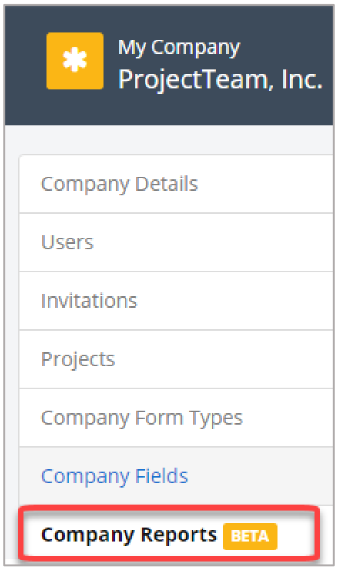
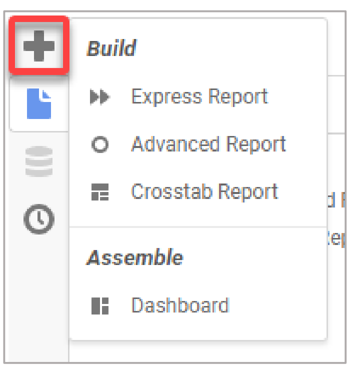
Company Reports

1. From **My Company**, click **Company Reports** on the left hand navigation.



2. Reports and Dashboards will load. From the top navigation of the Reports area, click the **Plus** icon button.



3. Select the appropriate report type under **Build**.

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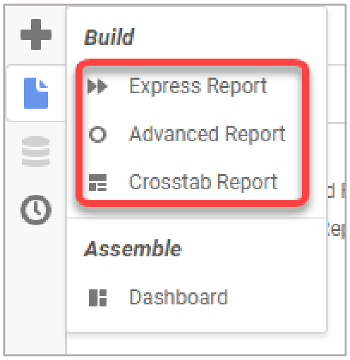
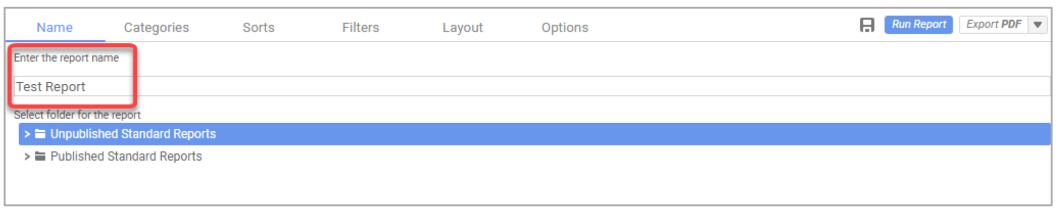
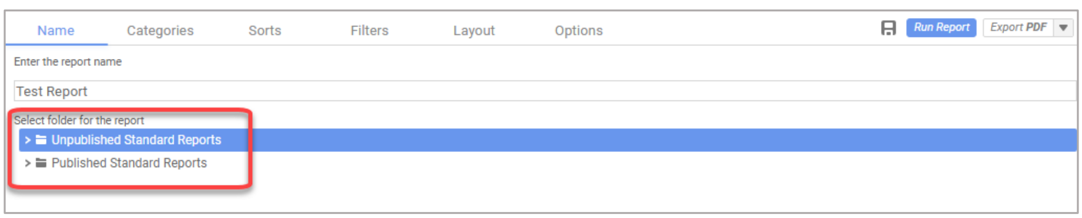


4. **Express Report** – Quickly create tabular reports with essential operations like sorting, filtering and calculations. Easily format and summarize data.

    a. **Enter the report name** in the blank field.

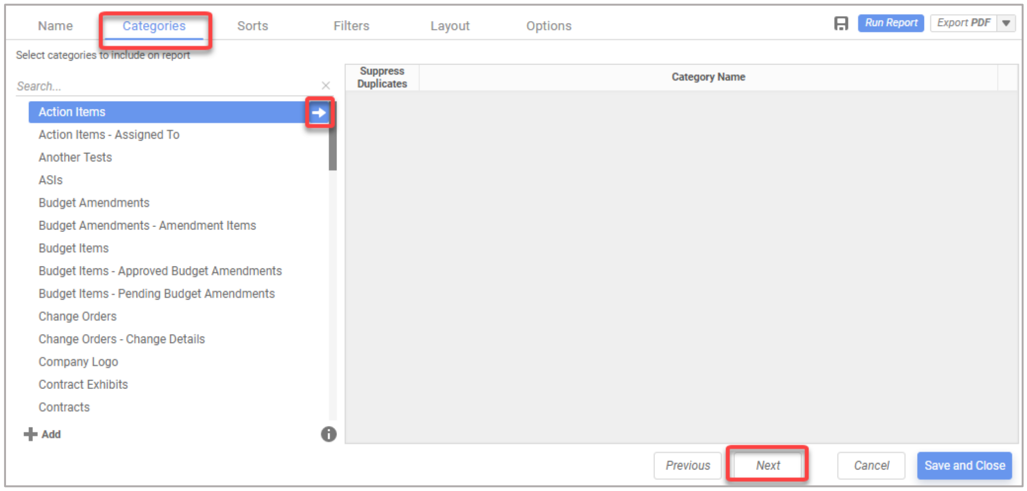


    b. Select appropriate folder to create report within.



