Projetex 3D Custom Reports Guide

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1 Using Custom Reports

Custom reports are used to extract and view consolidated and summary printable information from Projetex database. Custom reports can be viewed, exported and printed from Projetex Workstation window.
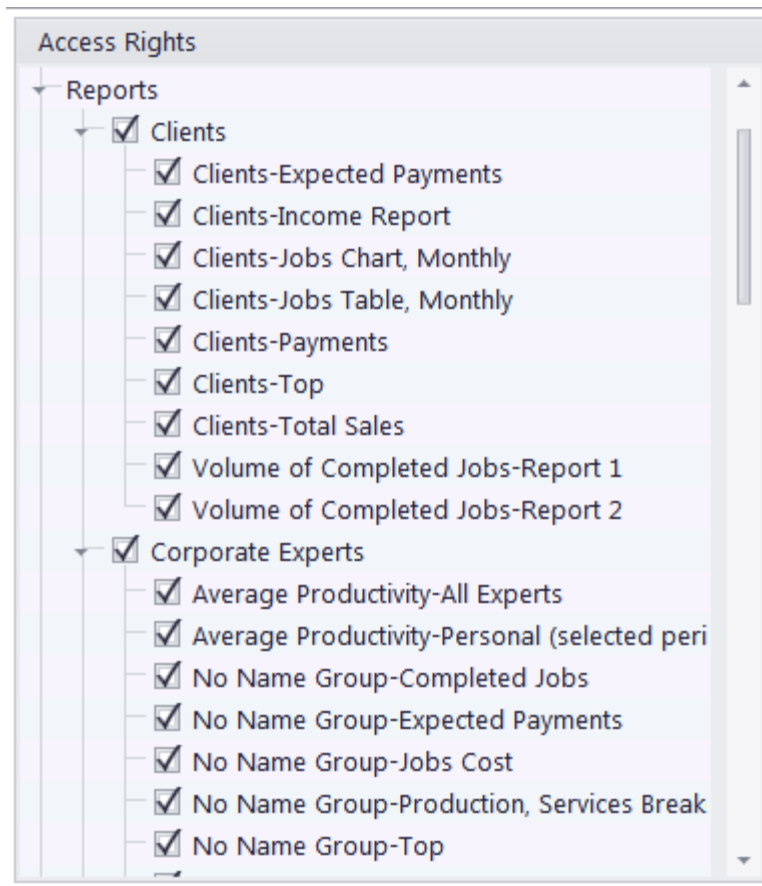
To access custom reports, click on Reports in the Navigation Bar.

Dashboard   Workspace   Calendar   Reports   Knowledgebase

2 Access to custom reports

Access to custom reports can be granted or denied for any Projetex user with the help of Administrator settings.

1. Enter the Backstage View in Projetex Workstation with an Administrator account.
2. Click **Administrator**.
3. Click the **Users and Access** section, select the required user in the list and click the Edit button.
4. In the **Edit User** window select or clear various reports in the Reports section of the Access Rights tree.

Access Rights

- Reports
  - ☑ Clients
    - ☑ Clients-Expected Payments
    - ☑ Clients-Income Report
    - ☑ Clients-Jobs Chart, Monthly
    - ☑ Clients-Jobs Table, Monthly
    - ☑ Clients-Payments
    - ☑ Clients-Top
    - ☑ Clients-Total Sales
    - ☑ Volume of Completed Jobs-Report 1
    - ☑ Volume of Completed Jobs-Report 2
  - ☑ Corporate Experts
    - ☑ Average Productivity-All Experts
    - ☑ Average Productivity-Personal (selected peri
    - ☑ No Name Group-Completed Jobs
    - ☑ No Name Group-Expected Payments
    - ☑ No Name Group-Jobs Cost
    - ☑ No Name Group-Production, Services Break
    - ☑ No Name Group-Top

3   Managing custom reports

Custom Reports settings in Projetex Server Administrator

Custom reports can be created edited and deleted with the help of Projetex Server Administrator.

