which employees are approved to work or not work holidays within StaffReady. By default, there are no preset holidays in StaffReady Scheduling. In order for this feature to function, you must first manually set up designated holidays. Please consult the Holiday Setup guide located here.

Once you have setup holidays within StaffReady, you must also set which employees are working on those holidays and which employees have leave. Both of these set up steps must be completed prior to running this report or you will be given a warning.

**(Figure 1)**

Select your desired department and date range and select Apply. Cells highlighted in green indicate which personnel are not working on the holidays that you have set up. **(Figure 2)**



**Holiday Reports > Holiday Report**

Department\* Start Date\* End Date\*

Chemistry 12/19/2020 12/26/2020

[this year](#) [this month](#) [this week](#)

Apply

[hide filters](#)

Figure 1

**Holiday Reports > Holiday Report**

Department\* Start Date\* End Date\*

Core Lab 12/19/2020 12/26/2020

[this year](#) [this month](#) [this week](#)

Apply

[hide filters](#)

2020	12/25
Department: Core Lab	Christmas Day
Barbara Dodd	
Benny Mason	
Ignacio Silva	
Jessica Glover	
Lester Schwartz	
Ginger Matthews	
Lewis Wood	
Orville Gilbert	
Danielle Garrett	
Leonard Curtis	
Gary Long	

Figure 2


## Leave Reports

**Leave Reports** are used to view the total number of personnel on leave and the duration of their leave during a set schedule period.

Reports are generated by selecting either the **Leave Report** or the **Leave by Day Report** options.

If you choose the **Leave Report** option, the report will display how many times and what type of leave (FMLA, Holiday, Jury Duty, PTO or Sick) an employee took during the designated period. **(Figure 1)**

Selecting the **Leave by Day** option expands the report to include a break down of each day within the date range you selected of all leave requests as well as their specific date and time. **(Figure 2)**



### Leave Reports

View an employee's total leave count and selected leave types within a specified date range.

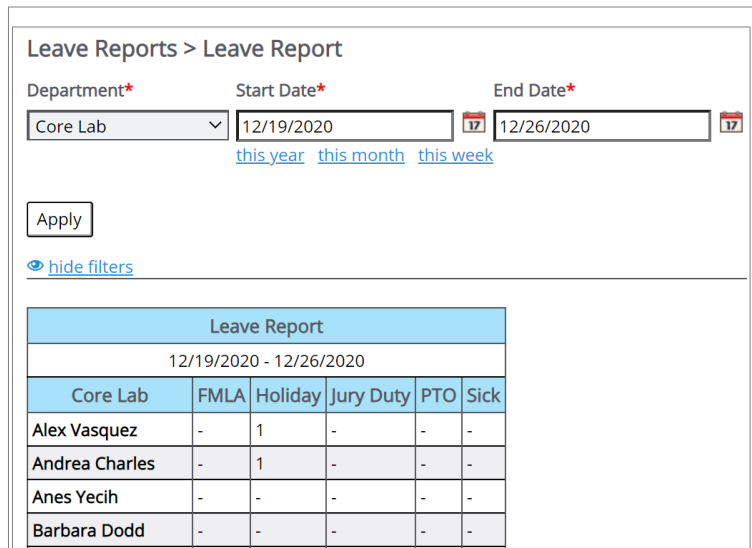


Figure 1

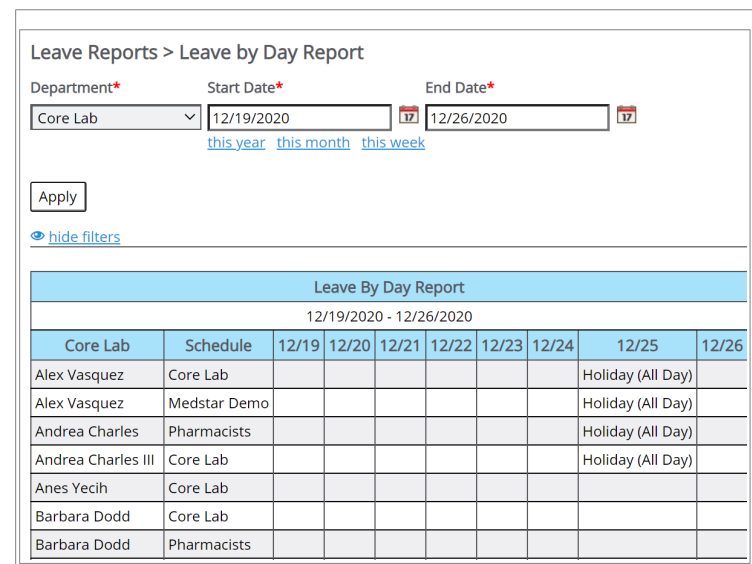


Figure 2

# Shift Count Reports

The **Shift Count Reports** is used to view the total number of shifts an employee has been assigned within a specific date range.

