

Type: User Documentation 18-Jan-2024 | Domantas Vidutis

This application is used to setup Reporting solution. To access the setup application, you must have a Status Reports (Administrators) Role (Role Code: StatusReportAdmin) in the current Domain. This application is the starting point to configure your Status Reporting solution. When new domain is created and Setup: Status Reporting app is opened, initial configuration settings are initiated. It is required to go through these settings and either manually adjust them or use "Copy From..." functionality to copy required settings and values from another domain.

There are Domain/Project specific settings and Global Settings. To be able to change Global Settings, user needs to switch to GlobalTemplate domain and should be a member of a Global Administrator Role.

- **Note for Implementers / Developers**
- To initiate initial "GlobalTemplate" domain settings on a new or upgraded solution run [astp_Reporting_InitiateSolution] stored procedure

Report Settings

Report settings allows customizing a report type. When 'Frequency' is set, the a report will be created automatically at set interval.

[Report Settings](#) [Workflow Permissions](#) [Notifications](#) [Report Status](#) [Report Templates](#) [Report Types](#)

- Multiple Report Types can be configured per Domain. Report Types list is managed in 'Report Type' tab by switching to GlobalTemplate domain.
- Set 'Frequency' field to automatically create new report at selected option.
- Note: Only newest report with selected Report Type will be created at selected 'Frequency'.

Report Type	Frequency	
🔍	🔍	🔍
▶ Daily Report		🗑
Monthly Report	Month Last Day	
Quarterly Report	Quarterly: End of Quarter	
Weekly Report	Weekly: Sunday	
★		

General

General settings tab is used to setup default status report settings for every report type available.

- **Use Status Reporting Workflow** - enables the creation of workflow.

- **Copy Content** - enables an option that lets copying contents from previous report to the new one.
- **Use Import Sections** - enables to import sections from other status reports.
- **Use Report Approver** - adds an additional role to report that is responsible for approving a report before publishing.
- **Use Distribution** - enables the option to create a distribution list to send the report to when it's done.
- **Use Notification** - automatically sends mail notification to section responsible users when a new version of a report is generated.
- **Use Arena** - saves the report to the Arena.

General

Text Editor

Edit

☐ Use Status Reporting Workflow

When Use In Workflow is checked, Workflow creation option will be available from Status Report Details page

☐ Copy Content

When Copy Content is checked, copy content and attachments from previous sections to new report.

☐ Use Import Sections

When Copy Content is checked

☐ Use Report Approver

When Use Report Approver is checked, you can choose someone with the responsibility to approve the report before publishing it

☐ Use Distribution

When Use Distributution is checked, you have the option to create a distribution list to send the report to when its done

☐ Use Notification

When Use Notification is checked, you will automatically send mail notification to section responsible users when a new version of a report is generated

☐ Use Arena

When Use Arena is checked, the report will be published to Arena with a link to the report

Text Editor

Text editor allows customizing report font and font size.

Default Font is Times New Roman, default font size is 12pt. Enabling Allow All Fonts and Allow All Font Sizes overrides default settings. Section Word Limit sets character limit for all sections in report. Section Word Limit can be changed for individual section by an administrator.

General

Text Editor

By default 'Default Font' is set to 'Times New Roman' and 'Default Font Size' is set to '12pt'

Section responsible can only use 'Default Font' and 'Default Font Size', unless 'Allow All Fonts' and 'Allow All Font Sizes' is checked

Default Font	Default Font Size	Allow All Fonts	Allow All Font Sizes	Section Word Limit
<div> <div></div> <div>Times New Roman</div> </div>	<div> <div></div> <div>12pt</div> </div>	<div> <div></div> <div></div> </div>	<div> <div></div> <div></div> </div>	

Workflow permissions

Workflow permissions allows to give permissions to persons if Status Reporting workflow is enabled for specific report type.

To use status report in workflow, check 'Use in Workflow' option in Report Settings tab. When workflow is enabled for Report type, workflow roles will be generated. Navigate through Roles grid to assign persons for dedicated Status Reporting workflow role.

Notifications

Notifications allows creation of templates that are used when sending notifications. Tags are used for inserting fields which will be processed when sending notifications.

Copy from...

Report Settings Workflow Permissions **Notifications** Report Status Report Templates Report Types

- Tags are surrounded with '<% %>' in order to be swapped with a specific value
- To set up a link to a 'report' or 'section' manually, click '🔗' icon on text editor toolbar
- Paste one of the link tags into 'URL' field and add desired text into 'Text to display' field

Template Notify Responsible **Template Notify All Responsible** Template Notify Approver

Tags available:

ReportTitle

DomainName

ReportResponsible

ResponsibleName

Report_ID

ReportType

SectionName

Cut-Off

DueDate

DaysUntilDueDate

ReportLink

SectionLink

Save Cancel

Notification subject

A report needs your attention

Notification body

↶ ↷

Arial

10pt

Paragraph

B U *I*

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🔗 📧

Dear <%ResponsibleName%>

You have been set up as text contributor to this Pims report: <%ReportTitle%> - <%Report_ID%>

Report Link: <%Report_ID%>

Section Link: <%SectionName%>

Report Status



Report status is used to identify in which state the report is currently. These statuses can be renamed to what is needed and added multiple times, except for Initiate and Complete system statuses which are unique.

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This status can only be changed in Status Reports Detail application by an administrator. This status also changes to a "Completed" system status when report is published and to "Verified" or "Approved" system status when a report is unpublished depending whether Use Report Approver setting is turned on for that type of report.

[Report Settings](#) [Workflow Permissions](#) [Notifications](#) [Report Status](#) [Report Templates](#) [Report Types](#)

- Status is used to identify the Reports for filtering and tracking of their progress.

...	Status	Description	System Status	
	🔍	🔍	🔍 	
▶	In Progress		In Progress	
	Initiated		Initiated	
	Finished		Completed	
	Approved Yes		Approved	
	Verified		Verified	
	Approved		Approved	
★				

Report Templates

Allow uploading global templates that can be chosen when creating a new status report. The template can be uploaded by clicking the 'Click here / Drop files here' button in the new row of the templates grid or by dragging and dropping the template onto the grid.

Report Types

Report types show all available reports to be configured. New Report types can only be dome from Global Template Domain.

- 'Report Type' is required in order to configure settings for the Report Type per Domain

- The content can be updated only in Global Template Domain

...	Report Type	
	Q	
▶	Monthly Report	🗑
	Weekly Report	
	Quarterly Report	
	Daily Report	