Reporting

Generic Reports

Atollon Generic reports provide users with tool to create view on system data. The benefit of reporting, compared to online views, is that you can include various data fields across the whole system and combine for example:

- projects with messages
- clients with tasks
- activities with time sheet records, etc.
- any simple views on deals, clients, service records, etc.

Flash Animation
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Reporting Features

Report is generated as definition for data querying. Each time the report is run, new query is sent to server, the query is placed into queue and the client side is waiting for the results to appear. On backend, there is copy of all records stored in table and you can run simple queries on the generated results (for example group/sum/count records on any fields).

Access Rights

It is possible to allow / disallow individual users or group of users to create new Report Definition or run the report using existing Report Definition. Users may get results for only records that are visible to users.

In case the report results is stored, report results are accessible to anyone with the access rights to report results!!!

Fields

You can add as many fields into the report you want, you just should understand that not all combinations of fields may generate some results. For instance it is not possible or it has no sense to generate report, which contains events & messaging at the same time. Instead, you should create **one** report **for messaging** and **another for events**.

In order to display the filed in the report result, just tick the (x) in the column "**Show in result**" in Report definition.

Fields are displayed in Tree structure, in order to select appropriate fields, you have to expand any Reporting category, for instance Account (Folder), Contact, Form, Messaging, Project, ... After you expanded the category, you are allowed to select any field that will be displayed in report results.

You can sort order the fields (columns) in report results by pressing button "**Column order**". In the displayed pop-up you may arrange the column order.

Filtering

The report definition may contain already pre-set filters in Report Definition. It is adviced to filter on criteria just to limit the results into the requested set of data, for instance Contact Foler Type = "Client" or Project Type = "Sales Opportunity", etc.

In order to enable / disable filtering based on selected criteria, just tick the (x) in the colum just in front of the field name. It is adviced not to check all fields this way, but just those that you desire to filter.

It is also possible to filter for any field displayed in report results, before you actually run the report generation.

Sorting

It is possible to sort the report results by one selected field. If you want to order report results by more than one field, you should use Grouping feature.

In order to sort the report results by the selected field, select (x) in the Sort column.

Grouping results

In order to group results by the selected criteria, just tick (x) the field under column Group by. You can set order of grouping and re-arrange it using Group By order (see button on top of report definition). You should select at least one aggregate function (**Count** / **Sum** / **Avg**) on any appropriate field that you want to count, sum or make average. Please note that Sum and Avg may be used only in connection with numeric fields.

Reporting Form values

Reporting allows you to include **Form Values** in report results. The only tricky part is that you need to define which **Form** is used for which reporting use. For instance, you used form "Client Form" as form set-up at Folder Type "Client". This way you should right-click on the form (displayed at left side of the Report Definition window) and select that it is "Subject Global Form".

Once you added the form into Report Definition, new fields (defined on form) should be added into the list of available fields. You are now able to filter on form fields, use them in report results, etc.

Report Results Features

Access Rights

Each user will receive only those results that are enabled to the user. Therefore report results may differ based on who runs the predefined report.

Working with report results

You are allowed to work with data in report results. Once there is Contact Folder, Project, Activity/Milestone, Message, Task or Event displayed, you should be able to open it's detail. There are several actions working on multiple records selection.

Exporting report results

You are allowed to export report results into CSV (Web client) or XLS (Win client) or print them (Win client).

Saving report results

If you want to keep the generated report results, you are allowed to store them (using Windows client only).

Known Issues

Web client provides view on designed reports, but does not support 100% of all of them. You need to test the report results before you put the report into production. For instance some criteria can not be grouped under Web client interface yet. We are working on resolving these issues.

- You can not filter on fields that are not displayed in report results.
- You should not use Sum / Avg aggregate functions on non-numeric fields.
- You should not combine fields in the same report result, which should not be combined.
- You should not filter on criteria, based on which you group at the same time.

Example

Combine reporting of Contact Folders, in connection with communication, tasks or time sheet.

Create New Report

In order to create the report properly, some basic understanding of system data structure is required. You can create new report using MS Windows Administration interface.

Go to tab **Reports** > **Report selection** and press **New report**.

Report Results Mass Actions

On report results, you can run several mass-account or mass-project actions. Just select records using either Ctrl+A or Ctrl + click or Ctril + click 1st & click last record. Right-click with mouse - wait & select one of the options. Please note that these functions sometimes require to have Folder Type or Project Type column in the report results. The process of displaying the pop-up menu may be very slow on larger record sets.

Change Multiple Responsible Users

Generic Report Scenarios

Below mentioned examples / scenarios present only the most common reporting usage.

Show Clients Overview

In new report, select at least reporting criteria **Account** and field **Name**. Press (x) in Show in results column at this criteria.

Because system may contain several Folder Types (including Client, Partner, Simple Folders, etc.), you should filter for criteria **Account** > **Type**. Double click into "**Filter value**" column in the same row and select the "Clients" Folder Type (or any appropriate).

