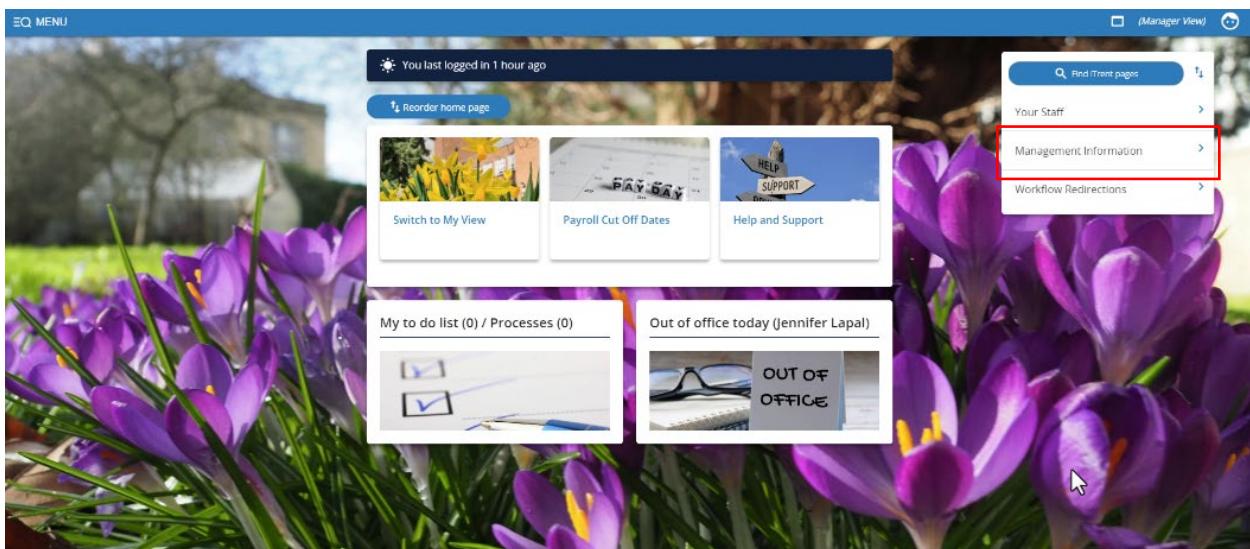


# Manager View

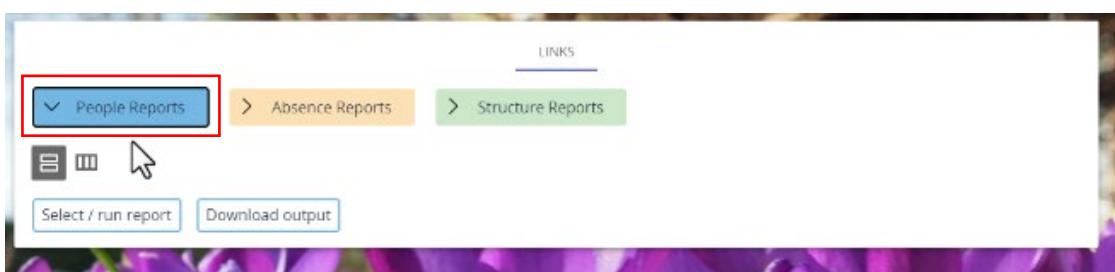
## People reports

A variety of reports come as standard within *iTrent*. Here we will be looking at **People reports**.

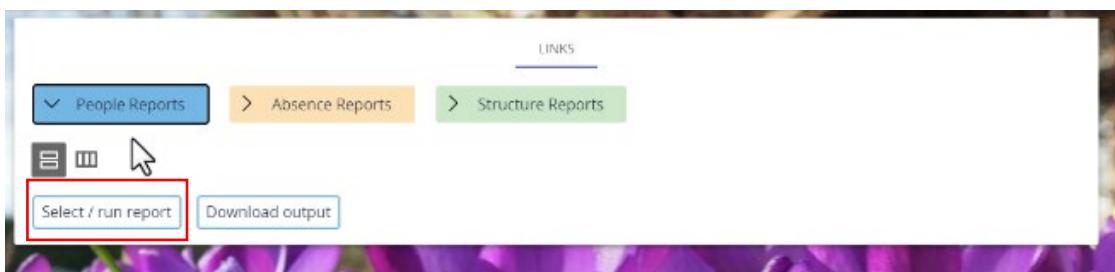
From the home screen select **Management Information**.

