3.06 Reportgenerator "ReportMaker"

The report generator provides, besides the standard charts, another possibility to evaluate the database of Projectile. It can be accessed through any search query. The output format CHART, CSV, HTML, browser view, PDF, RTF or XLS can be chosen. Furthermore, the ReportMaker provides, by using the EDIT-Mode, a convenient way of editing. To use or to create a report, an appropriate guery is required (quick or advanced search of Projectile).

×A	Reports			? X
Rep	eport selection [New report s	selection]	 	
Document type Report			OutputFormat	Create report Report designer
Project	ProjectChart	*	VIEW	▼

In the ReportDesigner, the results of the gueries are processed. The designer consists of a toolbar, the header (name, title, document type), ...

X	Report Projects													?
Comn	non Layout CSV Diagram	Misc												
Name	Projects			1										
Title	Project list			-										
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#	Column content (* Figure)			Aggregate		Grou	up PageBrea	k Visibl	le Sort K	leyAsc#	ChartData	Caption	Number FormatWidt	h % Periodic
1.	Project	~	🇱		~					1 .	~			×
2.	Number	~	***		~	E		V		2 .	~	Number		×
3.	Description	~	🇱		~			V		3 .	~	Description		×
4 .	Customer	~			~	V		V		V 4.	~			×
5.	Status	~			~					₹5.	×			×
6.	Project_manager	~	***		~					Ø 6.	~	Projectmanager		~
7.	Begin_planning	~	🇱		~			V		₹7.	×	Planned Begin		×
8.	End_planning	~	🎞		~	E				☑8.	~	Planned End		~
9.	Planned_time	~	••• 🇱	Agg_Sum	~					9 .	~	Planned Time[h]		×
10 .	Actual_time_spent	~	🎞	Agg_Sum	~					10	· · · · · · · · · · · · · · · · · · ·	Actual Time[h]		~
11.	(Formula)	~	🇱	Agg_Sum	~			V		☑ 11	×	Difference[h]		×
	(Planned_time - Actual_time_sp	pent)												
12.	Total_costs	~	••• 🇰	Agg_Sum	~			7		V 12	· · · · · · · · · · · · · · · · · · ·	Total Costs		~
13.	OfferValue	~	:	Agg_Sum	~			V		V 13	~	Offer Amount		~
14.	Net_sum_of_billed_invoices	~	🏢	Agg_Sum	~			1		14	ANNOTATION			~
15.		×								15				

...and the edit bar.



By using these functionalities, the rows can be modified. Currently six options are available:

- Remove,
- Invert selection,
- Start (marked entries at the beginning of the list),
- Move to (move marked entries one position up),

- From (move marked entries one position down) and
- End (marked entries to the end of the list).

In the work area, the rows can be marked, column contents can be selected and modifications to the rows can be made:

- The functionality allows the selection of referenced elements (for example in project through the customer to the branch of the customer),
- The functionality 🗹 allows the definition of formulas and
- The functionality 🛄 allows the definition of values by text or colors.

In the column "Aggregate function" calculations can be defined. There is a possibility to choose between:

- None,
- Sum,
- Minimum,
- Maximum and
- Average

This functionality is used only for numbers (duration, amounts of money, ...).

The next column ("Group") is used to determine groupings. For the groups appropriate subtotals are displayed. To use this function, sort in the grouping feature in the Advanced Search.

With the functionality "Visibile", it can be determined whether the columns appear in the list or not.

For example, often intermediate results are required for the function \bowtie (formula), which is not relevant for the actual report itself and should be hidden.

Other functions in the ReportDesigner:

- **Sorting and ascending:** Using sorting, the sorting sequence can be established and with the attribute ascending controls, whether the sorting has is ascending (set checkbox) or descending (checkbox is not set)
- **Diagram :** Function for graphic evaluations (axis of the evaluation, description, categorization)
- Caption : Alternative column heading in the report, if the column name should not be used
- Number Format: Format for numerical values
- Width %: Scaling the column width for the output format PDF and RTF
- **Periodic:** Feature of the key figures for handling periods when accrual

These functionality are explained in the following example.

===== Create Query =====

In the example, on the basis of a advanced search, a project chart will be created. Note: By using quick search in the intro, Reports can also be alternatively used and created. However, the advanced search allows more complex queries of the data pool.

First, the advanced search is opened in the toolbar, and here, either a new query is created or an existing query is used.

3/9

X	C Search			? X
Q	Search			
Selectio	n	~		
Name				
Query				
Lookup	Document types	Document fields	Field values	
Ē	Report			
>	Report	×		
	Format	×		
	Chart period	*		
	Start		End 🛛 🗸	
	Period	~		

In the example, a query on the project's master data is loaded, which lists all current parent or top projects (for more information, see chapter 3.05 advanced search).

