

Projectile Version 6

The integrated total solution for service providers: projects, processes, knowledge.

Help, Part 10: Report Generator

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10.1 Report Generator

A report generator is an application for creating reports (also called reports) from the data of a database or other data sources. In order that reports can be created not only by software developers but also by end users, the necessary database queries are defined via a graphical user interface and the database-specific statements (here SQL) are generated automatically. In Projectile, the report generator consists of the **Query Manager**, the **Report Designer** and the **Dashboard Builder**. The report generator in Projectile offers, in addition to the standard reports, a further possibility to evaluate the data stock of Projectile and to adapt existing reports.

The queries in Projectile can be used, for example, in the portals or the standard evaluations.

10.2 Query Manager

The **Query Manager** has a database language for searching for information. The result of a query is a subset of the underlying information. This is why it is also referred to as filtering the data.

The query language (internally called IDQL) is similar to the query language SQL, but has important differences:

- The access rights of Projectile are respected you cannot load data that you cannot see in Projectile
- The links between different tables (e.g. project and employee) work differently than JOINS in SQL
- Queries can be combined into compound queries

Note: Queries can put so much strain on the database that the function of Projectile is no longer guaranteed. Therefore queries are comparable to development tasks and should be checked on a test system before you use them productively.

10.2.1 Structure and Syntax of the Query

Queries always return a list of documents of one type.

For example

Employee:

a list of employees.

Without any further restrictions, the query returns all documents of one type, in this case all employees. Of course, only those documents are listed to which the user has access rights.

With conditions you can restrict the list of delivered documents. A condition has the following structure:

"FIELD NAME" OPERATOR "VALUE",

e.g. for projects with planned expenditure > 100

Project: Planned Expenditure > 100

Several conditions can be connected by **AND**, **OR**, and **NOT** and by using **brackets**:

Project: Planned Expenditure > 100 AND Name LIKE "Consulting

- both conditions must apply

Project: Planned Expenditure < 100 OR actual expenditure > 100

- at least one condition must apply:

Employee : NOT Name LIKE "Müller"

- the condition must not apply

Contact : Category = "Customer" AND (Country = "D" OR Country = "CH")

- The brackets () are used to combine several conditions into one

The Query Manager provides a list of all available field names of a document type if you select the "Document Type" and then open the "Document Fields" field.

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Name Description Query Project: Image: Comment types Document fields Project Project Project Particle (planning time Parenet/WorkingDaysProject Plannet/WorkingDaysProject Show/Parameters Parenet/Parameters Show yary name Pre-cal Revenue Show/Description Preliminary settlement Preliminary settlement Preliminary settlement Show/Description Preliminary settlement Preliminary settlement Preliminary settlement Show/Description Preliminary settlement Preliminary settlement Preliminary settlement Show/Description Preliminary settlement Prionity Preliminary settlement Preliminary settlement Preliminary settlement Prionity Preliminary settlement	📄 😰 🏝 🙆 🗾 SP 🔍 StartQuery	New query Selection	
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Show query name Pre-cal Costs Pre-cal Revenue Pre-cal Revenue ShowDescription Preliminary settlement ShowDescriptionInParameterDialog Priority	show Figure parameters		
ShowDescription Preliminary settlement Priority Priority			
ShowDescriptionInParameterDialog			

The following expressions are currently supported as comparison operators:

No.	Operator	Description
1	=	Checking the field content for equality.
2	!=	Checking the field content for inequality.
3	<	Check if field content is smaller than the value.
4	<=	Check if field content is smaller or equal to the value.
5	>	Check if field content is greater than the value.
6	>=	Check if field content is greater or equal to the value.
7	LIKE	Check if the field content contains the value.
8	CONTAINS	Check if the field content of a multiple selection contains the value.
9	STARTS_WITH	Check if the field content starts with the value.
10	ENDS_WITH	Check if the field content ends with the value.

Examples:

The expression 1 **Status = "Active"** finds all documents where the field content Status is exactly "Active" and the expression 2 **Status != "Active"** finds all documents where this content is not equal to "Active".

The expression 3 **Plan effort < 100** finds all documents that are smaller than 100 and the expression 4 **Plan effort <= 100** finds all documents that are smaller or exactly equal to 100.

The expression 7 **employees LIKE "Meier"** compares whether the value is contained in the field content (for example "Klaus Meier", "Monika Meier-Grund", ...).

The expression 8 **Project Team CONTAINS "Meier"** compares whether the value "Meier" is contained in a multiple selection field (like the project team, where there can be several entries).

The expression 9 Name STARTS_WITH "Meier" finds all documents where the field contents begin with the value ("Meier", "Meierle", and query 10 Name ENDS_WITH "Meier" finds all documents where the field contents end with the value ("Meier", "Altmeier", ...).

You can also use references. References are used to formulate conditions not only for the searched document, but also for documents that are linked to the searched document.

For example, you can search for work packages that are in active projects:

First, the "Project" field in the work package is used to establish a relationship to the project document: **Project** \rightarrow **Project**

After that you can formulate conditions for all fields of the project by putting the text "Project" in front of the field name: **Project.status = "active**

Work Package : Project -> Project AND project status = "active

You can use the **SORT** addition to sort the results.

Example: **SORT name**, sorted by the field "Name". Ascending (ASC) is the default setting for sorting and does not need to be specified explicitly. DESC sorts in descending order. Example: **SORT name DESC**, sorted in descending order by the field "Name".

If you want to use several fields for sorting, you must separate the fields with commas (note spaces):

Employee : SORT Name , First Name

In the Query Manager you can also use fixed variables, if for example the logged in user or the current date is needed as value.

No.	Variable	Description
1	\$today	Current day
2	\$user	Link to current (registered) employees
3	\$userlastname	Last name of the current employee
4	\$userlogin	Login of the current employee
5	\$userlanguage	Language of the current employee
6	\$usercountry	Country of the current employee

The available variables can be viewed in the Query Manager:

	ep	StartQuery	New query	Coloction	
	φr	StartQuery	Incon ducin	Selection	

In addition, **parameters** can be used if the user should enter the value himself. An example of how to use parameters is given in the next section.

10.2.2 Structure of the Query Manager

The Query Manager is located in the left main menu. In the field "Selection" you find the queries and can select a saved query.

After selecting an existing query, the query appears in the "Query" area and can be changed or executed. In the frame "Report" the selected queries can then be assigned to existing report definitions or new report definitions can be created.

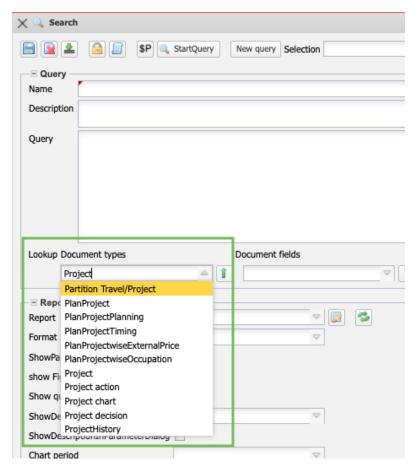
If an existing query, such as "IDS - Active Customer Projects (MPM)", is to be called up, all you have to do is select the corresponding entry from the list and the query appears in the corresponding field:

🔍 Search			-口 -
Description	Selection IDS - Projekt - Kundenprojekt (aktiv, MPM) IDS - Projekt - Kundenprojekt (aktiv, MPM) IDS - Sosten - Meine Reisen IDS - Prosonal - Meine Units (Manager) IDS - Prosonal - Mitarbetter (aktiv, Festangestellt)		
Lookup Document types		S - Projekt - Meine Arbeitspakete (passiv und aktiv) C Tielente mit Venueleen wit Venden Field values	×
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Report Projekte - 1		3 🕲	

10.2.3 Create Queries

Besides using saved queries, it is also possible to create new queries yourself. In the following example we create a query about all active customer projects. Queries can be typed in directly or compiled with the help of the "Look Up" wizard.

First select the entry "Project" from the left selection box "Document types":



The selection then generates the query **Project:** The query returns all projects from the database.

🗙 🔍 Search	
🖹 🖹 🔝 🗐 🗐 🔍	StartQuery New query Selection
Query	
Name	
Description	
Query Project:	Document fields
= Report	
Report Report	▽ 😺 😒
Report	
Report Format	
Report Format ShowParameters	
Report Format ShowParameters show Figure parameters	
Report Format ShowParameters show Figure parameters Show query name	

With the help of the selection box "Document fields" the fields for the conditions can be selected and in the selection box "Field values" ...

X 🔍 Search
E Selection View query Selection
Query Name Description
Query Project: Status
Lookup Document types Document fields Field values
Report Seport

... then the values of the selected field (here "Status") are available (here "passive", "advance", "active", ...)

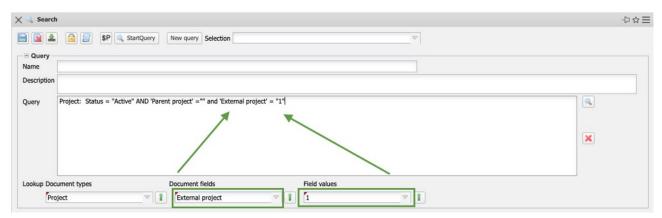
🔍 🔍 Search				
🖹 🖹 🛓 💼 📄 SP 🔍	StartQuery New query Selection			\bigtriangledown
= Query				
Name				
Description				
Query Project: Status = "Act				
Lookup Document types	Document fields	1	Field values	
Project		▽ 1	Active	▼ 1

The query **Project: Status = "active"** then returns all projects from the database with the status "active".

