

Creating Grouped Reports in Vizual Personnel Manager

In addition to creating simple list reports and summary reports, it is possible to create more advanced reports within Personnel Manager whereby we use data from more than one table and display the information in a 'grouped' layout.

The benefits of this type of report are that we can not only show the details (as with the List Report) but also totals (as with the Summary Report).

A good example of this would be a report that shows the training history for an employee that also shows the total days and total cost of all training for each employee.

Stage 1 - Designing your report (the thought process)

As with List and Summary Reports, the first and most important step is to make a note of what criteria you need for the report. For this the process is very similar to creating a list report, however, Grouped reports require more effort when it comes to the designing of the layout of the report in order to create the 'group' sections.

NOTE: With grouped reports, it is sometimes beneficial 'sketching' what you want the report to look like before creating it.

In order to create our Grouped report, we need to know the following information:

1. Report Title
2. Table/Screen Name
3. Field Names
4. Sort Order
5. Filters (Search Criteria)

The following steps guide you through the thought process for 'designing' your report. Once done you can then create the report using the instructions in Stage 2.

1. Report Title

The first step is to write down the title or summary of the report. Doing this, we are already thinking about what our report is about which will help when it comes to setting up the report.

In this example, we will be creating a report showing a list of Training Records grouped by each active employee. We will call this our 'Individual Training Profile' report.

2. Choose Screens/Tables

Behind each of the screen you see within Personnel Manager there is a table of information, hence you will often see them referred to as a screen or a table – it's effectively the same thing.

For this report, we will need the **Employee Details** screen and the **Training History** screen.

NOTE: Because we are still at the 'thought process' stage and are simply making notes about what we need to build our report, we can open Personnel Manager and double check where our data is stored if need be.

3. Choose which Fields are to be displayed in the report.

Fields are the boxes which appear on the screen. Again, at this point we can still take a look in Personnel Manager to find the correct name of the field. In our example, we need the following fields:

- Employee Number

- Surname
- Firstname
- Department
- Date
- Course
- Subject
- Duration
- Cost

Note, we have chosen the fields in the order we want them to appear across the top of the report to save time later.

4. Choosing the Sort Order

In this example, we want to group the training records by each employee. Because it is possible to have employees with the same surname (and firstname) we have to group by the Employee Number field as this is the only definite unique field in the system for each employee. This means we must also sort by the Employee Number, however Personnel Manager will do this automatically for you when you finish using the report wizard.

We can however sort the training records in a specific order once the report has been sorted by employee. In this example we will sort by Course Date.

5. Filters (selecting which employees to display)

The final step is where we tell the system who we want to be displayed in our report. In this case, we only want to see Active employees. Obviously, we can search on any data in the database (providing it is all entered correctly with the correct spelling and case).

When making a note of what filters we want to use, we recommend always using a table like the example below:

	Filter 1	Filter 2	Filter 3	Filter 4
Table	Employee Details			
Field	Status			
Operator	Is Equal to			
Value	Active			

We can apply many different filters, but in this example, we will only be using the Status = Active filter

Now we have gone through the thought process, designing our report, we can now begin to create it within Personnel Manager.

Stage 2 - Creating a New Report using the Wizard

For best results, use the Report wizard to select the data you wish to view in your report, BUT change the criteria, such as filters and sorting whilst Editing the report.

The first step is to select the Tables and Fields you wish to use for this report. Once this is done we can begin applying filters and changing the sort order.

To create a new Grouped report (Individual Training Profile)

1. Click on the Reports button on the Personnel Manager toolbar
2. Click on the folder within the report explorer, where you want the report to be saved (i.e. Reports folder)

3. Click the NEW button on the toolbar
4. Choose REPORT and enter a name for the report in the box provided
5. Next
6. Choose the Employee Details table by double clicking on it
7. Choose the Training History table by double clicking on it
8. Click Next
9. Choose the fields to be used in the report identified in Stage 1 by double clicking on each one in the left-hand panel
10. Click Next
11. Click Next 4 times
12. On the Group screen within the wizard we need to choose a field we wish to group the report by. We will group by the Employee Number field by double clicking on it from within the Available Fields area.
13. Click Next 3 times
14. Click Finish.
15. A new window will open showing the Layout Page view. Click Maximise

At this point the report is still not complete. If we try to preview it you will get a message offering to set the Sort Order Automatically. Click Yes.

