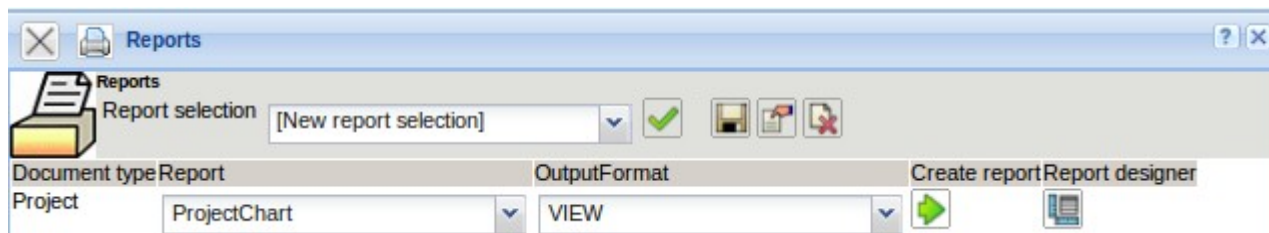


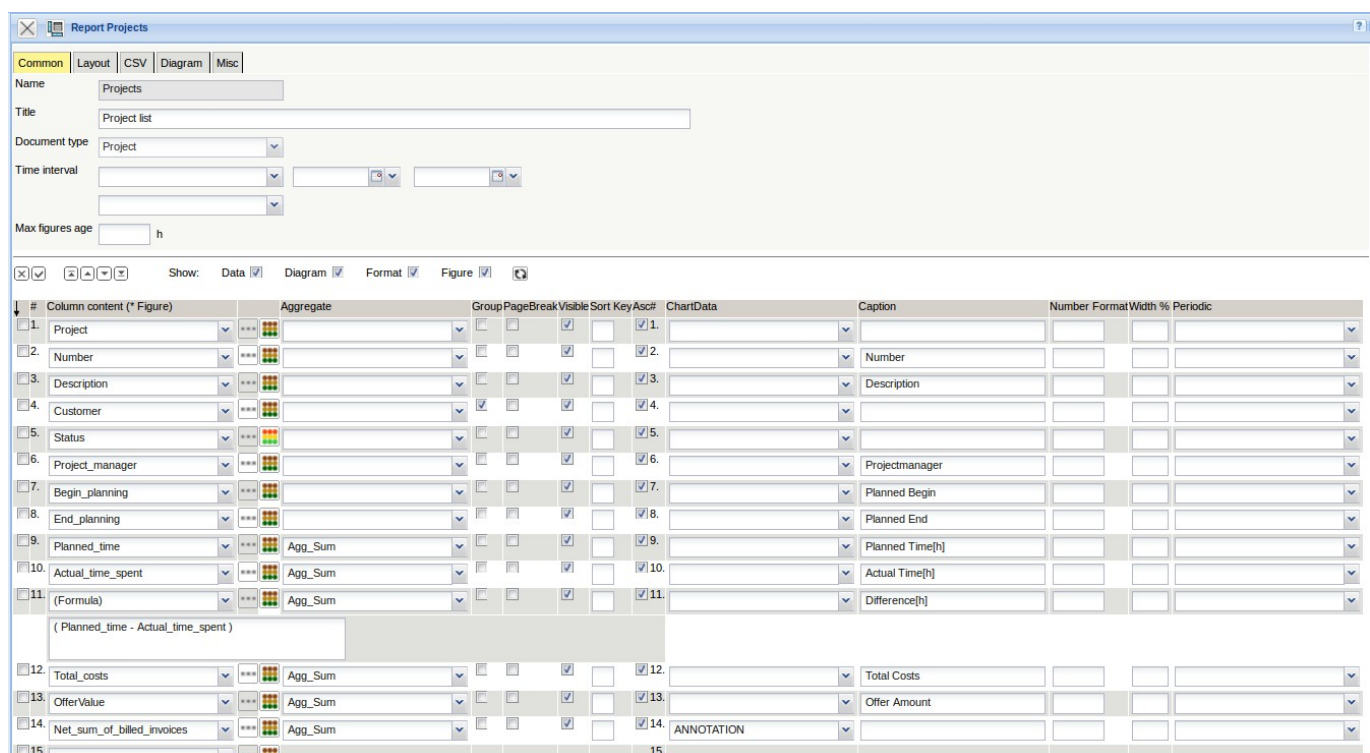
[previous](#) [Home](#) [next](#)

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 query is required (quick or advanced search of Projectile).