You can link further conditions with **AND** or **OR**. In the example, the next condition should <u>also</u> apply.

Query Project: Status = "Active" AND

So an AND is typed in and then the next condition is composed. The query **Project: Status = "active" AND Master project = "" AND 'ext. Order' = "1"** then returns all projects from the database with the status "active" and parent project = "" (empty) and external order = "1", ...



... all active customer projects that do not have any major projects. These projects are then a parent project. The query is saved ...

X 🔍 Searc	ch .	₽☆≡
	StartQuery New query Selection IDS - Project List	
Query -		
Name	IDS - Project List	
Description	n	
Query	Project : Status = "Active" AND 'Parent project' = "" AND 'External project' = "1"	
		×

... and executed. Projectile delivers as result a hit list with the active customer projects (here 14 hits).

× o	6.0	8.2021 11:35:0	2 (14 Results)			X 🛶 Search	中合日
0	1	۵ 🖬 🛓 ն	1 🞯	Filter.		Rev Rev StartQuery New query Selection IDS - Project List	
		Number	Status	Description	Content		
E	1	001	Active	Entwicklung Mo		Query	
	2	014	Active	Einführung Proj		Name TDS - Project List	
	3	002	Active	Entwicklung Mo		Description	
	4	019	Active	Entwicklung Mo		Query Project : Status = "Active" AND 'Parent project' = "" AND 'External project' = "1"	
	5	022	Active	Einführung Fibu	Inhaltsb	Query Project - Status = Active Anto Parent project = Anto External project = 1	<u>_</u>
	6	025	Active	Einführung EPM			
	7	031	Active	Katalogprojekt			×
	8	047	Active	Einführung EPM			
	9	045	Active	Einführung EPM			
1	0	050	Active	Demo 12			
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						Report 🔍 😨 🚱	
						Format	
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						show Figure parameters	
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						Chart period 🗢	
						Start End e	

If two values are searched for a field, an OR is used. The example is extended to all customer projects that have the status "active" or "advance performance": **Project: (status = "active" OR status = "advance") AND master project = "" AND 'ext. Order' = "1".** Projectile then delivers as a result a hit list with the active customer projects and pre-production projects (here 14 hits).

× °	6.0	8.2021 11:38:12	(18 Results)			X 🔍 Search	₽☆≡
	1	8 🖬 🕹 😭	1	Filter.		E R SP StartQuery New query Selection IDS - Project List	
8		Number	Status	Description	Content		
	1	001	Active	Entwicklung Mo		- Duery	
	2	005	Advance	Einführung EPM		Name IDS - Project List	
	3	011	Advance	Entwicklung Mo		Description	
	4	009	Advance	Beratung "Einka		Query Project : (Status = "Active" OR Status = "Advance") AND 'Parent project' = "" AND 'External project' = "1"	
	5	014	Active	Einführung Proj		Query Project : (Status = "Active" OR Status = "Advance") AND 'Parent project = "" AND 'External project = "1"	
8	6	002	Active	Entwicklung Mo			
8	7	019	Active	Entwicklung Mo			-
0	8	022	Active	Einführung Fibu	Inhaltsb		×
	9	025	Active	Einführung EPM	-		
21	0	003	Advance	Entwicklung Mo			
	1	031	Active	Katalogprojekt		Lookup Document types Document fields Field values	
	2	047	Active	Einführung EPM			
0	13	045	Active	Einführung EPM		Project V Status V Advance V	
	4	050	Active	Demo 12		- E Report	
	15	058	Active	Einführung EPM		Report 🔍 😨 😨	
0	16	061	Active	Einführung EPM		Format	
	7	067	Active	Tickets		ShowParameters	
0	8	072	Active	Testprojekt	fhgkhfkç		
-						show Figure parameters	
						Show query name	
						ShowDescription	
						ShowDescriptionInParameterDialog	
						Chart period 🗢	
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You can also use variables and parameters in the queries. The example is extended by the condition that the project manager is the logged in user:

	06.08.2021 11:42:02 (9 Results)								X 🔍 Search	h						-12 42
6	/	A 🖬 🕹 🛐	1 🕱				Filter.			🔒 🔲 SF	StartQuery	New query Sele	ection IDS -	Project List		
3		Number	Status	Description	Begin planning	End planning	Project managers	Custom				()	100	i rojeci zor		
3	1	019	Active	Entwicklung Mo	09.12.2019	19.12.2019	Schaub Peter	CSB Cot	Query -							
3	2	003	Advance	Entwicklung Mo	09.12.2019	28.02.2020	Schaub Peter	CSH Co	Name	IDS - Project List						
	3	031	Active	Katalogprojekt	29.01.2020	30.04.2020	Schaub Peter	MBG Ma	Description							
1	4	045	Active	Einführung EPM	12.03.2020	21.04.2020	Schaub Peter	CSH Co		Design to 1 Chatra	= "Active" OR Stat					- I
	5	050	Active	Demo 12	05.05.2020	30.07.2020	Schaub Peter	ATB Aut	Query		managers' = \$user		AND Parent	project = Ar	ND External project	-
	6	058	Active	Einführung EPM	15.06.2020	21.07.2020	Schaub Peter	ATB Aut				-				
1	7	061	Active	Einführung EPM	22.06.2020	30.10.2020	Schaub Peter	CSB Cor								
1	8	067	Active	Tickets	04.08.2020	31.08.2020	Schaub Peter	ATB Aut								
3	9	072	Active	Testprojekt	28.08.2020	13.11.2020	Schaub Peter	CSS Cor								
										cument types oject	⊽][1	Document fields			Field values Advance	
									Pro				gers			
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									Pro Report Report Format	oject			gers			
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									Report Report Format ShowParam Show Figur Show Query ShowDescri	neters e parameters y name liption iptionInParameterE			igers			

The variable "\$user" is the placeholder for the logged in user. You can also use parameters. Parameters are capitalized after the "\$". When using a parameter, as in **customer = \$customer**, ...

K 🔍 Sear	ah da	-口 合
	a a StartQuery New query Selection IDS - Project List	
- E Query		
Name	IDS - Project List	
Description	1	
Query		
		×

... the result of the query is not displayed directly. Instead, the intermediate dialog "Query parameters" appears and the user selects the parameter (here "Customer") and confirms the intermediate dialog.

Qu	ery for Project	(2 Results)						X \$P Query parameters		
7	A 🔒 🍰	😰 I 🧭				Filter.		Please fill in missing parameters		
1	Number	Status	Description	Begin planning	End planning	Customer	Project	Wildcard facilities: *, *abc, abc* and *abc* (all, all ending with abc, all starting with abc, all containing abc)		
1	003	Advance	Entwicklung Mo	09.12.2019	28.02.2020	CSH Consult AG	Schaub		1	
2	045	Active	Einführung EPM	12.03.2020	21.04.2020	CSH Consult AG	Schaub	company CSH Consult AG		
								LimitQueryResult		

Projectile then filters out from the projects only those for the customer "CS Consult AG".

In the intermediate dialog the user can also ...

XQ	uery for Project	(9 Results)			X \$P Query parameters	☆☆目
	🗹 🖨 🏜 🏝 🙀 🧭 🛛 Filter			Please fill in missing parameters		
8	Number	Status	Description	Begin p		
	1 019	Active	Entwicklung Mo	0		
	2 003	Advance	Entwicklung Mo	0		
	3 031	Active	Katalogprojekt	2	LimitQueryResult	
3	4 045	Active	Einführung EPM	1		
3	5 050	Active	Demo 12	0		
	6 058	Active	Einführung EPM	1		
1	7 061	Active	Einführung EPM	2		
	8 067	Active	Tickets	0		
1	9 072	Active	Testprojekt	2		

... use a wildcard (*) to filter for all customers.

Another example:

The following examples show a query about all active employees with the status "permanently employed" sorted by (last) name and first name ...

StartQuery New query Selection IDS - Personal - Mitarbeiter (aktiv, Festangestellt)	日本(1)
IDS - Employees (active, permanently employed)	
Employee : 'Active user' = "1" AND 'Employee status' = "Fixed" SORT Name , 'First name'	
	IDS - Employees (active, permanently employed)

... and a query about all (main) contacts starting with "Customer" in the category (sorted by company name).

>	< 🔍 Search	1	-1⊃ ☆ 📃
	🖹 😰 👱	StartQuery New query Selection	
	- Query		
	Name	Customer Controlling	
	Description		
	Query	Company : 'Parent company' = "" AND Category STARTS_WITH "Customer" SORT 'Company name'	

10.2.4 Set Permissions

When the query is finished, it must be assigned permissions. The permission is set using the "lock" symbol.

X 3 Search	-\2 ☆ =
E E StartQuery New query Selection IDS - Project List	
Cuery	
Name IDS - Project List	
Description	
Query Project : Status = "Active" AND 'Parent project' = "" AND 'External project' = "1"	
	×
Lookup Document types Document fields Field values	
Project V I V I	

The creator of the query is preset as "owner", you have to set the other permissions then. In the example the administrators, like the owner, get the highest permission and a composite group "Poweruser" gets the permission level "2 - Read". All other users do not get permission to query:

IDQLQue	ry IDS - Project List			
Owner	Schaub Peter	V	All rights	P
Relatives	01 - Administration	V	All rights	₽
Friends	Poweruser "Projektmanagement"	V	Read	Þ
Other use	ers		Access denied	~

Further information on the authorization system can be found in the administration guide.