Additional to these two required fields, you may add another criteria, for instance:

Field Name	Description
Created from/to	Date the Client was created
Custom ID	Client reference number
Type	Folder Type
Status	Fixed status values (Initial, Active, Closed)
Custom Status	Any user-based status (Potential, Hot, VIP, Current, Lost, ...)
Path	Once the report is used for reporting folders, you can display the whole path to the folder. It may also be used once the client is created in multi-level organization structure, including branches of larger organizations.
Parent folder	Once the folder is stored within another folder in tree structure, it may contain the Parent folder
First contact date	The date of first communication with Client
Last contact date	The date of last communication with Client
Contact > Person > *	Is the Client person? If yes, you may use this category.
Contact > Company > *	Is the Client company? If yes, you may use this category.
Contact > Primary contacts > *	In any case you can use this category and show primary contact data, incl. primary e-mail, phone, mobile, address, etc.

Contact > Contact address > *	Show any address associated with the Client. In case there are more addresses, the report will generate more rows in report results.
Contact > Contact information > *	Show any Client's contact information (e-mail, phone, etc.). If there are more contacts found (several mail addresses), the report results will display new row for each of the contacts.
Contact > Bank > *	Show Client's bank account.
Contact > Valid from, Valid to, Keyword, Comment, Distribution group, Source database, Reference	Show additional Client contact details.
Subject Global Form > *	Once you assign the Form based on Folder Type = Client here, you will be able to include the Client's form values in the report results.
Form > *	Once you assign the Form based on Folder Template = Client here, you will be able to include the Client's form values in the report results.
Responsible team / user > *	Include these fields if you want to show Key Account for the Client. In case there are more responsible users for the same Client, the report results will show new row for each User and Client. In order to avoid this, you may filter only for Primary User.
Account state history > *	This is special reporting option allowing you to display history of Client status changes & user responsibility assignments.

By including any of the above fields, you may generate simple Clients overview reports.

Projects Reporting

We discussed basic project reporting in one of the last chapters of Core Set-up. One of the core reports is Project Status Overview report, which will indicate number of projects in particular Custom Status as well as primary responsible person for the project.

