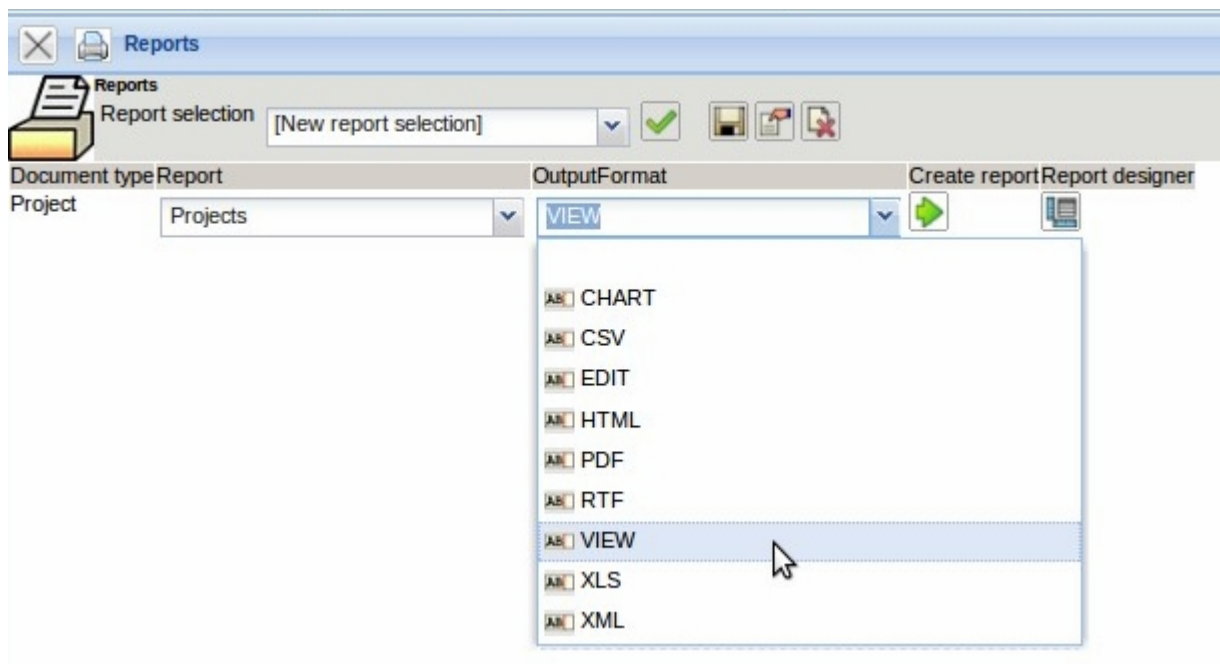


[previous](#) [Home](#) [next](#)

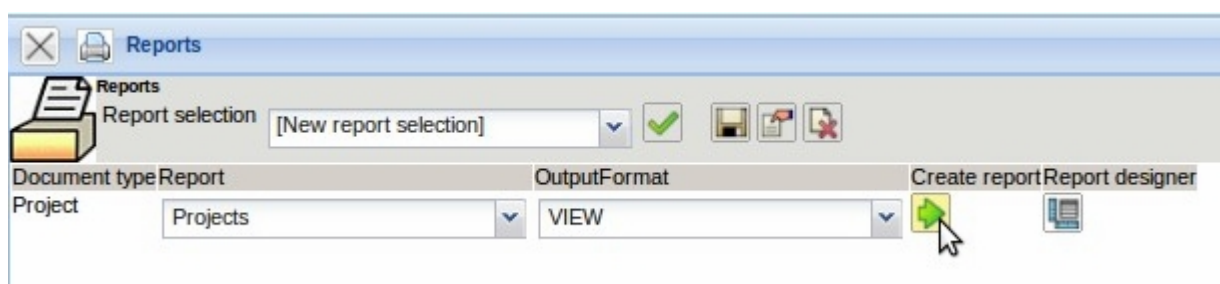
3.06 Reportgenerator "ReportMaker" (continued 1)

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

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

1 / 1 100% 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", ...