10.2.5 Combination of Queries

Combining queries can be useful in the following cases:

- Two different queries return partial results, which cannot be created with a single query. By simply joining the two queries together, a complete result list is generated from the parts.
- A query is so complex that the database is overloaded, so that the function of Projectile is limited. In this case the query can be split into two simpler parts.

Merging Two Lists

To merge two lists, two queries are first created that both return the same document type (here contacts). The first query returns the companies from Germany ...

e Contacts GE	R	
ription		
ry Company : C	Country = "Germany"	
		×

... and the second query the companies from Switzerland (2 hits):

中立日

ХК	Con	takte D-	+CH (2 Ergebnisse)			🗙 🔍 Profi-Su	che	₽☆⊟
0	V		🛃 📓 🥑		Filter		Auswahl	▽ ▲
		Kunden	Firmenname	PLZ	Ort			
	1	JS	Jahnke Services GmbH	4010	Basel	Abfrage -	Kontakte D+CH	
	2	SG	Schäfer AG	8002	Zürich	Name Beschreibung		
						Abfrage	Kontakt : Land = "Schweiz"	

The final query is then saved under a new name (here "Contacts D+CH") and the first query is added to the "Add result of other queries" field. The hit list now shows all contacts from Switzerland Germany and Switzerland (11 hits):

AD	ofrag	ge nacl	h Kontakt (11 Ergebnis	se)			X 🔍 Profi-Suc	he					
		e 🔒	🛓 🙀 🞯		Filter		🖹 💽 🛓	🔒 📄 客 🔍	Abfrage starten	Auswahl			
	К	unden	Firmenname	PLZ	Ort	Ка							
1	1 35	s	Jahnke Services GmbH	4010	Basel	Lie	Abfrage						
2	2 5	G	Schafer AG	8002	Zürich	Ku	Name	Kontakte D+CH					
3	3 C	s	Consult Systeme AG	80400	München	Ku	Beschreibung						
4	4 M	IAB	Meier Anlagenbau Gm	10120	Berlin	Ku			ontakt : Land = "Schweiz"				
5	5 M	IMT	Meier Medizintechnik	10120	Berlin	Pa	Abfrage	Kontakt : Land = S					
6	6 M	IMT	Meier Messtechnik G	20065	Hamburg	Ku							
7	7 S	HC	Shift Consulting AG	55120	Mainz	Lie							
8	8 A	в	Autobau AG	80030	München	Ku							×
9	9 A	B	Maschinenbau GmbH	70020	Stuttgart	Ku							
10	0 C	SW	Consult Software GmbH	20012	Hamburg	Ku							
11	1 0	BG	Consult Beratung GmbH	80130	München	Ku							
							11 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Dokumenttypen		Dokument-Felde	r.	Feldwer	
								Kontakt	▼	Land		🗢 👔 Deutscl	hland 🗢
							- E Report						
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							Ergebnis ander	er Abfragen hinzufü	gen				~
									E @-	Bezeichnung			
									E 1	Kontakte D			

Note: The query Contact: Country = "Germany" OR Country = "Switzerland" results in the same hit list.

Result of a query as parameter of a second list

If a query becomes too complex, you can split it into several parts, each of which is easier to create and faster to execute. For example, employees with certain skills should be searched for, whose units fulfill certain conditions (here certain cost centers).

First, a query is created that returns the selected units and is saved:

06.0	08.2021 12:19:00) (2 Re	sults)		X Search	K ⊲ Search					
7	۵ 🖬 🔺 ն	1.1		Filter		SP StartQuery New query Selection					
	Description	Activ	Unit managers	Cost center							
1	Entwicklung	N.	Dohle Hannah,	200 - Entwicklung	Name	Selected Units					
2	Support		Jahnke Kevin	400 - Support							
					Description						
					Query	Unit : Active = "1" AND ('Cost center' = "400 - Support" OR 'Cost center' = "200 - Entwicklung")					

The next step is to create another query that returns selected employees (all active employees who have assigned "training" as soft skill).

× of	5.08	8.2021 14:48:20	2 Results)			🗙 🔍 Search		☆☆目
10 6	0	😂 💼 🏝 😰	X	Filter.			Selection	
	1	Name	First name	Personnel number	Function			
	1 :	Schmidt	Paula	018	Berater	- Cuery		
	2	Meier	Jana			Name Description		
						Lookup Docu	Employee : 'Active user' = "1" AND 'Soft skills' CONTAINS "training" ment types Document fields Field values sloyee	X

After saving, you can use the "Selected_Units" query for the "Load parameters for other queries" field (as shown below):

× Abf	rage nach Mit	arbeiter (6 l	Ergebni	isse)	X 🔍 Profi-Suche	⊕☆∃
	Ame A	Vorname	aktin	Filter	Auswahl Ausgewählte Mitarbeiter	
1	Klaube	Ute		Developer	Abfrage	
	Schmidt	Norbert		Manager	Name Ausgewählte Mitarbeiter	
	Schneider	Maria		Consultant	Beschreibung	
					Abfrage Mitarbeiter : "aktiver Benutzer" = "1" AND Soft-Skills CONTAINS "Training" AND Unit CONTAINS \$Parameter	~ 1
					Report Kombination	
					Parameter aus anderer Abfrage laden Parameter 🗢 🐼 Ausgewählte Units 🗢	
					Ergebnis anderer Abfragen hinzufügen	

The system first executes the query "Selected_Units" and returns 3 hits in the example. For each of the 3 units, the query "Selected_Employees" is executed once and the unit is entered and used for the parameter "\$Parameter".

10.3 Report Designer

With the help of the Report Designer, you can prepare the results of the queries or most standard evaluations (see Help, Part 9) in tabular or graphical form and export them if necessary. As output format CHART (for graphical evaluations), CSV (for interfaces), DASHBOARD, EDIT (for editing master data), HTML, LIST (list view within Projectile), PDF, RTF (standard format for word processing), XLS and XLSX (MS EXCEL) and XML are available.

10.3.1 Tabular Reports

To create a new report for a query (here the example "IDS - Project List"), the Report Designer is called up with the [Minimal Report]. The minimal report contains only a few columns. The alternative [Standard report] contains all co-lumns and is more suitable for small tables.

🗙 🔍 Search		℃☆目
	SP R StartQuery New query Selection IDS - Project List	
- E Query -		
Name	IDS - Project List	
Description		
Query	Project : (Status = "Active" OR Status = "Advance") AND 'Parent project' = "" AND 'External project' = "1"	
		_
		×
Lookup Docu	Iment types Document fields Field values	
Proj		
- E Report -		
Report	[MinimalReport]	
Format		

The Report Designer will then open. When selecting [Minimal- report] for the type "Project", only the fields "Int._Key", "Project-No." and "Name" will be preset. The Designer consists of the areas for "Data", "Diagram", "Format", "Key figure" and "Import". In the "Data" area, the fields of the table are selected, formulas can be stored, data of the fields can be aggregated as well as grouped and sorted. The "Diagram" area is used for the graphical reports and the dashboards and "Format" is used to format the columns.

		er Project Projek Dokument • E												-0
llgemein	Layout	Kennzahlen	CSV XLS	OpenOffice Di	agramr	n	Sonsti	iges						
Name Pro	oject		Titel	Projekt										
Spalten														
- ÷			1	Daten						Diagramm		F	format	
		Feldname	Formula	Aggregatfunktion	Grup	Seite	Sicht	Sortierung	Aufst	Diagramm	Beschriftung	Format	Breite [%]	Breite [px]
	III	int,_Schlüssel		0 - keine	1		V		V				0	0
	2 111	Projekt-Nr,		0 - keine	1		V						0	0
	3 III	Bezeichnung		0 - keine									0	0
				0 - keine			V		V					
				0 - keine										
				0 - keine										
				0 - keine			V							
۲				0 - keine	0	1	1							

The report is named (here "Project"), the title of the evaluation is defined (the later headline in the report) and saved.

