

SOLABS QM10 Reports

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Integrating SharePoint/SOLABS QM for Reporting

If your instance of **SOLABS QM10** 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.

		rch LOG	GOUT
sõlabs CM	PROCESS DOCUMENT TRAINING	Quick Access Menu	•



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: <u>https://[DOMAIN].solabs.com/sharepoint/</u>) into the **Address to SharePoint** field. Click **Submit** and then **Confirm** to save the change. Submit a support request if you need the URL.

Enable SOLABS QM Share	point Site	
Address to Sharepoint:		
	Submit	Cancel

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 QM10 **User Name** and **Password** and click **Sign in**.

- o User Name
 - = SOLABS QM10 Username (email address format starting with Release 10.8)
 - = SOLABS\ SOLABS Unique ID for earlier releases
- Password = Your regular SOLABS QM10 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 releases lower than 10.8.

Sign in	
https://trial.s	olabs.com
Username	gdixson@solabs.com
Password	
	Sign in Cancel

Setup > User > View	
User Account Details	
Username: nross	Language: English
Full Name: Nancy Ross	Alias: NR
Email Address:	Employee ID:
	SOLABS Unique ID: 5otgf92yi



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

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 Setting	gs
* Account Type:	
* Login Type:	
SOLABS Identity	•
* Sharepoint Access: N/A	N/A Limited View
	View Modify Full Control

The SharePoint Reporting Interface

SharePoint		
BROWSE PAGE		
solabs CM	Home SOLABS (QM PORTAL
Libraries Lists Recent SOLABS QM Reports (Excel) SOLABS QM Reports (SSRS) Site Contents		Welcome to the Document Center Use this site to create, work on, and store documents. This site can become a collaborative repository for authoring documents within a team, or a knowledge base for documents across multiple teams.

Report Types

- **Excel reports**: These reports are datasets that include SOLABS QM10 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.

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Excel Reports

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

× Document Expanded Document Metadata Training01 # × Document Expanded Document Workflow Training01 # ×ÌÌ Process Tasks Training01 # Process Values Training01 # Setup Role Inventory Training01 # × ×ìì Setup User Inventory Training01 # ×ìì Setup User Role Mapping Training01 # Task End User Inventory Training01 🗱 × Training Activities Inventory Training01 # Training End User Activities Training01 # ×ìì × Training End User Profiles Training01 # × Training Job Title Profiles Training01 #

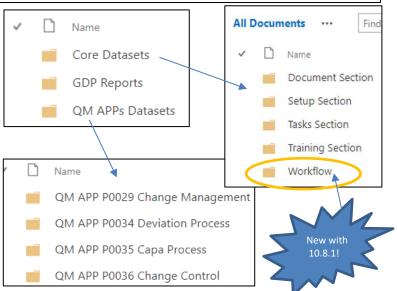
Running an Excel Report

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

SharePoint	
BROWSE PAGE	
solabs CM	Home SOLABS QM PORTAL
Libraries Lists Recent SOLABS QM Reports (Excel) SOLABS QM Reports (SSRS) Site Contents	Welcome to the Document Center Use this site to create, work on, and store documents. This site can become a collaborative repository for authoring documents within a team, or a knowledge base for documents across multiple teams.

You will then see folders for Core Datasets and QM APPs Datasets (if any QM Apps are deployed in your instance of SOLABS QM10). 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**).

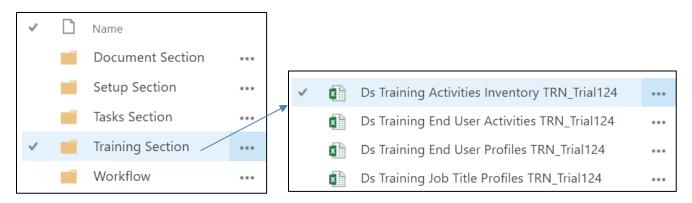
With Release 10.8.1 there is a Workflow Dataset that provides status information for all activities currently in progress for a user, in any section of QM10.





Viewing an Excel Report

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

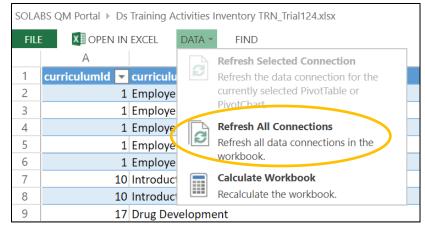


The spreadsheet will open for you to view. <u>NOTE</u>: There is <u>no need click on Open in Excel</u> to view the spreadsheet. In fact, this option will not work for hosted clients.

