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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

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
☐ 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: [dropdown]

Max # [dropdown]

Fields list:

- Customer.Branch (selected)
- Customer.Account_Number
- Customer.Address
- Customer.Addresses
- Customer.Applikation
- Customer.Arranger
- Customer.Bank_code
- Customer.Bank_name
- Customer.BIC
- Customer.Blocked
- Customer.Campaign
- Customer.Category
- Customer.City
- Customer.Company_Formation_Year
- Customer.Company_name

	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) ...

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]

Max # [dropdown]

Fields list:

- Customer.Branch (selected)
- Customer.Account_Number
- Customer.Address
- Customer.Addresses
- Customer.Applikation
- Customer.Arranger
- Customer.Bank_code
- Customer.Bank_name
- Customer.BIC
- Customer.Blocked
- Customer.Campaign
- Customer.Category
- Customer.City
- Customer.Company_Formation_Year
- Customer.Company_name

	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.		

... until the desired position is reached.

By using the functionality [icon] 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 ☒

#	Column content (* Figure)	Aggregate	Group	PageBreak	Visible	Sort	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)

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

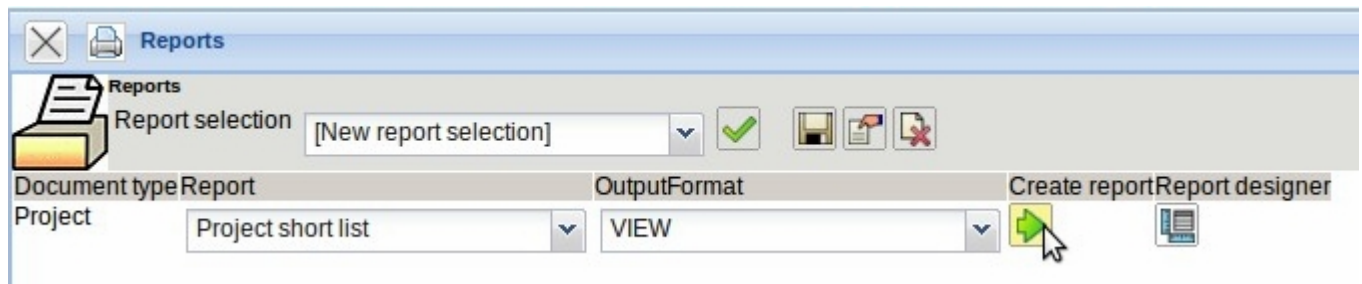
Report Project short list

Document Edit View Back references Actions

Common Layout CSV Diagram Misc

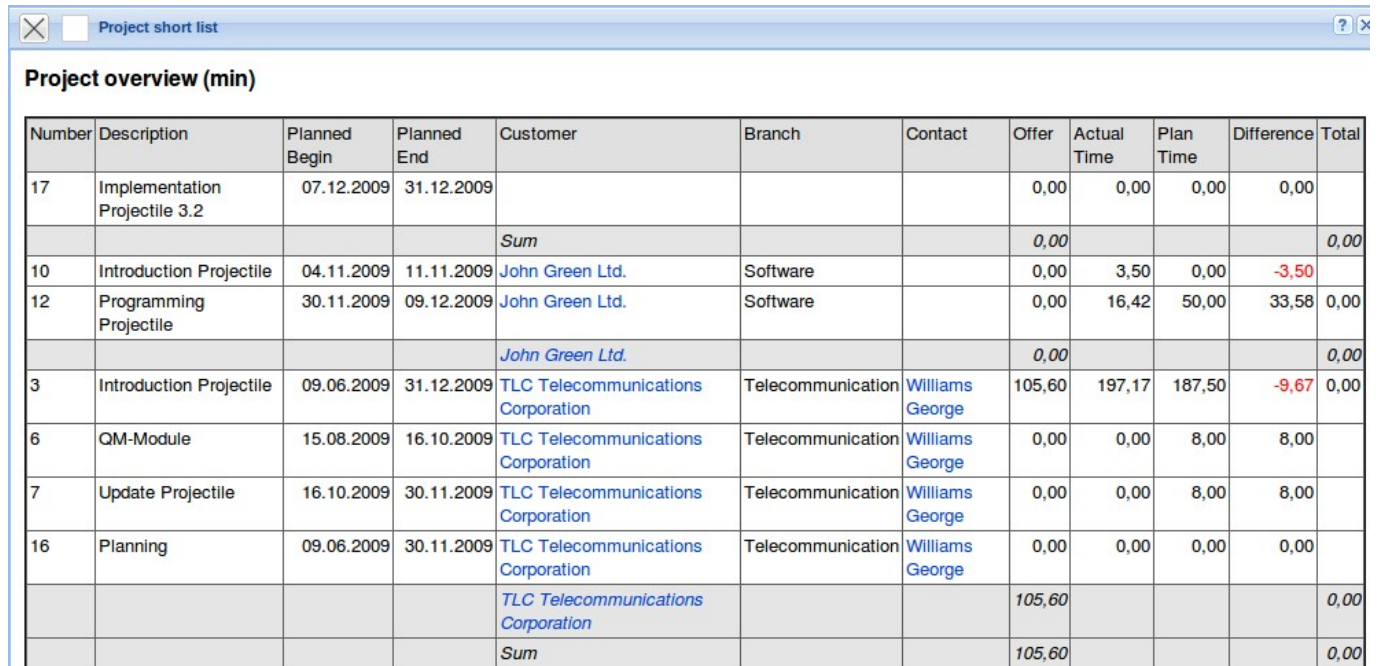
Name Project short list

... and then displays ...



The screenshot shows a window titled "Reports" with a toolbar containing icons for a folder, a document, a printer, and a magnifying glass. Below the toolbar, there is a "Report selection" dropdown menu with the text "[New report selection]". To the right of this menu are three icons: a green checkmark, a document with a magnifying glass, and a document with a red X. Below the "Report selection" menu, there are two more dropdown menus: "Document type Report" and "OutputFormat". The "Document type Report" menu is currently set to "Project", and the "OutputFormat" menu is currently set to "VIEW". To the right of these two menus is a "Create report" button with a green arrow icon and a "Report designer" button with a document icon.

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



The screenshot shows a window titled "Project short list" with a "Project overview (min)" section. Below this section is a table with 12 columns: Number, Description, Planned Begin, Planned End, Customer, Branch, Contact, Offer, Actual Time, Plan Time, Difference, and Total. The table contains data for several projects, including "Implementation Projectile 3.2", "Introduction Projectile", "Programming Projectile", "QM-Module", "Update Projectile", and "Planning". The table also includes summary rows for each customer and a grand total row at the bottom.

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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