溁	×.	4 \$P	Document +	Edit -												
isic in	forma	tion	Layout Fig	ures CSV	XLS OpenOffice	Diagra	am	Actio	ns							
lame	Proje	ect			Title Project Overvie	M										
olum																
-	() • (j				Data	1					Diagram			Format		
			FieldName	Formula	Aggregate	Grou	u Pag	e Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]	P
	1	38	InternalKey		AGG_NO									0	0	N
	2	38	Number		AGG_NO									0	0	N
	3	38	Description		AGG_NO	1	m							0	0	1
					AGG_NO											1
					AGG_NO											1
					AGG_NO		1									1
					AGG_NO											1
۲					AGG_NO		0									N

You can remove fields that are not needed in the report...

asici	infor	mation	Layout	Figures	CSV	XLS	OpenOffice	Diagra	m	Acti	ons							
Name	e Pr	roject				Title Pr	oject Overview		-									
	mns																	
	@·	-					Data						Diagram		F	Format		
			FieldNam	ie I	Formula		Aggregate	Grou	Page	e Visit	o Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]	F
		Column	IS				AGG_NO			V		7				0		1
		New					AGG_NO					V				0	0	1
	2	Cut					AGG_NO			V		V				0	0	
_	-	Сору										_						_
	0	Paste					AGG_NO			V								1
		Remove					AGG_NO			V		V						1
	-	Invert					AGG_NO			V								1
	0	Find					AGG_NO			V								1
۲	-	Print					AGG_NO			V		V						1
	∎ ▲ ••• •••	Report ListToDoo ToOvervie More Clear Filter																

... and add any number of new fields. To do this, simply select the required field in the "Field name" selection.

	inform	ation	Layout Figur	res CSV	XLS	OpenOffice	Diagra	m	Action	15							
lame	e Pro	ject			Title Pr	oject Overview											
olur	mns																
						Data						Diagram		,	Format		
			FieldName	Formula		Aggregate	Grou	Page	Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]	P
	1		 Number			AGG_NO					V				0	0	1
	2		 Description			AGG_NO					V				0	0	1
			1	~		AGG_NO											١
			(AccessRights)														1
			(AccessRightsInte	ernal)													1
			(AlreadyVoted)								V						1
٠			(Flyer)														1
			(Formula)														
			(PeriodDays)														
			(PeriodEnd)														
			(Periods)														
			(PeriodStart)														

In the example the fields "Customer", "Unit", "Status", "Begin Planning" and "Plan End" are selected and saved.

_			er Project												-1	DI
	2	凝凝	SP Docum	nent + Edi	it • Actions •											
sic in	nforma	ation	Layout Figure	s CSV	XLS OpenOffice	Diagra	m	Actio	ns							
lame	Proj	ect List			Title Project Overview											
olum	ins															
	<u>ه</u> -				Data						Diagram			Format		
			FieldName	Formula	Aggregate	Grou	Page	Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]	
	1	38	Number		AGG_NO			V		1				0	0	0
	2	38	Description		AGG_NO					1				0	0	0
3	3	38	Customer		AGG_NO		•			V				0	0	0
	4	38	Unit		AGG_NO									0	0	0
	5	38	Status		AGG_NO									0	0	0
	6	38	Begin_planning		AGG_NO					V				0	0	0
			End_planning		AGG_NO									0		0

In the next line a formula is defined ...

	Rep	ort	design	er Project												-0-
	2		₩ ₩.	SP Docum	ment + Edit + Actions +											
sic i	nfor	ma	tion	Layout Figure	es CSV XLS OpenO	ffice Diagram	Act	ions								
	-	roje	ct List		Title Project Ove	rview										
	nns	-				Data						Diagram		1	Format	
				FieldName	Formula	Aggregate	Grou	Page	Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Wid
		1	38	Number		AGG_NO			V		V				0	
		2	38	Description		AGG_NO		E	1						0	
3		3	38	Customer		AGG_NO									0	
3		4	38	Unit		AGG_NO			V						0	
		5	38	Status		AGG_NO			V		V				0	
		6	38	Begin_planning		AGG_NO			V		V				0	
		7	38	End_planning		AGG_NO			V						0	
	E	8	38	(Formula)	Planning_time - Actual_time	AGG_NO										
		9	38	Planning_time *		AGG_NO					1					
	1	10	38	Actual_time *		AGG_NO		m	1							

... Planning Time - Actual Time (Please note upper and lower case letters and spaces!) and then a further field "expected remaining effort" added. Afterwards you can enter the field names in the column "Label" (for the formula) or adapt them for existing fields (e.g. "customer" becomes "client").

	Report	designer Project												-0-
	2 3	🗱 🗮 🙀 SP	Document + Edit + Action	ns •										
sic i	nformat	tion Layout	Figures CSV XLS	OpenOffice	Diagram	Ac	ctions]						
lame	Proje	ct List	Title Pro	ject Overview										
olun	nns													
•				Data						Diagram		I	ormat	
		FieldName	Formula	Aggregate	Grou	Page	Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]
1	38	Number		AGG_NO			7		V				0	C
2	38	Description		AGG_NO									0	C
3	🔠	Customer		AGG_NO							Client		0	C
4	38	Unit		AGG_NO			V		V				0	C
5	38	Status		AGG_NO									0	C
6	🔠	Begin_planning		AGG_NO									0	(
7	38	End_planning		AGG_NO			1		V			1	0	(
8	38	(Formula)	Planning_time - Actual_time	AGG_NO							Difference			
9	38	Planning_time *		AGG_NO							Plan			
10	38	Actual_time *		AGG_NO			1		V		Actual			
11	38	Estimated_rem		AGG_NO							Rest			

Finally, it is first sorted by "Client" and then by "Project No." and also grouped according to the first sorting criterion. In the report, subtotals per group (in this case the client) are also created as standard.

	2	常 端. 🛃 SP	Document • Edit • Actio	ns •										
sic i	nforma	tion Layout	Figures CSV XLS	OpenOffice	Diagram	A	ctions	F)						
lame	Proje	ct List	Title Pro	ject Overview										
olun	nns													
-				Data						Diagram		F	format	
		FieldName	Formula	Aggregate	Grou	Page	Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]
1	38	Number		AGG_NO			V	2	V				0	
2	38	Description		AGG_NO									0	
3	38	Customer		AGG_NO				1			Client		0	
4	38	Unit		AGG_NO			V	1	V				0	
5	38	Status		AGG_NO									0	
6	38	Begin_planning		AGG_NO									0	
7	38	End_planning		AGG_NO			V						0	
8	38	(Formula)	Planning_time - Actual_time	Agg_Sum							Difference			
9	38	Planning_time *		Agg_Sum							Plan			
10	38	Actual_time *		Agg_Sum			7				Actual			
11	38	Estimated_rem		Agg_Sum			V				Rest			

After saving and closing the report, the "Report" selection box in the Query Manager must be updated, the report assigned ...

- E Report		
Report	Project List	▽ 😡
Format		~

... and an output format can be selected. In the example "List" is selected as format to generate the report as a list in the system.

Lookup Document types	Document fields		Field values	
	▽ 👔	⊽ 1	♥ 1	
⊟ Report	-			
Report	Project List 😒 😼			
Format	4			
ShowParameters				
show Figure parameters	CHART			
Show query name	CSV DASHBOARD			
	EDIT			
ShowDescription	HTML			
ShowDescriptionInParameterDialog	LIST			
Chart period	OPENOFFICE			
	PDF			
Start	RTF En	d	0	
Period	VIEW			

"Start query" ...

🗙 🔍 Search						⊕☆≡
	P StartQuery New query Selection	IDS - Project List				
- Query						
Name IDS - Project Li	st					
Description						
Query Project : (State	us = "Active" OR Status = "Advance") AND 'P	arent project' = "" AND 'Exte	mal project' = "1"			
					×	
		2012				
Lookup Document types	Document fields		d values			
Project	♥ 1	♥ 1		⊽ 1		
E Report						
Report	Project List 🗢	😰 🐔				
Format						

... then generates the evaluation in the system. The query first determined all active customer projects and pre-production projects and then prepared these projects with the defined report definition.

The columns in the report correspond to the rows in the report definition, the projects are sorted and grouped by customer and provided with subtotal and grand total.

PDF	XLS										
9	2									Proj	ect Overview
	Number	r Description	Client	Unit	Status	Begin planning	End planning	Difference	Plan	Actual	Rest
	1 005	Einführung EPM	ATB Autobau AG	Beratung	Advance	05.12.2019	10.03.2020	189,75	216,00	26,25	212,00
	2 025	Einführung EPM	ATB Autobau AG	Entwicklung	Active	08.01.2020	24.02.2020	232,00	232,00	0,00	232,00
3	3 050	Demo 12	ATB Autobau AG	Entwicklung	Active	05.05.2020	30.07.2020	24,83	40,00	15,17	12,00
3	4 058	Einführung EPM	ATB Autobau AG	Beratung	Active	15.06.2020	21.07.2020	256,00	256,00	0,00	256,00
3	5 067	Tickets	ATB Autobau AG	Beratung	Active	04.08.2020	31.08.2020	16,00	24,00	8,00	16,00
3	6 019	Entwicklung Mo	CSB Consult Be		Active	09.12.2019	19.12.2019	8,50	27,00	18,50	0,00
	7 061	Einführung EPM	CSB Consult Be	Entwicklung	Active	22.06.2020	30.10.2020	256,00	256,00	0,00	256,00
	8 001	Entwicklung Mo	CSH Consult AG	Entwicklung	Active	02.12.2019	31.01.2020	217,25	288,00	70,75	218,00
	9 002	Entwicklung Mo	CSH Consult AG	Entwicklung	Active	04.12.2019	24.01.2020	161,75	230,00	68,25	179,00
	10 003	Entwicklung Mo	CSH Consult AG	Entwicklung	Advance	09.12.2019	28.02.2020	177,50	230,00	52,50	184,00
	11 011	Entwicklung Mo	CSH Consult AG	Entwicklung	Advance	02.01.2020	27.03.2020	228,00	242,00	14,00	232,00
	12 014	Einführung Proj	CSH Consult AG	Beratung	Active	06.12.2019	25.01.2020	197,00	224,00	27,00	200,00
	13 045	Einführung EPM	CSH Consult AG	Firm 1	Active	12.03.2020	21.04.2020	179,50	214,00	34,50	188,25
	14 022	Einführung Fibu	CSS Consult Sof	Firm 1	Active	08.01.2020	05.09.2020	244,00	358,00	114,00	268,00
	15 047	Einführung EPM	CSS Consult Sof	Entwicklung	Active	13.02.2020	11.07.2020	387,00	444,00	57,00	330,50
	16 072	Testprojekt	CSS Consult Sof	Beratung	Active	28.08.2020	13.11.2020	360,00	360,00	0,00	360,00
	17 031	Katalogprojekt	MBG Maschinen	Beratung	Active	29.01.2020	30.04.2020	219,50	232,00	12,50	0,00
	18 009	Beratung "Einka	PBA Privatbank	Beratung	Advance	05.12.2019	29.02.2020	120,00	120,00	0,00	40,00
1	19							3.474,58	3.993,00	518,42	3.183,75

In the Report Designer you can use not only the direct fields of the table, but also referenced data. For this purpose, a field name with the ending "..." is selected. Only in these fields there are references (as in the field "Customer ..." which points to the contact mask). By clicking the button "..." the fields of the referenced mask are loaded and ...

