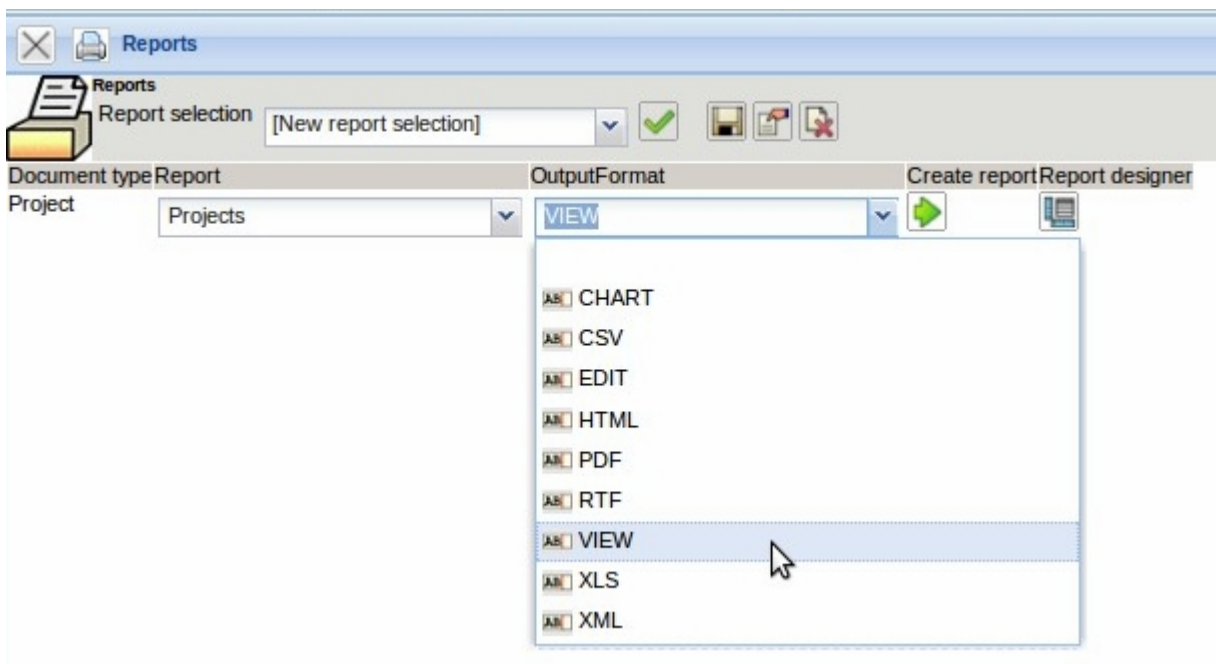


[previous](#) [Home](#) [next](#)

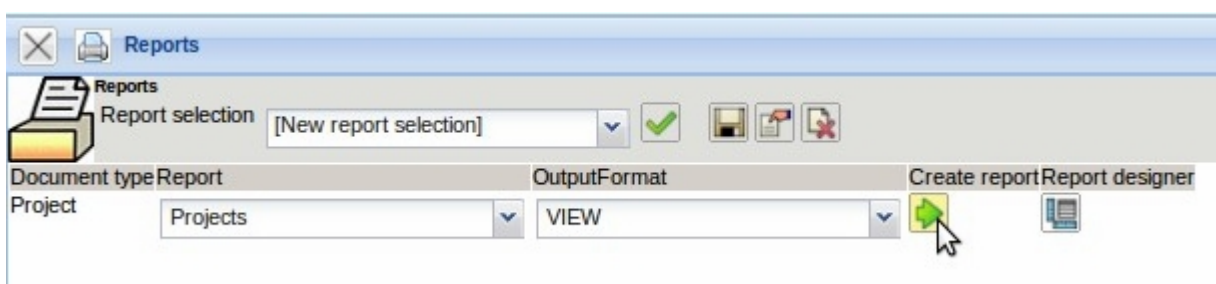
3.06 Reportgenerator "ReportMaker" (continued 1)

Generate Reports:

The ReportMaker offers a variety of formats as output options.