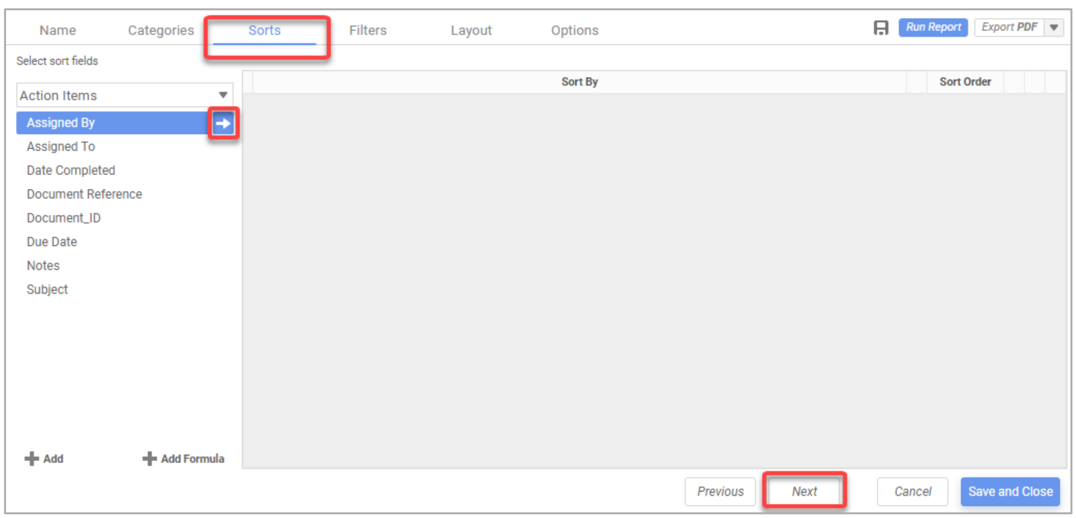
    Note: It is recommended to create the report in the **Unpublished** folder first. Once a report has been created it can be moved to the **Published** folder. Reports in the Published folder will display in the reports within a project under My Company Access\Standard Reports.

    c. Click the **Next** button or **Categories**, select form types to be included in report. Click **plus** icon at the bottom of the list or the **arrow** icon next to appropriate form type to add to the report.



Note: Multiple form types may be added to a Company Report but any project custom from types cannot be added to Cross Project Reports.

d. Click the **Next** button or **Sorts**, Click **plus** icon at the bottom of the list or the **arrow** icon next to appropriate field type to add to the report.



Note: Sorts may be applied to the field types. With the Field Type selected, choose the appropriate sort to apply to the report.

e. Click the **Next** button or **Filters**, select form type from the drop down and appropriate field. Click **plus** icon at the bottom of the list or the **arrow** icon next to appropriate field type to add to the report.

