

# **Creating a New Report**

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## Create New Report



### Creating a New Report – WBS Wizard

It is important to plan out your report before creating it. You should ask yourself the following questions: -

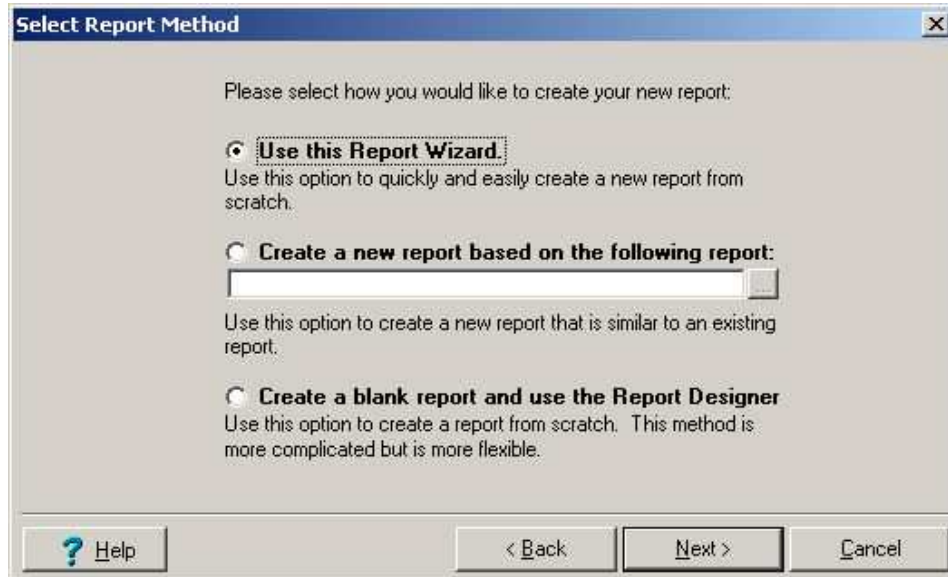
- a) What fields do I want to report on
- b) What screen will I find those fields in

1. Click on **Reports** (menu bar)
2. Click on **Create New Report...**
3. Click on **Next>**



4. Select **Use This Report Wizard**
5. Click on **Next>**

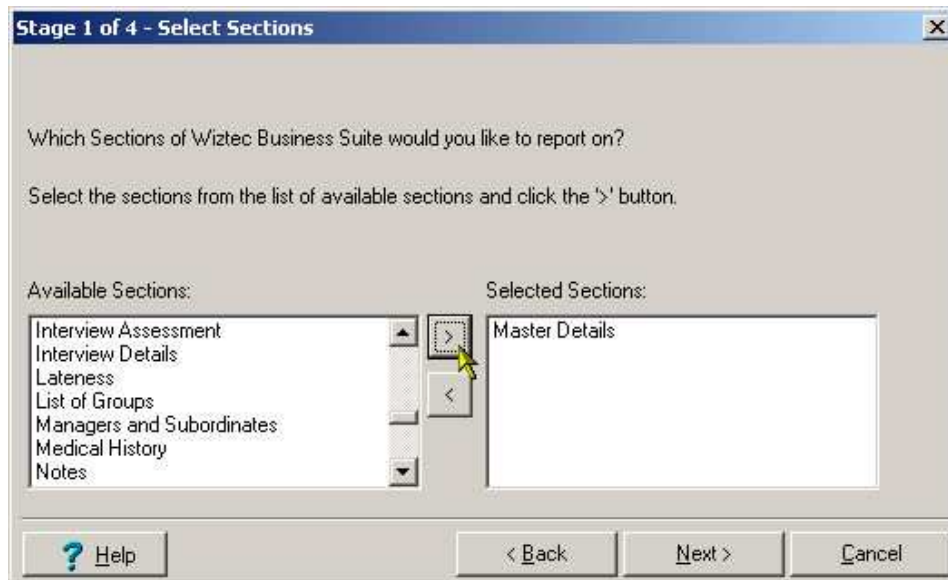
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6. Under **Available Sections**, select the screens that contain the information you want to extract (e.g. Master Details)