The option "VIEW" ...



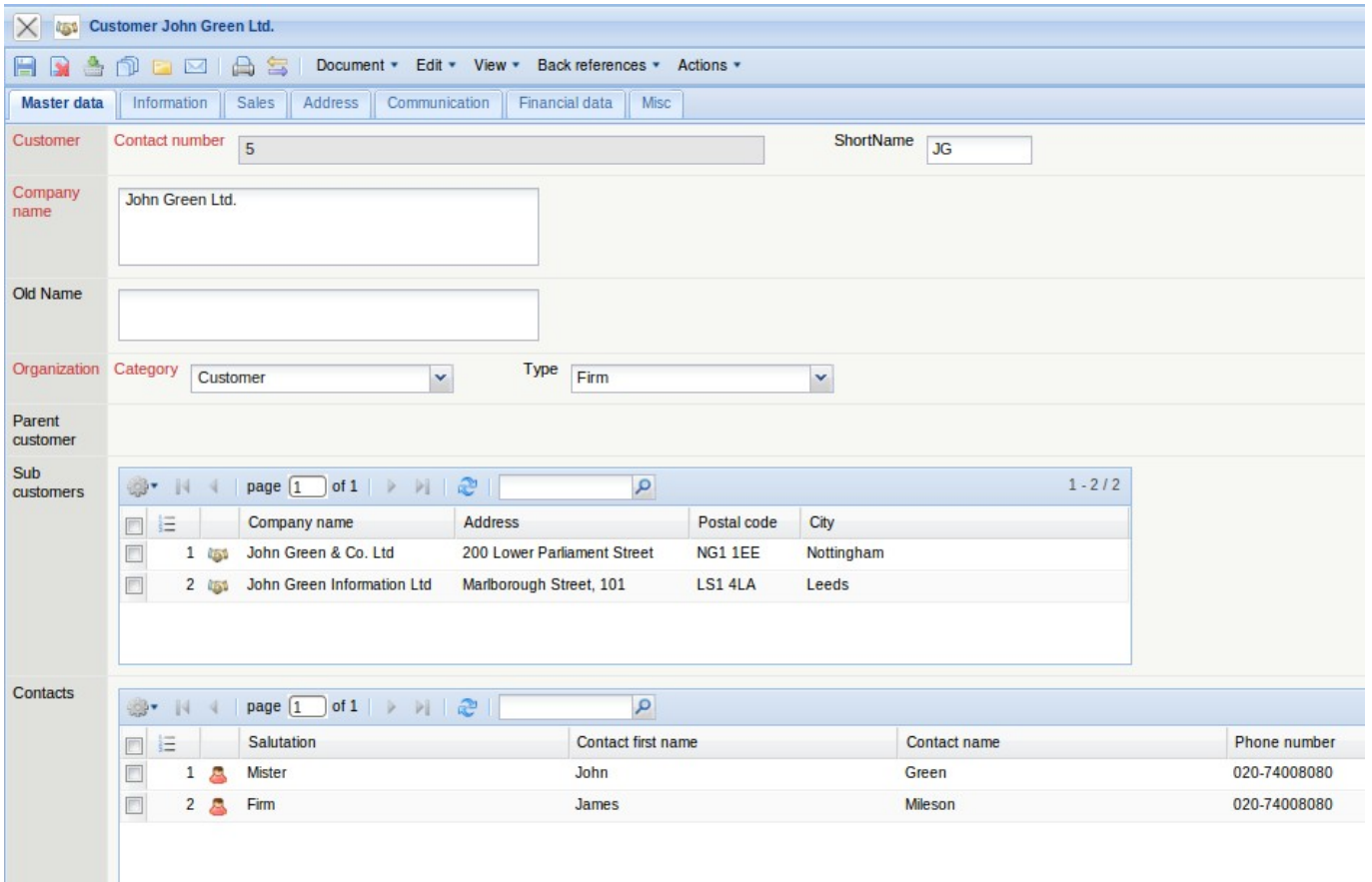
... creates the report directly in the application ...

