Reports Module

User Manual - Console Interface

SONARWORKS WORKFLOW SYSTEM

Version 1.0

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1. Introduction

The Reports Module provides comprehensive reporting capabilities for the Sonarworks Workflow System. It enables users to generate insights on workflow performance, approval trends, user activity, and organizational metrics.

Key Capabilities:

- Pre-built standard reports
- Flexible date range filtering
- Multiple export formats
- Organizational filtering
- Drill-down capabilities
- Visual charts and graphs

[Screenshot: Reports Module Overview]

Figure: Reports Module Overview

2. Accessing Reports

Steps:

Step 1: Log in to the system

Step 2: Click 'Reports' in the navigation sidebar

Step 3: The Reports list page displays available reports

Step 4: Reports are organized by category

NOTE: Report visibility depends on your assigned roles and permissions.

[Screenshot: Navigation to Reports]

Figure: Navigation to Reports

3. Available Report Types

3.1 Workflow Reports

Report	Description	Key Metrics
Workflow Summary	Overview of all workflows	Total, by status, by type
Pending Approvals	Workflows awaiting approval	Count, age, by approver
Approval Turnaround	Time to process approvals	Average, min, max time
Workflow Volume	Submission trends over time	Daily, weekly, monthly

		counts

3.2 User Reports

Report	Description	Key Metrics
User Activity	User login and action summary	Logins, actions, last active
Approver Performance	Approval speed by user	Approved, rejected, avg time
Initiator Report	Submissions by initiator	Count, approval rate

3.3 Organization Reports

Report	Description	Key Metrics
SBU Workflow Report	Workflows by SBU	Volume, status distribution
Department Summary	Activity by department	Users, workflows, approvals
Branch Performance	Metrics by branch	Volume, processing time

3.4 Financial Reports

Report	Description	Key Metrics
Amount Summary	Financial workflow totals	Total approved, by category
Budget Utilization	Spending against limits	Spent, remaining, %
Approval Limits Report	Usage of approval limits	By approver, by level

4. Running Reports

4.1 Basic Report Execution

Steps:

Step 1: Navigate to Reports module

Step 2: Find and click on the desired report

Step 3: Set report parameters (date range, filters)

Step 4: Click 'Generate Report' or 'Run'

Step 5: Wait for report to process

Step 6: View results on screen

[Screenshot: Report Parameter Screen]

Figure: Report Parameter Screen

4.2 Report Generation Process

Stage	Description	Time
Parameter Entry	User sets filters and options	User-dependent
Data Query	System retrieves data	Depends on data volume
Processing	Calculations and aggregations	Depends on complexity
Rendering	Results displayed/formatted	Usually quick

TIP: Large date ranges or complex reports may take longer to generate. Consider narrowing filters for faster results.

5. Report Parameters

5.1 Common Parameters

Parameter	Type	Description
Date From	Date	Start date of reporting period
Date To	Date	End date of reporting period
Workflow Type	Multi-select	Filter by specific workflows
Status	Multi-select	Filter by workflow status
SBU	Multi-select	Filter by business unit
Branch	Multi-select	Filter by branch
User	Multi-select	Filter by specific user

5.2 Date Range Options

Quick Select	Date Range
Today	Current day
Yesterday	Previous day
This Week	Monday to current day
Last Week	Previous Monday to Sunday
This Month	1st to current day
Last Month	Previous month 1st to last
This Quarter	Current quarter
This Year	January 1st to current day
Custom	User-specified dates

5.3 Using Filters Effectively

- Start with broader date ranges, narrow if needed
- Use organizational filters to focus on your area
- Combine multiple filters for specific analysis
- Save common filter combinations as presets (if available)

6. Viewing Report Results

6.1 Result Display Types

Display	Description	Best For
Table	Rows and columns of data	Detailed data, exports
Chart	Visual graphs and charts	Trends, comparisons
Summary	Key metrics cards	Quick overview
Combined	Mix of above	Comprehensive reports

[Screenshot: Report Results View]

Figure: Report Results View

6.2 Chart Types

Chart Type	Use For
Bar Chart	Comparing categories, rankings
Line Chart	Trends over time
Pie Chart	Distribution, proportions
Area Chart	Cumulative trends
Stacked Bar	Composition comparisons

6.3 Interacting with Results

- Click on table headers to sort
- Click on chart elements to see details
- Hover for tooltips with exact values
- Use pagination for large result sets
- Drill down by clicking linked values

6.4 Drill-Down Functionality

Many reports support drill-down to see underlying details:

Example: Drill-Down Example

Report: Workflow Summary
View: 45 Pending workflows

Click "45 Pending" ->
Opens detailed list of all 45 pending workflows
With reference numbers, dates, current approvers

Click any workflow ->

Opens the specific workflow instance detail

7. Exporting Reports

7.1 Export Formats

Format	Description	File Type
Excel	Microsoft Excel format	.xlsx
CSV	Comma-separated values	.csv
PDF	Portable Document Format	.pdf

7.2 How to Export

Steps:

Step 1: Generate the report with desired parameters

Step 2: Review results to ensure correctness

Step 3: Click the 'Export' button

Step 4: Select the desired format

Step 5: File downloads to your computer

7.3 Export Options

Option	Description
Include Charts	Export visual charts (PDF/Excel)
Include Summary	Export summary section
Include Details	Export detailed data rows
Page Orientation	Portrait or landscape (PDF)

7.4 Email Report

Some reports can be emailed directly:

Steps:

Step 1: Generate the report

Step 2: Click 'Email' button

Step 3: Enter recipient email addresses

Step 4: Select format and include message

Step 5: Click 'Send'

8. Scheduled Reports

Scheduled reports automatically run and deliver at specified intervals.

8.1 Scheduling Options

Frequency	Description
Daily	Runs every day at specified time
Weekly	Runs on specified day of week
Monthly	Runs on specified day of month
Quarterly	Runs at quarter end
Custom	Custom cron expression

8.2 Creating a Schedule

Steps:

Step 1: Open the report you want to schedule

Step 2: Click 'Schedule' button

Step 3: Set the frequency and time

Step 4: Configure parameters (date range becomes relative)

Step 5: Set delivery method (email, save to system)

Step 6: Enter recipients if emailing

Step 7: Click 'Save Schedule'

8.3 Managing Schedules

- View scheduled reports in Reports > Scheduled
- Edit schedule parameters and recipients
- Pause or resume schedules
- Delete schedules no longer needed
- View schedule run history

NOTE: Scheduled reports use relative date ranges (e.g., 'Last Week') that adjust automatically.

9. Best Practices

9.1 Report Selection

- Use the right report for your question
- Start with summary reports, drill into details
- Combine multiple reports for complete picture
- Create schedules for regularly needed reports

9.2 Performance Tips

- Use specific date ranges (avoid 'All Time')
- Apply organizational filters when possible
- Run large reports during off-peak hours
- Schedule complex reports instead of running ad-hoc

9.3 Data Interpretation

- Consider the context of the data
- Compare similar time periods fairly
- Account for organizational changes
- Verify unexpected results before acting

9.4 Sharing Reports

- Export to appropriate format for audience
- Include context/explanation with exports
- Remove sensitive data before external sharing
- Use PDF for formal presentations

9.5 Troubleshooting

Issue	Solution
Report takes too long	Narrow date range, add filters
No data in report	Check filters, verify data exists
Export fails	Try smaller data set, different format
Schedule not running	Check schedule is active, verify recipients