

Training guide:

Reports and Exports



For more information about North Time Pro products, version updates, datasheets and reports, please refer to the North Time Pro website:

www.ntdltd.com

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North Time Pro

www.ntdltd.com
+44 (0) 2892 604000



A series of horizontal lines spanning the width of the page, intended for writing notes.

Contents

Course

Duration

tw21/op/rep001

Approximately 30 minutes

An introduction to North Time Pro reports

Which reports are right for your company?...

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m/08/120	Setting the report properties
m/08/130	Running a report
m/08/140	Making a report a favourite

tw21/op/exp001

Approximately 30 minutes

An introduction to North Time Pro exports

Which exports are right for your company?...

m/08/201	Understanding exports
m/08/210	Selecting an export template
m/08/220	Setting the export properties
m/08/230	Running an export
m/08/240	Making an export a favourite

All information pertaining to any personnel record within this document is obtained from a demonstration database and are not details of any individual.



Module:

m/08/101

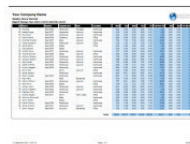
Understanding North Time Pro reports

The North Time Pro application now includes over 190 reports developed using Business Objects (SAP®). The reports are the culmination of 22 years specialising in the workforce management solution business sector.

All the available reports include examples to assist the user in determining which is suitable for the requirements. Once selected, the report properties can be modified to include, for example, specific date ranges and certain groups of employees.

The reports are divided into seven major groups;

General



Personnel

Absence Management



Attendance

Access control

Roll-Call

Job Costing



It is possible for the North Time Pro team to develop customised or bespoke reports for your company. Please contact North Time Pro on +44 (0) 2892 604000 to discuss your exact requirements.

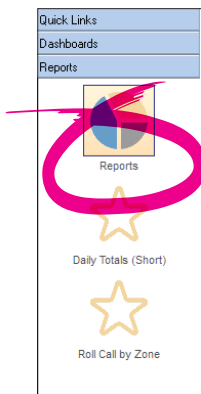


Module:

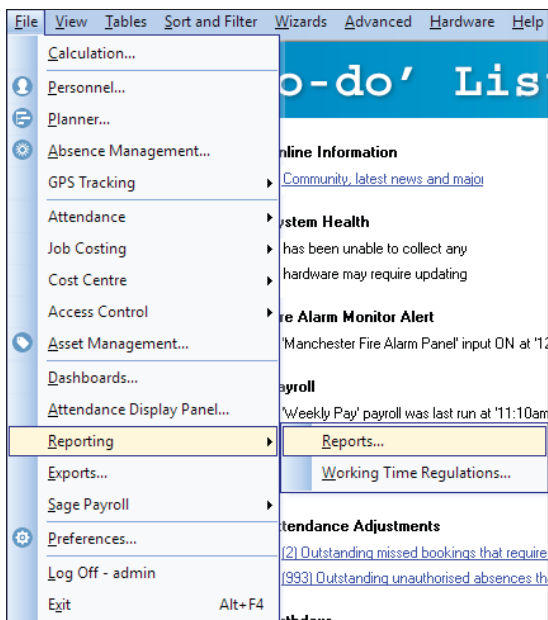
m/08/110

Selecting a report template

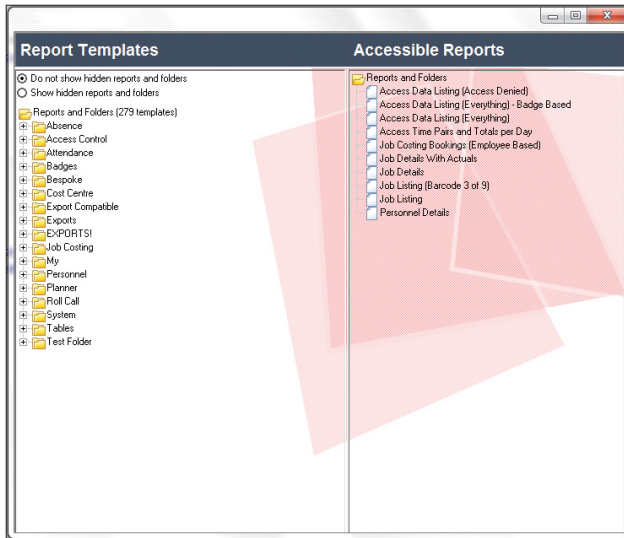
- To access the North Time Pro reports, select the Report Quick link,



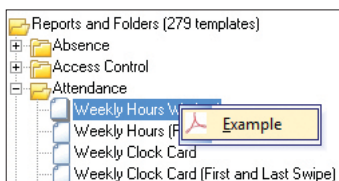
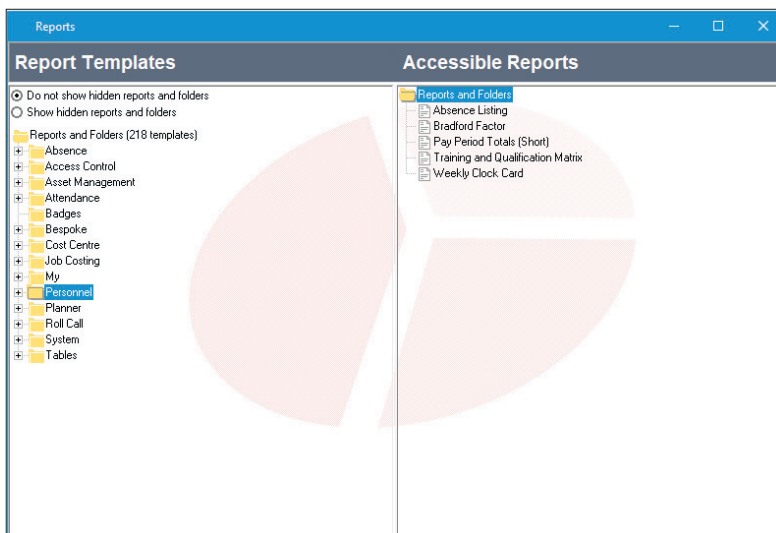
or, select File, then Reporting and click on Reports...



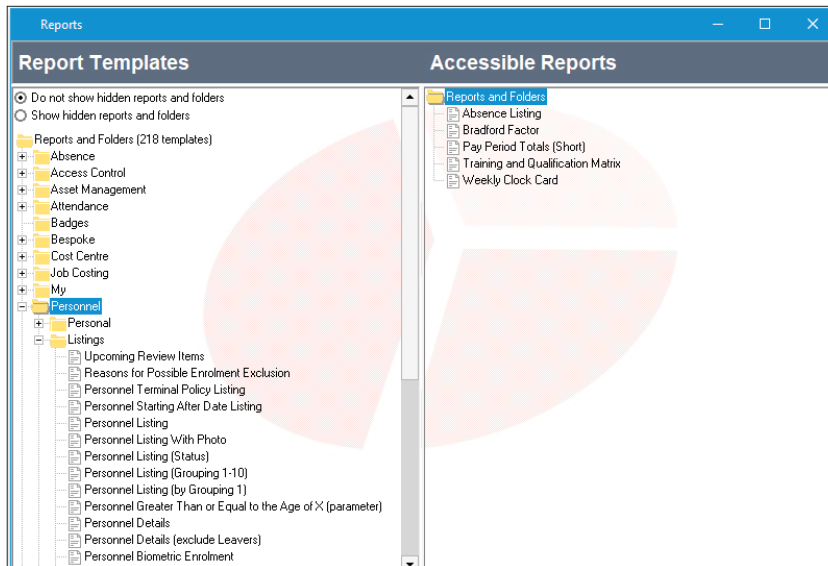
- The Reports screen is divided into two sections. On the left are all the available Report Templates. On the right are the Accessible Reports previously setup by you.