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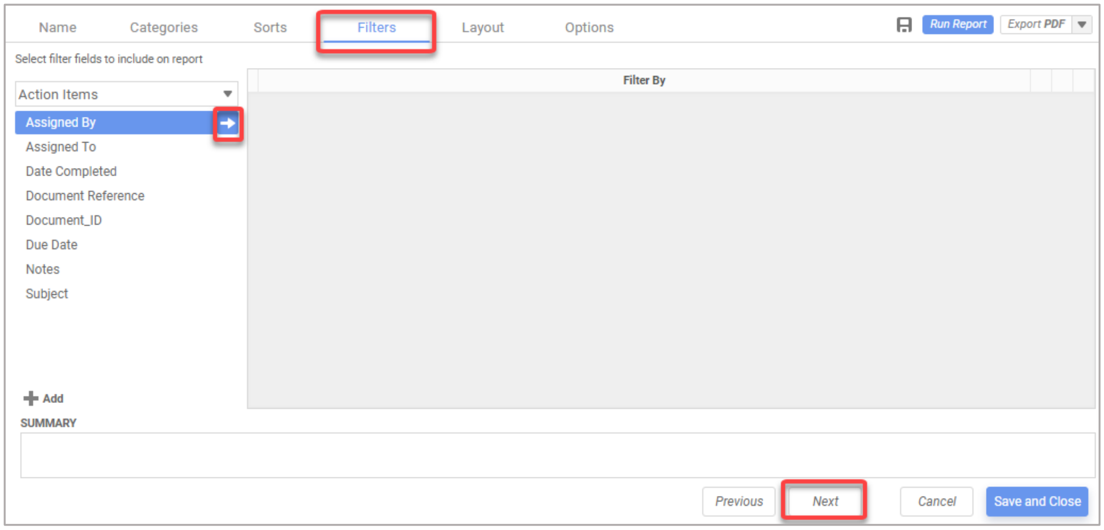
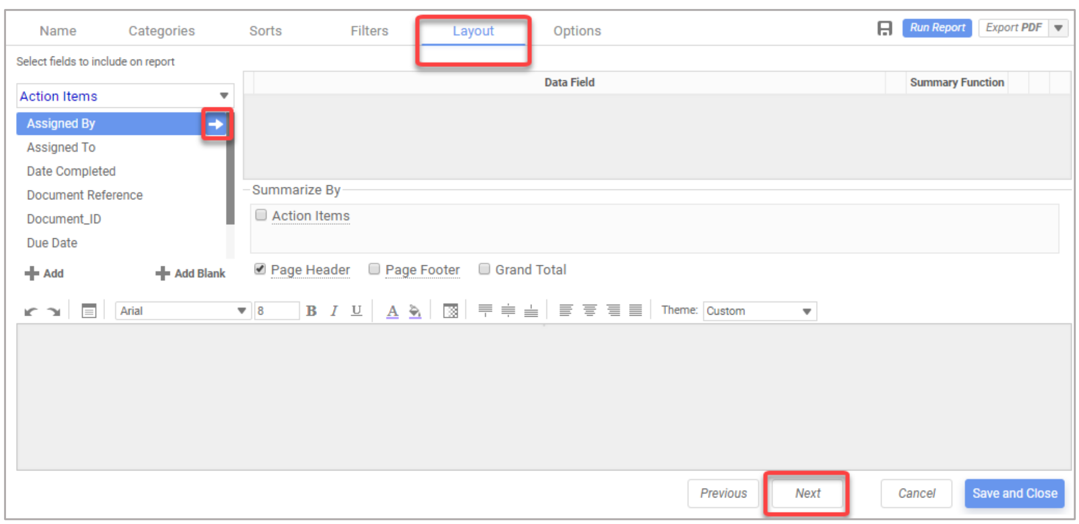


Note: Filters may be applied to the field types. With the Field Type selected, choose the appropriate filter value to apply to the report.

f. Click the **Next** button or **Layout**, select the field type and click the **plus** icon to add to the appropriate Source (Row Header, Column Header, Tabulation Data are all required).



g. Click the**Next** button or **Options**, this is where you can set any options that you would like applied to your report.

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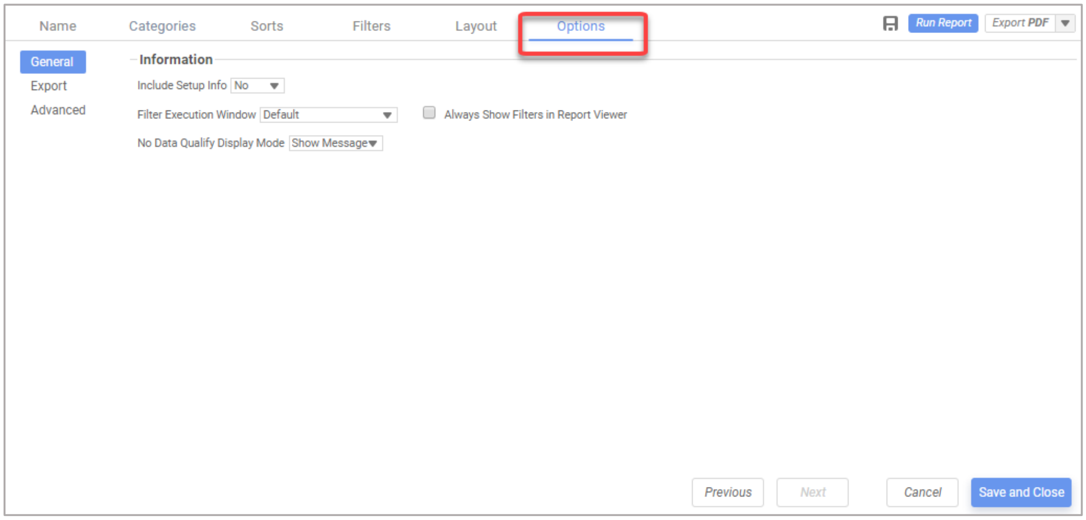
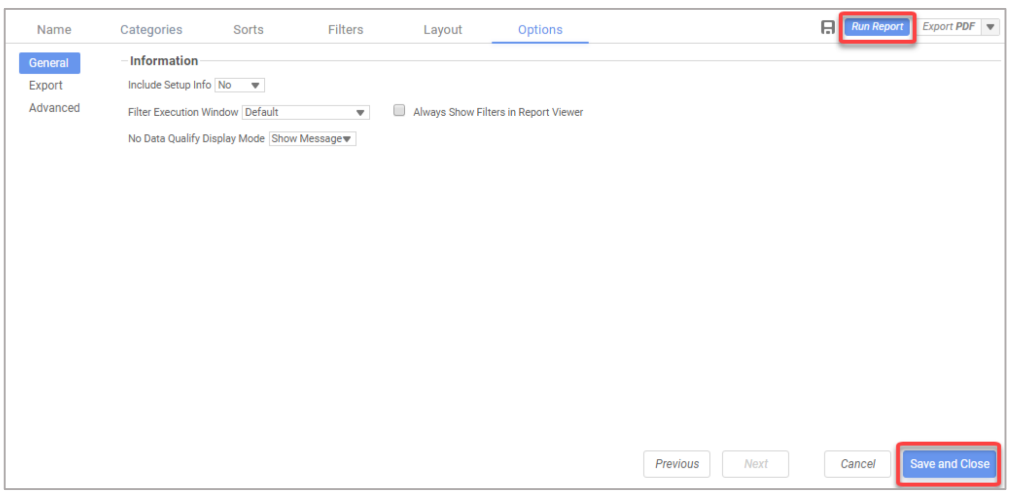


