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Management Solutions

A Quick Guide to Report Wizard
in TMS Version 6

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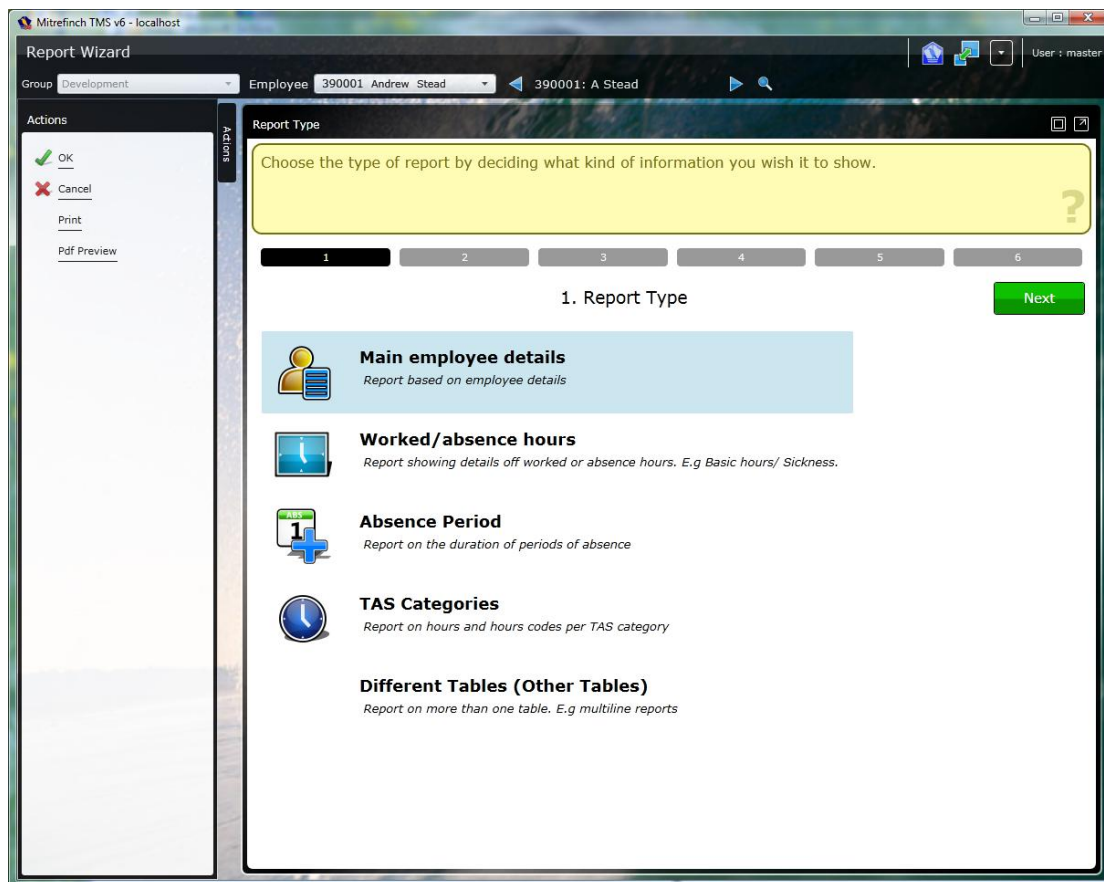
1 The purpose of this guide

TMS now has a new and much simpler report writing engine. The Report Wizard was implemented on the web version of the product.

The newly designed, user-friendly version of the WinTMS Report Generator enables the user to get started with reporting without having to define a large number of various preferences. This guide has been prepared to explain this helpful and time-saving functionality.