To create, edit or delete custom reports open **Reports** section of Projetex Server Administrator **Corporate Settings** tab.

1. Run Projetex Server Administrator.

2. Click **Database** tab.

3. Put your database offline by clicking **Go offline** button.

4. Once database is offline, switch to **Corporate Settings** tab.

5. Click **Reports** section to open custom report management options.

Exporting a custom report

To export a custom report, save required report in a PX15 file. This file can later be imported into another Projetex database.

1. Select the required custom report in the list.

2. Click **Save** button.

3. Specify name and location for *PX15* file being saved.

Importing a custom report

You can import a custom report to your database from a *PX15* file.

 Note: Custom reports which are displayed in **Custom Reports** section of Projetex Server Administrator are the ones currently integrated into Projetex database. *PX15* files are used solely for export-import purposes, simply copying new *PX15* file to *\AIT\Projetex 8\Projetex Server\Reports* will not import the new report into database.

To import a custom report, use *PX15* file to load required report.

1. Save *PX15* file being imported to *\AIT\Projetex 8\Projetex Server\Reports* folder.

2. Click **Load** button.

3. Locate *PX15* file being imported, select it and click **Open** button.

Editing a custom report

To make changes to a custom report, select this report in the list and click **Edit** button. This button opens **FastReport** window (report designer interface). FastReport designer is a complex tool intended for IT specialists. It requires some basic *SQL* knowledge. Step-by-step creation of simpler reports is described in *Example: creating a report* topic. Also you can download FastReport manual from our website using the following link: http://version7.projetex.com/images/stories/files/ documents_pdf/CustomReports_ReportEngine_Guide.pdf

For detailed information visit the Fast Report Inc. Internet site: http://www.fast-report.com

4   Creating a Custom Report

This topic will cover the process of creating a simple custom report.

Note: This is a sample of FastReport engine functionality intended for users generally unfamiliar with SQL. For SQL-versed users it is recommended to refer to FastReport manual available for download on http://www.projetex.com/documentation

Creating A Custom Report

1.   Run Projetex Server Administrator, turn the database offline by clicking **Go Offline** button and switch to **Corporate Settings** tab.

2.   Click **Custom Reports** on **Corporate Settings** tab of Projetex Server Administrator.

3.   Click **New** button; enter report name and description in **New Custom Report** window and click **OK**.

4.   Add data which should be used in the report. To do so, on **Report** menu click **Data** in **FastReport Designer** window (it will open automatically, once you click **OK** button).

This will open **Select Project Datasets** dialog window, in which all your custom queries are displayed. Select the required queries by selecting check boxes in front of their names. For this example we selected **Projects (with Model)** query, since we are composing a "Projects report".

Click **OK** button to confirm selection.

Note: You can create your own custom queries with the help of built-in query builder. Any custom queries created this way will appear in this dialog window.

5.   Now, contents of the selected query are displayed in the **Data** field to the right:
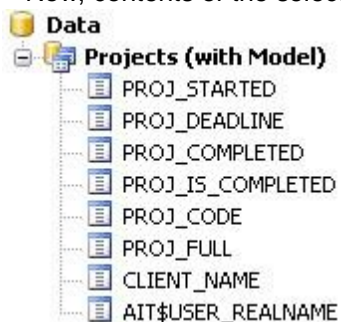
These are the fields from Projetex database, which have been added to the query you selected. In this particular case, the fields are those, containing project names (*PROJ_FULL*) and codes (*PROJ_CODE*), dates of project timeline (*PROJ_STARTED*, *PROJ_DEADLINE* and *PROJ_COMPLETED*), information as to whether project has been completed or not (*PROJ_IS_COMPLETED*) and corresponding client names (*CLIENT_NAME*).
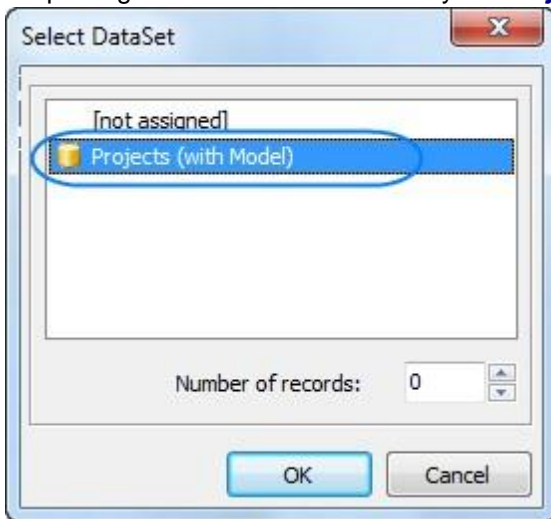
6.   Begin designing your report by placing **Data Bands**.