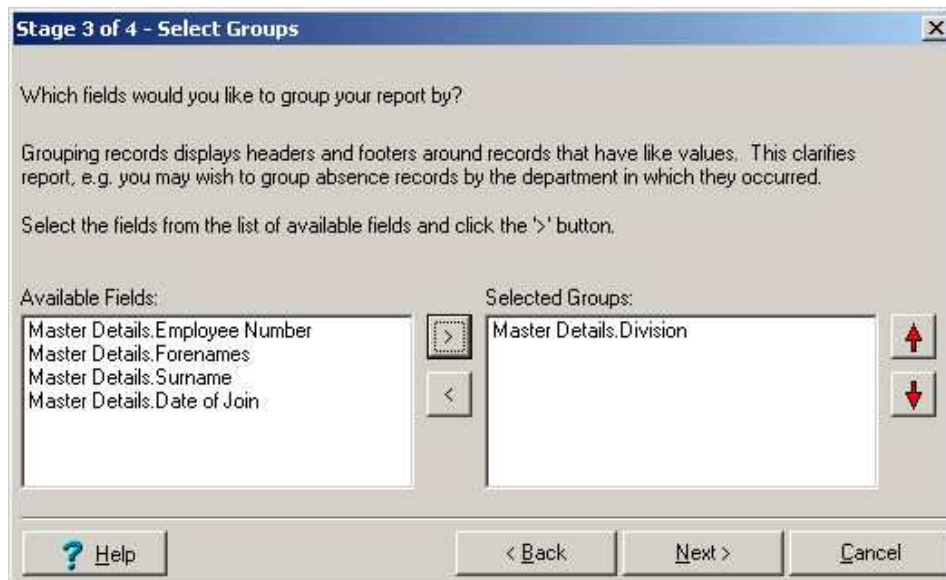
7. Click on the **Add** button



8. Repeat for each screen you want to include
9. Click on **Next>**
10. Select the **field(s)** you want to extract from the tables you selected (e.g. Employee Number)
11. Click on the **Add** button.
12. Repeat for each field you want to include

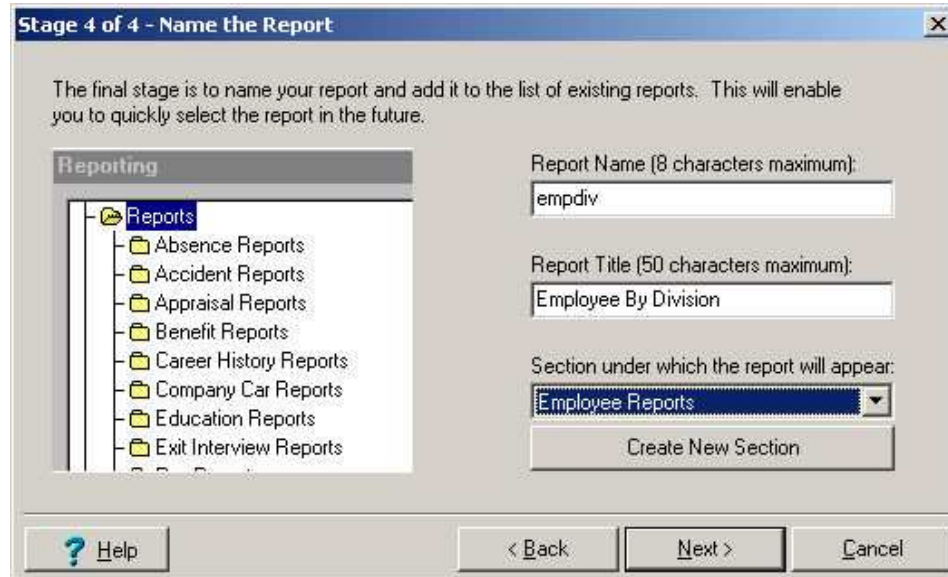


13. Click on **Next>**
14. Select the field you want to group the extracted information by (e.g. Department)  
Do not use the grouping option if you are merely looking for a list report. Skip this step and click on **Next >**



15. Click on the **Add** button
16. Click on **Next>**

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17. Type in a name for the report (e.g. deptpay). This is the name the report will be saved as.
18. Type in a description for the report (e.g. Personnel Pay Details by Department). This is the description that will be displayed in the **Select Report** dialog box.
19. Select the folder where the report will be stored (e.g. Employee Reports)
20. Click on **Next>**
21. Click on **Finish**
22. Click on the **Preview Report** tab
23. A Confirm message box may appear, click on **OK**

