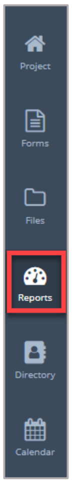
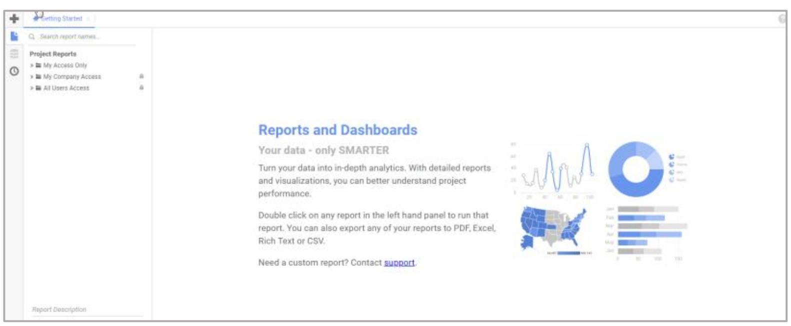
Reports

Reporting is available in all project and can be accessed from the Project Homepage or from anywhere within the project by clicking the **'Reports'** button in the upper right corner of the secondary navigation bar.

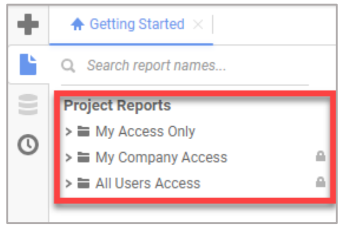
1. Click the **Reports** icon on the left navigation pane.



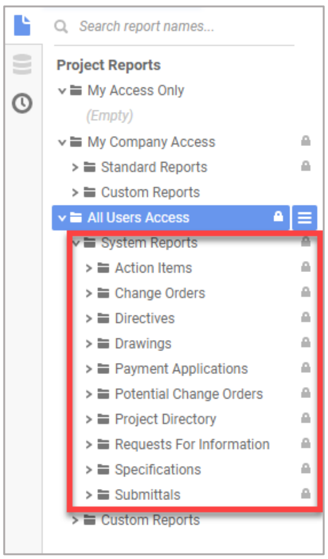
2. The reports pane will open.



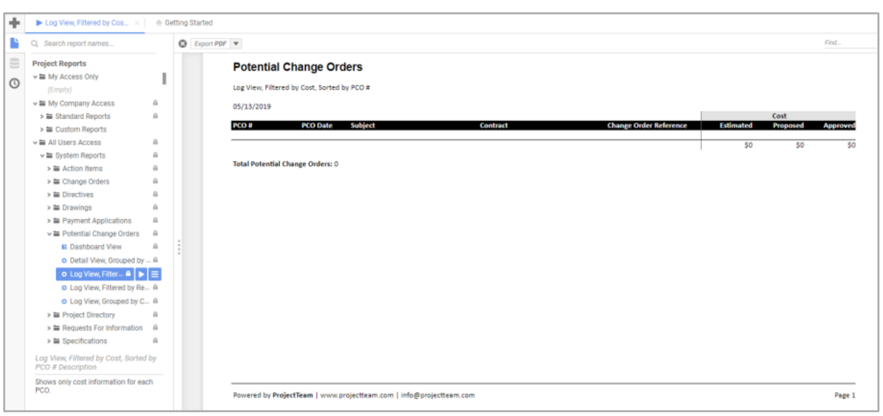
3. There are three folders contained in the reports tree.
    a. **My Access Only** – contains reports you are currently working on and are accessible to the User only.
    b. **My Company Access** – Reports that are ready to use on the project and accessible to all users for your company.
    c. **All Users Access** – Reports which are published and ready for use by all project users.



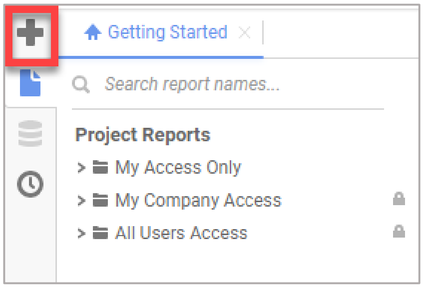
4. By default all users will have access to **All User Reports** in the **System Reports** folder. The reports will be organized by the form type name. Reports contained in this folder are locked and cannot be edited. To make changes to any System Report the report must be cloned to either My Access Only or My Company Access Custom Reports folders.



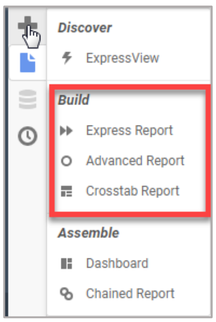
5. Although any user can run any **System Report**, they **<u>must</u>** have access to the form data to generate the report. If they do not have access to the data contained in the report they will only receive a blank report.