Project	Number	Description	Customer	Status	Project manager	Planned Begin	Planned End	Planned Time[h]	Actual Time[h]	Difference[h]	Total Costs	Offer Amount	Net sum of billed invoices
3	3	Introduction Projectile	TLC Telecommunications Corporation	Active	1: Conner Jane	09.06.2009	31.12.2009	187,50	197,17	-9,67	19.242,50	105,60	9.150,00
5	6	QM-Module	TLC Telecommunications Corporation	Active	1: Conner Jane	15.08.2009	16.10.2009	8,00	0,00	8,00	360,00	0,00	0,00
6	7	Update Projectile	TLC Telecommunications Corporation	Active	1: Conner Jane	16.10.2009	30.11.2009	8,00	0,00	8,00	12.440,00	0,00	
			TLC Telecommunications Corporation					203,50	197,17	6,33	32.042,50	105,60	9.150,00
9	10	Introduction Projectile	John Green Ltd.	Advance	1: Conner Jane	04.11.2009	11.11.2009	0,00	3,50	-3,50	0,00	0,00	0,00
11	12	Programming Projectile	John Green Ltd.	Active	1: Conner Jane	30.11.2009	09.12.2009	50,00	16,42	33,58	875,00	0,00	0,00
			John Green Ltd.					50,00	19,92	30,08	875,00	0,00	0,00
15	17	Implementation Projectile 3.2		Active	1: Conner Jane	07.12.2009	31.12.2009	0,00	0,00	0,00	0,00	0	
			Sum					0,00	0,00	0,00	0,00	0	0,00
3.1.2	16	Planning	TLC Telecommunications Corporation	Active	1: Hahn Katrina	09.06.2009	30.11.2009	0,00	0,00	0,00	0,00	0	
			TLC Telecommunications Corporation					0,00	0,00	0,00	0,00	0	0,00
			Sum					253,00	217,00	36,00	32.917,50	105,00	9.150,00

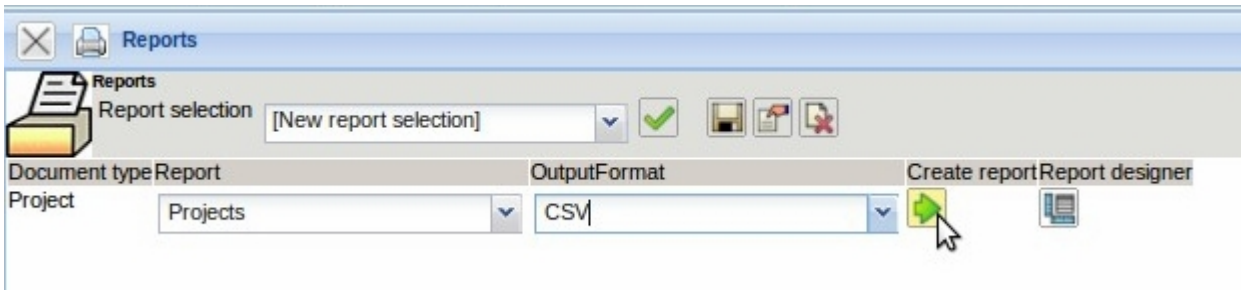
... with the possibility to link from the chart to the master data.