h. Click the **Save and Close** button, or click the **Run Report** button to view the report.



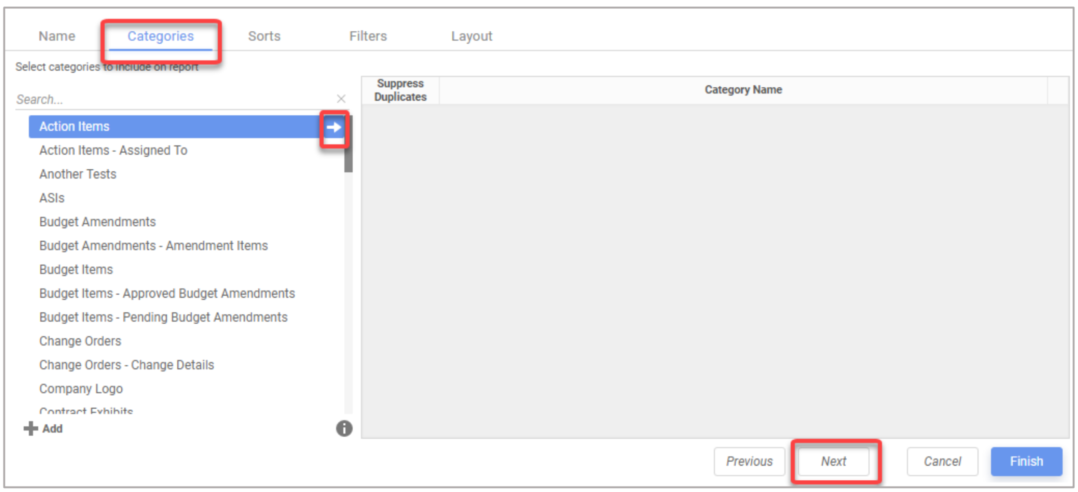
5. **Advanced Report** – Create reports containing charts, maps, gauges, and images. Add group sections to provide more flexibility in how data is displayed.

   a. **Enter the report name** in the blank field.

   b. Select appropriate folder to create report within.

Note: It is recommended to create the report in the **Unpublished** folder first. Once a report has been created it can be moved to the **Published** folder. Reports in the Published folder will display in the reports within a project under My Company Access\Standard Reports.

c. Click the **Next** button or **Categories**, select form types to be included in report. Click **plus** icon at the bottom of the list or the **arrow** icon next to appropriate form type to add to the report.



Note: Multiple form types may be added to a Company Report but any project custom from types cannot be added to Cross Project Reports.

d. Click the **Next** button or **Sorts**, Click **plus** icon at the bottom of the list or the **arrow** icon next to appropriate field type to add to the report.

