Wolters Kluwer

legisway essentials

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User Manual

Reporting Suite

Contents

1 Report overview

The improved Reporting Suite allows you to create your own customized report by making use of a variety of options. To gain an idea of the major changes regarding to the old reporting tool, please read the following information attentively.

Starting from the Legal Management Dashboard, you can click on the Reports icon as shown in figure 1.

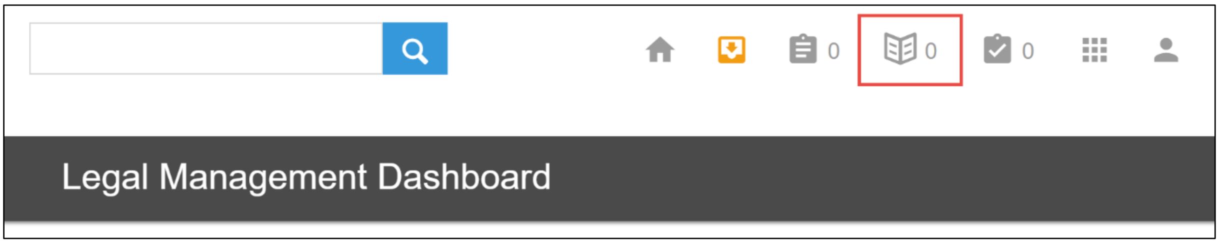


Figure 1: Reports icon

The system will lead you to the “Personal Reporting” screen with all the matter types (figure 2). You will be able to create your personal report from each of the subsequent types.

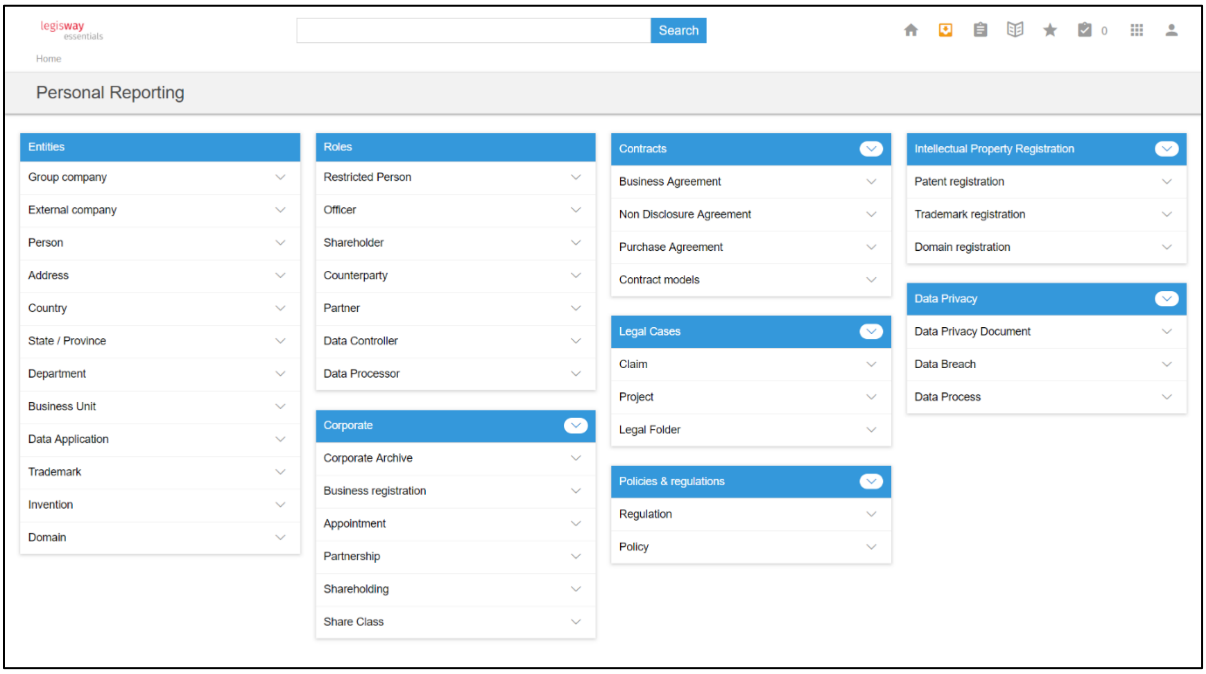


Figure 2: personal reporting and all additional standard legal themes.

