Ascent Consulting Services Pvt. Ltd.

User Guide for Smart Reports v1.1 – (Client Perspective)

Revision History

Sl. No	Version No.	Author	Reviewed By	Date	Revision
1.	1.0	Prasanth R	Premraj	7th July, 2015	Created New User Guide/Manual
2.	1.1	Manikandan S		9th Jan, 2017	Updated Screenshots & Technical Content

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About Ascent Consulting Services Pvt. Ltd.

People Management is a key business function that has a direct impact on competitiveness, efficiency of operations, and long-term profitability of an organization. Which is why, organizations have been investing enormous time and resources in the HR function, which diverts focus from the organization's core business.

Ascent Consulting precisely addresses this anomaly through its 360 degree HR Management Solutions that transform the HR service delivery. While these solutions accomplish cost reduction, greater efficiencies and improved quality, our larger effort is aimed at improving organizational efficiency and not just creating incremental change.

AscentHR has achieved this by building the right mix of skills and knowledge required for an effective Outsourced HR Management function. Our solutions employ a matrix of technology, domain expertise, streamlined business workflow, and highly skilled people to create tangible, measurable, performance improvements throughout the client's organization.

AscentHR is recognized as one of the most trusted partners in this business by clients around the world. We work as an extension of our client's business. Our management and delivery teams are passionate about building efficiencies in our client's business.

Our bespoke technology solutions for HR Needs are unique in the industry and are backed by the best of industry practices in Data management, Information Security, Data Privacy, anywhere access and very user friendly processes.

At AscentHR automation of all the functions is achieved through a robust, configurable and comprehensible **HRMS** application which caters to diverse organizational strategies and standards.

Preface

About this Manual

This manual provides guidelines for the user on Smart Reports – How to generate various reports using filters – How to download reports in various file format.

Intended Audience

This manual is intended for AscentHR Clients

Document Conventions

In this manual, certain words are represented in different fonts, and sizes.

Bold indicates the name of menu items, options, dialog boxes, windows and functions.

Additionally this document has different strategies to draw User attention to certain pieces of information. In order of how critical information is to your system, these items are marked as a note, and tip.

Icon	Purpose
	Note
	Tip

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Getting Started

Login to the Smart Reports (With OTP)

In order to access smart report, follow these steps:

1. Login into PowerHR site.

2. Navigate to **HR Support** page and click the **Smart Reports** link.

Figure 1: User Clicks Smart Reports link

3. Type the OTP sent to the registered email id
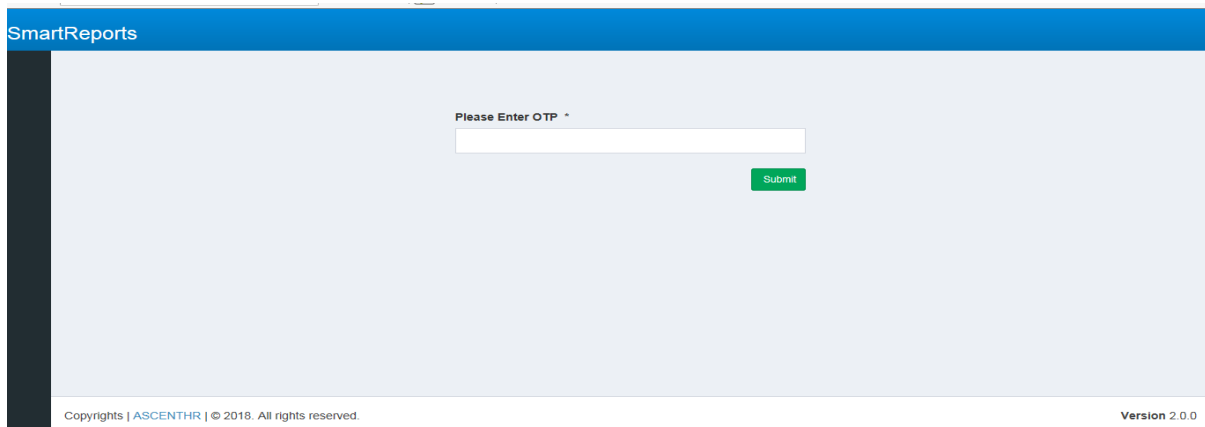
Figure 2: User Enters the OTP

4. Click **Submit**, to be navigated to Dashboard Page as shown below.

✓ **If OTP authentication is not defined, user navigated to Dashboard page once he/she clicked Smart Reports link.**

Smart Reports

- Navigation within the application is through menus. Smart Reports has the following menus