📃 3 🔠 Description	AGG_NO		0	0 None	
Customer	AGG_NO		0	0 None	

... you can select them. In the example, the corresponding customer number is to be displayed for the client of the projects.

3**	Description	AGG_NO	1	10	V			0	0	None	1	V
4 🔠	Customer.Vendor_number	AGG_NO			V	V		0	0	None		E

You can then drag and drop the field to another position. In the example, the new field "Customer.Vendor_number" is moved from the last line to the four lines behind the field "Customer".

1.000	2	激激	SP Document - E	dit + Actions +														
sici	nform	ation	Layout Figures CSV	XLS Oper	Office Diagram	Actio	ons											
ame	Proj	ject List2		Title Project														
olur	nns																	
	@+				Data						Diagram		1	format		Figure		
			FieldName	Formula	Aggregate	Grou	u Page	Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]	Periodic	Flat	1
3	1	28	InternalKey		AGG_NO	10	0	1		V				0	0	None	1	
3	2	28	Number		AGG_NO	0	E			V				0	0	None		
3	3	38	Description		AGG_NO		13	7		V				0	0	None	0	
3	4	38	Unit		AGG_NO					V						None		
7	5	O 1 se	elected row Vendor_number		AGG_NO					V				0	0	None		
			1	1	AGG_NO		E			V						None		T
					AGG_NO	10	E									None		
					AGG_NO	E	E									None	0	
					AGG_NO	10	E									None	13	
۲					AGG_NO	10	E									None		

In the next example, the "Status" field is to be highlighted with the value-dependent formatting "Status colors".

	2	英 奥	👍 \$P Document + Er	fit - Actions -														
sic i	inform	ation	Layout Figures CSV	XLS Oper	nOffice Diagram	Actio	ons											
ame	Proj	ect List2		Title Project														
olun	nns																	
-	0-				Data						Diagram			Format		Figure		
			FieldName	Formula	Aggregate	Grou	Page	Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]	Periodic	Flat	1
3	1	38	InternalKey		AGG_NO	1		1		V				0	0	None	0	
3	2	28	Number		AGG_NO	0	E			V				0	0	None		
3	3	38	Description		AGG_NO	10	10			1				0	0	None	0	
3	4	38	Customer.Vendor_number		AGG_NO	1	1			V				0	0	None	1	
3	5	28	Unit		AGG_NO	10	E			1						None	10	
3	6	28	Status		AGG_NO											None		
-			ValueBasedFormat		AGG_NO	8	6	1								None	15	
					AGG_NO	10	0									None	1	
					AGG_NO	0	10									None	10	
					AGG_NO	0	1									None	6	
۲					AGG_NO	0										None	10	ĥ

In the dialog you can set the comparison operators and the operand in the field "Comparison". The values can either be converted to text (text) or color (foreground or background color).

Fixed value Image: Comparison of the	Hide
Image: State	×
	×
Fixed value C S S S S S S S S S S S S S S S S S S	×
Fixed value	*
Fixed value	×

In the example the field "Status" ...

Compare		Operand	Mode		Negate	Case	Text	Foreground	Background		Hide
Equal	~	Active	Expression				Order missing		#FF6600	~	
Equal		Adcance	Expression	\bigtriangledown			Assigned	×	#99CC00	~	
3	\$		Fixed value	Ŷ				×		~	
3	Q		Fixed value	Þ				×		~	5
3	9		Fixed value	\bigtriangledown	8	8		×		~	
alue	Operand Access denied										
cess											
ccess enied aN	NaN										
	NaN Infinity										

... set the value "active" (internally "Active") to green background and change the text to "Commissioned". the value "Advance" (internal "Advance") is provided with an orange background and the text is changed to "Order missing".

Comparison operators are currently supported:

No.	Operator	Description
1	starts with	Check if the field content starts with the value.
2	ends with	Check if the field content ends with the value.
3	contains elements	Field contains a multiple selection.
4	contains text	Check if the field content contains the value.
5	equal	Checking the field content for equality.
6	bigger	Check if field content is greater than the value.
7	bigger or equal	Check if field content is greater or equal to the value.
8	smaller	Check if field content is smaller than the value.
9	smaller or equal	Check if field content is smaller or equal to the value.
10	unequal	Checking the field content for inequality.
11	refers to	Check documents for links to other documents.

The result of the two examples (loading information from referenced tables and value-based formatting):

PDF XLS					
Project					
InternalKey	Number	Description	Vendor number	Unit	Status
1	001	Entwicklung Modul B0	2809	Entwicklung	Order missing
10	005	Einführung EPM		Beratung	Advance
13	011	Entwicklung Modul B	2809	Entwicklung	Advance
14	009	Beratung "Einkauf und Beschaffung"		Beratung	Advance
17	014	Einführung Projectile	2809	Beratung	Order missing
2	002	Entwicklung Modul A	2809	Entwicklung	Order missing
22	019	Entwicklung Modul J	4781		Order missing
25	022	Einführung Fibu		Firm 1	Order missing
28	025	Einführung EPM		Entwicklung	Order missing
3	003	Entwicklung Modul C	2809	Entwicklung	Advance
34	031	Katalogprojekt		Beratung	Order missing
38	047	Einführung EPM		Entwicklung	Order missing
48	045	Einführung EPM	2809	Firm 1	Order missing
52	050	Demo 12		Entwicklung	Order missing
60	058	Einführung EPM		Beratung	Order missing
62	061	Einführung EPM	4781	Entwicklung	Order missing
68	067	Tickets		Beratung	Order missing
73	072	Testprojekt		Beratung	Order missing

You can adapt existing reports at any time. The query is selected, the corresponding report definition is opened and modified. In the following example three additional fields are added to the existing report ...

	۰.					Data						Diagram			Format		Figur	e		
				FieldName	Formula	Aggregate	Grou	u Pag	e Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]	Periodic	Flat	Is in	Impc Lo
	1		195	InternalKey		AGG_NO	10	1							0	0	None		V	8
	2			Number		AGG_NO	10	E							0	0	None	10		
B	3			Description		AGG_NO	0	1							0	0	None		1	8
8	4			Customer.Vend		AGG_NO	10	E							0	0	None	10	0	0
	5			Unit		AGG_NO	E	E	1						0	0	None	0	E	E
8	6	[Status		AGG_NO	0	0	1						0	0	None	0		
1	7			Order_value *		AGG_NO	E	1	1						0	0	None	6	6	0
6	8			Invoice_value *		AGG_NO	10	0							0	0	None		E	8
-	9			(Formula)	Order_value - I	AGG_NO	121	193	101		121				0	0	None	173	12	100
						AGG_NO	10	101			1						None	10	123	10

... assigned: "order value", "invoice value" and a formula.

X 🗢 Projec	t List2							
PDF XLS								
Project								
rioject								
InternalKey	Number	Description	Vendor number	Unit	Status	Order value	Invoice value	Column 9
1	001	Entwicklung Modul B0	2809	Entwicklung	Order missing	140.231,11	416,00	139.815,1
10	005	Einführung EPM		Beratung	Advance	24.720,00	8.720,00	16.000,0
13	011	Entwicklung Modul B	2809	Entwicklung	Advance	0,00	0,00	0,0
14	009	Beratung "Einkauf und Beschaffung"		Beratung	Advance	0,00	0,00	0,0
17	014	Einführung Projectile	2809	Beratung	Order missing	38.790,00	8.420,56	30.369,4
2	002	Entwicklung Modul A	2809	Entwicklung	Order missing	29.580,00	0,00	29.580,0
22	019	Entwicklung Modul J	4781	-	Order missing	0,00	0,00	0,0
25	022	Einführung Fibu		Firm 1	Order missing	51.950,00	0,00	51.950,0
28	025	Einführung EPM		Entwicklung	Order missing	0,00	0,00	0,0
3	003	Entwicklung Modul C	2809	Entwicklung	Advance	27.080,00	0,00	27.080,0
34	031	Katalogprojekt		Beratung	Order missing	0,00	0,00	0,0
38	047	Einführung EPM		Entwicklung	Order missing	47.780,00	30.000,00	17.780,0
48	045	Einführung EPM	2809	Firm 1	Order missing	37.490,00	4.336,15	33.153,8
52	050	Demo 12		Entwicklung	Order missing	4.200,00	0,00	4.200,0
60	058	Einführung EPM		Beratung	Order missing	26.680,00	0,00	26.680,0
62	061	Einführung EPM	4781	Entwicklung	Order missing	19.160,00	16.280,00	2.880,0
68	067	Tickets		Beratung	Order missing	0,00	0,00	0,0
73	072	Testprojekt		Beratung	Order missing	20.790.00	0,00	20.790,0

10.3.2 Set Permissions

When the report is finished, you must assign authorizations to the report (analogous to the queries). You can view and change the permissions in the menu "Edit - Permissions".