Selecting **Shift Counts by Person** allows you to focus on an individual employee's shifts. Select your schedule, employee and date range and then select apply. The report will display an 'x' in every shift id that that employee is assigned to. **(Figure 1)**

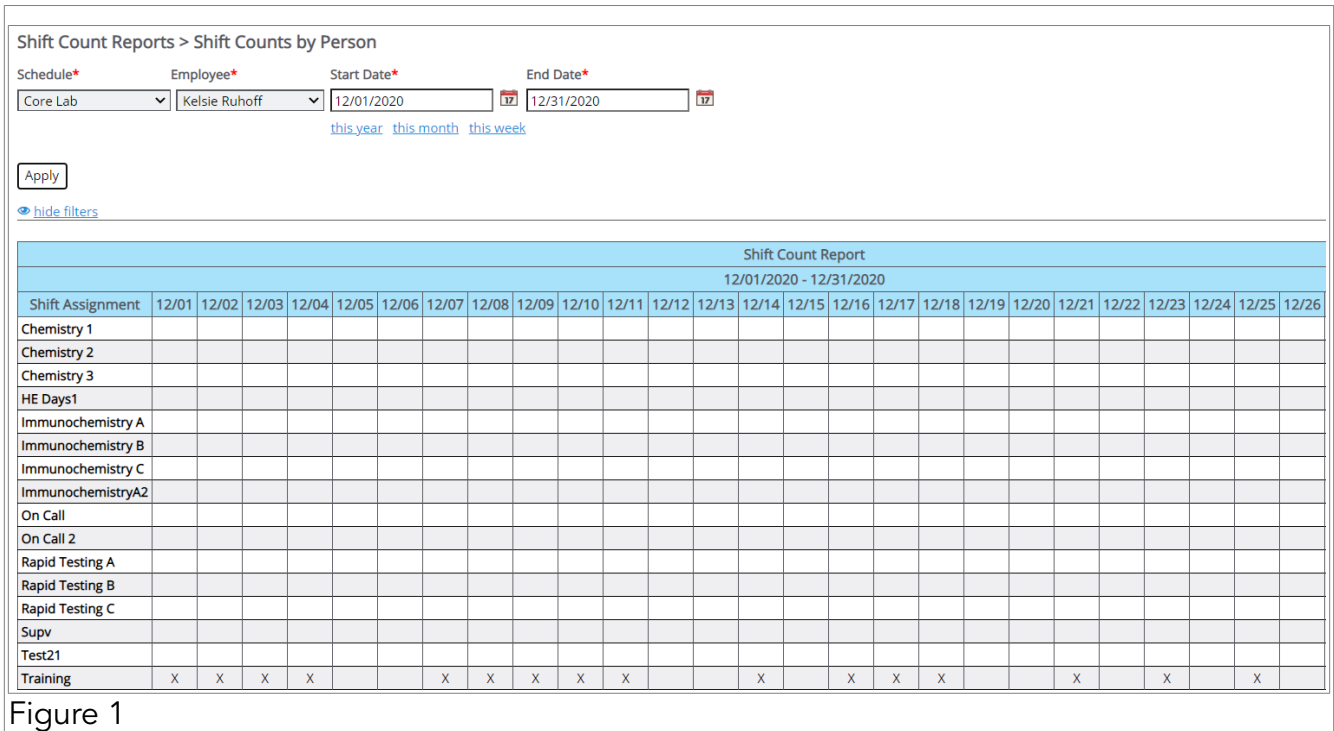


Figure 1

Selecting the **Shift Counts** option will give you the total number of shifts for each employee within that schedule as well as the number of times an employee is assigned to a specific shift. **(Figure 2)**

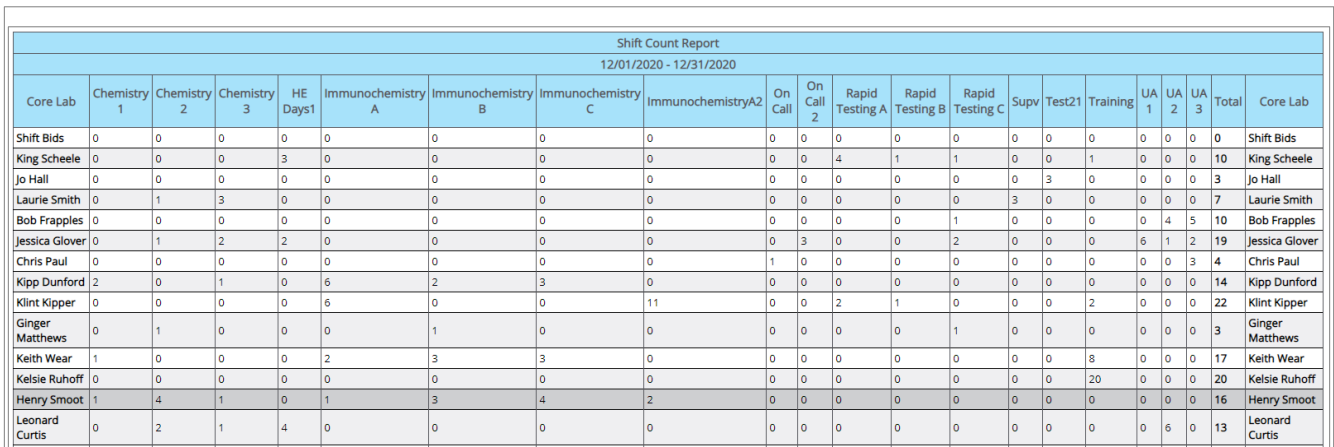
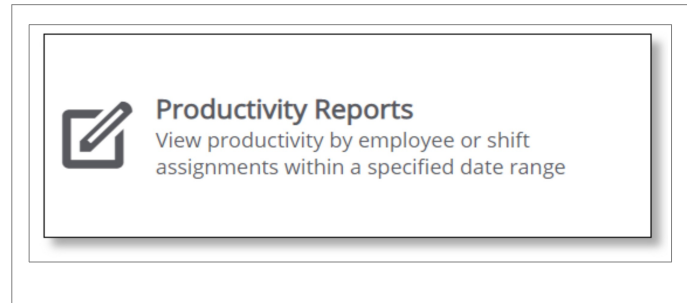