    - ✓ Dashboard
    - ✓ Report
    - ✓ Download

Dashboard

- Post Login, user views **Dashboard** page as default with various sections as shown in the below screenshot.
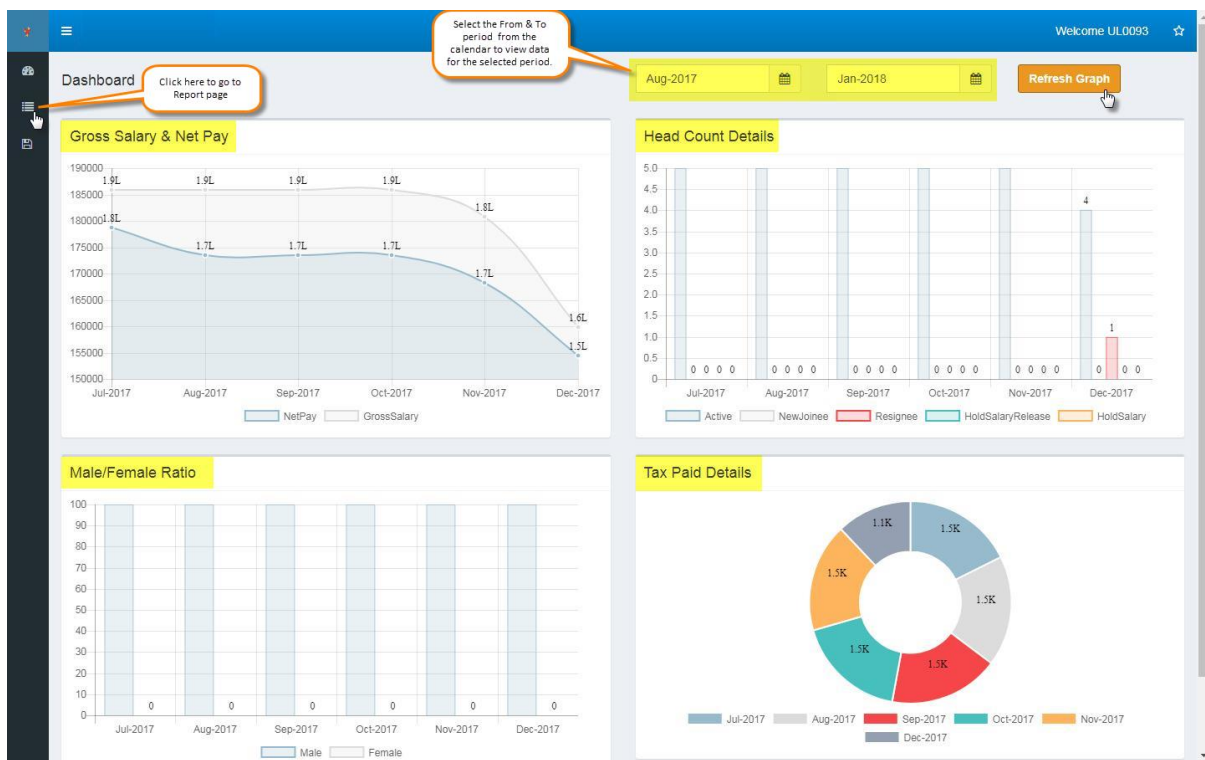
Figure 3: User views Dashboard Page

- User views various **sections** on dashboard page such as:

    - ✓ Gross Salary & Net pay
    - ✓ Head Count Details

✓ Male/Female Ratio

✓ Tax Paid Details

- Select the **From & To period** from the calendar & click **Refresh Graph** to view details for the selected period.

- Click **Report** menu, and will be navigated to '**Report'** page as shown in the screenshot below.

Report
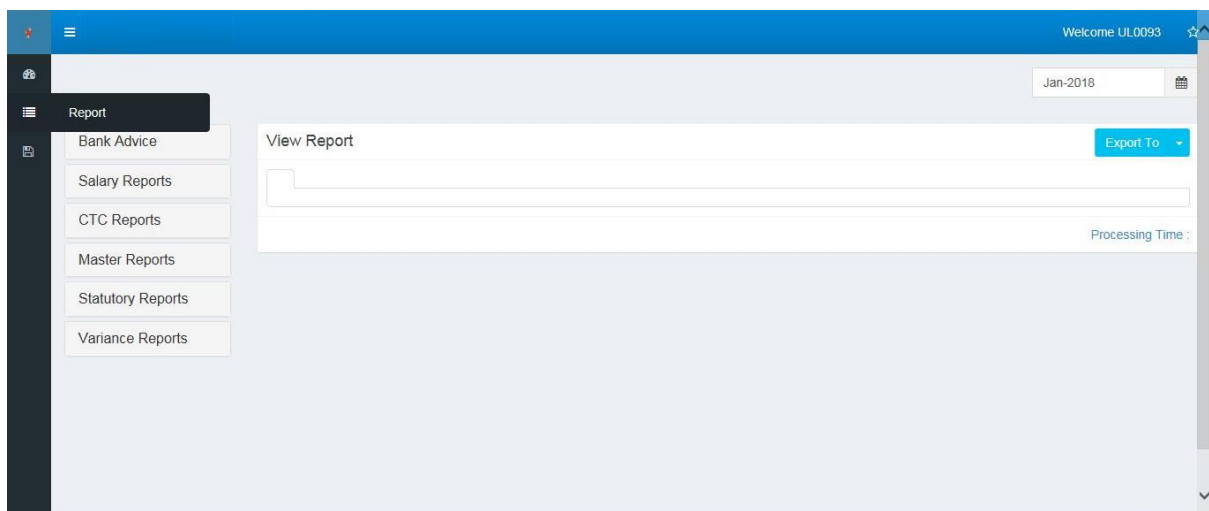
Figure 4: User Views Reports page

