

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

# 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

CommonLayoutCSVDiagramMisc

NameProject short list

TitleProject overview (min)

Document typeProject

Time interval

Max figures age24 h

Show: DataDiagramFormatFigure

| #                            | Column content (* Figure) | Aggregate | Group | PageBreak | Visible                             | Sort Key | Asc#                                    | ChartData | Caption       |
|------------------------------|---------------------------|-----------|-------|-----------|-------------------------------------|----------|-----------------------------------------|-----------|---------------|
| <input type="checkbox"/> 1.  | Number                    |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 1.  |           |               |
| <input type="checkbox"/> 2.  | Description               |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 2.  |           |               |
| <input type="checkbox"/> 3.  | Begin_planning            |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 3.  |           | Planned Begin |
| <input type="checkbox"/> 4.  | End_planning              |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 4.  |           | Planned End   |
| <input type="checkbox"/> 5.  | Customer                  |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 5.  |           |               |
| <input type="checkbox"/> 6.  | Contact                   |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 6.  |           |               |
| <input type="checkbox"/> 7.  | OfferValue                | Agg_Sum   |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 7.  |           | Offer         |
| <input type="checkbox"/> 8.  | OrderValue                | Agg_Sum   |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 8.  |           | Order         |
| <input type="checkbox"/> 9.  | Total                     | Agg_Sum   |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 9.  |           |               |
| <input type="checkbox"/> 10. | Customer...               |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 10. |           |               |
| <input type="checkbox"/> 11. |                           |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 11. |           |               |
| <input type="checkbox"/> 12. |                           |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 12. |           |               |
| <input type="checkbox"/> 13. |                           |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 13. |           |               |
| <input type="checkbox"/> 14. |                           |           |       |           | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 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 | Down | Left | Right |
|-----|-----------------|----|------|------|-------|
| 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) |     |  |
|----------------------------------------|---------------------------|-----|--|
| <input type="checkbox"/> 1.            | Number                    | ... |  |
| <input type="checkbox"/> 2.            | Description               | ... |  |
| <input type="checkbox"/> 3.            | Begin_planning            | ... |  |
| <input type="checkbox"/> 4.            | End_planning              | ... |  |
| <input type="checkbox"/> 5.            | Customer                  | ... |  |
| <input checked="" type="checkbox"/> 6. | Customer.Branch           | ... |  |
| <input type="checkbox"/> 7.            | Contact                   | ... |  |
| <input type="checkbox"/> 8.            | OfferValue                | ... |  |
| <input type="checkbox"/> 9.            | OrderValue                | ... |  |
| <input type="checkbox"/> 10.           | Total                     | ... |  |
| <input type="checkbox"/> 11.           | (Formula)                 | ... |  |
| <input type="checkbox"/> 12.           |                           | ... |  |

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

|                              |           |     |  |
|------------------------------|-----------|-----|--|
| <input type="checkbox"/> 11. | (Formula) | ... |  |
| <div></div>                  |           |     |  |

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 ☒

| #                            | Column content (* Figure) | Aggregate | Group                               | PageBreak | Visible                             | Sort | Asc#                                    | ChartData | Caption       |
|------------------------------|---------------------------|-----------|-------------------------------------|-----------|-------------------------------------|------|-----------------------------------------|-----------|---------------|
| <input type="checkbox"/> 1.  | Number                    |           |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 1.  |           |               |
| <input type="checkbox"/> 2.  | Description               |           |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 2.  |           |               |
| <input type="checkbox"/> 3.  | Begin_planning            |           |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 3.  |           | Planned Begin |
| <input type="checkbox"/> 4.  | End_planning              |           |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 4.  |           | Planned End   |
| <input type="checkbox"/> 5.  | Customer                  |           | <input checked="" type="checkbox"/> |           | <input checked="" type="checkbox"/> | 1    | <input checked="" type="checkbox"/> 5.  |           |               |
| <input type="checkbox"/> 6.  | Customer.Branch           |           |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 6.  |           |               |
| <input type="checkbox"/> 7.  | Contact                   |           |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 7.  |           |               |
| <input type="checkbox"/> 8.  | OfferValue                | Agg_Sum   |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 8.  |           | Offer         |
| <input type="checkbox"/> 9.  | Actual_time_spent *       |           |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 9.  |           | Actual Time   |
| <input type="checkbox"/> 10. | Planned_time *            |           |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 10. |           | Plan Time     |
| <input type="checkbox"/> 11. | Total                     | Agg_Sum   |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 11. |           |               |
| <input type="checkbox"/> 12. | (Formula)                 |           |                                     |           | <input checked="" type="checkbox"/> |      | <input checked="" type="checkbox"/> 12. |           | Difference    |

(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 one position upward.

**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: [Dropdown] [Input] [Icons] [Input] [Icons]  
Max figures age: 24 h

