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3.06 Reportgenerator "ReportMaker" (Fortsetzung)

Functions of the ReportDesigner

The following example expanded functionalities of the designer are defined with the help of “project short list”.

First, a new element for the report is created by using . In the selection list 'column content', referenced elements are available, depending on the document type. In the example for the project report the document type project is selected. The element customer, which is extracted from the customer system. These links can also be used in the ReportMaker. If a field within the selection box contains “...”, the functionality  can be used to select the available elements of the linked document.

Report Project short list

Document Edit View Backreferences Actions

Common

Layout

CSV

Diagram

Misc

Name

Project short list

Title

Project overview (min)

Document type

Project

Time interval

Max figures age

24 h

Show: Data Diagram Format Figure

#	Column content (* Figure)	Aggregate	Group	PageBreak	Visible	Sort Key	Asc#	ChartData	Caption
☐ 1.	Number				☒		☒ 1.		
☐ 2.	Description				☒		☒ 2.		
☐ 3.	Begin_planning				☒		☒ 3.		Planned Begin
☐ 4.	End_planning				☒		☒ 4.		Planned End
☐ 5.	Customer				☒		☒ 5.		
☐ 6.	Contact				☒		☒ 6.		
☐ 7.	OfferValue	Agg_Sum			☒		☒ 7.		Offer
☐ 8.	OrderValue	Agg_Sum			☒		☒ 8.		Order
☐ 9.	Total	Agg_Sum			☒		☒ 9.		
☐ 10.	Customer...				☒		☒ 10.		
☐ 11.					☒		☒ 11.		
☐ 12.					☒		☒ 12.		
☐ 13.					☒		☒ 13.		
☐ 14.					☒		☒ 14.		

In the example, in addition to the customer of the projects, the associated branch is also displayed.

Report Project short list

Document Edit View Back references Actions

Common Layout CSV Diagram Misc

Name: Project short list

Title: Project overview (min)

Document type: Project

Time interval: [empty]

Max #

Customer.Branch

	Aggregate	Group	PageBreak	Visible	Sort Key	Asc#	ChartData	Caption
1.						1.		
2.						2.		
3.						3.		Planned Begin
4.						4.		Planned End
5.						5.		
6.						6.		
7.	Agg_Sum					7.		Offer
8.	Agg_Sum					8.		Order
9.	Agg_Sum					9.		
10.						10.		
11.						11.		
12.						12.		
13.						13.		
14.						14.		

Then the field can be reordered. The field is moved to the top using 'up' (several times) ...

Up

Column Up (* Figure)

1.	Number	
2.	Description	
3.	Begin_planning	
4.	End_planning	
5.	Customer	
6.	Contact	
7.	OfferValue	
8.	OrderValue	
9.	Total	
10.	Customer.Branch	

... until the desired position is reached.

By using the functionality  formulas can be used.

#	Column content (* Figure)	
☐ 1.	Number	***
☐ 2.	Description	***
☐ 3.	Begin_planning	***
☐ 4.	End_planning	***
☐ 5.	Customer	***
☒ 6.	Customer.Branch	***
☐ 7.	Contact	***
☐ 8.	OfferValue	***
☐ 9.	OrderValue	***
☐ 10.	Total	***
☐ 11.	(Formula)	***
☐ 12.		***

Then the appropriate input field is opened, in which the formula is defined.

☐ 11.	(Formula)	***

Within the formula all basic operations can be used (+,-,*,/). When defining the formulas, the correct spelling should be considered (case sensitivity as well). In the example, a new field with the name 'difference' has been created, which is evaluated from the fields panned effort - actual effort and they should be added up (aggregate function).

Report Project short list

Document Edit View Back references Actions

Save the document

Diagram

Misc

Name

Project short list

Title

Project overview (min)

Document type

Project

Time interval

Max figures age

24 h

☒

☒

☒

☒

☒

☒

Show:

☒ Data

☒ Diagram

☒ Format

☒ Figure

☒

(Planned_time - Actual_time_spent)

After saving the report, the formula for the internationalization of the report will be reformatted. The new field “difference” is then shifted two positions upward.

Report Project short list

Document

Edit

View

Back references

Actions

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Diagram

Misc

Name

Project short list

Title

Project overview (min)

Document type

Project

Time interval

Max figures age

24 h

Show:

Data

Diagram

Format

Figure

↓

#

Column

Up

Int (* Figure)

Aggregate

Group

PageBreak

Visible

Sort Key

Asc#

ChartData

Caption

1.

Number

...

1.

2.

Description

...

2.

3.

Begin_planning

...

3.

Planned Begin

4.

End_planning

...

4.

Planned End

5.

Customer

...

1

5.

6.

Customer.Branch

...

6.

7.

Contact

...

7.

8.

OfferValue

...

Agg_Sum

8.

Offer

9.

Actual_time_spent *

...

9.

Actual Time

10.

Planned_time *

...

10.

Plan Time

11.

Total

...

Agg_Sum

11.

12.

(Formula)

...

12.