2 Cases

The following cases will show you how to use the reporting tool and highlight the advanced options.

2.1 Case 1: All necessary options in one screen to create a perfect report

One of the main advantages is that you can now easily change all kinds of settings in the same screen (figure 3). Below is an explanation of where to find these settings and how to use them.

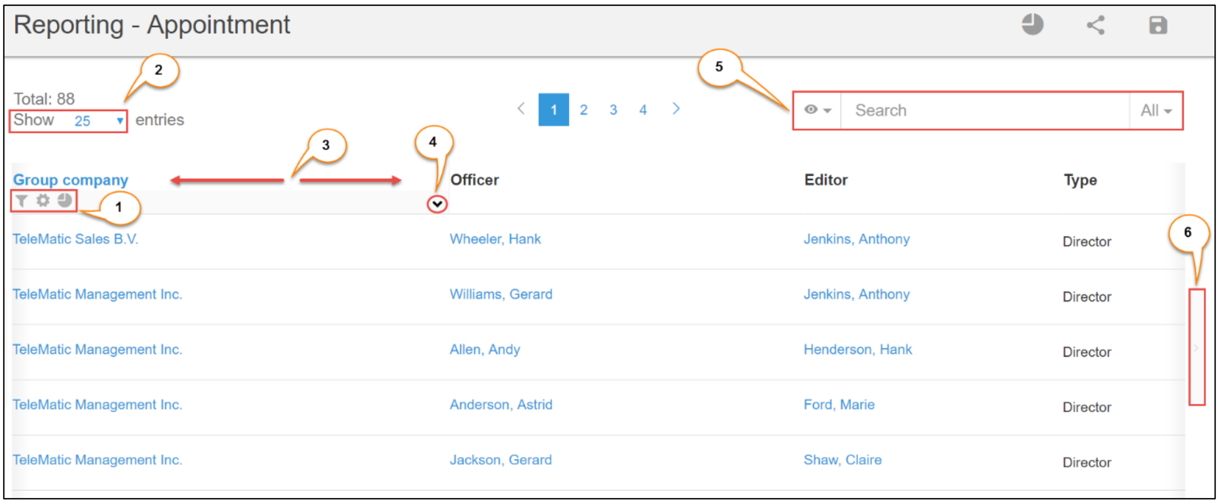
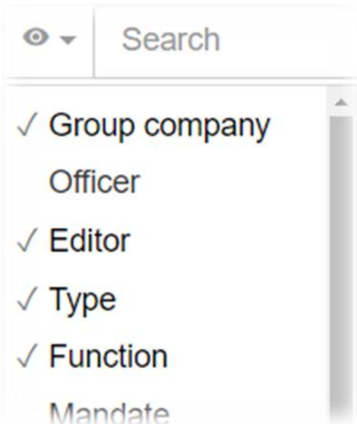
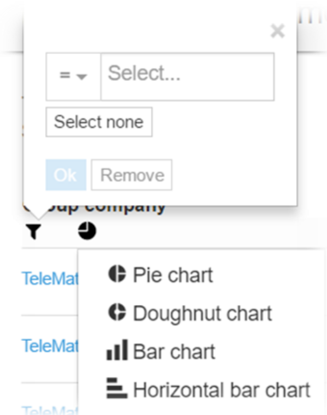


Figure 3: Overview report settings

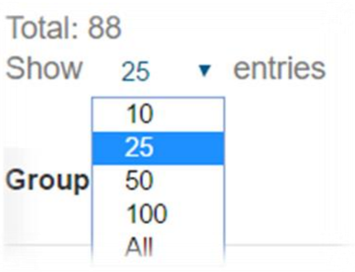
1. **Quick results:** Make columns visible or invisible by clicking on them. Use the search bar to search for specific information in the report.



