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3.06 Reportgenerator "ReportMaker" (Continued 2)

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 one position upward.

#	Column	Unit (* 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 ...

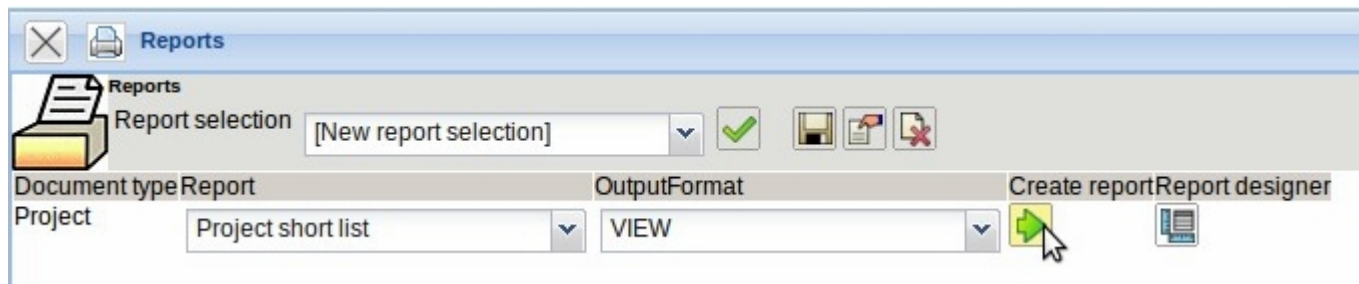
Report Project short list

Document Edit View Back references Actions

Common Layout CSV Diagram Misc

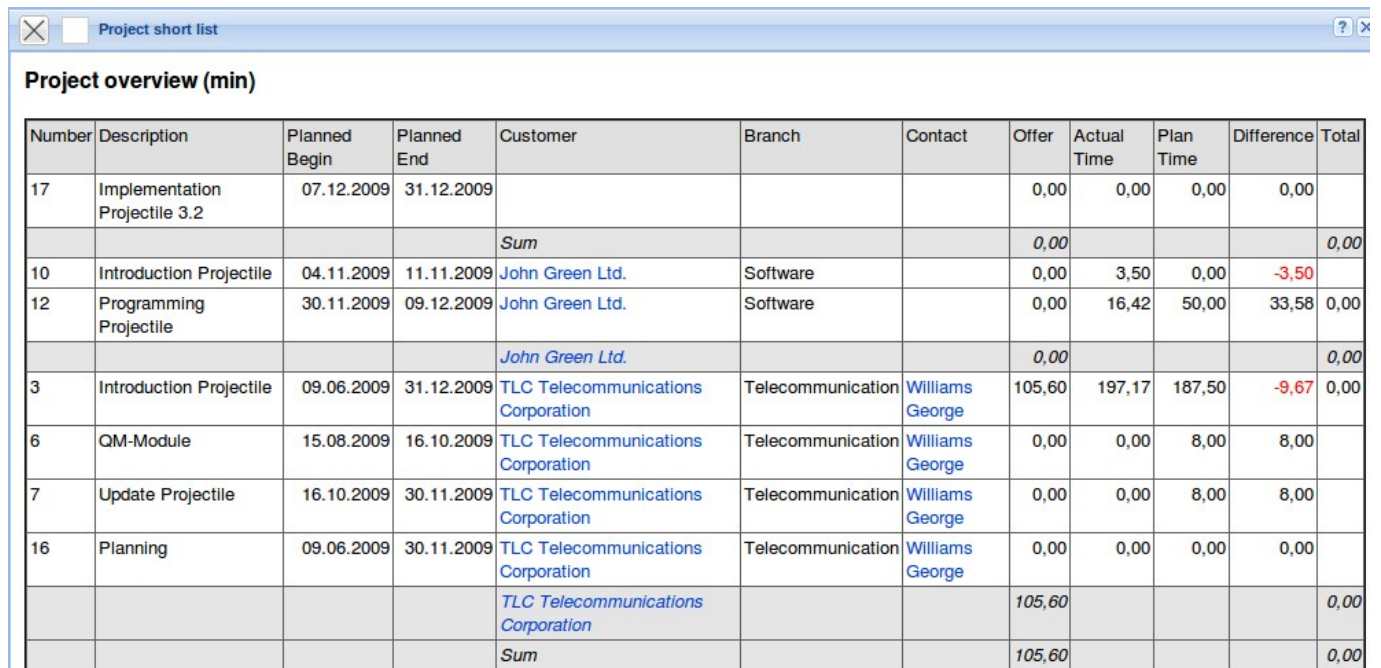
Name Project short list

... 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 'Create report' (a green arrow) and 'Report designer' (a document icon).

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



The screenshot shows a 'Project short list' window with a 'Project overview (min)' table. The table has 12 columns: Number, Description, Planned Begin, Planned End, Customer, Branch, Contact, Offer, Actual Time, Plan Time, Difference, and Total. The data is sorted by customer, showing projects for John Green Ltd. and TLC Telecommunications Corporation.

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

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