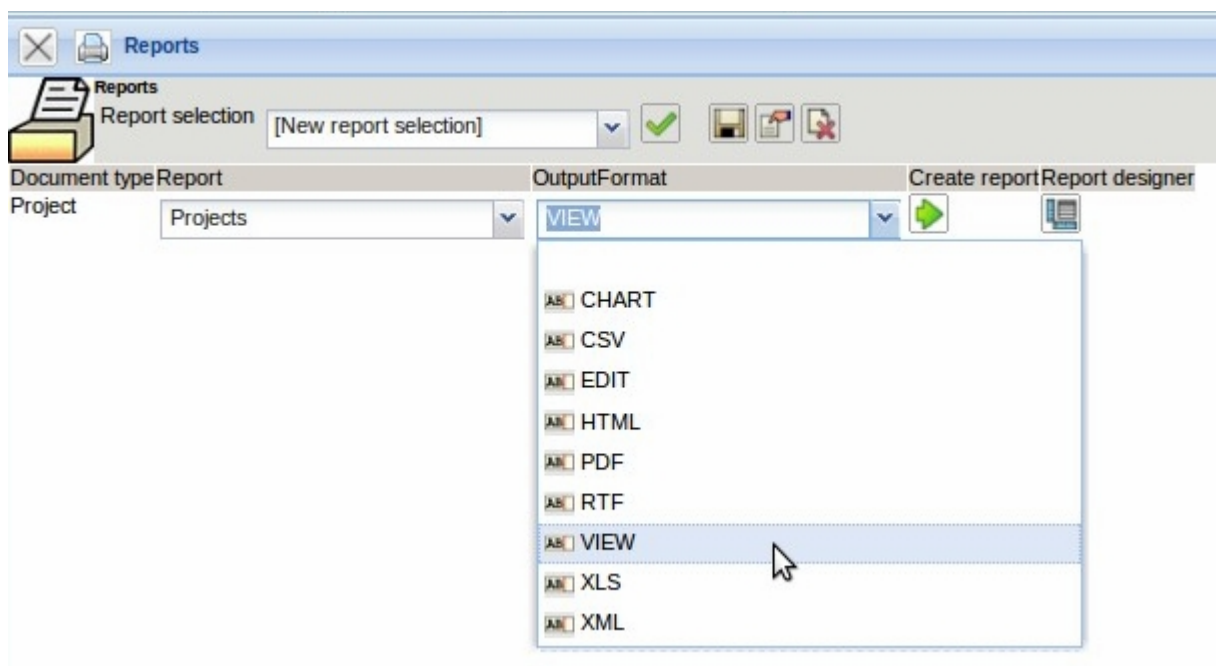


[previous](#) [Home](#) [next](#)

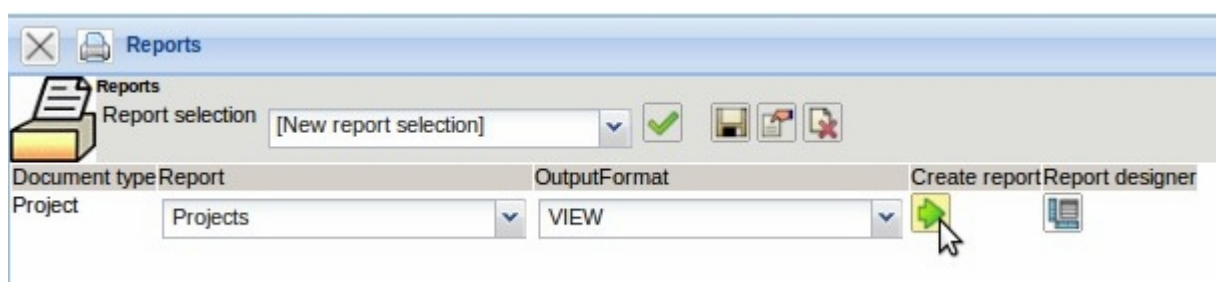
## 3.06 Reportgenerator "ReportMaker" (Continued Page 2)

### Generate Reports:

The ReportMaker offers a variety of formats as output options.



The option "VIEW" ...



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

| Projects     |        |                               |                                    |         |                 |               |             |                 |                |               |             |              |                            |
|--------------|--------|-------------------------------|------------------------------------|---------|-----------------|---------------|-------------|-----------------|----------------|---------------|-------------|--------------|----------------------------|
| Project list |        |                               |                                    |         |                 |               |             |                 |                |               |             |              |                            |
| 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.

| Projects     |        |                               |                                    |         |                 |               |             |                 |                |               |             |              |                            |
|--------------|--------|-------------------------------|------------------------------------|---------|-----------------|---------------|-------------|-----------------|----------------|---------------|-------------|--------------|----------------------------|
| Project list |        |                               |                                    |         |                 |               |             |                 |                |               |             |              |                            |
| 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).

Customer John Green Ltd.

Document Edit View Back references Actions

Master data Information Sales Address Communication Financial data Misc

Customer Contact number 5 ShortName JG

Company name John Green Ltd.

Old Name

Organization Category Customer Type Firm

Parent customer

Sub customers

|   | Company name               | Address                     | Postal code | City       |
|---|----------------------------|-----------------------------|-------------|------------|
| 1 | John Green & Co. Ltd       | 200 Lower Parliament Street | NG1 1EE     | Nottingham |
| 2 | John Green Information Ltd | Marlborough Street, 101     | LS1 4LA     | Leeds      |

Contacts

|   | Salutation | Contact first name | Contact name | Phone number |
|---|------------|--------------------|--------------|--------------|
| 1 | Mister     | John               | Green        | 020-74008080 |
| 2 | Firm       | James              | Milesen      | 020-74008080 |

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).

Reports

Report selection [New report selection]

Document type Report OutputFormat CSV Create report Report designer

Project Projects

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

Fileset

Download

| # | Open | Save | File                         | Size            | Last modified       |
|---|------|------|------------------------------|-----------------|---------------------|
| 1 |      |      | Projects_200912070132211.csv | 1,41 kB (1.439) | 07.12.2009 13:32:21 |

...or can be opened directly.

Projects\_200912070132211-1.csv (schreibgeschützt) - OpenOffice.org Calc

Datei Bearbeiten Ansicht Einfügen Format Extras Daten Fenster Hilfe

D39  $f(x)$   $\Sigma$  =

|    | A            | B      | C                                | D                                  | E       | F               | G             | H           | I               | J              |
|----|--------------|--------|----------------------------------|------------------------------------|---------|-----------------|---------------|-------------|-----------------|----------------|
| 1  | Project list |        |                                  |                                    |         |                 |               |             |                 |                |
| 2  |              |        |                                  |                                    |         |                 |               |             |                 |                |
| 3  | Project      | Number | Description                      | Customer                           | Status  | Project manager | Planned Begin | Planned End | Planned Time[h] | Actual Time[h] |
| 4  |              | 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              |
| 7  |              |        |                                  | TLC Telecommunications Corporation |         |                 |               |             | 203             | 50             |
| 8  |              | 9      | 10 Introduction Projectile       | John Green Ltd.                    | Advance | 1: Conner Jane  | 04.11.09      | 11.11.09    | 0               | 0              |
| 9  |              | 11     | 12 Programming Projectile        | John Green Ltd.                    | Active  | 1: Conner Jane  | 30.11.09      | 09.12.09    | 50              | 0              |
| 10 |              |        |                                  | John Green Ltd.                    |         |                 |               |             | 50              | 0              |
| 11 |              | 15     | 17 Implementation Projectile 3.2 |                                    | Active  | 1: Conner Jane  | 07.12.09      | 31.12.09    | 0               | 0              |
| 12 |              |        | Sum                              |                                    |         |                 |               |             | 0               | 0              |
| 13 | 03.01.02     | 16     | Planning                         | TLC Telecommunications Corporation | Active  | 1: Hahn Katrina | 09.06.09      | 30.11.09    | 0               | 0              |
| 14 |              |        |                                  | TLC Telecommunications Corporation |         |                 |               |             | 0               | 0              |
| 15 |              |        |                                  | Sum                                |         |                 |               |             | 253             | 0              |
| 16 |              |        |                                  |                                    |         |                 |               |             |                 |                |
| 17 |              |        |                                  |                                    |         |                 |               |             |                 |                |

Tabelle1

Tabelle 1 / 1 Standard 100% STD Summe=0

Further output options are "PDF", ...

Adobe Reader - [Projectlist\_200701080116451.pdf]

Datei Bearbeiten Anzeige Dokument Werkzeuge Fenster Hilfe

Kopie speichern Suchen Auswählen 100% Hilfe Suche im Web Adobe Reader 7.0

Projektübersicht

| Nummer | Bezeichnung                     | Plan-Beginn | Plan-Ende  | Kunde                   | Plan-Aufwand | Ist-Aufwand | Angebot    | Rechnung  |
|--------|---------------------------------|-------------|------------|-------------------------|--------------|-------------|------------|-----------|
| BMW06  | Implementation TransportManager | 15.12.2005  | 13.05.2006 | BMW AG                  | 272,00       | 102,00      | 38.660,00  | 6.494,31  |
| BMW03  | SAP Add-ons BMW                 | 19.04.2005  | 12.05.2005 | BMW AG                  | 116,00       | 178,75      | 19.560,00  | 25.360,00 |
| VF09   | Einführung Projectile           | 13.03.2006  | 06.06.2006 | Vattenfall Europe       | 168,00       | 242,75      | 0,00       | 0,00      |
| DS09   | Einführung Risikomanagement     | 16.01.2006  | 05.05.2006 | Vattenfall Europe       | 164,00       | 122,50      | 26.940,00  | 0,00      |
| CS07   | Einführung Projectile           | 19.06.2006  | 09.08.2006 | CONSULT Holding         | 170,00       | 228,25      | 28.320,00  | 29.505,51 |
| 106    | Einführung Projectile           | 23.10.2006  | 19.12.2006 | Airbus Deutschland GmbH | 328,00       | 90,75       | 51.720,00  | 7.235,00  |
| 92     | QM-Modul                        | 05.12.2006  | 26.01.2007 | CONSULT Holding         | 240,00       | 196,00      | 48.876,00  | 0,00      |
| 93     | RM-Modul                        | 02.01.2007  | 19.02.2007 | BMW AG                  | 240,00       | 0,00        | 0,00       | 0,00      |
| 100    | Einführung Fibu                 | 22.12.2006  | 02.02.2007 | Jöckler Software GmbH   | 168,00       | 10,50       | 0,00       | 0,00      |
|        |                                 |             |            |                         | 1.866,00     | 1.171,50    | 214.076,00 | 68.594,82 |

297 x 210 mm 1 von 1

... "RTF", ...

startFile?d=\$APPREG\_1168258616562\_Projectlist\_200701080116561.rtf (Schreibgeschützt) - Microsoft Word

Projektübersicht

| Nummer | Bezeichnung                     | Plan-Beginn | Plan-Ende  | Kunde                   | Plan-Aufwand | Ist-Aufwand | Angebot    | Rechnung  |
|--------|---------------------------------|-------------|------------|-------------------------|--------------|-------------|------------|-----------|
| BMW06  | Implementation TransportManager | 15.12.2005  | 13.05.2006 | BMW AG                  | 272,00       | 102,00      | 38.660,00  | 6.494,31  |
| BMW03  | SAP Add-ons BMW                 | 19.04.2005  | 12.05.2005 | BMW AG                  | 116,00       | 178,75      | 19.560,00  | 25.360,00 |
| VF09   | Einführung Projectile           | 13.03.2006  | 06.06.2006 | Vattenfall Europe       | 168,00       | 242,75      | 0,00       | 0,00      |
| DS09   | Einführung Risikomanagement     | 16.01.2006  | 05.05.2006 | Vattenfall Europe       | 164,00       | 122,50      | 26.940,00  | 0,00      |
| CS07   | Einführung Projectile           | 19.06.2006  | 09.08.2006 | CONSULT Holding         | 170,00       | 228,25      | 28.320,00  | 29.505,51 |
| 106    | Einführung Projectile           | 23.10.2006  | 19.12.2006 | Airbus Deutschland GmbH | 328,00       | 90,75       | 51.720,00  | 7.235,00  |
| 92     | QM-Modul                        | 05.12.2006  | 26.01.2007 | CONSULT Holding         | 240,00       | 196,00      | 48.876,00  | 0,00      |
| 93     | RM-Modul                        | 02.01.2007  | 19.02.2007 | BMW AG                  | 240,00       | 0,00        | 0,00       | 0,00      |
| 100    | Einführung Fibu                 | 22.12.2006  | 02.02.2007 | Jökler Software GmbH    | 168,00       | 10,50       | 0,00       | 0,00      |
|        |                                 |             |            |                         | 1.866,00     | 1.171,50    | 214.076,00 | 68.594,82 |

Seite 1 Ab 1 1/1 Bei 1,6 cm Ze 1 Sp 1 MAK AND ERW UB Deutsch (De)

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

Microsoft Excel - http://localhost:8080/projectile/startFile?d=\$APPREG\_1168258732843\_Projectlist\_200701080118521.xls [Schreibgeschützt]

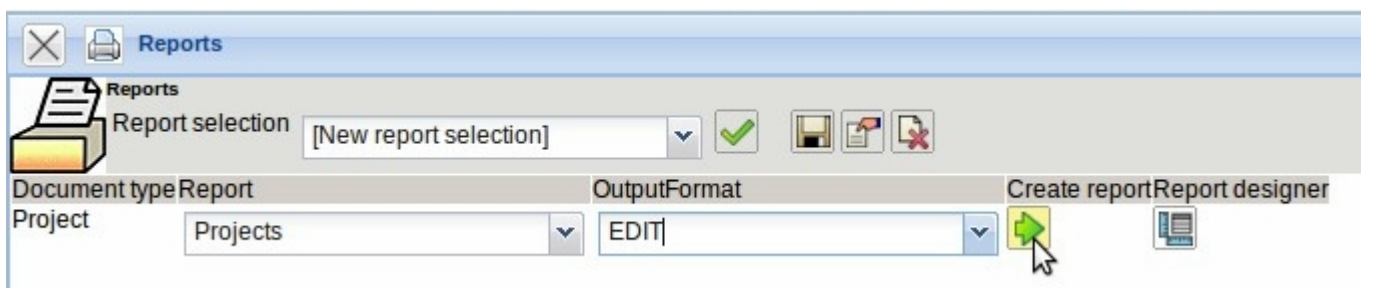
|    | A                | B                               | C                | D                | E                       | F            | G           | H         | I        |
|----|------------------|---------------------------------|------------------|------------------|-------------------------|--------------|-------------|-----------|----------|
| 1  | Projektübersicht |                                 |                  |                  |                         |              |             |           |          |
| 2  |                  |                                 |                  |                  |                         |              |             |           |          |
| 3  | Nummer           | Bezeichnung                     | Plan-Beginn      | Plan-Ende        | Kunde                   | Plan-Aufwand | Ist-Aufwand | Angebot   | Rechnung |
| 4  | BMW06            | Implementation TransportManager | 15.12.2005 00:00 | 13.05.2006 00:00 | BMW AG                  | 272,00       | 102,00      | 38660,00  | 6494,31  |
| 5  | BMW03            | SAP Add-ons BMW                 | 19.04.2005 00:00 | 12.05.2005 00:00 | BMW AG                  | 116,00       | 178,75      | 19560,00  | 25360,00 |
| 6  | VF09             | Einführung Projectile           | 13.03.2006 00:00 | 06.06.2006 00:00 | Vattenfall Europe       | 168,00       | 242,75      | 0,00      | 0,00     |
| 7  | DS09             | Einführung Risikomanagement     | 16.01.2006 00:00 | 05.05.2006 00:00 | Vattenfall Europe       | 164,00       | 122,50      | 26940,00  | 0,00     |
| 8  | CS07             | Einführung Projectile           | 19.06.2006 00:00 | 09.08.2006 00:00 | CONSULT Holding         | 170,00       | 228,25      | 28320,00  | 29505,51 |
| 9  | 106              | Einführung Projectile           | 23.10.2006 00:00 | 19.12.2006 00:00 | Airbus Deutschland GmbH | 328,00       | 90,75       | 51720,00  | 7235,00  |
| 10 | 92               | QM-Modul                        | 05.12.2006 00:00 | 26.01.2007 00:00 | CONSULT Holding         | 240,00       | 196,00      | 48876,00  | 0,00     |
| 11 | 93               | RM-Modul                        | 02.01.2007 00:00 | 19.02.2007 00:00 | BMW AG                  | 240,00       | 0,00        | 0,00      | 0,00     |
| 12 | 100              | Einführung Fibu                 | 22.12.2006 00:00 | 02.02.2007 00:00 | Jökler Software GmbH    | 168,00       | 10,50       | 0,00      | 0,00     |
| 13 |                  |                                 |                  |                  |                         | 1866,00      | 1171,50     | 214076,00 | 68594,82 |
| 14 |                  |                                 |                  |                  |                         |              |             |           |          |
| 15 |                  |                                 |                  |                  |                         |              |             |           |          |
| 16 |                  |                                 |                  |                  |                         |              |             |           |          |
| 17 |                  |                                 |                  |                  |                         |              |             |           |          |