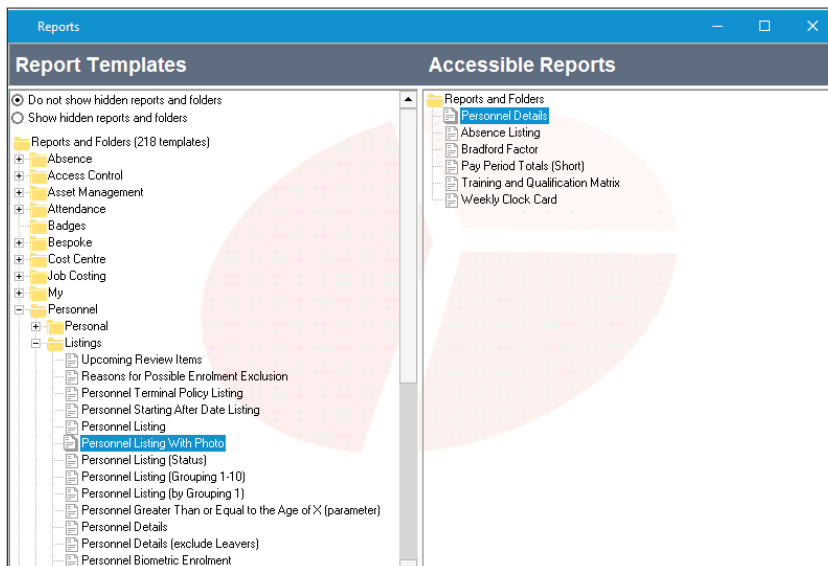
- Double-click on one of the Report Template report folders and all its reports become visible. Moving the mouse over each report displays a thumbnail report. By <Right-clicking> on a report, it is possible to display a full-screen version of the report.



- When you have identified a suitable report, drag the report to the right side of the screen and drop onto Reports and Folders beneath the Accessible Reports header



- A copy of the report will then appear within Reports and Folders.



- You have now successfully selected a North Time Pro report template.



Module:

m/08/120

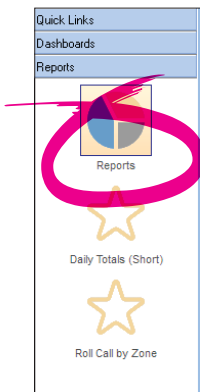
Setting the report properties



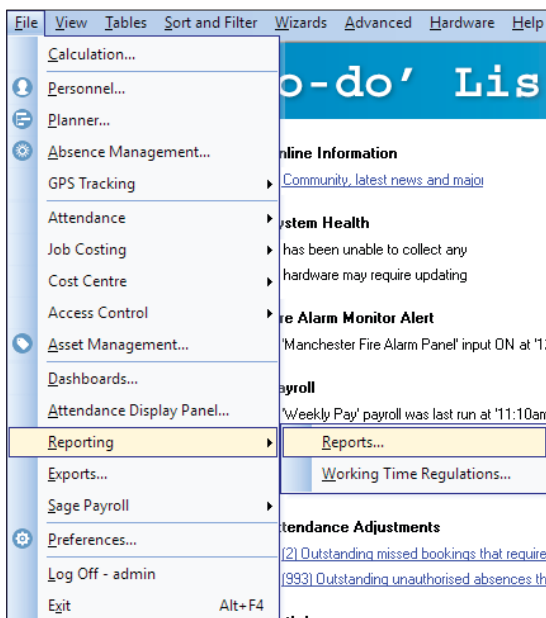
Report properties are generally different on each report.

This module shows the user how to modify report properties. Once the user understands the principles behind this technique, experimenting with the properties of new reports becomes less challenging!

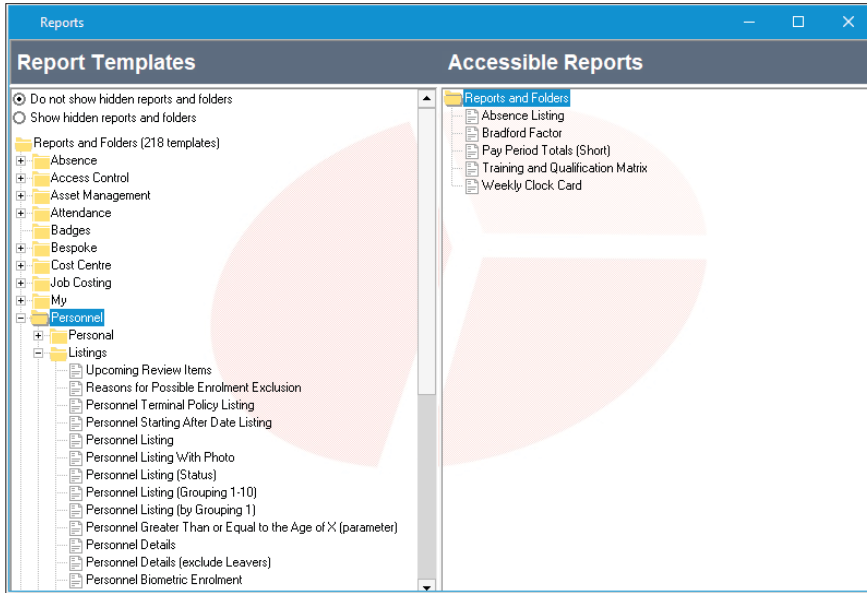
1. Select the Report Quick link



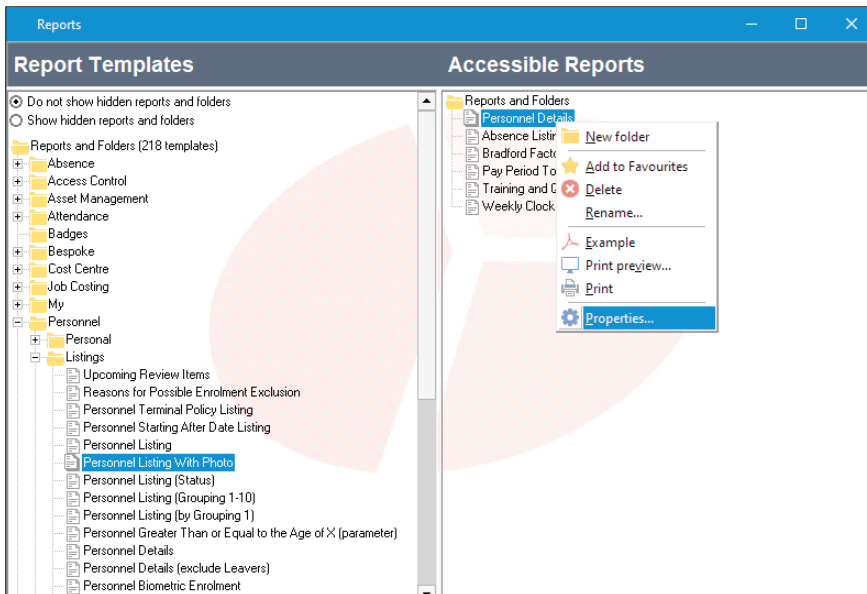
or, select File, then Reporting and click on Reports...



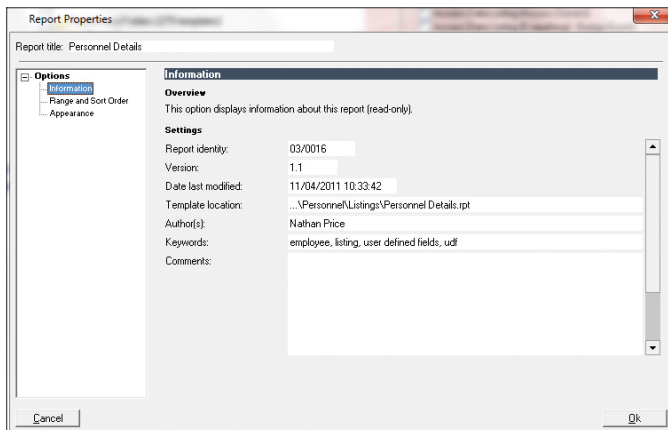
2. The Accessible Reports appear on the right side of the report screen.



