



Teessen Consulting

2015

TC CommSplit: how to create a standard report

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05/2015



How to create a standard report

A standard report can be created which can then be generated on a specific screen (in place report) at any time.

On the Navigation bar select Reports > Report V2.

Create a New report. The Report Wizard will take you through a process similar to the Analysis tool:

The 'Report Wizard' dialog box is shown. It has a title bar 'Report Wizard' and a background image of a document with a pen. The text inside says: 'To create a new report, please enter a name in the field below and select the primary data type of the report from the list.'

Fields:

- Display Name: Client data
- Data Type: Person (dropdown menu)
- Report Type: Standard (dropdown menu)

Buttons at the bottom: Cancel, < Back, Next >, Finish.

Select the fields you want to display in the report:

The 'Report Wizard' dialog box is shown. It has a title bar 'Report Wizard' and a background image of a document with a pen. The text inside says: 'Choose columns to display in your report' and 'Your report can display any of the columns available in the dataset.'

Which columns do you want to display in your report?

Available fields:

- Additional Contact Number
- Additional Email
- Age
- App Settings
- Call Name
- Cell Number
- Change Indicator
- Client Number
- Company
- Consultant
- Contact Type

Fields to display in a report:

Buttons between the lists: >, >>, <, <<

Buttons at the bottom: Cancel, < Back, Next >, Finish.



You can now add a level to your report:

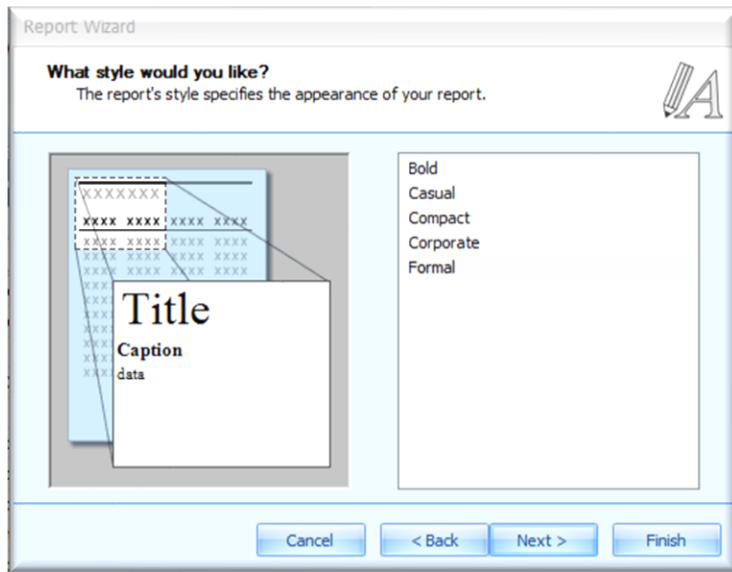
The 'Report Wizard' dialog box is shown at the 'Do you want to add any grouping levels?' step. It includes a list of fields on the left: Displayname, IDNumber, Employer, Email, and Cell Number. A 'Group' box on the right contains the text 'Displayname, IDNumber, Employer, Email, Cell Number'. Navigation buttons at the bottom include 'Cancel', '< Back', 'Next >', and 'Finish'.

Select the layout of your report:

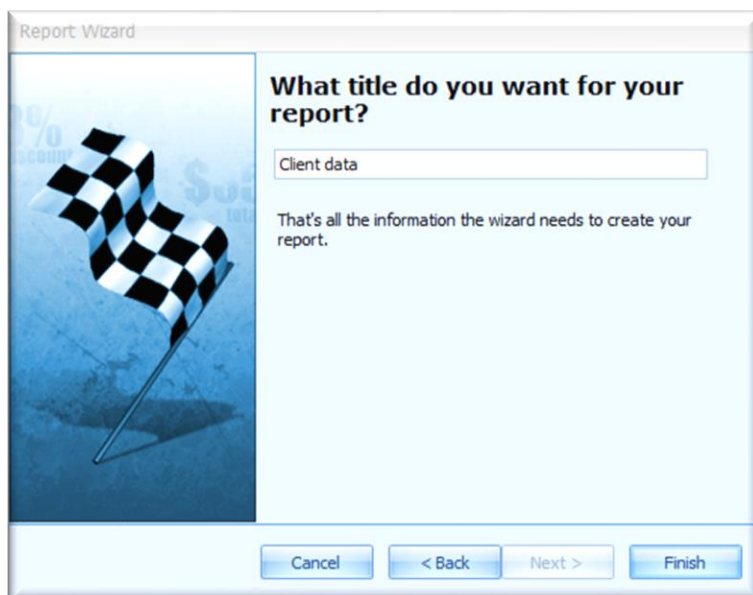
The 'Report Wizard' dialog box is shown at the 'How would you like to lay out your report?' step. It features a preview of a report layout on the left, a 'Layout' section with radio buttons for 'Stepped', 'Outline 1', 'Outline 2', 'Align Left 1' (selected), and 'Align Left 2', and an 'Orientation' section with radio buttons for 'Portrait' and 'Landscape' (selected). A checkbox for 'Adjust the field width so all fields fit on page' is checked. Navigation buttons at the bottom include 'Cancel', '< Back', 'Next >', and 'Finish'.



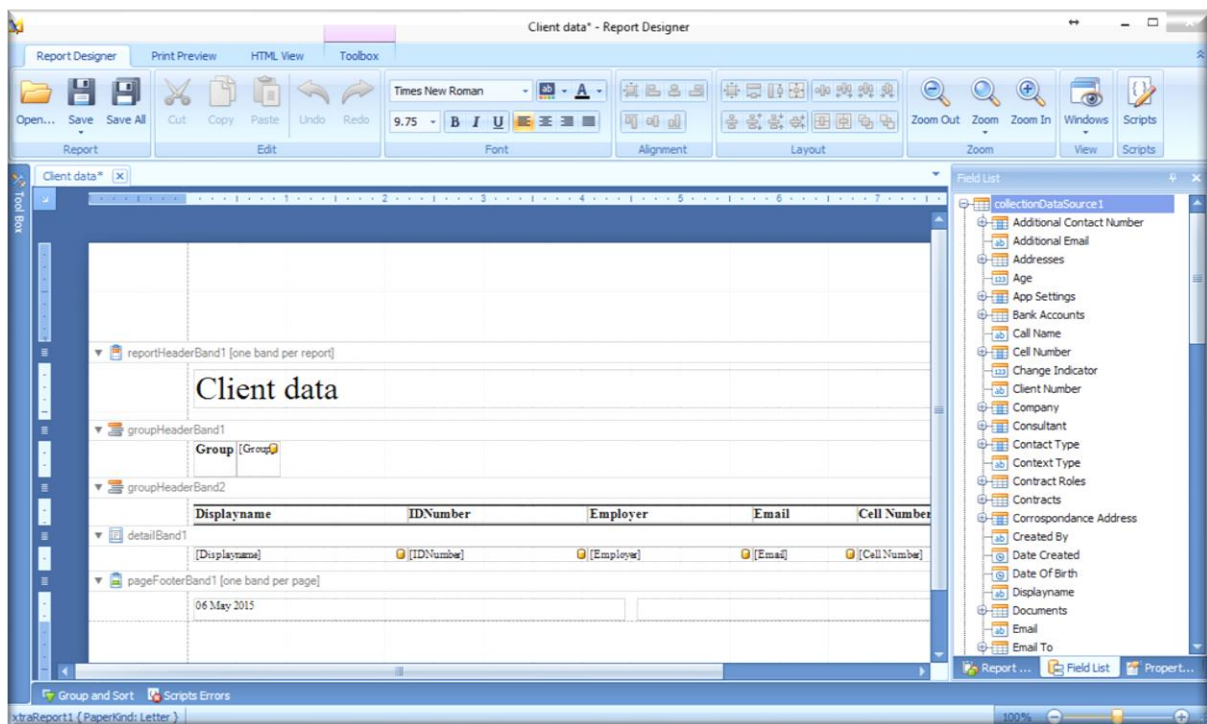
Select the style you prefer for your report:



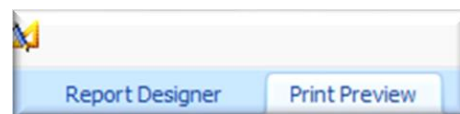
Create a heading for your report:



The report is now generated with the criteria selected in the wizard.