Show: Data ☒ Diagram ☒ Format ☒ Figure ☒

| #                                       | Column              | Unit (* Figure) | Aggregate       | Group      | PageBreak                           | Visible                  | Sort Key                              | Asc#                                    | ChartData  | Caption       |
|-----------------------------------------|---------------------|-----------------|-----------------|------------|-------------------------------------|--------------------------|---------------------------------------|-----------------------------------------|------------|---------------|
| 1.                                      | Number              | [Dropdown]      | [Icons]         | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 1.  | [Dropdown] |               |
| 2.                                      | Description         | [Dropdown]      | [Icons]         | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 2.  | [Dropdown] |               |
| 3.                                      | Begin_planning      | [Dropdown]      | [Icons]         | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 3.  | [Dropdown] | Planned Begin |
| 4.                                      | End_planning        | [Dropdown]      | [Icons]         | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 4.  | [Dropdown] | Planned End   |
| 5.                                      | Customer            | [Dropdown]      | [Icons]         | [Dropdown] | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> 1 | <input checked="" type="checkbox"/> 5.  | [Dropdown] |               |
| 6.                                      | Customer.Branch     | [Dropdown]      | [Icons]         | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 6.  | [Dropdown] |               |
| 7.                                      | Contact             | [Dropdown]      | [Icons]         | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 7.  | [Dropdown] |               |
| 8.                                      | OfferValue          | [Dropdown]      | [Icons] Agg_Sum | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 8.  | [Dropdown] | Offer         |
| 9.                                      | Actual_time_spent * | [Dropdown]      | [Icons]         | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 9.  | [Dropdown] | Actual Time   |
| 10.                                     | Planned_time *      | [Dropdown]      | [Icons]         | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 10. | [Dropdown] | Plan Time     |
| 11.                                     | Total               | [Dropdown]      | [Icons] Agg_Sum | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 11. | [Dropdown] |               |
| <input checked="" type="checkbox"/> 12. | (Formula)           | [Dropdown]      | [Icons]         | [Dropdown] | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/> 12. | [Dropdown] | 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       |
|-----------------------------------------|------------------------------------|-----------|-------------------------------------|--------------------------|-------------------------------------|----------|-----------------------------------------|-----------|---------------|
| <input type="checkbox"/> 1.             | Number                             |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 1.  |           |               |
| <input type="checkbox"/> 2.             | Description                        |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 2.  |           |               |
| <input type="checkbox"/> 3.             | Begin_planning                     |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 3.  |           | Planned Begin |
| <input type="checkbox"/> 4.             | End_planning                       |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 4.  |           | Planned End   |
| <input type="checkbox"/> 5.             | Customer                           |           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 1        | <input checked="" type="checkbox"/> 5.  |           |               |
| <input type="checkbox"/> 6.             | Customer.Branch                    |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 6.  |           |               |
| <input type="checkbox"/> 7.             | Contact                            |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 7.  |           |               |
| <input type="checkbox"/> 8.             | OfferValue                         | Agg_Sum   | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 8.  |           | Offer         |
| <input type="checkbox"/> 9.             | Actual_time_spent *                |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 9.  |           | Actual Time   |
| <input type="checkbox"/> 10.            | Planned_time *                     |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 10. |           | Plan Time     |
| <input checked="" type="checkbox"/> 11. | (Formula)                          |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 11. |           | Difference    |
|                                         | (Planned_time - Actual_time_spent) |           |                                     |                          |                                     |          |                                         |           |               |
| <input type="checkbox"/> 12.            | Total                              | Agg_Sum   | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 12. |           |               |
| <input type="checkbox"/> 13.            |                                    |           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> 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 ...

×

Print

Reports

Reports

Report selection

[New report selection]

✓

📄

📄

✖

Document type

Report

OutputFormat

Create report

Report designer

Project

Project short list

VIEW

➡

📄

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

×

Project short list

?

×

Project overview (min)

| Number | Description                   | Planned Begin | Planned End | Customer                           | Branch            | Contact         | Offer  | Actual Time | Plan Time | Difference | Total |
|--------|-------------------------------|---------------|-------------|------------------------------------|-------------------|-----------------|--------|-------------|-----------|------------|-------|
| 17     | Implementation Projectile 3.2 | 07.12.2009    | 31.12.2009  |                                    |                   |                 | 0,00   | 0,00        | 0,00      | 0,00       |       |
|        |                               |               |             | Sum                                |                   |                 | 0,00   |             |           |            | 0,00  |
| 10     | Introduction Projectile       | 04.11.2009    | 11.11.2009  | John Green Ltd.                    | Software          |                 | 0,00   | 3,50        | 0,00      | -3,50      |       |
| 12     | Programming Projectile        | 30.11.2009    | 09.12.2009  | John Green Ltd.                    | Software          |                 | 0,00   | 16,42       | 50,00     | 33,58      | 0,00  |
|        |                               |               |             | John Green Ltd.                    |                   |                 | 0,00   |             |           |            | 0,00  |
| 3      | Introduction Projectile       | 09.06.2009    | 31.12.2009  | TLC Telecommunications Corporation | Telecommunication | Williams George | 105,60 | 197,17      | 187,50    | -9,67      | 0,00  |
| 6      | QM-Module                     | 15.08.2009    | 16.10.2009  | TLC Telecommunications Corporation | Telecommunication | Williams George | 0,00   | 0,00        | 8,00      | 8,00       |       |
| 7      | Update Projectile             | 16.10.2009    | 30.11.2009  | TLC Telecommunications Corporation | Telecommunication | Williams George | 0,00   | 0,00        | 8,00      | 8,00       |       |
| 16     | Planning                      | 09.06.2009    | 30.11.2009  | TLC Telecommunications Corporation | Telecommunication | Williams George | 0,00   | 0,00        | 0,00      | 0,00       |       |
|        |                               |               |             | TLC Telecommunications Corporation |                   |                 | 105,60 |             |           |            | 0,00  |
|        |                               |               |             | Sum                                |                   |                 | 105,60 |             |           |            | 0,00  |

... continued

From:  
<https://infodesire.net/dokuwiki/> - Projectile-Online-Handbuch

Permanent link:  
[https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel\\_3:3.6.\\_fortsetzung\\_2&rev=1260273780](https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_3:3.6._fortsetzung_2&rev=1260273780)

Last update: 2019/10/25 14:09