We must edit the Layout of the report to make the final changes, however we will set the other criteria in the Define Search Tab first.

Define Search Tab

The Define Search Tab is where we can edit the data used in the report, whether it be adding additional fields, changing the sort order or applying filters.

The top half of the Define Search screen is where our chosen tables are shown. In our example, this will be the MASTER (Employee Details) and TRAINING (Training History) tables.

In the bottom half of the screen you will see the FIELD GRID which displays various properties relating to your chosen fields, the first of which should be the HEADER and this describes which fields have been chosen for use in this report.

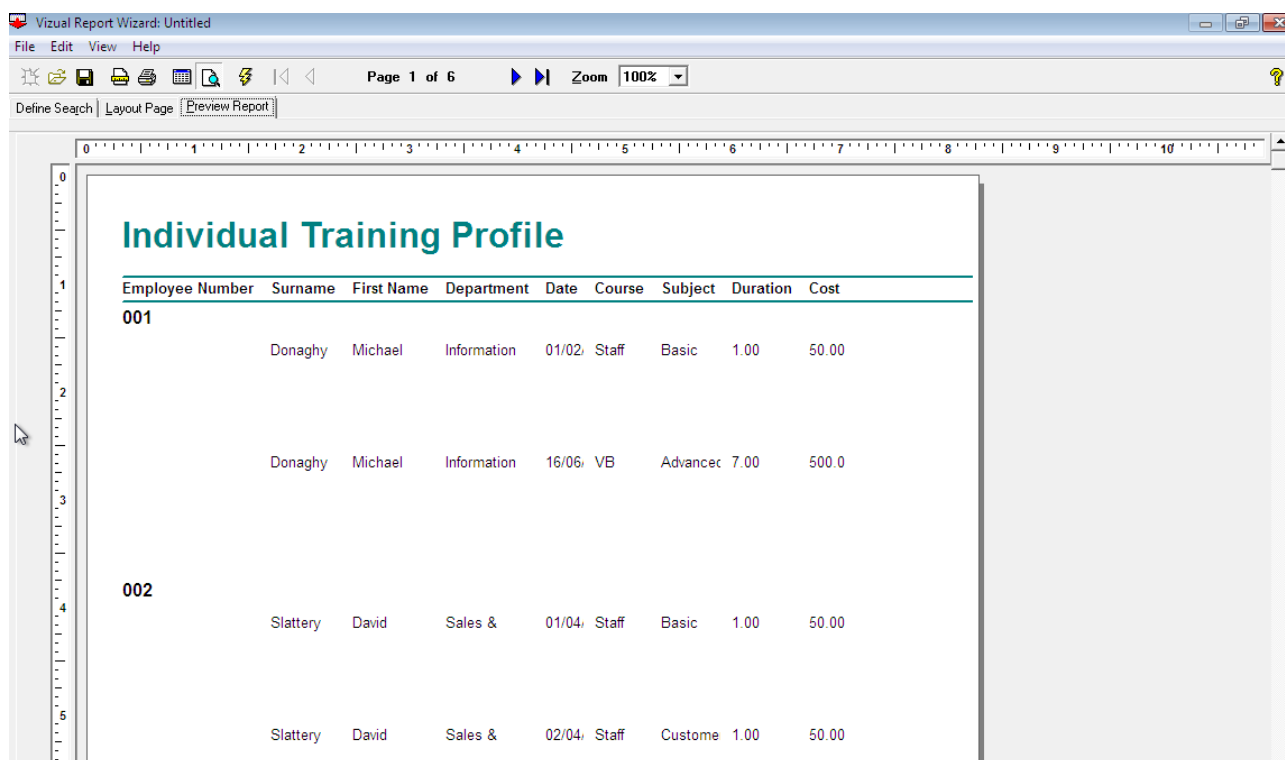
Setting up a filter within the report (to show Active Employees)

We have almost finished creating our report. The final step is to add our filter to show just the Active Employees.