6. To create a new report click the plus sign (**+**) in the top left corner of the screen.

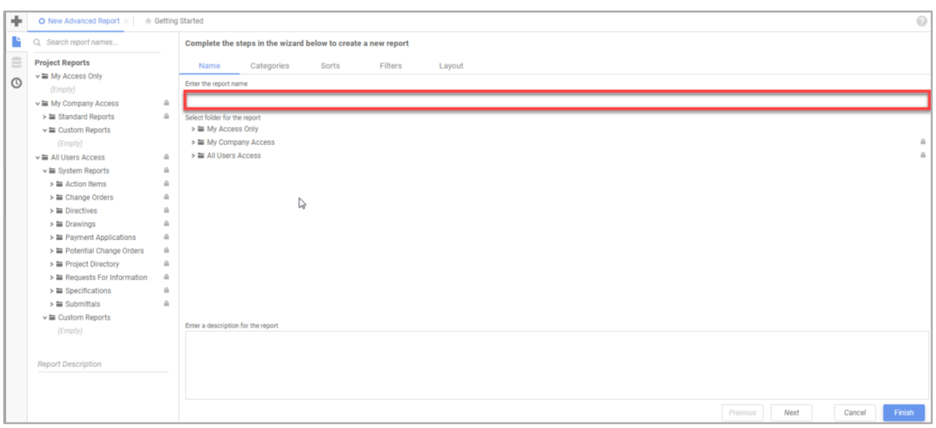


7. The User will be prompted to select the **Build** (type) report to be created.



a. **Express Report** – Quickly create tabular reports with essential operations like sorting, filtering and calculations. Easily format and summarize data.
b. **Advanced Report** – Create reports containing charts, maps, gauges, and images. Add group sections to provide more flexibility in how data is displayed.
c. **Crosstab Report** – Create reports that pivot data. The number of columns and rows in the crosstab expands based on the data itself.

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



9. Select the folder where the report is to be saved by clicking the folder title.

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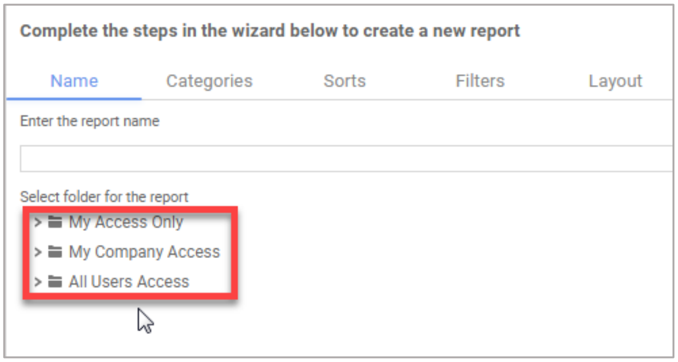
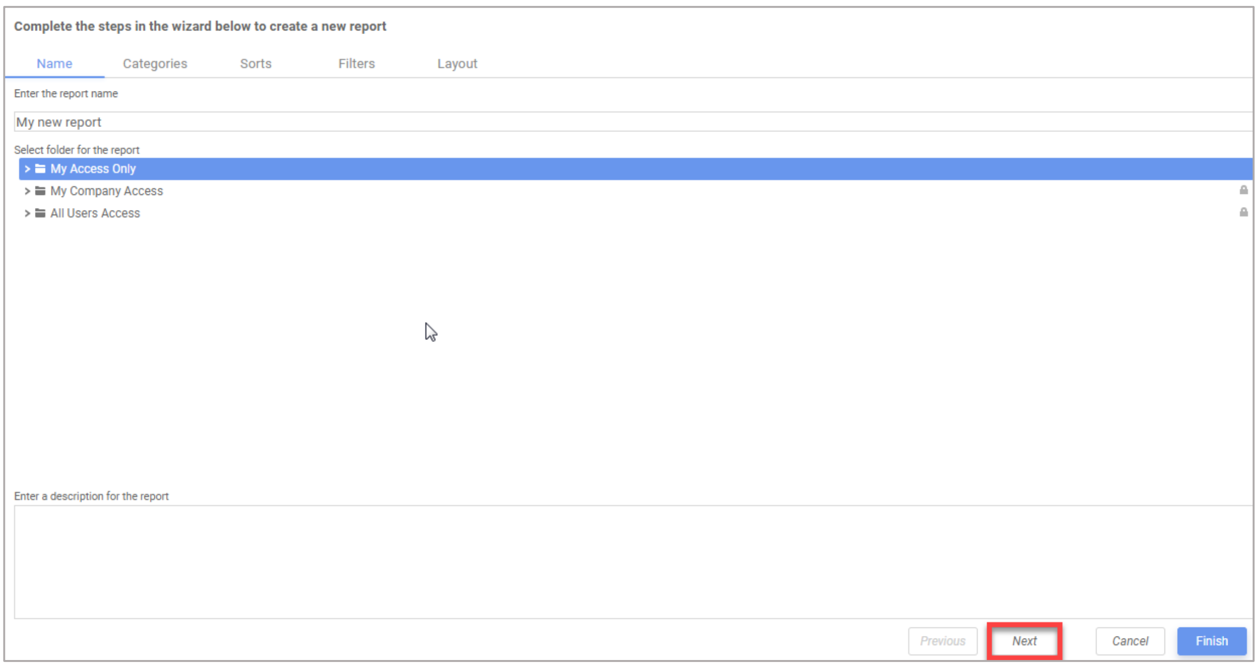
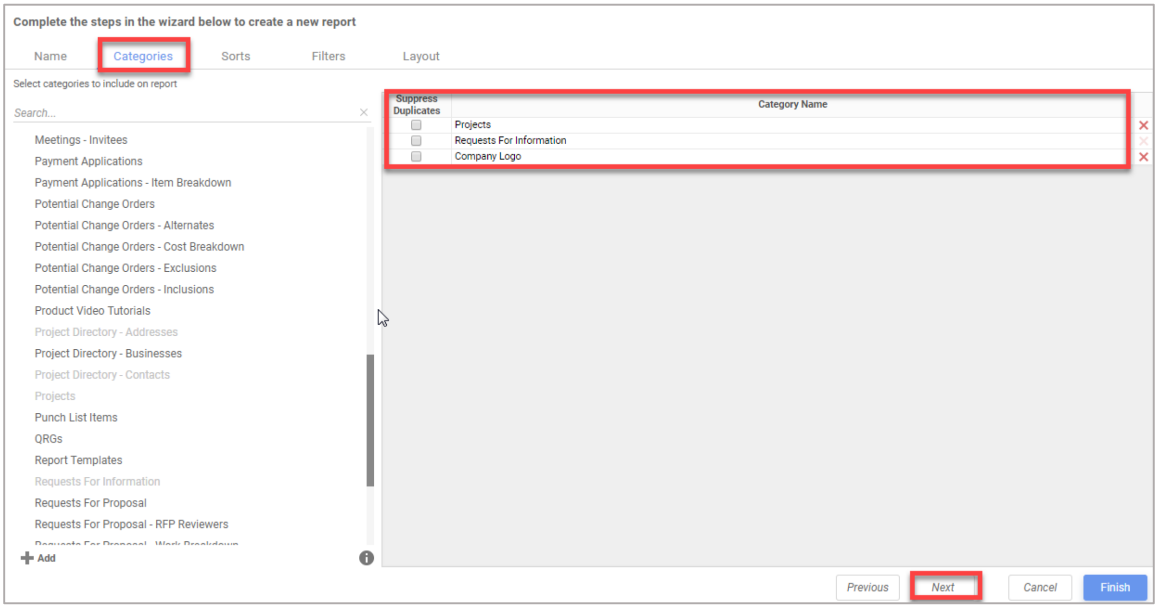