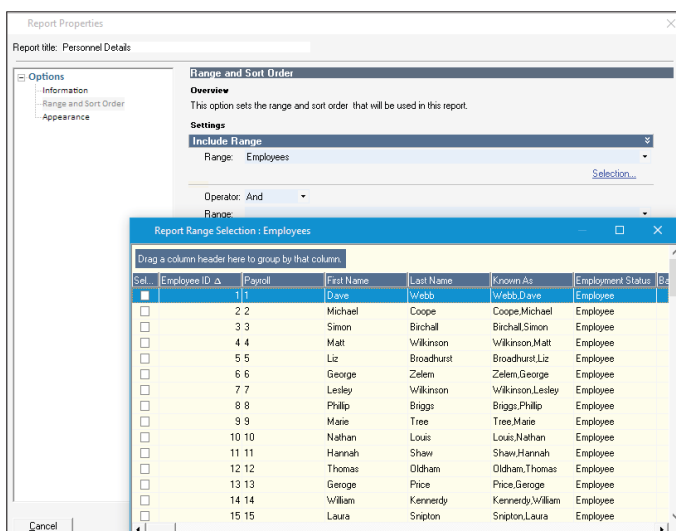
3. <Right-click> on the report and select Properties...



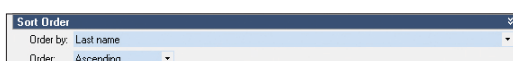
4. Selecting Information displays useful details such as version, date modified, author and comments. These fields do not affect the ranges, sort order or appearance of a report – they are used for support purposes only.



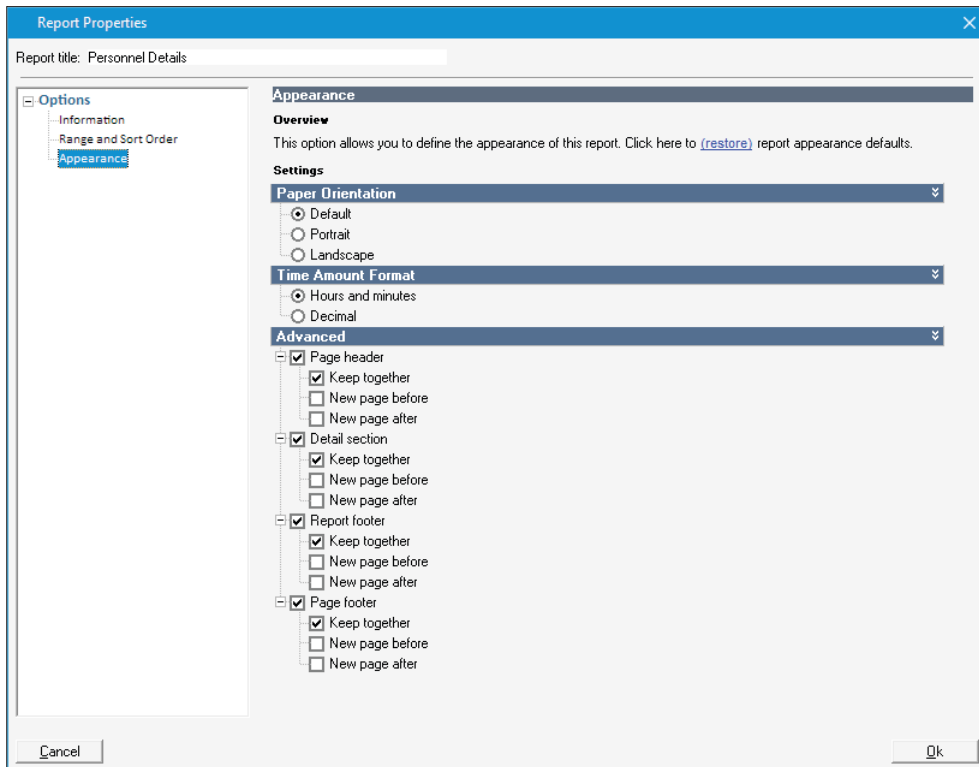
5. Selecting Range and Sort Order enables the user to specify date ranges and the employees to include in the report.



The Sort Order determines how the ranges are grouped together.



6. Selecting Appearance enables the user to personalise the report even further:
 - a The user can specify Portrait or landscape .
 - b On reports that display a time amount total, it is possible to specify whether the total is in decimal (hh.mm) or hours and minutes (hh:mm).
 - c It is often possible to exclude certain sections of a report and to eliminate page breaks. It is generally recommended that the user keeps the defaults specified by the report author.



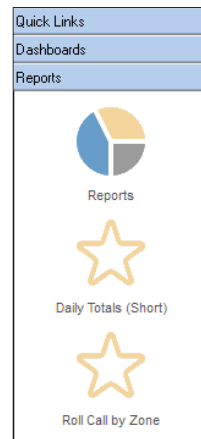
7. Finally, click<OK> to save the modified Report Properties.

Module:

m/08/130

Running a report

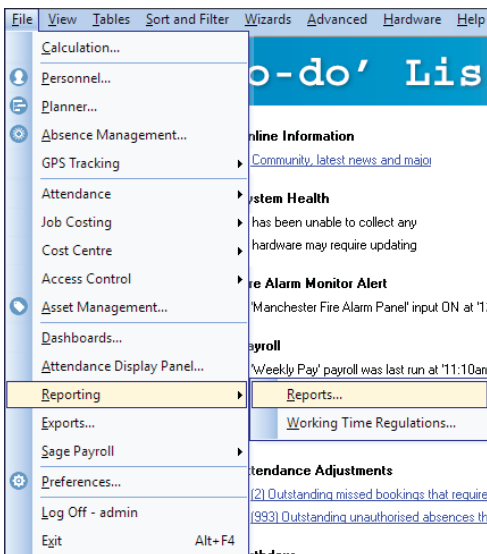
1. If the report is a favourite, select the Favourite Report Quick Links and <Double-click> the desired report.



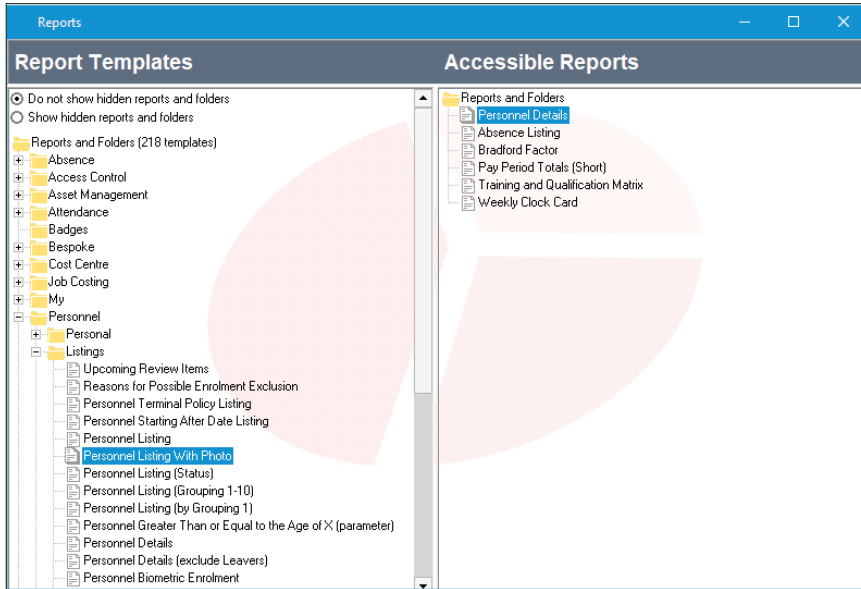
2. If the report is not a favourite, select the Report Quick link:



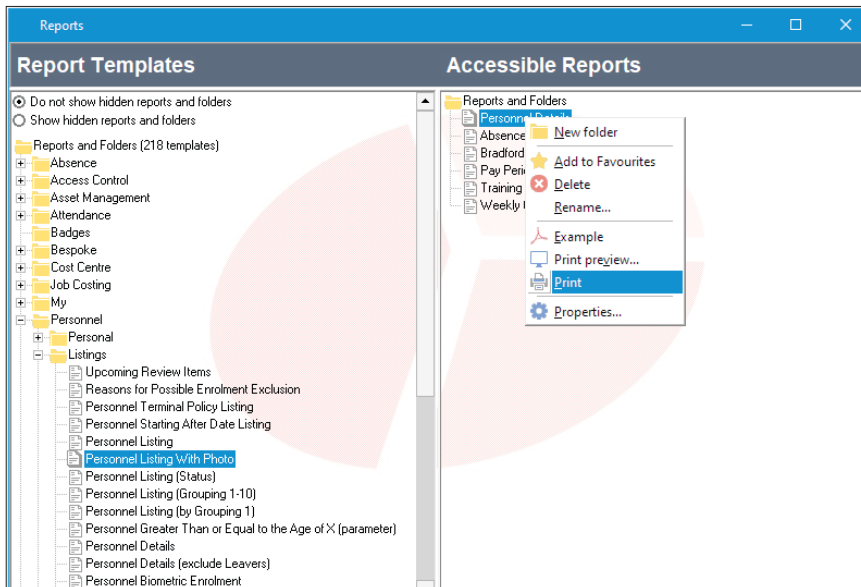
or, select File, then Reporting and click on Reports...



3. The Accessible Reports appear on the right side of the report screen.



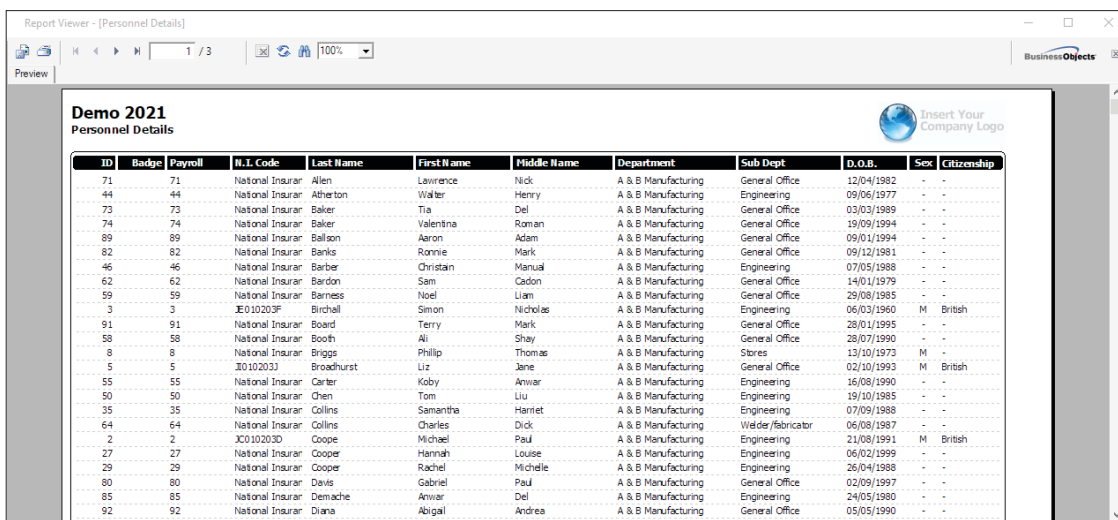
4. <Double-click> the report to display the report on the screen or <Right-click> and select Print to send the report to your default printer.



- Next, the following message will appear at the top of the Report window. If the report has a lot of data to process, This step may take several minutes. Please be patient!

Report Viewer - [Personnel Details], loading please be patient...

- If you select to print the report, the report will sent to your default printer. If you chose to display the report, the report will appear in your default report viewer window:



ID	Badge	Payroll	N.I. Code	Last Name	First Name	Middle Name	Department	Sub Dept	D.O.B.	Sex	Citizenship
71	71		National Insurar	Allen	Lawrence	Nick	A & B Manufacturing	General Office	12/04/1982	-	-
44	44		National Insurar	Atherton	Walter	Henry	A & B Manufacturing	Engineering	09/06/1977	-	-
73	73		National Insurar	Baker	Tia	Del	A & B Manufacturing	General Office	03/03/1989	-	-
74	74		National Insurar	Baker	Valentina	Roman	A & B Manufacturing	General Office	19/09/1994	-	-
89	89		National Insurar	Ballson	Aaron	Adam	A & B Manufacturing	General Office	09/01/1994	-	-
82	82		National Insurar	Banks	Ronnie	Mark	A & B Manufacturing	General Office	09/12/1981	-	-
46	46		National Insurar	Barber	Christian	Manuel	A & B Manufacturing	Engineering	07/05/1988	-	-
62	62		National Insurar	Bardon	Sam	Gadon	A & B Manufacturing	General Office	14/01/1979	-	-
59	59		National Insurar	Barness	Noel	Liam	A & B Manufacturing	General Office	29/08/1985	-	-
3	3		JO19203F	Birchall	Simon	Nicholas	A & B Manufacturing	Engineering	06/03/1960	M	British
91	91		National Insurar	Boord	Terry	Mark	A & B Manufacturing	General Office	28/01/1995	-	-
58	58		National Insurar	Booth	Ali	Shay	A & B Manufacturing	General Office	28/07/1990	-	-
8	8		National Insurar	Briggs	Phillip	Thomas	A & B Manufacturing	Stores	13/10/1973	M	-
5	5		JO10203J	Broadhurst	Liz	Jane	A & B Manufacturing	General Office	02/10/1993	M	British
55	55		National Insurar	Carter	Koby	Anwar	A & B Manufacturing	Engineering	16/08/1990	-	-
50	50		National Insurar	Chen	Tom	Liu	A & B Manufacturing	Engineering	19/10/1985	-	-
35	35		National Insurar	Collins	Samantha	Harriet	A & B Manufacturing	Engineering	07/09/1988	-	-
64	64		National Insurar	Collins	Charles	Dick	A & B Manufacturing	Welder/fabricator	06/08/1987	-	-
2	2		JO19203D	Coope	Michael	Paul	A & B Manufacturing	Engineering	21/08/1991	M	British
27	27		National Insurar	Cooper	Hannah	Louise	A & B Manufacturing	Engineering	06/02/1999	-	-
29	29		National Insurar	Cooper	Rachel	Michelle	A & B Manufacturing	Engineering	26/04/1988	-	-
80	80		National Insurar	Davis	Gabriel	Paul	A & B Manufacturing	General Office	02/09/1997	-	-
85	85		National Insurar	Demache	Anwar	Del	A & B Manufacturing	Engineering	24/05/1980	-	-
92	92		National Insurar	Diana	Abigail	Andrea	A & B Manufacturing	General Office	05/05/1990	-	-

- You have now successfully run a North Time Pro report.



Module:

m/08/140

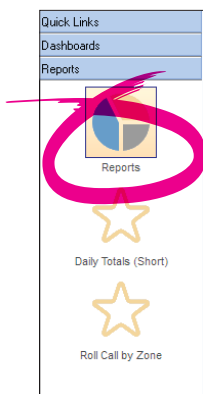
Making a report a favourite



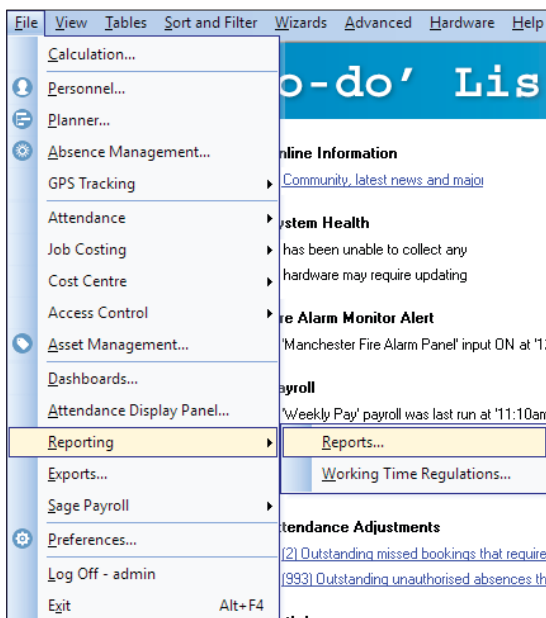
Reports that require the user to select different ranges each time the report is run are NOT suitable to be marked as a favourite!

