



Quality Collaboration By Design

QCBD Report Engine User's Manual

Version 1.0.001

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Overview

QCBD Report Engine is an application which allows you to select and schedule reports to run automatically. Reports run unattended, according to a selected schedule. The reports are emailed to recipients that you select. All reports are output as Excel files which are then attached to the email.

All reports are based on queries run against the information contained in the QCBD database. QCBD Report Engine includes a large number of standard query based reports. In addition, any saved queries created by QCBD users which are saved as “public queries” are available to include as reports in QCBD Report Engine. Selecting which reports you want to schedule is easy and quick (see the section [Configuration and Set-up](#)).

There are two options for installing and running QCBD Report Engine. QCBD Report Engine is installed on a single computer, either running as a service (on the same server where the QCBD public files are stored) or as



a desktop application (running in the background) on a computer that has the QCBD client installed. There are different advantages to each method of running QCBD Report Engine (see the section [Appendix A - Installation](#)).

QCBD Report Engine is designed to work with your existing installation of QCBD and requires the purchase of a separate QCBD Report Engine module license.

NOTE: QCBD Report Engine can only be run by users that have been given QCBD System Supervisor rights.

Configuration and Set-up

Topics

- [Email Configure](#)
- [Report Setup](#)
- [Scheduling Reports](#)
- [Log – Report History](#)

To set up and configure reports you must install and run the QCBD Report Engine Console application (**QCBD_REPORTENGINE_CONSOLE.EXE**). The QCBD Report Engine Console application requires that you log on and only users with QCBD System Supervisor rights can run the console application.

Email Configure

The EMAIL CONFIGURE tab is where you tell the QCBD Report Engine how to send emails. Here, you define the parameters used by an SMTP mail server for outgoing mail.

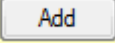
Screenshot of the Email Configure tab in the QCBD Report Engine Console application. The window has tabs for Schedule, Log, Report Setup, and Email Configure. The Email Configure tab is active. The form includes:

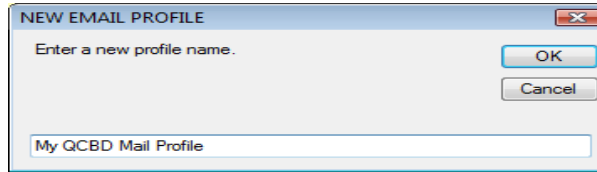
- Use this profile as the default send mail method: SMTP using gmail
- Available Email Profiles: Default SMTP mail (Add, Remove)
- Send Mail Method: Use SQL Server Database Mail, Use SMTP Mail
- Database Mail Profile: [Empty]
- SMTP Server: smtpout.secureserver.net
- SMTP Port: 25, Use Secure Socket Layer (SSL / TLS) with this connection
- SMTP Reply To: NoReply@mydomain.com
- SMTP Requires Authentication
- Email User Name: johnsmith1@camasoftware.com
- Email Password: [Masked]

Buttons: Save Changes, Test



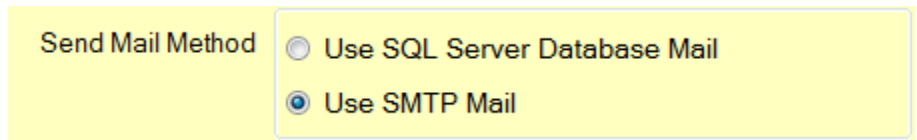
Begin by creating an email profile. An email profile provides all the required SMTP Server information needed to create and send **outgoing** mail messages.

Select the  command and enter a name to use for this mail profile



A dialog box titled "NEW EMAIL PROFILE" with a close button (X) in the top right corner. It contains a text input field with the text "My QCBD Mail Profile" and two buttons: "OK" and "Cancel". Above the input field is the label "Enter a new profile name."

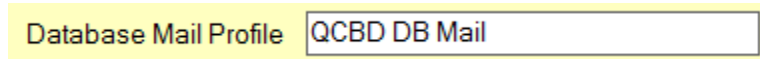
In QCBD Standard Edition, you can only select the **USE SMTP MAIL** option.



A yellow highlighted box containing the "Send Mail Method" section. It has two radio button options: "Use SQL Server Database Mail" (unselected) and "Use SMTP Mail" (selected).

QCBD Enterprise Edition users can also select the **USE SQL SERVER DATABASE MAIL** option.

With the **SQL SERVER DATABASE MAIL** option, you only have to enter the database mail profile name. No other settings are required.



A yellow highlighted box containing the "Database Mail Profile" section. It has a text input field with the value "QCBD DB Mail".