🗙 🔝 Report designer Project		-D☆=
📄 💥 🗮 💊 SP Document •	Edit •	
Basic information Layout Figu	Access rights OpenOffice Diagram Actions	
Basic information Layout Figu	Access rights OpenOffice Diagram Actions	
Name Project	Title Project	

The creator of the report is preset as "owner", the other permissions must be set by the creator. In the example the administrators, like the owner, get the highest permission and a composite group "Poweruser" gets the permission level "2 - Read". All other users do not get permission to query:

Owner	Schaub Peter	All rights	\bigtriangledown
Relatives	01 - Administration	All rights	
riends	Poweruser "Alle internen Grupper 🗢	Read	\bigtriangledown
Other use	rs	Access denied	\bigtriangledown

10.3.3 Periodic Reports, Key Figures

All shown examples show the current data. Often, however, evaluations on de-

fined key dates (until the end of the month, ...) or periodic evaluations (last quarter per month, next month per week, ...) are required. In the system, so-called key figures are available for the central objects "contact", "employee", "project", "work package".

Key figures are consolidated values that can be calculated from document data or other key figures using algorithms and that describe a document. Each key figure is assigned an ID for unique identification.

The use of key figures in Projectile allows the user to create total values, values at any time and values for any period. The values generated by a key figure are assigned a creation date so that they can be stored and reused without the need for recalculation. Furthermore, each key figure can be assigned to a document, which can be used to integrate key figures into screen views and reports.

The following example shows the use of key figures in the context of a periodic evaluation. First the query about the active customer projects is loaded and ...

X 🔍 Search		-口 ☆ 三
	Selection IDS - Project List	
Name	IDS - Project List	
Description		
Query	Project : (Status = "Active" OR Status = "Advance") AND 'Parent project' = "" AND 'External project' = "1"	
		×
Lookup Doc	ument types Document fields Field values	
Report	[MinimalReport]	
Format		
ShowParam	eters 🔤	

... then a new report is created:

	2	英 浅	. 👍 \$P Docur	ment • Edit • Act	ions +														
asic i	nform	ation	Layout Figure	es CSV XLS	OpenOffice	Diagra	m	Actio	ns										
				-															
lame		ect List	(periodical)	Title P	oject														
Colun																			
E	٥.				Data						Diagram			Format		Figure			
			FieldName	Formula	Aggregate	Grou	Page	: Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]	Periodic	Flat	Is in	Impc I
2	1	28	InternalKey		AGG_NO			1		V				0	0	None		V	
2	2	38	Number		AGG_NO	0	8	V		V				0	0	None		V	
2	3	28	Description		AGG_NO	E								0	0	None		V	
2	4	38	Customer		AGG_NO	E	E					Customer		0	0	None		E	
2	5	38	Status		AGG_NO	E	E			V				0	0	None		E	
2	6	38	Unit		AGG_NO	E	E			V				0	0	None		E	8
2	7	38	StartDate		AGG_NO	E	8			V				0	0	None		0	
2	8	28	EndTime		AGG_NO	E	8	V		V				0	0	None		E	
3	9	38	Planning_time *		Agg_Sum		0			V		Planning Time [h]				Periodic		0	
2	10	28	Actual_time *		Agg Sum	0	1					Actual Time [h]				Periodic	1	m	8
2	11			Planning time	Agg_Sum	0	8					Difference [h]				Periodic		m	0
	12	28			Agg Sum	0	8	V				Rest [h]		0	0	Periodic	6	0	
	-	_	(Periods)		AGG NO	0	8	V						0		None		0	8

Here the key figures are in the column "Field name", there they can be recognized by an asterisk. Once you have decided on one or more key figures, it is necessary to select "(Periods)" in the same column.

The periodic treatment of the selected key figures is then defined in the rows (column Key figure - Periodic), meaning

"Total" - the absolute value (as without delimitation),

"Periodic" - time limitation of the value to the selected period,

"Accumulated" - Addition of the values of a period with the values of the previous period,

"Sum" - the sum of the periodic values in the observation interval

In the "Key figures" tab, enter the period under consideration in the "Time interval" field and the period in the "Interval" field. In addition, you can also set the "Maximum age of the key figures" here (0h means current calculation, 24h means the key figures can be up to 24 hours old).

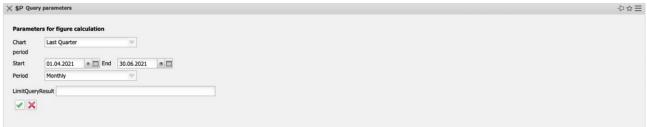
X 🔲 Report desi	gner Project	List (perior	dical) Pr	oject				
🗎 😫 🛓 💥	🗮 💽 SP	Documen	t • Edi	t - Act	ions •			
Basic information	Layout	Figures	CSV	XLS	OpenOffice	Diagram	Actions	
Time interval	Last Quarter				01.04.2021	0	30.06.2021	•
Interval	Monthly							
Max figures age		24 h						
BulkOptimizer								
BulkSize		20						

After saving and closing the report ...

Report					
Report	Project List (periodical)	▽ 🛃	3		
Format					
ShowParameters	0				
show Figure parameters					
Show query name					
ShowDescription					
ShowDescriptionInParameter	Dialog 📃				
Chart period	Last Quarter	Ψ.			
Start	01.04.2021 🛛 🖂	End	30.06.2021 🛛 🗉		
Period	Monthly				

... you must update the "Report" selection box in the Query Manager, assign the report and enter the evaluation period. Most of the time the evaluation period in the report is the same as in the query.

If the report is then created with "Start query", an intermediate dialog appears first. Here you can change the analysis interval and the period and confirm with the green tick ...



...the report can be started. Projectile delimits in the report the four selected key figures "Plan[h]", "Actual[h]", "Difference[h]" and Rest[h]" over the three months of the last quarter:

C Projec	t List (peri	iodical)																	中口日
PDF XLS																			
Project																			
InternalKey	Number	Description	Company	Status	Unit	StartDate	EndTime	Planning Time [h] 04/21	Actual Time [h] 04/21	Difference [h] 04/21	Rest [h] 04/21	Planning Time [h] 05/21	Actual Time [h] 05/21	Difference [h] 05/21	Rest [h] 05/21	Planning Time [h] 06/21	Actual Time [h] 06/21	Difference [h] 06/21	Rest [h] 06/21
1	001	Entwicklung Modul B0	CSH Consult AG	Active	Entwicklung	05.12.2019	1,00	0,00	0,00	0,00	218,00	0,00	0,00	0,00	218,00	0,00	0,00	0,00	218,0
10	005	Einführung EPM	ATB Autobau AG	Advance	Beratung		1,00	0,00	0,00	0,00	212,00	0,00	0,00	0,00	212,00	0,00	0,00	0,00	212,0
13	011	Entwicklung Modul B	CSH Consult AG	Advance	Entwicklung	29.12.2019	1,00	0,00	0,00	0,00	232,00	0,00	0,00	0,00	232,00	0,00	0,00	0,00	232,0
14	009	Beratung "Einkauf und Beschaffung"		Advance	Beratung		1,00	0,00	0,00	0,00	40,00	0,00	0,00	0,00	40,00	0,00	0,00	0,00	40,0
17	014	Einführung Projectile	CSH Consult AG	Active	Beratung		1,00	0,00	0,00	0,00	200,00	0,00	0,00	0,00	200,00	0,00	0,00	0,00	200,0
2	002	Entwicklung Modul A	CSH Consult	Active	Entwicklung	05.03.2020	0,00	0,00	0,00	0,00	179,00	0,00	0,00	0,00	179,00	0,00	0,00	0,00	179,0
22	019	Entwicklung Modul J	CSB Consult Beratung GmbH	Active			1,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,0
25	022	Einführung Fibu	CSS Consult Software GmbH	Active	Firm 1		0,50	0,00	0,00	0,00	268,00	0,00	0,00	0,00	268,00	0,00	0,00	0,00	268,0
8	025	Einführung EPM	ATB Autobau AG	Active	Entwicklung		1,00	0,00	0,00	0,00	232,00	0,00	0,00	0,00	232,00	0,00	0,00	0,00	232,0
8	003	Entwicklung Modul C	CSH Consult	Advance	Entwicklung		1,00	0,00	0,00	0,00	184,00	0,00	0,00	0,00	184,00	0,00	0,00	0,00	184,0
14	031	Katalogprojekt	MBG Maschinenbau GmbH	Active	Beratung		1,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,0
8	047	Einführung EPM	CSS Consult Software GmbH	Active	Entwicklung	13.02.2020	0,85	0,00	0,00	0,00	330,50	0,00	0,00	0,00	330,50	0,00	0,00	0,00	330,5
8	045	Einführung EPM	CSH Consult AG	Active	Firm 1		0,97	0,00	0,00	0,00	188,25	0,00	0,00	0,00	188,25	0,00	0,00	0,00	188,2
52	050	Demo 12	ATB Autobau AG	Active	Entwicklung		1,00	0,00	0,00	0,00	12,00	0,00	0,00	0,00	12,00	0,00	0,00	0,00	12,0

10.4 Dashboard Builder

With the help of the Dashboard Builder you can create dashboards with main and detailed evaluations. The Dashboard Builder is a paid extension of the ReportMaker.