However, reports with ranges such as 'Today', 'Yesterday', 'Current period' and 'Previous Period' are IDEAL to be marked as favourites!

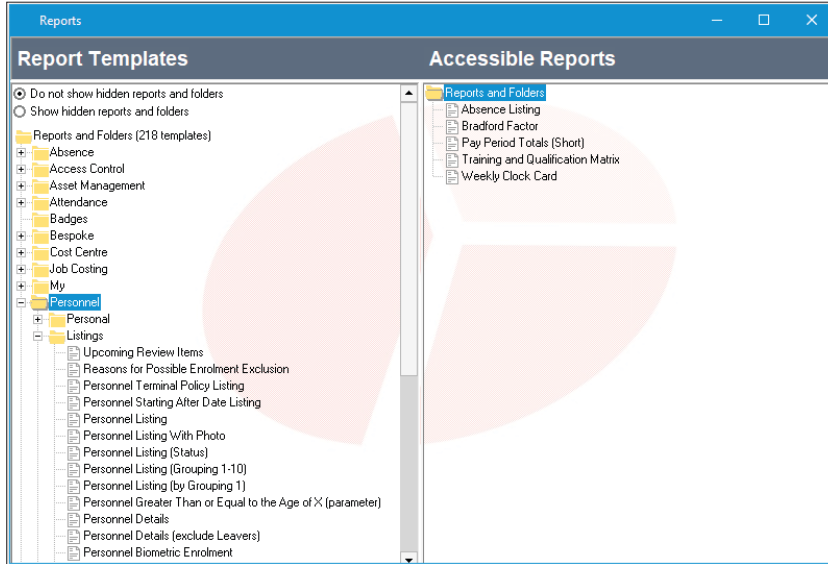
1. Select the Report Quick link



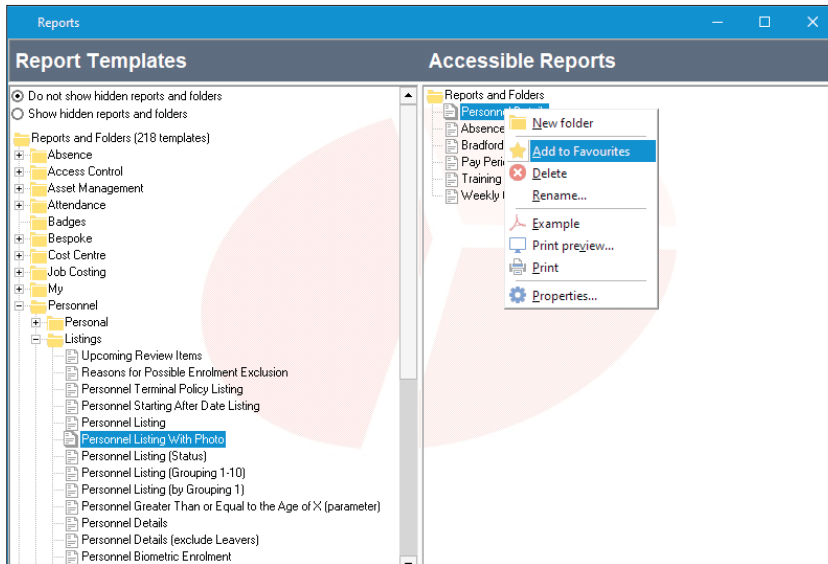
or, select File, then Reporting and click on Reports...



2. The Accessible Reports appear on the right side of the report screen.



3. <Right-click> the report you wish to add to your favourites and select Add to favourites.



Favourite reports are marked with a star.



4. You can see the new, favourite report by clicking on the Favourite Reports slider to the left of the North Time Pro Agenda.



5. You have now successfully added the report to your Favourite Reports list!

Module:

m/08/201

Understanding exports

You will need Excel on your PC and it must be closed.

The North Time Pro application now has a wide range of excel exports designed to give you and your company flexibility in the way you gather reporting information. Once exported into Microsoft Excel (and with a little Excel knowledge!), the possibilities for information manipulation are endless!

All the available exports include examples to assist the user in determining which is suitable for the requirements. Once selected, the exports properties can be modified to include, for example, specific date ranges and certain groups of employees.

The exports are divided into seven major groups;

Standard

Personnel

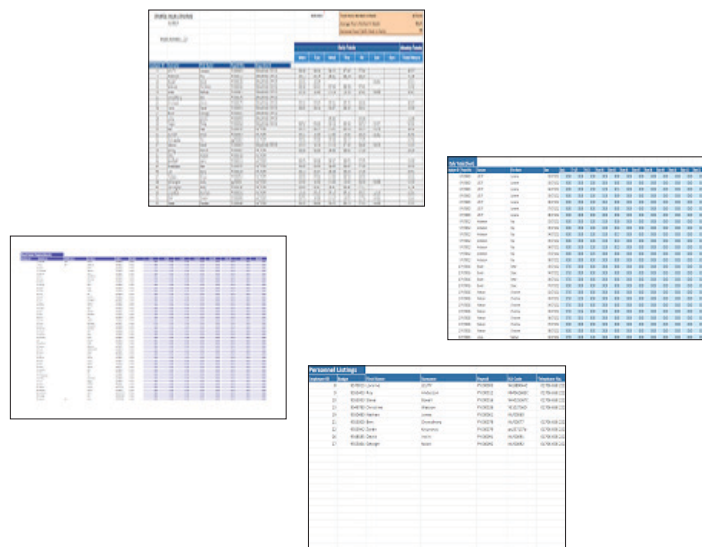
Absence Management

Attendance

Access control

Cost Centre

Job Costing



It is possible for the North Time Pro team to develop customised or bespoke exports for your company. Please contact North Time Pro on +44 (0) 2892 604000 to discuss your exact requirements.

Module:

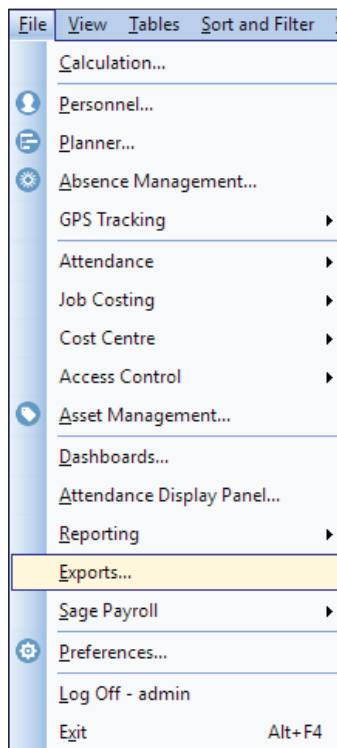
m/08/210

Selecting an export template

1. To access the North Time Pro exports, select the exports Quick link,



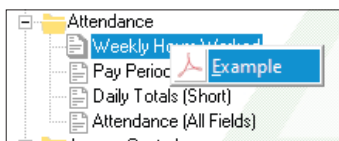
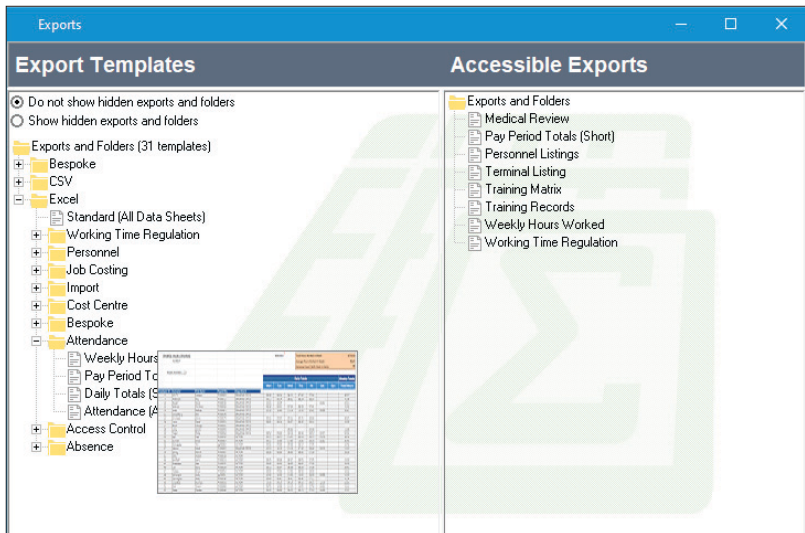
or, select File, then Exports...



