

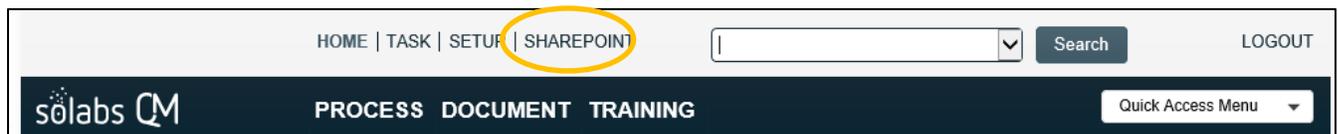
## SOLABS QM 10 Reports

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Integrating SharePoint/SOLABS QM for Reporting.....	1
Accessing SOLABS QM Reports Through the SharePoint Portal.....	2
Getting Your SOLABS Unique ID, if Required.....	2
The SharePoint Reporting Interface .....	3
Report Types.....	3
Excel Reports.....	4
<b>Running an Excel Report</b> .....	4
<b>Viewing an Excel Report</b> .....	5
<b>Sharing an Excel Report</b> .....	5
<b>Modifying and Saving a Customized Copy of an Excel Report</b> .....	6
SSRS Reports .....	8
<b>Running an SSRS Report</b> .....	8
<b>Viewing an SSRS Report</b> .....	9
<b>Sharing an SSRS Report</b> .....	11
<b>Creating Subscriptions to SSRS Reports to receive them by email</b> .....	12
<b>Modifying or Adding an SSRS Report</b> .....	12

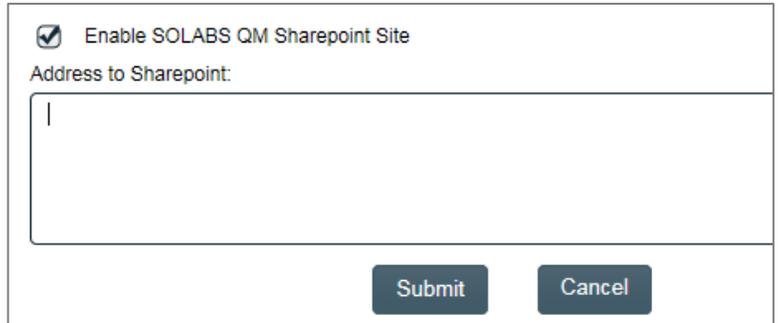
### Integrating SharePoint/SOLABS QM for Reporting

If your instance of **SOLABS QM** has been set up with a link to SharePoint, you will see **SHAREPOINT** at the top of the screen. If you see the link but it is in italics, then you yourself have not been given access. Contact your local SOLABS System Administrator, who will be able to provide that access.



If you do not see the **SHAREPOINT** option at the top of the screen, it needs to be set up as part of **System Configurations** for your instance. As a user with the System Role **SOLABS System Administrator** access **SETUP > Administration > System Configurations > System Configurations**.

At the bottom of the **System Configurations** screen check the box next to **Enable SOLABS QM SharePoint Site** and then paste the main SharePoint Reporting link (which will look something like this: [https://\[DOMAIN\].solabs.com/sharepoint/](https://[DOMAIN].solabs.com/sharepoint/)) into the **Address to SharePoint** field. Click **Submit** and then **Confirm** to save the change. Submit a support request if you need the URL.

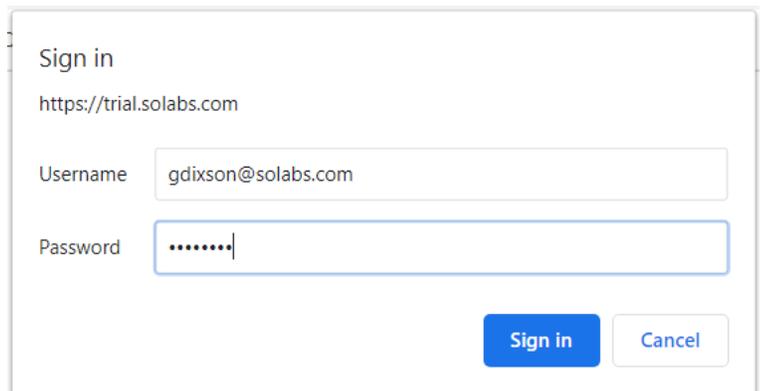


## Accessing SOLABS QM Reports Through the SharePoint Portal

Click **SHAREPOINT** at the top of the SOLABS QM screen.

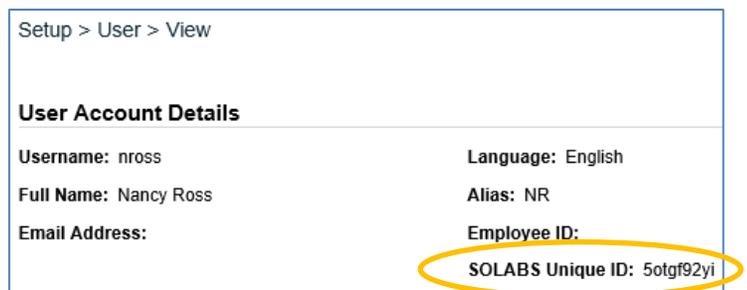
If you have been provided with access to the SharePoint Portal, enter your SOLABS QM **User Name** and **Password** and click **Sign in**.

- **User Name**
  - = SOLABS QM Username (email address format starting with version 10.8)
  - = SOLABS\SOLABS Unique ID for earlier versions
- **Password** = Your regular SOLABS QM login password



### Getting Your SOLABS Unique ID, if Required

To find your **SOLABS Unique ID**, click on **SETUP** to display your User Profile and look in the **User Account Details** section. This is only necessary for versions lower than 10.8.



Also starting with SOLABS QM10 Version 10.8, System Administrators can grant access to the SharePoint Portal for users with a Login Type of SOLABS Identity, OneLogin or AzureAD.

There are four levels of **SharePoint Access** that can be granted:

- **Limited View** access allows users to view and execute reports in the Production Library.
- **View** access allows users to view and execute reports in the Validation Library and the Production Library.
- **Modify** access allows users to view, add, update and delete list items and documents in the Validation Library and the Production Library.
- **Full Control** access allows users full control access for administration of reports in the Validation Library and the Production Library.

