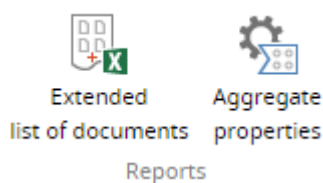


Reports

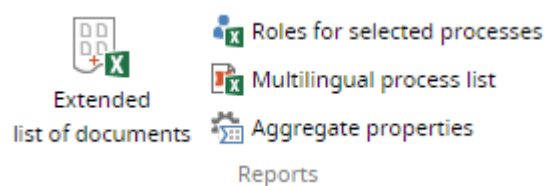
Reports can be used to display direct and indirect relationship structures within the Curator in a concise report, or to find unused documents or to create a list of checked-out documents. Keep reading to find out more.

The **reports** included on the **Tools** tab are for evaluating the knowledge model based on different criteria. The generated reports are particularly useful whenever you want a general tabular overview.

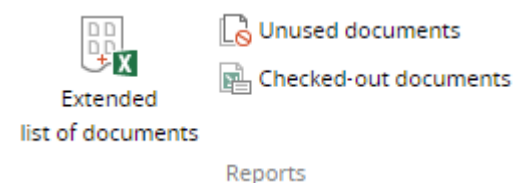
Reports on courses and topics:



Reports on processes:



Reports in the document search:



1 Extended list of documents

The **Extended list of documents** provides an overview of all the documents stored in a particular process, topic or course (or course category). This also takes account of all the selected element's sub-elements. It's also possible to create an extended list of documents for the results of a document search.

You can filter the scope of the list prior to its compilation. The filter criteria are:

- **Document type** of the documents
You can define the document types which the documents in the list must have.
- **Uses**
You can specify whether the documents in the list are used in the Processes, Topics or

Courses view. If one or more "uses" is selected, the table will include a separate column with information on the document's usage.

You can also define the appearance of the list:

- **Sorting**: according to the technical name or title
- **Output format**
 - HTML page: Shows the search results in an HTML page.
 - Excel: Creates an Excel file with the collected data.
 - Search result: Displays the documents found during a document search. The options vary depending on the particular situation.
- The document **properties** (metadata) you want to be displayed in the list can be defined.
- Other **options** can also be set in order to display additional data, e.g. a document's variants or portal links.

2 Aggregate properties

The **Aggregate properties** report aggregates the settings for the respective process, topic or course (or course category). This also takes account of all the selected element's sub-elements.

- Title of chosen element: Displays the title of the respective process, topic or course/course category.
- Number of associated documents: Indicates how many documents are assigned to this element.
- Other document metadata

Should the need arise, it's also possible to show other metadata in the Excel list. The corresponding columns will then always include all the aggregated data on the respective metadata item.

3 Roles for selected processes

This report generates a matrix regarding which roles are assigned to which processes. You can specify the layout of the list:

- Orientation: Processes vertically, Roles horizontally – The report will be drilled down according to processes and their contexts.
- Orientation: Roles vertically, Processes horizontally – The report will be drilled down according to roles and the organizational units to which they belong.

It's also possible to take account of indirect role associations. **Indirect role associations** are roles which are inherited upward from a process step that lies below a process. This logic also applies in the Portal view, where the rule that the main process displays all the roles of the subprocesses also applies.

4 Multilingual process list

The **Multilingual process list** allows you to display the selected process and its subprocesses in the form of a multilingual list of processes.

The relevant information is listed on three worksheets – Process structure, Process properties and Role attributes.

5 Unused documents

The **Unused documents** report displays the documents that are no longer used in any process, topic or course.

6 Checked-out documents

The **Checked-out documents** report displays the documents that are currently checked out. This report can be really helpful whenever you want to implement mass changes to documents (for example). The report allows you to determine which documents are currently checked out, meaning that they won't be affected by the subsequent mass change.