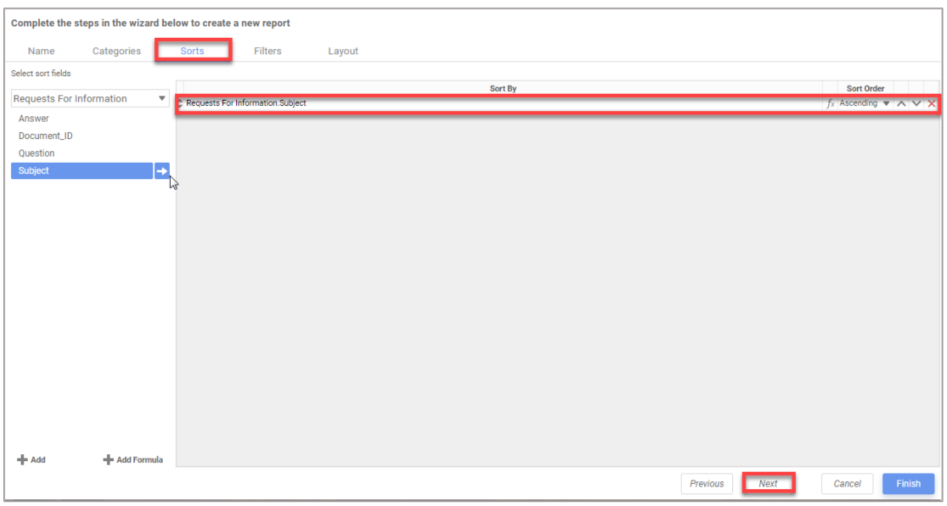
10. Click the **Next** button to open the **Categories** tab.



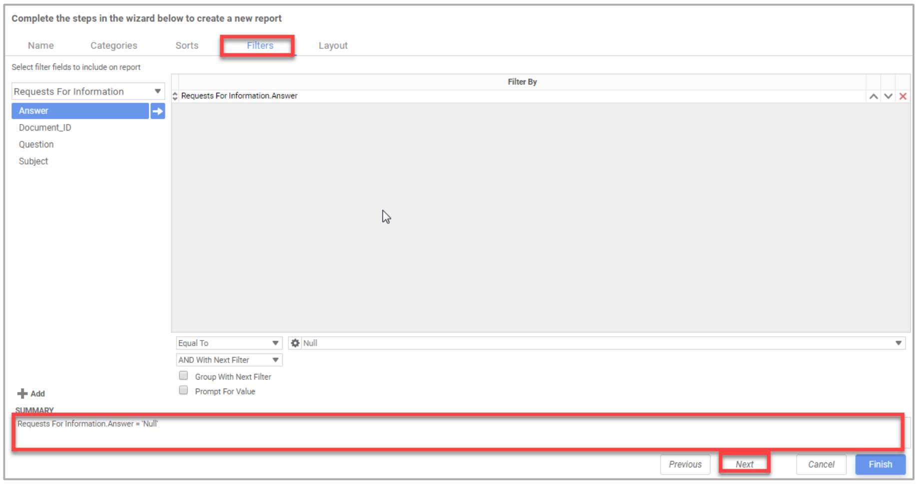
11. Double-click the form name where the data resides (i.e. **Request for Information**, **Projects**, **Company Logo**) to add this information to the report. This will allow access to the information contained in the RFI data form, project specific data such as company name and address and the company logo. Click the **Next** button to open the **Sorts** tab.



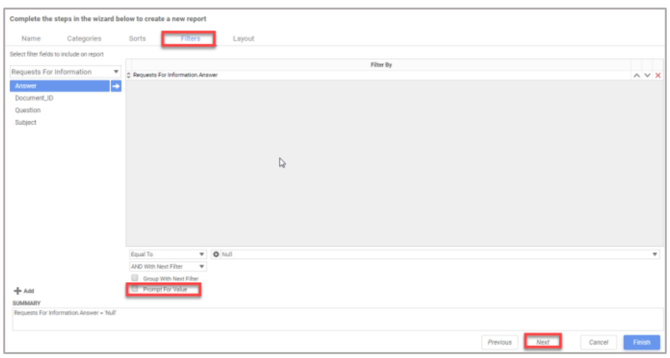
12. **Double-click the primary field** to sort by and click the dropdown to choose **Ascending** or **Descending**. Click the **Next** button to open the **Filters** tab.