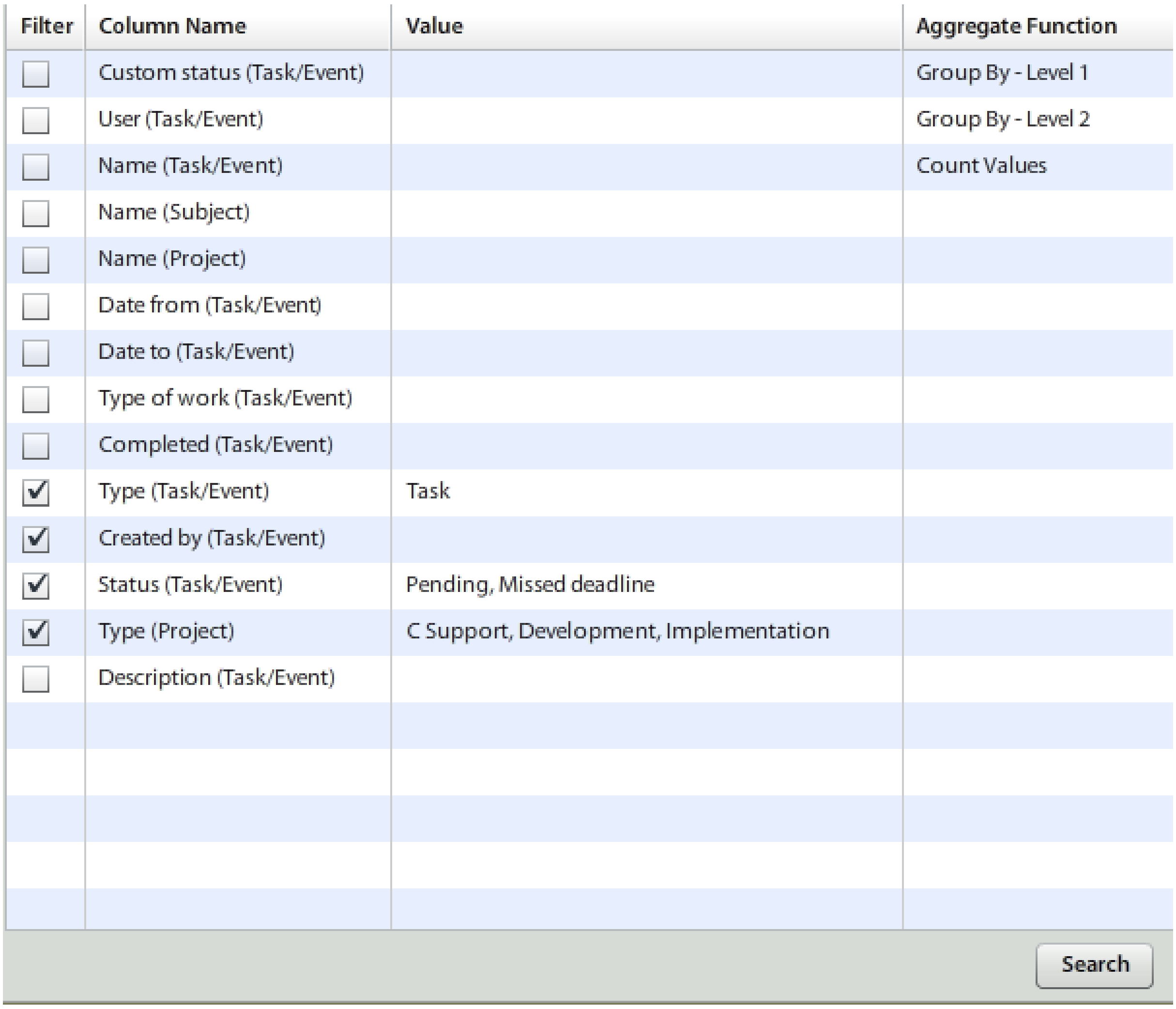
Tasks Status Reporting

You can create reports that will indicate number of pending tasks or tasks waiting for your client's input easily. Please configure the following report, if it's not yet available in your Atollon:

Field Name	Filtering	Grouping Criteria	Description
Task/Event.Custom Status		Group by	Group By criteria
Task/Event.User		Group by	Task Solver

Field Name	Filtering	Grouping Criteria	Description
Task/Event.Name		Count	Task Title (add Count criteria)
Folder.Name			Indicates a **Folder Name** (for example Client Name).
Project.Name			Indicates the **Project Name**, on which the Task is assigned.
Project.Type	Select types of projects that you want to watch. These should preferable include your Job, Case or Project and not your Sales Opportunity, which belongs to sales performance overview.		Your Project Type, belonging to production process.
Task/Event.Type			You can switch whether you want to report from Events or Tasks (in this case we need Tasks).
Task/Event.Date from			Date Task starts
Task/Event.Date to			Task Deadline
Task/Event.Type of work		(optionally Group by)	Type of work
Task/Event.Completed			Date Task was completed
Task/Event.Description			Task Description
Task/Event.Created by			Task Created Date
Task/Event.Status	Pending, Missed Deadline		

The resulting report set-up should look like:



Filter	Column Name	Value	Aggregate Function
☐	Custom status (Task/Event)		Group By - Level 1
☐	User (Task/Event)		Group By - Level 2
☐	Name (Task/Event)		Count Values
☐	Name (Subject)		
☐	Name (Project)		
☐	Date from (Task/Event)		
☐	Date to (Task/Event)		
☐	Type of work (Task/Event)		
☐	Completed (Task/Event)		
☑	Type (Task/Event)	Task	
☑	Created by (Task/Event)		
☑	Status (Task/Event)	Pending, Missed deadline	
☑	Type (Project)	C Support, Development, Implementation	
☐	Description (Task/Event)		

Search

Activity Reporting using Messages

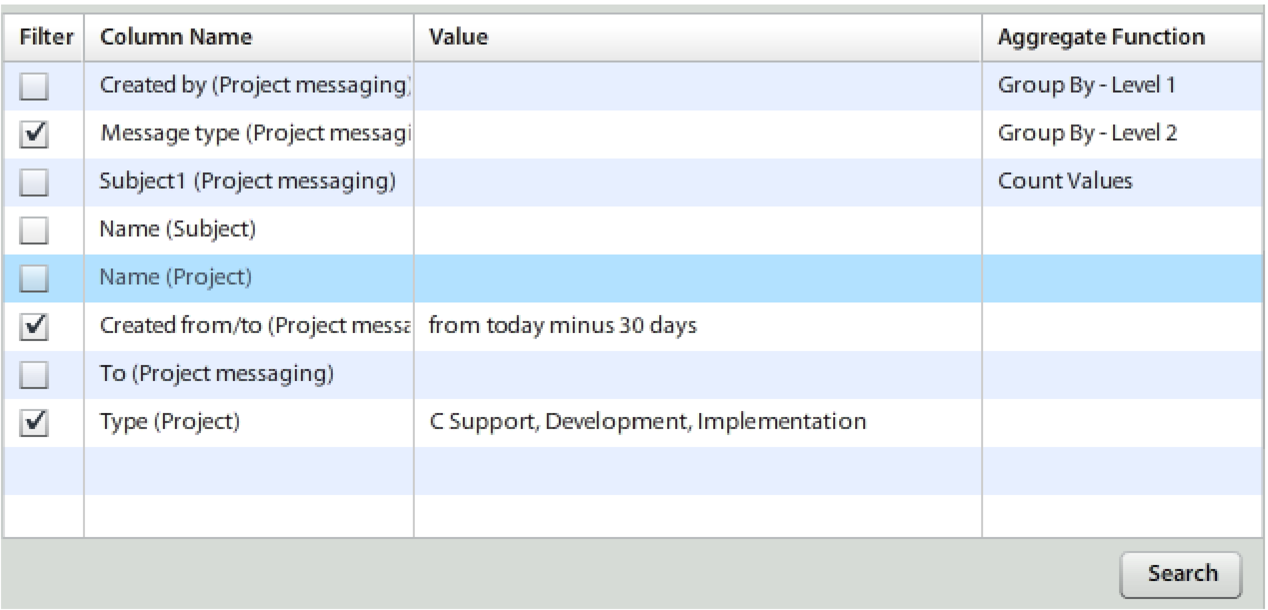
You can set-up report, which will show you communication frequency of your team workers. Again, you can focus only on communication connected with execution projects. Always when interpreting your report results, you should consider factors that influence the results. Of course, it would be strange if your main executive force is the most communicating and on the other side your projects coordinator has only few notes.