Projects_201001041250471.rtf (schreibgeschützt) - OpenOffice.org Writer

Datei Bearbeiten Ansicht Einfügen Format Tabelle Extras Fenster Hilfe

100%

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

Seite 1 / 1 Standard STD 100%

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

Projects_200912180506091.xls (schreibgeschützt) - OpenOffice.org Calc

Datei Bearbeiten Ansicht Einfügen Format Extras Daten Fenster Hilfe

A29:AMJ29 f(x) Σ =

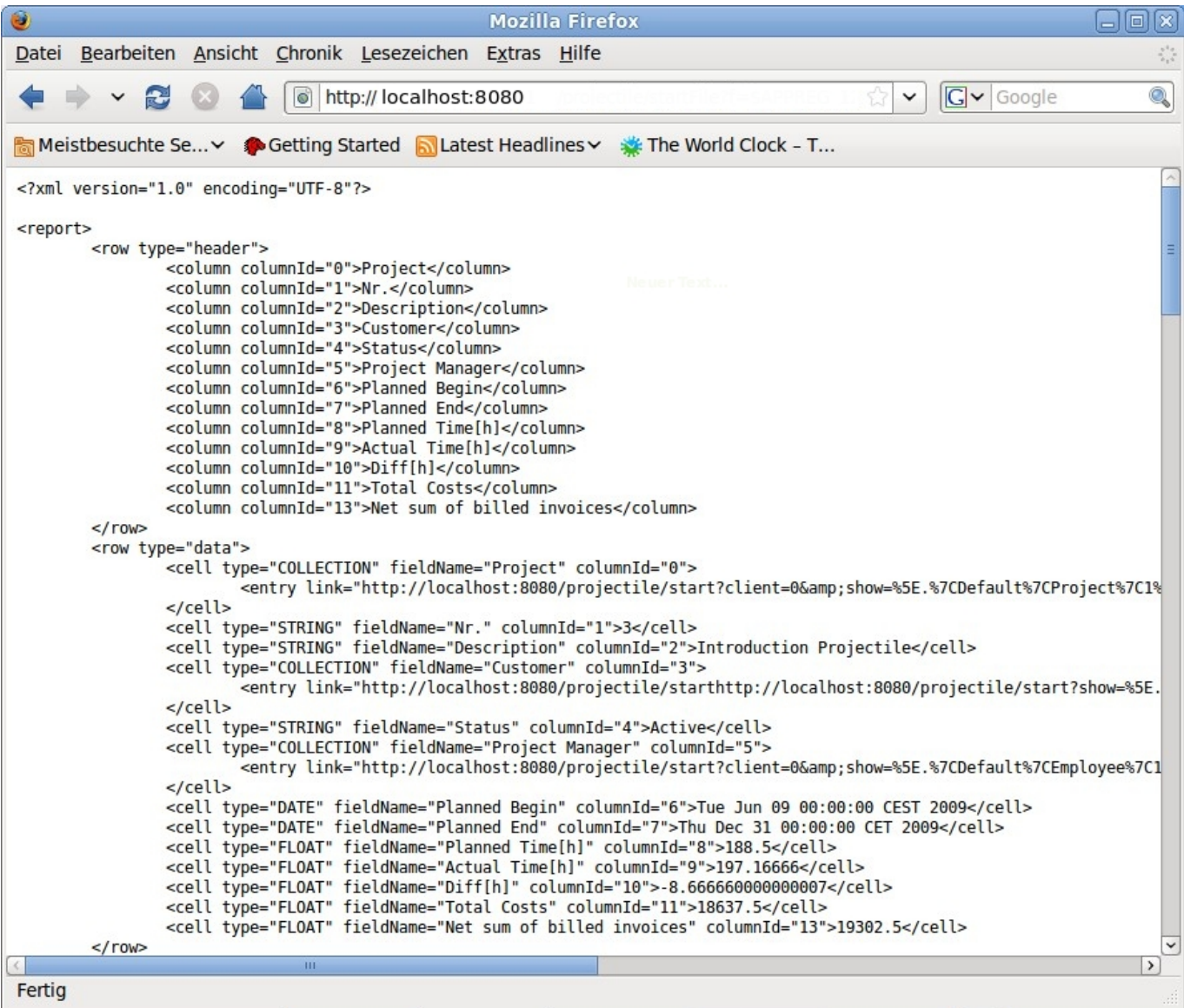
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Project list													
2														
3	Project	Nr.	Description	Customer	Status	Project Manager	Planned Begin	Planned End	Planned Time[h]	Actual Time[h]	Diff[h]	Total Costs	Net sum of	billed invoices
4	3	3	Introduction Projectile	TLC Telecomm	Active	1: Conner Jane	09.06.2009 00:00	31.12.2009 00:00	188,5	197,17	-8,67	18637,5	19302,5	
5				TLC Telecomm					188,5	197,17	-8,67	18637,5	19302,5	
6	4	4	Customizing CRM Sys		Active	1: Hahn Katrina	20.09.2009 00:00	31.10.2009 00:00	80	0	80	2800	0	
7				Sum					80	0	80	2800	0	
8	5	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	
9	6	7	Update Projectile	TLC Telecomm	Active	1: Conner Jane	16.10.2009 00:00	30.11.2009 00:00	108	0	108	17940	0	
10				TLC Telecomm					146	143	3	19825,44	0	
11	9	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	
12	11	12	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	
13				John Green Ltd.					80	24,92	55,08	5000	0	
14				Sum					494,5	365,08	129,42	46262,94	19302,5	
15														
16														
17														
18														
19														
20														