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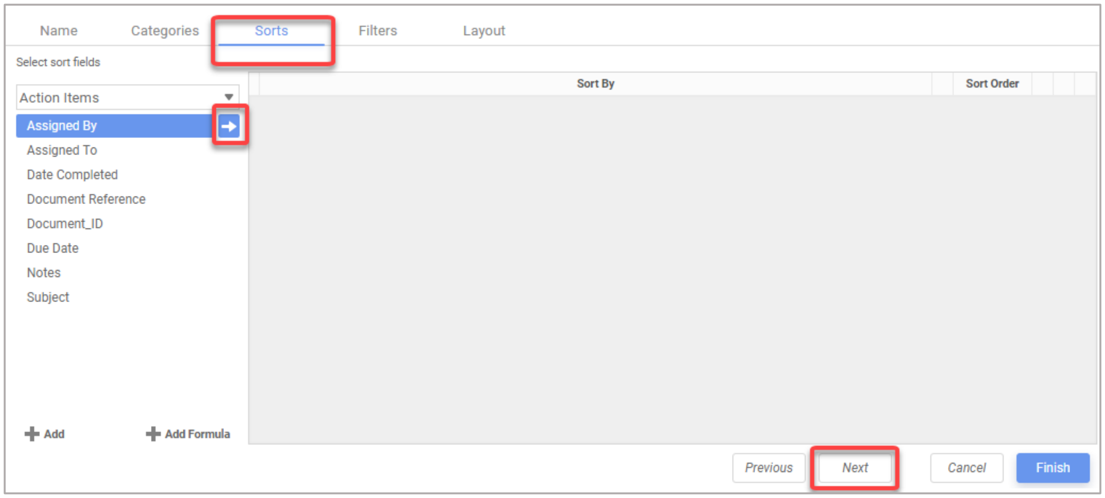
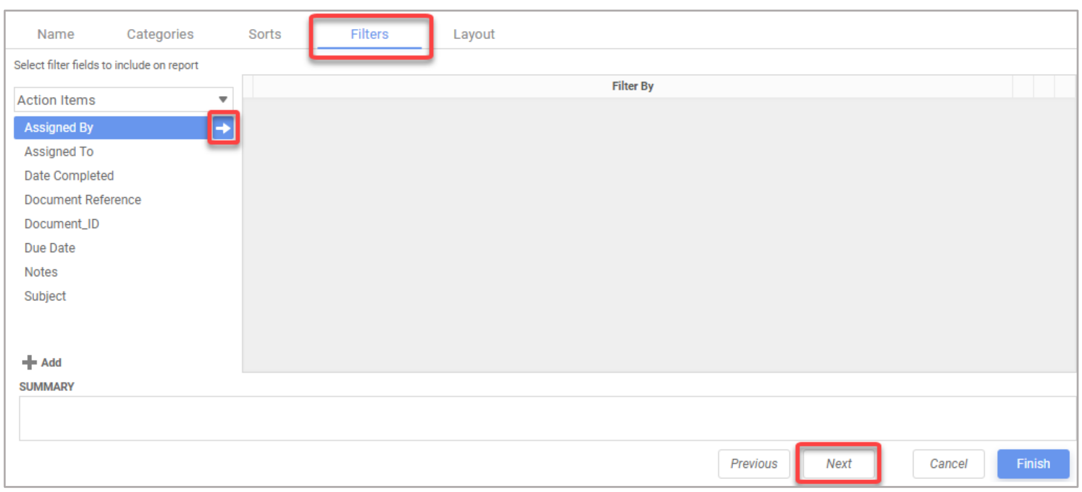


Note: Sorts may be applied to the field types. With the Field Type selected, choose the appropriate sort to apply to the report.

e. Click the **Next** button or **Filters**, select form type from the drop down and appropriate field. Click **plus** icon at the bottom of the list or the **arrow** icon next to appropriate field type to add to the report.



Note: Filters may be applied to the field types. With the Field Type selected, choose the appropriate filter value to apply to the report.

f. Click the **Next** button or **Layout**, select the field type to include in the report. Click the **arrow** icon to add to Data Field.