- In **Report** page, user can view the reports related to following sections.

  ✓ Bank Advice

  ✓ Salary Reports

  ✓ CTC Reports

  ✓ Master Reports

  ✓ Statutory Reports

  ✓ Variance Reports

- Under **Bank Advice** section user can view & download the following reports.

  ✓ Bank Advice Active Report

  ✓ Bank Advice Consolidated Report

     Confidential   **Powered By**
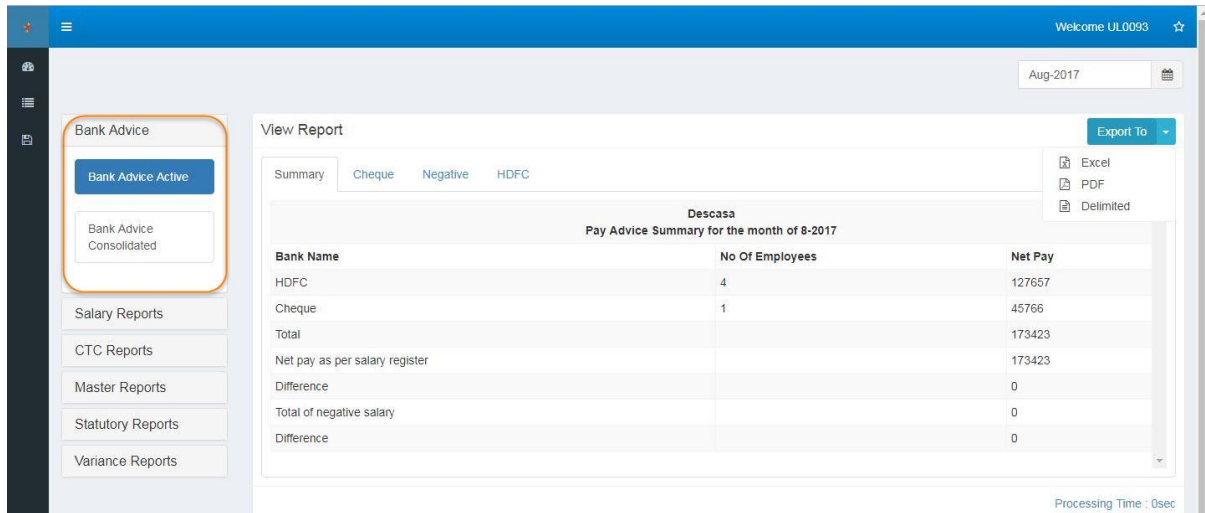
Figure 5: Bank Advice Section

- Under **Salary Reports** section user can view & download the following reports.