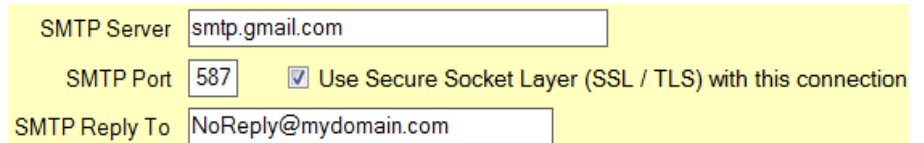
(See your SQL Server documentation for configuring SQL Server Database Mail.)

With the **USE SMTP MAIL** option selected, you must provide the SMTP Server name, Port and a reply to email address.



A yellow highlighted box containing SMTP configuration fields. "SMTP Server" is "smtpout.secureserver.net", "SMTP Port" is "25", and "SMTP Reply To" is "NoReply@mydomain.com". There is an unchecked checkbox for "Use Secure Socket Layer (SSL / TLS) with this connection".

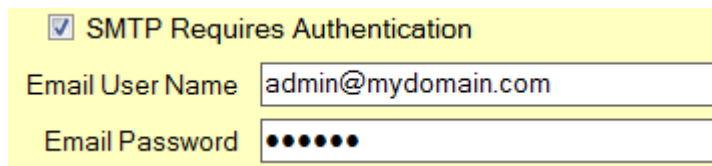
For **USE SMTP MAIL** users, if your outgoing mail SMTP server uses Secure Socket Layer, check this option and if necessary, assign the required SMTP Port.



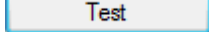
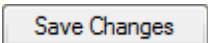
A yellow highlighted box containing SMTP configuration fields. "SMTP Server" is "smtp.gmail.com", "SMTP Port" is "587", and "SMTP Reply To" is "NoReply@mydomain.com". There is a checked checkbox for "Use Secure Socket Layer (SSL / TLS) with this connection".

(example settings used for gmail)

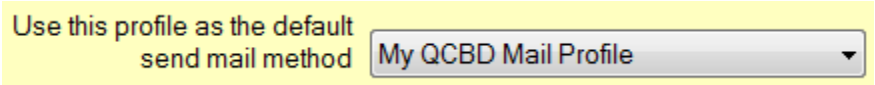
For **USE SMTP MAIL** users, if your outgoing mail SMTP server requires authentication, enter the appropriate credentials.



A yellow highlighted box containing authentication fields. It starts with a checked checkbox "SMTP Requires Authentication". Below are "Email User Name" (admin@mydomain.com) and "Email Password" (masked with dots).

After entering all the required information, you can send a test message by pressing the  command. After successfully testing your email settings, be sure to press the  command.

You can create one or more email profiles. If you create more than one email profile, you must designate one of the profiles to be the default profile. The default profile is the profile used by QCBD Report Engine when sending emails.



A yellow highlighted box containing the "Use this profile as the default send mail method" section. It has a dropdown menu currently showing "My QCBD Mail Profile".



Report Setup

The REPORT SETUP tab is where you tell the QCBD Report Engine the **what, who** and **when** for sending reports; **what** reports you want, **who** you want the reports sent to and **when** you want the reports to be run.

The screenshot shows the 'Report Setup' tab in the QCBD Report Engine. It features a 'Create New' button and a 'Report Name' dropdown menu. Below this is the 'Report Setup' section, which includes a 'QCBD Module' dropdown, a 'Report / Query Name' dropdown, and a large text area for 'Email Report to'. To the right of the 'Email Report to' area are two small icons and a 'Report for Site' checkbox. At the bottom of the 'Report Setup' section is a 'Reset All' button. To the right of the 'Email Report to' area are buttons for 'Save Changes', 'Test Query', and 'Test using Email'. At the bottom of the entire window is a 'Send Report Every' section with two dropdown menus.

Start by selecting the **CREATE NEW** command.

Step 1.

Select which **QCBD module** you want to report on.

All the QCBD modules will be listed here in alphabetical order.

The first selection, **All modules – Open Action Items** is a special selection and is explained below.

The screenshot shows the 'QCBD Module' dropdown menu. The list of modules is as follows:

- All Modules - Open Action Items
- CAPA - Audit
- CAPA - Process
- CAPA - Vendor
- Change Order
- Complaints
- Equipment Management
- Equipment Work Orders
- MasterList-AUDIT PLAN
- MasterList-DOCUMENT
- MasterList-FMEA (RISK ASSESSMENT)
- MasterList-PART
- MasterList-QUALITY PLAN
- Nonconforming Material
- Process Deviation
- Preventive Action
- Supplier Management
- Training Management



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Step 2.

