Report Builder – HR Reporting Model

The HR reporting model allows you to retrieve all user associated data via Microsoft Report Builder. The following is a guide to all of the entities and their fields within this model, as well as the relationships that link them together.

Contents

Creating custom reports using Report Builder

Report Builder is a Microsoft reporting tool that allows you to create custom reports specific to your business requirements. For more information on how to purchase or access the Report Builder module, please contact the V1 Project Accounting customer support team (support.pa@wearev1.com).

Report Builder support

Unfortunately due to the inherent flexibility and complicated nature of reporting software, we do not offer free telephone support for Report Builder. Instead we offer both dedicated one-one training and classroom training options to get the full value from Report Builder. We strongly suggest that clients attend a classroom course in the first instance, followed by one-one training if necessary depending on your reporting requirements. If suitable we can also offer pre-booked one to one specialist training by telephone.

Report Builder training

Please see the help topic Report Builder training for information on how you can obtain training on Report Builder.

The following link also contains useful 'How-to' topics relating to the use of Report Builder:
http://msdn2.microsoft.com/en-us/library/aa337239.aspx

Note: *The login details for accessing Report Builder are different to your usual V1 Project Accounting ones - please e-mail support.pa@wearev1.com to obtain your username and password.*

HR Model Overview

The following diagram shows an overview of the HR reporting model and the way in which its entities are related:
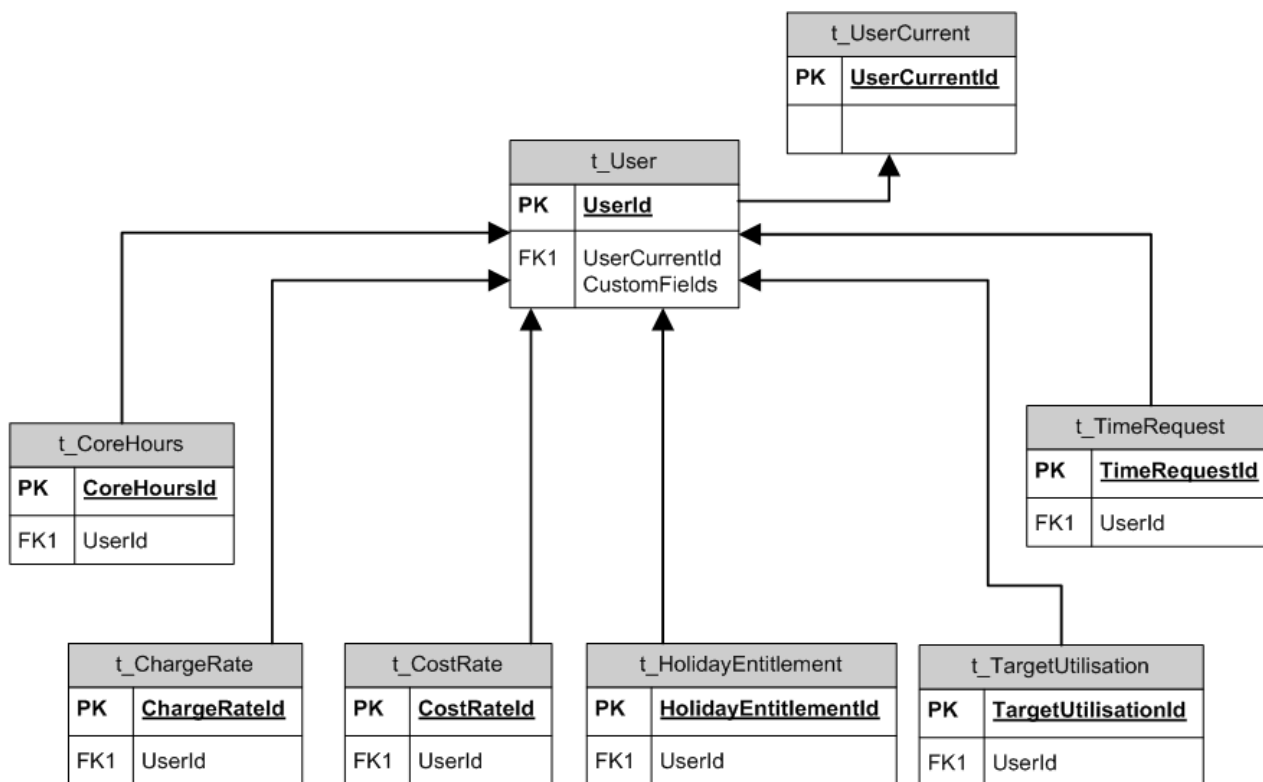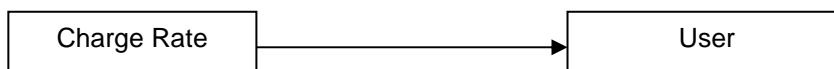

