Creating a Report with a Graph in Vizual Personnel Director

Personnel Directors built in Report Designer tool allows users to create a wide range of different reports including:

- A Simple List Report (Phone List)
- A Grouped Report (List of Employees by Department)
- A Summary Report (Headcount be Department)

In addition to this it is also possible to create a summary report that also includes a graph. A good example of this would be a report that shows the headcount by department with a Pie Chart.

As with any report, the key to success is the planning or thought process stage which is done before trying to create the report. This process is detailed below, yet the creation of the chart is done at the end, once you have created the rest of the report.

Stage 1 - Designing your report (the thought process)

Summary reports are typically less complicated as they do not require many fields, however we do recommend going through the thought process to determine what you want the report to do and show to make it easier when it comes to creating the report in the Report Designer tool.

With Summary Reports the first and most important step is to make a note of which field you wish to group by, what field will be used to calculate and finally what kind of calculation you would like to use.

NOTE: When Counting the number of employees in a report we use the Employee Number as this is the only guaranteed unique field in Personnel Director and therefore can only be counted once.

In order to create our 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 the number of employees by their Department for Active staff only. We will therefore call this our 'Headcount by Ethnic Origin' report.

2. Choose Screens/Tables

Behind each of the screen you see within Personnel Director 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 just need the **Employee Details** screen.

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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 Director and double check where our data is stored if need be.

3. Choose which Field to group by

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

- Grouped Field = Department
- Calculated Field = Employee Number

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 Calculation

In this example, we want to show the number of employees in each group and therefore need to use the COUNT calculation.

NOTE: If, we wanted to see the total cost of absence by a department for example, we would use the Cost field and a SUM Calculation

NOTE: The Sort Order is automatically set to the Grouped field in Summary Reports and cannot be changed.

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 Director.

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.

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To create a new Summary Report with Graph (Headcount by Department)

1. Within the REPORT LIBRARY, Click on the folder where you want to create the report
2. Right click and choose NEW>NEW REPORT
3. Enter a Name and Description for the report
4. Click FINISH
5. Click on the DATA tab
6. Choose FILE>NEW
7. Click OK
8. Choose the tables you wish to use by double clicking on it (in this case, EMPLOYEES) and click Next
9. Click on the CHOOSE FIELDS option then select the fields you wish to group by in order to make a calculation (in this example, choose Employees.Department) and click Next
10. Click ADD CALCULATIONS
11. Create a Headcount calculation by, double clicking on any text field from the Employee Details screen (i.e. Employee Number).
12. Then choose Count as the Calculation. When you click OK, the calculation will look as follows, Count(*).
13. Click NEXT
14. Select Group Fields will automatically select the fields chosen in step 9.
15. Click Next to the end of the wizard
16. Type in a name for this report in the Description box, then click Finish.
17. This will then show you a preview of the data selected.
18. To preview the data, click on the Preview Data button on the query builder toolbar.

At this point the report is still not complete. We next need to define the Search Criteria

Setting Search Criteria (Filters) using the Data Tab

The Data 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. In this example, we will set up the search criteria so the report only shows Active Employees.

1. Click on the Data Tab
2. Click on the Search button (Magnifying Glass Icon).
3. Choose the field you wish to filter, i.e. Status and double click on it. This will add it to the CRITERIA window in the bottom half of the Query Designer
4. Under OPERATOR you will see an EQUALS '=' sign. To change this, click on it and choose another option from the drop down. We will leave it as EQUALS for this example.
5. In the next box, the VALUE box, Type in the word "Active" (exactly as it appears in the database). You may need to click under the word VALUE to make the input box active.
6. Click OK.

NOTE: Make sure to preview the report data after making any changes

Stage 3 – Designing the Report Layout (Using the Design Tab)

Design Tab 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 Design tab.

A. Firstly we create the report and edit the layout using a Wizard:

1. Click on the design Tab

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2. Select New From File menu
3. Choose Report Wizard
4. Choose fields (these are the fields chosen in the Data section) i.e. Department & Count(*).
5. Next
6. Next
7. Next
8. Next
9. Finish

You should automatically be shown the preview

B. Next we will add the graph

1. In the Design tab, choose SUMMARY from the REPORT menu
2. Click on the DBChart button, then click in the Summary section
3. Right click on the chart and choose EDIT CHART
4. Click on the CHART>SERIES tab and click ADD and choose a PIE Chart
5. Click on the SERIES>DATA SOURCE tab
6. Choose DATA PIPELINE from the drop down menu
7. Choose the Employees_by_Gender option in the dataset drop down (depending on what you called the query)
8. Choose Gender from the Labels drop down
9. Choose Count(*) from the Pie drop down
10. Click Close
11. Click on the PREVIEW tab to view the Chart
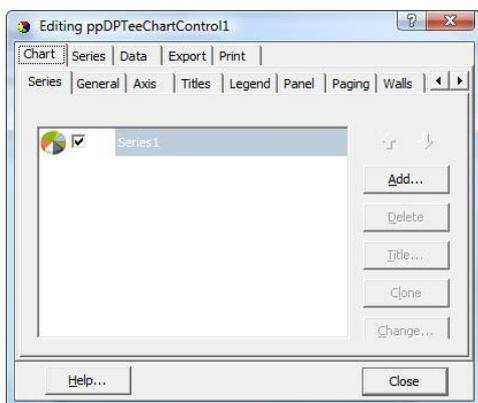
You can further edit the chart properties by opening the design tab and choosing Edit Chart from the right click menu. A selection of these are described below:

1. To change the Chart type (from Bar to Pie)
2. Right click on the Chart and choose EDIT CHART
3. On the series tab, click Change
4. Choose a different Chart style i.e Pie
5. Click OK

To change the Chart Title
1. Right click on the Chart and choose EDIT CHART
2. Click on the TITLES tab
3. Change the contents in the text box within the STYLE
4. Change the position etc by changing the properties within different tabs in the TITLES section
5. Click OK when complete

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Headcount by Department

Department	Headcount
Administration	3
Buying	1
Human Resources	2
Information Technology	2
Production	1
Sales & Marketing	3
Software Development	4
Training	1
Warehouse	3
Total Headcount	**20**

Headcount by Department

- 3 Administration
- 1 Buying
- 2 Human Resources
- 2 Information Technology
- 1 Production
- 3 Sales & Marketing
- 4 Software Development
- 1 Training
- 3 Warehouse
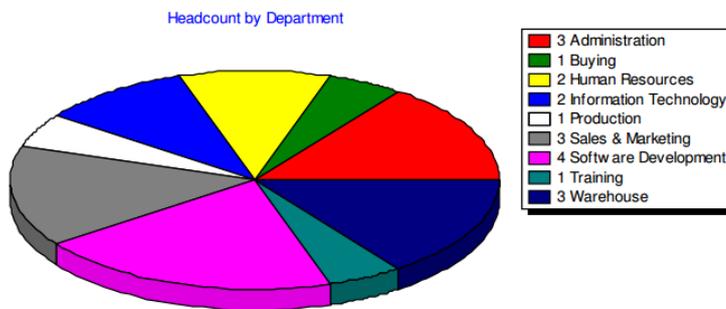
Headcount by Department Report with Graph example.

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.

Further information

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

Whilst we can no longer sell Personnel Director. 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 Director please call 01242 663974 or email support@vizualpersonnel.co.uk.

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