The following example shows how to use the Dashboard Builder. First the query about the active customer projects is loaded and ...

		むな目
🖹 🚘 🚨 📑 🛯 SF	P StartQuery New query Selection IDS - Project List	
Query		
Name IDS - Project List	t (Dashboard)	
Description		
Query Project : (Status	= "Active" OR Status = "Advance") AND 'Parent project' = "" AND 'External project' = "1"	
		×
Lookup Document types	Document fields Field values	
Lookup Document types Project	Document fields Field values	
Project		
Project Report Report		
Project Report Format	Image: State	
Project Report Report Format ShowParameters	VII VII [MinimalReport] VII	
Project Report Format ShowParameters show Figure parameters		
Project	vit vit [MinimalReport] vit	

... then a new report is created.

In the report definition only a few additional steps are necessary to create a dashboard from a tabular report. In the column Diagram the axes must be

[©] Information Desire Software GmbH

determined. In the example, the project number becomes the x-axis and the four key figures "Plan [h]", "Actual [h]", "Difference [h]" and Rest [h]" become the y-axis.

	2	漢)	🐮 🚡 SP Docur	ment • Edit • Act	ions •														
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lamo	Pro	ject Da	shboard	Title P	roject														
olur	mns																		
_	0.				Data						Diagram		F	Format		Figure			
			FieldName	Formula	Aggregate	Grou	Page	Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width [px]	Periodic	Flat	Is im	Impc L
8	1	:	InternalKey		AGG_NO	1	6		2		INDEX			0	0	None	23	1	8
	2	:	Number		AGG_NO	1	E							0	0	None	10		8
	3	:	Description		AGG_NO	1	6	1		1				0	0	None	23	1	8
	4	:	Customer		AGG_NO				1			Customer		0	0	None	0	8	
E	5	:	Status		AGG_NO	13	6	1		1				0	0	None	23	8	8
	6	:	Planning_time *		Agg_Sum		E				DATA	Planning Time [h]		0	0	None	0	8	
E	7	1	Actual_time *		Agg_Sum		8	V			DATA	Actual Time [h]		0	0	None	23	8	8
	8	:	(Formula)	Planning_time	Agg_Sum		8			1	DATA	Difference [h]		0	0	None	0	8	
0	9	:	Estimated_rem		Agg_Sum	10	8				DATA	Rest [h]				None	23	8	171

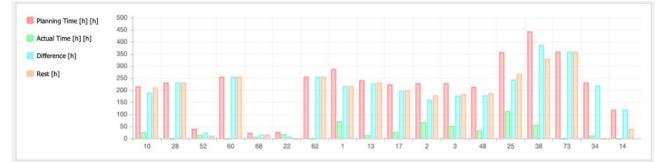
The name is less suitable as X-axis, because this field is too long.

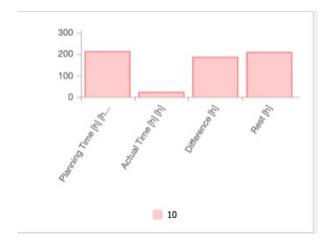
In the "Diagram" tab, the "Main Evaluation" (here bar stack) and the "Detail Evaluation" (here pie) are then selected.

🗙 📃 Report de	signer Project						₽☆⊒
×	🗮 💽 \$P	Document	• Edit • Act	tions +			
Basic informatio	n Layout	Figures	CSV XLS	OpenOffice	Diagram	Actions	
- • StaticDiagra	m						
— 🖻 DynamicDia	aram						
Chart1Type	Bar						
Chart2Type	Pie		\bigtriangledown				
ChartAnimation							

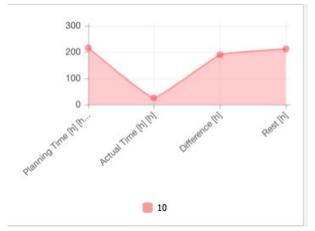
Currently, the following diagram types are available and suitable as main evaluation:

Bars and bar stacks:

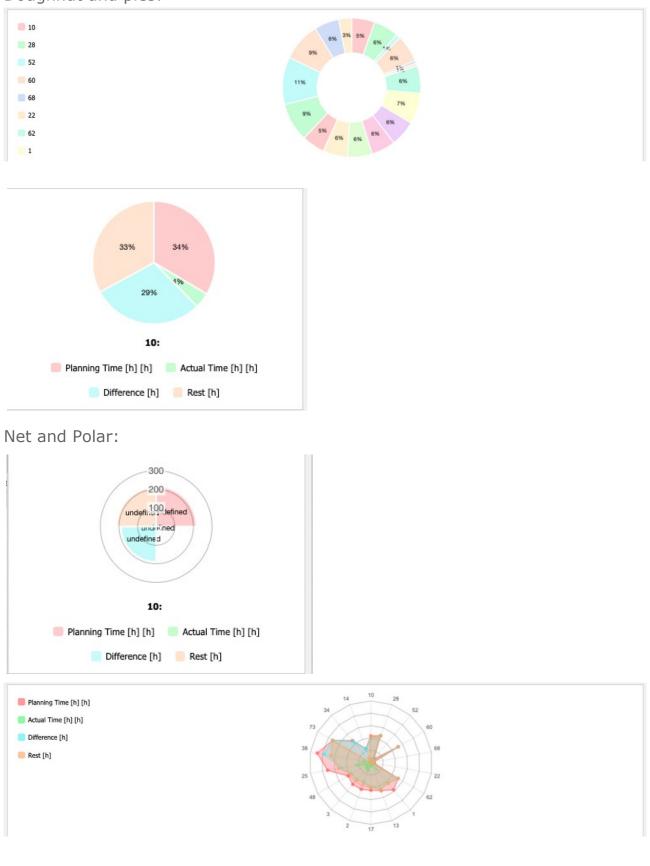








Currently, the following diagram types are suitable for detailed evaluation:



Doughnut and pies:

After saving and closing the report ...

X 🔍 Search						-口公日	Ξ
	SP 🔍	StartQuery New query Se	lection IDS - Project List		♥		
Query Name	IDS - Project List						
	105 - Project List						
Description							
Query	Project : (Status = "A	ctive" OR Status = "Advance")	AND 'Parent project' = "" A	AND 'External project' = "1"			
						×	
Lookup Doc	ument types	Document field	ls	Field values			
Pro	ject	▽ 1	▽ [1	▽ 1		
- E Report -							-
Report		Project Dashboard	- 3				
Format		DASHBOARD					
ShowParame	eters						
show Figure	parameters	m					
Show query	name						
ShowDescrip	otion						
ShowDescrip	otionInParameterDialog						
Chart period	L.		\bigtriangledown				
Start			End	0			

... click "Start query" to generate the dashboard with the 4 key figures (plan, actual, difference, rest) as a stack of bars:



10.5 Reports with an Excel Template

Projectile can generate reports in XLSX format. But it is also possible to "generate" files into already existing spreadsheets. That is you can supply existing formulas and diagrams with data from Projectile by generating a report on one sheet of the file and then generating other sheets of the existing XLSX file untouched.

Here you can see a prepared query that provides you with some work packages and outputs their results in Excel format. For this purpose also a report has been prepared (here: "JobWithExcelTemplate"). In the Report Designer (here: outlined in red) you can now take a closer look at this report.

🗙 🔩 Search		⊕☆≡
	Image: Start Query New query Selection	
- E Query -		
Name	AAA Test Ticket 32150	
Description		
Query	Job : Description LIKE "er"	<u> </u>
		×
Lookup Doci	ament types Document fields Field values	
Jot		
- = Report -		
Report	JobWithExcelTemplate	
Format	XLSX 🗢	
ShowParame	ters 🗌	

This report consists of four columns: Job Number, Description, Planning Time and Actual Time.

ic inform		渫	Angel Se Se Layout Figure	Document + Edit •		Diagra	sm	Ехро	ort Actions										-01
ime 🗍 Iumns	lobWi	thExc	elTemplate	Title	dot														
					Data						Diagram		1	Format		Figure			
			FieldName	Formula	Aggregate	Grou	Page	Visib	Sort Key	Asc	ChartData	Caption	Format	Width [%]	Width (px)	Periodic	Flat	Is im	Imp
1	1	-71	Job_number		AGG_NO	123	123	V		V				0	0	None	13	V	11
3	2	38	Description		AGG_NO	0	E							0	0	None	E	1	63
1	3	31	Planning_time *		AGG_NO	E	E							0	0	None	0	E	
1			Actual time #		ACC NO	-	-	112		1120				0	0	Nono	-		-
	_	_			ACC NO		-			100						Nono	-	-	
					AGG_NO	6	-									None			0
					AGG_NO	6	8									None	10	-	0
					AGG_NO		-									None	-		8
•																			
					AGG_NO		10	1		1						None		100	

By clicking on the icon outlined here, you can display a preview by clicking on

the icon outlined here.

imes $ imes$ JobWithExcelTemplate		
Other formats		
# Open Save File	Size	Last modified
1 JobWithExcelTemplate_2022	1021015504-11.xlsx 10,38 kB (0.627) 21.10.2022 13:55:04

After you have clicked on the page icon, the file will download and you can open it. On the first page (Sheet0) you will now find the jobs listed.