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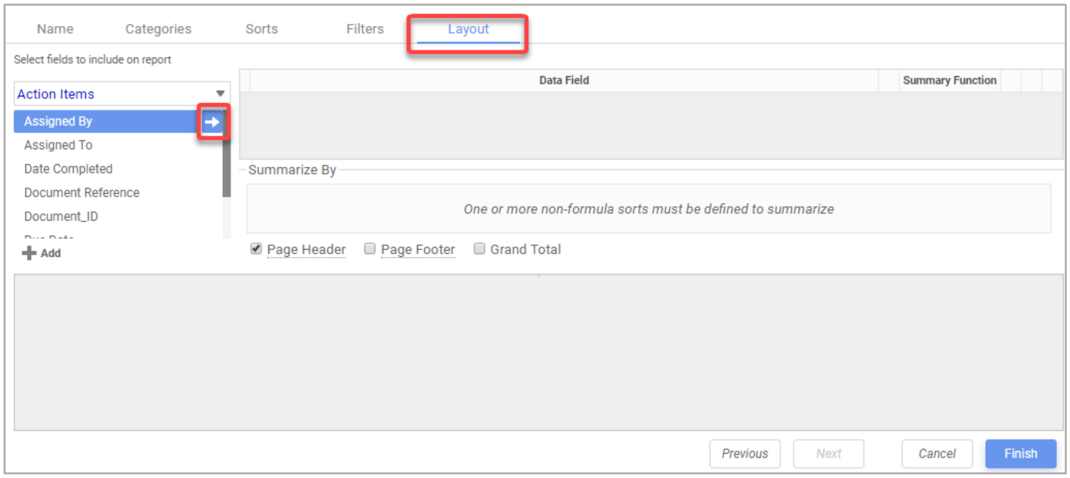
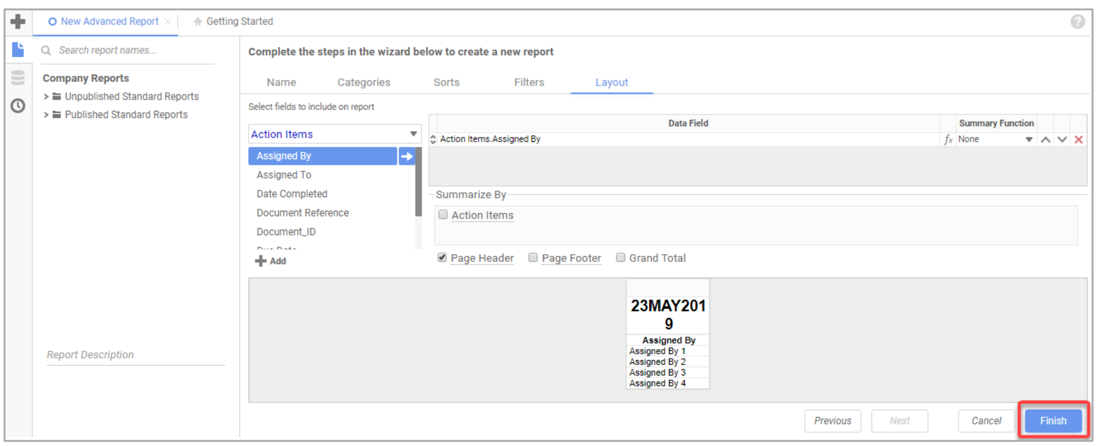
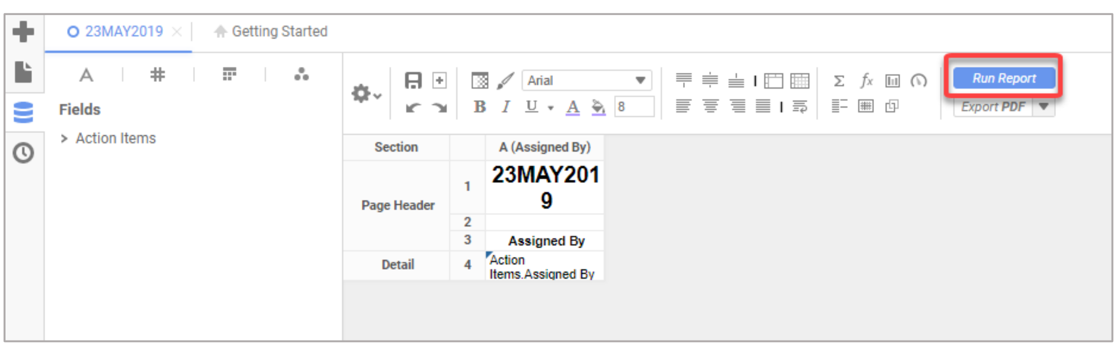


g. Click the **Finish** button.



h. To view the report, click the **Run Report** button.



6. **Crosstab Report** – Create reports that pivot data. The number of columns and rows in the crosstab expands based on the data itself.

    a. **Enter the report name** in the blank field.