Setup > User > Create User

### User Account Settings

\* Account Type:

\* Login Type:

\* Sharepoint Access: 

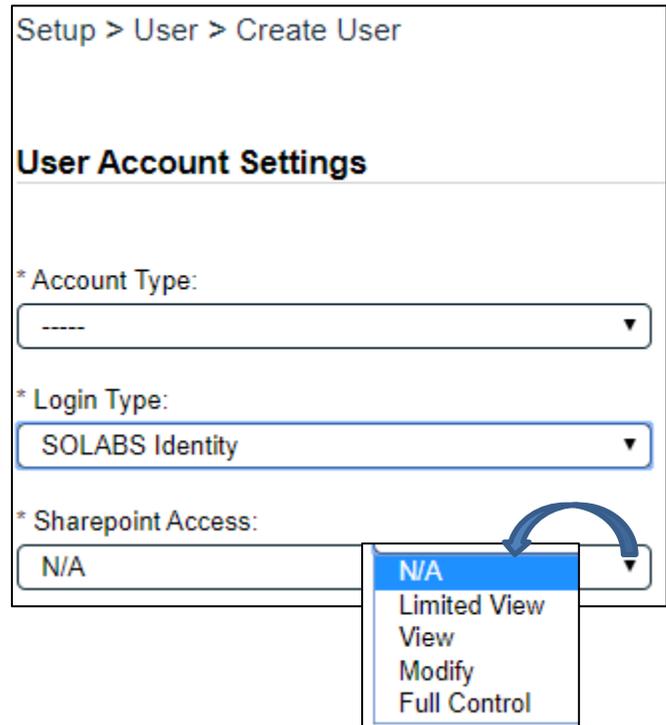
N/A

Limited View

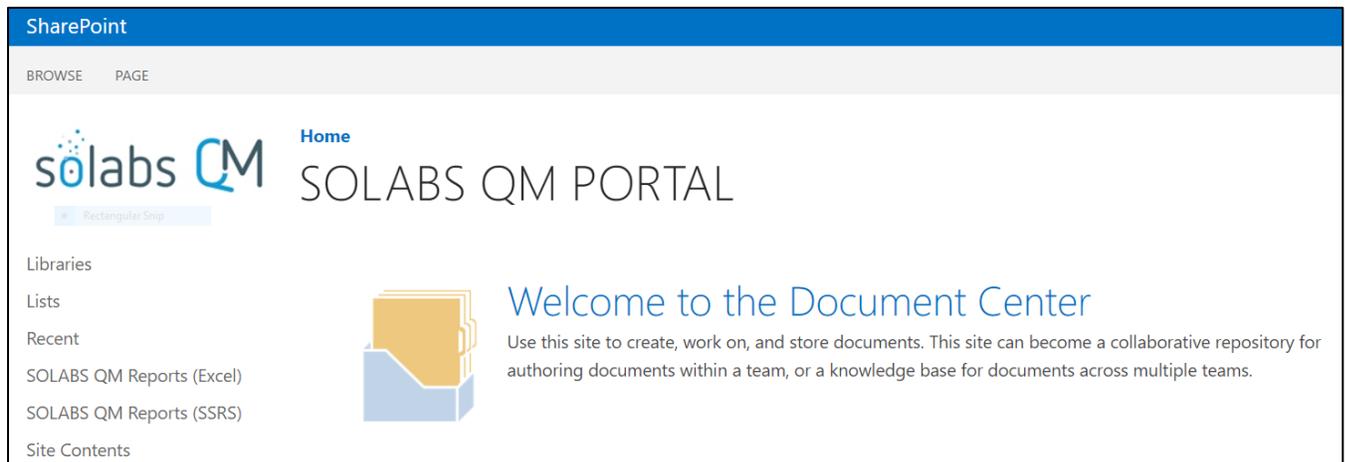
View

Modify

Full Control



## The SharePoint Reporting Interface



## Report Types

- **Excel reports:** These reports are datasets that include SOLABS QM metadata and allow users to create custom reports using standard Excel capabilities such as formatting, sorting, filtering, pivot tables, charts and graphs, etc.
- **SSRS reports (SQL Server Reports):** These reports are available for specific data sets and allow for more advanced reporting and for more complex client-specific reports.

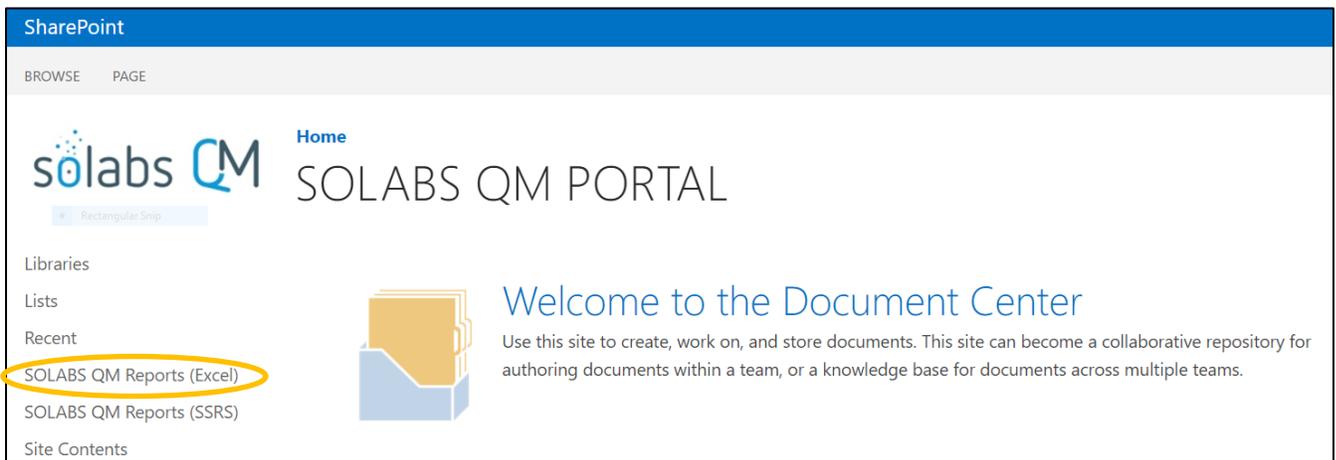
### Excel Reports

The list to the right includes some available **Excel Reports**.