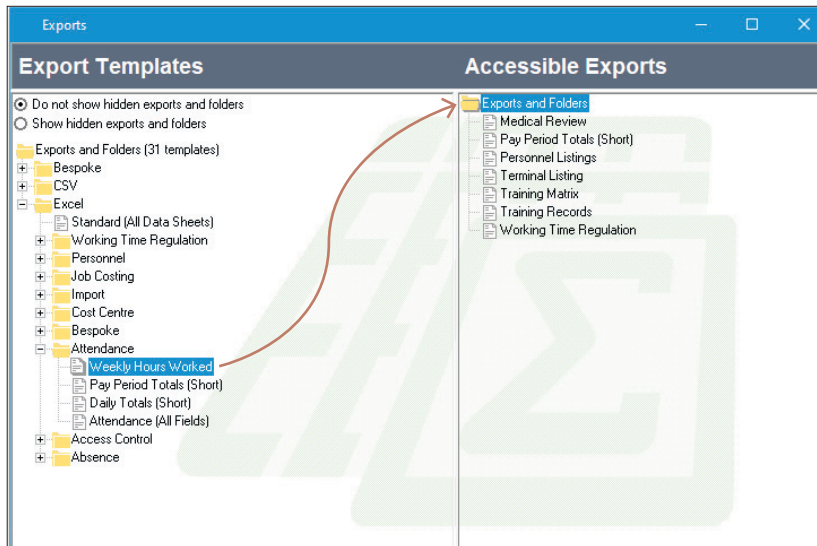
- The North Time Pro exports screen is divided into two sections. On the left are all the available export Templates. On the right are the Accessible exports previously setup by you.



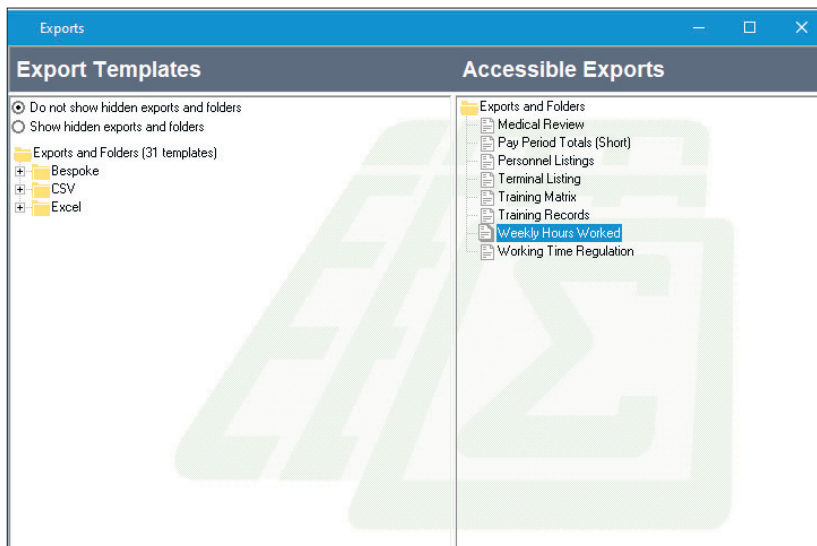
- Double-click on one of the export Template export folders and all its exports become visible. Moving the mouse over each export displays a thumbnail preview. By <Right-clicking> on a export, it is possible to display a full-screen version of the export.



- When you have identified a suitable export, drag the export to the right side of the screen and drop onto exports and Folders beneath the Accessible exports header



- A copy of the export will then appear within export and folders.



- You have now successfully selected a North Time Pro export template.

Module:

m/08/220

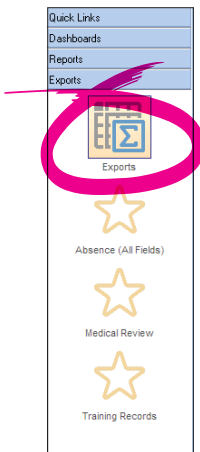
Setting the export properties



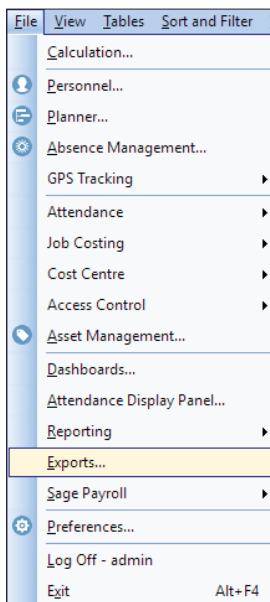
Exports properties are generally different on each export.

This module shows the user how to modify properties. Once the user understands the principles behind this technique, experimenting with the properties of new export becomes less challenging!

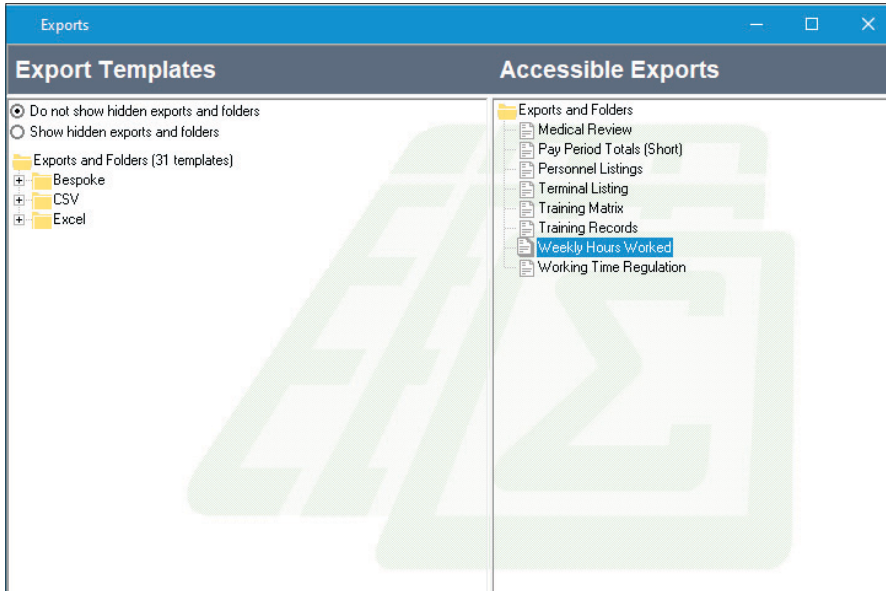
1. Select the exports Quick link



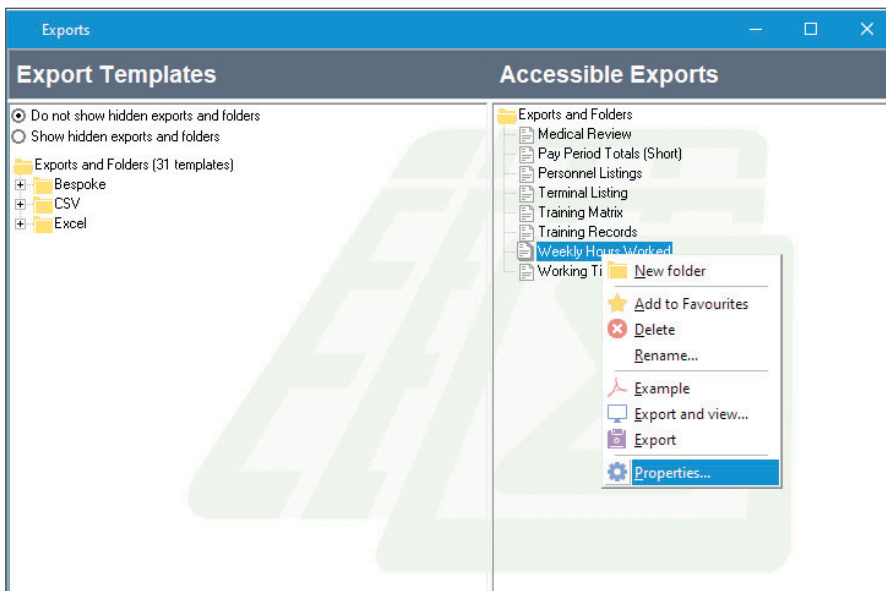
or, select File, then Exports...