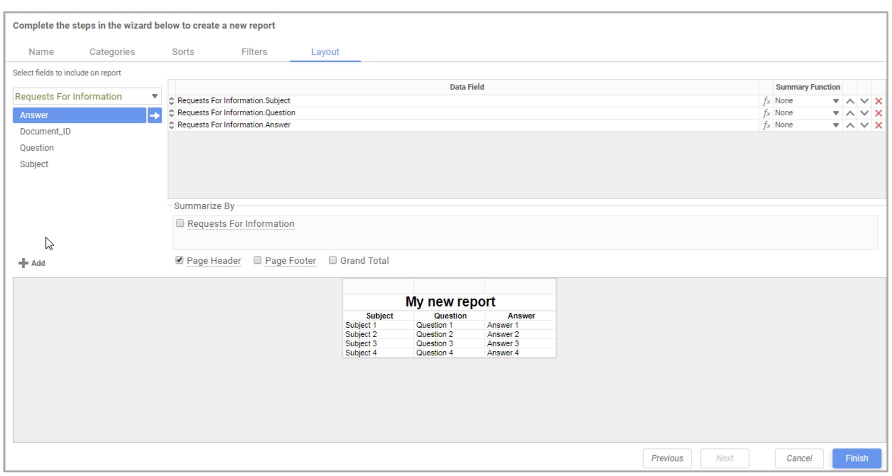
13. Filters may be applied to the field types using an **operator** and entering specific **filter criteria**.



Note: If the user will be required to enter a value, click the **Prompt for Value** radio button. Click the **Next** button to open the **Layout** tab.



14. **Double-click** each field, in the order the fields should show on the report.



Note: To reorder the columns, use the up or down arrows, in the top right hand grid, to move the columns to the desired location. Click the **Finish** button.

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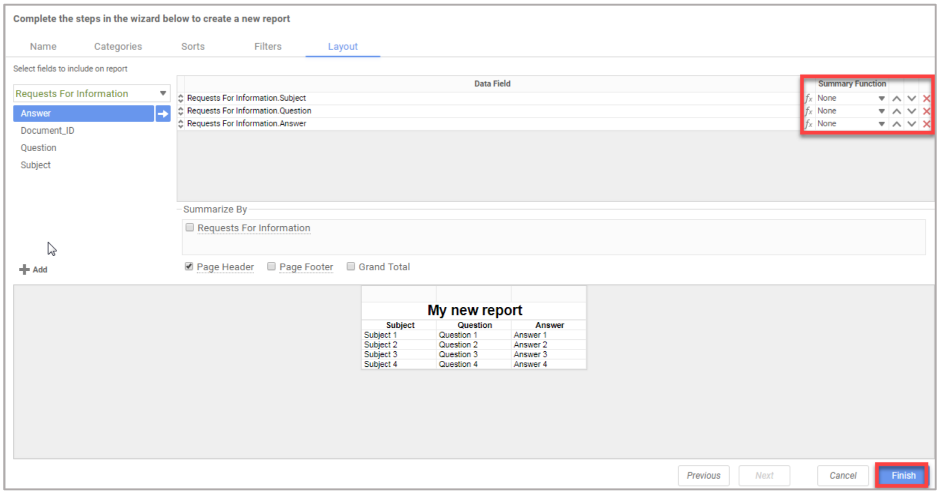
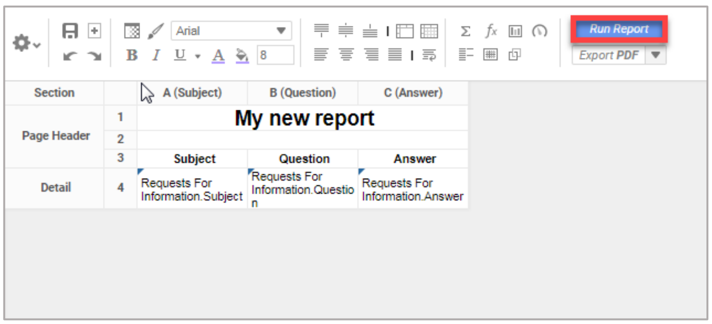


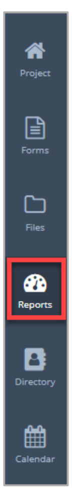
15. To view the draft report, click the **Run Report** button.



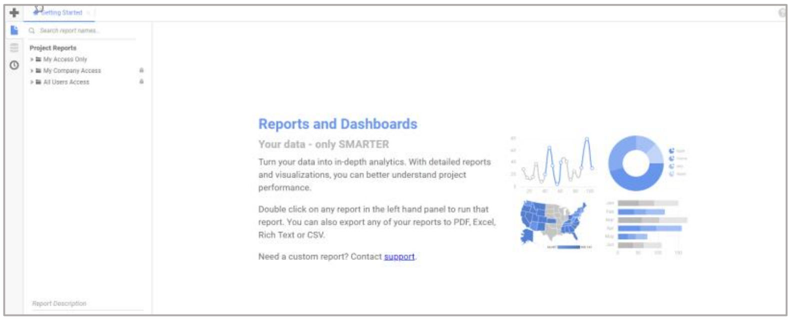
Edit and Formatting a Report

A user may only edit reports they own. To edit a report created by another user, the user will need to first clone the report a folder.

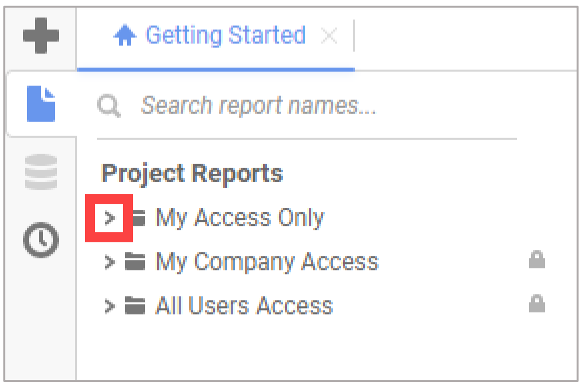
1. Click the **Reports** icon on the left navigation pane.