Field Name	Filtering	Grouping	Description
Project Messaging.Created by		Group by	Who created the message
Project Messaging.Message Type		Group by	What type of message was created
Project Messaging.Subject		Count	What was written
Folder.Name			Name of the Client / Folder
Project.Name			Name of the Project
Project Messaging.Created from/to	Last 30 days		

Field Name	Filtering	Grouping	Description
Project Messaging.To			Whom the message was sent (in XML format)
Project.Type	Any execution type projects		You want to get only your production type of communication.

This project will give you nice overview of how you care about your existing projects / clients. Once you communicate frequently, it may increase the security of your client and improve your relations with them.

The resulting report set-up will look like:



Filter	Column Name	Value	Aggregate Function
☐	Created by (Project messaging)		Group By - Level 1
☑	Message type (Project messagi		Group By - Level 2
☐	Subject1 (Project messaging)		Count Values
☐	Name (Subject)		
☐	Name (Project)		
☑	Created from/to (Project messa	from today minus 30 days	
☐	To (Project messaging)		
☑	Type (Project)	C Support, Development, Implementation	

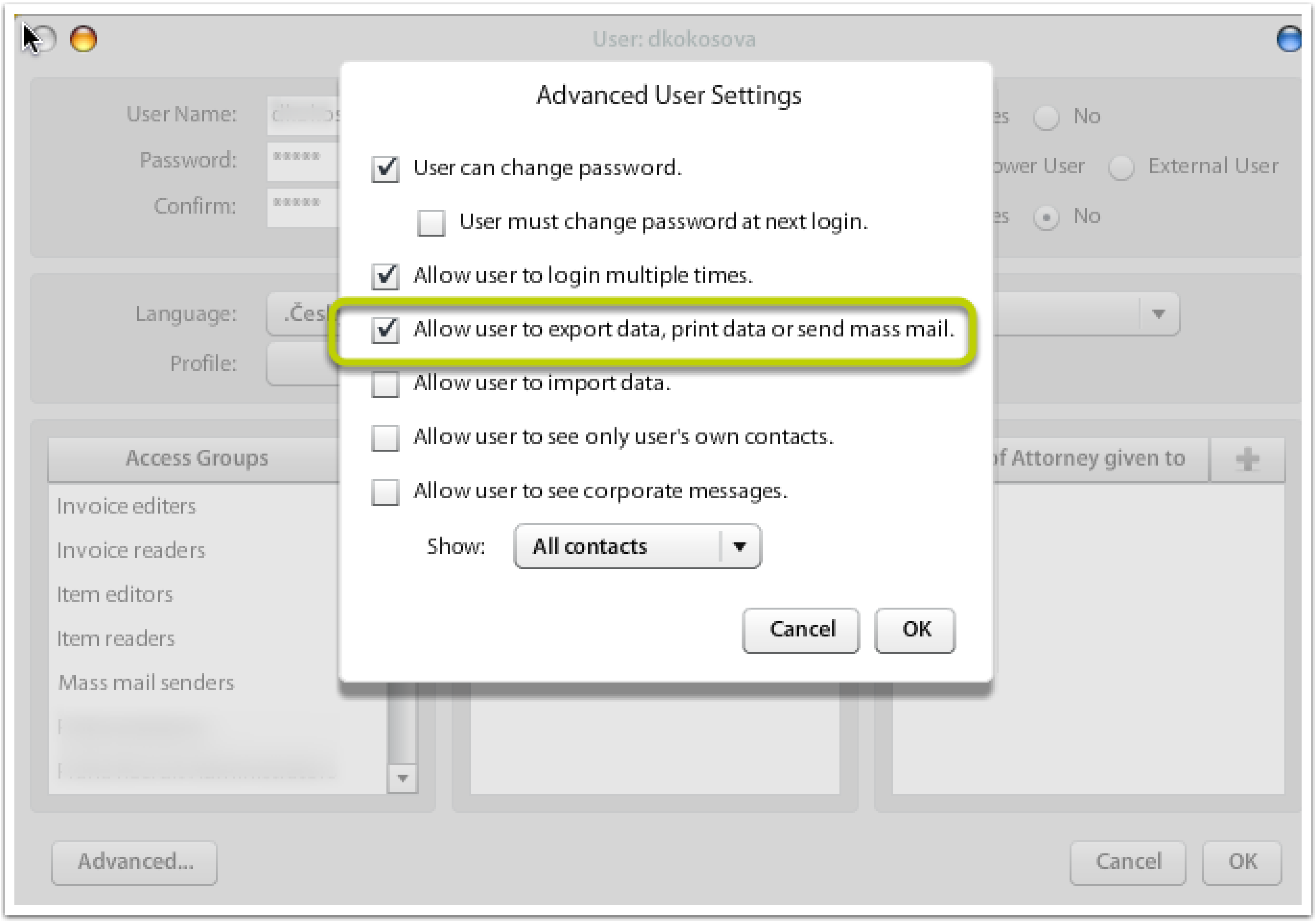
Please feel free to design your own reports that will help you measure your production effectiveness. Using strong base that you get in Atollon, when properly used, you can manage your company based on numbers, as an supportive tool for your management decisions.

