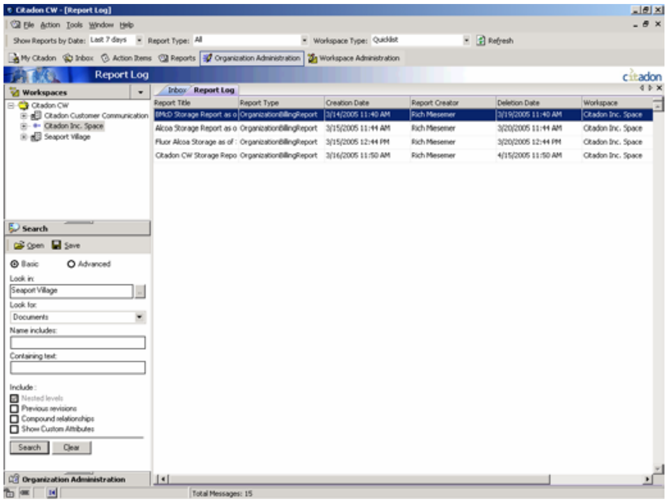
Running Standard Reports
Quick Reference Guide

CW provides a variety of standard reports that can be configured and run based on a user's permission set. Output can be viewed, stored, and/or downloaded for distribution. See *QRG – Viewing Reports* for information on how to view previously run reports.

The Report Log

✍ Users must have previously been granted access to reports in order to launch them. Users can only view and launch reports on objects to which they have access.

Select Reports from the secondary menu



The Report Log contains all the previously run reports that a user has permission to view. All columns can be sorted and moved via click-and-drag.

The following functions provided in the toolbar and menu allow you to run new reports and perform functions on the saved reports in your Report Log.

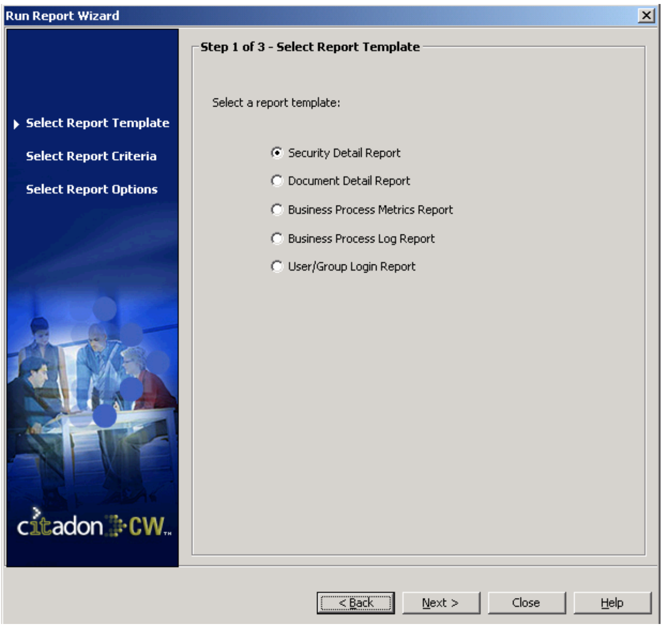
Run Report	Click to open **the Run Report Wizard**, which enables you to run new reports.
Open	Click to view a selected report.
Delete	Click to permanently delete the selected report from your log and anyone else's log that has access to the report.
Hide	Click to hide the selected report from your report log, without affecting the availability for other users. (Note: You can still access reports that you've hidden using the Hidden Reports filter described above)
Security...	Click to open the **Security Settings** dialog box, which enables you to view and set the security permissions for a selected report.
?	Click to open CW Help for the Report Log

Running a Standard Report

Running a report with the Report Wizard consists of three steps:

- Selecting the Report Template – which report?
- Selecting the Report Criteria – what do you want in it?
- Selecting the Report Options – what do you want to do with it?

Step 1: Click Run Report on the menu bar to launch the **Report Wizard**.

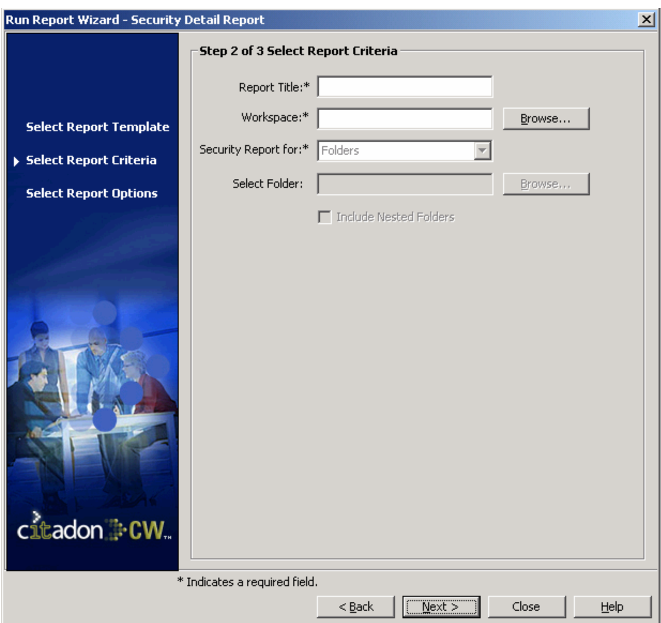


There are five standard report templates, summarized below:

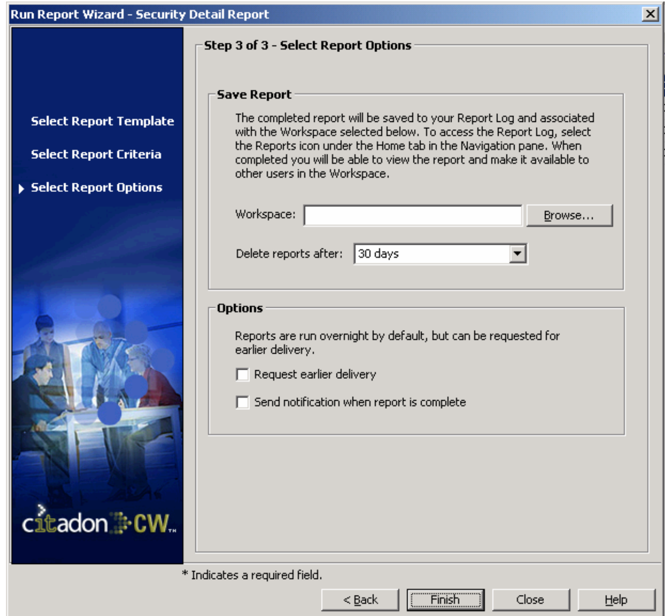
Report Type	Function

Security Details	• Lists who has what security access to the following workspace items: folders, documents, binders, and BP setups.
Document Details	• Lists all the folder contents of one or more workspaces. • Displays the owner, revision, lock and upload status of each item in a folder.
BP Metrics	• Lists one BP template's statistics in one workspace. • Summarizes a BP template's completion time, node by node, with respect to due date.
BP Logs	• Detail report of all BP instances of multiple workspaces or BP template types, through the following parameters: dates, status, overdue, overall statistics.
User/Group Login	• Lists group and/or user membership of one or more organizations. • Summarizes which users are in which groups. • Provides details as to when users/groups logged in.

- Select the desired report template and click Next >.

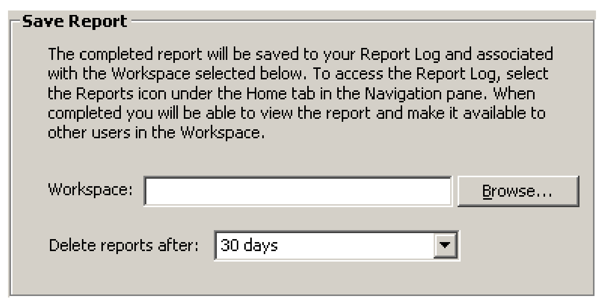


Step 2: Select the report criteria. In the example above a Security Detail Report has been selected. The specific criteria selected will be different for each report. Refer to the sections below for the specific criteria for each report type.

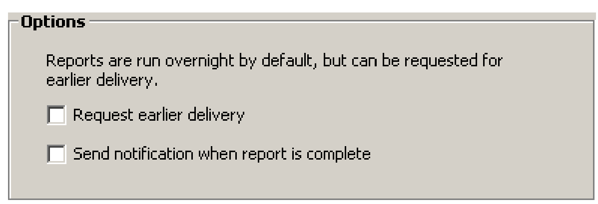


Step 3: Set the report options

- All reports are saved to your Report Log and associated with a Workspace for filtering and security purposes. To save this report, click Browse... and select the workspace to which you want to save the report. Once the report is saved, you'll be able to allow access to other users in that workspace by mofiying the security.



Note: The report can be saved to a different workspace than it was run against.



- Options
  - Check **Request earlier delivery** if you want the report run immediately. Otherwise it will be run overnight.
  - Check **Send notification when report is complete** to be notified when the report has finished

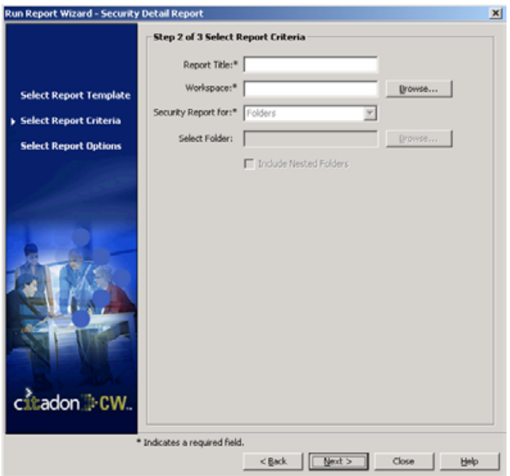
Note: The notification will be sent to your Citadon CW Inbox. It will be copied to your external email based on the Notification Preferences set for Administration type notifications. Select Tools>User Preferences… to verify your notification preferences.

- When the Report Options have been set, then click Finish to run the report.

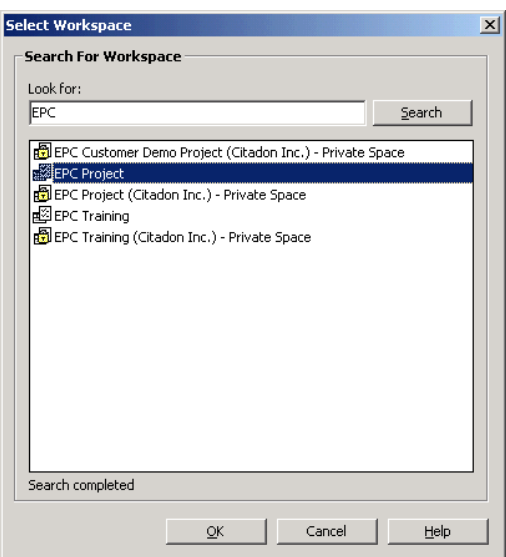
Setting Report Criteria

Step 2 in running any report is setting the report criteria. Below are the steps for setting the criteria for the Standard Reports in CW.