  ✓ Cost Center Report

  ✓ F and F Register Report

  ✓ Hold Salary Report

  ✓ Negative Salary Report

  ✓ Salary Register Active Report

  ✓ Salary Register Consolidated Report

  ✓ Variable Pay Report

  ✓ Zero Salary Report
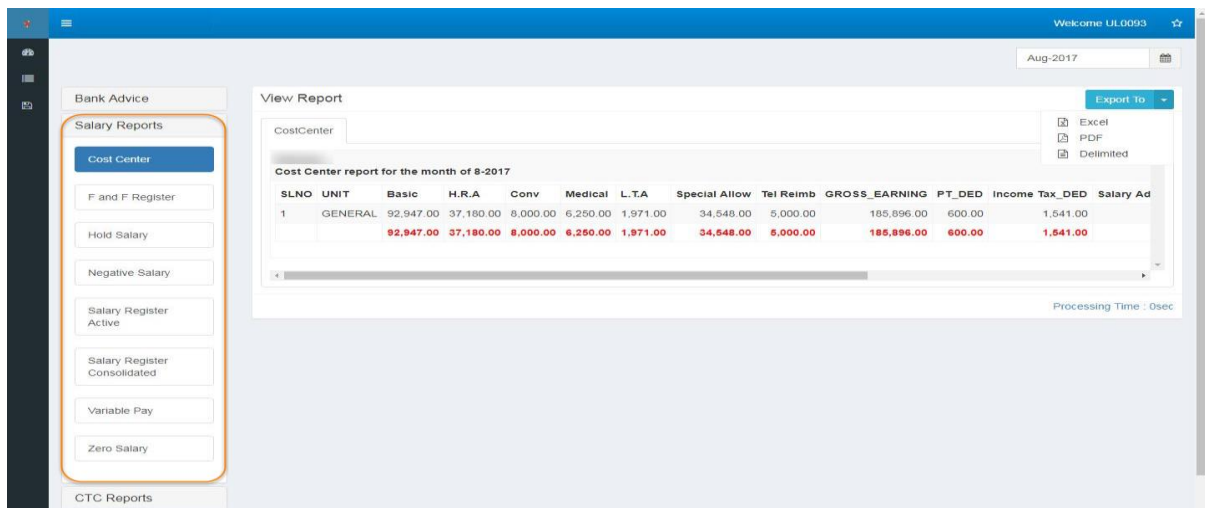
