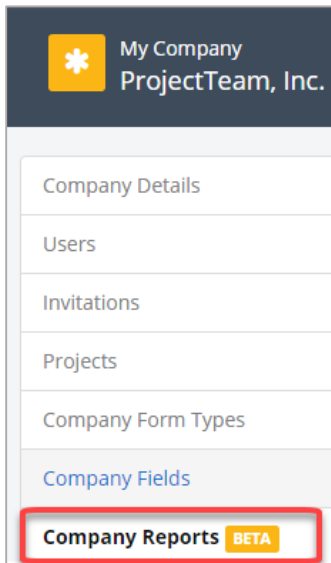
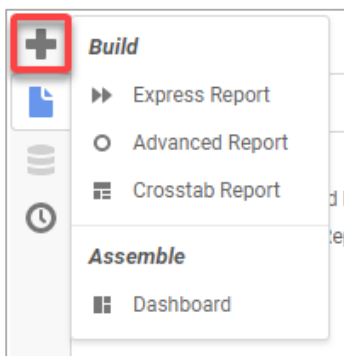


Company Reports

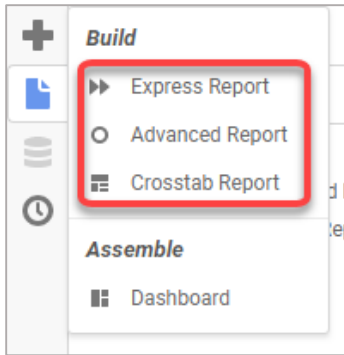
1. From **My Company**, click **Company Reports** on the left hand navigation.



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**.



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.

A screenshot of a report creation form with tabs: 'Name', 'Categories', 'Sorts', 'Filters', 'Layout', and 'Options'. The 'Name' tab is active. It contains a text input field labeled 'Enter the report name' which is highlighted with a red box. Below this field, the text 'Test Report' is visible. There is also a section labeled 'Select folder for the report' with two options: 'Unpublished Standard Reports' (selected and highlighted in blue) and 'Published Standard Reports'.

- b. **Select appropriate folder** to create report within.

A screenshot of the same report creation form as above. The 'Select folder for the report' section is highlighted with a red box. It shows two options: 'Unpublished Standard Reports' (selected and highlighted in blue) and 'Published Standard Reports'.

Note: It is recommended to create the report in the **Unpublished** folder first.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.

The screenshot shows the 'Categories' tab selected in the top navigation bar. Below the tabs, there's a search bar and a list of categories. 'Action Items' is selected, and a red box highlights the plus icon next to it. The right pane is empty. At the bottom, the 'Next' button is highlighted with a red box.

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.

The screenshot shows the 'Sorts' tab selected in the top navigation bar. Below the tabs, there's a search bar and a list of sort fields. 'Assigned By' is selected, and a red box highlights the plus icon next to it. The right pane is empty. At the bottom, the 'Next' button is highlighted with a red box.

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.

Filters

Select filter fields to include on report

- Action Items
- Assigned By
- Assigned To
- Date Completed
- Document Reference
- Document_ID
- Due Date
- Notes
- Subject

+ Add

SUMMARY

Filter By

Previous Next Cancel Save and Close

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).

Layout

Select fields to include on report

- Action Items
- Assigned By
- Assigned To
- Date Completed
- Document Reference
- Document_ID
- Due Date

+ Add

+ Add Blank

Summarize By

- Action Items

Page Header Page Footer Grand Total

Theme: Custom

Previous Next Cancel Save and Close

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

Options

General

Information

Include Setup Info | No

Filter Execution Window | Default

No Data Qualify Display Mode | Show Message

Always Show Filters in Report Viewer

Previous Next Cancel Save and Close

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

Options

General

Information

Include Setup Info | No

Filter Execution Window | Default

No Data Qualify Display Mode | Show Message

Always Show Filters in Report Viewer

Previous Next Cancel Save and Close

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.

Name

Categories

Sorts

Filters

Layout

Enter the report name

Test 22MAY2019

Select folder for the report

Unpublished Standard Reports

Published Standard Reports

- b. Select appropriate folder to create report within.

Name Categories Sorts Filters Layout

Enter the report name

Test 22MAY2019

Select folder for the report

- Unpublished Standard Reports
- Published Standard Reports

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.

Name Categories Sorts Filters Layout

Select categories to include on report

Search...

- Action Items
- Action Items - Assigned To
- Another Tests
- ASIs
- Budget Amendments
- Budget Amendments - Amendment Items
- Budget Items
- Budget Items - Approved Budget Amendments
- Budget Items - Pending Budget Amendments
- Change Orders
- Change Orders - Change Details
- Company Logo
- Contract Exhibits

Suppress Duplicates

Category Name

Previous Next Cancel Finish

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.