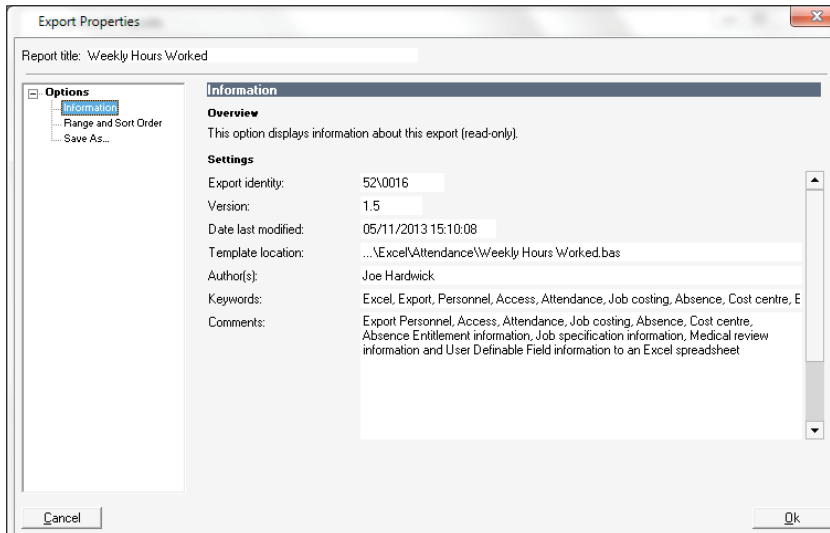
- The Accessible Exports appear on the right side of the export screen.



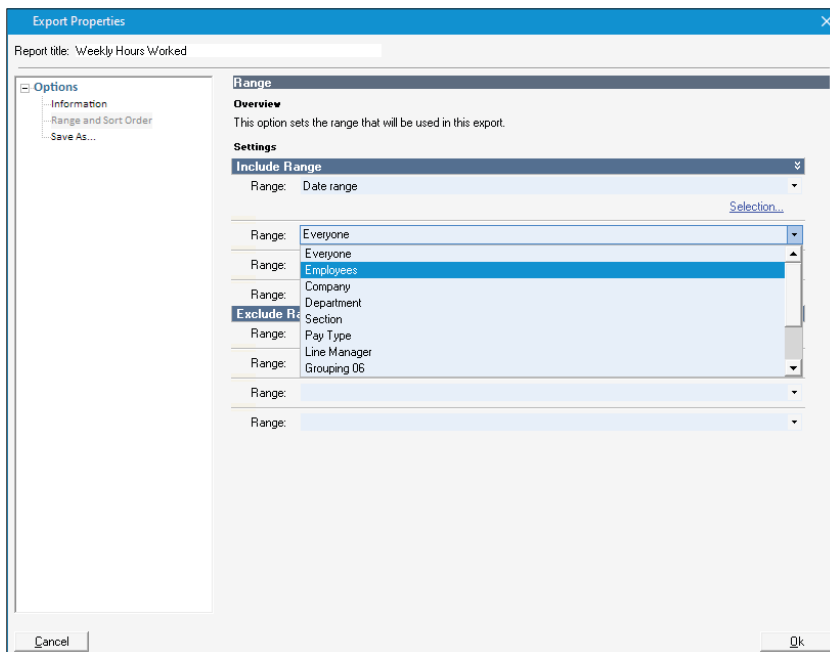
- <Right-click> on the export and select Properties...



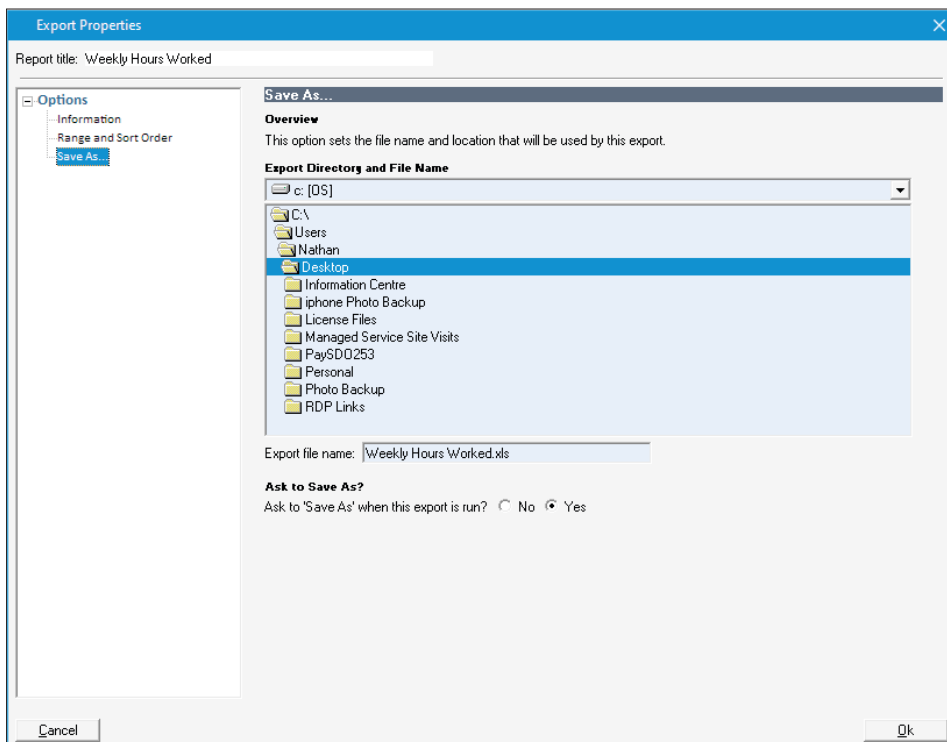
4. Selecting Information displays useful details such as version, date modified, author and comments. These fields do not affect the ranges, sort order or appearance of an export – they are used for support purposes only.



5. Selecting Range and Sort Order enables the user to specify date ranges and the employees to include in the export.



6. Selecting Save As enables the user to specify certain details about the running of the export such as:
 - a The user can specify the location to save the file by default
 - b The user can change the default file name of the export that will be created.
 - c The user can change whether or not the export should be saved or immediately ran.



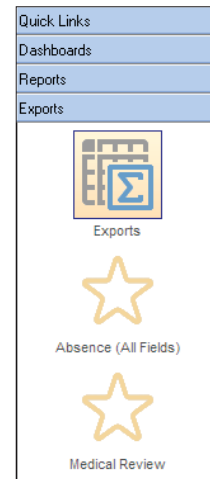
7. Finally, click <OK> to save the modified Export Properties.

Module:

m/08/230

Running an export

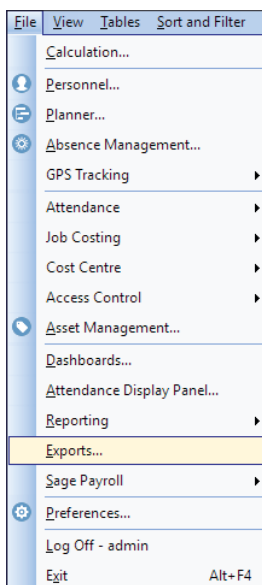
1. If the Export is a favourite, select the Favourite Exports Quick Links and <Click> the desired export.