Worksheet

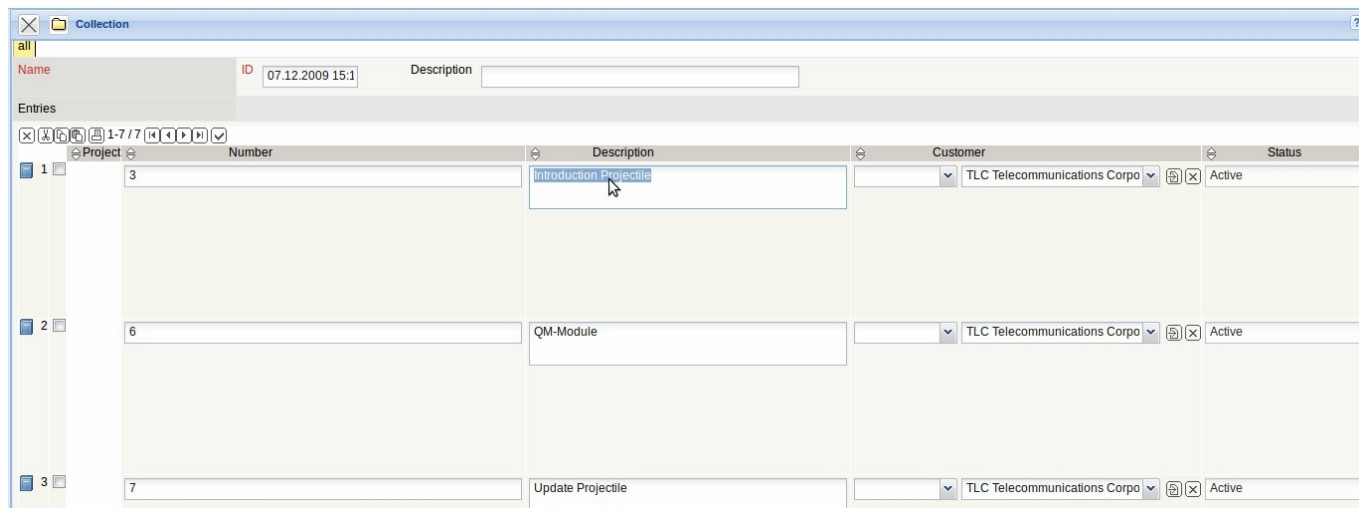
... XML.



