

6) Customised report styles

In previous videos we have used the built-in system report styles to look at the results of our modelling. These system report styles are generic so that they can be used in all kinds of different ways.

In this video we will customise a report style, so that it can meet the exact requirements of the job we are trying to do. You can choose which numbers you want to see, how those numbers should be described, and how they should be formatted.

To create a custom report style, click the orange book in the “Edit report/chart styles” section.

We are going to take the most popular system report style, which is PastAndFutureWithRecurringDemand, and customise it to our own requirements.

Let’s start by taking a copy of this system report style, and giving it a name.

Now click the “Configure report style” icon beside our copy to start editing it.

Now we have complete control over this report style. We can edit a row by clicking the Edit icon beside it. So if we want to replace the past activity rate with our own activity plan, I can click Edit beside that item, and replace it with the number I want.

I can change the description – in this case, the activity plan we have loaded up is our core capacity so I’ll change the label to say so. There are various formatting options here too. And when I’ve finished, I scroll down and click Next.

If I want to insert a new row, I can use the dropdown control at the top. For instance let’s say I want to insert a Value. I can choose what to insert, for instance “Extra demand in future period” which is an assumption we can upload in our data files. I’ll put this in in grey, with no decimal places, and insert it as a new row number 20. And click Next.

There are also icons to rearrange the row ordering, and delete rows completely.

Now let’s look at our handiwork. We can choose a report. Click the report style to change it. And our new report style is there in the first drop-down. Click Next.

And now if we open the report, our new core capacity row is there at the top, and the extra demand in future period row is further down in grey.

There are a few things to watch out for when customising report styles.

- One is not to delete so many rows that the numbers can’t tell the story properly. It’s reassuring when there are enough numbers on the screen to substantiate the results and provide some cross checks.

- Another is to avoid comparing too many things, because that can lead to confusion. For instance, you could compare the selected activity scenario against lots of different benchmarks, but if different comparisons go in different directions there is the risk that people may get confused about whether things are getting better or worse.
- Finally, although it is fine to customise the labels to suit the way you describe things where you are, be aware that changing the activity scenario might change the context. For instance, a moment ago we changed the label in the first row to “Activity based on core capacity”. Which is fine, if that is the value of future activity that we have uploaded. But if later on we upload a different activity scenario then this label will be misleading.

So if the system report styles aren't quite hitting the spot for you, then customising them is definitely the way to go. Then you can get exactly the numbers you want out of Gooroo Planner, presented in the way you want them.