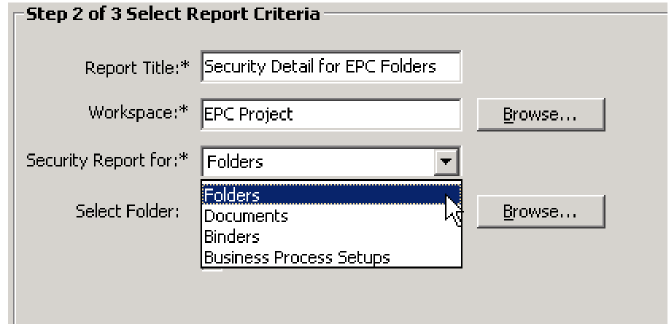
Security Details Report



1. Enter a title for the report (required). The title should be descriptive enough to stand apart from the other reports in the log.
2. Click Browse... to select the desired workspace.

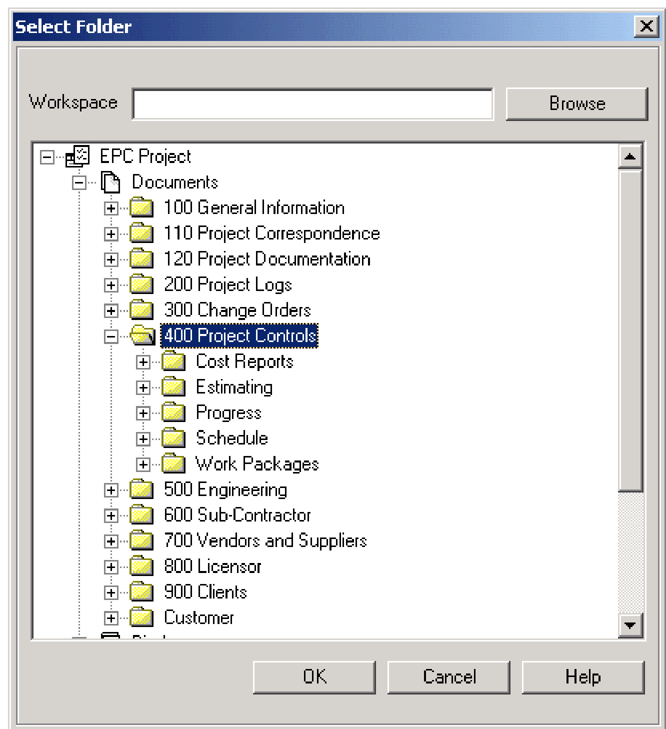


3. In the Select Workspace dialog, enter a portion of the workspace name in the Look For: field and then click Search.
4. Select the desired workspace from the list and click OK to select the workspace.

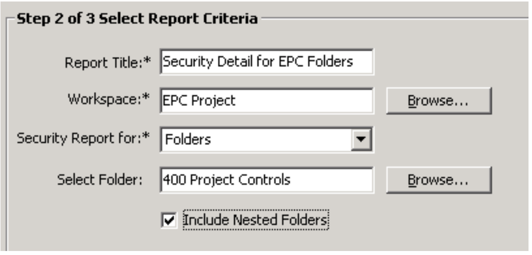


5. From the Security Report for: dropdown list, select the object type to be reported on (Folders, Documents, Binders, or Business Process Setups).
6. If **Folders, Documents,** or **Binders** are selected, then click Browse... to select the folder for the report to run against.

   Note: If **Business Process Setups** is selected, Select Folder is grayed out



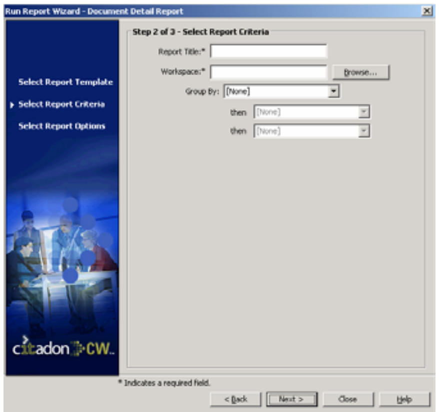
7. Select the folder that the report is to run against and click OK.



8. Check the Include Nested Folders box to report against all the folders in the selected tree. Then click Next >.

Note: To run the report against the entire Workspace, leave the Select Folders field blank.

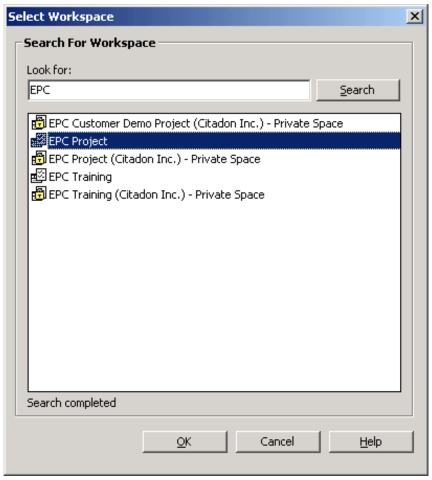
Document Details Report



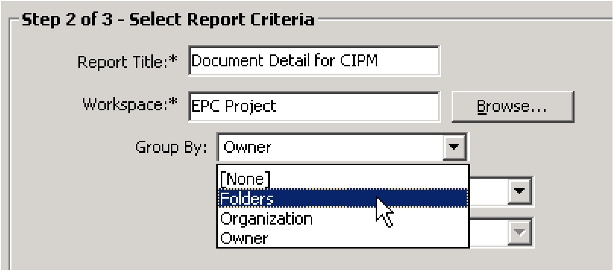
1. Enter a title for the report (required).