All of the data relates to a user account, and the User Current entity contains fields from all of the other data entities with their current setting.

Charge Rate

This entity contains data on user charge rates. Each charge rate entered on a users profile has its own record.

```
┌─────────────────┐                    ┌─────────────────┐
│   Charge Rate   │ ─────────────────▶ │      User       │
└─────────────────┘                    └─────────────────┘
```

Report Builder field name	Location in PM	Type	Description
Charge Rate Id	n/a	Numeric Value	Internal database Id of the charge rate
Charge End Date	Admin > Users > User Profiles	Date	Date the charge rate ends
Total Charge Rate	Admin > Users > User Profiles	Numeric Value	Value of the charge rate (£)
Charge Start Date	Admin > Users > User Profiles	Date	Date the charge rate becomes effective

Core Hours

This entity contains data on user core hours. Each set of core hours entered on a user's profile has its own record.

```
┌─────────────────┐                        ┌─────────────────┐
│   Core Hours    │ ─────────────────────► │      User       │
└─────────────────┘                        └─────────────────┘
```
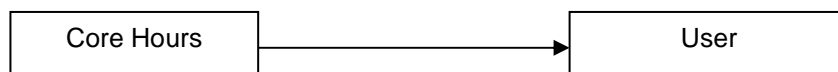
Report Builder field name	Location in PM	Type	Description
Core Hours Id	n/a	Numeric Value	Internal database Id of the set of core hours
Core Hrs End Date	Admin > Users > User Profiles	Date	Date the set of core hours end
Total Core Hrs Monday	Admin > Users > User Profiles	Numeric Value	Number of core hours worked on a Monday
Total Core Hrs Tuesday	Admin > Users > User Profiles	Numeric Value	Number of core hours worked on a Tuesday
Total Core Hrs Wednesday	Admin > Users > User Profiles	Numeric Value	Number of core hours worked on a Wednesday
Total Core Hrs Thursday	Admin > Users > User Profiles	Numeric Value	Number of core hours worked on a Thursday
Total Core Hrs Friday	Admin > Users > User Profiles	Numeric Value	Number of core hours worked on a Friday
Total Core Hrs Saturday	Admin > Users > User Profiles	Numeric Value	Number of core hours worked on a Saturday
Total Core Hrs Sunday	Admin > Users > User Profiles	Numeric Value	Number of core hours worked on a Sunday
Core Hrs Start Date	Admin > Users > User Profiles	Date	Date the set of core hours become effective
Total Standard Day Hours	Admin > Users > User Profiles	Numeric Value	Standard number of days worked in the week by the user