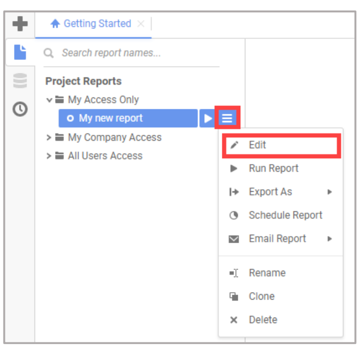
2. The reports pane will open.



3. Click the arrow beside the folder containing the report to be modified to expand the report tree.



Click the **title of the report**, click the **three bars icon** and select **Edit**.



4. To insert or delete a row, click the **row number** and select **Insert Rows Before**, **Insert Rows After** or **Delete Rows**.

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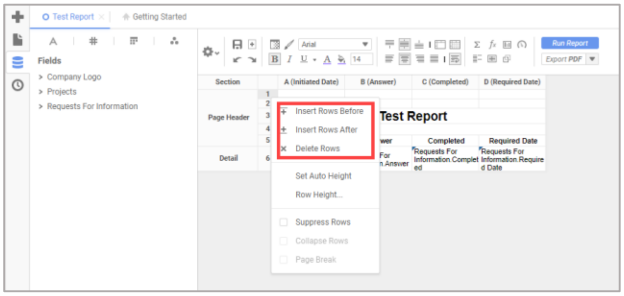
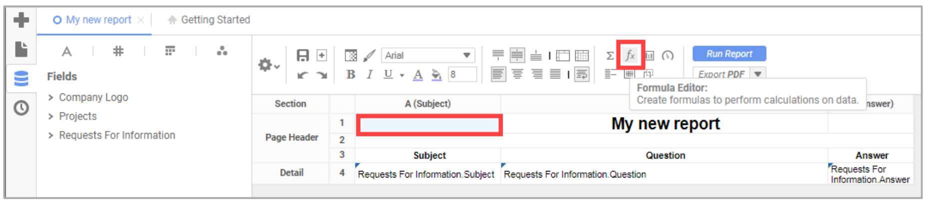
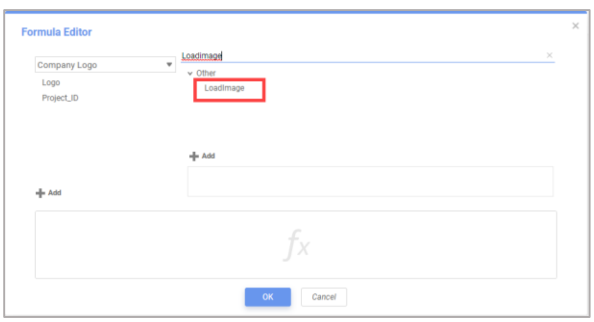


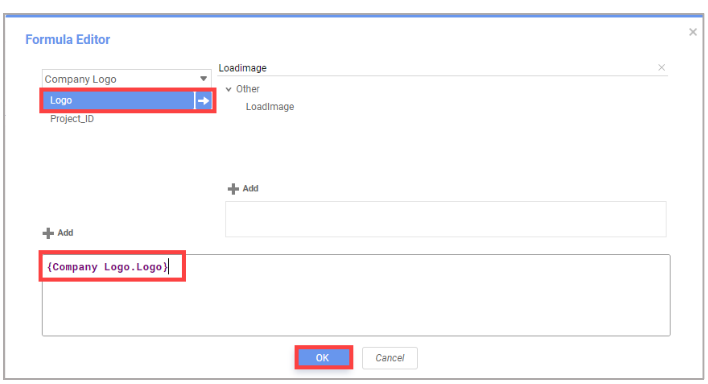
5. To add the Company Logo, click **inside the cell** where the logo will reside and click the **function key**.



6. In the Search for Functions field, type **LoadImage**. When function displays, double-click the **function** to add it to the function statement box.



7. In the field selector, double-click the **Logo** field to add to the function statement box and click the **OK** button to save the function.



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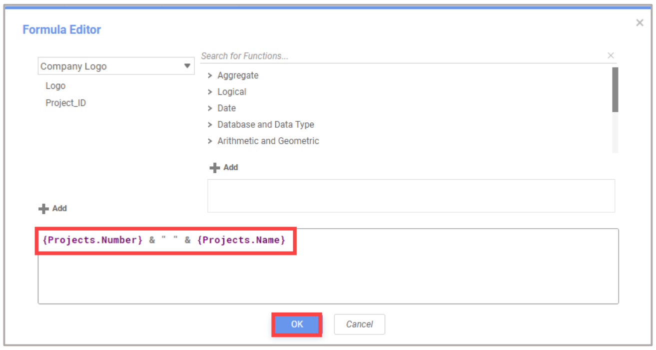
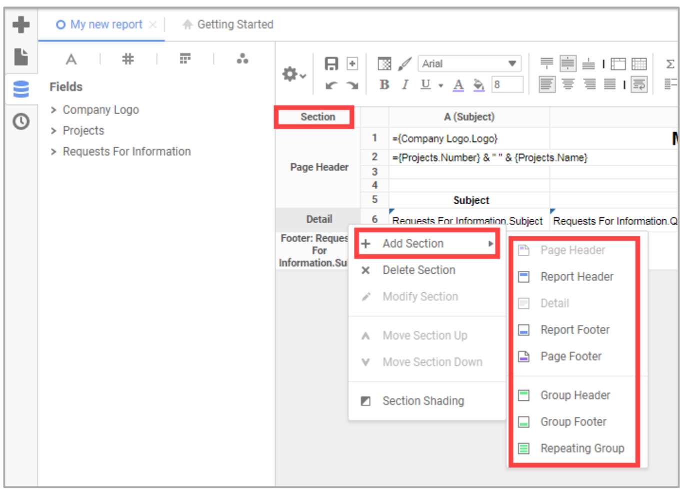
8. To add the Project Name and Project Number to the report, select a cell and enter the following function: **= {Projects.Number} & " " & {Projects.Name}**