3 - D - I	a - 🗋 🖶 🗟 -	V Do 🖻	- 2	A			ABC	-		ti a	1 21	2		17	0.			A	m D <i>t</i>	= -	2	
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Job			-			-				1						<u> </u>					_	
Job number	Description	Planning time	Actual ti	ma		-	-	-	-													
001.2-3	Programmierung	t saming time	96		4		-	-		-		-		-		-				-		-
013.2-2	Programmierung		72		6		-	-														
011.2-2	Programmierung		72		6																	
008.2-2	Programmierung		72		6	1	1	-	1			1										
005.2-2	Programmierung		72		d																	
014.2-2	Programmierung		32		d																	
014.2-5	Programmierung		40		8																	
016.2-2	Programmierung		68		2																	
047.2-2	Programmierung		36		6																	
047.2-5	Programmierung		36		2					1												
019-1	Testfälle definieren		24	16	.6				1	19 - C												
020.2-2	Programmierung		72		d																	
025.2-2	Programmierung		36		d																	
025.2-5	Programmierung		36		6																	
026.2-2	Programmierung		72		d																	
029.2-2	Programmierung		72		d																	
034.2-2	Programmierung		72		d																	
032.1-4	Angebotsausdrucke erstelle	•	8		d																	
038.2-2	Programmierung		72		d																	
039.2-2	Programmierung		72		d																	
042 2.2	Programmierung		24		d																	
043.2-2 045.2-2	Programmierung		72		0																	
045.2-2	Programmierung		56		4																	
059.4-2	Programmierung		72		d																	
059.6.2-2	Programmierung		72		4																	
056.2-2 058.2-2	Programmierung		72		0																	
058.2-2	Programmierung		80		9																	
061.2-2	Programmierung		72		9																	
064.2-2	Programmierung		72		4																	
066.2-2	Programmierung		72		(_															
071.1.2-2	Programmierung		72		4	_																
071.2.2-2	Programmierung		68		9																	
076.1-2	er		0		9	-																
077.2-2	Programmierung		72		9																	
078.2-2	Programmierung		40		9	_	_															
078.2-5	Programmierung		17		Q																	
078.2-6	Programmierung		17		9	_	-															

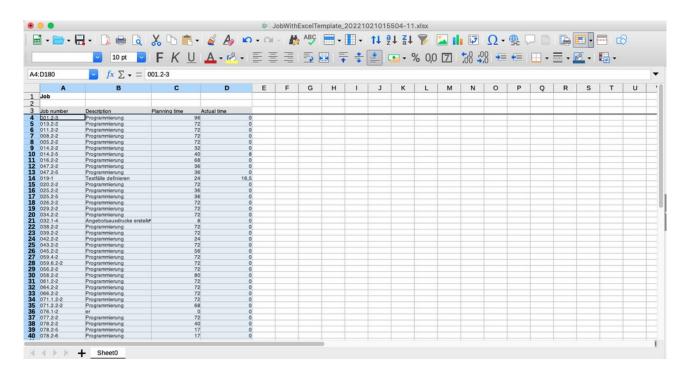
You can now continue working with the data on a second page. You e.g. create a diagram with them or use these data for further further calculations.

So that you do not have to make this effort every time you create a new report, you can save this file as a template. report, you can save this file as a template. Projectile replaces the data on the first page of the Excel file with this template, and Excel (or another Office program) then updates the graphic.

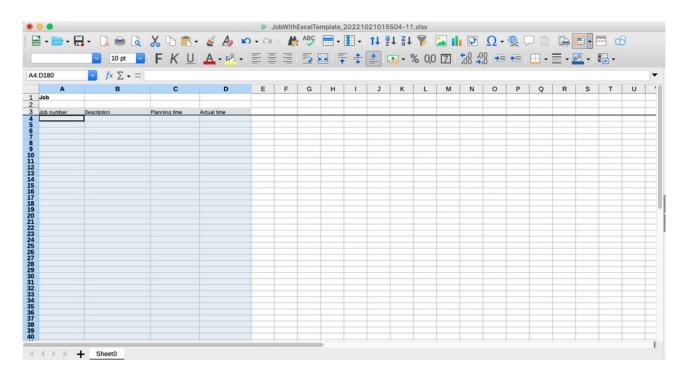
To do this, save the Excel file and store this template in the report. On the XLS tab you will find this new function and you can enter a template there. a template.

To show you that this new function really works, the data on the first page will be removed. data on the first page is removed and a data-empty template is created.

For this purpose, the data is marked...



... and deleted.



Since there is no data on the first page, the office program cannot create a

chart from it.

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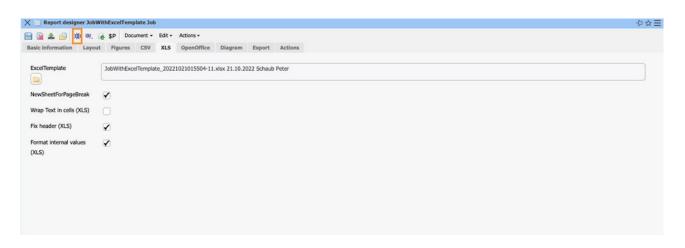
This file is now saved, uploaded and used as a template.

X 🔠 Report designer JobWithExcelTemplate Job	中公三
🔚 🖳 🚣 🧰 💥 💥 😹 🖡 P Document - Esit - Actions -	
Basic information Layout Figures CSV XLS OpenOffice Diagram Export Actions	
ExcelTemplate Image: Single	

You upload the file in the flyer...

X 🔄 Folder 81 ExcelTemplate							₽☆≡
늘 Flyer	88						
	Title		Size	Date	User	Comment	Action
P	JobWith	ExcelTemplate_20221021015504-11.xlsx	11.1 KB	Today 14:16:36	Schaub Peter		\$₽ 6 \$\$
Drag and Drop Files Here							
or Browse Files							
Please enter a comment							
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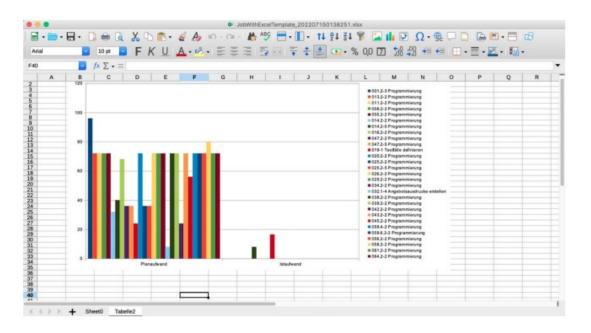
... and then you can preview the report again.



Here you can see the data of the report on the first page...

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005.2-2	Programmierung		72		0		_															
014.2-2	Programmierung		32		0		_										-					
014.2-5	Programmierung		40		8	-																
016.2-2	Programmierung		68		0	_															-	
047.2-2	Programmierung		36		0	-	-	-			-											
047.2-5	Programmierung		36		0	-		-														
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020.2-2	Programmierung		72		0	_																
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... and the diagram created from it on the second page.



10.6 Run Queries in the Background

In the query manager there is now the possibility to execute a query in the background.

in the background. For this, the query must be saved and contain a report. In order to execute the query in the background, you have to click on the coffee cup icon.

🗙 🔩 Search		むな田
	P Image: Selection Customer list Image: Selection I	
C E Query]
Name CustomerList		
Description		
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		×
Lookup Document types Company	Document fields Field values Image: Constraint field set of the	
Report Report	BL_Customer 🗢 🔯	
Format	VIEW	
ShowParameters		
show Figure parameters		
Show query name		
ShowDescription	v	
ShowDescriptionInParameterDialog		
Chart period	▽	

For the result to be additionally stored in the query, the field the field "MaxResults" > 0.

─ Ξ Results		
MaxResults 5	vesults per person Everyone 🗢	

In addition, you can display the results for all users or limit them to one user.

MaxResults			5 Re	sults per person	Everyone	۵	1
Results		•	Owner	Format	Everyone		
	8	1	Schaub Peter	HTML	Per person		

After clicking the coffee cup, the query is executed as a time service in a separate separate thread.

× Info	
Your Query will be performed in background OK	

Therefore, the result will not be displayed immediately and the user will receive an internal email when the query is finished.

Messages	📝 Mail program
∃ New mail: 1	
Finished query Customer list	
	Ballot Messages

In the attachment of this internal e-mail you will find a link to the original query.

X 🔽 Mail 21.:	10.2022 13:28:11 Finished que	ery Customer list					₽☆∃
🔒 🛸 🖓 🔍	INBOX (0/2)	B 🗎 🗙 🖾 🕻	> ≒ →				
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Attachments	🔄 🍥 🔹 Description						
	1 \$APPREG_166635	1735331_BI_Custom	er_20221021012811	-11.html			
	4						

There you will also find the results of the query listed.

MaxResults	5		5 Res	ults per person	Everyone	₹	2
Results		٠.	Owner	Format	Created		
		1	Schaub Peter	HTML	21.10.2022 13:28		
		2	Schaub Peter	HTML	14.10.2022 16:54		
		3	Schaub Peter	HTML	14.10.2022 16:54		

This results list now also updates when you save the query, if you change the maximum number of results, for example.