Project	Number	Description	Customer	Status	Project manager	Planned Begin	Planned End	Planned Time[h]	Actual Time[h]	Difference[h]	Total Costs	Offer Amount	Net sum of billed invoices
3	3	Introduction Projectile	TLC Telecommunications Corporation	Active	1: Conner Jane	09.06.2009	31.12.2009	187,50	197,17	-9,67	19.242,50	105,60	9.150,00
5	6	QM-Module	TLC Telecommunications Corporation	Active	1: Conner Jane	15.08.2009	16.10.2009	8,00	0,00	8,00	360,00	0,00	0,00
6	7	Update Projectile	TLC Telecommunications Corporation	Active	1: Conner Jane	16.10.2009	30.11.2009	8,00	0,00	8,00	12.440,00	0,00	
			TLC Telecommunications Corporation					203,50	197,17	6,33	32.042,50	105,60	9.150,00
9	10	Introduction Projectile	John Green Ltd.	Advance	1: Conner Jane	04.11.2009	11.11.2009	0,00	3,50	-3,50	0,00	0,00	0,00
11	12	Programming Projectile	John Green Ltd.	Active	1: Conner Jane	30.11.2009	09.12.2009	50,00	16,42	33,58	875,00	0,00	0,00
			John Green Ltd.					50,00	19,92	30,08	875,00	0,00	0,00
15	17	Implementation Projectile 3.2		Active	1: Conner Jane	07.12.2009	31.12.2009	0,00	0,00	0,00	0,00	0	
			Sum					0,00	0,00	0,00	0,00	0	0,00
3.1.2	16	Planning	TLC Telecommunications Corporation	Active	1: Hahn Katrina	09.06.2009	30.11.2009	0,00	0,00	0,00	0,00	0	
			TLC Telecommunications Corporation					0,00	0,00	0,00	0,00	0	0,00
			Sum					253,00	217,00	36,00	32.917,50	105,00	9.150,00

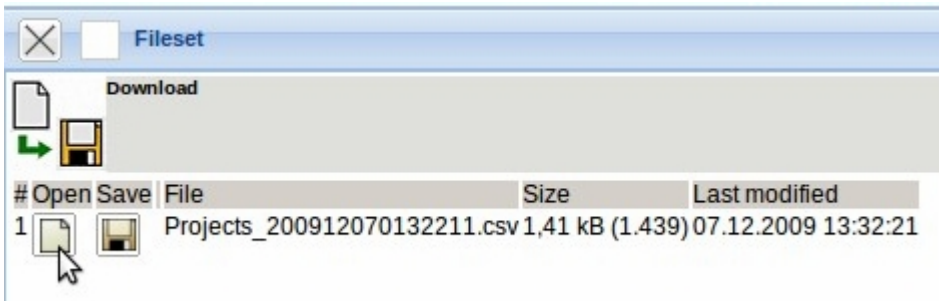
This functionality is, of course, completely subject to the authorization system, which means, a link is only created for records with the appropriate authorization (more information about the authorization system in the administration guide).



Another output option is "CSV". This output format is mostly used for spreadsheets (e.g. MS Excel) and standard letter functionality (data source for standard letters).



In the following dialog, the generated file can either be saved locally ...



...or can be opened directly.

Project	Number	Description	Customer	Status	Project manager	Planned Begin	Planned End	Planned Time[h]	Actual Time[h]
3	3	Introduction Projectile	TLC Telecommunications Corporation	Active	1: Conner Jane	09.06.09	31.12.09	187	50
5	5	6 QM-Module	TLC Telecommunications Corporation	Active	1: Conner Jane	15.08.09	16.10.09	8	0
6	6	7 Update Projectile	TLC Telecommunications Corporation	Active	1: Conner Jane	16.10.09	30.11.09	8	0
			TLC Telecommunications Corporation					203	50
9	9	10 Introduction Projectile	John Green Ltd.	Advance	1: Conner Jane	04.11.09	11.11.09	0	0
11	11	12 Programming Projectile	John Green Ltd.	Active	1: Conner Jane	30.11.09	09.12.09	50	0
			John Green Ltd.					50	0
15	15	17 Implementation Projectile 3.2		Active	1: Conner Jane	07.12.09	31.12.09	0	0
			Sum					0	0
03.01.02	16	Planning	TLC Telecommunications Corporation	Active	1: Hahn Katrina	09.06.09	30.11.09	0	0
			TLC Telecommunications Corporation					0	0
			Sum					253	0

Further output options are “PDF”, ...

Nr	Description	Customer	Status	Planned Begin	Planned End	Planned Time[h]	Actual Time[h]	Total Costs	Billed Invoices
4	Customizing CRM System		Active	20.09.2009	31.10.2009	115,00	21,50	4.025,00	0,00
		Sum				115,00	21,50	4.025,00	0,00
3	Introduction Projectile	TLC Telecommunications Corporation	Active	09.06.2009	31.12.2009	188,50	210,67	18.637,50	19.302,50
6	QM-Module	TLC Telecommunications Corporation	Active	15.08.2009	31.12.2009	38,00	224,50	1.885,44	0,00
7	Update Projectile	TLC Telecommunications Corporation	Active	16.10.2009	30.11.2009	108,00	16,00	17.940,00	
		TLC Telecommunications Corporation				334,50	451,17	38.462,94	19.302,50
12	Programming Projectile	John Green Ltd.	Active	30.11.2009	09.12.2009	50,00	42,42	2.750,00	0,00
		John Green Ltd.				50,00	42,42	2.750,00	0,00
		Sum				499,50	515,08	45.237,94	19.302,50

... “RTF”, ...

The screenshot shows the OpenOffice.org Writer window with a document titled 'Projects_201001041250471.rtf (schreibgeschützt)'. The main content is a table titled 'Project list' with the following data:

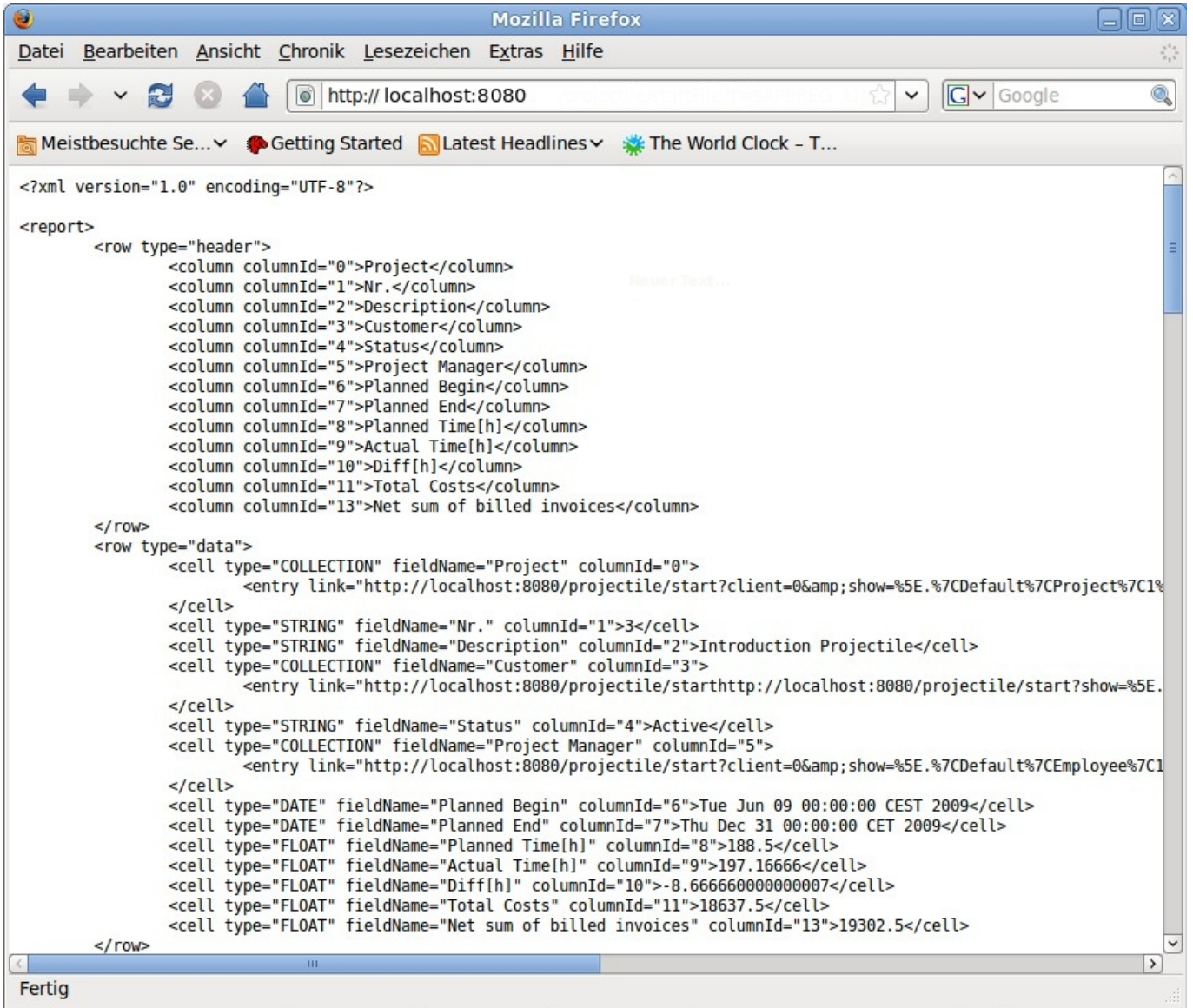
Nr	Description	Customer	Status	Planned Begin	Planned End	Planned Time[h]	Actual Time[h]	Total Costs	Billed Invoices
4	Customizing CRM System		Active	20.09.2009	31.10.2009	115,00	21,50	4.025,00	0,00
		Sum				115,00	21,50	4.025,00	0,00
3	Introduction Projectile	TLC Telecommunications Corporation	Active	09.06.2009	31.12.2009	188,50	210,67	18.637,50	19.302,50
6	QM-Module	TLC Telecommunications Corporation	Active	15.08.2009	31.12.2009	38,00	224,50	1.885,44	0,00
7	Update Projectile	TLC Telecommunications Corporation	Active	16.10.2009	30.11.2009	108,00	16,00	17.940,00	
		TLC Telecommunications Corporation				334,50	451,17	38.462,94	19.302,50
12	Programming Projectile	John Green Ltd.	Active	30.11.2009	09.12.2009	50,00	42,42	2.750,00	0,00
		John Green Ltd.				50,00	42,42	2.750,00	0,00
		Sum				499,50	515,08	45.237,94	19.302,50