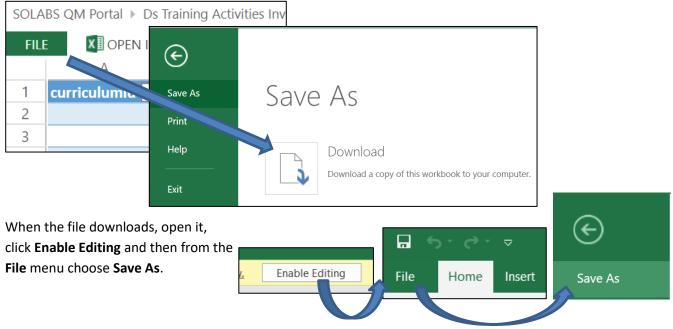
SOLA	SOLABS QM Portal 🕨 Ds Training Activities Inventory TRN_Trial124.xlsx				
FILE	FILE 🕅 OPEN IN EXCEL DATA - FIND				
	AB	С			
1	curriculumId 🔽 curriculumName	💌 curriculumStatus	curriculumDescription		
2	1 Employee Orientation	Open	These orientation sessions for ne		
3	1 Employee Orientation	Open	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 rel		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**.







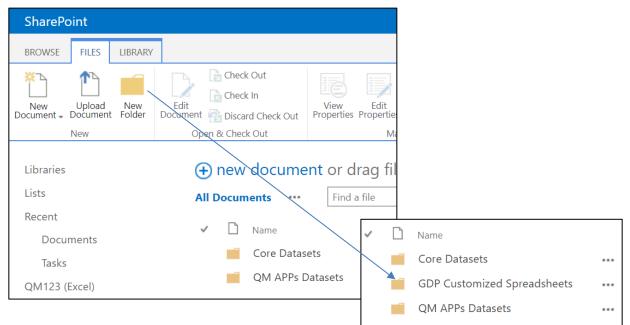
Then open the **File** menu and choose the **Download** option.

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.

SharePoint		
BROWSE FILES LIB	Add a document	:
	Choose a file	Choose File No file chosen
New Upload N Document - Document Fo		Add as a new version to existing files
New	Destination Folder	/ Choose Folder
	Version Comments	
		OK Cancel

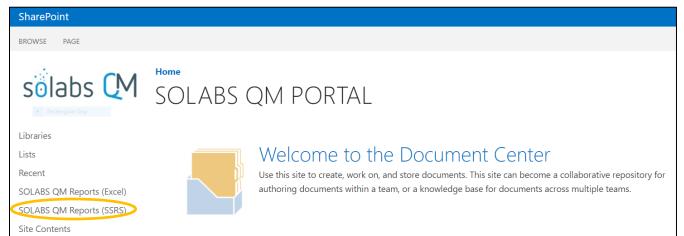
Use the **Choose File** option to locate your updated spreadsheet and then the **Choose Folder** option to identify the folder created for your customized spreadsheets.

Choose a file	Choose File QA Document Inventory.xlsx
	Add as a new version to existing files
Destination Folder	/GDP Customized Spreadsheets Choose Folder
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.	
	QM APPs Datasets



SSRS Reports

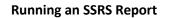
There are a number of SSRS Reports available for each SOLABS QM10 Section – Training, Task, QM APPs and, starting with Release 10.8.1, Documents.



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

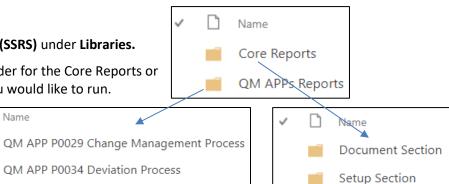
Starting with QM10 Release 10.8.1 there are new SSRS reports available for the DOCUMENT Section. Refer to the Knowledge Base document titled SOLABS QM10: SSRS Document Inventory Reports.

- D Name
 - E Departmental Training Compliance by User
 - Employee Training Compliance History e
 - **Employee Training Compliance** B
 - Job Title Training Requirements B
 - Training Compliance by Department e
 - E Training Compliance Department Status by User
 - Training Compliance Distribution B
 - E Training Compliance User Distribution by Range



- 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.

Name



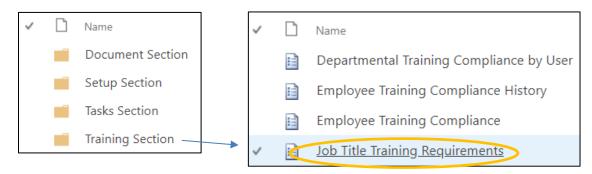


Tasks Section Training Section



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.