Figure 6: Salary Reports Section

- Under **CTC Reports** section user can view & download the following reports.

  - ✓ CTC Checklist Report
  - ✓ CTC/FBP Eligibility Report
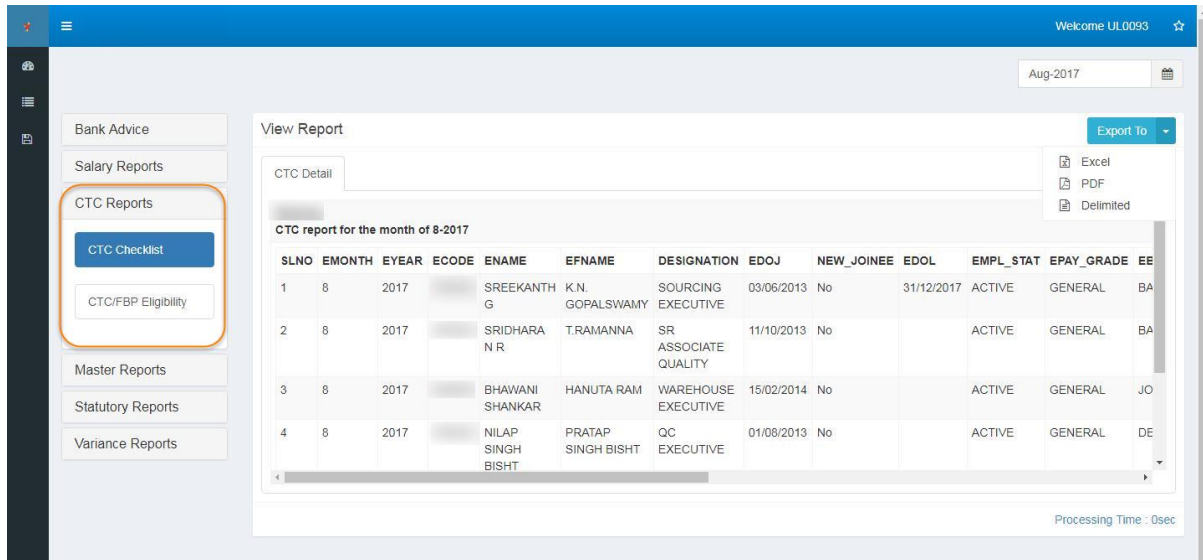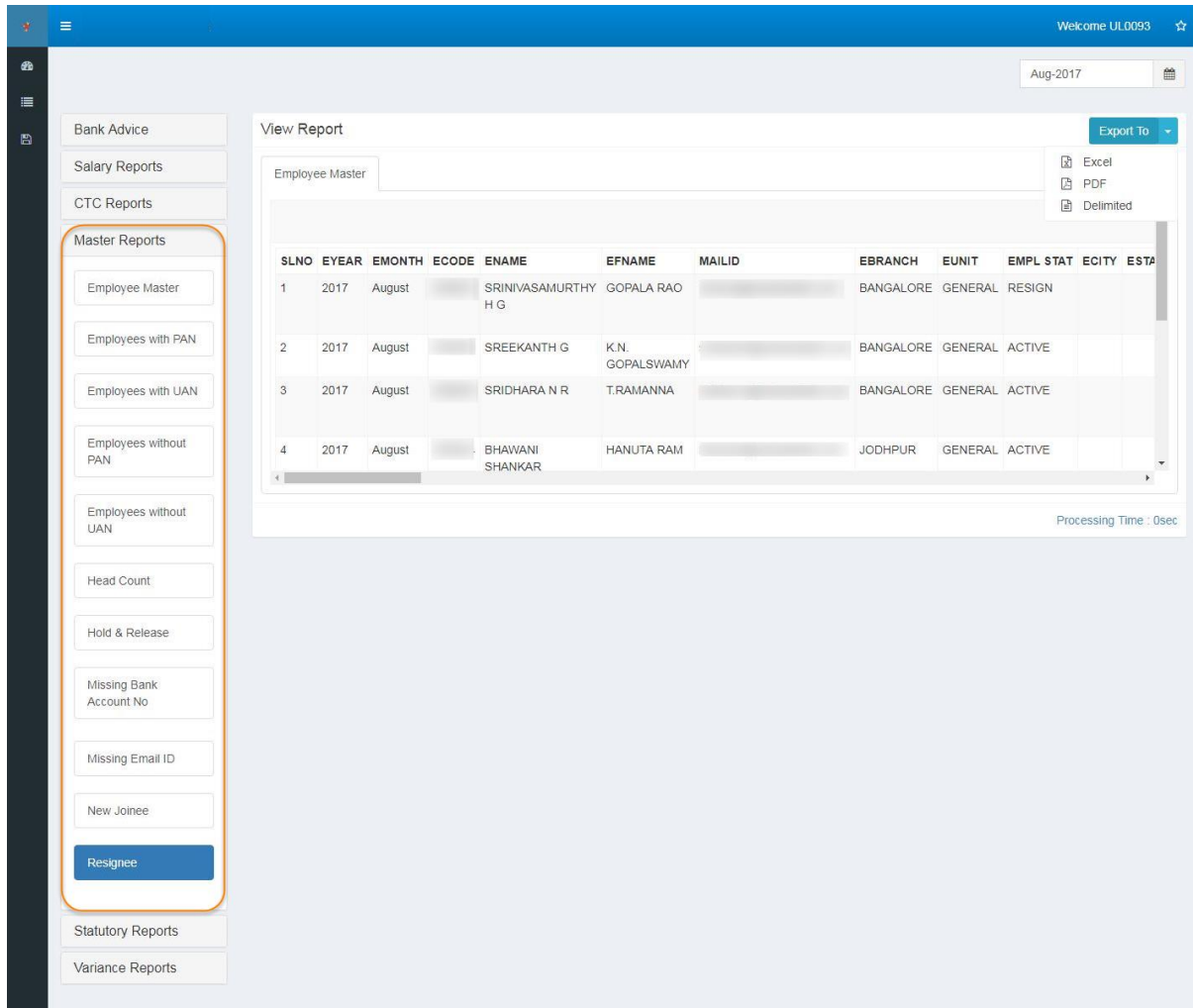
Figure 7: CTC Reports section