Select the **Report or Query Name** that identifies the module data that will appear in the report.

The first 4 reports listed (starting with "All") are system defined. After these, all the **public saved queries** that have been defined for this module will be listed.

QCBD Module	CAPA - Process
Report / Query Name	<ul style="list-style-type: none"> All - This Month All - Last Month All - YTD All - past 12 months Closed Open Open more than 30 days

When you define a saved query in QCBD as "public", it becomes an available report in QCBD Report Engine and will appear in this list.

Step 3.

Select who you want the report sent to.

There are two ways to select users; by name and by role.

When selecting users by name, you select individual QCBD users from a list of available users.

These users must have read and report privileges for the selected report module.

Email Report to	<ul style="list-style-type: none"> %ASSIGNED TO% %INITIATOR% guest1@CAMASoftware.com guest2@CAMASoftware.com
-----------------	--

Available Choices	
EmailAddress	QCBD User
%ASSIGNED TO%	%ASSIGNED TO%
%INITIATOR%	%INITIATOR%
guest3@CAMASoftware.com	3, Guest
jdoe@camasoftware.com	Doe, John
JS@CAMASOFTWARE.COM	Smithy, Joseph
jsmith@camasoftware.com	Smith, Jane

When you select users by role, you select from the special role names listed at the top of the available choices list.

Available Choices	
EmailAddress	QCBD User
%ASSIGNED TO%	%ASSIGNED TO%
%INITIATOR%	%INITIATOR%
guest3@CAMASoftware.com	3, Guest
jdoe@camasoftware.com	Doe, John
JS@CAMASOFTWARE.COM	Smithy, Joseph
jsmith@camasoftware.com	Smith, Jane

The roles that appear will vary depending on the selected module.



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Role	Explanation
%APPROVER%	Selecting %Approver% will substitute the names (email addresses) of actual approvers for any records that match the report or query criteria. %Approver% appears as a choice for any module with an approval tab (CAPAs, Complaints, Change Orders, etc.).
%ASSIGNED TO%	Selecting %Assigned To% will substitute the name (email address) of QCBD users whose name appears in the 'assigned to' field. %Assigned To% appears as a choice for modules that have an 'assigned to' field (CAPAs, Complaints, and Nonconformance's).
%CHANGE COORDINATOR%	Selecting %Change Coordinator% will substitute the name (email address) of QCBD users who have been assigned as a "change coordinator" on the Masterlist Change Order form.
%EMPLOYEE%	%Employee% is used with training module reports and will substitute the name (email address) of the employee.
%INITIATOR%	Selecting %Initiator% will substitute the name (email address) of QCBD users whose name appears in the 'initiator' field. %Initiator% appears as a choice for modules that have an 'initiator' field (CAPAs, Complaints, and Nonconformance's, etc.).
%REPORTS TO%	%Reports To% is used with training module reports and will substitute the name (email address) of employees whose name appears in the 'reports to' field.

Reports that use roles in the email address will be emailed directly to the QCBD user represented by that role. Roles permit you send reports directly to relevant users without having to select individual users by name.

Step 4.

Select when you want the report be sent. You select the frequency (how often) the report is emailed to the targeted recipients.

Send Report Every

Week

First Day



The "Escalation" reports (found under the module selection "All modules – Open Action Items") have a special frequency selection.

These reports are sent to approvers who have not responded to their initial request for approval (they have neither approved nor rejected, their approval is still **waiting**).

The escalation report servers to notify the approver that action is required. You can select an option to send notification repeatedly until the action is either approved or rejected.

All Modules - Open Action Items

- Approver
- Approver - Escalation CAPA
- Approver - Escalation Change Orders
- Approver - Escalation Complaints
- Approver - Escalation Nonconformance
- Approver - Escalation Process Deviation
- Approver - Escalation Supplier
- Assigned to
- Change Coordinator

Notify at 24 hrs Yes No Repeat Notification

[Reset All](#)

RESET ALL Command. The Reset All command will rebuild the queries for all your reports. Use this command whenever you make changes to your stored queries in QCBD.

Scheduling Reports

The SCHEDULE tab allows you to view when your reports were last run and when they are schedule to run next. You can change the next scheduled run date or run the report immediately.

Schedule | Log | Report Setup | Email Configure

Refresh

Report Name	Std Run Time	Last Run On	Next Sched Run Date
▶ Complaints - Issued yesterday (All Sites)	00:00	04/29/11	04/30/11

EDIT WINDOW

Standard Run Time Save

Next Scheduled Run Date Run Now



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The STANDARD RUN TIME is the time of day when the report is schedule to run. It is based on a 24 hour clock (01:00 is 1:00 AM and 24:00 is 12:00 AM). All reports run according to the day/time on the server where the SQL Server resides. This time may not be the same as your local time. It is recommended that you run the reports during off hours when there are fewer users and less demand on server, network and mail resources.