You are now able to add more detail to your report i.e. Logo, colour coding etc.

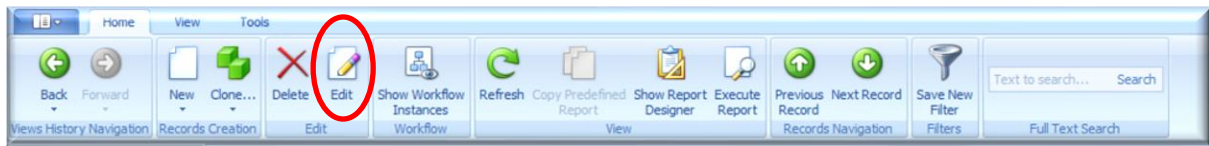


To view your final report click on Print Preview

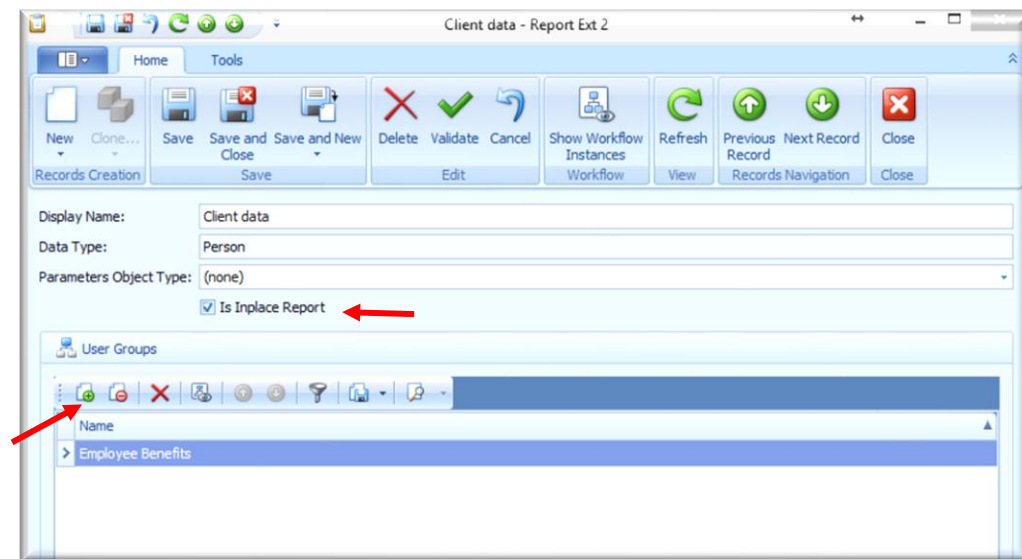
Client data				
Group Test Group				
Displayname	IDNumber	Employer	Email	Cell Number
de Jager Arno (A)				
Group Employ Benefit				
Displayname	IDNumber	Employer	Email	Cell Number
CLARK R (R)	5601145075081	Profert (Pty) Ltd		
DELLIS S (S)	6406195116085	Profert (Pty) Ltd		
PETTIT SHEENA (SA)	7406030188082	Travel with Flair		
GALLON R (R)	7005255017081	Profert (Pty) Ltd		
POSWA LUMKA (L)	7709290933083	Travel with Flair		
DE WET JH (JH)	6109265050081	Profert (Pty) Ltd		
MAKGATLE DUDUZILE (D)	8004030340081	Travel with Flair		
HI OMGWANE M (A)	6410184787088	Profert (Pty) Ltd		



To make this report available as an In Place report, i.e. report will be available on screen as selected on data type, choose the edit icon on the toolbar:



Mark the report as Is Inplace Report and link the relevant Group to which this report applies:

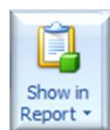


Restart the system for the changes to take effect.