- Under **Master Reports** section user can view & download the following reports.

  - ✓ Employee Master Report
  - ✓ Employees with PAN Report
  - ✓ Employees with UAN Report
  - ✓ Employees without PAN Report
  - ✓ Employees without UAN Report
  - ✓ Head Count Report
  - ✓ Hold & Release Report
  - ✓ Missing Account No Report
  - ✓ Missing Email ID Report
  - ✓ New Joinee Report
  - ✓ Resignee Report

Figure 8: Master Reports section

- Under **Statutory Reports** section user can view & download the following reports.

  ✓ ESI Report

  ✓ LWF Report

  ✓ PF Checklist Report

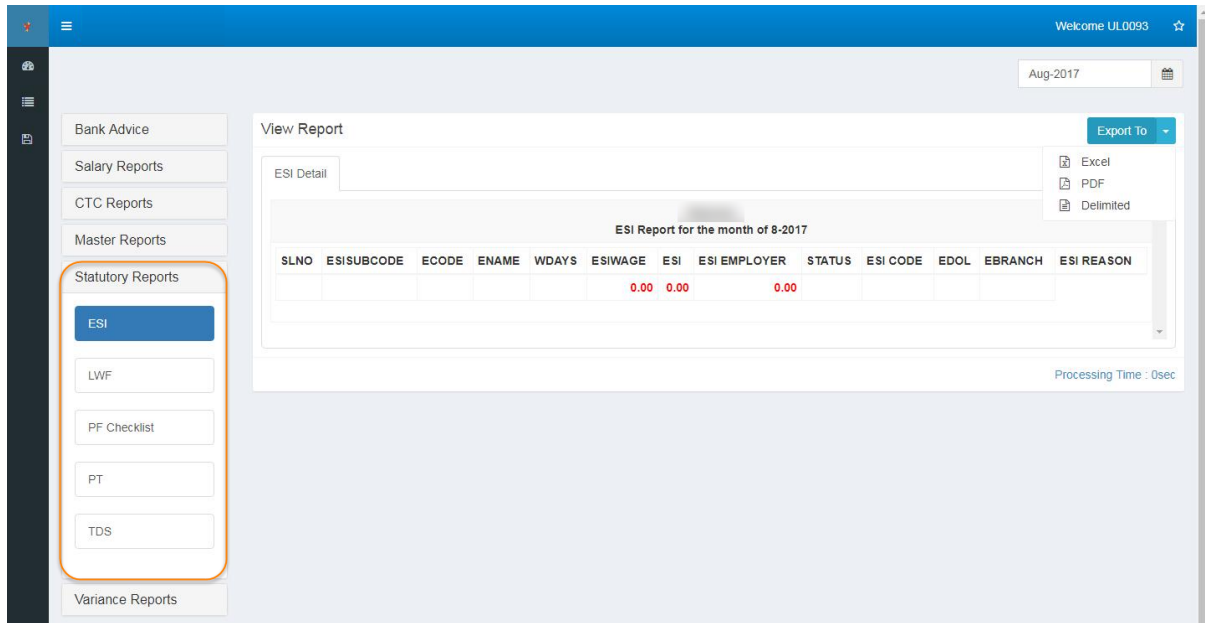 ✓ PT Report

  ✓ TDS Report

Figure 9: Statutory Reports section

- Under **Variance Reports** section user can view & download the following reports.

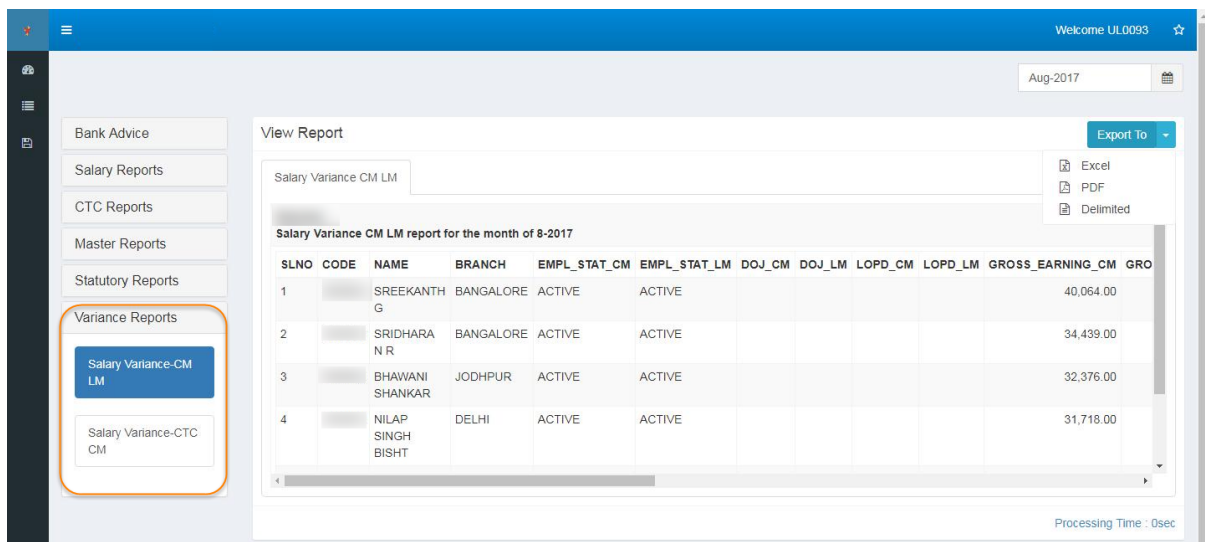   ✓ Salary Variance CM LM Report
    ✓ Salary Variance CTC_ CM Report

Figure 10: Variance Reports section

To download any report, follow below steps:

Example: Salary Variance CTC_CM Report

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1. Click **Salary Variance CTC_CM** Report link as shown in the below screenshot.