To add the filter:

1. Click on the Define Search Tab
2. In the MASTER table at the top of the screen, locate the STATUS field and double click on it. This will add the Status field to the fields to the FIELD GRID in the bottom half of the screen.
3. Open the Properties dialogue box for the Status field by double clicking on it
4. On the right-hand side of the properties box, you will see a drop-down box. From here choose the IS EQUAL TO filter.
5. Below the drop down are 5 empty boxes. In the first empty box type in the word 'Active' (it is critical that this is spelt correctly whilst using the correct case).
6. Finally, from the SHOW drop down, choose HIDE
7. Click OK
8. Click on the Preview Report tab to view the results

The preview should now show the Report as per the example below:



Preview Report View before any changes are made.

Stage 3 – Designing the Page Layout

Layout Page Overview

Once you have changed the criteria of the data within your report, you will need to change the appearance of the report so that it is suitable for printing. This is all done within the Layout Page tab.

The layout page consists of a toolbar and the main layout of the report where changes can be made to alter the appearance of the report.

This page is split into sections (these will depend on what was selected during the set-up stage in the Report wizard). Each section is divided by a blue line and these can be moved up and down the page by clicking and dragging them.

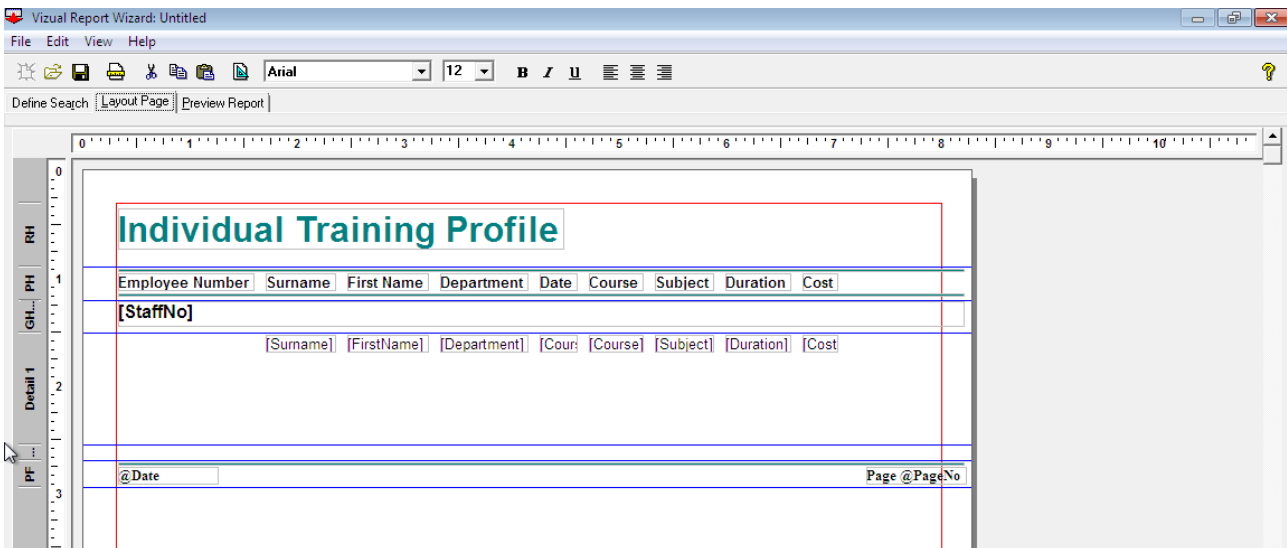
Down the left of the screen are abbreviations for each section:

Abv	Description	Explanation
RH	Report Header	Items in this section only appear at the very top of the report
PH	Page Header	Items in this section appear at the top of every page (Except page 1)
D1	Detail	This is where the bulk of the information is displayed
RF	Report Footer	Items in this section only appear at the very bottom of the report – ideal for grand totals
PF	Page Footer	Items in this section appear at the bottom of every page (Except page 1)

The following sections may also appear on some reports:

Abv	Description	Explanation
GH	Group Header	Used in reports which are grouped by a field in the database (such as Department)
GF	Group Footer	As above, but used to show totals by a field (again, Headcount by department)

When creating a new report, you will always need to change the height of the DETAIL section as this defaults to a much bigger size than is usually required. Simply click on the blue line below the 'Detail 1' section (see below) and drag upwards until it stops, then let go.