Cost Rate

This entity contains data on user cost rates. Each cost rate entered on a users profile has its own record.

```
┌─────────────────┐            ┌─────────────────┐
│   Cost Rate     │ ─────────▶ │      User       │
└─────────────────┘            └─────────────────┘
```
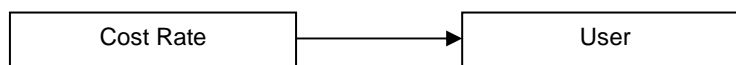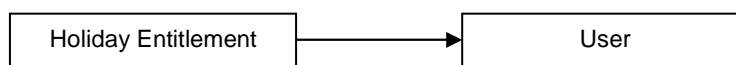
Report Builder field name	Location in PM	Type	Description
Cost Rate Id	n/a	Numeric Value	Internal database Id of the charge rate
Cost End Date	Admin > Users > User Profiles	Date	Date the cost rate ends
Total Cost Overhead	Admin > Users > User Profiles	Numeric Value	Value of the overhead (£)
Total Cost Rate	Admin > Users > User Profiles	Numeric Value	Value of the cost rate (£, salary + overhead)
Total Cost Salary	Admin > Users > User Profiles	Numeric Value	Value of salary (£)
Cost Start Date	Admin > Users > User Profiles	Date	Date the cost rate becomes effective

Holiday Entitlement

This entity contains data on user's holiday entitlement for different holiday years. There is a record for each user and holiday year.

```
┌──────────────────────┐              ┌──────────────────────┐
│  Holiday Entitlement │ ───────────▶ │         User         │
└──────────────────────┘              └──────────────────────┘
```

Report Builder field name	Location in PM	Type	Description
Holiday Entitlement Id	n/a	Numeric Value	Internal database Id of the holiday entitlement for a user and year
Hol Ent Annual Holiday Start	Admin > Company Settings > Non Project Activities	Date	Date when the holiday year starts
Total Hol Ent Approved Carried Over From Previous	Timesheet > Absence Requests	Numeric Value	Number of days of approved carry over from the previous year to the given year
Total Hol Ent Approved Carry Over To Next	Timesheet > Absence Requests	Numeric Value	Number of days of approved carry over from the given year to the next year
Total Hol Ent Approved Paid Holiday	Timesheet > Absence Requests	Numeric Value	Number of days of approved paid holiday taken in the given year
Total Hol Ent Approved Remaining Holiday	Reports > Absence Requests	Numeric Value	Number of days of holiday entitlement the user has left in the given year, excluding any non-approved holiday or carry over.
Total Hol Ent Approved Total Absence	Reports > Absence Requests	Numeric Value	Number of days of approved paid holiday, unpaid holiday and user defined absence taken in the given year
Total Hol Ent Approved Unpaid Holiday	Timesheet > Absence Requests	Numeric Value	Number of days of approved unpaid holiday taken in the given year
Total Hol Ent Approved User Defined Absence	Reports > Absence Requests	Numeric Value	Number of days of approved user defined absence taken in the given year
Hol Ent Current Year	Timesheet > Absence Requests	True/False	Indicates whether the given year is the current holiday year
Total Hol Ent Entitlement	Timesheet > Absence Requests or Admin > Users > User Profiles	Numeric Value	Number of days holiday entitlement given to the user in the given year
Total Hol Ent Non Working Time	Timesheet > Absence Requests or Admin > Users > User Profiles	Numeric Value	Number of days public holiday and company time off that the user receives in the given year
Total Hol Ent Rejected Carried Over From Previous	n/a	Numeric Value	Number of days of rejected carry over from the previous year to the given year
Total Hol Ent Rejected Carry Over To Next	n/a	Numeric Value	Number of days of rejected carry over from the given year to the next year
Total Hol Ent Rejected Paid Holiday	Reports > Absence Requests	Numeric Value	Number of days of rejected paid holiday taken in the given year
Total Hol Ent Rejected Total Absence	Reports > Absence Requests	Numeric Value	Number of days of rejected paid holiday, unpaid holiday and user defined absence taken in the given year
Total Hol Ent Rejected Unpaid Holiday	Reports > Absence Requests	Numeric Value	Number of days of rejected unpaid holiday taken in the given year
Total Hol Ent Rejected User Defined Absence	Reports > Absence Requests	Numeric Value	Number of days of rejected user defined absence taken in the given year
Total Hol Ent Standard Holiday	Admin > Company Settings > Non Project Activities	Numeric Value	The standard number of days of holiday entitlement used by the company