These "bands" bind report elements together, specifying their location on the page relatively to page itself and to the other bands. More detailed description of the bands can be found in FastReport User Manual. For this particular report you will need to use only few of the bands available.

6.1. Click **Insert Band** button and select **Report Title** band. This will place mentioned band to your report page. Click **Insert Band** button again and select **Header band** to place it.
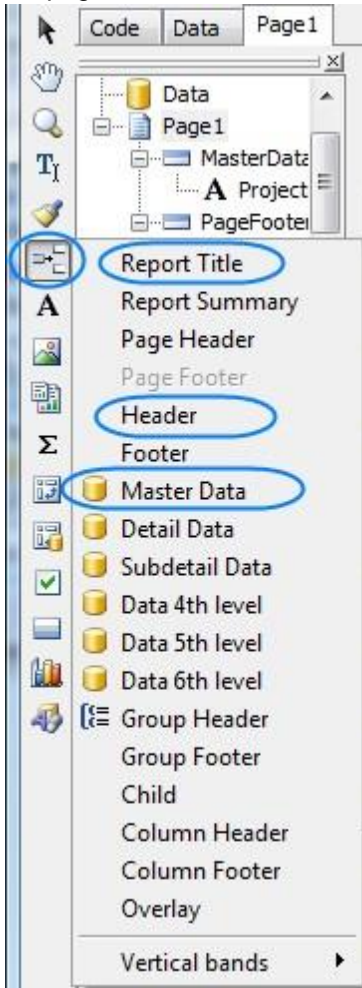
6.2. Click **Insert Band** button one more time and select **Master Data** band to place it in your report. When placing **Master Data** band select your **Projects (with Model)** query when prompted to do so:
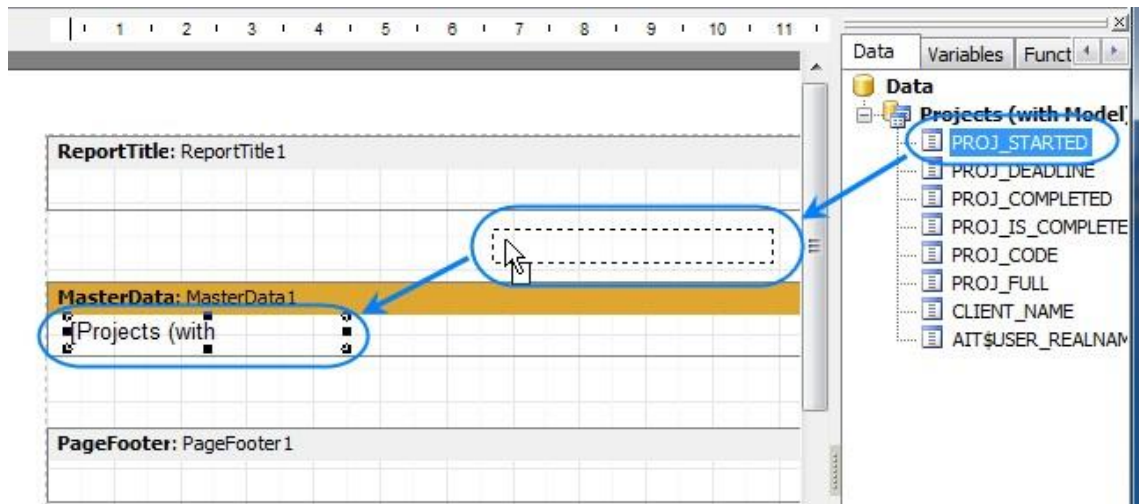
Your report page should look approximately like this:

Example:

7.   Adding data to **Master Data** band.

To add a variable data to your report, you will need to drag-and-drop the required fields from your query to **Master Data** band.