   The title should be descriptive enough to stand apart from the other reports in the log.

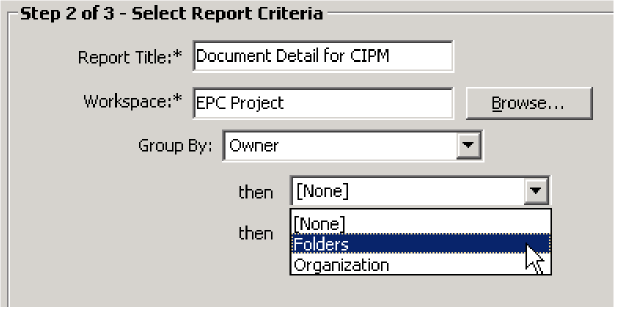
2. Click Browse... to select the desired workspace.



3. In the Select Workspace dialog, enter a portion of the workspace name in the Look For: field and the click Search.
4. Select the desired workspace from the list and click OK to select the workspace.



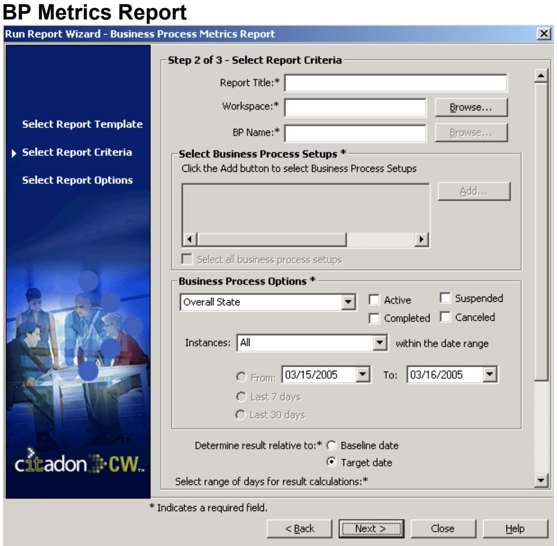
5. From the **Group By:** dropdown list, select top-level grouping criteria (Folders, Organization, or Owner).



6. From the "then" dropdowns, select the next level of grouping (if desired)

7. When finished, click Next >.

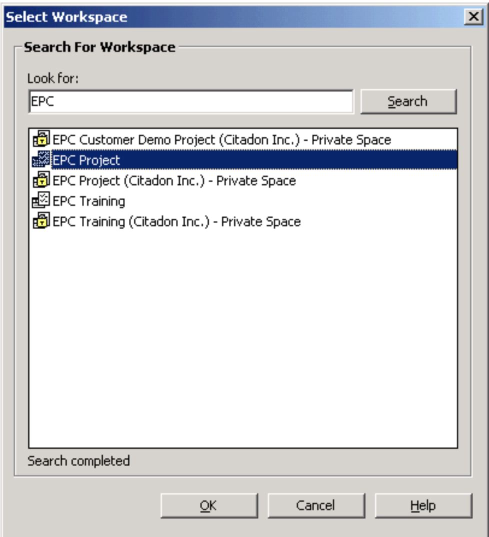
BP Metrics Report



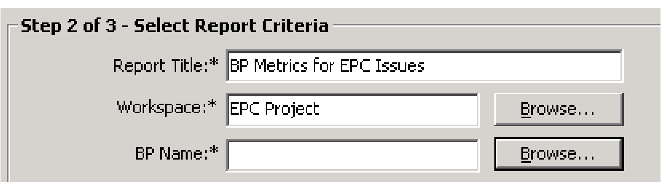
1. Enter a title for the report (required).

   The title should be descriptive enough to stand apart from the other reports in the log.

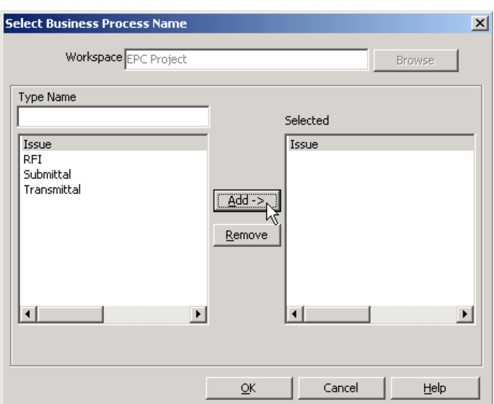
2. Click **Browse...** to select the desired workspace.



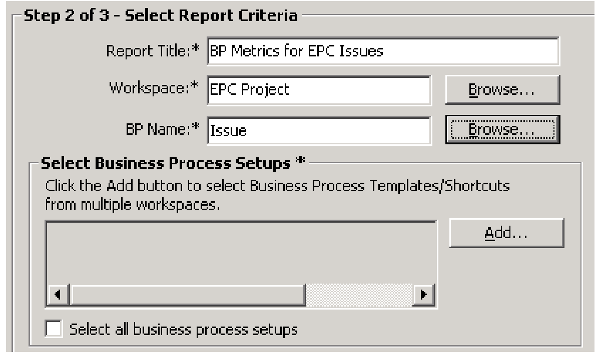
3. In the Select Workspace dialog, enter a portion of the workspace name in the Look For: field and the click **Search**.
4. Select the desired workspace from the list and click **OK** to select the workspace.