Total Hol Ent Submitted Carried Over From Previous	Timesheet > Absence Requests	Numeric Value	Number of days of submitted carry over from the previous year to the given year
Total Hol Ent Submitted Carry Over To Next	Timesheet > Absence Requests	Numeric Value	Number of days of submitted carry over from the given year to the next year
Total Hol Ent Submitted Paid Holiday	Timesheet > Absence Requests	Numeric Value	Number of days of submitted paid holiday taken in the given year
Total Hol Ent Submitted Remaining Holiday	Reports > Absence Requests	Numeric Value	Number of days of holiday entitlement the user has left in the given year, including both approved and submitted holiday and carry over.
Total Hol Ent Submitted Total Absence	Reports > Absence Requests	Numeric Value	Number of days of submitted paid holiday, unpaid holiday and user defined absence taken in the given year
Total Hol Ent Submitted Unpaid Holiday	Timesheet > Absence Requests	Numeric Value	Number of days of submitted unpaid holiday taken in the given year
Total Hol Ent Submitted User Defined Absence	Reports > Absence Requests	Numeric Value	Number of days of submitted user defined absence taken in the given year
Total Hol Ent Year	Timesheet > Absence Requests	Numeric Value	The given holiday year (note that this is in number and not date format)

Target Utilisation

This entity contains data for target utilisation settings. Target utilisation is used on the 'Resource Utilisation vs Target' report in V1 Project Accounting.

Target Utilisation ──────────► User
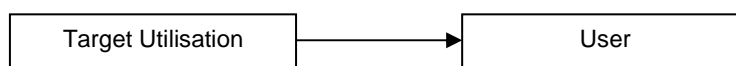
Report Builder field name	Location in PM	Type	Description
Target Utilisation Id	n/a	Numeric Value	Internal database Id of the target utilisation setting
Target End Date	Admin > Users > User Profiles	Date	The end date of the target utilisation setting for the user
Target Percent	Admin > Users > User Profiles	Numeric Value	The percentage value used as target utilisation for the user (used on the 'Resource Utilisation vs Target' report
Target Start Date	Admin > Users > User Profiles	Date	The start date of the target utilisation setting for the user