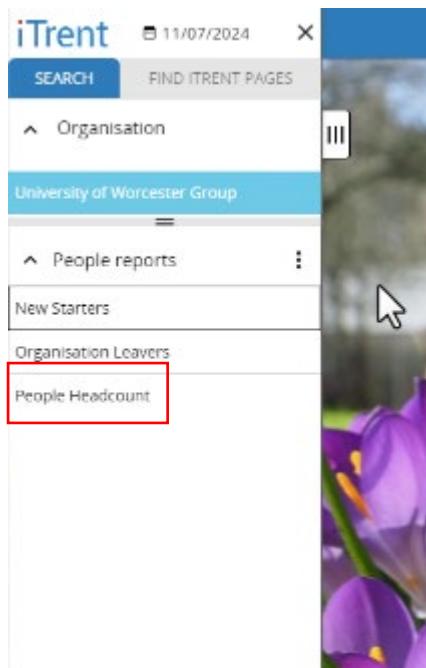


**People Reports.**



And **Select/run report**.

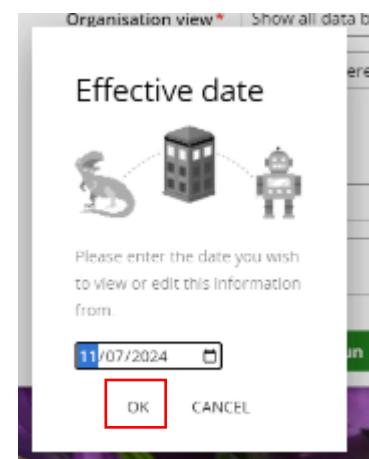




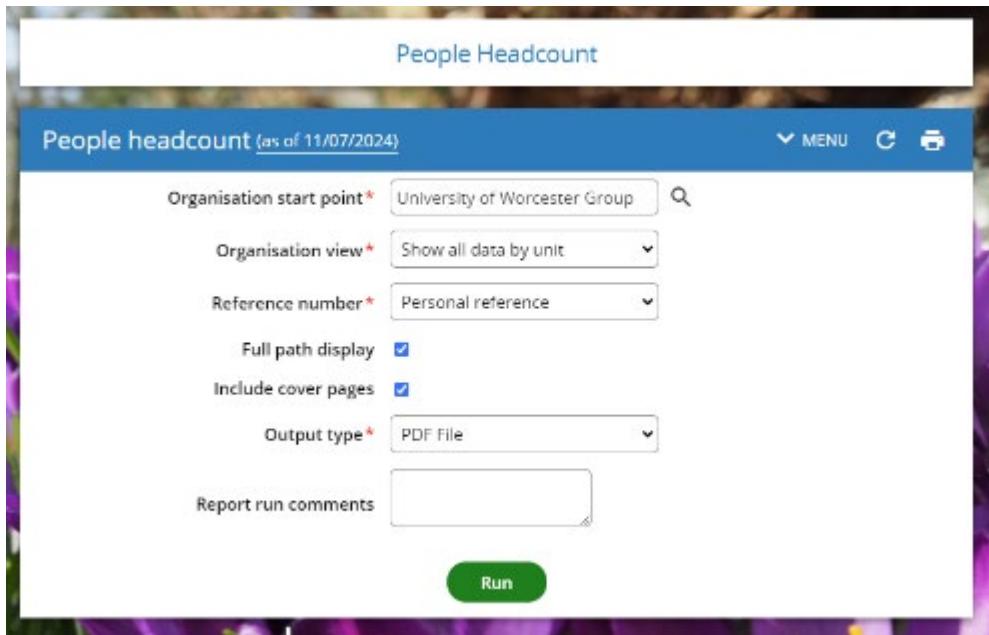
The iTrent interface shows the 'People Headcount' report selected on the left-hand sidebar. The 'People Headcount' option is highlighted with a red box. A cursor is pointing at the report list.

The available reports are displayed on the left-hand side of the screen.

In this example we will select the **People Headcount** report.



This report is date effective, so provide a date in the date selection box and select **OK**.