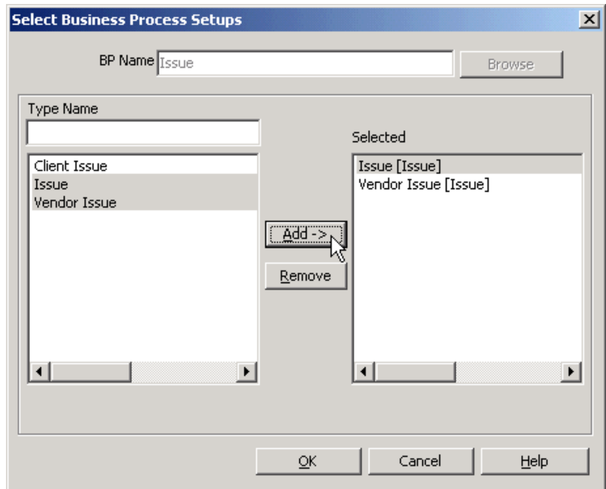
5. Click **Browse...** next to BP Name: to select the business process that the report will run against.



6. Select the business process from the list on the left and then click **Add ->**. Click **OK** to select the business process type.

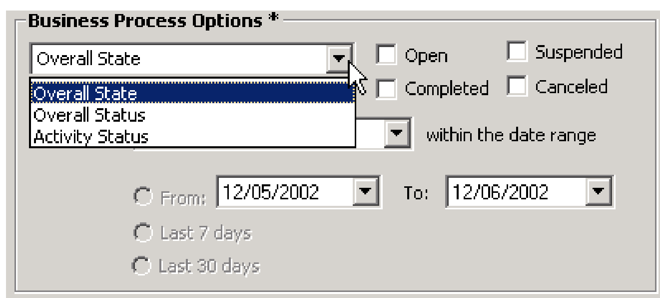


7. Click **Add...** if you want to select specific setups to be reported against. Click **Select all business process setups** to select all setups for this business process type.



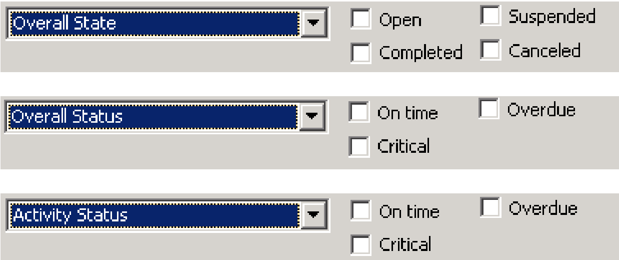
8. Select the desired setup(s) from the list on the left and then click **Add ->**. Click **OK** to confirm the selection.

Business Process Options

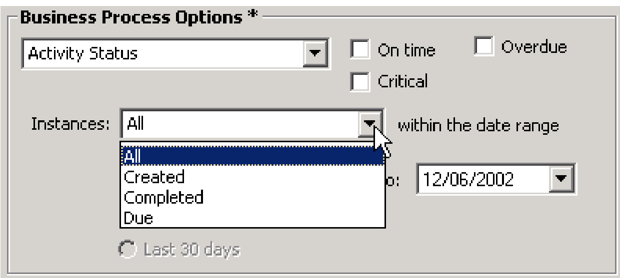


9. Using the dropdown list, select whether you want to report on the Overall State, Overall Status, or Activity Status.

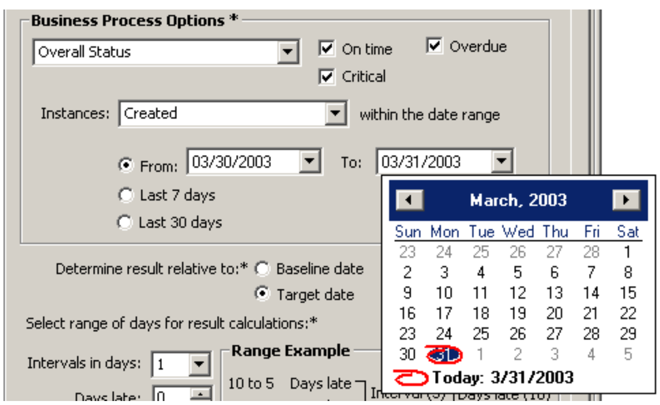
   The check boxes will change for each selection, as shown below:



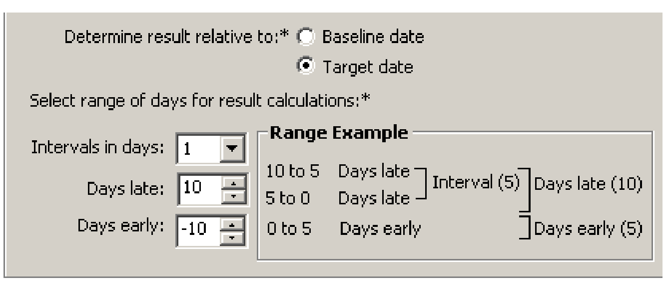
10. Select the desire state(s) or status(es) on which you wish to report.



11. From the Instances: dropdown list, choose whether you want to report on All items, or those Created, Completed, or Due with in a date range.



