Creating a Report

Since there are several different reports to choose from, this can only be a general guide

- Open Personnel > Reports
- select the appropriate report from the list that has now opened
- select, e.g., "Personnel Lists"
- an almost empty page opens
- next to Select report there is a selection window
- clicking the arrow of this selection window displays all options
- select, e.g., "Phone List"
- a few parameters for report creation are displayed, which differ from report to report
- common to all reports is the **reference date** on which this report is valid
- the **output format** can also be selected (pdf, print, xls)
- in the "**Search**" text field, a specific name can be entered
- a check mark at "**Consider selection in search**" causes this name to be searched for in the selected groups and organizational units
    - The Search text field can be used to filter specifically for a particular person, and the check mark at "Consider selection in search" creates an AND link with the departments that can be selected below.
    - *Example:* If "Florian" is entered in the search field without activating the check mark, all persons named Florian are displayed. If the check mark is additionally set and one or more groups are selected below, the display is limited to those employees to whom both criteria apply.
- a check mark at "**Determine persons from groups as of the reference date**" causes the selected date to be used for report creation 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 creation)
- clicking "**Create report**" creates the report according to the selected parameters and displays it in the right half of the screen