Apply

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

Status	
Opened 🔻	
Date Initiated - Lower Bound	
10/1/2018	
Date Initiated - Upper Bound	
Date Closed - Lower Bound	
Date Closed - Upper Bound	
Choose Number of Days Opened	
Opened for 30 days or less, Opened f	



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

	Home				
Click on the button to the right of the report you would like to configure the parameters	Core Reports → Training Section				
for.	All Documents ···· Find a file	Q			
Once the Action menu appears,	✓ D Name	Modified Modified By			
click on the 👘 option at the	Departmental Training Compliance by User				
bottom.	Employee Training Compliance History	September 6, 2018 🖸 solabs admin			
	e Training Compliance	September 6, 2018 🖂 solabs admin			
Departmental Training (🚥 September 6, 2018 🖂 solabs admin				
Compliance by Department		+++ September 6, 2018 📋 solabs admin			
Changed by solabs admin on	User \cdots September 6, 2018 🖂 solabs admin				
6:48 PM	Compliance Distribution	🚥 September 6, 2018 🗌 solabs admin			
Shared with solabs support, Sheldon Leung, Shawn Xiang, and 7 more					
	View Properties				
https://selecta.solabs.com/share	Edit Properties				
EDIT SHARE FOLLOW	Edit in Report Builder				
		Check Out			
Click on the Manage Parameters option.		Manage Data Alerts			
		Manage Subscriptions			
		Manage Data Sources			
		Manage Shared Datasets			
Click on the Deremotor Name that	Manage Parameters പ്പന				
Click on the Parameter Name that you wish to configure. In this example, the Department list is being configured.		Manage Processing Mana			

 Manage Parameters: Departmental Training Compliance by User

 Use this page to manage parameters used in this report.

 Prompt Order †
 Parameter Name
 Default Value

 1
 Department
 Biology-B, Business Operations, Clinical, CMC, Executive Management, Finance, Legal, Pharmaceutical Development, Pro



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

Home				
Department: Departmental Training Compliance by User				
Use this page to manage parameter info		0 1		
			OK Cancel	
Parameter Name		Department		
Data Type		String		
Default Value Specify a default value for the paramete immediately when you open it.	er. If all defaults are specified, the report runs	 Use this value: Biology-A, Biology-B, Busine Select All) 		
Display Specify how the parameter value is prov		Biology-A Biology-B Business Operations	Select a value	
Show the default value defined for this report is run.	parameter or prompt the user for a value when the	C Clinical C CMC	↓	
		<	> OK Cancel	

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).

SOLABS QM PORTAL > SOLABS QM	XML file with report data
Actions - 🚱 🛿 4 🛛 1	CSV (comma delimited)
Open with Report Builder	PDF
New Data Alert	
Subscribe	Excel
Export + :	TIFF file
	Word
	MHTML (web archive)

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.

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Creating Subscriptions to SSRS Reports to receive them by email			SOLABS QM PORTAL > SOLABS QM
To receive notifications from SSRS Reports, click Subscribe as shown below,			Actions • 🚱 🛛 4 🗍 1
and fill in the fields as required.	E-Mail	•	Open with Report Builder
Choose a Delivery Extension of Email	To:*		New Data Alert
 Fill in the Delivery Options To field and Subject fields are 	Cc:		Subscribe
mandatory.	Bcc:		Export +:
Check Include a link to the report.	Reply to:		
• In the Delivery Event section, choose a	Subject:*	My Weekly Training Report	
schedule for the Email Notifications.	Priority:	Normal T	
The default is 8:00 AM every Monday.	Comment:		
Choose the Configure button to select			
other timing(s).			
Specify a custom schedule definition.	🗹 Include	a link to the report	
			OK Cancel
Frequency		Hour	
Define a schedule that runs on an hourly, daily, weekly, monthly, or one-time l	basis.	 Day 	
		Week	
		On Month	
Schedule		Once	
Schedule Times are expressed in (UTC-05:00) Eastern Time (US and Canada).		Repeat after this n	umber of weeks:
		On day(s):	
			🗖 Tue 🗖 Wed 🗖 Thu 🗖 Fri 🗖 Sat
		Start time: 8:00) A.M. 🔘 P.M.
Start and End Dates Specify the date to start and optionally end this schedule.		Begin running this	
		9/17/2019	
		Stop running th	
			OK Cancel

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 <u>support@solabs.com</u> for further details.