	Search							? X
Q	Search							
Selection	Top projects (a	ctive) 🗸						
Name	Top projects (a	ctive)						
Query	Project : ((Pa	rent_project =) AND ((S	itatus = "Active") OR	t (Status = "Advar	nce")))			Find
Lookup	Document types	✓ ①	Document fields		Field v	alues	· 6	
B	Report							
•	Report		~					
	Format		~					
	Chart period		~					
	Start	•		End				
	Period		~					

The query then displays the following results as a multiple-selection. Now, the ReportMaker is accessed ...

Last update: 2019/10/25 en:handbuch:kapitel_3:3.06_reportgenerator_reportmaker https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_3:3.06_reportgenerator_reportmaker&rev=1260183520 14:09

X	Collection Top projects (active)								
Colle	ction E	Edit fil	Report	3					
-	- 14	4	page (1	√7 of 1 ▶ ▶ 22	P	1-5/5			
	ŧΞ		Number	Description -	Status				
	1		7	Update Projectile	Active				
	2		6	QM-Module	Active				
	3		12	Programming Projectile	Active				
	4		3	Introduction Projectile	Active				
	5		10	Introduction Projectile	Advance				
	5		10	introduction Projectic	Advance				

... from this multiple-selection.

	[New report s	election] 🗸 🖌	
ocument t	ypeReport	OutputFormat	Create report Report designer
oject	ProjectChart	✓ VIEW	
		EDIT EDIT	Ξ
		M XIS VS	

In the selection report, a standard report (a list of all available elements of the document), or (if available) a defined report can be selected. The following output format can be selected:

- CHART (for graphical evaluation),
- CSV (for example for MS EXCEL or for the use of standard letters),
- EDIT (to edit the selected data records),
- HTML,
- PDF,
- RTF (for example for MS WORD),
- VIEW (Evaluation within the system),
- XLS (for MS EXCEL) or
- XML

Create Reports

To create an new report, the report-designer 🛄 can be accessed with the standard report.

\times	Reports				? X
Rep	eport selection [New report se	election]	~		
Document ty	ypeReport		OutputFormat	Create report Report designer	
Project	[DefaultReport]	*	VIEW	► ►	

In the standard report, all elements, which are in the document project, will be listed as rows (for example project, applicant, contact person, project manager, ...).

X	Report designer Report Project										
	Image: Market with the second secon										
Comn Name Title Docum Time in Max fig	Common Layout CSV Diagram Misc										
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	Number					_	Format		Nene		
□_2.	Description .				✓ 2.	<u>·</u>		_	None		
3.	Begin planning				✓ 3.	•			None		
4.	End planning				✓ 4.	•			None		
5.	External order / project		$\overline{\Box}$		√ 5.	•			None		
6.	ProductionEffort				☑ 6.	•			None		
7.	Customer				₹ 7.	•			None		
8.	Contact	***			₹ 8.	•			None		
9.	Unit •	· · · · · · · · ·			✓ 9.	•			None		
10.	Project manager	· · · · · · · ·			✓ 10.	•			None		
11.	Project team	·			✓ 11.	•			None		
12.	Parent project	III ·			✓ 12.	•			None		
13.	Subprojects •	· 🎫 🔹 🔻			✓ 13.	-			None		
14.	Processes .	🇱 🔹			✓ 14.	•			None		
15.	Milestones -	🇱 🔹 🗸			✓ 15.	•			None		
16 .	Limiting budgets -	🇱 🔹 🔻			✓ 16.	•			None		
17.	ChangeRequests -	🇱 🗸			✓ 17.	•			None		
18.	BeginTime •	III Agg_Sum -			✓ 18.	•			None		
19.	EndTime •	🇱 Agg_Sum 🔹			✓ 19.	•			None		
20.	TargetTime •	I Agg_Sum 🔹			✓ 20.	•			None		
□21.	Planned time	And Sum			✓ 21.	-			None		

By using the selection-box, on the left side, the rows can be modified. In the example, the fields in the left check-box are now marked, which should appear in the report. Afterwards, this selection is inverted (now all lines are marked, which should not be used in the report) ...

X	Rep	ort de	signer	Report Proj	ect			
	*	<u>×.</u>	Doc	ument Edit	View Action	ns		
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Docum	ent type	Proi	Ject					
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Max fig	ures age			• 24 h				
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#	Column	conte	nt (* Fig	jure)				
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√ 2.	Descr	iptio	n			•		
√ 3.	Begin	_plai	nning			•		
√ 4.	End_p	olanr	ning			-		
5.	Exter	nal_o	order_/	_project		•		
<mark>□6</mark> .	Produ	ctior	Effort			•		
₹7.	Custo	mer				•		
√ 8.	Conta	oct				•		
9.	Unit					•		
10.	Projec	t_m	anage	r		•		
11.	Projec	t_te	am			•		
12.	Paren	t_pro	oject			•		
13.	Subp	rojec	ts			•		
14.	Proce	sses				•		
15.	Milest	ones				•		

... and the selected entries are deleted.