... "XLS" (for MS EXCEL) and ...

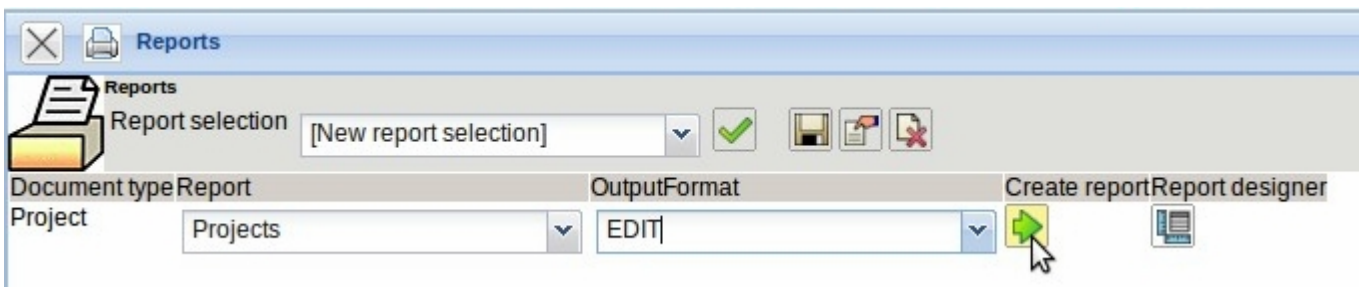
The screenshot shows the OpenOffice.org Calc window with a spreadsheet titled 'Projects_200912180506091.xls (schreibgeschützt)'. The spreadsheet contains a detailed project list with columns for Project, Nr., Description, Customer, Status, Project Manager, Planned Begin, Planned End, Planned Time[h], Actual Time[h], Diff[h], Total Costs, and Net sum of billed invoices. The data is as follows:

Project	Nr.	Description	Customer	Status	Project Manager	Planned Begin	Planned End	Planned Time[h]	Actual Time[h]	Diff[h]	Total Costs	Net sum of billed invoices
3	3	Introduction Projectile	TLC Telecomm	Active	1: Conner Jane	09.06.2009 00:00	31.12.2009 00:00	188,5	197,17	-8,67	18637,5	19302,5
4	4	Customizing CRM Sys	TLC Telecomm	Active	1: Hahn Katrina	20.09.2009 00:00	31.10.2009 00:00	80	0	80	2800	0
		Sum						80	0	80	2800	0
6	6	QM-Module	TLC Telecomm	Active	1: Conner Jane	15.08.2009 00:00	31.12.2009 00:00	38	143	-105	1885,44	0
7	7	Update Projectile	TLC Telecomm	Active	1: Conner Jane	16.10.2009 00:00	30.11.2009 00:00	108	0	108	17940	0
			TLC Telecomm					146	143	3	19825,44	0
10	10	Introduction Projectile	John Green Ltd.	Advance	1: Conner Jane	04.11.2009 00:00	11.11.2009 00:00	30	3,5	26,5	2250	0
11	11	Programming Projectile	John Green Ltd.	Active	1: Conner Jane	30.11.2009 00:00	09.12.2009 00:00	50	21,42	28,58	2750	0
			John Green Ltd.					80	24,92	55,08	5000	0
			Sum					494,5	365,08	129,42	46262,94	19302,5

... XML.



In the ReportMaker information/data can also be changed. By using "EDIT", the results of the reports can ...



... be conveniently edited.

Project	Number	Description	Customer	Status
1	3	Introduction Projectile	TLC Telecommunications Corpo	Active
2	6	QM-Module	TLC Telecommunications Corpo	Active
3	7	Update Projectile	TLC Telecommunications Corpo	Active

Setting Access Rights

By default, only the user, who creates the ReportMaker, has access to the report. Each report can also be fitted with different authorizations (see also administration guide). In the following example, for the project list ...

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] [calendar] [calendar] [input] [calendar] [calendar]

Max figures age: 24 h

- Access rights
- Check document
- Reload document

... an authorization for the user group...

STATIC_ACCESS_RIGHTS

Report Project short list

Owner: Conner Jane

Relatives: [dropdown]

Friends: [dropdown]

Other users: [dropdown]