You can change the scheduled run time or the next scheduled run date by selecting a date. Be sure to select the SAVE command.

You can run a report immediately using the RUN NOW command. Once the report has completed, it will automatically be reschedule to run according to the frequency interval you selected for that report (see Step 4 in Report Setup above).

Log – Report History

The LOG tab displays a history of all reports run during the last 60 days.

The screenshot shows the QCBD Report Engine Console window with the 'Log' tab selected. The window contains a table with the following columns: Report Name, Run Date, Run Time, and Email Addressee. The table lists various reports such as 'All Modules - Open Action Items - Approver - Escalati...', 'CAPA - Audit - All - Last Month (All Sites)', and 'CAPA - Audit - All - past 12 months (All Sites)'. The 'Run Date' for all entries is 9/25/2009, and the 'Run Time' is either 8:28 PM or 8:31 PM. The 'Email Addressee' column contains email addresses like 'guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...'. There are 'Refresh' and 'Export to Excel' buttons at the top right of the table area, and a 'Clear Log' button at the bottom right.

Report Name	Run Date	Run Time	Email Addressee
All Modules - Open Action Items - Approver - Escalati...	9/25/2009	8:28 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
All Modules - Open Action Items - Approver - Escalati...	9/25/2009	8:28 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
All Modules - Open Action Items - Approver - Escalati...	9/25/2009	8:28 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
All Modules - Open Action Items - Approver - Escalati...	9/25/2009	8:28 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
All Modules - Open Action Items - Approver - Escalati...	9/25/2009	8:28 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
All Modules - Open Action Items - Approver (All Sites)	9/25/2009	8:28 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
All Modules - Open Action Items - Assigned to (for T...	9/25/2009	8:31 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
All Modules - Open Action Items - Change Coordinat...	9/25/2009	8:28 PM	
All Modules - Open Action Items - Gap (All Sites)	9/25/2009	8:28 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
All Modules - Open Action Items - Overdue (All Sites)	9/25/2009	8:28 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
All Modules - Open Action Items - Owner (All Sites)	9/25/2009	8:28 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...
CAPA - Audit - All - Last Month (All Sites)	9/25/2009	8:28 PM	
CAPA - Audit - All - past 12 months (All Sites)	9/25/2009	8:29 PM	guest1@CAMASoftware.com;jsmith@camasoftware.com;carl-kern@co...

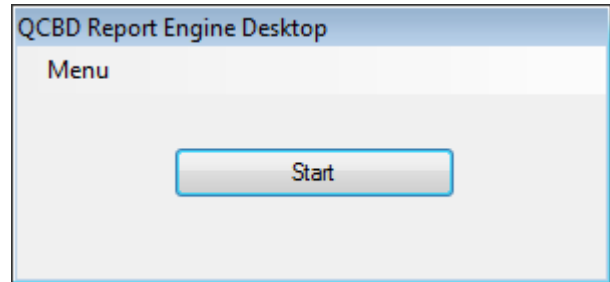
The log tells you when a report ran and who it was emailed to. If there are errors attempting to run a report, the error will be listed in the Error Message column.

Log entries for reports that were run longer than 60 days ago are automatically deleted.



Option 1 - Report Engine Desktop

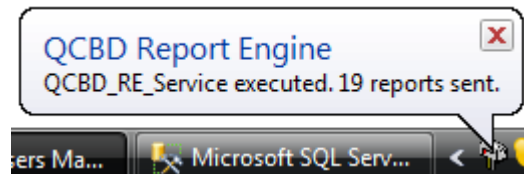
Once the QCBD Report Engine Desktop application has been installed, all you need to do is start the application running.



Once you press START, the Desktop application will begin running silently in the background. An icon is placed in the notification area of the task bar.