- Document Expanded Document Metadata Training01 ✖
- Document Expanded Document Workflow Training01 ✖
- Process Tasks Training01 ✖
- Process Values Training01 ✖
- Setup Role Inventory Training01 ✖
- Setup User Inventory Training01 ✖
- Setup User Role Mapping Training01 ✖
- Task End User Inventory Training01 ✖
- Training Activities Inventory Training01 ✖
- Training End User Activities Training01 ✖
- Training End User Profiles Training01 ✖
- Training Job Title Profiles Training01 ✖

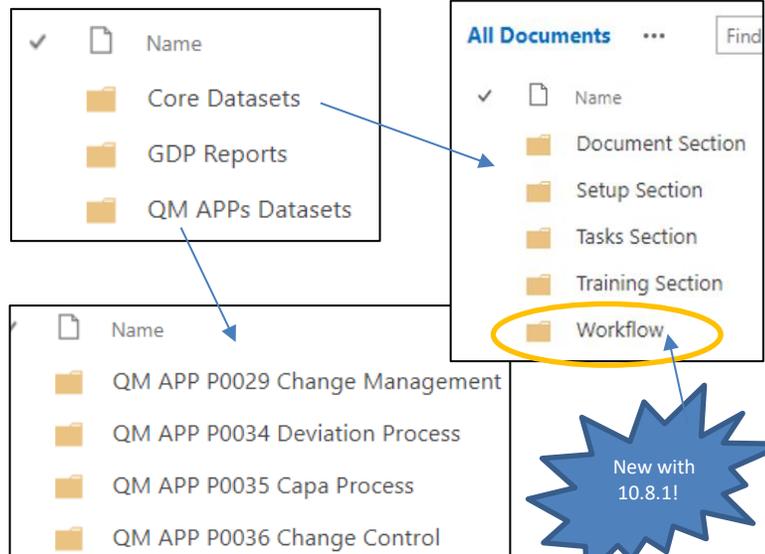
### Running an Excel Report

To open an Excel spreadsheet, choose SOLABS QM Reports (Excel) from the left-hand menu.



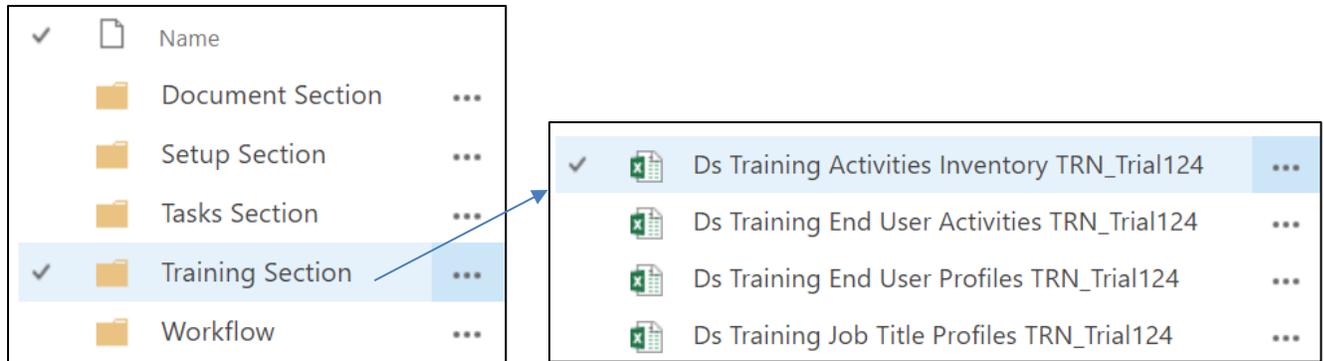
You will then see folders for Core Datasets and QM APPs Datasets (if any QM Apps are deployed in your instance of SOLABS QM 10). If you have created folders to store customized versions of any Excel Datasets, you will also see those named folders (see below for **Modifying and Saving an Excel Report**).

With version 10.8.1 there is a Workflow Dataset that provides status information for all activities currently in progress for a user, in any section of QM10.



### Viewing an Excel Report

To view an Excel Report, click on the related folder and then on the desired spreadsheet.



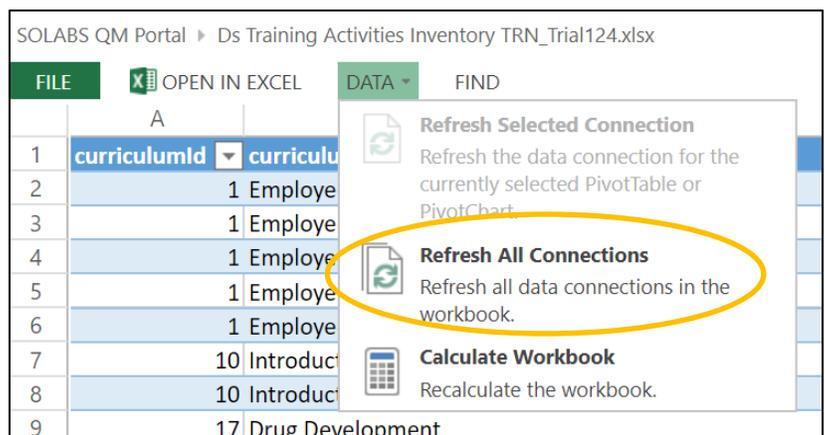
The spreadsheet will open for you to view. **NOTE:** There is no need click on Open in Excel to view the spreadsheet. In fact, this option will not work for hosted clients.

