

Generate Report

Since there are several different reports to be selected, this can only be a general guide.

- Open Personal > **Reports**
- **Select** the appropriate report from the now opened list
- **Select** e.g. "Personnel lists".
- It opens an almost empty page
- Next to Select report there is a **selection box**
- By clicking on the arrow of this selection window, all options are displayed.
- **Select** e.g. "Phone list".
- Some **report generation parameters** are displayed that vary from report to report.
- Common to all reports is the **reporting date** on which this report is accurate.
- Also the **output format** can be chosen (pdf, print, xls)
- A certain name can be entered into the text field of the "**Search**".
- A check mark for "**Consider selection in search**" causes the system to search for this name in the selected groups and organizational units.
 - With the text field Search it is possible to filter for a specific person and with the check mark at "Consider selection in search" an AND link to the departments below can be established.
 - Example: If "Florian" is entered in the search field without activating the check mark, all persons with the name Florian are displayed. If the checkmark is also set and one or more groups below are selected, the display is restricted to those employees who meet both criteria.
- A check mark for "**Determine persons from groups on reference date**" causes the selected date to be used for report generation instead of the current date.
- A check mark at "**Group**" causes the report to be grouped according to the parameters (e.g. by organizational unit or date), otherwise it is usually sorted alphabetically.
- Below the parameters there is a list of all **selectable groups** and organizational units (**at least 1** is required for report generation).
- By clicking on "**Create report**" the report is created according to the selected parameters and displayed in the right half of the screen.