Worksheet

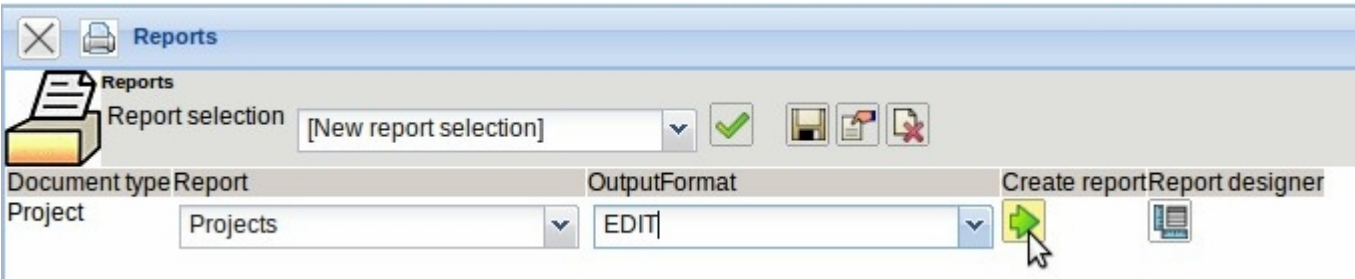
Tabelle 1 / 1 PageStyle_Worksheet 100% STD Summe=0

... XML.

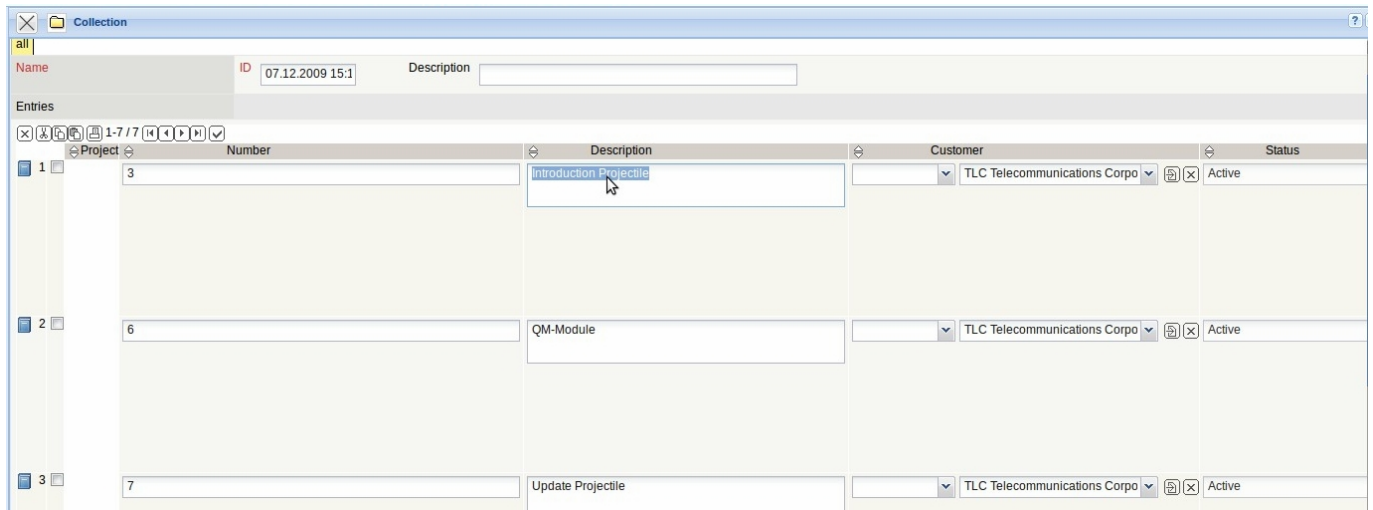
Last
update:
2019/10/25 14:09 en:handbuch:kapitel_3:fortsetzung https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_3:fortsetzung&rev=1261153309