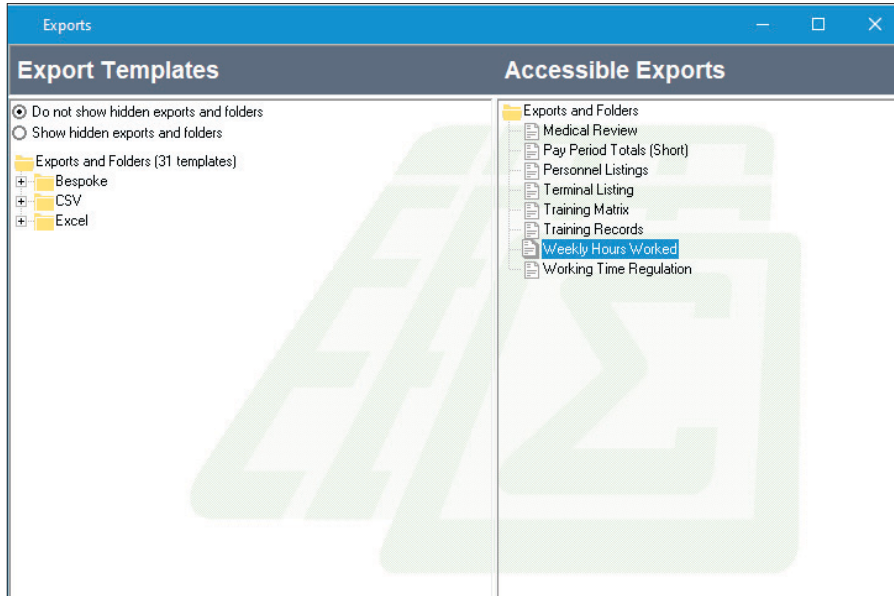
2. If the export is not a favourite, select the Export Quick link:



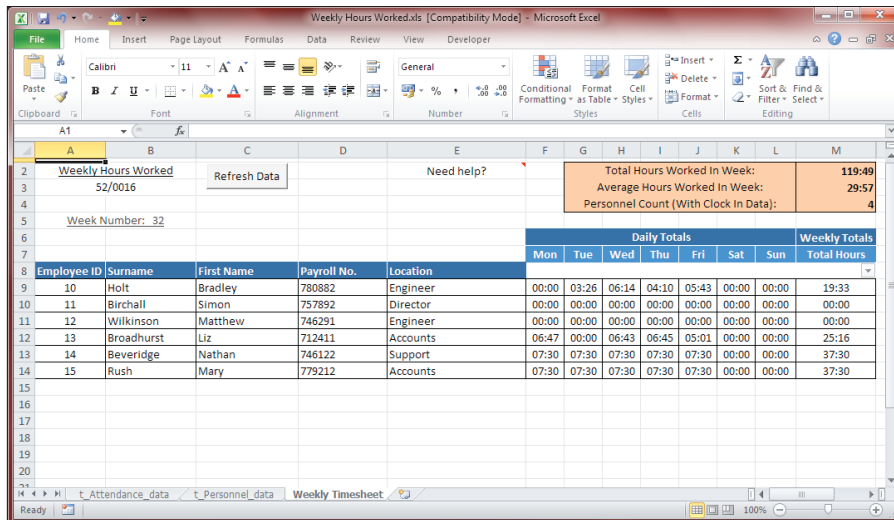
or, select File, then Exports...



3. The Accessible Exports appear on the right side of the export screen.



4. <Double-click> the export and you will be prompted to save the export. Choose the file path desired and click save. The export will now open in Excel.



5. You have now successfully run a North Time Pro export.



A series of horizontal lines for taking notes, consisting of approximately 25 lines spaced evenly down the page.

Module:

m/08/240

Making an export a favourite



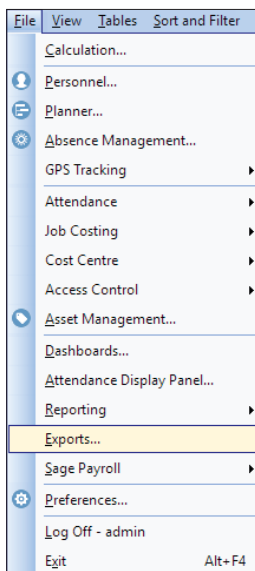
Exports that require the user to select different ranges each time the export is run are NOT suitable to be marked as a favourite!

However, exports with ranges such as 'Today', 'Yesterday', 'Current period' and 'Previous Period' are IDEAL to be marked as favourites!

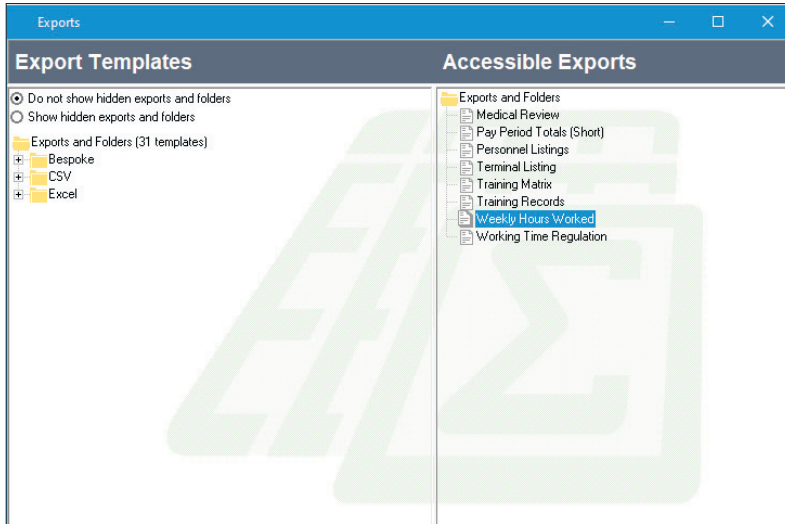
1. Select the Export Quick link



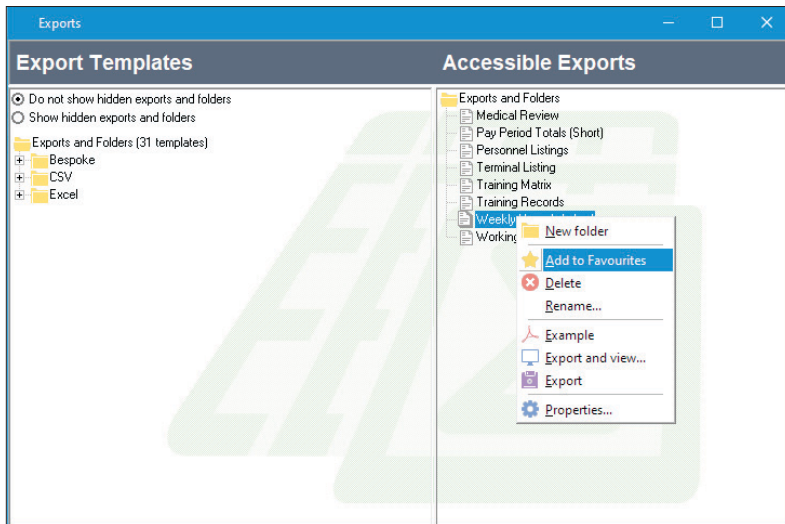
or, select File, then Exports...



2. The Accessible Exports appear on the right side of the export screen.



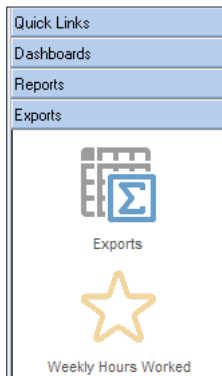
3. <Right-click> the export you wish to add to your favourites and select Add to favourites.



Favourite exports are marked with a star.



4. You can see the new, favourite export by clicking on the Favourite Exports slider to the left of the North Time Pro To-do List.



5. You have now successfully added the export to your Favourite Exports list!