The 'People Headcount' report configuration screen is shown. It includes fields for 'Organisation start point' (set to 'University of Worcester Group'), 'Organisation view' (set to 'Show all data by unit'), 'Reference number' (set to 'Personal reference'), 'Full path display' (checked), 'Include cover pages' (checked), 'Output type' (set to 'PDF File'), and 'Report run comments' (an empty text area). A 'Run' button is at the bottom.

Here you can refine the report as follows.

**Organisation starting point:** You can report on all employees or workers in your line manager hierarchy.

**Organisation view:** Decide if you wish to report on the selected unit alone or all units below the point selected.

**Reference number:** Leave this defaulted as **Personal reference**.

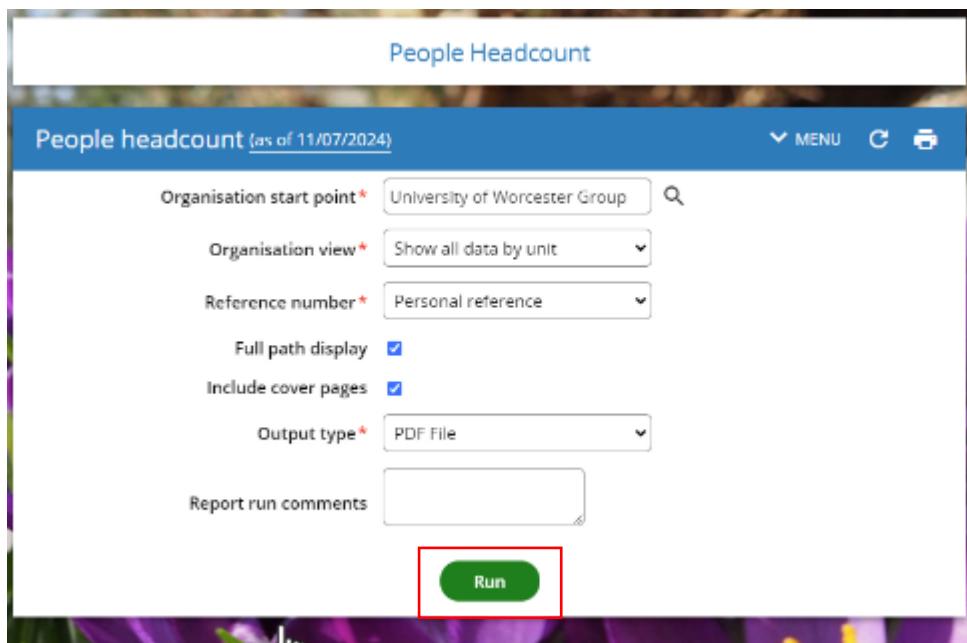
**Include cover pages:** Decide if you wish to include a cover page which summarises the design of the report.

**Output type:** Select how you wish to view the report, either PDF or Excel (csv) file.

**Report comments:** You can add a comment to your report, which will be displayed when you view your report in a list of downloads later.

In this example, we are reporting on the whole University, and we have defined that we wish to view all data by unit in a PDF file.

When ready, select **Run**.

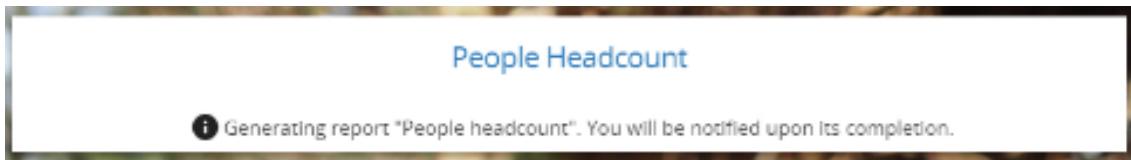


The screenshot shows the 'People Headcount' report configuration screen. The title 'People Headcount' is at the top. Below it, the report title is 'People headcount (as of 11/07/2024)'. The configuration fields are as follows:

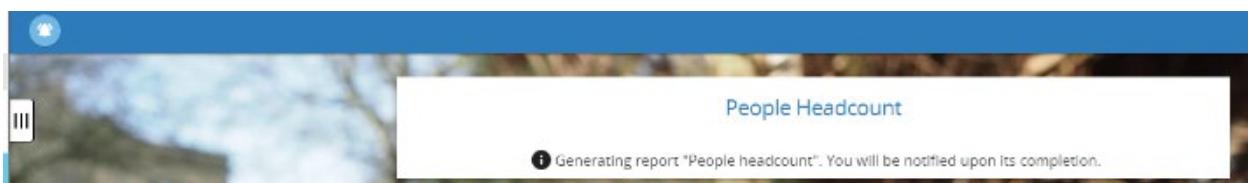
- Organisation start point\***: University of Worcester Group
- Organisation view\***: Show all data by unit
- Reference number\***: Personal reference
- Full path display**:
- Include cover pages**:
- Output type\***: PDF File
- Report run comments**: (empty text area)

A red box highlights the 'Run' button at the bottom of the form.

You will see a message in the top bar of this screen notifying you that your report is being processed.



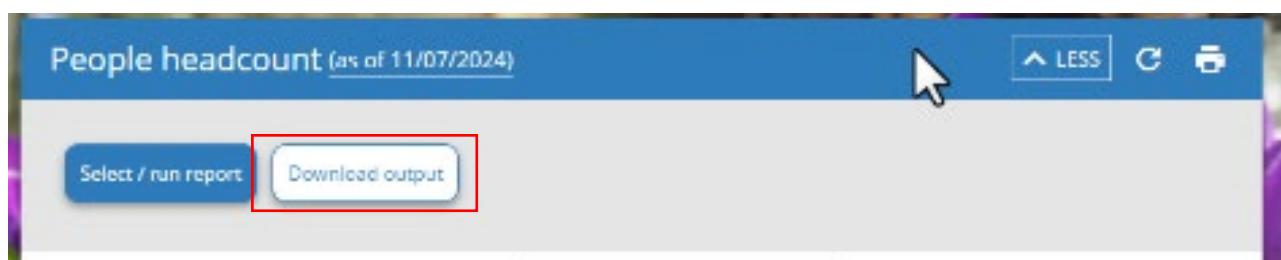
Wait until you see a **bell symbol** in the top blue bar, which will display when the report is ready.



When the symbol appears select **Menu**.