You will now be able to generate this report directly from the Person screen on Contact Management.

Highlight all the records you want to display in the report and select the report from the

Show in Report icon on the toolbar





Person - TC.CommSplit

Navigation: Drag a column header here to group by that column

Displayname	Client N...	Referen...	IDNumber	Work N...	Home N...	Cell Nu...	Fax Nu...	Email	Gender	Date Of...	Language	Ope...	Consultant	Emp...
ACKERMAN ANNELESE (A)	1647496		911205...			277951...			Female	1991-12...	English	0	Bjmer ...	Tran
ADAMS SJ (SJ)	Cat1 Prof1		730802...						Male	1973-08...	English	0	Bjmer ...	Pro
ALLAH LINDA (L)	2122885		840511...			277847...			Female	1984-05...	English	0	Bjmer ...	Tran
ASIA DOROTHY (DIA)	3083183		640808...			277997...			Female	1964-08...	English	0	Bjmer ...	Tran
BADENHORST JE (JE)	Cat1 Prof2		790709...						Male	1979-07...	English	0	Bjmer ...	Pro
BADUZA YOLANDA (Y)	3222329		880101...		079783...	079183...		amane...	Female	1988-01...	English	0	Bjmer ...	Tran
BALA VUYOKAZI (V)	1396743		811130...				278675...	TWF705...	Female	1981-11...	English	0	Bjmer ...	Tran
BALANDA PUMLA (PP)	3260657		750929...			083999...		pumla.d...	Female	1975-09...	English	0	Bjmer ...	Tran
BALOYI NKHENSANI (NM)	1464189		821030...						Female	1982-10...	English	0	Bjmer ...	Tran
BARNARD G (G)	Cat1 Prof3		541022...						Male	1954-10...	English	0	Bjmer ...	Pro
BARNARD JAQUELINE (J)	3151956		870315...			082811...		jackie15...	Female	1987-03...	English	0	Bjmer ...	Tran
BARNES R (R)	Cat1 Prof4		540123...						Male	1954-01...	English	0	Bjmer ...	Pro
BECKERLING A (A)	620109...		620109...						Male	1962-01...	English	0	Bjmer ...	Pro
BESTER JF (JF)	Cat1 Prof6		840301...						Male	1984-03...	English	0	Bjmer ...	Pro

Preview

Client data

Group: Employ Basic

Displayname	IDNumber	Employer	Email	Cell Number
BALANDA PUMLA (PP)	750929089	Travel with Flaw	pumla.dial@aboo.co	083999308
ADAMS SJ (SJ)	730802528080	Profert (Pty) Ltd		
BADENHORST JE (JE)	7907090026088	Profert (Pty) Ltd		
BARNARD G (G)	541022508080	Profert (Pty) Ltd		
BALA VUYOKAZI (V)	811130079083	Travel with Flaw	TWF705@TWF.COZ	
BARNARD JAQUELINE (J)	8703150098086	Travel with Flaw	jackie1502@gmail.co	0828114157
ALLAH LINDA (L)	8405110970087	Travel with Flaw		2778478578
BESTER W (W)	7710135092085	Profert (Pty) Ltd		
ACKERMAN ANNELESE (A)	9112050048085	Travel with Flaw		2779510884
BEZUIDENHOUT HF (HF)	5803055008082	Profert (Pty) Ltd		
BECKERLING A (A)	6201095097083	Profert (Pty) Ltd		
BARNES R (R)	5401235102089	Profert (Pty) Ltd		
BALOYI NKHENSANI (NM)	8210300453088	Travel with Flaw		

You are now able to print, export or email this report in various formats as per the dropdown menus:

