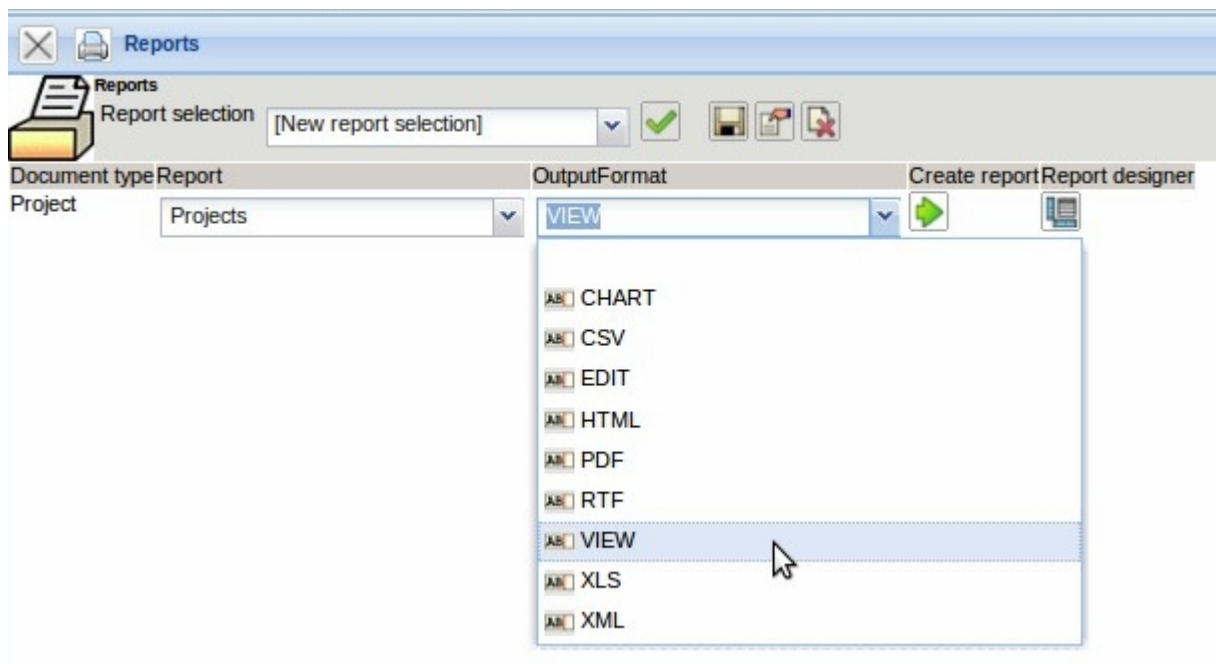


[previous](#) [Home](#) [next](#)

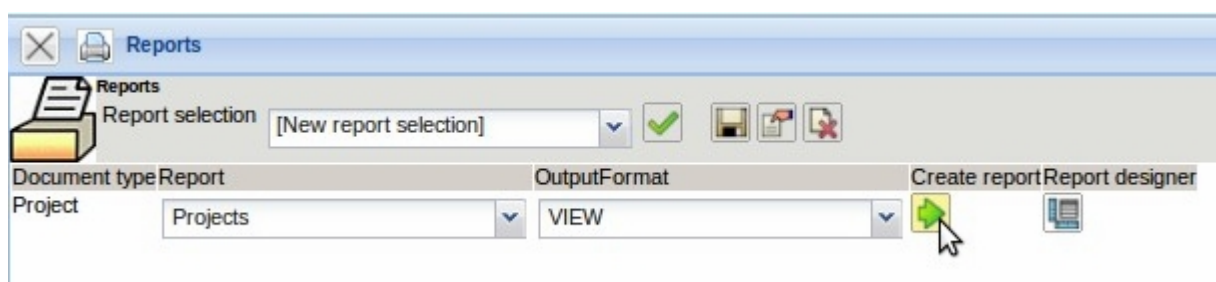
3.06 Reportgenerator "ReportMaker" (continued 1)

Generate Reports:

The ReportMaker offers a variety of formats as output options.



The option "VIEW" ...



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

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 $f(x)$ Σ =

	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", ...

Projects_201001040105381.pdf - Adobe Reader

Datei Bearbeiten Anzeige Dokument Werkzeuge Fenster Hilfe

Suchen

Project list

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

297 x 210 mm

... "RTF", ...

... "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									

... XML.

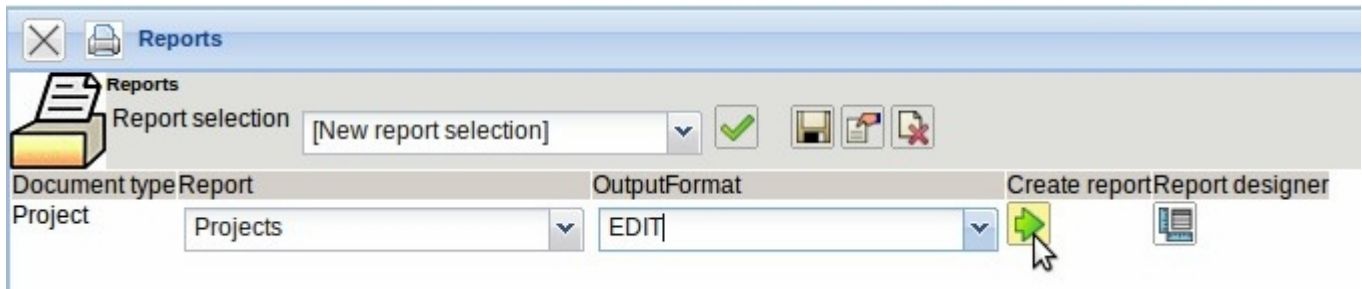
http://localhost:8080/projectile/startFile?d=\$APPREG_1168258843062_Projectlist_200701080120431. - Windows Internet Explorer

```

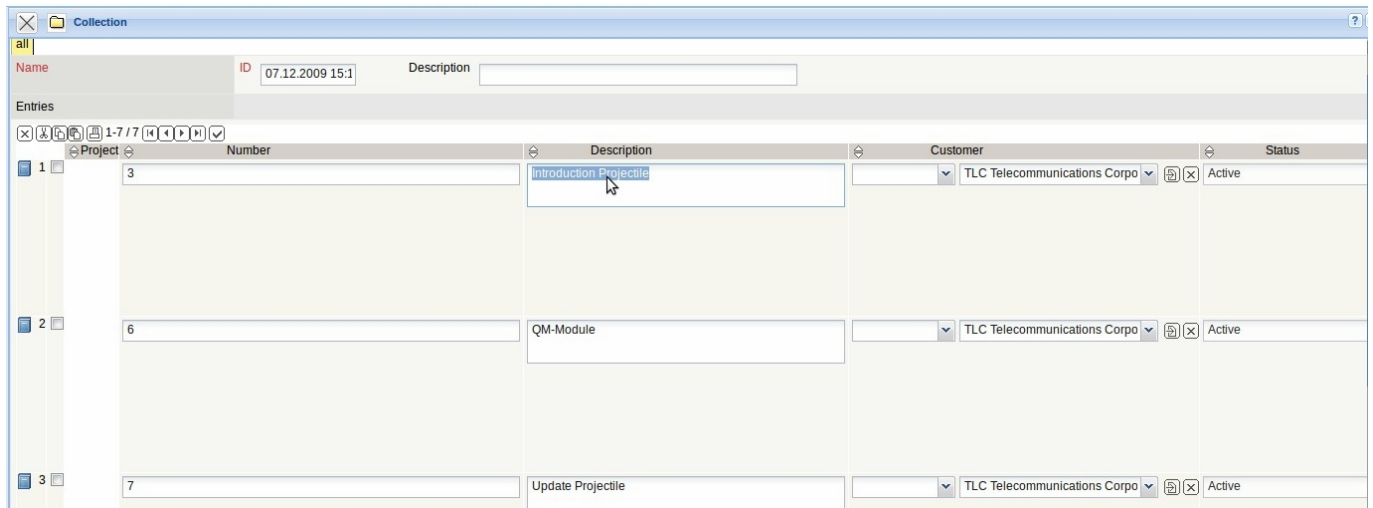
<?xml version="1.0" encoding="UTF-8" ?>
<report>
  <row type="header">
    <column columnId="0">Nummer</column>
    <column columnId="1">Bezeichnung</column>
    <column columnId="2">Plan-Beginn</column>
    <column columnId="3">Plan-Ende</column>
    <column columnId="4">Kunde</column>
    <column columnId="5">Plan-Aufwand</column>
    <column columnId="6">Ist-Aufwand</column>
    <column columnId="7">Angebot</column>
    <column columnId="8">Rechnung</column>
  </row>
  <row type="data">
    <cell type="STRING" fieldName="Nummer" columnId="0">BMW06</cell>
    <cell type="STRING" fieldName="Bezeichnung" columnId="1">Implementation TransportManager</cell>
    <cell type="DATE" fieldName="Plan-Beginn" columnId="2">Thu Dec 15 00:00:00 CET 2005</cell>
    <cell type="DATE" fieldName="Plan-Ende" columnId="3">Sat May 13 00:00:00 CEST 2006</cell>
    <cell type="COLLECTION" fieldName="Kunde" columnId="4">
      <entry link="http://localhost:8080/projectile/start/projectile/start?show=%255E.%257CDefault%257CCustomer%257C1%257C6" type="DOCUMENT_LINK">BMW AG</entry>
    </cell>
    <cell type="FLOAT" fieldName="Plan-Aufwand" columnId="5">272.0</cell>
    <cell type="FLOAT" fieldName="Ist-Aufwand" columnId="6">102.0</cell>
    <cell type="FLOAT" fieldName="Angebot" columnId="7">38660.0</cell>
    <cell type="FLOAT" fieldName="Rechnung" columnId="8">6494.31</cell>
  </row>
  <row type="data">
    <cell type="STRING" fieldName="Nummer" columnId="0">BMW03</cell>
    <cell type="STRING" fieldName="Bezeichnung" columnId="1">SAP Add-ons BMW</cell>
    <cell type="DATE" fieldName="Plan-Beginn" columnId="2">Tue Apr 19 00:00:00 CEST 2005</cell>
    <cell type="DATE" fieldName="Plan-Ende" columnId="3">Thu May 12 00:00:00 CEST 2005</cell>
    <cell type="COLLECTION" fieldName="Kunde" columnId="4">
      <entry link="http://localhost:8080/projectile/start/projectile/start?show=%255E.%257CDefault%257CCustomer%257C1%257C6" type="DOCUMENT_LINK">BMW AG</entry>
    </cell>
  </row>
</report>

```

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

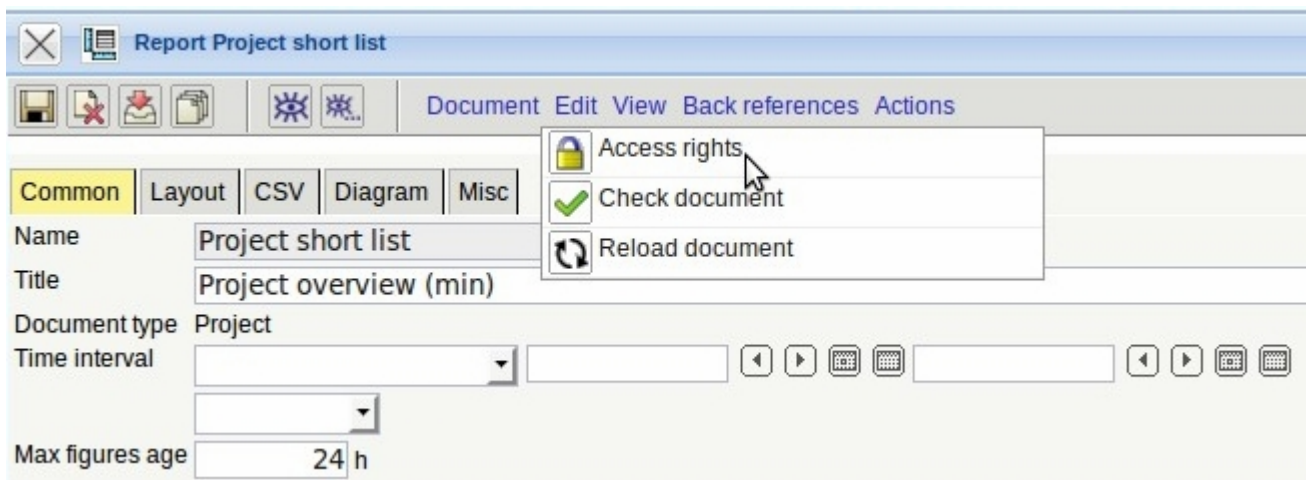


... be conveniently edited.



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 ...



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

STATIC_ACCESS_RIGHTS

Report Project short list

Owner: Conner Jane (dropdown) All rights (dropdown)

Relatives: (empty dropdown) Full (dropdown)

Friends: (empty dropdown) Read (dropdown)

Other users: (empty dropdown) Access denied (dropdown)

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.

STATIC_ACCESS_RIGHTS

Report Project short list

Owner: Conner Jane (dropdown) All rights (dropdown)

Relatives: Manager (dropdown) Full (dropdown)

Friends: Projectmanager (dropdown) Read (dropdown)

Other users: (empty dropdown) Access denied (dropdown)

OK Cancel

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

Report Project short list

Document Edit View Back references Actions

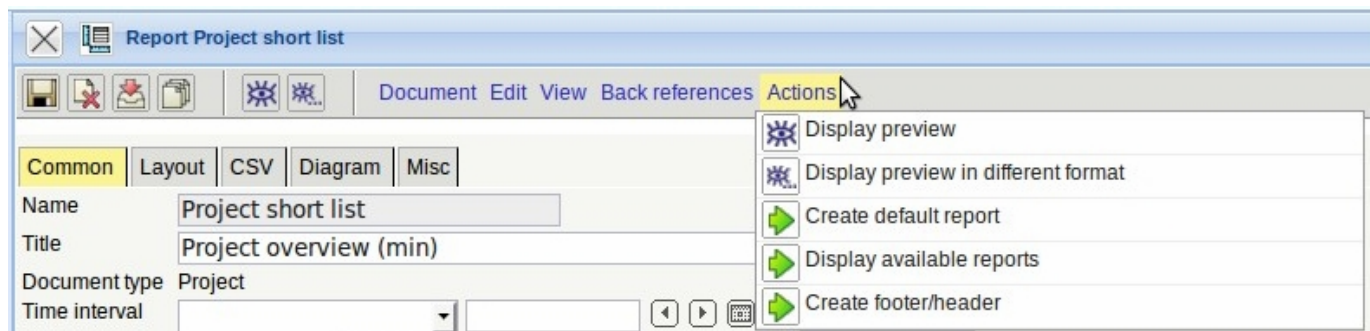
Cc Save the document Diagram Misc

Name: Project short list

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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