9. Click your right mouse button on any section to then select Add Section such as Page Header, Report Header, Report Footer, Page Footer, Group Header, Group Footer or Repeating Group.



a. Section Descriptions
   i. **Page Header** – appears at the top of every page.
   ii. **Report Header** – appears at the beginning of the report.
   iii. **Detail** – appears once for each row of data returned during execution.
   iv. **Report Footer** – Contains summaries for the entire report and appears at the end of the report.
   v. **Page Footer** – appears at the bottom of each page. Can report on things such as Page #, etc.
   vi. **Group Header** –used as leading or title areas for more detailed information that follows. A report can have multiple group headers for varying levels of data.
   vii. **Group Footer** - used as trailing areas for more detailed information that preceded it. They are mainly used for aggregate data, such as sums and averages. A report can have multiple group footers for varying levels of data.
   viii. **Repeating Group** - used for information that you want to repeat before continuing with other information in the report. Each repeating section can

have its own header and footer allowing aggregate values on just the information within the repeating group.

10. Basic formatting can be performed on the report using the formatting section at the top of the report. Select the cell(s) to be formatted and select the format from the toolbox below:

    a. Format cells

    b. Format print brush

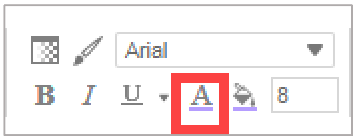
    c. Format font

    d. Bold

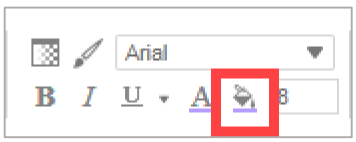
    e. Italic

f. Underline text

g. Text color



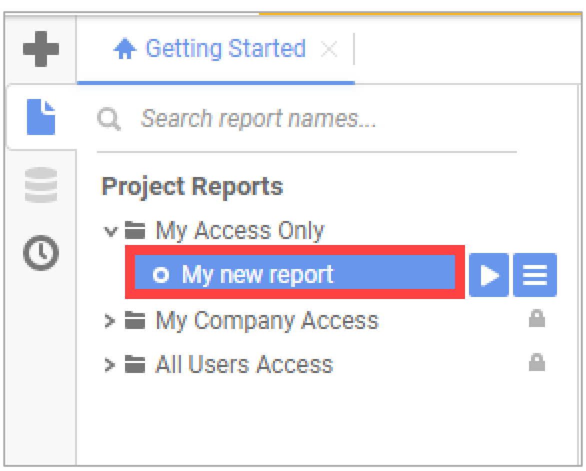
h. Background color



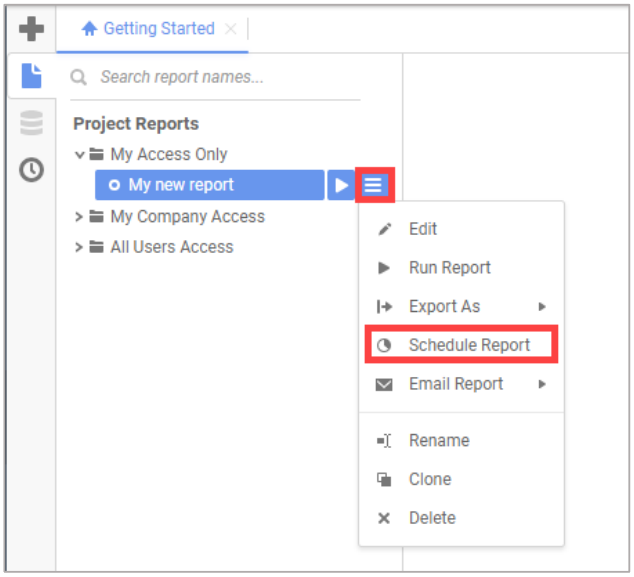
Scheduling Report

Reports can be scheduled to email to a select group of users or email addresses on a daily, weekly, or monthly basis. To schedule a report follow the instructions below:

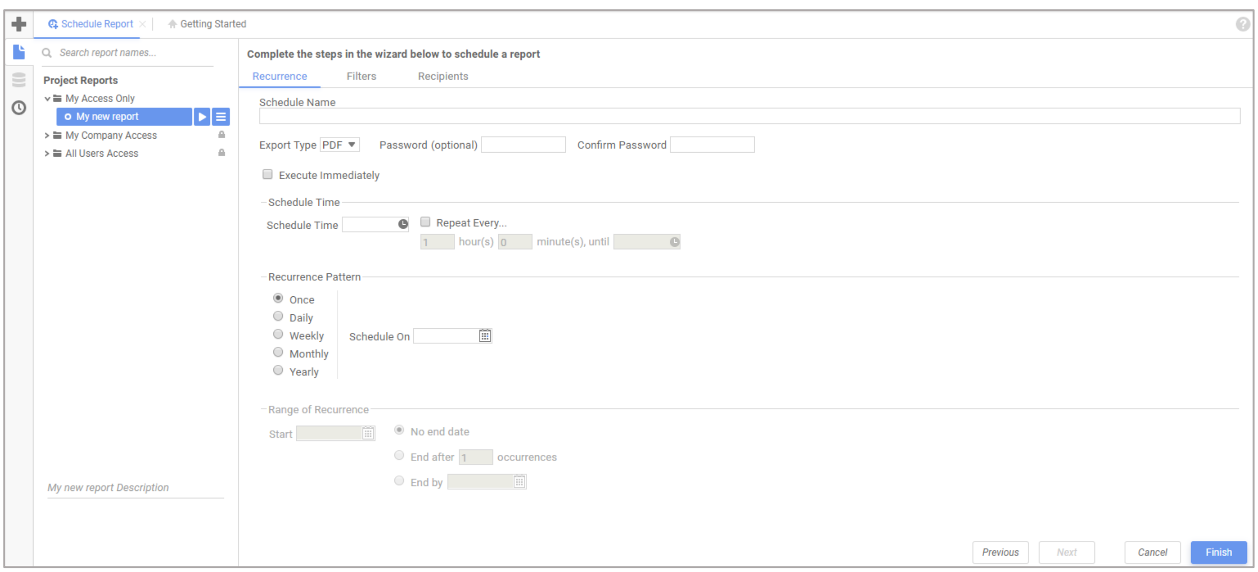
1. Click the **report name** for the report to be scheduled.