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



...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  (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.

Search

Selection

Name

Query

Lookup Document types

Document fields

Field values

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

Selection

Name

Query

Lookup Document types

Document fields

Field values

Report

Report

Format

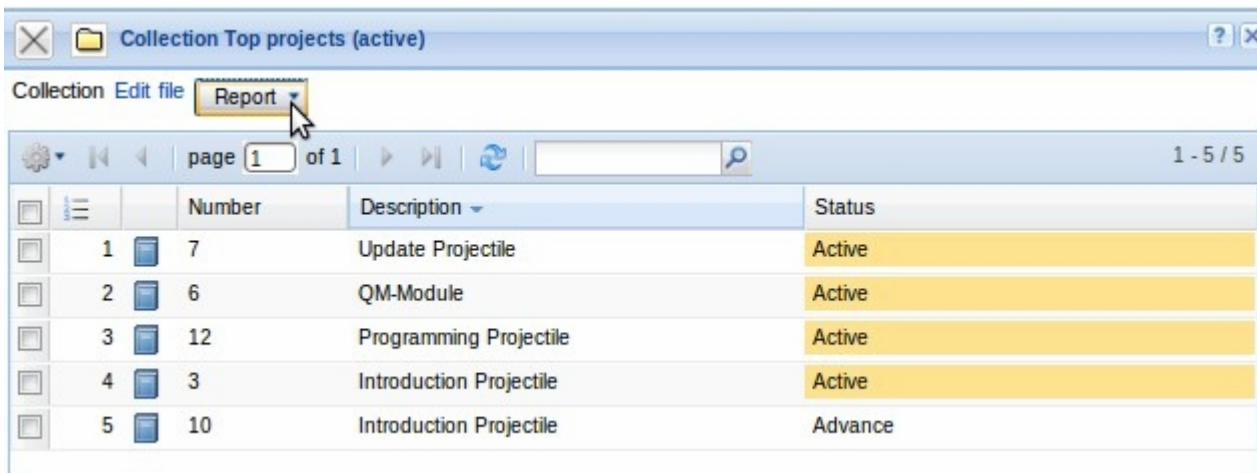
