

Creating Reports in Vizual Personnel Manager

Personnel Manager comes with many built in reports, which are available to use as soon as you have entered your employee records on to the database, however you may wish to edit the existing reports or create ones of your own using the built-in report designer tool.

Reports are ideal for analysing data from Personnel Manager as data can be compared in groups showing totals or they can be summarised. These reports can be saved and used over again. Note: Reports are dynamic. Each time the report is run, it will show data as it appears at that time.

Reports can be as complex as required retrieving information from one or more Personnel Manager tables based on complex search criteria.

The key to good reports is obviously the data itself. If your data is untidy, then you won't get the reports you want.

Stage 1 - Designing your report (the thought process)

Some reports can be very complex; therefore, we recommend users break down the report in to simple elements and follow a basic process to allow them to gather all the information needed in order to set up the report before starting it.

The first and most important step is to make a note of what it is you want your report to display. For example, which fields in which order etc.

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 today's example, we will be creating a **simple phone list sorted by Surname, Firstname and only showing Active employees**.

We will call this our 'Staff Phone List' 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 just need the **Employee Details** screen.

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.

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3. Choose Fields to be displayed

Fields are the boxed 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:

- Surname
- First Name
- Department
- Job Title
- Work Telephone
- Mobile Telephone

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. Set the Sort order

The next step is to determine what order you want your list to be in. Generally, when listing employees, most people choose to sort by **Surname**, then by **Firstname** as is the case in this example.

By sorting by the Department field in our example report, the system will effectively group people by the department because we are sorting by this field, we can then sort by Surname, Firstname if need be.

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 basic report (Staff Phone List)

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. Click Next
8. Choose the fields identified in Stage 1 (Surname, Firstname, Department, Job Title, Work Telephone and Mobile Phone) by double clicking on each one in the left-hand panel
9. Click Next
10. Click Next 6 times
11. Finish
12. A new window will open showing the Layout Page view. Click Maximise
13. To view the report, click the Preview Report tab
14. To SAVE and EXIT the report simply close the window and click YES to save.

Once we have completed this step, we will have a report that uses the chosen fields but shows ALL employees in our database and in no particular order. We must next edit the report to make the final changes.

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 table (the system name for Employee Details).

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.

Changing the Sort Order to Surname, Firstname

1. Click on the Define Search Tab
2. In the bottom half of the screen find the word FIELD down the left-hand side of the 'field grid'.
3. Then move the mouse pointer to the right until you find the Surname field.
4. Double click
5. This will open the Properties dialogue box which will enable you to change the properties for the Surname Field (NOTE: If you double click on the HEADER row, you may not have opened the correct field Properties to make sure, check that the properties dialogue box is called EDIT MASTER.SURNAME).
6. Change the SORT property from NONE to A-Z by clicking on the dropdown list and selecting the A-Z option
7. Click OK and the SORT option on the Report window should now show A-Z for the Surname field.
8. Repeat this process for the Firstname field
9. Click on the preview report tab to view the results

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. Click OK
7. Click on the Preview Report tab to view the results

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

Phone List				
Surname	First Name	Department	Job Title	Work Telephone
Barker	Jonathon	Sales & Marketing	Admin Assistant	0121 654345
Davidson	George	Software	Computer	0171 895522
Dibbens	Stella	Administration	Admin Assistant	0171 223398
Difazio	Jane	Administration	Secretary	0122 656565
Donaghy	Michael	Information	IT Manager	01934 654542
Hancorn	Michael	Training	Training Manager	01934 654345
Hesburn	John	Software	Computer	01934 658986

You may be required to make changes to the layout of the report. This involves dragging the boxes on the Layout Page Tab to your desired position and using the Page Designer tool. If you require assistance with this please contact us.

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 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.