SOLABS QM Portal > Ds Training Activities Inventory TRN\_Trial124.xlsx

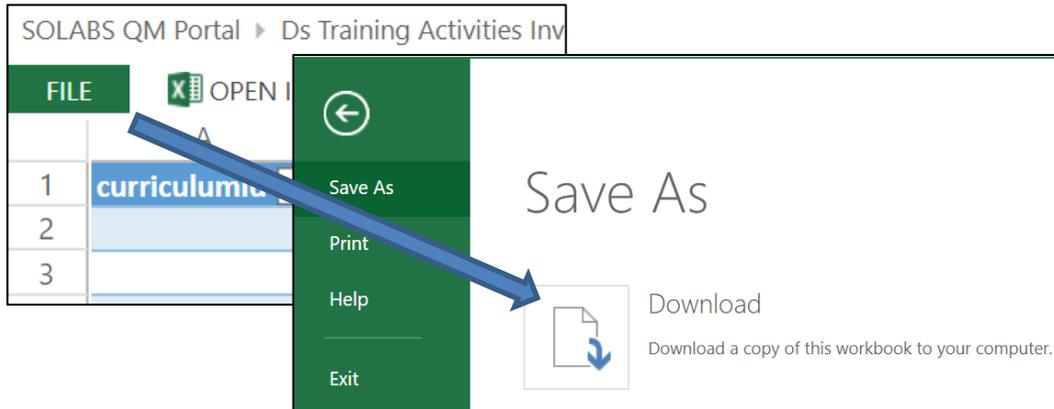
	A	B	C
1	curriculumId	curriculumName	curriculumStatus curriculumDescription
2	1	Employee Orientation	Open These orientation sessions for ne
3	1	Employee Orientation	Open These orientation sessions for ne
4	1	Employee Orientation	Open These orientation sessions for ne
5	1	Employee Orientation	Open These orientation sessions for ne
6	1	Employee Orientation	Open These orientation sessions for ne
7	10	Introductory Training for Microbiology Lab Personnel	Open Intro training for Micro Lab perso
8	10	Introductory Training for Microbiology Lab Personnel	Open Intro training for Micro Lab perso
9	17	Drug Development	Open Skillpad Training Modules related
10	17	Drug Development	Open Skillpad Training Modules related
11	18	Introduction to GCP and Clinical Trial Process	Open
12	18	Introduction to GCP and Clinical Trial Process	Open
13	18	Introduction to GCP and Clinical Trial Process	Open
14	31	Finance Policy Training	Open
15	31	Finance Policy Training	Open
16	31	Finance Policy Training	Open

### Sharing an Excel Report

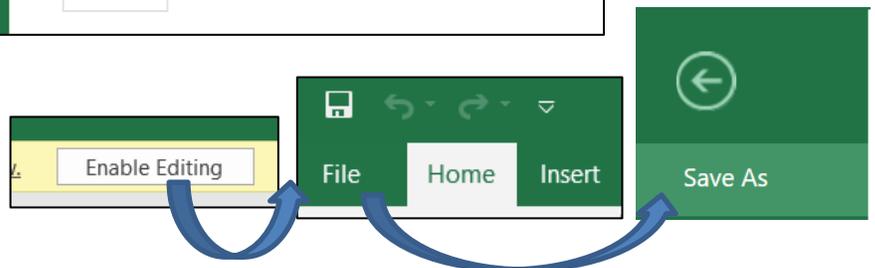
To download a local copy of an Excel report for sharing, it is important to first ensure the data is the most current. To do this, open the **DATA** menu and choose **Refresh All Connections**.



Then open the **File** menu and choose the **Download** option.



When the file downloads, open it, click **Enable Editing** and then from the **File** menu choose **Save As**.