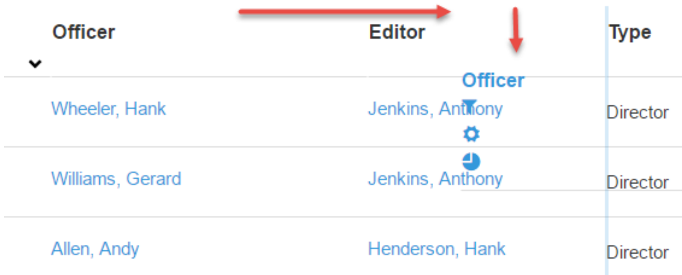
2. **Quick filter:** When you move your mouse along each header, a few icons will be visible that allow you to filter on information, add relational fields or present the data from this column into a chart.



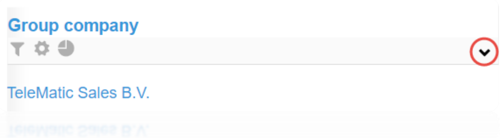
3. **Number of results:** Change the amount of entries that are visible on a single page.



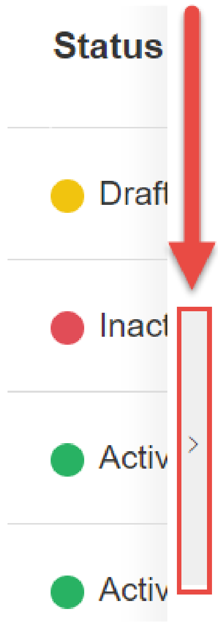
4. **Re-Index:** Change the sequence of columns by using the drag and drop function.



5. **Sort order:** Sort the alphabetic order from A-Z or Z-A.



6. **Scroll through columns:** If there are too many columns in the report, some of them are not directly visible in the screen. Use this button if you want to see the other columns.



2.2 Case 2: Save your Personal customized report as favorite

After you have created your report with all the necessary information, you can save this report as a favorite, in case you want to use this report more often. Click on the save button at the right upper corner (figure 4). With this first save option you will store reports which will only be visible to you.

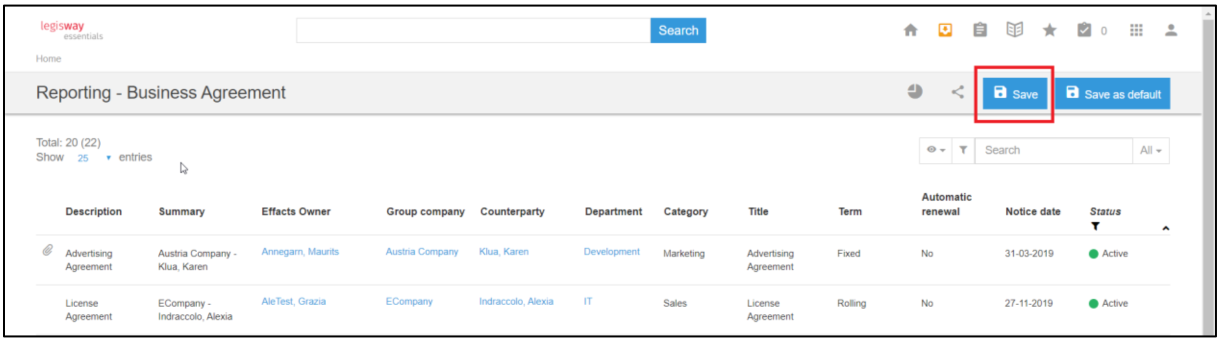


Figure 4: Save your Personal report as favorite

The system will show you a pop-up screen where you can enter a Report title (figure 5). Click on the [Create] button to save this report as favorite.

Figure 5: Create Report Configuration form

The report will be placed under the previously selected type (figure 6).