Initial Page Layout View

Then click on Preview Report to see the difference.

You will also see in the Layout Page tab that within the sections are a number of boxes, called objects. These objects are basically the chosen fields (displayed with a bracket around it for example, [FIELD]) and labels which are used as headers to show which field is which on the report.

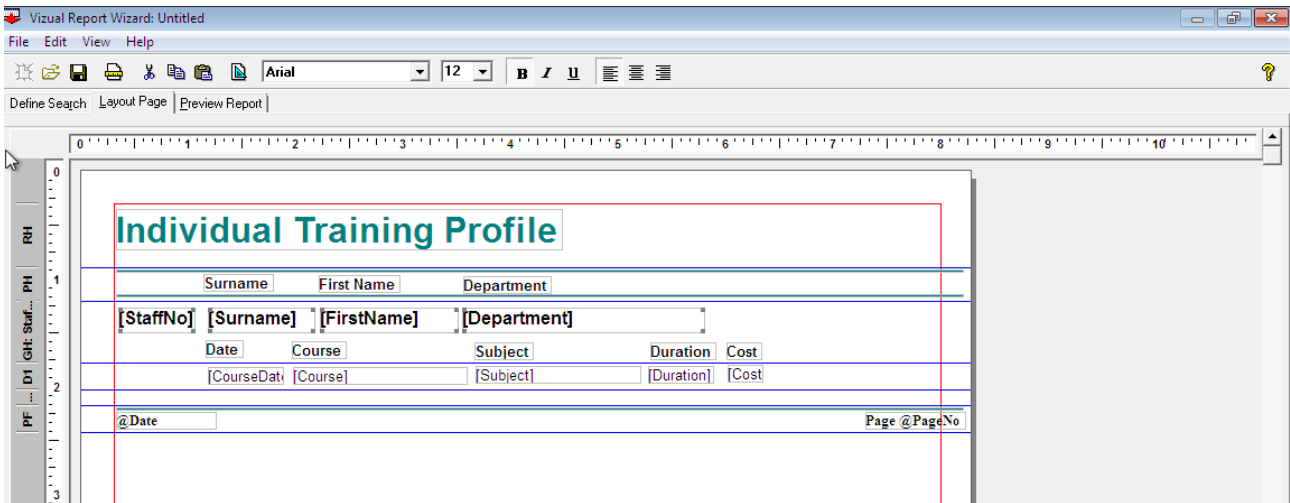
You may find that some objects are not sized correctly and therefore in the Preview Report tab names etc maybe cut off. We can tidy this by:

- To resize an object simply click on it and 8 black dots called 'sizing handles' will appear.
- Click and drag on the relevant sizing handle to resize the object.
- To move an object, simply click in the centre of the object and drag it into position.

To tidy up our report we want to move the Surname, Firstname and Department fields into the Group Header section so they are not repeated for each training record for the employee. You may also want to play around with moving the labels on the report and adjusting the style of the labels and fields to improve how the report looks.