×	Show:	Data 🗸	Diagram						
↓ # II	nvert ^{1 content} (* Figure)								
√ 1.	Number		•						
√ 2.	Description	Description •							
√ 3.	Begin_planning •								
√4.	End_planning •								
5.	External_order_/_project		•						
6.	ProductionEffort		•						
√7.	Customer •								
√ 8.	Contact ·								
9.	Unit 🔹								
10.	Project_manager		•						

Alternatively, you can of course also mark and delete all not required rows.

Afterwards, the report is named in the field 'name', the title of the chart is defined (headline in the report) and saved. In addition, some of the fields has been renamed in the column Caption (for example applicant in client).

🔀 💡 🖳 Report Projectiist							
Dokument I	🖳 🖹 🖄 🕅 kk 🕷 Dokument Bearbeiten Ansicht Aktionen						
Allgemein Layout CSV Diagramm Sonstiges							
Name	Projectlist						
Titel	Projektübersicht	-					
Dokumenttyp	Projekt						
Zeitintervall		1 🗸 👘					
Maximales Alter der Kennzahlen	24 h						
	21 11						
XV AAVY							
# Spalteninhalt (* Kennzahl)	Aggree	gatfunktion Gruppes	Sichtbar Sortierung Aufsteig	# Diagramm	Caption	ZahlenformatBreite %	Periodisch
□ 1. Nummer	▼ ✓ ₩		ম য	1.	-		Keine 🔹
2. Bezeichnung			<u> </u>	2.	•		Keine 🔹
□ 3. Plan-Beginn			V V	3.	•		Keine 🔹
4. Plan-Ende			<u> </u>	4.	•		Keine 🔻
5. Auftraggeber				5.	Kunde		Keine 🔹
6. Plan-Aufwand	🔽 🖌 🎹 1 - Su	ımme 🔻 🗆	v	6.	•		Keine 🔹
T 7. Ist-Aufwand	🔻 🖌 🏭 1 - Su	ımme 🔻 🗆	<u> </u>	7.	•		Keine 🔹
□ 8. Angebotswert	🔽 🖌 🇱 1 - Su	ımme 🔻 🗆		8.	Angebote		Keine 🔻
9. Rechnungsbetrag	🔽 🖌 🇰 1 - Su	ımme 🔻 🗆	v	9.	Rechnungen	ii	Keine 🔹

In the tab "Layout" settings can be defined regarding to the report layouts. Here, among other functions, you can specify the number of lines per page, page numbering, grouping types, head and footer layouts and page formats.

🔀 🦹 🖳 Report Projec	tlist
	Dokument Bearbeiten Ansicht Aktionen
Allgemein Layout CSV Diagra	mm Sonstiges
Zeilen pro Seite	80
Seitenzähler	
Erzeugerinformationen anzeiger	
Nur Summen	
Gruppierungs-Modus	
Zwischensummen anzeigen	unten 💌
Gesamtsumme anzeigen	unten 💌
Index anzeigen	
Tabellenkopf anzeigen	
Kopfzeile Report	■ ④ ④ ▲ □
Fußzeile Report	■ ④ ④ ▲ □
Kopfzeile Seite	■ ④ ④ ▲ □
Fußzeile Seite	
Standard-Font	Helvetica 💌
Größe Standard-Font	10
Größe Titel-Font	12
Summen fett	
Summen kursiv	
Summen Hintergrundfarbe	#E5E5E5 🛛 🐹
Papierformat	
Querformat	
Collections in mehreren Zeilen	
Klassisches Dauer-Format	

In the tab "CSV" parameter for the out put options "CSV" can be defined. This format is used for spreadsheets and interface files.

🔀 🦻 🖳 Report Projectlist
Dokument Bearbeiten Ansicht Aktionen
Allgemein Layout CSV Diagramm Sonstiges
Separator 🖑
Listentrenner
Zeilenumbrüche ersetzen

In the tap "Diagram", options for graphic evaluations can be set (explanation follows).

🔀 🥐 🖳 Report Projectlist			
Dokument Bearbeiten Ansicht Aktionen			
Allgemein Layout CSV Diagramm Sonstiges			
Diagrammtyp 🖑	Balken vertikal		
Dateiformat	JPG 💌		
Breite	600		
Höhe	400		
Legende			
Zwischensummen im Diagramm anzeigen 🗖			
Summen im Diagramm anzeigen			

After closing of the new report ...

Report Projectlist		
	Dokument Bearbeiten Ansicht Aktionen	
Allgemein Layout CSV Diagramm Sonstiges		
Name	Projectlist	

... it will be directly available in the ReportMaker.

... continued