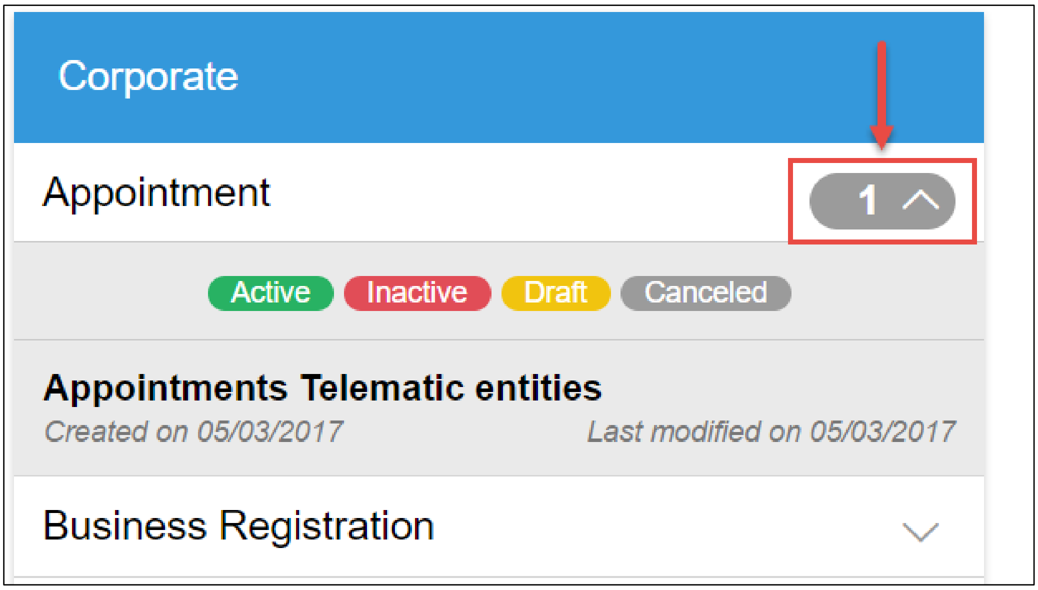


Figure 6: Personal report as favorite

2.3 Case 3: Save as default / Monthly reporting (administrators only)

In addition to saving report templates for personal use, administrators have an extra save button [Save as default] that allows them to set and update the default report periodically. The default report is the report all users see when they select a certain type in the **Reporting Suite**.

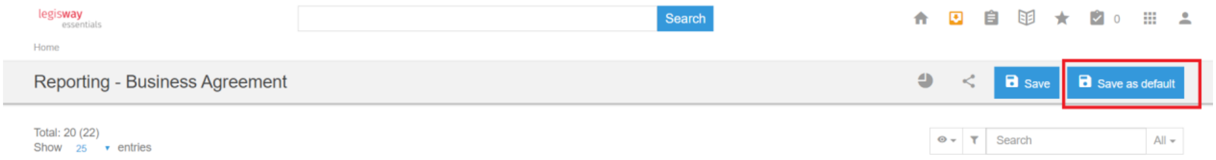


Figure 4a: save as default button

Any columns and filters the administrator has set, will be visible to the next user that would like to generate a report of a type. Editors will still be able to modify the default template, but any changes made will not be visible to other. If editors would like to save a template, please attend them of the regular save option as explained in previous section 2.2.

2.4 Case 4: Improved PDF export settings

After you have finalized a report, it might be necessary to share it with colleagues for internal purposes. Use the share button to export the information to Word, Excel or PDF (figure 7).

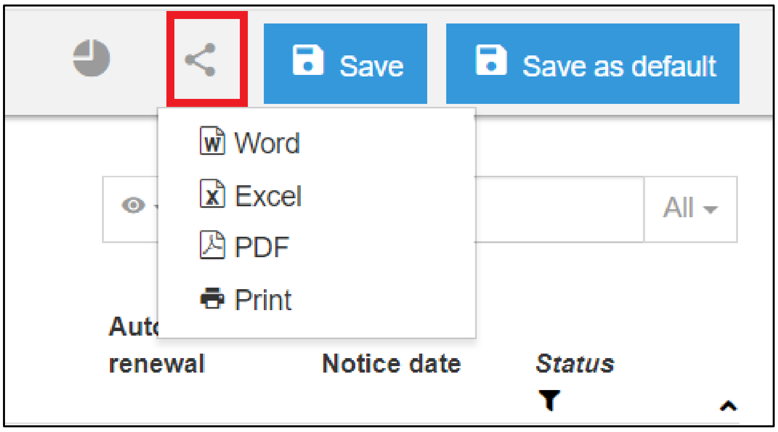


Figure: Share button

The PDF export settings have been improved with some extra fields like the page size and orientation (figure 7).