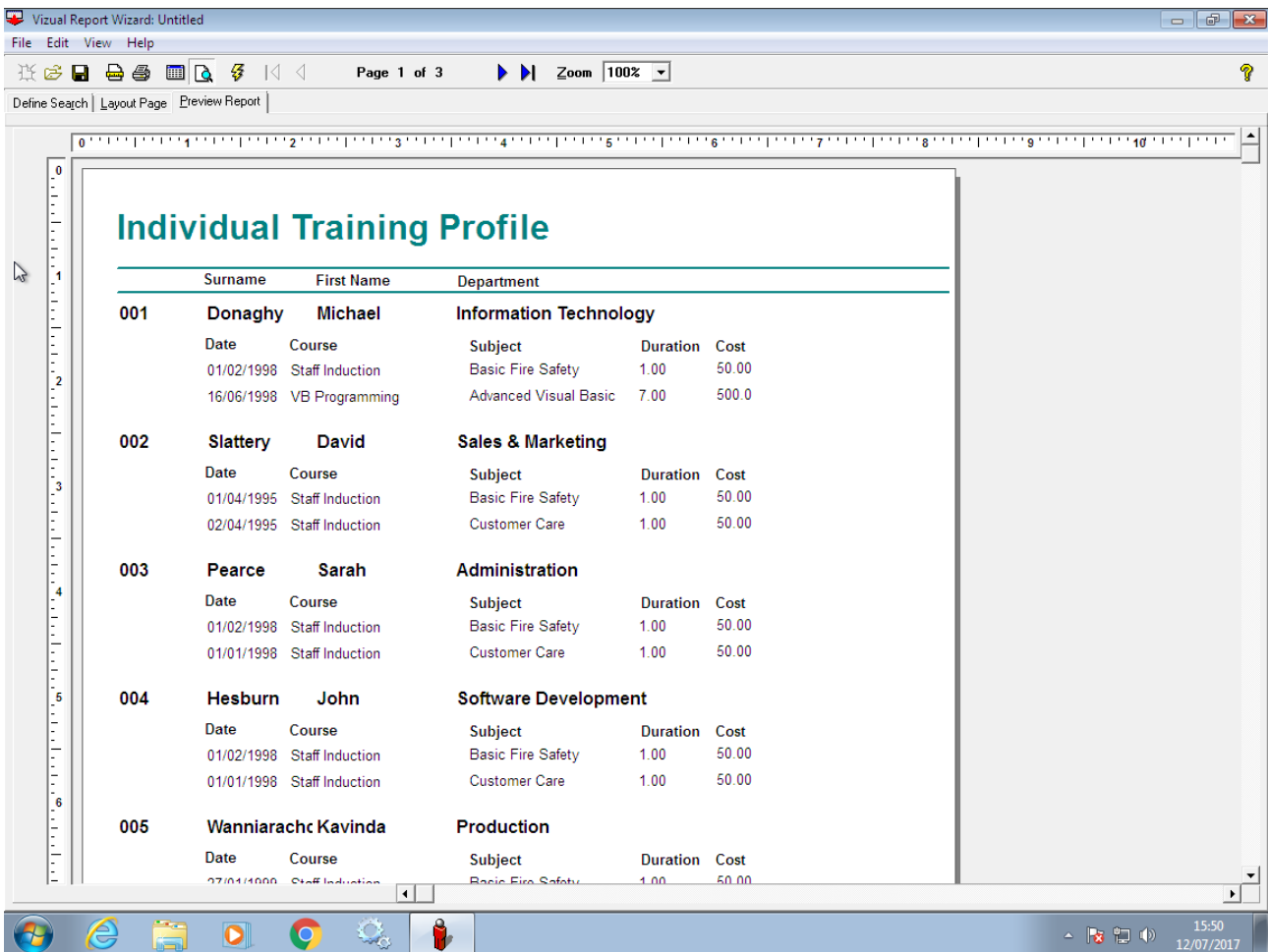
TOP TIP: Don't forget to Preview your report after making each change where possible, this will ensure that if you make a mistake, you spot it early.

In our example, we have set the layout to look like the screen shot below:



Updated Page Layout View

This then shows our report as per the image below:



Updated Report Preview

Using the Page designer to add subtotals.

The Page Designer is a tool whereby we can Add sections (using the Arrange Tab), Place additional objects onto the report (using the PLACE tab) or changing the properties of an object (using the Customise tab).

To activate the Page Designer, click on the 'blue triangle on a page' icon from the toolbar (ensuring you are in the Layout Page view) and immediately click and drag the Page Designer box to the right of your screen (this will save hassle later).