All rights

Full

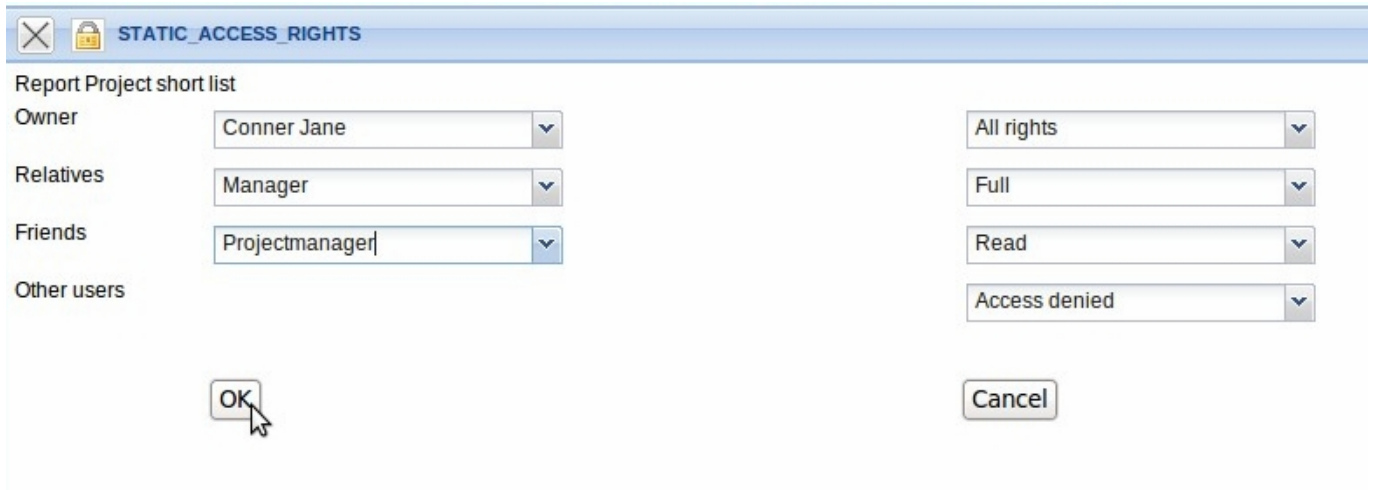
Read

Access denied

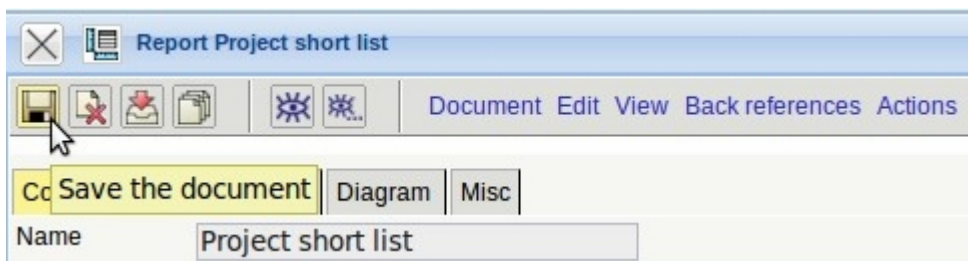
OK Cancel

... manager and project manager is assigned. All the other groups (with the exception of the owners)

do not have access to this report.



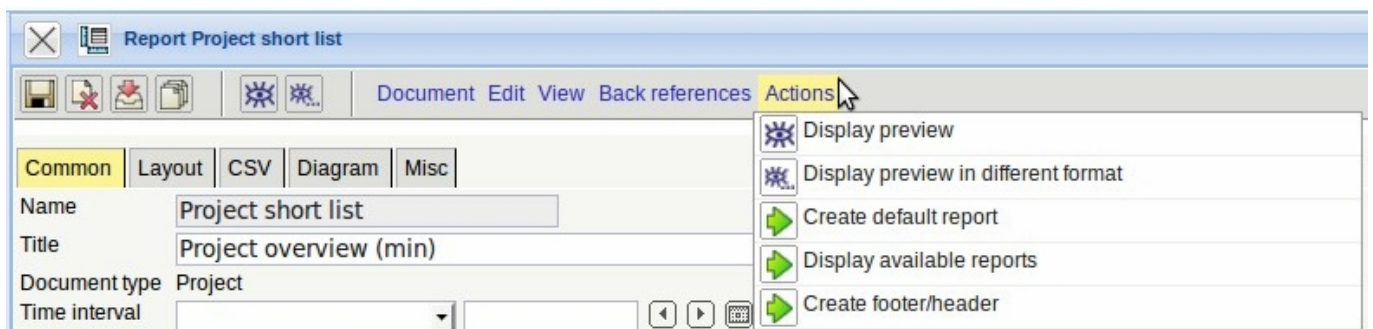
Note: The change of the authorization is only active after saving the document.



Actions in the ReportDesigner

The report includes five actions. The actions “Display preview” and “Display preview in different format” create a report directly from the designer, if the designer is accessed from a result list. The action “create default report” sets your own report back to the original configuration (it lists all the elements of the document) and the action “Display available reports” displays all reports of the selected document type (here employee).

The action “create headers/footers” allows the assigning headers and footers for the generated reports. These elements can include logos, headers and formatting information, and can be currently created exclusively by the owner.



... continued page 2

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