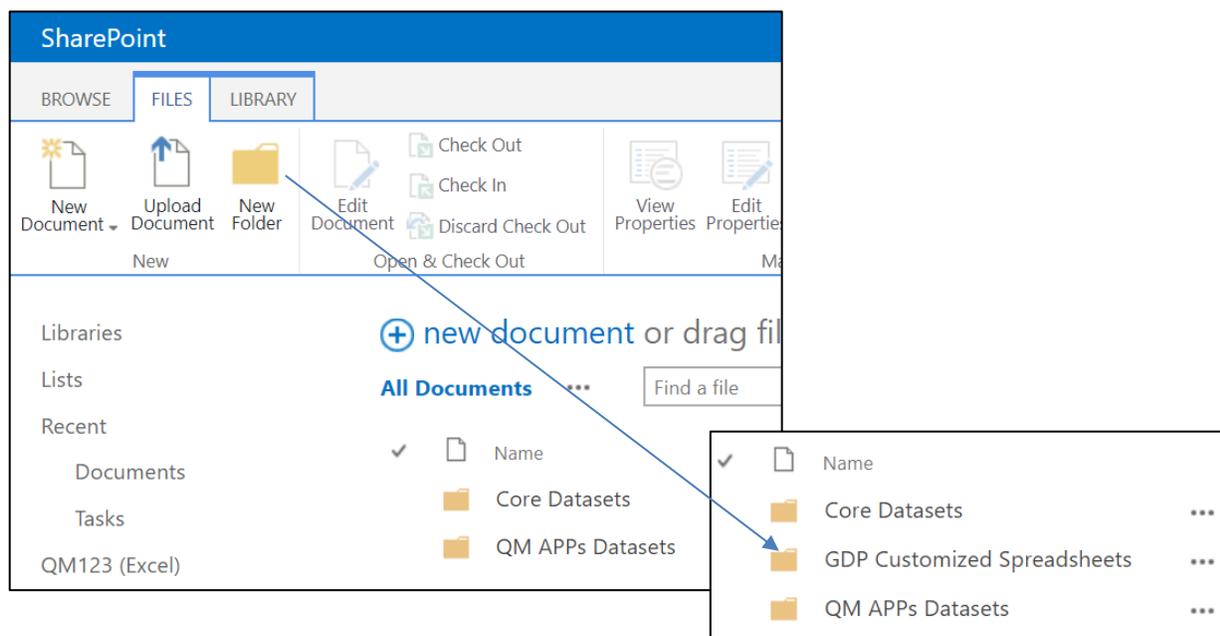


### Modifying and Saving a Customized Copy of an Excel Report

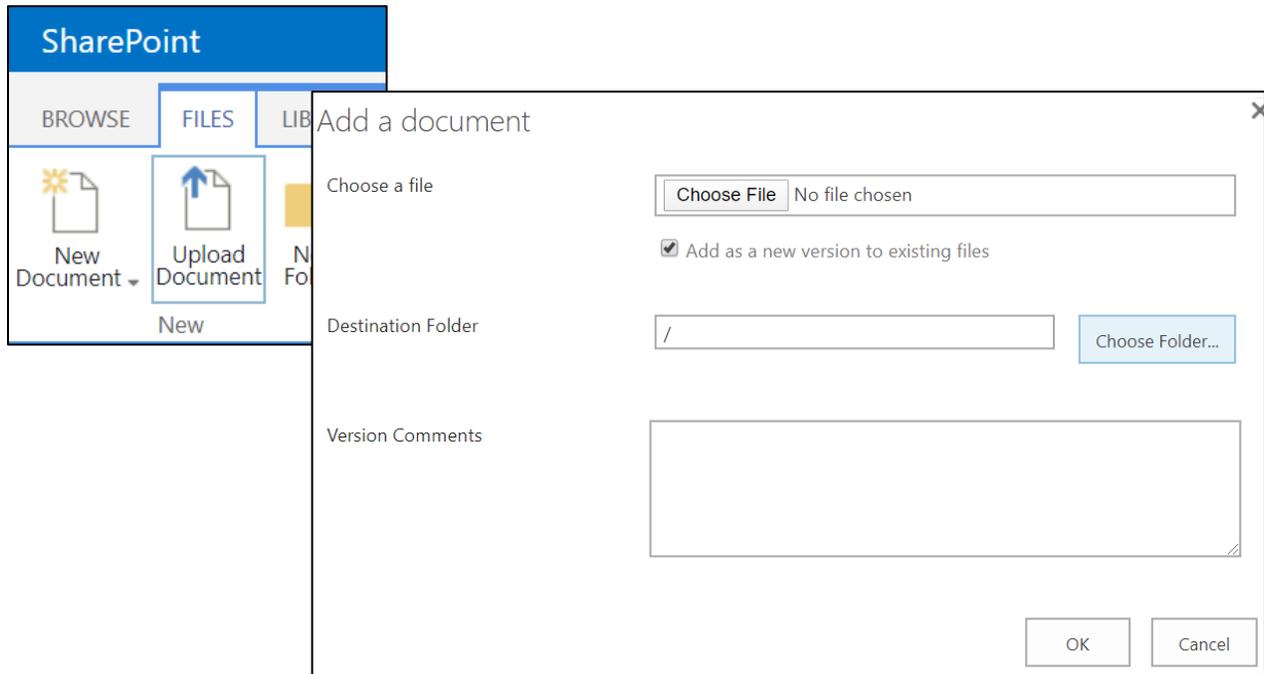
Excel Reports can be modified as needed, using standard Excel functionality, to create customized versions for your company. This can be helpful if you only want certain columns or rows of data from a larger spreadsheet and that information is not available as a separate Excel or SSRS report.

To do this, download a copy to your desktop following the instructions in the previous section. Be sure to **save the Excel Report as a new name** (ex: QA Department Training Activities) when you choose the Save As option to save it to your computer desktop. Make and save the desired modifications to the spreadsheet.

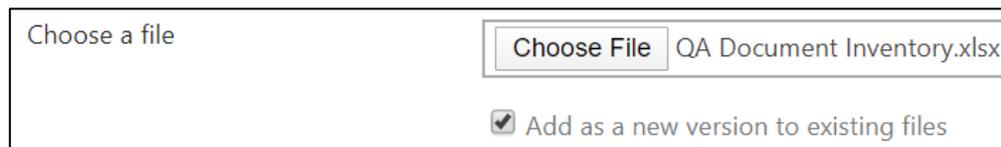
In the SharePoint Report Portal, access the **FILES** menu and choose the **New Folder** option to **create a separate location for your customized spreadsheets** (if this has not already been done).



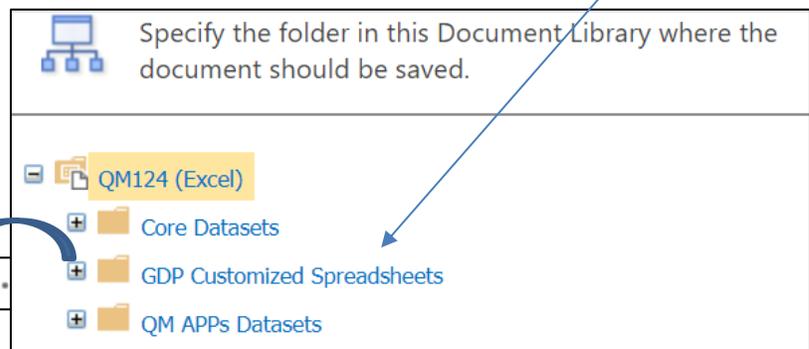
From the **FILES** menu then choose the **Upload Document** option to browse for your file or drag/drop it from your local destination to the SharePoint directory.



Use the **Choose File** option to locate your updated spreadsheet and then the **Choose Folder** option to identify the folder created for your customized spreadsheets.

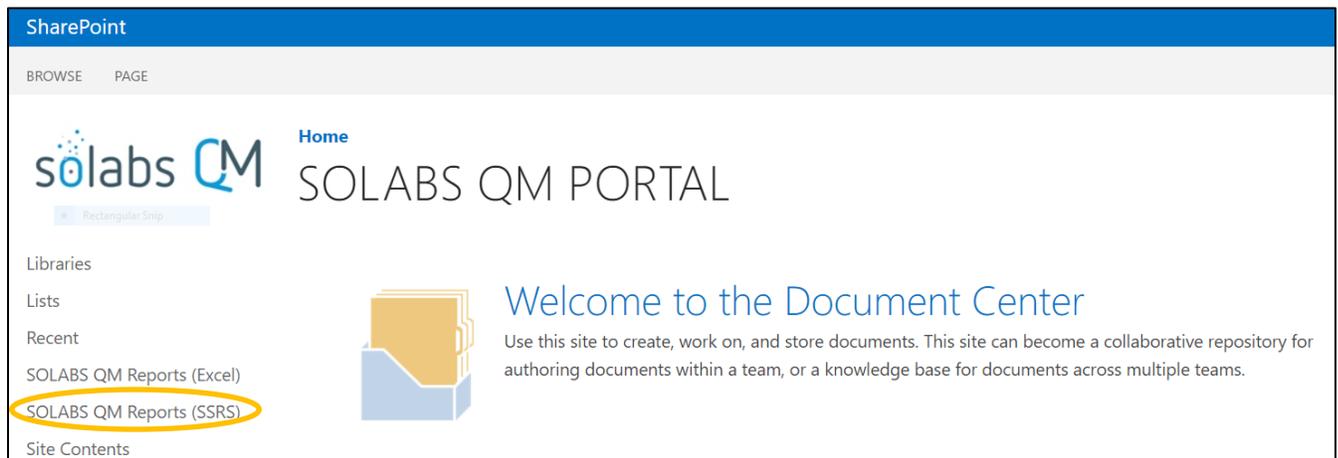


Enter any **Version Comments** you might like and then click **OK**. Your customized spreadsheet will now be updated on the same frequency as the core datasets.