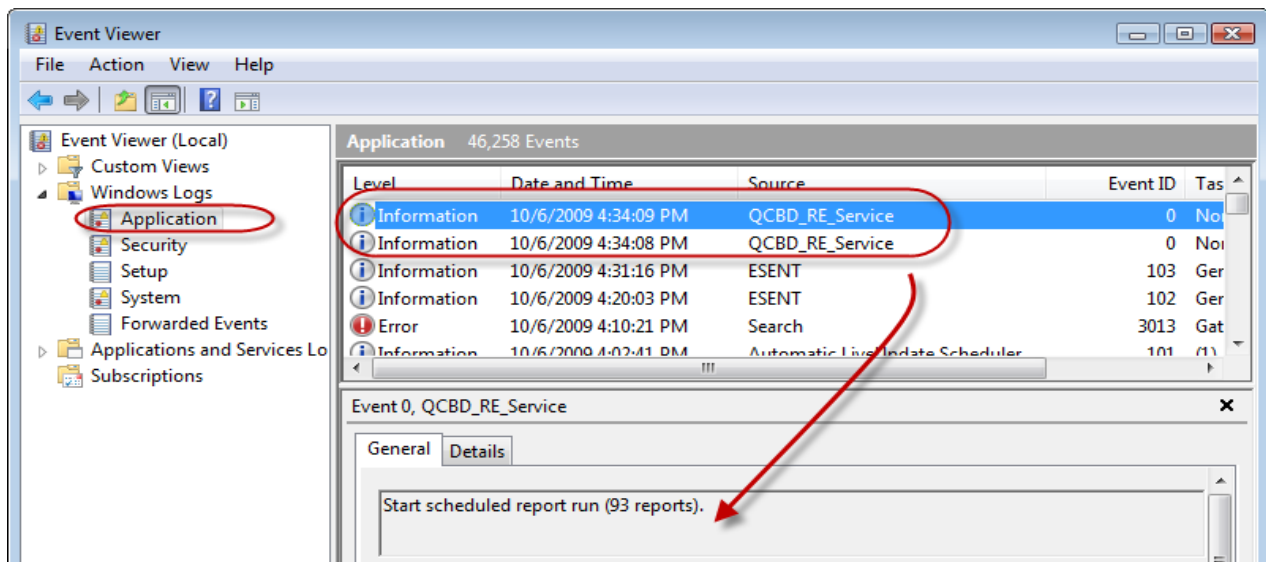


While the application is running, you can view its status by holding the mouse over the icon.



Option 2 - Report Engine Service

Once the QCBD Report Engine Service application has been installed and started, you can view its status by opening the Windows Event Viewer console.





Look for entries where the 'source' is QCBD_RE_SERVICE.

Level	Date and Time	Source	Event ID	Tas
Information	10/6/2009 4:36:44 PM	QCBD_RE_Service	0	Noi
Error	10/6/2009 4:35:41 PM	QCBD_RE_Service	0	Noi
Error	10/6/2009 4:34:52 PM	QCBD_RE_Service	0	Noi
Information	10/6/2009 4:34:09 PM	QCBD_RE_Service	0	Noi
Information	10/6/2009 4:34:08 PM	QCBD_RE_Service	0	Noi
Information	10/6/2009 4:31:16 PM	ESSENT	103	Ger

Normal processing events are logged at the information level.

The screenshot shows a Windows Event Viewer window. The event log is filtered to show events from the source 'QCBD_RE_Service'. The first event is an 'Information' level event with the message 'QCBD_RE_Service executed. 93 reports sent.' The event details pane is open, showing the 'General' tab with the same message.

Problems or errors are logged at the error level.

The screenshot shows a Windows Event Viewer window. The event log is filtered to show events from the source 'QCBD_RE_Service'. The first event is an 'Error' level event with the message 'SMTP send mail error: [HOST smtp.west.cox.net] Insufficient system storage. The server response was: 4.1.0 Your connection to our email server has delivered the maximum number of messages per connection, and has therefore been closed. However, you may continue the'. The event details pane is open, showing the 'General' tab with the same message.

Appendix A - Installation

Topics

- [First Time Installation](#)
- [Installing the RE Console Application](#)
- [Installing the RE Desktop Application](#)
- [Installing the RE Service Application](#)

Installing QCBD Report Engine is simple and fast.

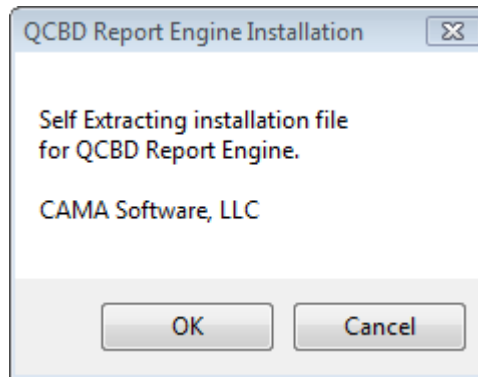
NOTE: You must be logged on to Windows with LOCAL ADMIN rights in order to perform any of the installation steps described in this section.



First Time Installation

The software is installed from a self extracting file provided by CAMA Software.

Download the QCBD Report Engine installation file from the CAMA Software website (contact CAMA Software).



During the installation, you are asked to log on.