Time Request

This entity contains holiday request data made by users. Although a holiday request can span several days, each day made in a request has its own record.
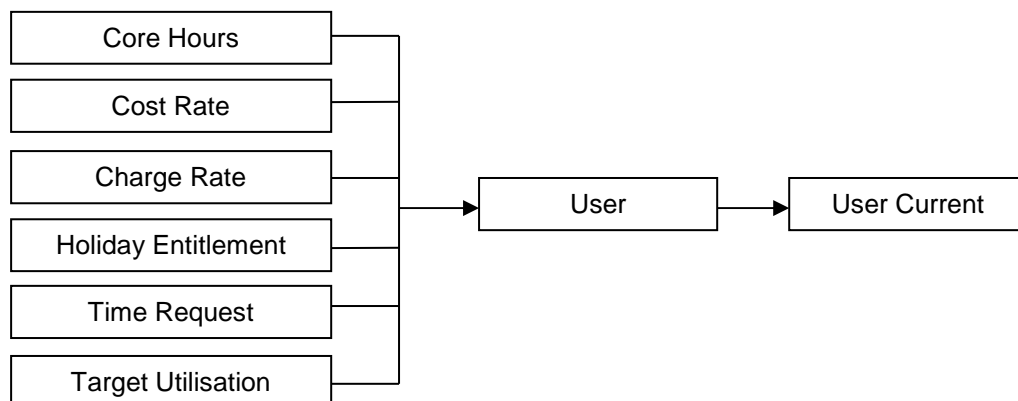
```
┌─────────────────┐              ┌─────────────────┐
│  Time Request   │─────────────▶│      User       │
└─────────────────┘              └─────────────────┘
```
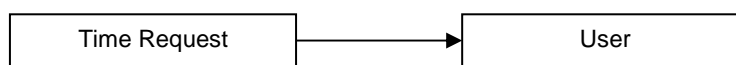
Report Builder field name	Location in PM	Type	Description
Time Request Id	n/a	Numeric Value	Internal database Id of the holiday request
Time Req Absence Desc	Timesheet > Absence Requests	Fixed Text	Description of the absence request. The description of each absence type is set in Admin > Company Settings > Non Project Activities.
Time Req Absence Is User Defined	Timesheet > Absence Requests	True/False	Indicates whether the request is a user defined absence type, rather than a holiday type.
Time Req Approved Date	My Work > My Approvals > Holiday Request	Date	Date the absence request was approved (blank if never approved)
Time Req Approval Status	Timesheet > Absence Requests	Fixed Text	Approval status of the absence request ('Approved', 'Submitted' or 'Rejected')
Time Req Company Holiday Year	Timesheet > Absence Requests	Numeric Value	Holiday year for when the absence request was made
Time Req Current Holiday Year	Timesheet > Absence Requests	True/False	Indicates whether the absence request has been made for the current holiday year
Time Req Date	Timesheet > Absence Requests	Date	Date that was requested as absence
Total Time Req Days	Timesheet > Absence Requests	Numeric Value	Number of days requested as absence. Hourly workers may receive a partial number of days if their work schedule differs to the regional standard.
Time Req Half Day	Timesheet > Absence Requests	True/False	Indicates whether the day requested is a half day or not
Time Req Last Change	Timesheet > Absence Requests	True/False	Indicates whether this request is the most recent entry for the user on the requested day.
Time Req Notes	My Work > My Approvals > Absence Request	Text	Notes made against the absence request by the approver
Time Req Submitted Date	Timesheet > Absence Requests	Date	Date that the absence request was submitted
Time Req Unpaid	Timesheet > Absence Requests	True/False	Indicates whether the absence request was marked as an unpaid holiday

User

This entity contains main summary data on users taken from their user profile.

```
Core Hours
Cost Rate
Charge Rate        ──→    User    ──→    User Current
Holiday Entitlement
Time Request
Target Utilisation
```

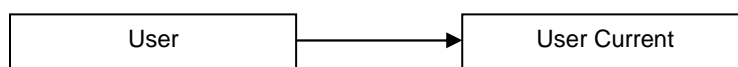| Report Builder field name	Location in PM	Type	Description
User Id	n/a	Numeric Value	Internal database Id of the user account
Usr Accounts Reference	Admin > Users > User Profiles or Admin > AccountsLink > Account References	Text	Accounts reference code used when exporting expenses for this user from the accounts link module
Usr Active User	Admin > Users > User Profiles	True/False	Indicates whether the user is active (true) or inactive (false)
Usr Authorisation Limit	Admin > Users > User Profiles	Text	Amount (£) that when the user exceeds on a purchase order, means that purchase order then requires approval from a second purchase order approver
Usr Business Phone	Admin > Users > User Profiles	Text	Business phone number of the user
Usr Department Name	Admin > Users > User Profiles	Text	Department that the user belongs to
Usr Expenses Approver	Admin > Users > User Profiles	Text	Expenses approver for this user
Usr E-mail	Admin > Users > User Profiles	Text	Email address of the user
Usr Fax	Admin > Users > User Profiles	Text	Fax number of the user
Usr First Name	Admin > Users > User Profiles	Text	First name of the user
Usr Full Name	Admin > Users > User Profiles	Text	Full name of the user
Usr Holiday Approver	Admin > Users > User Profiles	Text	Absence approver of the user
Usr Job Role Name	Admin > Users > User Profiles	Text	The users job role
Usr Last Name	Admin > Users > User Profiles	Text	Last name of the user
Usr Mobile	Admin > Users > User Profiles	Text	The mobile number of the user
Usr Must Submit Core Hours	Admin > Users > User Profiles	True/False	Indicates whether the user is forced to submit their exact number of core hours on their timesheet