12. If you selected, **Created, Completed** or **Due**, then select the desired date range for the report by either picking From and To dates, or selecting within the last 7 or 30 days

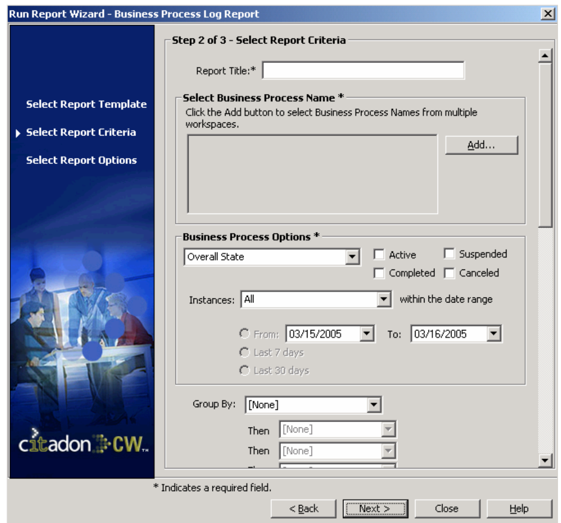


13. Check whether you want the results to be calculated relative to the Baseline Date or the Target Date.

The last three selections tell CW how much data to capture and how granular you want the report

14. The "Intervals in days" determines how granular the report will be. You are selecting the number of days in each interval. In the example above, we've selected 1 day intervals.
15. "Days late" and "Days early" values are setting the limits on how late or early you want to report. Use the up and down arrows to select these values.
16. When finished, click Next >.

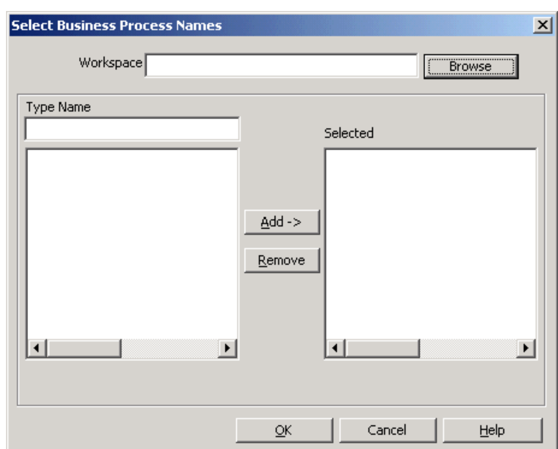
BP Logs Report



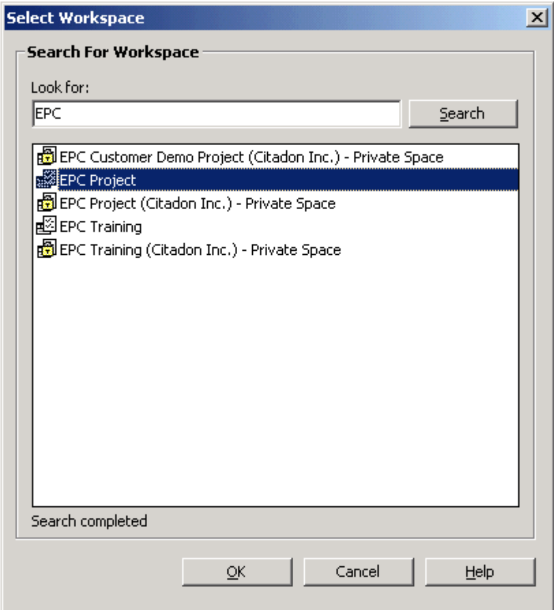
1. Enter a title for the report (required).

   The title should be descriptive enough to stand apart from the other reports in the log.

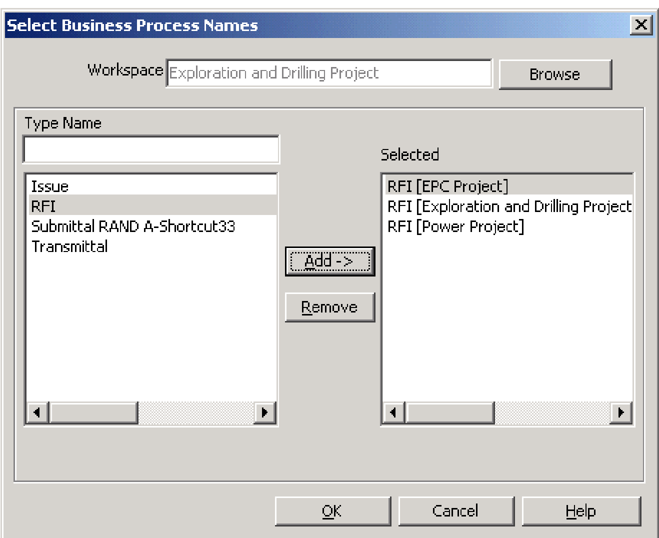
2. Click Add... to select the business process to be reported against.



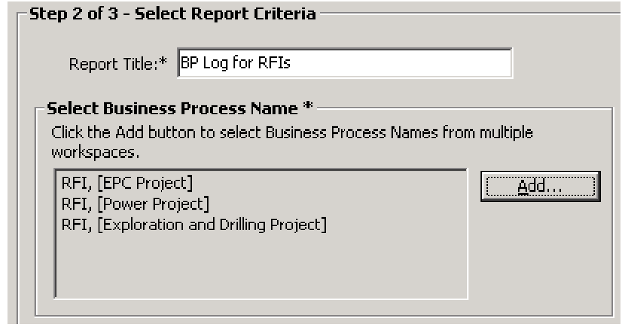
- Click Browse... to select the workspace(s) to report against.