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



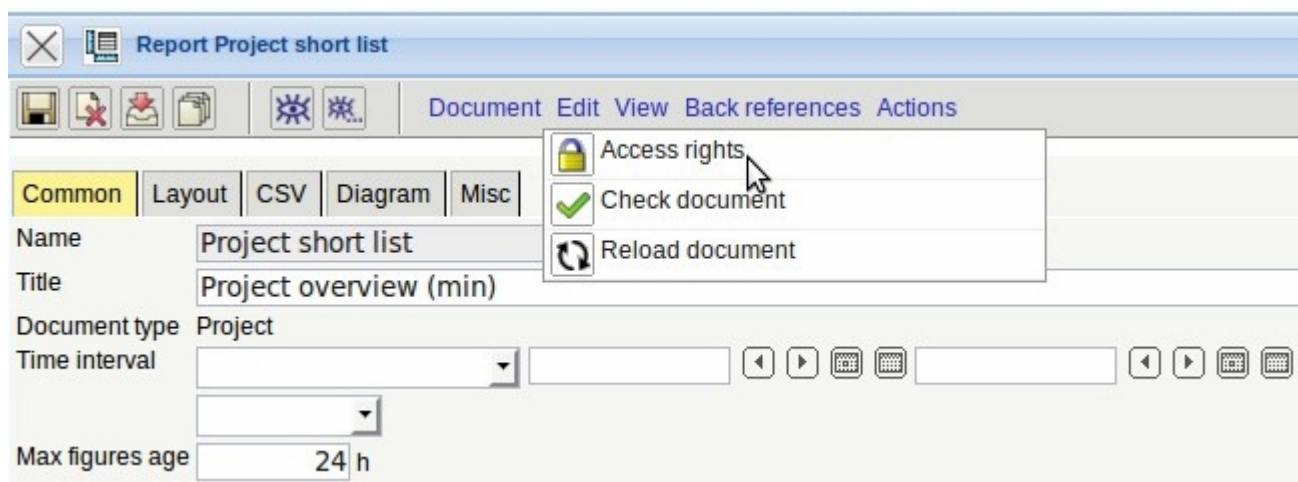
... be conveniently edited.