Working with Generic Reports

Export / Print Functions

Enable / disable export / print function

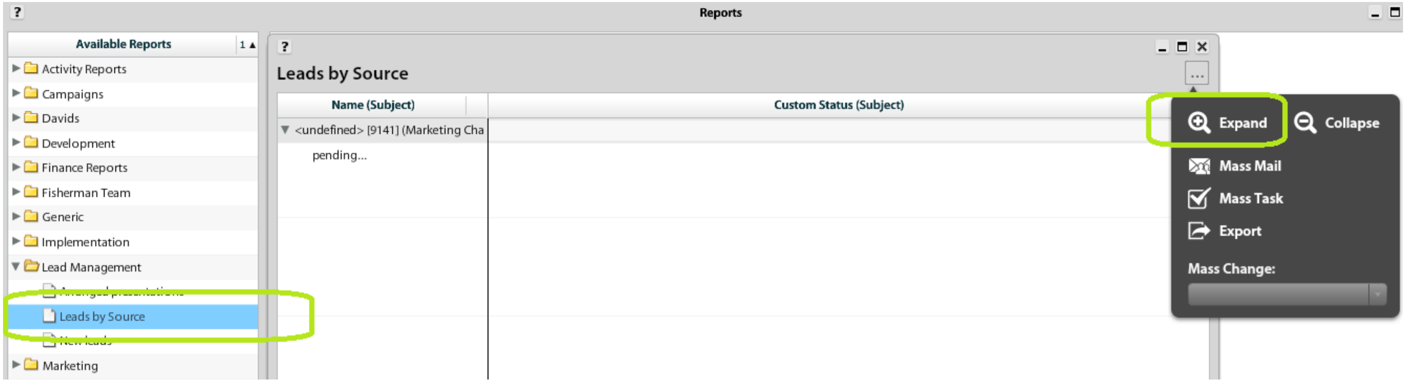
It is possible to disable export / print functions from Reporting. You can change these options in User Settings (Options & Tools > Users). In advanced options, check / uncheck the option to Export / print.



Export / Mass changes on Clients

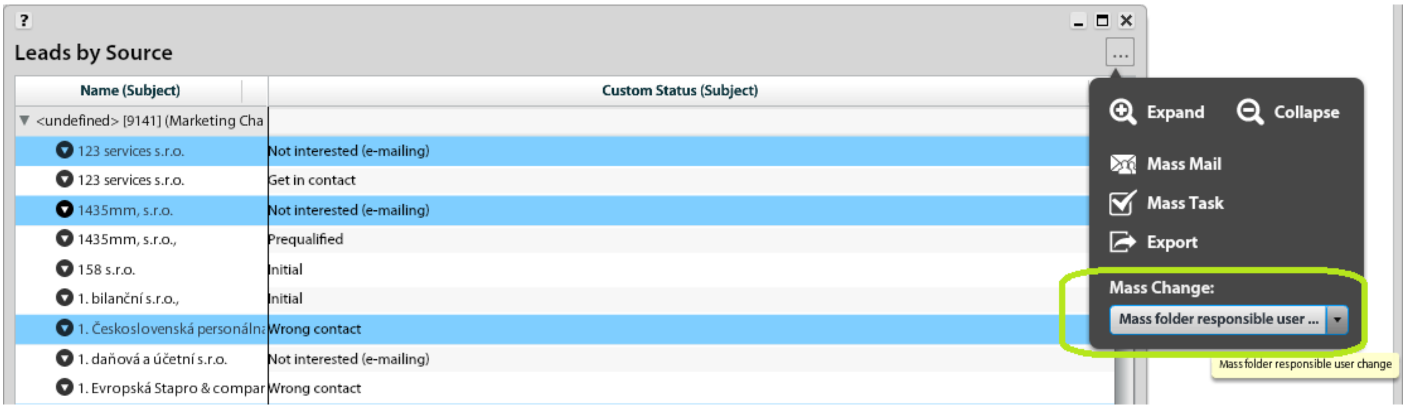
Mass folder responsible user change / Mass function

The mas changes are being done in section Report, where you will choose in tree structure Leads ***Management / Leads by Source***. By double click, you will open the window, with your all clients.