Chart period

Start

End

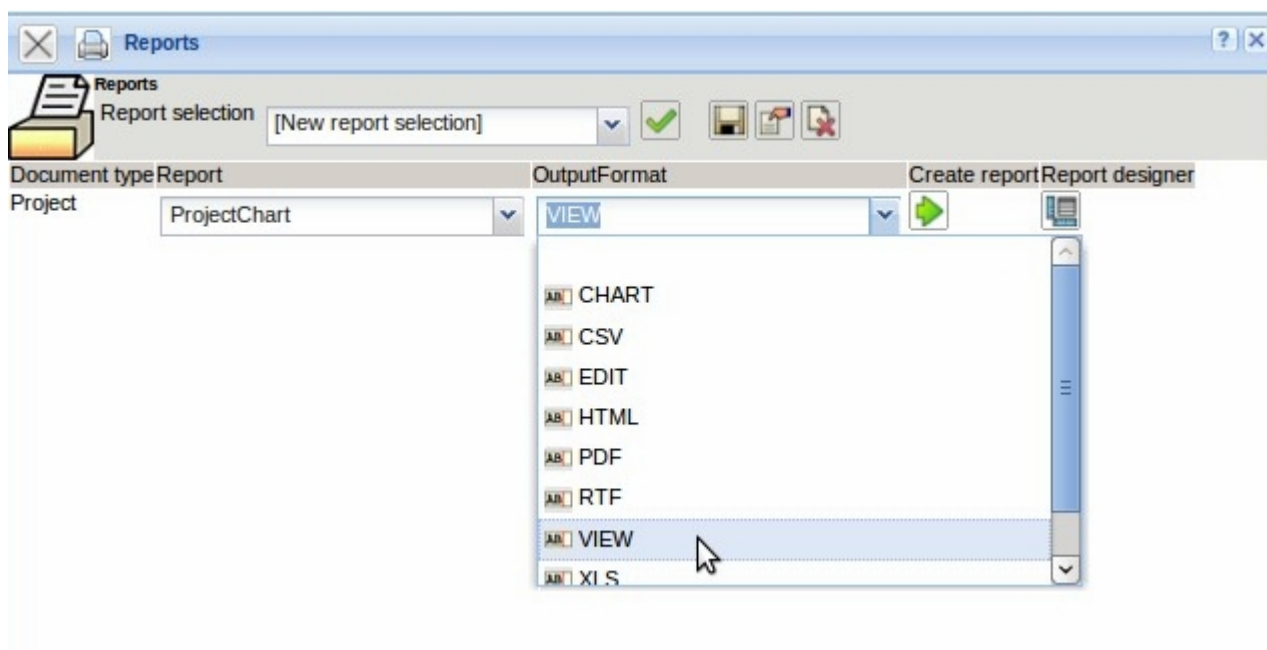
Period

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



	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

... from this multiple-selection.

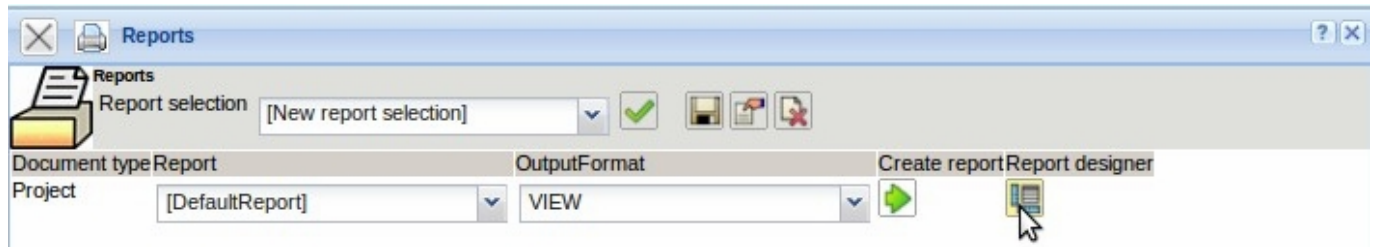


In the selection report, a standard report (a list of all available elements of the document), or (if available) a defined report can be selected. The following output format can be selected:

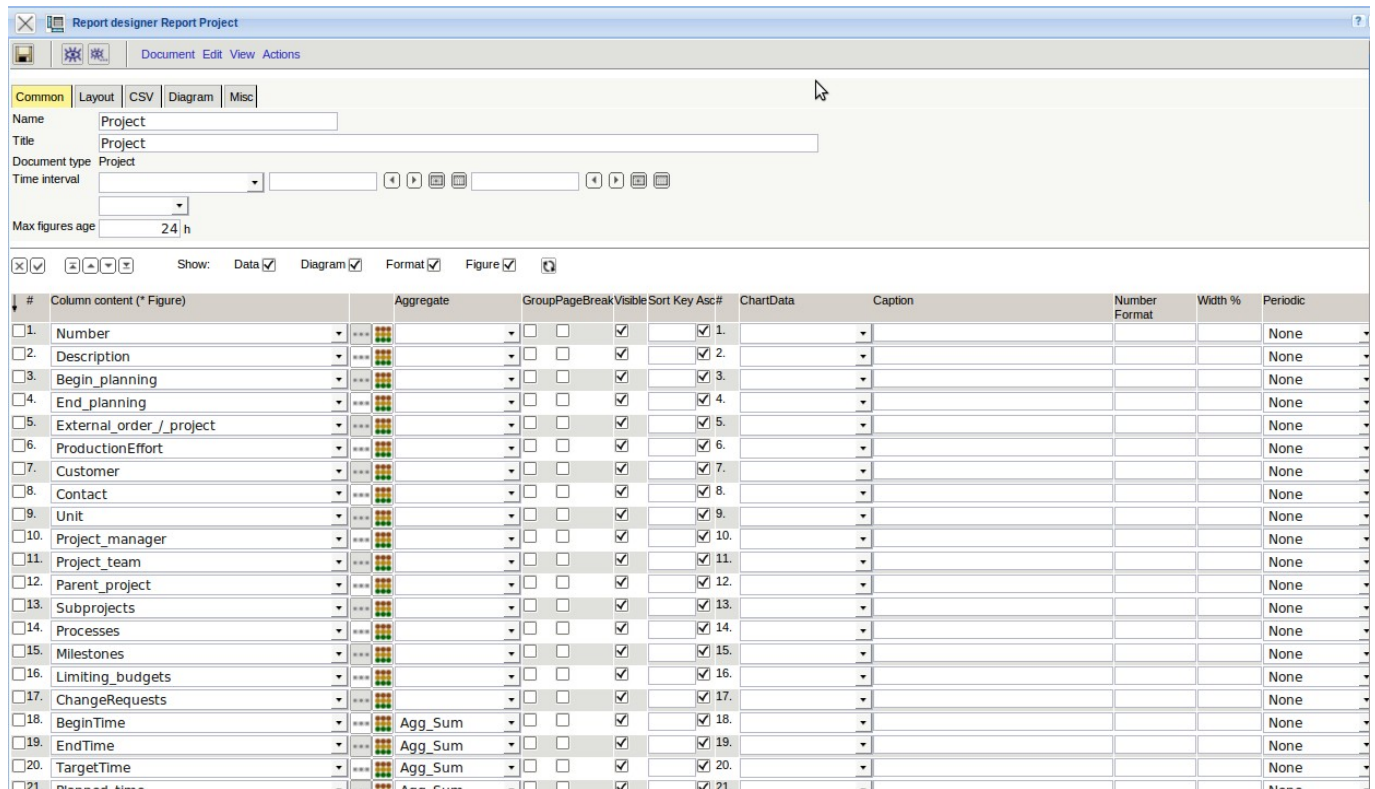
- CHART (for graphical evaluation),
- CSV (for example for MS EXCEL or for the use of standard letters),
- EDIT (to edit the selected data records),
- HTML,
- PDF,
- RTF (for example for MS WORD),
- VIEW (Evaluation within the system),
- XLS (for MS EXCEL) or
- XML

Create Reports

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



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



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) ...

Report designer Report Project

Document Edit View Actions

Common | Layout | CSV | Diagram | Misc

Name: Project

Title: Project

Document type: Project

Time interval: [dropdown] [dropdown]

Max figures age: 24 h

Show: Data [checked] Diagram [unchecked]

#	Column content (* Figure)
☒ 1.	Number
☒ 2.	Description
☒ 3.	Begin_planning
☒ 4.	End_planning
☐ 5.	External_order/_project
☐ 6.	ProductionEffort
☒ 7.	Customer
☒ 8.	Contact
☐ 9.	Unit
☐ 10.	Project_manager
☐ 11.	Project_team
☐ 12.	Parent_project
☐ 13.	Subprojects
☐ 14.	Processes
☐ 15.	Milestones

Invert [checked] content (* Figure)

... and the selected entries are deleted.