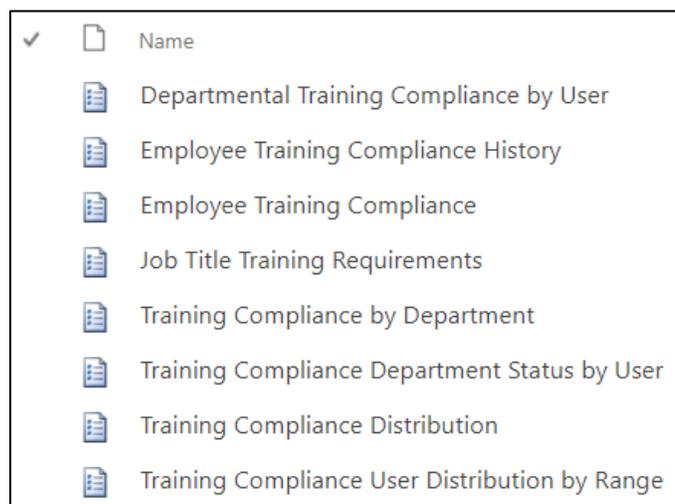


## SSRS Reports

There are a number of **SSRS Reports** available for each **SOLABS QM** Section – Training, Task, QM APPs and, starting with Version 10.8.1, Documents.



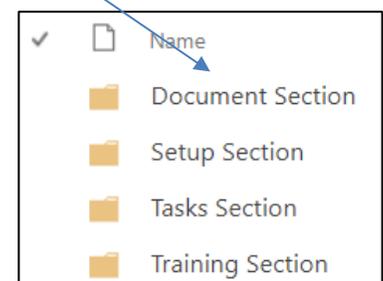
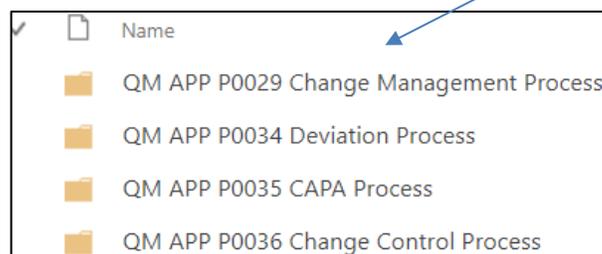
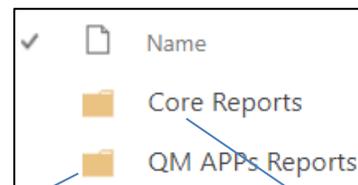
Here is an example list of reports available for the **TRAINING** Section:



Starting with QM10 version 10.8.1 there are new SSRS reports available for the **DOCUMENT** Section. Refer to the Knowledge Base document titled **SOLABS QM 10: SSRS Document Inventory Reports**.

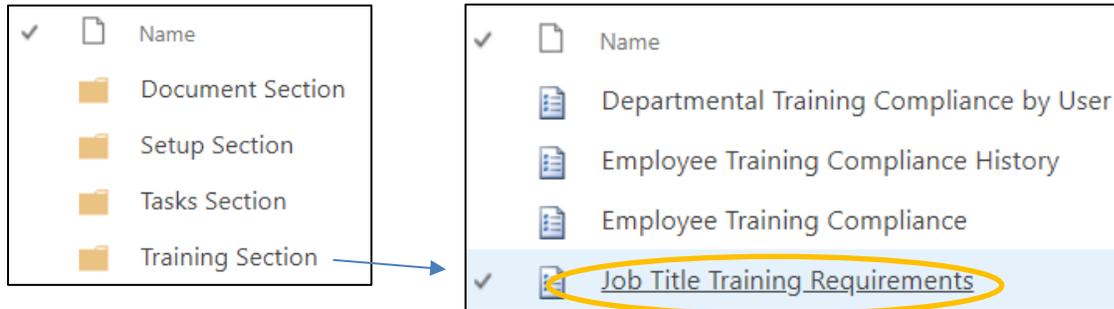
### Running an SSRS Report

- Click on **SOLABS QM Reports (SSRS)** under **Libraries**.
- Navigate to the applicable folder for the Core Reports or the QM APPs Reports that you would like to run.



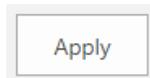
### Viewing an SSRS Report

To view an SSRS Report, click on the related folder and then double-click the report Name or the report icon in front of it.



Some reports have filter parameters that can be set and applied. Those are available on the right-hand side when the report opens.

After entering the desired Parameters, click the Apply button in the bottom right corner of the screen.



It is possible to configure the default settings for any parameter choices that include large lists of choices. Instructions start on the next page.