*) if you have only one-row use function Expand

Then choose by highlight two or more clients, where you need to make a change. For change use function Mass folder responsible user change.



In a new open window, you can choose User (user to replace) and Replace with (new responsible user).

Setup Weekly Reporting

Introduction

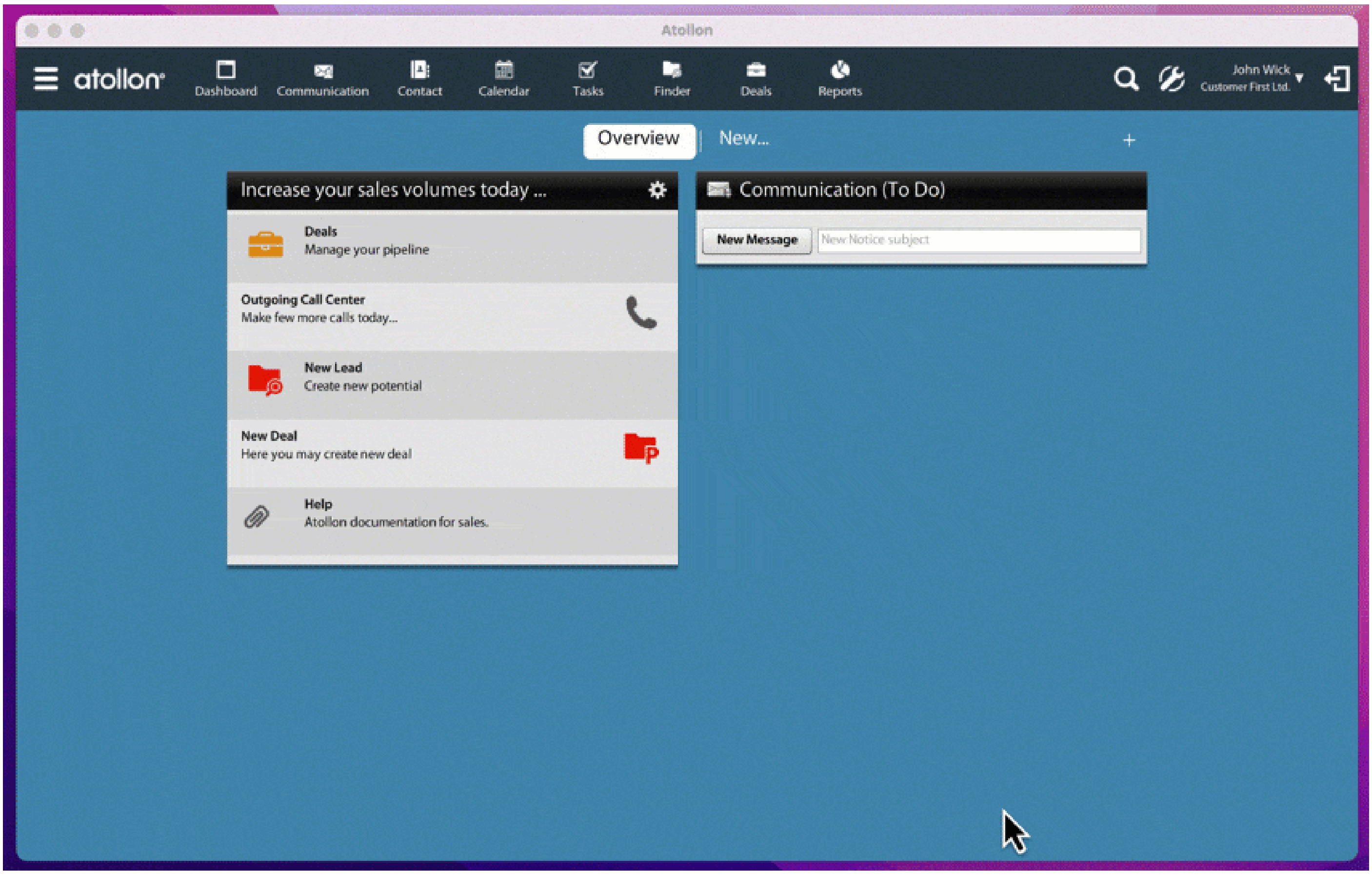
Weekly reports are **Report packs** (set of generic reports) sent to **Contact group** of users in predefined frequency. The frequency is defined using **Timer service** that runs workflow plugin **Report generator** configured to your needs.