User Purchase Order Approver 1	Admin > Users > User Profiles	Text	Purchase order approver of the user
User Purchase Order Approver 2	Admin > Users > User Profiles	Text	Second purchase order approver for the user, required when purchase orders are made above the authorisation limit
Usr Receive Email Alerts	Admin > Users > User Profiles	True/False	Indicates whether the user can receive email alerts from the system
Usr Security Group Name	Admin > Users > User Profiles	Text	The security group that the user belongs to
Usr Supplier Name	Admin > Users > User Profiles	Text	Name of the supplier company that is paid for time worked by the user (associate users only)
Usr Timesheet Approver	Admin > Users > User Profiles	Text	Timesheet approver of the user
Usr User Deleted	Admin > Users > User Profiles	True/False	Indicates whether the user has been deleted from the system
Usr User Name	Admin > Users > User Profiles	Text	Username that the user logs into the system with
Usr User Type	Admin > Users > User Profiles	Fixed Text	Type of user ('Employee', 'Associate' or 'Generic')
Custom Field 1..40	Admin > Users > User Profiles	Text – All custom fields appear in report builder as text, but can be converted to numeric or date format with the appropriate function	These represent the custom fields that have/can be added to your system. Please check the 'Custom Fields' report in V1 Project Accounting to find out which field to use.

User Current

This entity contains data from all of the other data entities in this model which are based on effective date settings, but only shows the value applicable to the current date.

```
┌─────────────────────┐              ┌─────────────────────┐
│        User         │ ──────────►  │    User Current     │
└─────────────────────┘              └─────────────────────┘
```

Report Builder field name	Location in PM	Type	Description
Core Hrs End Date	Admin > Users > User Profiles	Date	Date the current set of core hours end
Total Core Hrs Monday	Admin > Users > User Profiles	Numeric Value	Number of core hours currently worked on a Monday
Total Core Hrs Tuesday	Admin > Users > User Profiles	Numeric Value	Number of core hours currently worked on a Tuesday
Total Core Hrs Wednesday	Admin > Users > User Profiles	Numeric Value	Number of core hours currently worked on a Wednesday
Total Core Hrs Thursday	Admin > Users > User Profiles	Numeric Value	Number of core hours currently worked on a Thursday
Total Core Hrs Friday	Admin > Users > User Profiles	Numeric Value	Number of core hours currently worked on a Friday
Total Core Hrs Saturday	Admin > Users > User Profiles	Numeric Value	Number of core hours currently worked on a Saturday
Total Core Hrs Sunday	Admin > Users > User Profiles	Numeric Value	Number of core hours currently worked on a Sunday
Core Hrs Start Date	Admin > Users > User Profiles	Date	Date the current set of core hours become effective
Total Standard Day Hours	Admin > Users > User Profiles	Numeric Value	Standard number of days currently worked in the week by the user
Charge End Date	Admin > Users > User Profiles	Date	Date the current charge rate ends
Total Charge Rate	Admin > Users > User Profiles	Numeric Value	Value of the current charge rate (£)
Charge Start Date	Admin > Users > User Profiles	Date	Date the current charge rate becomes effective
Cost End Date	Admin > Users > User Profiles	Date	Date the current cost rate ends
Total Cost Overhead	Admin > Users > User Profiles	Numeric Value	Value of the current overhead (£)
Total Cost Rate	Admin > Users > User Profiles	Numeric Value	Value of the current cost rate (£, salary + overhead)
Total Cost Salary	Admin > Users > User Profiles	Numeric Value	Value of the current salary (£)
Cost Start Date	Admin > Users > User Profiles	Date	Date the current cost rate became effective
Hol Ent Annual Holiday Start	Admin > Company Settings > Non Project Activities	Date	Date when the current holiday year started
Total Hol Ent Approved Carried Over From Previous	Timesheet > Absence Requests	Numeric Value	Number of days of approved carry over from the previous year to the given year
Total Hol Ent Approved Carry Over To Next	Timesheet > Absence Requests	Numeric Value	Number of days of approved carry over from the given year to the next year