| Name | ID | 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

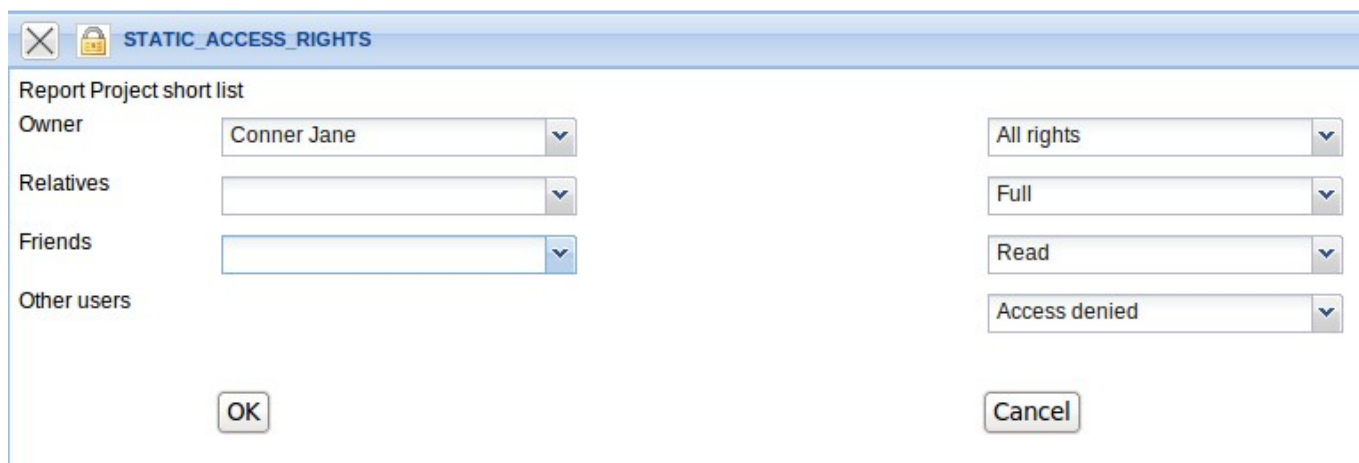
Max figures age 24 h

Access rights

Check document

Reload document

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



STATIC\_ACCESS\_RIGHTS

Report Project short list

Owner Conner Jane

Relatives

Friends

Other users

All rights

Full

Read

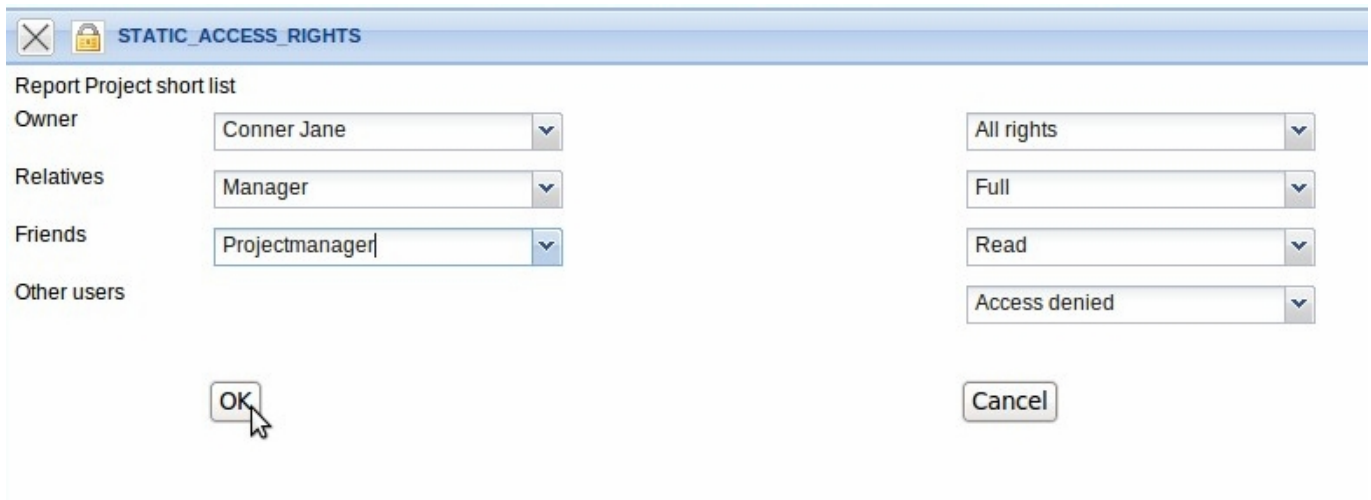
Access denied

OK

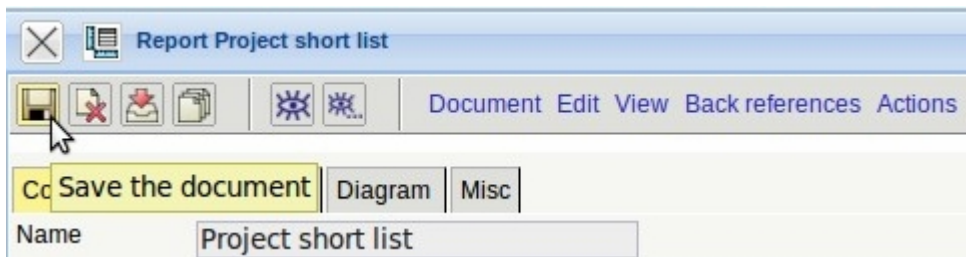
Cancel

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

do not have access to this report.



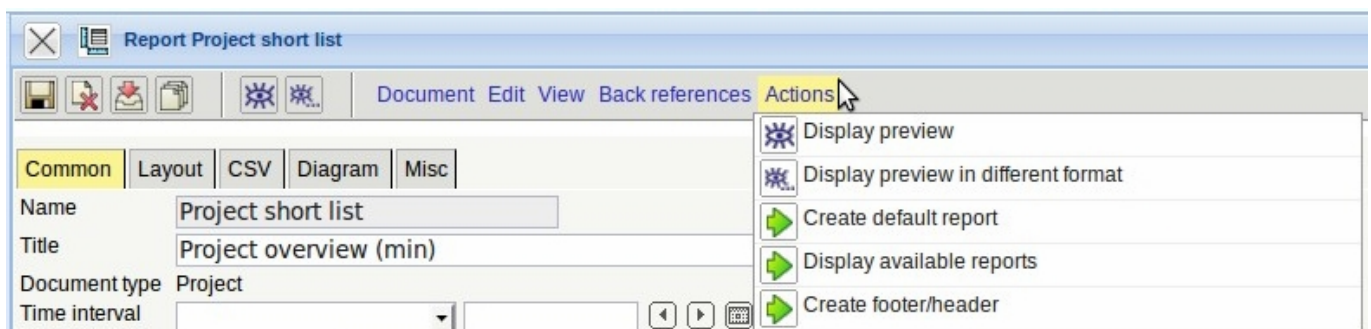
Note: The change of the authorization is only active after saving the document.



## 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



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Permanent link:

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Last update: **2019/10/25 14:09**