Figure 2

# Productivity Reports

**Productivity Reports** are filtered 'by Employee' and 'by Shift'. As before, you will need to select the schedule you wish to generate a report for, a start and end date (or select one of the preset options) and then select apply to generate the report.



Selecting **By Employee** will generate an itemized report, listing Schedule Id, Job Description ID, Shift ID, the employees' name on the schedule, their employee ID, Start and End date for whatever increment of time you entered and finally the total sum of the hours they are scheduled for in a particular shift and schedule. (Figure 1 & 2)

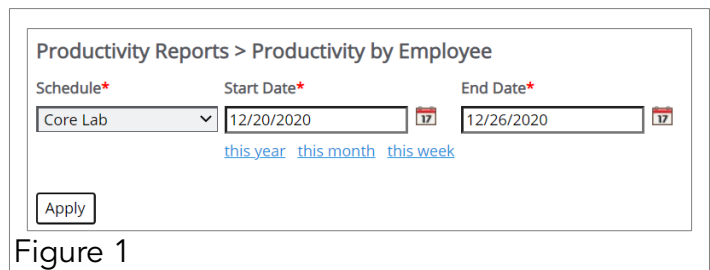


Figure 1

Schedule Id	Job Description Id	Shift Id	Name on Schedule	Employee Id	Start Date	End Date	Hours
Core Lab	Chemistry	Chemistry 1	Andrea Charles III	ACharles	12/20/2020	12/26/2020	16.00
Core Lab	Chemistry	Chemistry 1	Hillary Scot	HScot	12/20/2020	12/26/2020	8.00
Core Lab	Chemistry	Chemistry 1	Lewis Wood	LWood	12/20/2020	12/26/2020	8.00
Core Lab	Chemistry	Chemistry 1	Orville Gilbert	OGilbert	12/20/2020	12/26/2020	8.00
Core Lab	Chemistry	Chemistry 2	Andrea Charles III	ACharles	12/20/2020	12/26/2020	16.00
Core Lab	Chemistry	Chemistry 2	Hillary Scot	HScot	12/20/2020	12/26/2020	8.00

Figure 2

Selecting **By Shift** will generate an abbreviated report containing the total number of hours for a shift within a set time period. It will not display employee name or the specific hours that the employee worked. (Figure 3)

Schedule Id	Job Description Id	Shift Id	Start Date	End Date	Hours
Core Lab	Chemistry	Chemistry 1	12/20/2020	12/26/2020	40.00
Core Lab	Chemistry	Chemistry 2	12/20/2020	12/26/2020	40.00
Core Lab	Chemistry	Chemistry 3	12/20/2020	12/26/2020	56.00
Core Lab	Immunochemistry	Immunochemistry A	12/20/2020	12/26/2020	40.00
Core Lab	Immunochemistry	Immunochemistry B	12/20/2020	12/26/2020	40.00
Core Lab	Immunochemistry	Immunochemistry C	12/20/2020	12/26/2020	40.00
Core Lab	Immunochemistry	ImmunochemistryA2	12/20/2020	12/26/2020	40.00
Core Lab	On Call	On Call	12/20/2020	12/26/2020	0.00
Core Lab	On Call	On Call 2	12/20/2020	12/26/2020	56.00

Figure 3

## Resources

This concludes the User Guide for the **Reports Dashboard**. While not being an exhaustive resource, we hope that you have at least a cursory knowledge of this feature and how it functions within the entire framework of the Scheduling Module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

If you are not able to find a document that addresses your issue within our training media, don't worry! By selecting the **Need Help** link (**Figure 1**) located at the top of every page in StaffReady, you can access our Help Bot which will do a keyword search for the topic you're looking for.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

### [Online Support Form](#)



Figure 1

## Related Topics

Please select any link to skip to that topic.

<a href="#">Holiday Setup</a>	<a href="#">PDF Document</a>
<a href="#">Leave Types</a>	<a href="#">PDF Document</a>
<a href="#">Leave Calendar</a>	<a href="#">PDF Document</a>
<a href="#">My Schedules</a>	<a href="#">PDF Document</a>