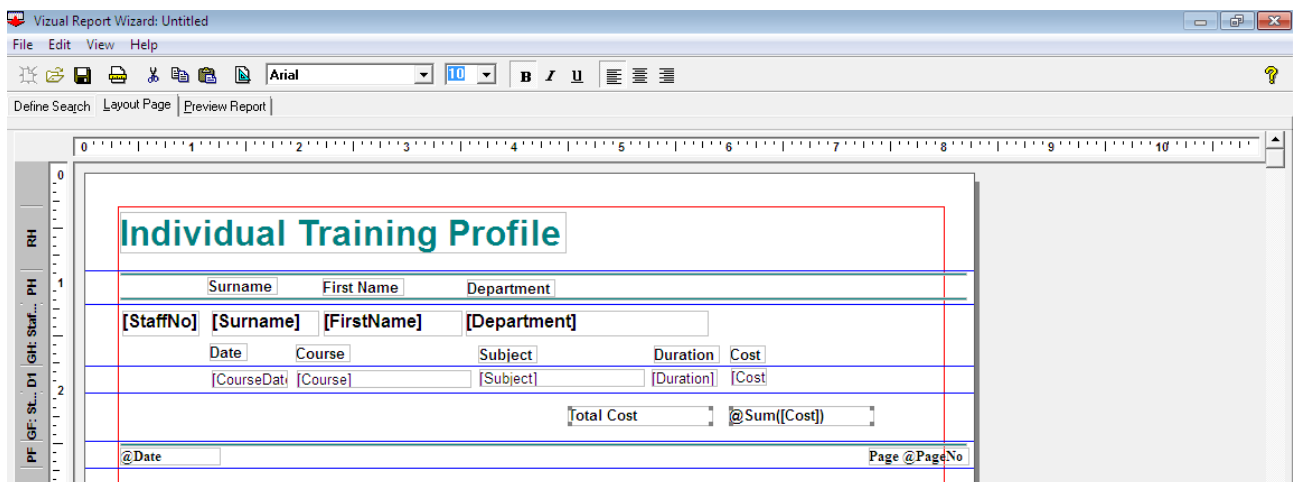
Adding a total cost by employee

Before placing our calculated field onto our report we need to make space in the section it is to appear in. As we are creating a total by Employee we need to increase the size of the Group Footer: Staff Number section by clicking and dragging the blue line. We can then add the total.

To add a grand total for your report in this case add a total headcount:

1. Click on the Layout Page Tab
2. Open the Page designer (the 'blue triangle on a page' icon from the toolbar)
3. Click on the PLACE Tab
4. Click on SUM
5. Click on the Cost Field
6. Click on the Layout Page to add the calculated field to the report, then drag this into position into the Report Footer Section.
7. Click on the Preview Tab to see the results.

NOTE: You may wish to format this new calculated field to make it **bold** and rename the label to say Total Cost by right clicking on it and choosing EDIT CAPTION. See the screen shot below to see what our layout looks like:



Updated Page Layout to show totals

When you have made your changes you can preview the report – as shown below:

Individual Training Profile

	Surname	First Name	Department		
001	Donaghy	Michael	Information Technology		
	Date	Course	Subject	Duration	Cost
	01/02/1998	Staff Induction	Basic Fire Safety	1.00	50.00
	16/06/1998	VB Programming	Advanced Visual Basic	7.00	500.00
			Total Cost		550.00
002	Slattery	David	Sales & Marketing		
	Date	Course	Subject	Duration	Cost
	01/04/1995	Staff Induction	Basic Fire Safety	1.00	50.00
	02/04/1995	Staff Induction	Customer Care	1.00	50.00
			Total Cost		100.00
003	Pearce	Sarah	Administration		
	Date	Course	Subject	Duration	Cost
	01/02/1998	Staff Induction	Basic Fire Safety	1.00	50.00
	01/01/1998	Staff Induction	Customer Care	1.00	50.00
			Total Cost		100.00
004	Hesburn	John	Software Development		
	Date	Course	Subject	Duration	Cost
	01/02/1998	Staff Induction	Basic Fire Safety	1.00	50.00
	01/01/1998	Staff Induction	Customer Care	1.00	50.00

Finished Report with totals

Further information

AgathonHR are one of the last remaining companies in the UK providing services and support for Vizual Personnel Manager.

Whilst we can no longer sell Personnel Manager. we do currently provide the following:

- Upgrades to People Inc. including data migration.
- Discounted annual support packages
- Basic training for new users
- Report Writing Training.
- Consultancy – Data tidying, customisation etc.

Further information can be found on our website <http://vizualpersonnel.co.uk>. If you require any support with Vizual Personnel Manager please call 01242 663974 or email support@vizualpersonnel.co.uk.