Tools used

Tool	Explanation
Report pack	Tool (Applications > Report packs) that allows you to generate more reports at once.
Generic report	View on your data in ATOLLON, configurable to your needs, may consist view on deals, leads, clients, service activities, technology tracked, calendar events, tasks, time sheet, etc.
Contact group	Functionality of contacts module that allows you to group similar contacts together. For the purpose of automated report generation, only system users may be addressed.
Timer service	Tool for running regular system tasks, ie run **Workflows**.
Workflow	Definition of conditions, under which **Workflow Activities** can be executed.
Workflow activity	Any action that can be run using **Workflow**.
Workflow plugin	Any tool that can be executed and configured using **Workflow Activity**.
Report generator	Custom workflow plugin that configures what report or report pack is sent to which contact group of users.

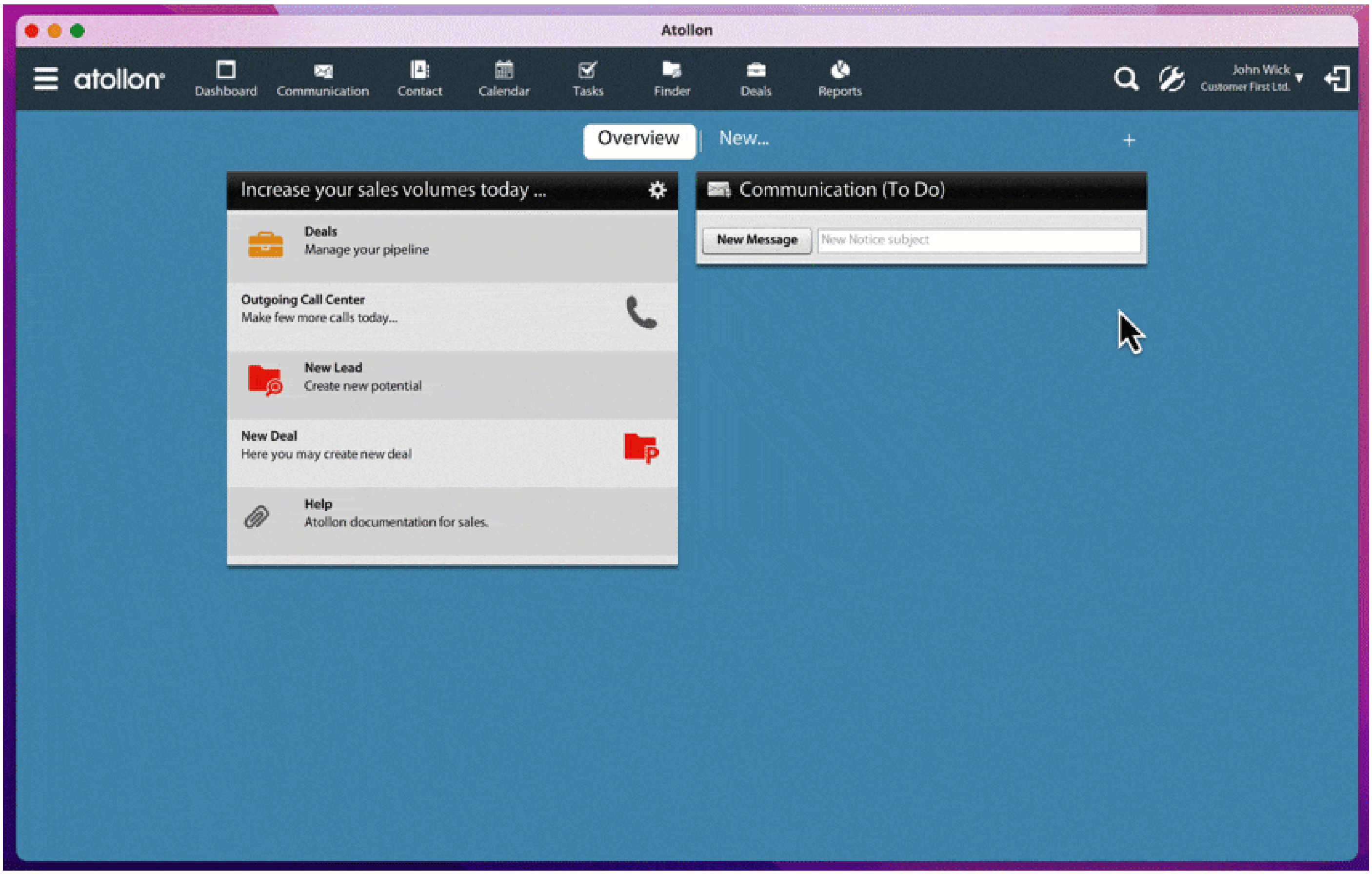
Create or update Weekly Report Pack

Report pack allows you to select set of reports to be generated in one run. The report pack can be sent using workflow automation and timer services on regular level to selected recipients.