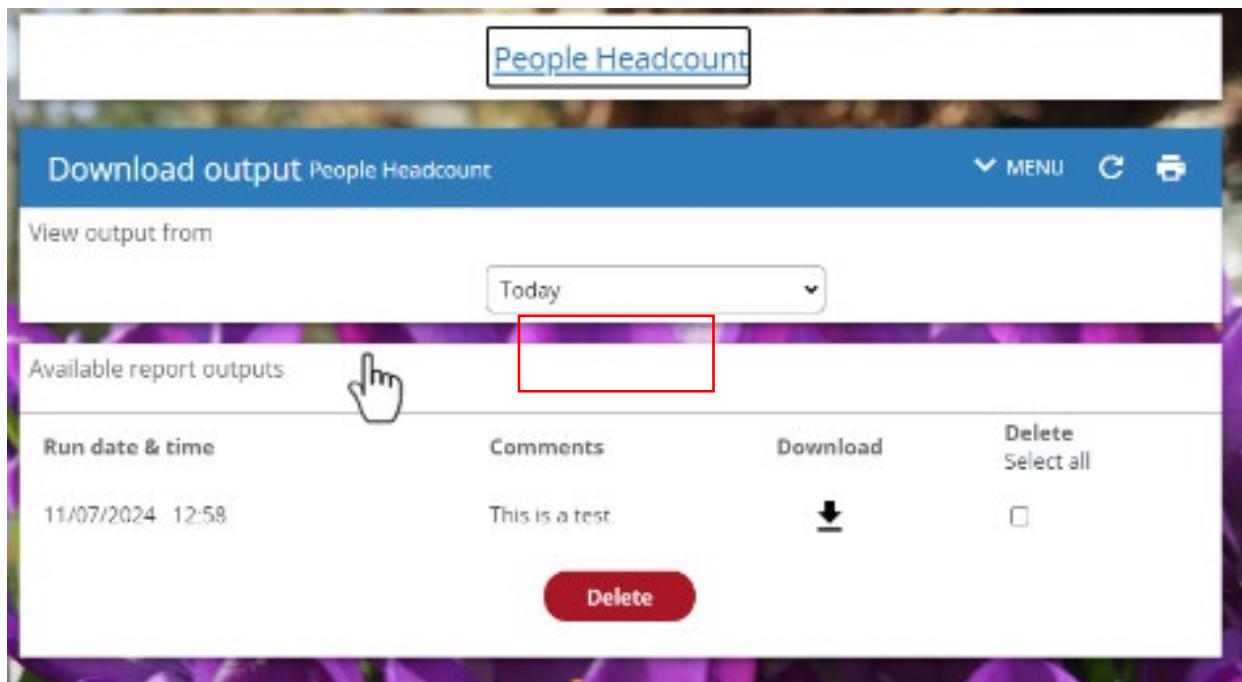


This will display an option to **Download output**. Select this.



Your report is now available to download.

To download, select the **download icon**. This can then be retrieved from the top right-hand corner or be found in the downloads folder of your device.

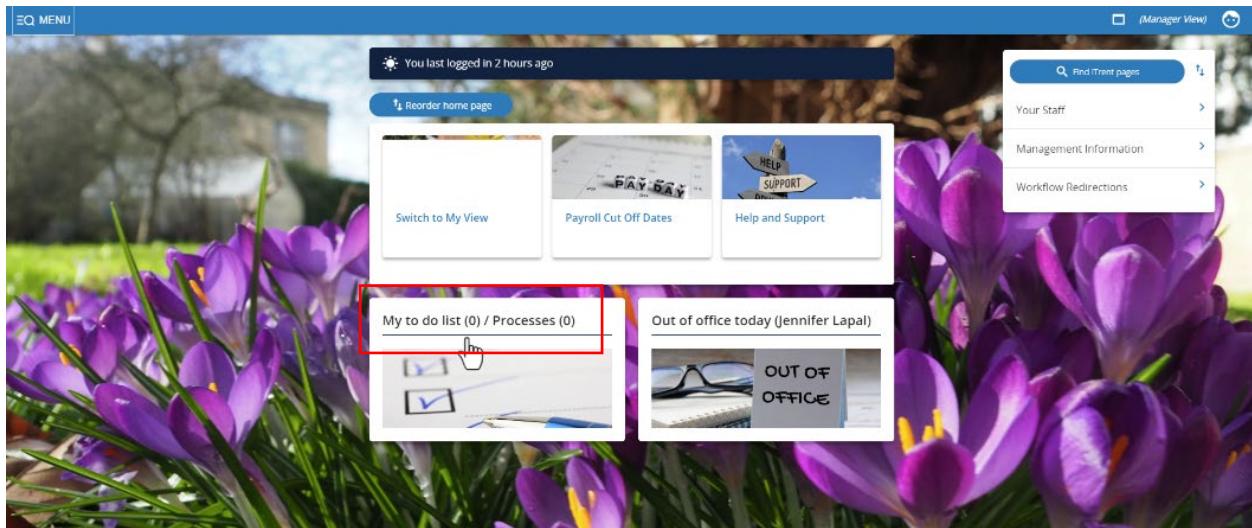


The report will look similar to this.

iTrent		University of Worcester Group						
People Headcount								
Effective Date:	11/07/2024	Organisation Start	University of Worcester Group					
Organisation View:	Full							
People in multiple positions and multiple units will be counted as one.								
Forename	Surname	Per Ref.	Start Date	Position Name	Length of Service			
<b>University of Worcester Group/University of Worcester/Education, Society &amp; Culture</b>								
Jemima	Puddle		02/01/2024	Senior Lecturer (Teaching) in Child Development TEST	0 yrs 0 mths			
Jennifer	Lapal		01/01/2018	Senior Lecturer (Teaching) in Child Development TEST	6 yrs 0 mths			
John	Darcy		01/06/2020	Principal Lecturer (Teaching) in Nursery Education TEST	4 yrs 1 mths			
Shaun	Locke		06/05/2024	Senior Lecturer (Teaching) in Child Development TEST	0 yrs 2 mths			
					<b>Unit Headcount:</b> 4			
					<b>Organisation Headcount:</b> 4			

It is good practice to return to the list of reports and delete them when they are no longer required.

Please note, you can also retrieve reports from your to do list.



Select this **My to do list/ Processes** and select the **Processes** tab.

