

Establishment report – Managers Access

You will see the establishment report under the Personnel Tab, under ‘Your establishment’

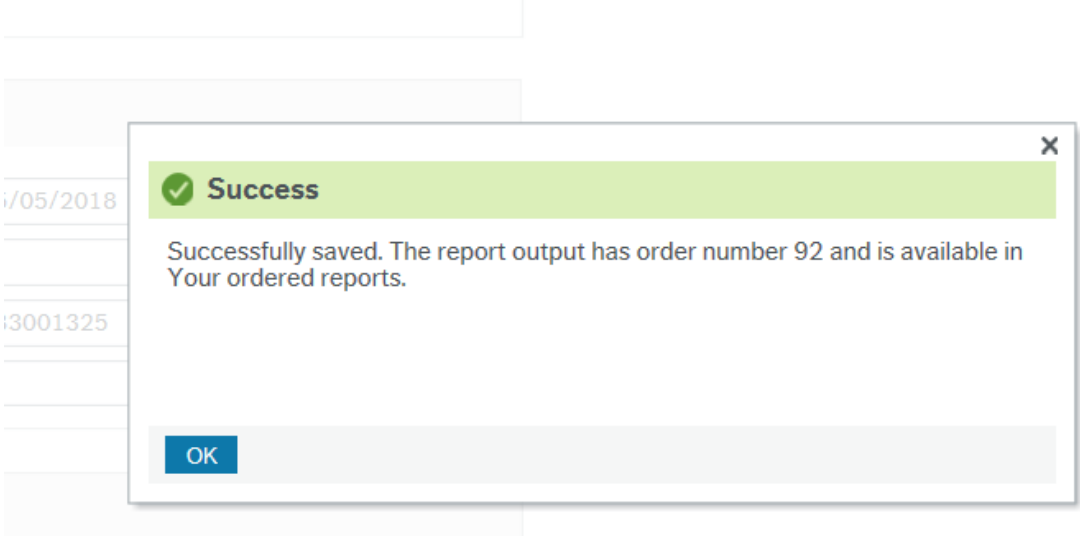
The screenshot shows the ERP Gold menu interface. On the left, a 'Menu' sidebar contains several categories: 'Your employment', 'Forms', 'Time and expenses', 'Personnel' (highlighted with a red box), 'Payroll', and 'Procurement'. The main content area is divided into two columns: 'Personnel' and 'Competence'. Under the 'Personnel' column, the 'Your Establishment' option is highlighted with a pink box. Other options in this column include 'Absence Report', 'Establishment Report by Direct Rep...', 'Appoint a new starter (10)', 'Appoint an internal mover (10)', 'Create a position (10)', 'Pay a partial acting up (10)', 'Pay an honorarium (10)', and 'Add an agency worker (10)'. The 'Competence' column lists various options such as 'Competence', 'Competence - All resources', 'Competence information', 'Competence information - All resour...', 'Requirement rules and analysis', 'Attribute requirement analysis', 'Requirement setup', 'Multi-relations', 'Competence enquiry - Resources', and 'Workflow enquiry - Competence'.

The report runs from the current date although this can be changed.

Click save.

The screenshot shows the 'Your Establishment' configuration page. It features four main sections: 'General parameters', 'Open parameters', 'Fixed parameters', and 'Printer parameters'. The 'Open parameters' section is expanded, showing the 'Establishment as at' field with the date '11/07/2018' entered. A pink box highlights the date field, and a callout box with a calendar icon points to it, containing the text 'You can change the date if required'. At the bottom of the page, there is a row of buttons: 'Save' (highlighted with a pink box), 'Your ordered reports', 'Report variants', and 'Export'.

Once saved you will see a success box with a report number on it. Click on 'Your ordered reports' to see your report.



Click refresh until the report says 'finished' in the Status. You can then click on show report where the report will export into excel you may need to enable editing once in Excel).

Your ordered reports

Scheduled

From: 25/05/2018 To: 25/05/2018

Filter

Ordered reports

<input type="checkbox"/>	Show report	User	Report name	Report ID	Order numb...	Scheduled	Completed	Server queue	File name	Status	Zoom	Show log	
<input type="checkbox"/>			2310018... Establishment Report by...	ESTAB	92	25/05/2018	25/05/2018	SYSTEMS	estaba_92.xlsx	Finished			Filter

Refresh Clear Print Download Export

If you wish to see the previous post number from the legacy system you will find this under Column J, 'MIGPOSID'