Any **Master Data** band can be linked to certain dataset (or query in this case) only, so in case you have more than one query, be sure to drag and drop fields only to that **Master Data** band, which has been linked to this query.

Example:

For example, the **Master Data** band below can contain fields from *Projects (with Model)* query.

Drag sequentially the following fields from the **Data** area and place them inside **Master Data** band in a row:

Example:

PROJ_FULL, CLIENT_NAME, PROJ_DEADLINE

When placed into your report, the fields take form of text objects, like the example below:

Example:

[Projects (with Model)."PROJ_FULL"]

These text objects act very much like text variables in Projetex RTF templates.

Note: Some of these objects may be very wide. You can adjust their width by dragging the borders of these objects. Alternatively, you can enter exact object length by selecting it and typing their width in **Properties** area:
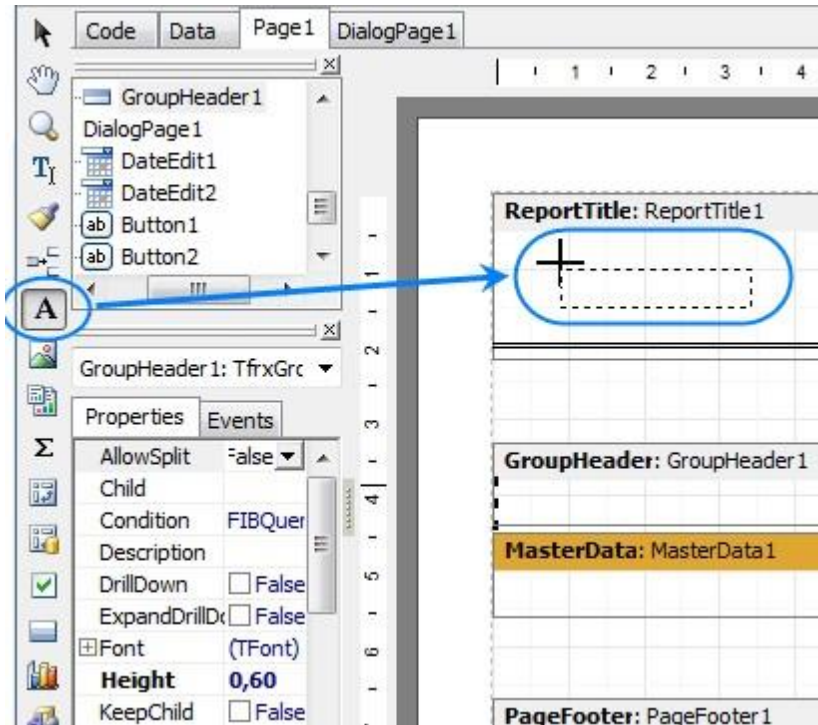
Example:
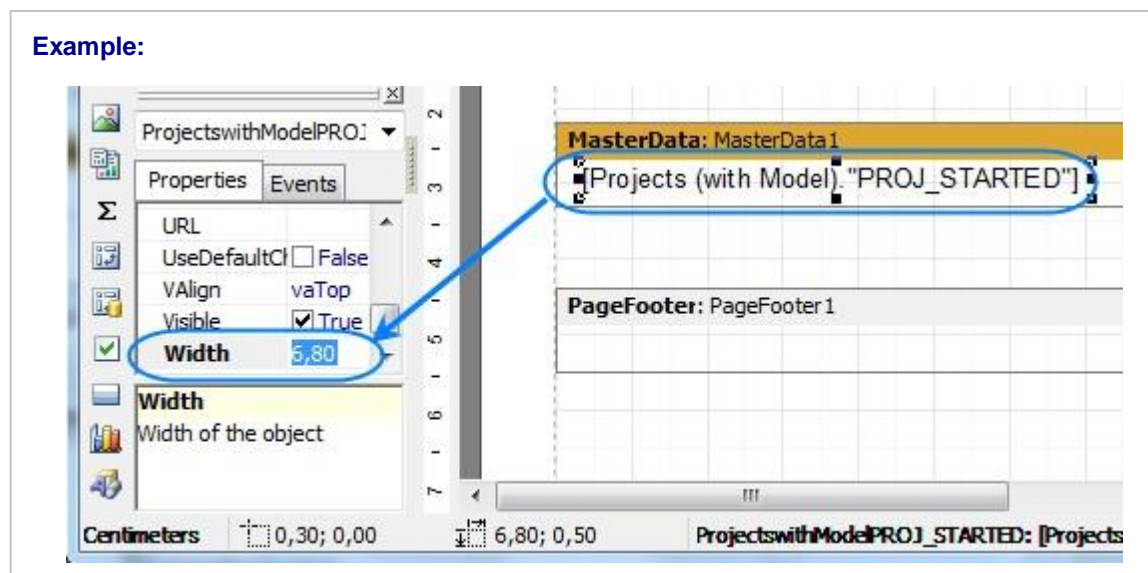
Once all the data has been added, your report should look like this:

Example:
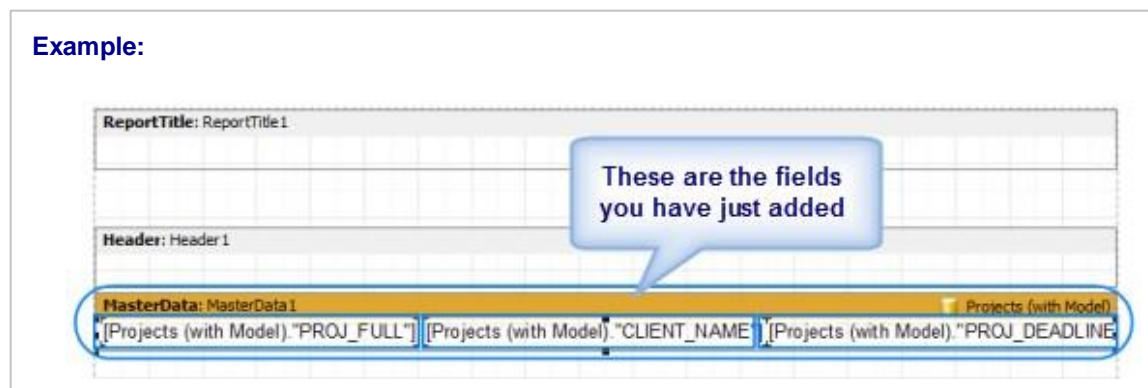
8.   Adding stationary data to other bands.

8.1. Add a header for your report by clicking **Text object** button and placing the object on your report, within the **Report Title** band.


8.2. Type the header for your report in the memo window which appears.

8.3. Data will be displayed in your **Master Data** band in columns (each indicated by a field from the query). Add the names of these columns right above the query field objects in your **Header** band: Project name, Client, and Deadline the same way you added the header text object.

After this your report should look as follows:

Example:
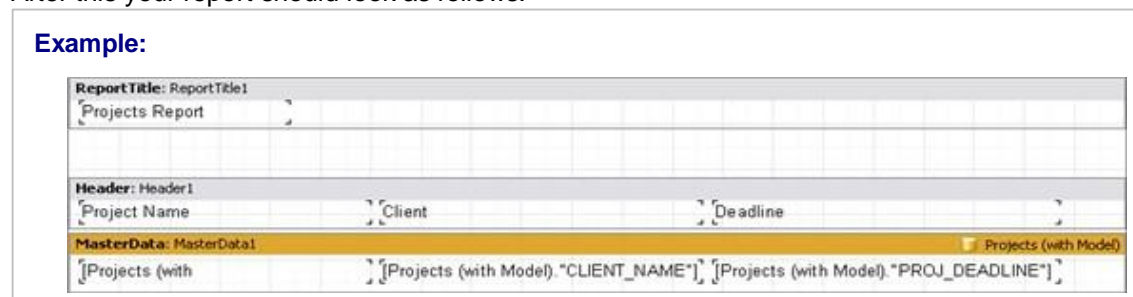
9.   Preview your report by clicking **Preview** button. Your report preview will be displayed in the **Preview** window.

Note: You can further configure style of your report by configuring the style of text objects. Select required text object and adjust its format in the **Properties** area to the left.

10.   Save your newly created report by clicking **Save** button and close report designer.

New report is now ready to be used.

If you want to save this report in a separate file in the **Reports** folder of Projetex (so that you can send it to other Projetex users), select the report in the list and click **Save** button. \

5 Creating a Master-Detail Report

It is often needed to gather information from different database tables. For example, to obtain list of quotes and list of marketing records for each of clients. In this case, list of clients represents "master" data, and lists of quotes and events are called "detail" data (they show details on each of the client).

Objective: Create a report showing lists of quotes and marketing events per each of clients.

1.   Run Projetex Server Administrator, turn the database offline by clicking **Go Offline** button and switch to **Corporate Settings** tab.

2.   Switch to **Custom Reports** section on **Corporate Settings** tab of Projetex Server Administrator.

3.   Click **New** button; enter report name and description in **New Custom Report** window and click **OK**.

In this case none of the pre-designed queries suits this report, thus new queries must be created.

4.   Click **Data** tab to begin adding data to your query,
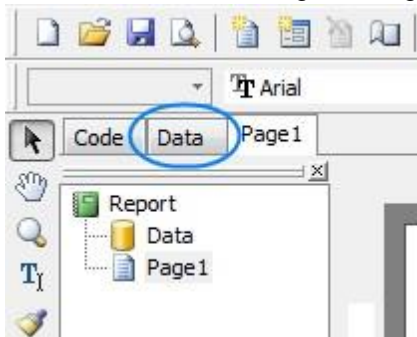
5.   Click **FIB Query** button and place an **FIB Query** object anywhere on the white field.
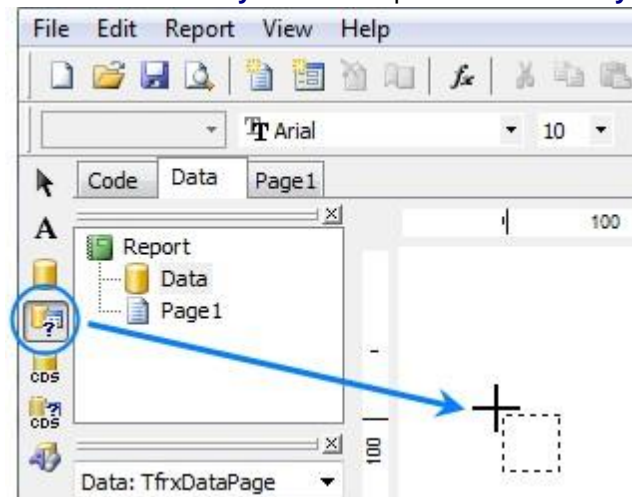
6. Double-click the new object, and enter the code text of the first query:

```
Example:
SELECT

CQUO_NAME,

CQUO_SENT,

CQUO_TOTAL_B

FROM CMULTIQUOTES

WHERE CLIENT_ID = ?MAS_CLIENT_ID
```

This query will extract quote names (`CQUO_NAME`), dates (`CQUO_SENT`), and quote totals in base currency (`CQUO_TOTAL_B`). Line `WHERE CLIENT_ID = ?MAS_CLIENT_ID` arranges the data by master client reference.