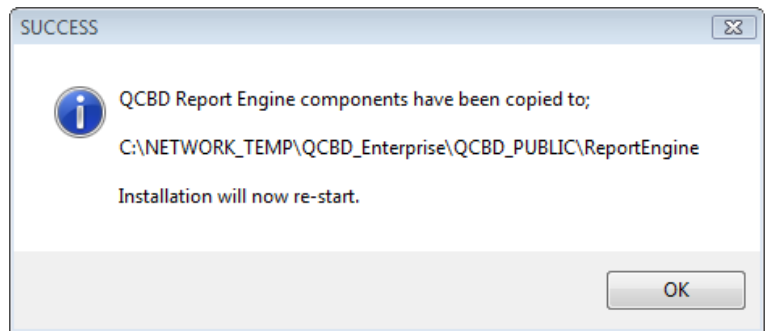
Log on using a QCBD user account with QCBD System Administrator rights.



NOTE: QCBD Report Engine can only be installed by users with QCBD System Supervisor rights.

The installation is fast. A new folder will be created in the QCBD Public folder on your network.

All the required files will be copied to this folder.

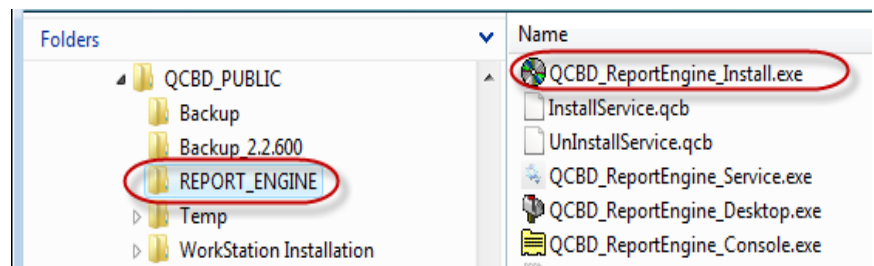


Installing the RE Console Application

The QCBD Report Engine Console application is used by system administrators to configure and monitor the performance of the QCBD Report Engine (see [Configuration and Set-up](#) for how to use the Console application).

To start the installation, go to the REPORT_ENGINE folder in the QCBD Public folder on the network.

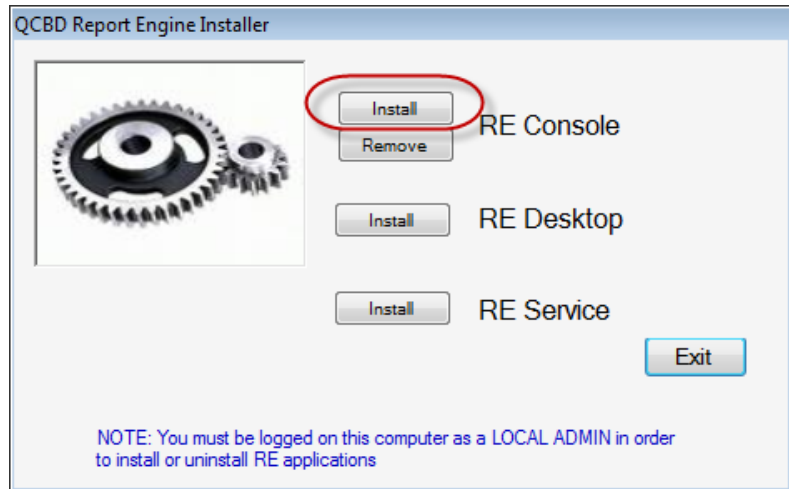
Double-click the **QCBD_REPORTENGINE_INSTALL.EXE** file.





Select the INSTALL command for RE Console.

The consoled application will be copied to you local workstation and a shortcut will appear in you QCBD start menu.



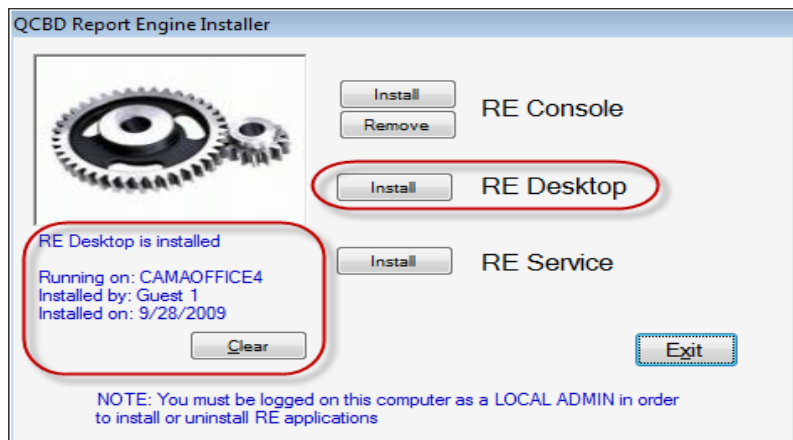
Installing the RE Desktop Application

The QCBD Report Engine Desktop application is designed to be installed on a single workstation. It is typically installed on the QCBD System Supervisor's computer.