Difference

(Planned_time - Actual_time_spent)

Afterwards, it is sorted and grouped by “customer”.

Report Project short list

Document Edit View Back references Actions

Save the document

Diagram Misc

Name

Project short list

Title

Project overview (min)

Document type

Project

Time interval

Max figures age

24 h

Show: Data Diagram Format Figure

#	Column content (* Figure)	Aggregate	Group	PageBreak	Visible	Sort Key	Asc#	ChartData	Caption
☐ 1.	Number		☐	☐	☒		☒ 1.		
☐ 2.	Description		☐	☐	☒		☒ 2.		
☐ 3.	Begin_planning		☐	☐	☒		☒ 3.		Planned Begin
☐ 4.	End_planning		☐	☐	☒		☒ 4.		Planned End
☐ 5.	Customer		☒	☐	☒	1	☒ 5.		
☐ 6.	Customer.Branch		☐	☐	☒		☒ 6.		
☐ 7.	Contact		☐	☐	☒		☒ 7.		
☐ 8.	OfferValue	Agg_Sum	☐	☐	☒		☒ 8.		Offer
☐ 9.	Actual_time_spent *		☐	☐	☒		☒ 9.		Actual Time
☐ 10.	Planned_time *		☐	☐	☒		☒ 10.		Plan Time
☒ 11.	(Formula)		☐	☐	☒		☒ 11.		Difference
(Planned_time - Actual_time_spent)									
☐ 12.	Total	Agg_Sum	☐	☐	☒		☒ 12.		
☐ 13.			☐	☐	☒		☒ 13.		

The example report can be directly used after saving...

Report Project short list

Document Edit View Back references Actions

Save the document

Diagram Misc

Name

Project short list

... and closing it ...

Report Project short list

Document Edit View Back references Actions

Common

Layout

CSV

Diagram

Misc

Name

Project short list

... and then displays ...

The screenshot shows a 'Reports' window with a 'Report selection' dropdown set to '[New report selection]'. Below this, there are two main sections: 'Document type Report' and 'OutputFormat'. Under 'Document type Report', the 'Project' dropdown is set to 'Project short list'. Under 'OutputFormat', the 'VIEW' dropdown is selected. To the right of these dropdowns are icons for saving, printing, and deleting, along with a 'Create report' button and a 'Report designer' icon.

... the following chart with all parent projects sorted by "customer":

The screenshot shows a 'Projectlist' window with a table titled 'Projektübersicht'. The table contains 11 columns: Nummer, Bezeichnung, Plan-Beginn, Plan-Ende, Kunde, Branche, Plan-Aufwand, Ist-Aufwand, Differenz, Angebot, and Rechnung. The data is sorted by customer, showing projects for Airbus Deutschland GmbH, BMW AG, CONSULT Holding, Jökler Software GmbH, Vattenfall Europe, and a final 'Summe' row.

Nummer	Bezeichnung	Plan-Beginn	Plan-Ende	Kunde	Branche	Plan-Aufwand	Ist-Aufwand	Differenz	Angebot	Rechnung
106	Einführung Projectile	23.10.2006	19.12.2006	Airbus Deutschland GmbH	Sonstiges	328,00	90,75	237,25	51.720,00	7.235,00
				Airbus Deutschland GmbH		328,00	90,75	237,25	51.720,00	7.235,00
BMW06	Implementation TransportManager	15.12.2005	13.05.2006	BMW AG	Automotive	272,00	102,00	170,00	38.660,00	6.494,31
BMW03	SAP Add-ons BMW	19.04.2005	12.05.2005	BMW AG	Automotive	116,00	178,75	-62,75	19.560,00	25.360,00
93	RM-Modul	02.01.2007	19.02.2007	BMW AG	Automotive	240,00	0,00	240,00	0,00	0,00
				BMW AG		628,00	280,75	347,25	58.220,00	31.854,31
CS07	Einführung Projectile	19.06.2006	09.08.2006	CONSULT Holding	Beratung	170,00	228,25	-58,25	28.320,00	29.505,51
92	QM-Modul	05.12.2006	26.01.2007	CONSULT Holding	Beratung	240,00	196,00	44,00	48.876,00	0,00
				CONSULT Holding		410,00	424,25	-14,25	77.196,00	29.505,51
100	Einführung Fibu	22.12.2006	02.02.2007	Jökler Software GmbH	Software	168,00	10,50	157,50	0,00	0,00
				Jökler Software GmbH		168,00	10,50	157,50	0,00	0,00
VF09	Einführung Projectile	13.03.2006	06.06.2006	Vattenfall Europe	Sonstiges	168,00	242,75	-74,75	0,00	0,00
DS09	Einführung Risikomanagement	16.01.2006	05.05.2006	Vattenfall Europe	Sonstiges	164,00	122,50	41,50	26.940,00	0,00
				Vattenfall Europe		332,00	365,25	-33,25	26.940,00	0,00
				Summe		1.866,00	1.171,50	694,50	214.076,00	68.594,82

... continued

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