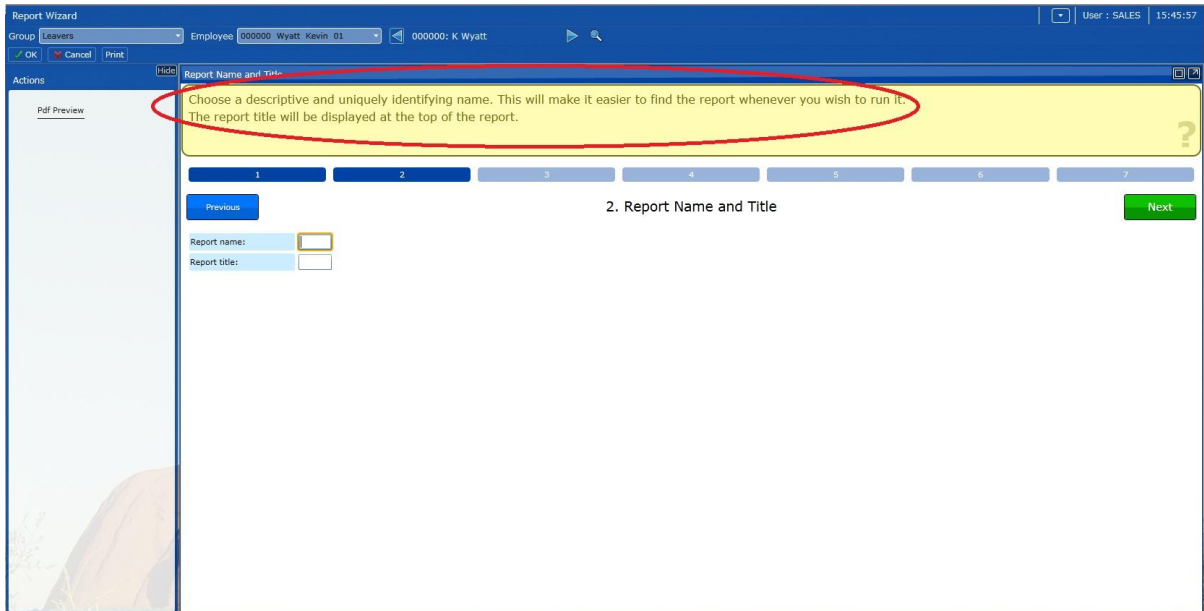
2 Location

The Report Wizard is available from the Reports menu on the main dashboard. It is disabled by default and can be enabled via the Maintain Users system option, thus making it only available to supervisors:



3 Functionality

The Report Wizard will guide you step by step, giving you instructions on how to prepare your own version of the report.



4 Additional reports

Additional report types have been added in the web report wizard:

- a) **Absence period:** allows you to report on periods of absence with associated codes, dates and duration.
- b) **Time Allocation System categories:** allows you to report on time allocation data.
- c) **Different tables:** you can create more complex employee multiline tables.

5 Pdf preview

The user is able to use the Pdf preview link to the left to view the current output of the report allowing him to adjust the settings at any stage of preparation before saving the report.

6 Right click capability

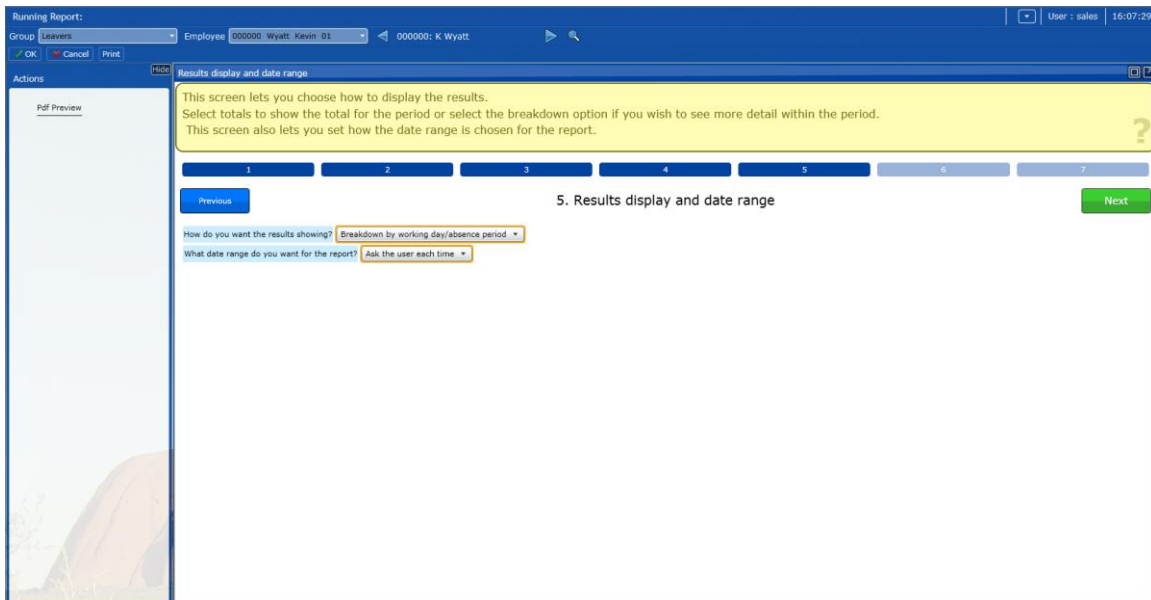
This option has drastically reduced the size of the on screen menus and in some cases eliminated them entirely, allowing for a more clutter-free look.

7 Reports embedded in letters

You can now embed reports in letters in TMS. For example, you could embed a report showing an employee's absences into a disciplinary letter.

8 Customise your reports

You can customise your reports. You can choose the order of your fields – decide in which order they will appear on your report, changing headings and fields names.



The screenshot shows the 'Running Report' window for 'Employees' with employee '000000 Wyatt Kevin G1'. The 'Results display and date range' step is active, showing a yellow instruction box: 'This screen lets you choose how to display the results. Select totals to show the total for the period or select the breakdown option if you wish to see more detail within the period. This screen also lets you set how the date range is chosen for the report.' Below this are two dropdown menus: 'How do you want the results showing?' set to 'Breakdown by working day/absence period' and 'What date range do you want for the report?' set to 'Ask the user each time'. Navigation buttons for 'Previous' and 'Next' are visible, along with a progress bar at the top.

9 Compatible with Report Generator

The reports created in the Reports Wizard can be amended within Windows TMS by using the Report Generator.



If you require more information, or you would like to book a training day,
contact your account manager on 0845 619 0070.

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