3. In the Select Workspace dialog, enter a portion of the workspace name in the Look For: field and the click Search .
4. Select the desired workspace from the list and click OK to select the workspace.

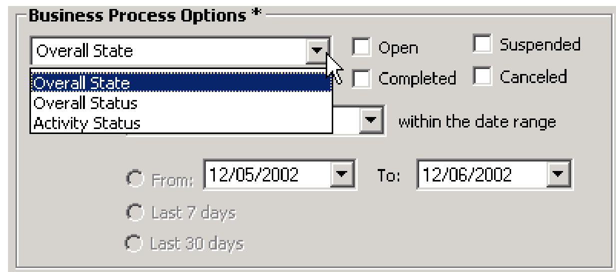


- Repeat the process for each workspace you wish to select from and select the business processes you wish to report against by adding them to the list on the right.
- When finished, click OK



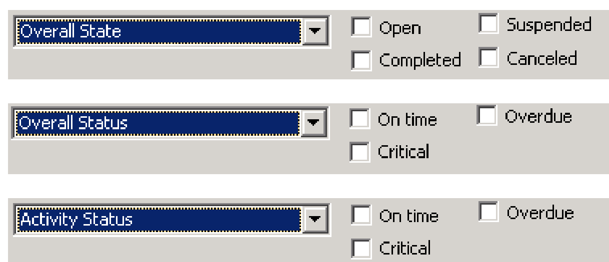
The selected business process types and their respective workspaces are now displayed in the selection list.

Business Process Options

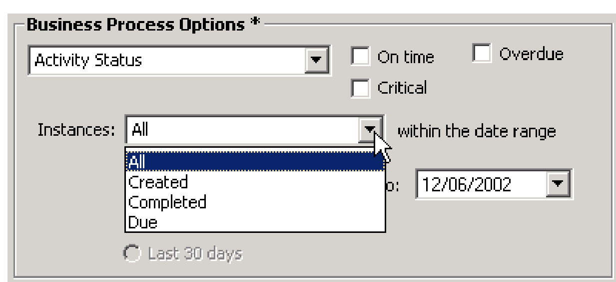


5. Using the dropdown list, select whether you want to report on the Overall State, Overall Status, or Activity Status.

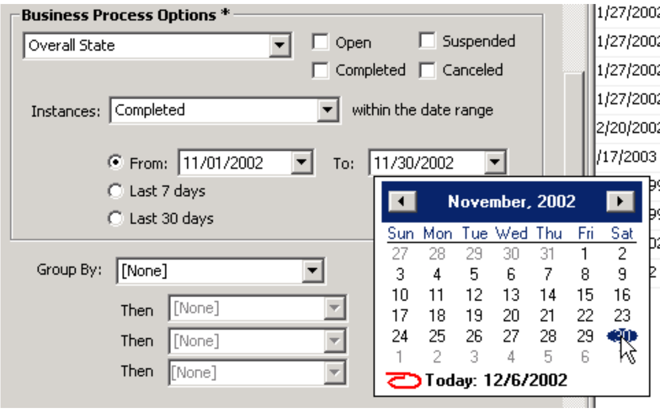
   The check boxes will change for each selection, as shown below:



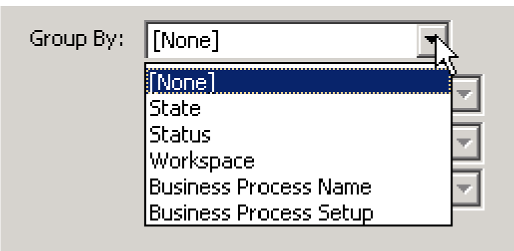
6. Select the desire state(s) or status(es) on which you wish to report.



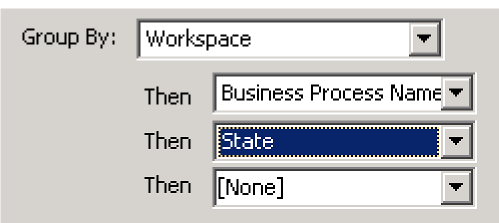
7. From the Instanced: dropdown list, choose whether you want to report on All items, or those Created, Completed, or Due with in a date range.



8. If you selected, **Created, Completed** or **Due**, then select the desired date range for the report by either picking From and To dates, or selecting within the last 7 or 30 days



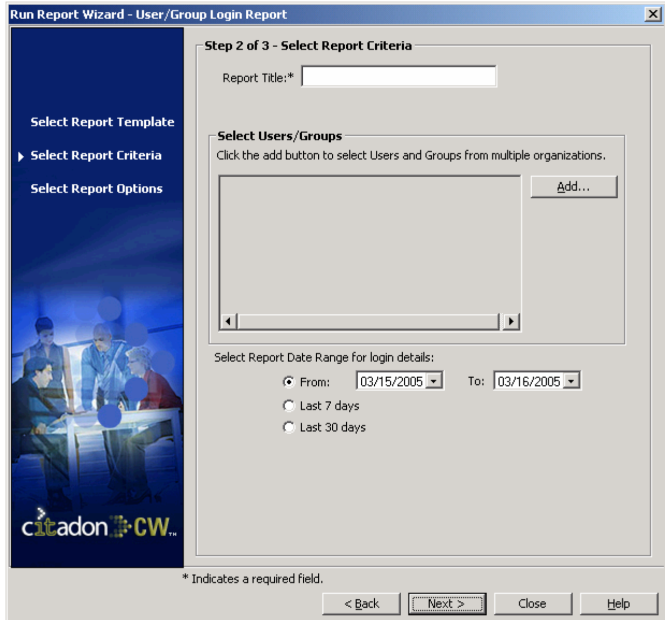
9. From the Group By: dropdown, select how you want your report to be grouped at the top.