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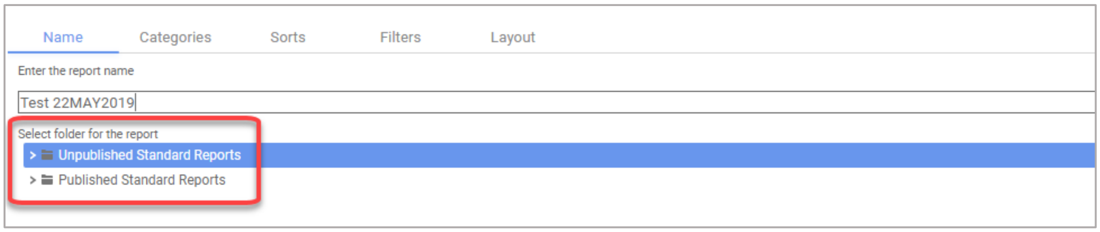
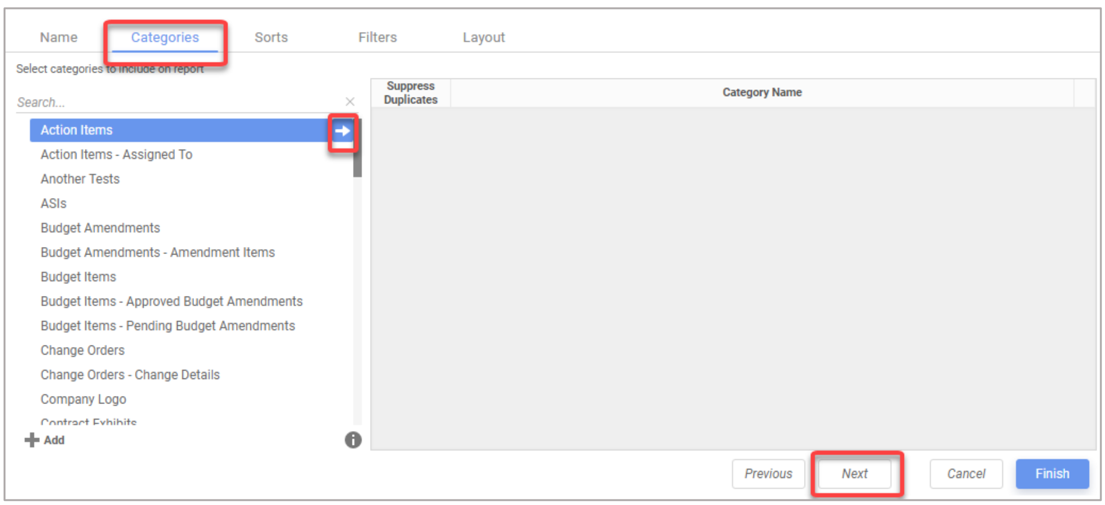
b. Select appropriate folder to create report within.



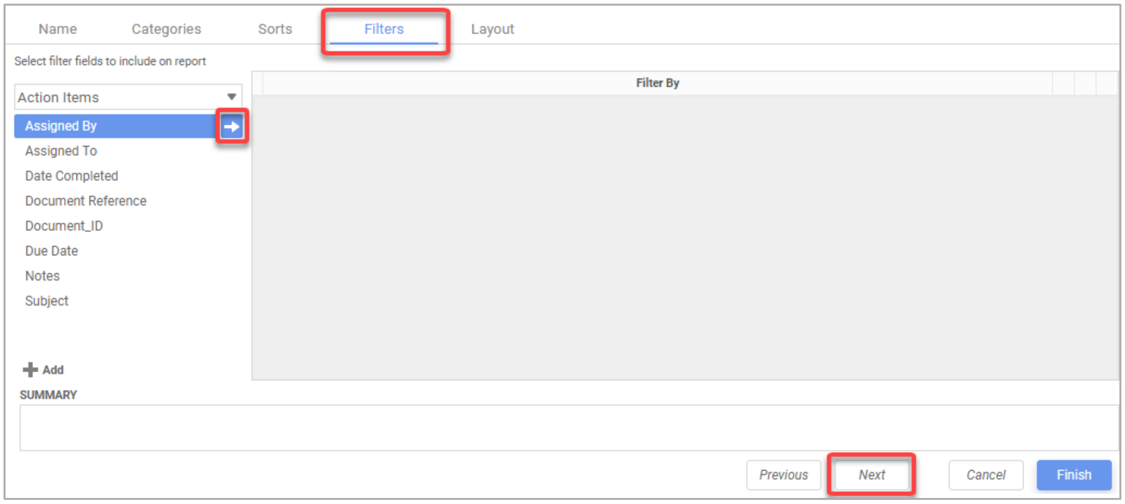
Note: It is recommended to create the report in the **Unpublished** folder first. Once a report has been created it can be moved to the **Published** folder. Reports in the Published folder will display in the reports within a project under My Company Access\Standard Reports.

c. Click the **Next** button or **Categories**, select form types to be included in report. Click **plus** icon at the bottom of the list or the **arrow** icon next to appropriate form type to add to the report.