7. Repeat step 5 (click **FIB Query** button and place an **FIB Query** object anywhere on the white field) and add the following code to second query:

```
Example:
SELECT

CTRACK_DATE,

CTRACK_INFO

FROM CTRACK

WHERE CLIENT_ID = ?MAS_CLIENT_ID
```

This query will extract dates (`CTRACK_DATE`) and notes (`CTRACK_INFO`) of marketing events (shown on the **Marketing** tab of **Client** window), and will also organize the data by master client reference field.
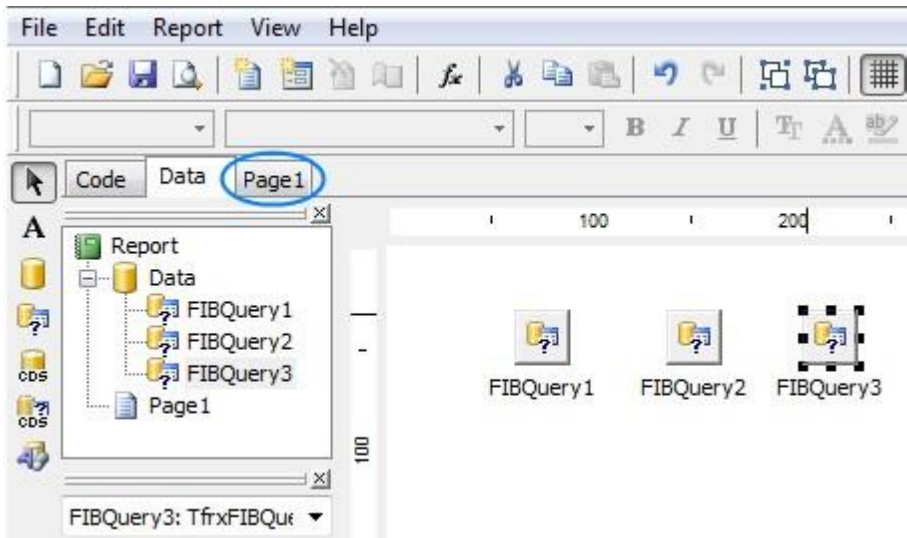
8. Repeat step 5 (click **FIB Query** button and place a **FIB Query** object anywhere on the white field) and add the following code to third query:

```
Example:
SELECT

CLIENT_NAME

FROM CLIENTS
```

This query will extract client names, which are also needed to build this report.

9. Click **Page 1** tab to begin designing the report page.

10. Click **Insert Band** button and add a **Master Data** band. Select **FIBQuery3** as dataset for this band.

11. Click **Insert Band** button and add a **Detail Data** band. Select **FIBQuery2** as dataset for this band.

12. Click **Insert Band** button and add a **Detail Data** band. Select **FIBQuery1** as dataset for this band.

13. Drag necessary fields to the appropriate data bands.

Example:

Dragged the following fields: **CLIENT_NAME** - to the **MasterData1** band, **CTRACK_DATE**, **CTRACK_INFO** - to the **DetailData1**, **CQUO_SENT**,**CQUO_NAME** - to the **DetailData2**.

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14.   Add **Header** and **Footer** bands to separate various fields visually.

Example:

The following bands were placed in this example: **ReportTitle** , 2 **Header** -type bands (**Header1** and **Header2**), **Footer** band and **PageFooter** band. Also labels for header bands have been added.

15.   Now the report can be obtained:

Example:

Fragment of resulting report, showing clients (master data), lists of quotes and marketing records per each of them (detail data).

Alter Ego Solutions
Quotes
20.01.2006   Nulla quam.

Electric Dream Design
 Marketing History
25.05.2009   56n57n
25.05.2009   56n6n56n
Quotes
21.01.2006   Field mis-match (Description)
16.03.2008   AcroLexic Dictionary

Mythology Development Company
 Marketing History
25.05.2009   56n65n
05.05.2009   56n56n
26.04.2009   56n56n56n
Quotes
10.04.2008   Economic History Manual

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