The screenshot shows the 'Sorts' tab selected in the report configuration interface. The 'Sort By' field is empty. The 'Sort Order' field is set to 'Ascending'. The 'Action Items' list on the left includes 'Assigned By', 'Assigned To', 'Date Completed', 'Document Reference', 'Document_ID', 'Due Date', 'Notes', and 'Subject'. The 'Assigned By' item is highlighted with a blue bar and a red arrow icon next to it. The 'Next' button is highlighted with a red box at the bottom right.

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.

The screenshot shows the 'Filters' tab selected in the report configuration interface. The 'Filter By' field is empty. The 'Action Items' list on the left includes 'Assigned By', 'Assigned To', 'Date Completed', 'Document Reference', 'Document_ID', 'Due Date', 'Notes', and 'Subject'. The 'Assigned By' item is highlighted with a blue bar and a red arrow icon next to it. The 'Next' button is highlighted with a red box at the bottom right.

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.

The screenshot shows the 'Layout' tab of a report wizard. On the left, a list of fields under 'Action Items' includes 'Assigned By', 'Assigned To', 'Date Completed', 'Document Reference', and 'Document_ID'. 'Assigned By' is selected and highlighted with a red box. In the center, there are sections for 'Data Field', 'Summary Function', and 'Summarize By'. At the bottom, there are checkboxes for 'Page Header', 'Page Footer', and 'Grand Total'. The 'Finish' button is highlighted with a red box.

g. Click the **Finish** button.

The screenshot shows the 'Run Report' button in the report wizard. The 'Finish' button is highlighted with a red box. The report preview shows a table with columns for 'Section', 'Page Header', and 'Detail'. The data includes '23MAY2019' and 'Assigned By'.

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

The screenshot shows the 'Run Report' button in the report wizard. The 'Run Report' button is highlighted with a red box. The report preview shows a table with columns for 'Section', 'Page Header', and 'Detail'. The data includes '23MAY2019' and 'Assigned By'.

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.

- b. Select appropriate folder to create report within.

The screenshot shows the 'Name' tab of a report creation window. At the top, there are tabs for 'Name', 'Categories', 'Sorts', 'Filters', and 'Layout'. Below the tabs, there is a text input field labeled 'Enter the report name' containing the text 'Test 22MAY2019'. Underneath this field is a section titled 'Select folder for the report' which contains two radio button options: 'Unpublished Standard Reports' (which is selected and highlighted with a red box) and 'Published Standard Reports'.

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.

The screenshot shows the 'Categories' tab of the report creation window. The 'Categories' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'Select categories to include on report'. On the left, there is a search bar and a list of categories. The category 'Action Items' is selected and highlighted with a red box. A red box also highlights the plus icon at the bottom of the list. On the right, there is a table with columns 'Suppress Duplicates' and 'Category Name'. At the bottom, there are buttons for 'Previous', 'Next' (highlighted with a red box), 'Cancel', and 'Finish'.

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.

The screenshot shows the 'Filters' tab of a report configuration window. On the left, under 'Select filter fields to include on report', there is a list of 'Action Items' including 'Assigned By', 'Assigned To', 'Date Completed', 'Document Reference', 'Document_ID', 'Due Date', 'Notes', and 'Subject'. 'Assigned By' is highlighted with a blue bar and a red arrow pointing to the right. Below this list is an 'Add' button. On the right, there is a large empty box labeled 'Filter By'. At the bottom right, there are four buttons: 'Previous', 'Next' (highlighted with a red box), 'Cancel', and 'Finish'.

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).

The screenshot shows the 'Layout' tab of the report configuration window. On the left, there is a sidebar with 'Company Reports' and a search bar. The main area is titled 'Complete the steps in the wizard below to create a new report'. It has tabs for 'Name', 'Categories', 'Filters', and 'Layout' (which is active). Under 'Field Reports', a list is expanded showing 'Date', 'Document_ID', 'Subject', and 'Work Description'. 'Date' is highlighted with a blue bar. On the right, there are three red boxes labeled 'Row Header Source', 'Column Header Source', and 'Tabulation Data Source'. Below these, there is a 'Theme' dropdown set to 'Basic' and an 'Options' button. At the bottom, there is a preview table on a checkered background:

Date	column 1	column 2
Date 1	50	30
Date 2	27	45

At the bottom right, there are four buttons: 'Previous', 'Next' (highlighted with a red box), 'Cancel', and 'Finish'.

- f. Click the **Finish** button.

Complete the steps in the wizard below to create a new report

Name Categories Filters **Layout**

Row Header Source

Column Header Source

Tabulation Data Source

Theme: Basic

	column 1	column 2
row 1	9	49
row 2	38	59

Previous Next Cancel **Finish**

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

23MAY2019WF

Section

	A	B	C
Page Header	23MAY2019WF		
Report Footer	Assigned By	Date Completed	Action Items.Date Completed
	Action Items.Assigned By		Action Items.Document ID

Run Report Export PDF

References:

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