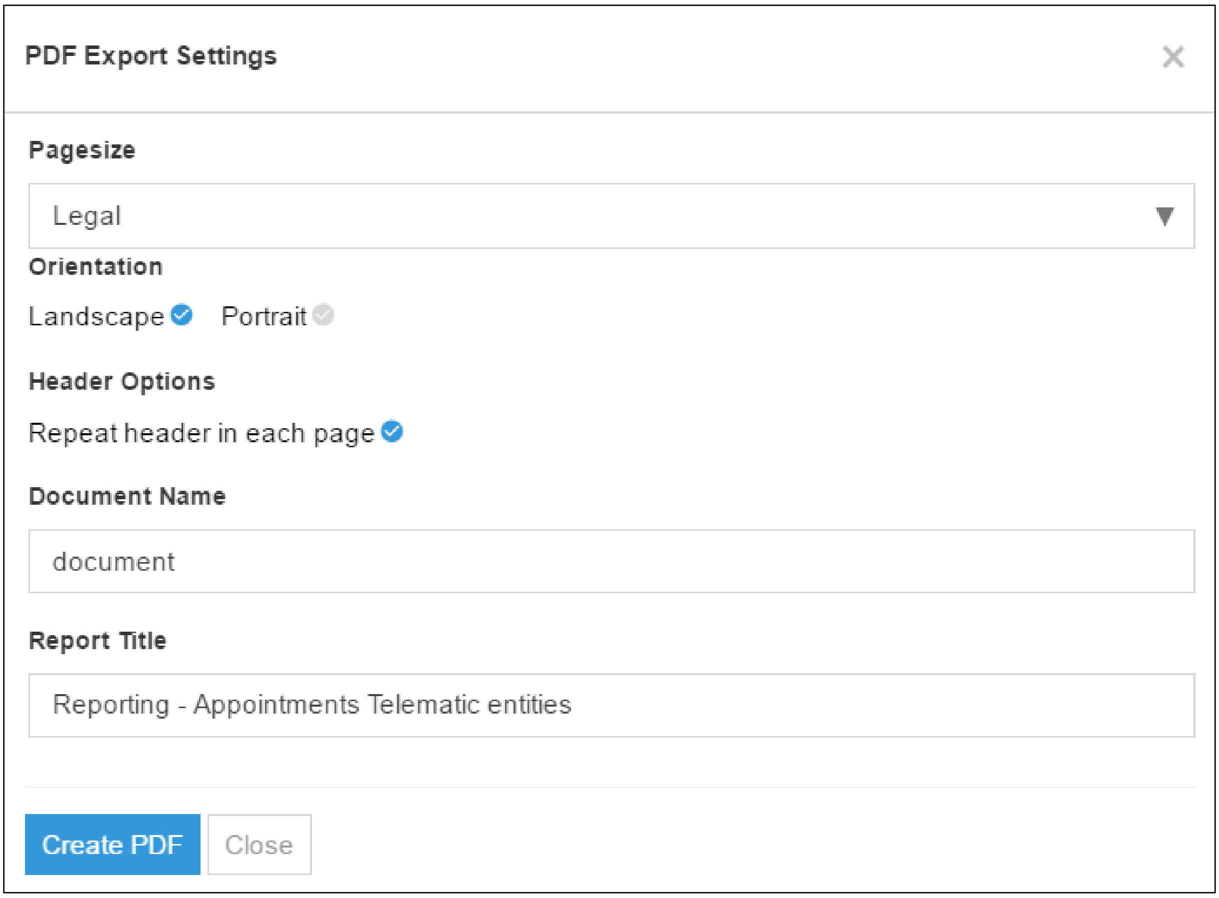


Figure 7: PDF Export settings form

After you fill in all the fields, please click on the button [Create PDF] to save the file on your computer.

2.5 Case 5: Data visualization by using charts

Analyzing lengthy excel sheets are now of the past. From now on you can easily visualize the information in several different charts. This option allows you to share information in a more attractive way.