**Parameters**

Status

Date Initiated - Lower Bound  
   NULL

Date Initiated - Upper Bound  
   NULL

Date Closed - Lower Bound  
   NULL

Date Closed - Upper Bound  
   NULL

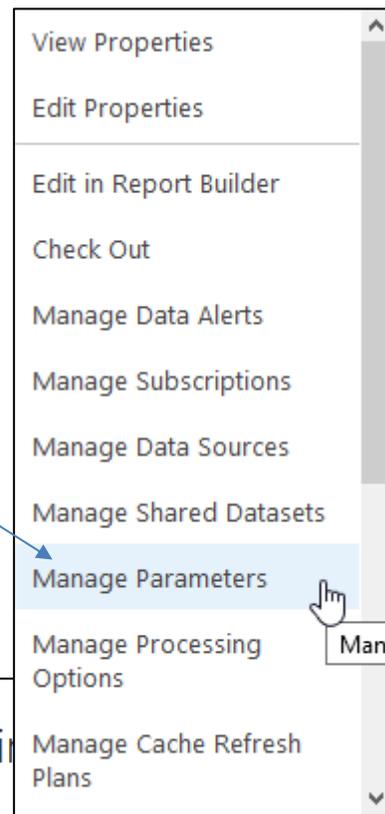
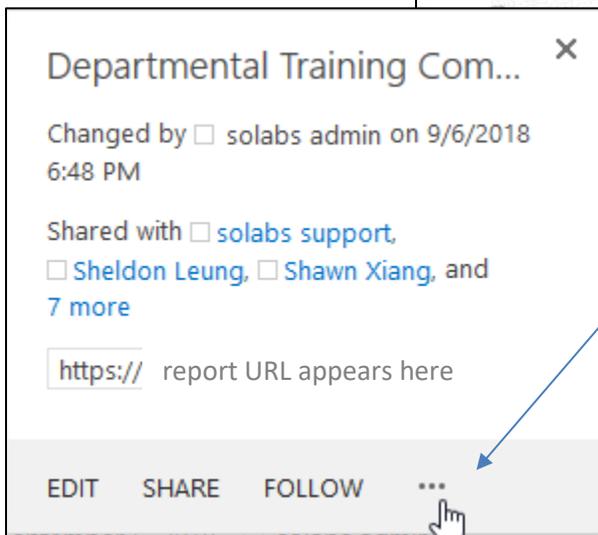
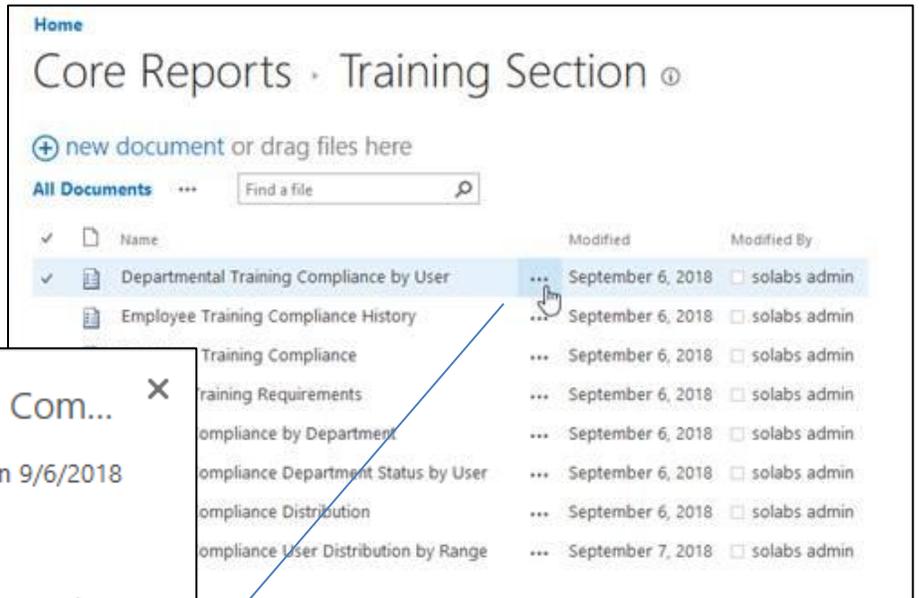
Choose Number of Days Opened

### Configuring Default Settings for SSRS Report Filter Parameters

After accessing the SOLABS Reports Portal, navigate to the folder that includes the report you would like to configure the parameters for.

Click on the **...** button to the right of the report you would like to configure the parameters for.

Once the Action menu appears, click on the **...** option at the bottom.

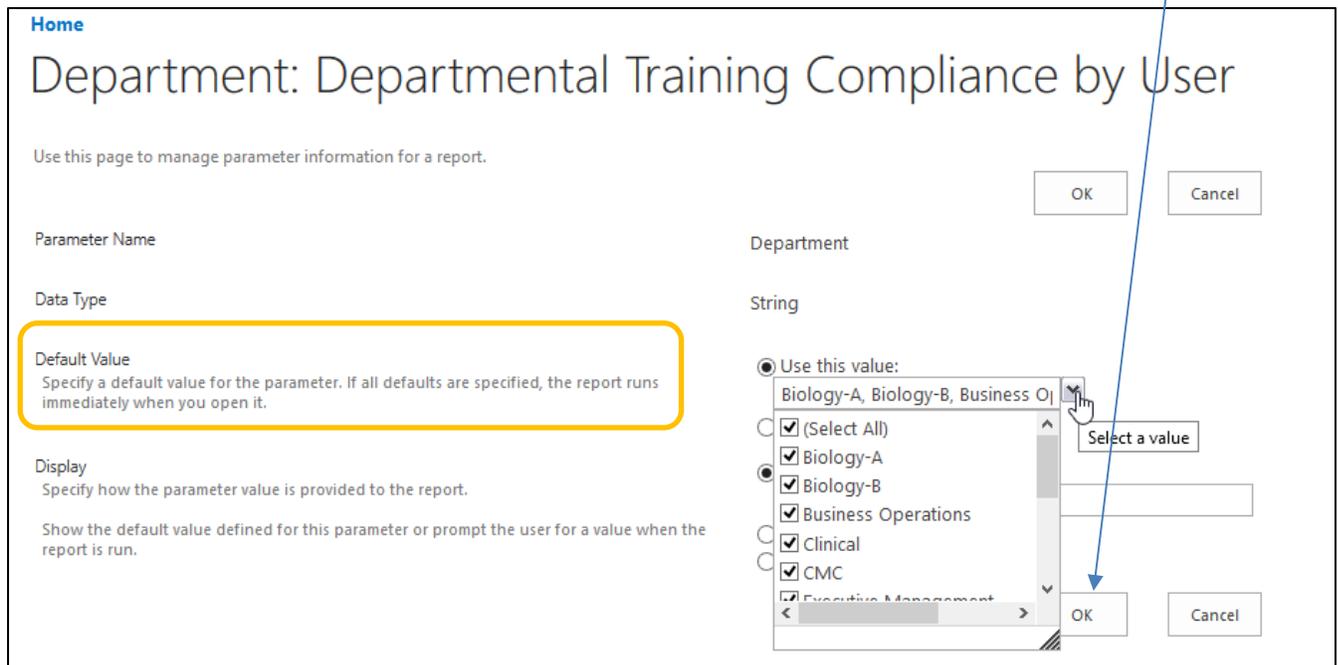


Click on the **Manage Parameters** option.

Click on the **Parameter Name** that you wish to configure. In this example, the Department list is being configured.

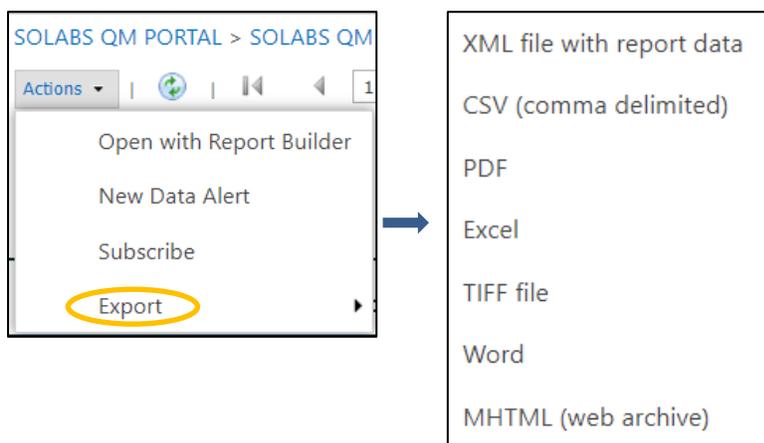


Select the desired value(s) in the **Default Values** section of the next display and then click on the **OK** button.