The Desktop application will run silently in the background and runs reports at their scheduled time. Windows must be running in order for reports to run.

The QCBD Report Engine Desktop application should only be installed on one computer. If you install the Desktop application on more than one computer, only the last installation will be active and any prior installation will not run.

NOTE: QCBD reports can be run using either the Desktop application or the Service application *but not both*.



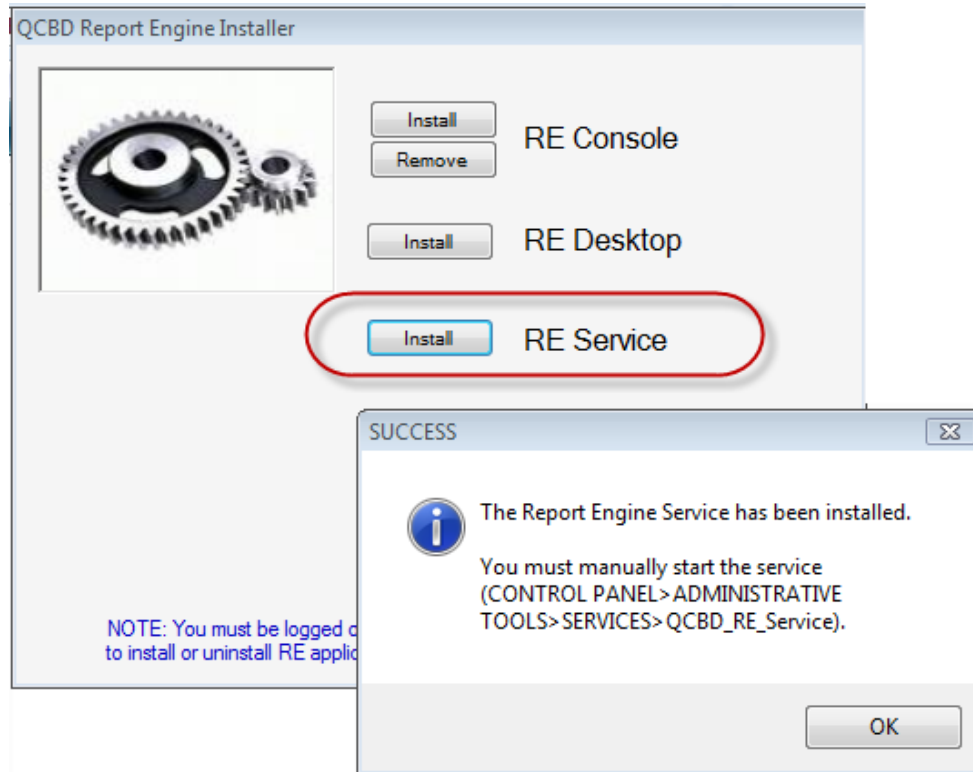
Installing the RE Service Application

The QCBD Report Engine Service application is designed to be installed as a Windows service application running on the server where QCBD is running. For the Standard edition, this is the server where the QCBD network files are located. For the Enterprise edition, this is the server where the SQL Server is installed.

The Service application will run silently in the background and runs reports at their scheduled time.