Use the icon as shown in figure 8 to load the configuration menu or directly on the column (see point 2 from case 1).

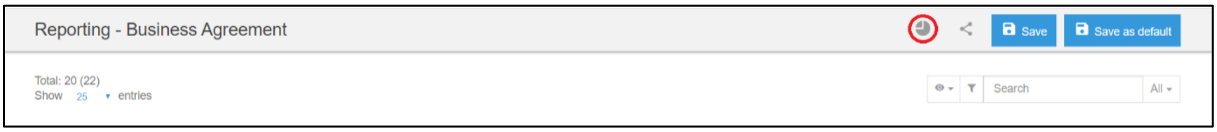


Figure 8: Chart button

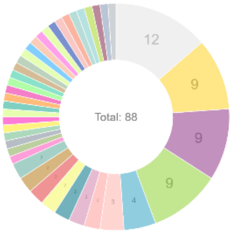
Once you are in the configuration screen, you can select a column and the chart type (figure 9).

Figure 9: Report chart configuration form

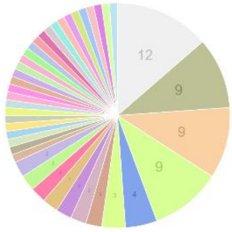
Charts are available on:

- Entity relations (companies, persons, country etc.)
- Fields with list value and Boolean
- Status

Chart types:

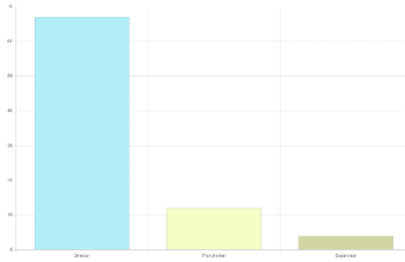


Pie chart



Doughnut chart

Horizontal bar chart



Bar chart

The following Pie chart presents the number of active business contracts divided per department (figure 10).

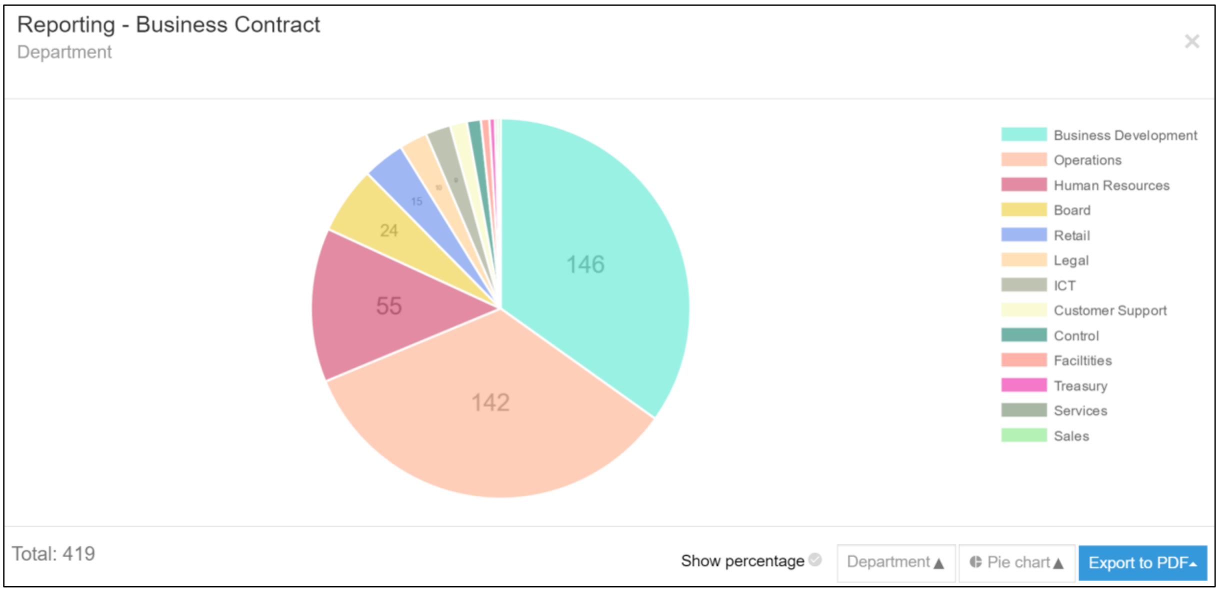


Figure 10: Number of Business Contracts divided per department

The following Bar chart presents the number of business contracts divided per Group Company (figure 11).