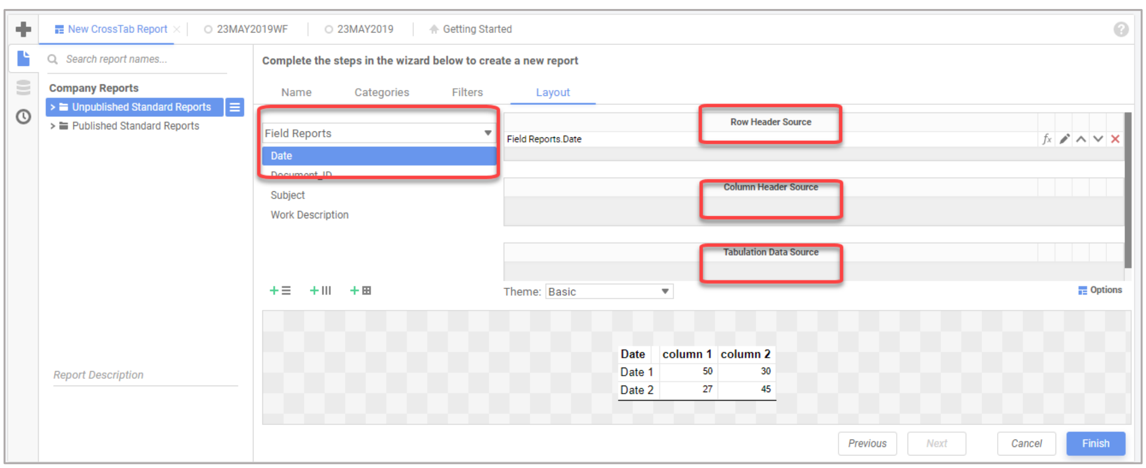
Note: Multiple form types may be added to a Company Report but any project custom from types cannot be added to Cross Project Reports.

d. Click the **Next** button or **Filters**, select form type from the drop down and appropriate field. Click **plus** icon at the bottom of the list or the **arrow** icon next to appropriate field type to add to the report.

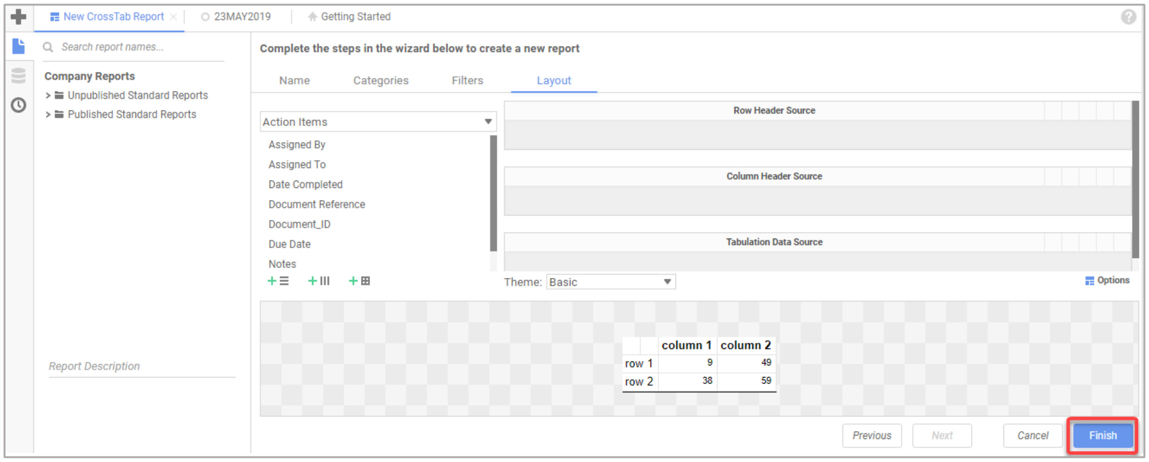


Note: Filters may be applied to the field types. With the Field Type selected, choose the appropriate filter value to apply to the report.

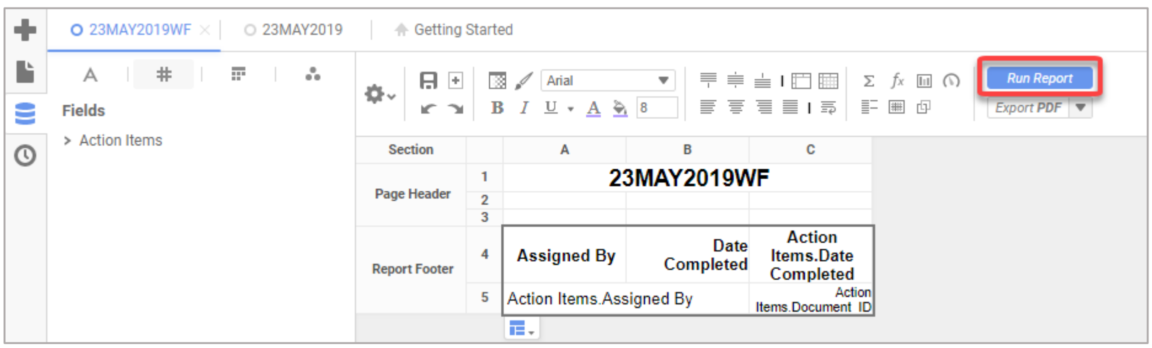
e. Click the **Next** button or **Layout**, drag and drop the field type into the appropriate Source (Row Header, Column Header, Tabulation Data are all required).



f. Click the **Finish** button.



g. To view the report, click the **Run Report** button.



References:

QRG – Reports *(For more detailed instructions on how to write a report in ProjectTeam)*