☒ ☐

 Show: ☒ Data ☒ Diagram

Remove content (* Figure)

☐ 1.	Number	▼
☐ 2.	Description	▼
☐ 3.	Begin_planning	▼
☐ 4.	End_planning	▼
☒ 5.	External_order_/_project	▼
☒ 6.	ProductionEffort	▼
☐ 7.	Customer	▼
☐ 8.	Contact	▼
☒ 9.	Unit	▼
☒ 10.	Project_manager	▼
☒ 11.	Project_team	▼
☒ 12.	Parent_project	▼
☒ 13.	Subprojects	▼
☒ 14.	Processes	▼
☒ 15.	Milestones	▼

Alternatively, the rows which are not required can, of course, also be marked and deleted.

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 designer Report Project

Document Edit View Actions

Co Save the document Diagram Misc

Name: Project short list

Title: Project overview (min)

Document type: Project

Time interval: [dropdown] [input] [left arrow] [right arrow] [refresh] [input] [left arrow] [right arrow] [refresh]

Max figures age: [dropdown] 24 h

Show: Data ☒ Diagram ☒ Format ☒ Figure ☒ [refresh]

#	Column content (* Figure)	Aggregate	GroupPageBreakVisible	Sort Key Asc	ChartData	Caption	Number Format	Width %	Periodic
1.	Number	[dropdown]	☐	☒	1.	[dropdown]			None [dropdown]
2.	Description	[dropdown]	☐	☒	2.				None [dropdown]
3.	Begin_planning	[dropdown]	☐	☒	3.	[dropdown] Planned Begin			None [dropdown]
4.	End_planning	[dropdown]	☐	☒	4.	[dropdown] Planned End			None [dropdown]
5.	Customer	[dropdown]	☐	☒	5.	[dropdown]			None [dropdown]
6.	Contact	[dropdown]	☐	☒	6.	[dropdown]			None [dropdown]
7.	OfferValue	[dropdown] Agg_Sum	☐	☒	7.	[dropdown] Offer			None [dropdown]
8.	OrderValue	[dropdown] Agg_Sum	☐	☒	8.	[dropdown] Order			None [dropdown]
9.	Total	[dropdown] Agg_Sum	☐	☒	9.				None [dropdown]

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.

The screenshot shows the 'Report Project short list' dialog box with the 'Layout' tab selected. The dialog has a menu bar with 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below the menu bar are icons for file operations and settings. The 'Layout' tab is highlighted, and the 'Common' sub-tab is active. The settings are as follows:

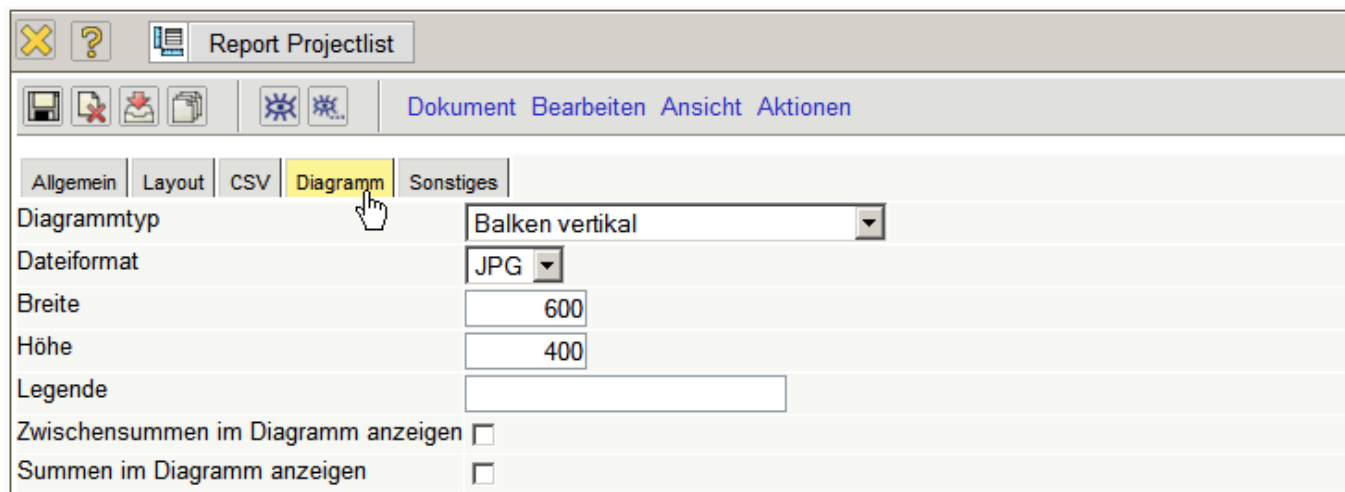
Parameter	Value
PageBreak	☐
Lines per page	80
PageCounter	☐
Show autoring information	☐
SumsOnly	☐
GroupMode	☐
ShowSubTotals	Below
ShowTotals	Below
ShowIndex	☐
ShowIdAsLink	☒
ShowHeader	☒
Report Header	[Text Field] [Icons]
Report Footer	[Text Field] [Icons]
Page Header	[Text Field] [Icons]
Page Footer	[Text Field] [Icons]
Default Font	Helvetica
Default Font Size	10
Title Font Size	12
Sums Bold	☐
Sums Italic	☒
Sums BackgroundColor	#E5E5E5 [Color Picker]
Alternative BackgroundColor	#FFF0BF [Color Picker]
Paper Size	[Dropdown]
Landscape Mode	☐
CollectionDisplay	CommaSeparated
Classic Duration Format	☐
ShowEmptyTables	☐

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

The screenshot shows the 'Report Projectlist' dialog box with the 'CSV' tab selected. The dialog has a menu bar with 'Dokument', 'Bearbeiten', 'Ansicht', and 'Aktionen'. Below the menu bar are icons for file operations and settings. The 'CSV' tab is highlighted, and the 'Allgemein' sub-tab is active. The settings are as follows:

Parameter	Value
Separator	[Text Field]
Listentrenner	[Text Field]
Zeilenumbrüche ersetzen	☐

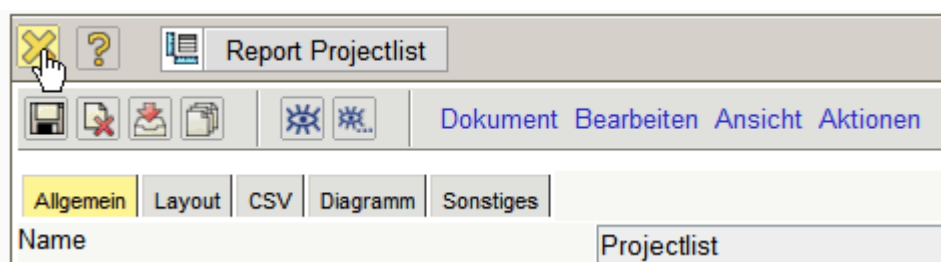
In the tap "Diagram", options for graphic evaluations can be set (explanation follows).



The screenshot shows the 'Report Projectlist' dialog box with the 'Diagramm' tab selected. The 'Diagrammtyp' is set to 'Balken vertikal'. The 'Dateiformat' is set to 'JPG'. The 'Breite' is set to '600' and the 'Höhe' is set to '400'. The 'Legende' field is empty. The checkboxes for 'Zwischensummen im Diagramm anzeigen' and 'Summen im Diagramm anzeigen' are both unchecked.

Option	Value
Diagrammtyp	Balken vertikal
Dateiformat	JPG
Breite	600
Höhe	400
Legende	
Zwischensummen im Diagramm anzeigen	☐
Summen im Diagramm anzeigen	☐

After closing of the new report ...



The screenshot shows the 'Report Projectlist' dialog box with the 'Allgemein' tab selected. The 'Name' field is set to 'Projectlist'.

Option	Value
Name	Projectlist

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

... continued

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