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



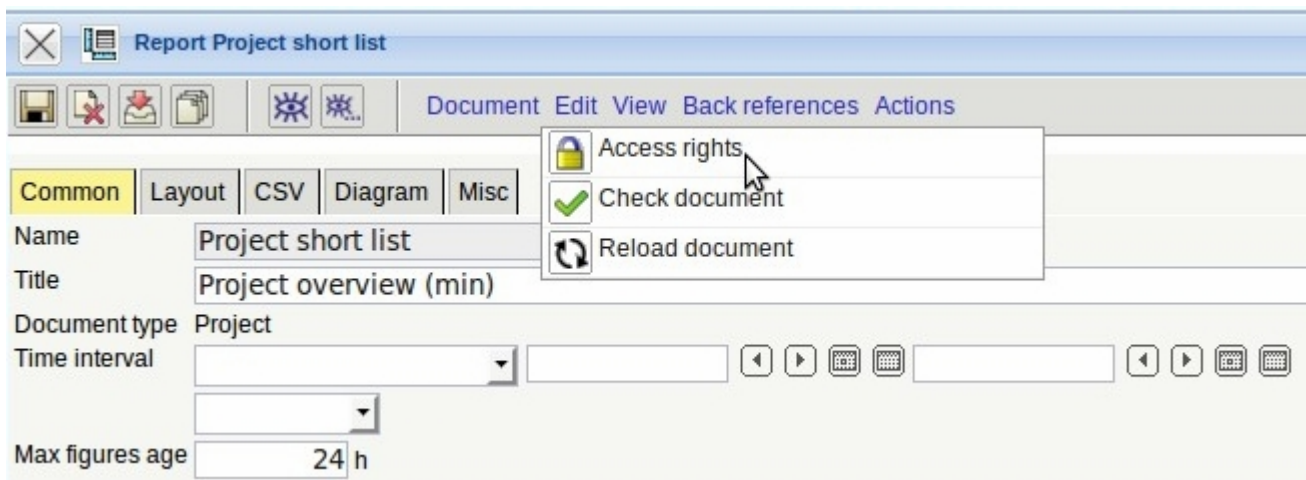
... be conveniently edited.