2. Click the **3 bar icon** and select **Schedule Report**.



3. The report schedule pane will open to the **Recurrence** tab. Complete the following fields on this tab.



a. Schedule Name.

b. Export Type

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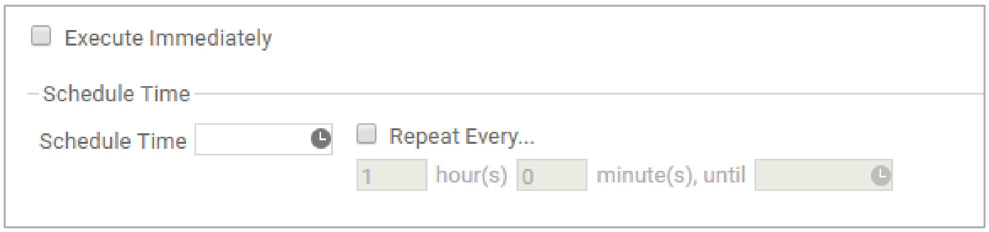
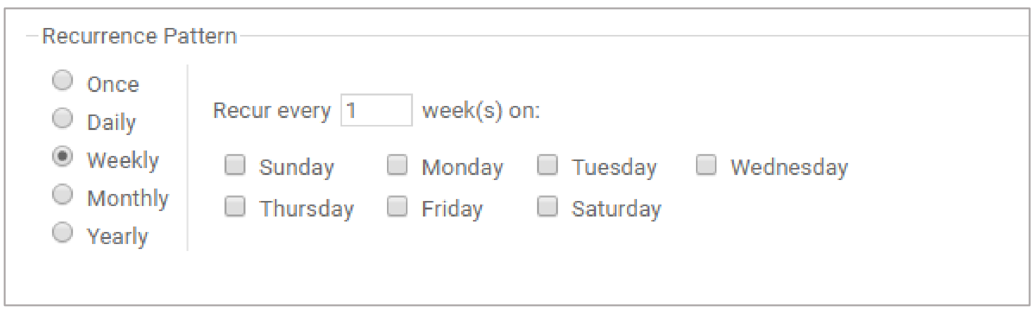
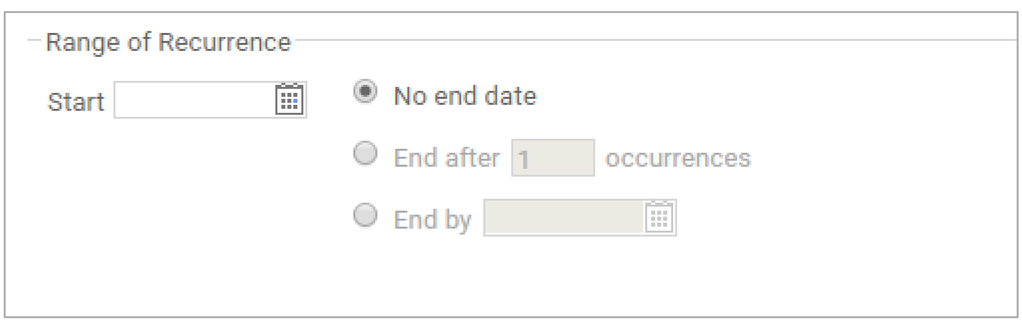
c. Check the **Execute Immediately** only if you want the report to email upon saving the schedule. Enter the **Scheduled Time** the reports is to email and if you want it to repeat hourly.