### Sharing an SSRS Report

- Access the SSRS Report that you would like to share.
- From the Actions menu, choose the Export option to choose a file format.
- Available formats may include XML, CSV, PDF, MHTML, Excel, TIFF, and Word (docx).

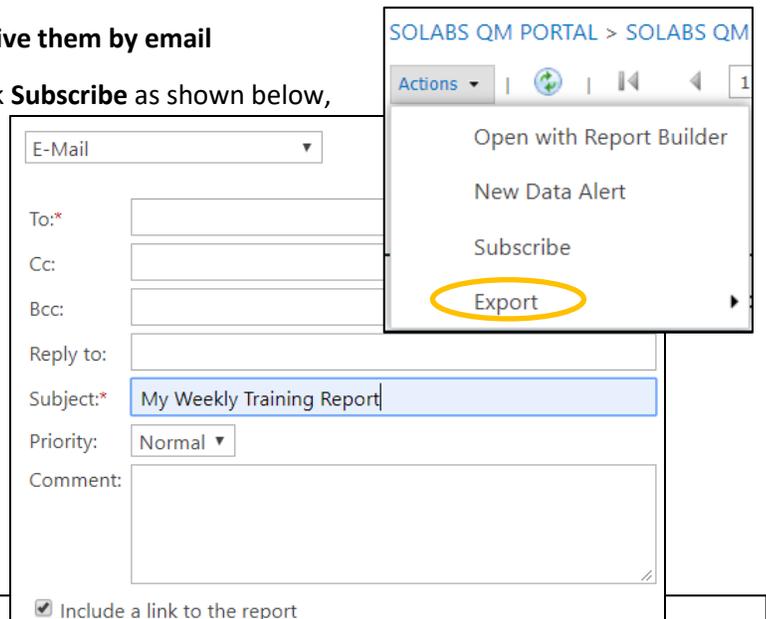
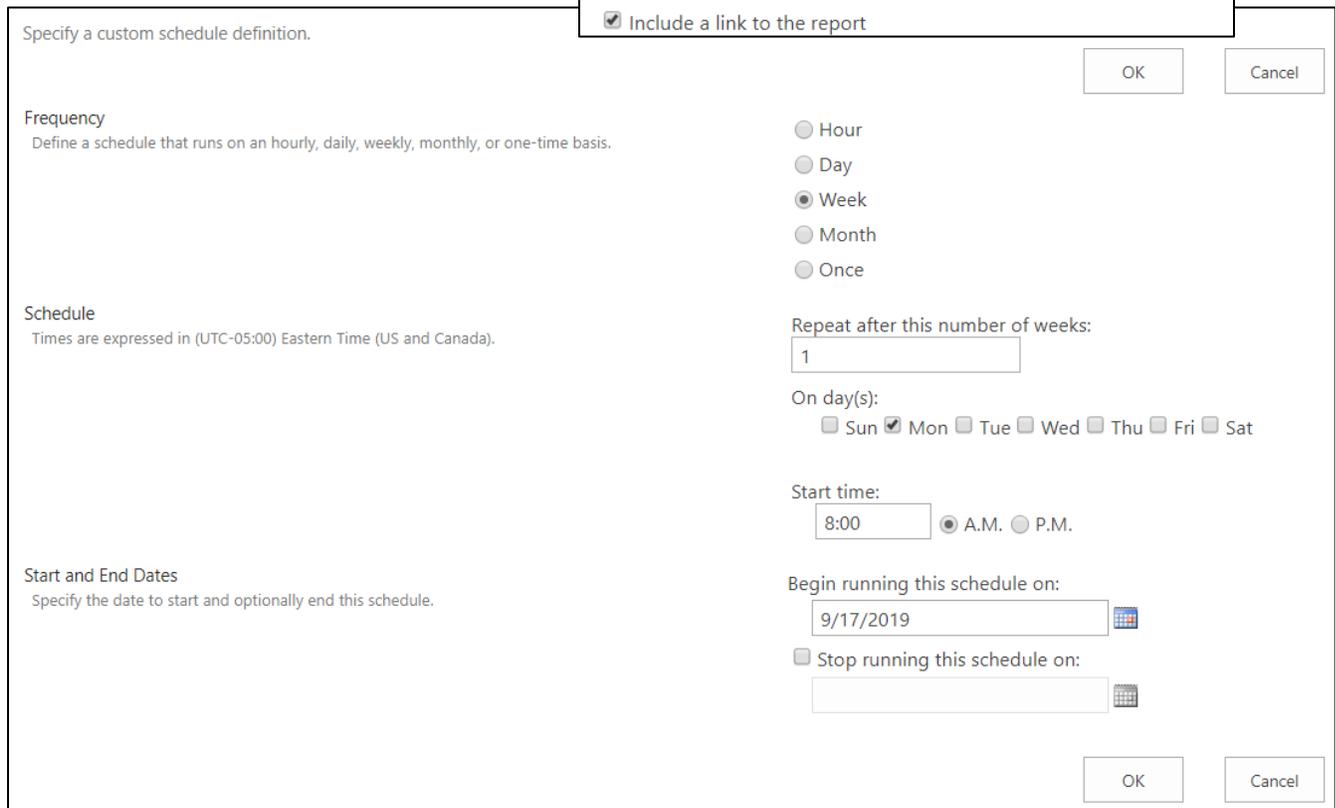


When the file downloads, open it and use the options related to the chosen file format to save the file to a location on your computer. You are then able to share as needed.

### Creating Subscriptions to SSRS Reports to receive them by email

To receive notifications from SSRS Reports, click **Subscribe** as shown below, and fill in the fields as required.

- Choose a **Delivery Extension of Email**
- Fill in the **Delivery Options**
  - **To** field and **Subject** fields are mandatory.
- Check **Include a link to the report**.
- In the **Delivery Event** section, choose a schedule for the Email Notifications. The default is 8:00 AM every Monday. Choose the **Configure** button to select other timing(s).

When all settings are complete, choose **OK** on the above screen and then **OK** on the main screen to save your Subscription to the report.

### Modifying or Adding an SSRS Report

Modification or addition of SSRS Reports will require assistance from SOLABS —please contact [Support@solabs.com](mailto:Support@solabs.com) for further details.