2. Select the **period** from the calendar & click **Enter** to view details for the selected period as shown below.
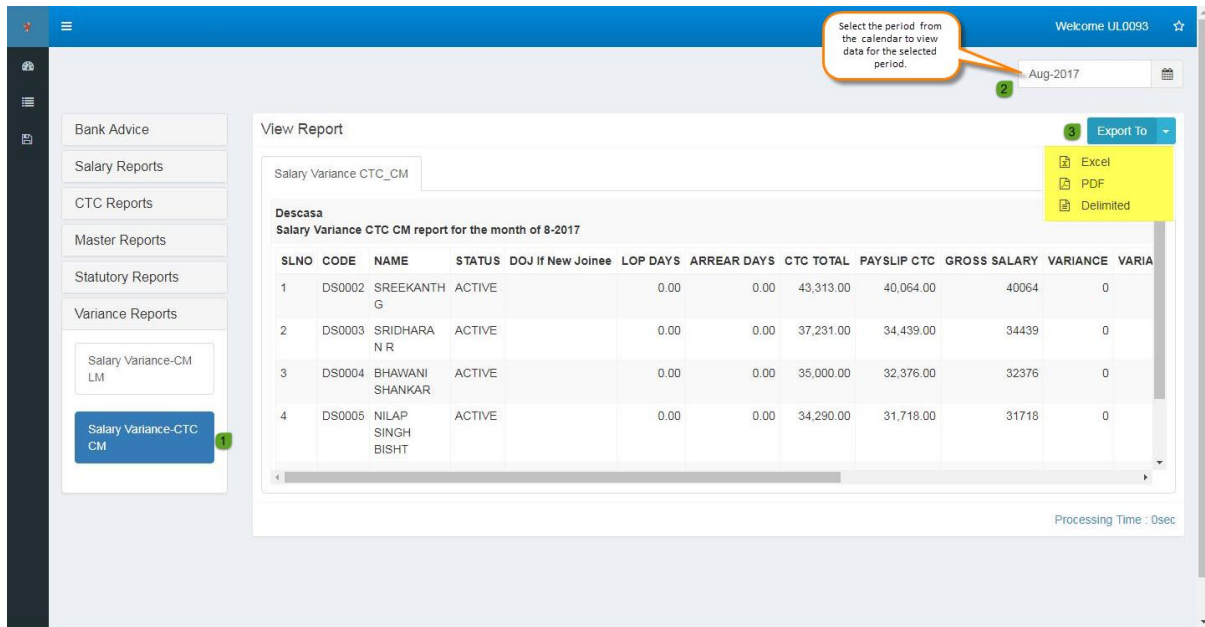

Figure 11: User Exports Report

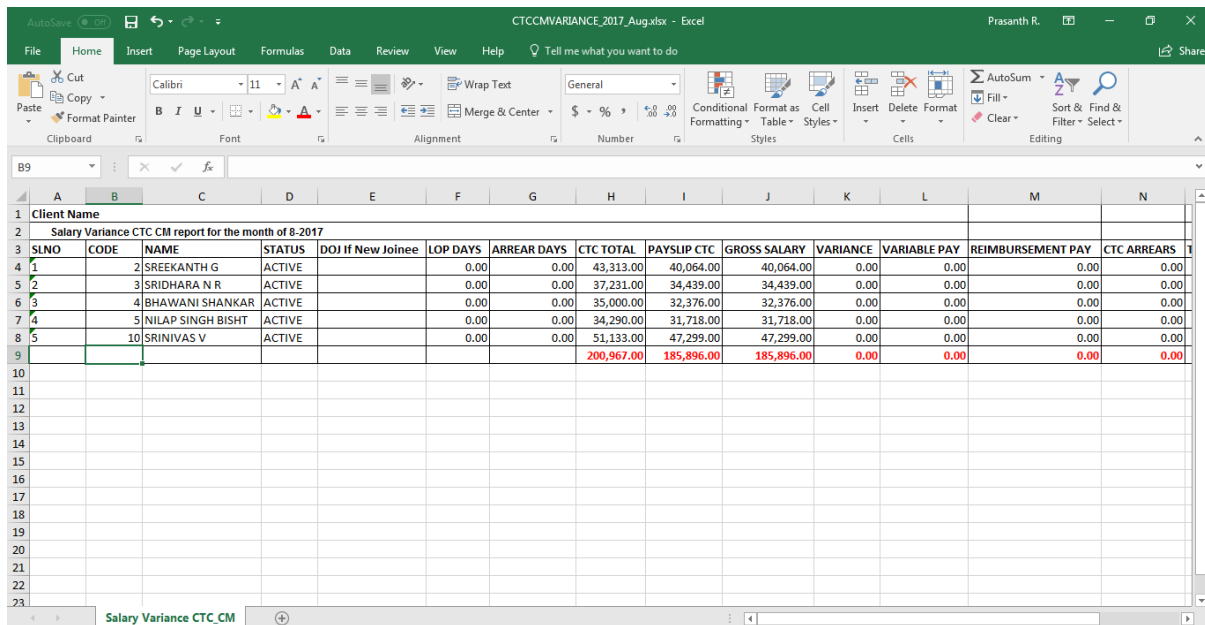3. Select the **Export To** type file format to export the report successfully.