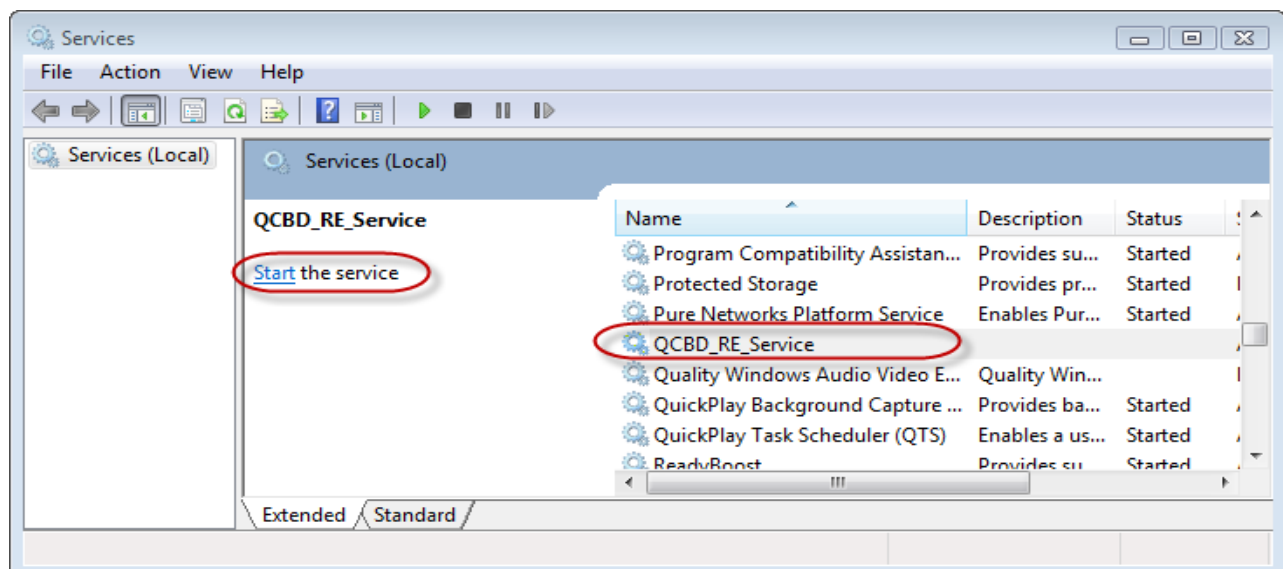


NOTE: QCBD reports can be run using either the Service application or the Desktop application *but not both*.



Once the installation is complete, you must manually start the service for the first time. From the server where the Service application has been installed, use the Control Panel and open Administrative Tools. Select Services to open the Windows Services MMC.

Scroll down and select **QCBD_RE_Service** and then select **Start the service**.





Appendix B – Available Reports

The QCBD Report Engine includes a variety of useful reports for managing your quality data. In addition, any saved queries that you create and save as **public** query in the QCBD Report screen, will be available as a report selection.

This appendix list the reports that are included as part of the QCBD Report Engine application.

All reports are organized by module.

MODULE	QUERY	COMMENT
All Modules – Open Action Items	Approver Approver - Escalation CAPA Approver - Escalation Change Orders Approver - Escalation Complaints Approver - Escalation Nonconformance Approver - Escalation Process Deviation Approver - Escalation Supplier Assigned to Change Coordinator Gap Overdue Owner	All the reports in this section correspond to the actions items found in the Dashboard View queries. ‘Escalation’ specifically refers to notification to approvers who have not responded to the original request for approval and for which you want to send repeated notification. ‘Assigned to’ refers to the assigned to field in then Complaints, CAPA and NCMR modules. ‘Change Coordinator’ refers to Change Orders where the Advanced Change control has been turned on. ‘Gap’ and ‘Overdue’ are training status reports. ‘Owner’ refers specifically to to the inititor of either an open Process Deviation, an open Preventive Action or a pending Change Order.
CAPA – Audit	All - This Month All - Last Month All – YTD All - past 12 months Closed External CAR External CAR – Open Internal CAR Internal CAR – Open Open Open for more than 30 days	



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CAPA – Process	All - This Month All - Last Month All – YTD All - past 12 months Closed Open Open for more than 30 days	
CAPA – Vendor	All - This Month All - Last Month All – YTD All - past 12 months Closed Open Open for more than 30 days	
Change Order	APPROVED Changes PENDING Changes RELEASED Changes ROUTING Changes	Change Orders at various stages of their life-cycle.
Complaints	All - This Month All - Last Month All – YTD All - past 12 months Closed Open Open for more than 30 days	
Equipment Management	CAL due in next 30 days CAL Overdue PM due in next 30 days PM Overdue Requires CAL Requires PM	
Equipment Work Orders	Open CAL Work Orders Open CAL Work Orders - Past Due Open PM Work Orders Open PM Work Orders - Past Due	These reports are specific to open work orders and useful for tracking purposes.
Nonconforming Material	All - This Month All - Last Month All – YTD All - past 12 months Closed	



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	Location=Final Location=In-Process Location=Receiving Open Open for more than 30 days	
Process Deviation	All - This Month All - Last Month All – YTD All - past 12 months Closed (Expired) Open Open – Approved Open: Expires within 10 days Open: Past Exp Date	
Preventive Action	All - This Month All - Last Month All – YTD All - past 12 months Closed Open Open for more than 30 days	
Supplier Management	Approved Supplier List Evaluation Overdue Evaluations due within 30 days Level I Suppliers Level II Suppliers Level III Suppliers	
Training Management	Gaps Training Overdue Training Due with 30 days	