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

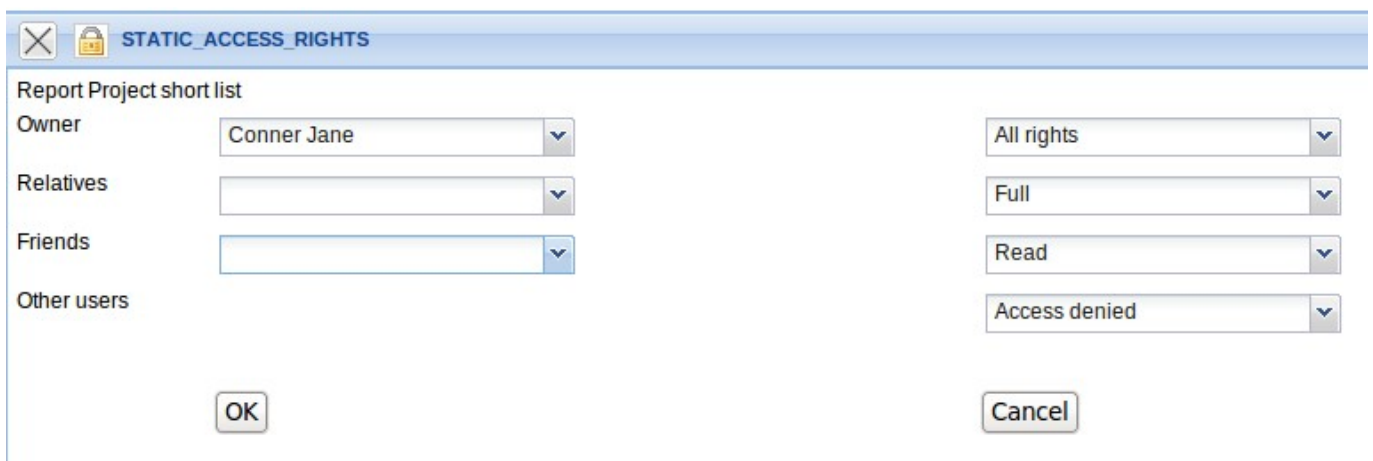
Max figures age 24 h

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

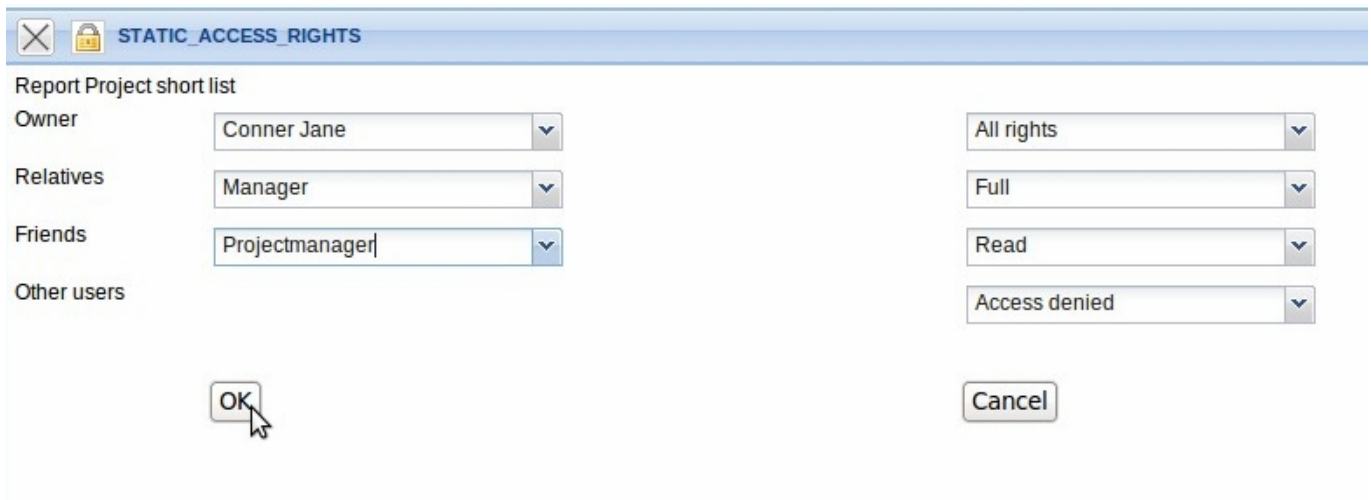
Access denied

OK

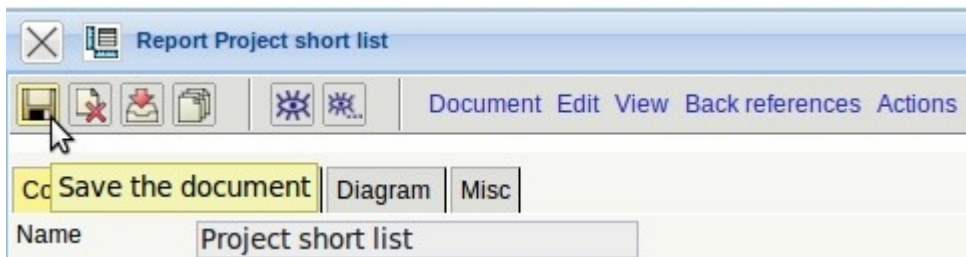
Cancel

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

do not have access to this report.



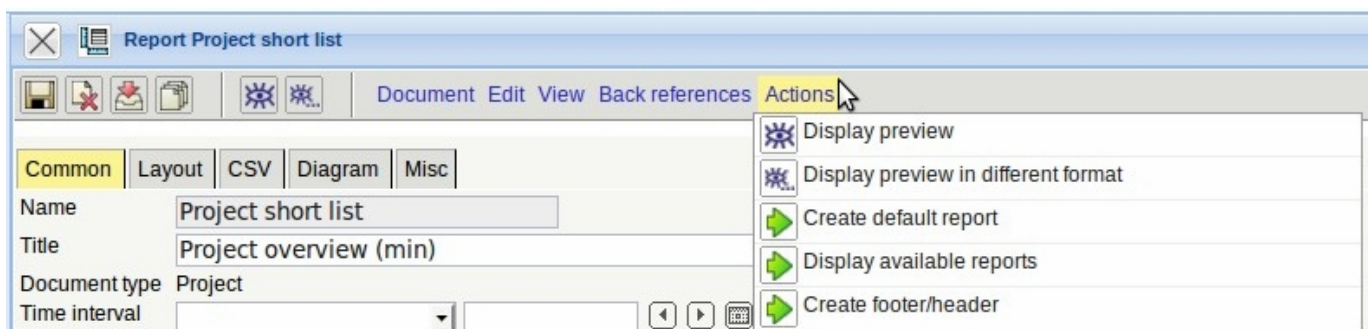
Note: The change of the authorization is only active after saving the document.



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 page 2

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