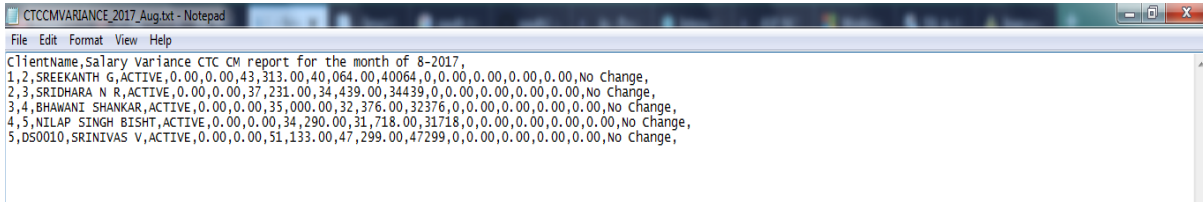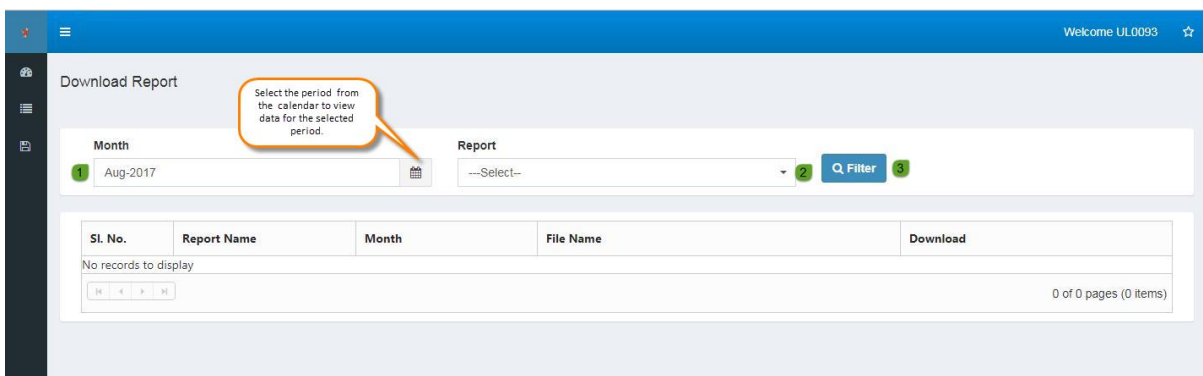
Figure 12: Salary Variance CTC_CM Report – Sample (Excel)

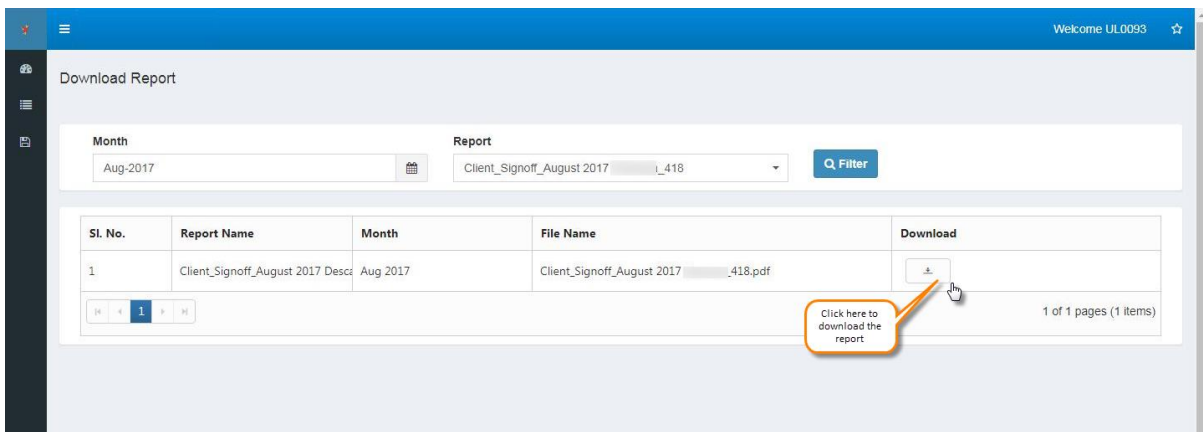**Figure 13: Salary Variance CTC_CM Report – Sample (Text)**

- Click **Download** menu, and will be navigated to '**Download Report'** page as shown in the screenshot below.

Download

To download any report from download report section, follow below steps:

1. Select the **period** from the calendar.

2. Select the report that user want to download from **Report** dropdown options & click **Filter**.

- Click [download icon] 'Download' to download the report successfully.