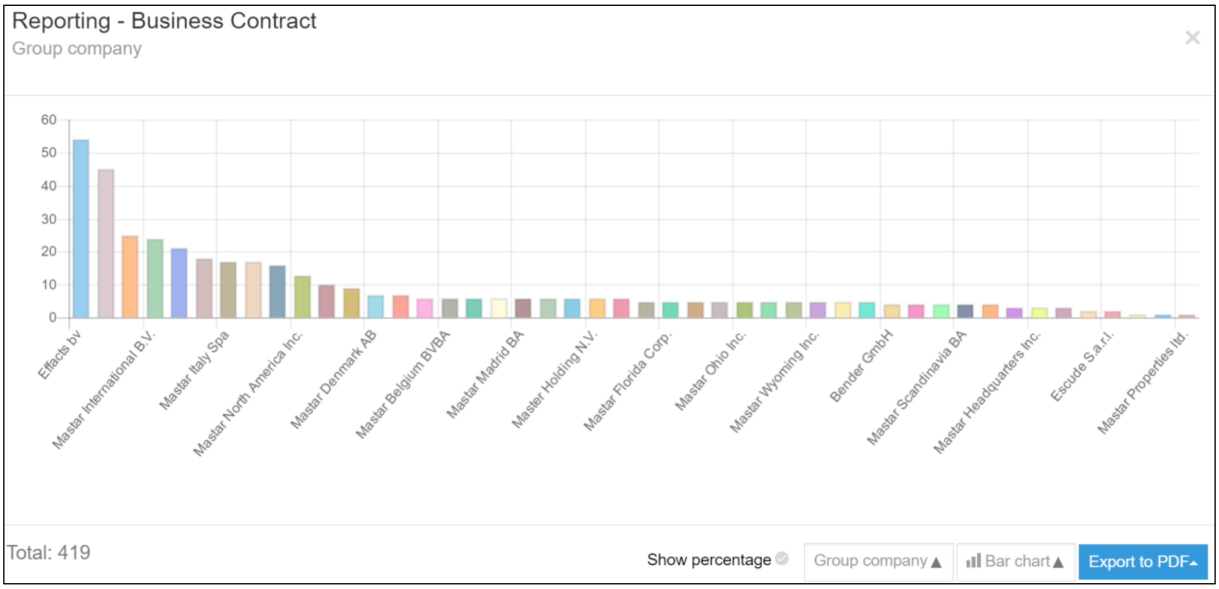
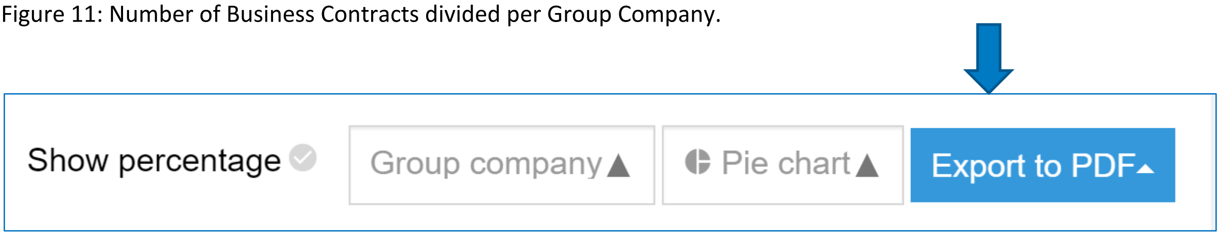


Figure 11: Number of Business Contracts divided per Group Company.



- Show percentage: Change the numbers in the graphic on the left axis into percentages.
- Group Company: Change the column into e.g. editor or department.
- Pie chart: Change the Chart type to e.g. Bar chart or Doughnut chart.
- Export to PDF: Export the chart with or without table to PDF.