Total Hol Ent Approved Paid Holiday	Timesheet > Absence Requests	Numeric Value	Number of days of approved paid holiday taken in the given year
Total Hol Ent Remaining Holiday	Reports > Absence Requests	Numeric Value	Number of days of holiday entitlement the user has left in the given year, excluding any non-approved holiday or carry over.
Total Hol Ent Approved Total Absence	Reports > Absence Requests	Numeric Value	Number of days of approved paid holiday, unpaid holiday and user defined absence taken in the given year
Total Hol Ent Approved Unpaid Holiday	Timesheet > Absence Requests	Numeric Value	Number of days of approved unpaid holiday taken in the given year
Total Hol Ent Approved User Defined Absence	Reports > Absence Requests	Numeric Value	Number of days of approved user defined absence taken in the given year
Hol Ent Current Year	Timesheet > Absence Requests	True/False	Indicates whether the given year is the current holiday year
Total Hol Ent Entitlement	Timesheet > Absence Requests or Admin > Users > User Profiles	Numeric Value	Number of days holiday entitlement given to the user in the current holiday year
Total Hol Ent Non Working Time	Timesheet > Absence Requests or Admin > Users > User Profiles	Numeric Value	Number of days public holiday and company time off that the user receives in the given year
Total Hol Ent Rejected Carried Over From Previous	n/a	Numeric Value	Number of days of rejected carry over from the previous year to the given year
Total Hol Ent Rejected Carry Over To Next	n/a	Numeric Value	Number of days of rejected carry over from the given year to the next year
Total Hol Ent Rejected Paid Holiday	Reports > Absence Requests	Numeric Value	Number of days of rejected paid holiday taken in the given year
Total Hol Ent Rejected Total Absence	Reports > Absence Requests	Numeric Value	Number of days of rejected paid holiday, unpaid holiday and user defined absence taken in the given year
Total Hol Ent Rejected Unpaid Holiday	Reports > Absence Requests	Numeric Value	Number of days of rejected unpaid holiday taken in the given year
Total Hol Ent Rejected User Defined Absence	Reports > Absence Requests	Numeric Value	Number of days of rejected user defined absence taken in the given year
Total Hol Ent Standard Holiday	Admin > Company Settings > Non Project Activities	Numeric Value	The standard number of days of holiday entitlement used by the company
Total Hol Ent Submitted Carried Over From Previous	Timesheet > Absence Requests	Numeric Value	Number of days of submitted carry over from the previous year to the given year
Total Hol Ent Submitted Carry Over To Next	Timesheet > Absence Requests	Numeric Value	Number of days of submitted carry over from the given year to the next year
Total Hol Ent Submitted Paid Holiday	Timesheet > Absence Requests	Numeric Value	Number of days of submitted paid holiday taken in the given year
Total Hol Ent Submitted Remaining Holiday	Reports > Absence Requests	Numeric Value	Number of days of holiday entitlement the user has left in the given year, including both approved and submitted holiday and carry over.
Total Hol Ent Submitted Total Absence	Reports > Absence Requests	Numeric Value	Number of days of submitted paid holiday, unpaid holiday and user defined absence taken in the given year
Total Hol Ent Submitted Unpaid Holiday	Timesheet > Absence Requests	Numeric Value	Number of days of submitted unpaid holiday taken in the given year

Total Hol Ent Submitted User Defined Absence	Reports > Absence Requests	Numeric Value	Number of days of submitted user defined absence taken in the given year
Total Hol Ent Year	Timesheet > Absence Requests	Numeric Value	The current holiday year (note that this is in number and not date format)
Target End Date	Admin > Users > User Profiles	Date	The end date of the current target utilisation setting for the user
Target Percent	Admin > Users > User Profiles	Numeric Value	The current percentage value used as target utilisation for the user (used on the 'Resource vs Target' report
Target Start Date	Admin > Users > User Profiles	Date	The start date of the current target utilisation setting for the user