Create new weekly report

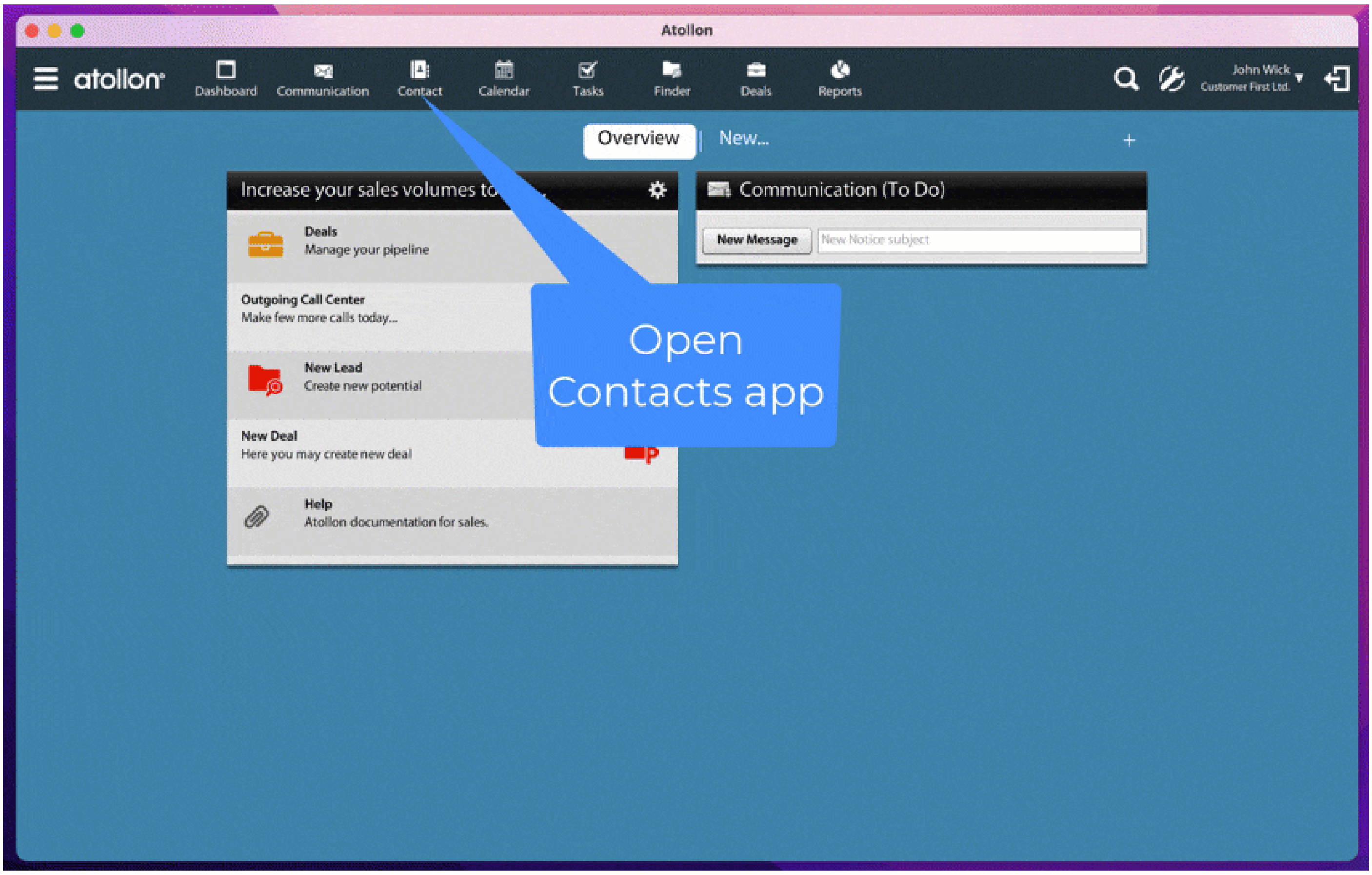
If you want to add another report to weekly report pack, you can copy any existing report and just add weekly filter criteria, or you can create brand new report. Below you can find example on how to copy & modify one of existing reports.



After you have created new report, you can go back to Report pack (see video above) and add the report to the weekly report pack.

Add weekly report recipients

Weekly report recipients are system users added to one of groups in User engagement group category, see video below on how to add user to the contact group that receives the report.



Timer service setup

Below you can find the way to setup timer service that runs the workflow plugin **Report generator** exection.

Note: The current setup is not yet user friendly, it requires getting report pack ID and contact group ID from Logger app. More advanced user level in software is required.

https://www.youtube.com/embed/MPDLVWSiOX0