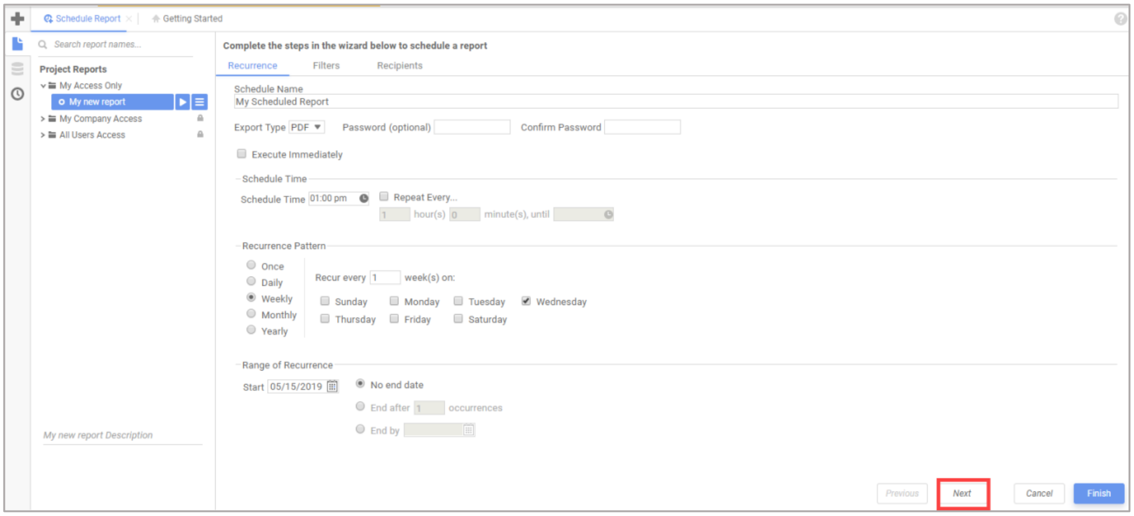
d. Recurrence Pattern



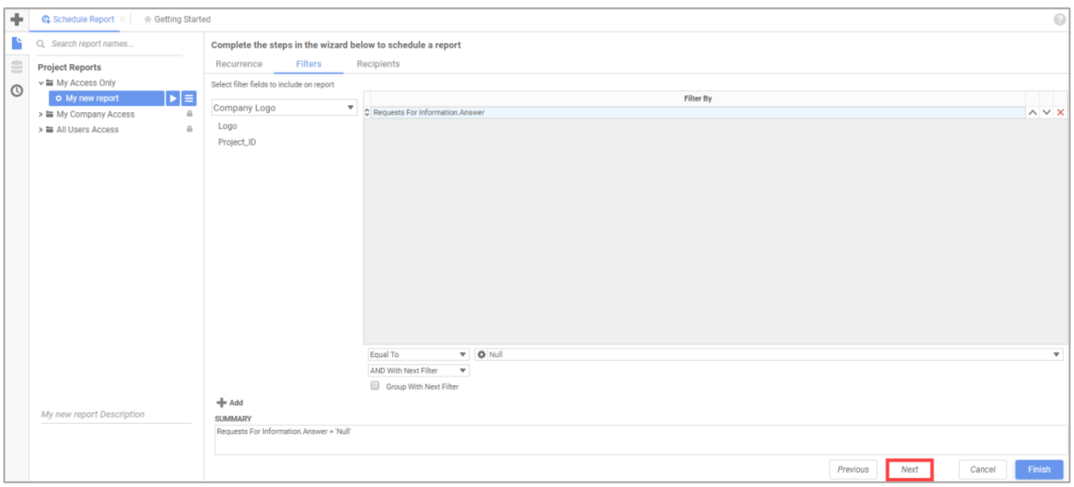
e. Range of Recurrence



4. Click **Next**.



5. The **Filters** tab will open. Any filters applied to the original report will remain. The User can also apply additional filters if necessary. Click **Next**.



6. The **Recipients** tab will open. Enter email addresses in the **To**, **CC**, and **BCC** fields and add any text necessary to the body of the email. Click **Finish**.

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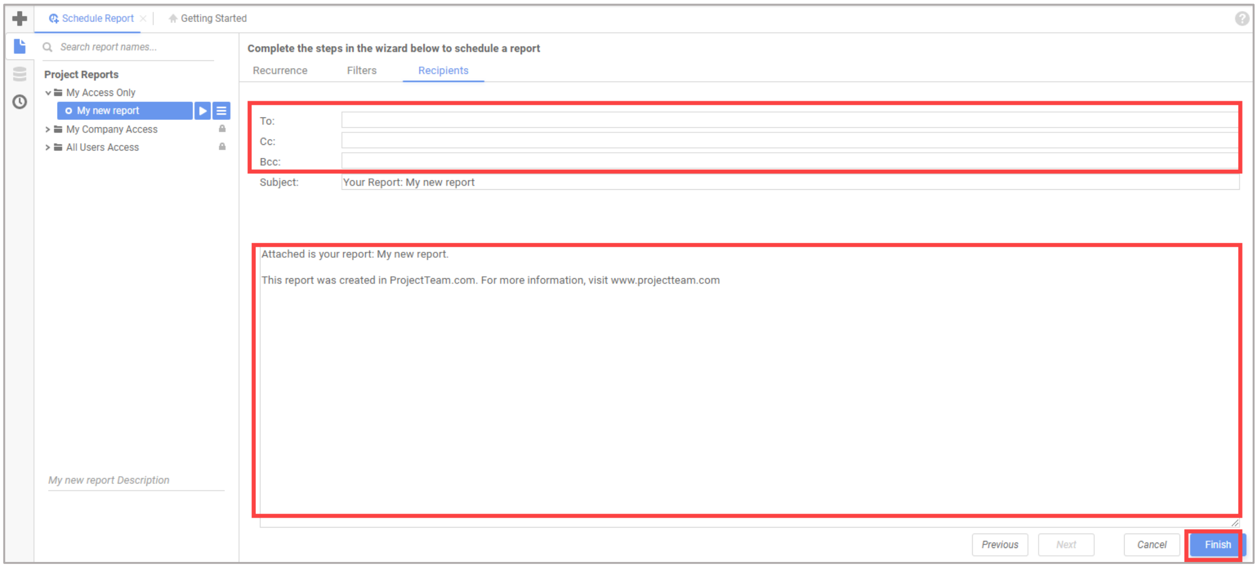

Schedule Report
Getting Started
Search report names...
Project Reports
My Access Only
My new report
My Company Access
All Users Access
My new report Description
Complete the steps in the wizard below to schedule a report
Recurrence
Filters
Recipients
To:
Cc:
Bcc:
Subject:
Your Report: My new report
Attached is your report: My new report.
This report was created in ProjectTeam.com. For more information, visit www.projectteam.com
Previous
Next
Cancel
Finish