10. Repeat for each level of grouping that you desire.

11. When you have finished with all the options, click Next >.

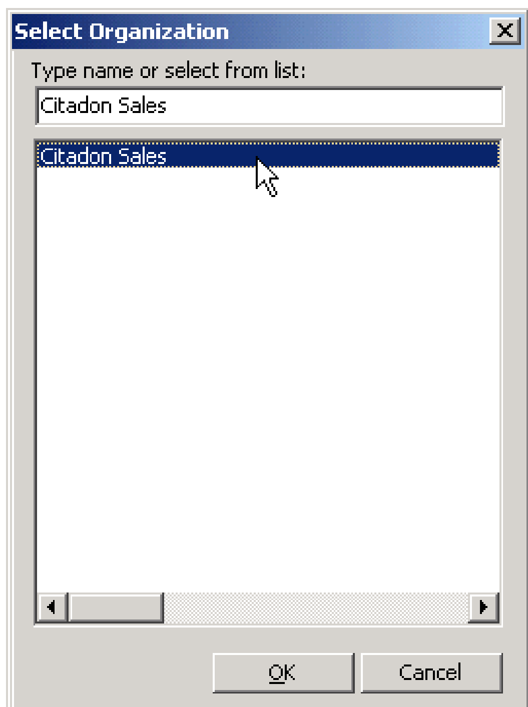
User/Groups/Login Report



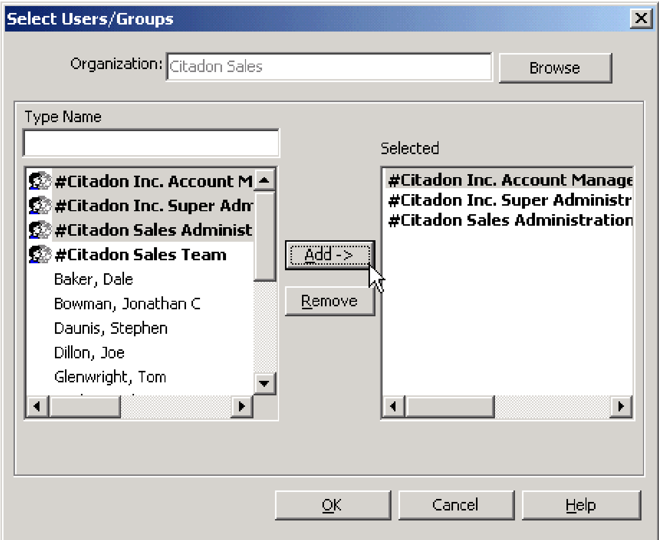
1. Enter a title for the report (required).

   The title should be descriptive enough to stand apart from the other reports in the log.

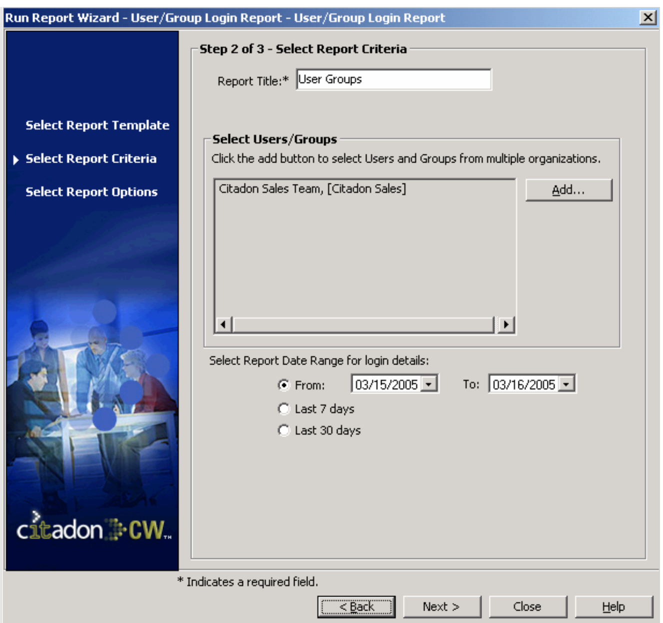
2. Click Add... to select the users and groups to be included.



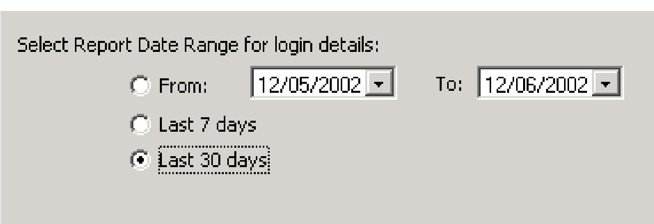
- Select the desired organization and click OK



3. Select the users and groups to be included in the report and click Add -> to select them. When finished click OK to confirm the selection.



The selected users and groups are displayed.



4. Select the date range for the report. For each user listed in the report a detail of logins within the date range selected here is available by clicking on a name.

When finished, click Next >.

Citadon Customer Support

Citadon CW

Hours: 6am - 6pm PST

mailto:support@citadon.com