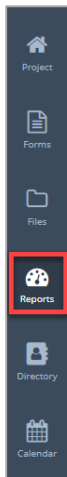


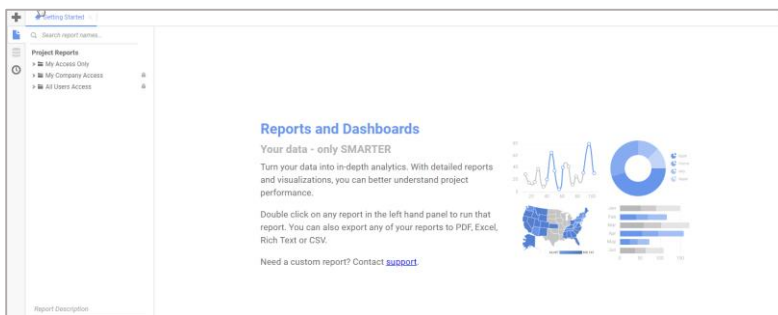
Reports

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.

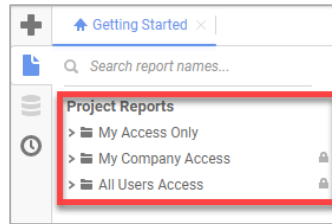
1. Click the **Reports** icon on the left navigation pane.



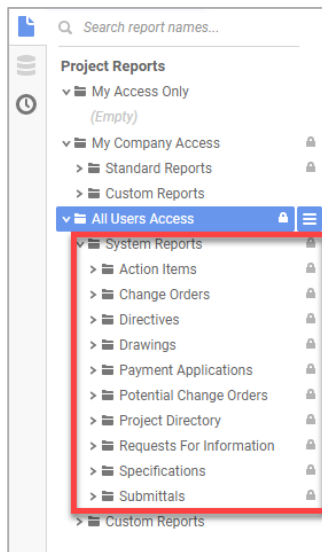
2. The reports pane will open.



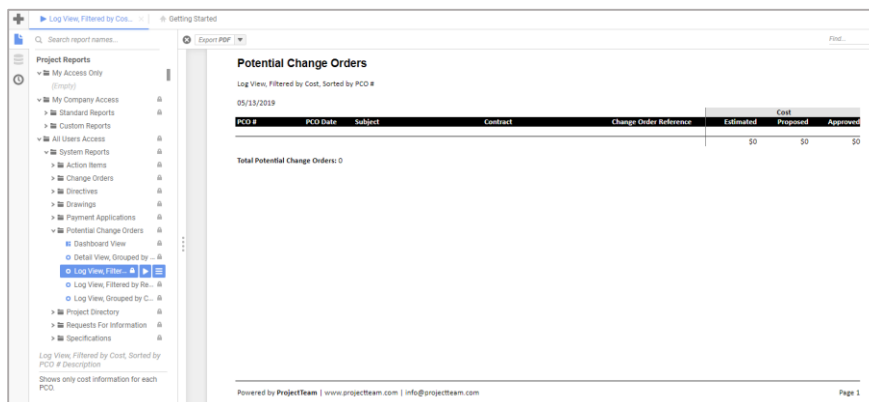
3. There are three folders contained in the reports tree.
 - a. **My Access Only** – contains reports you are currently working on and are accessible to the User only.
 - b. **My Company Access** – Reports that are ready to use on the project and accessible to all users for your company.
 - c. **All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



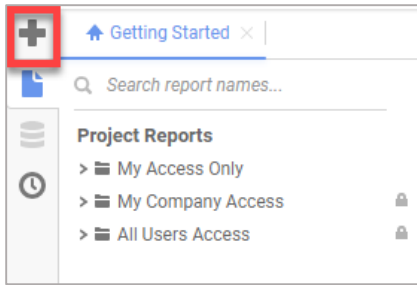
4. By default all users will have access to **All User Reports** in the **System Reports** folder. The reports will be organized by the form type name. Reports contained in this folder are locked and cannot be edited. To make changes to any System Report the report must be cloned to either My Access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



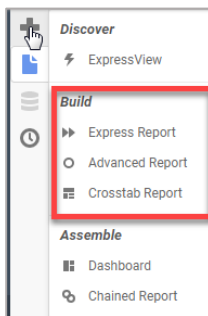
5. Although any user can run any **System Report**, they must have access to the form data to generate the report. If they do not have access to the data contained in the report they will only receive a blank report.



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

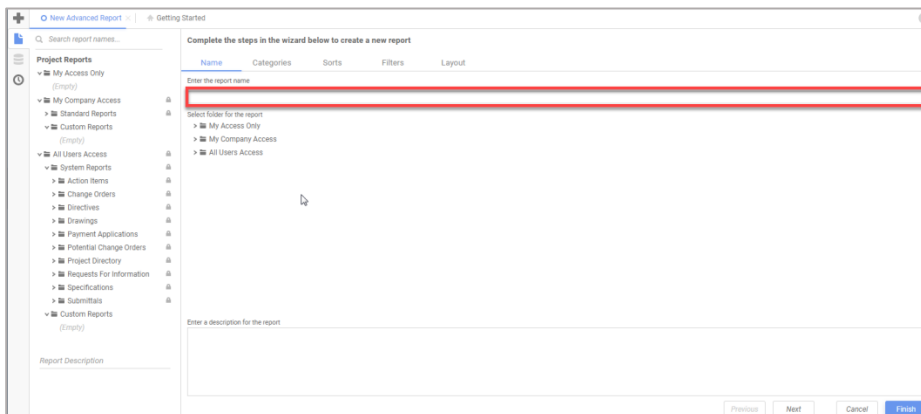


7. The User will be prompted to select the **Build** (type) report to be created.



- Express Report** – Quickly create tabular reports with essential operations like sorting, filtering and calculations. Easily format and summarize data.
- Advanced Report** – Create reports containing charts, maps, gauges, and images. Add group sections to provide more flexibility in how data is displayed.
- 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.

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

Name Categories Sorts Filters Layout

Enter the report name

Select folder for the report

- > My Access Only
- > My Company Access
- > All Users Access

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

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

Name Categories Sorts Filters Layout

Enter the report name

My new report

Select folder for the report

- > My Access Only
- > My Company Access
- > All Users Access

Enter a description for the report

Previous Next Cancel Finish

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.

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

Name Categories **Sorts** Filters Layout

Select categories to include on report

Search...

- Meetings - Invitees
- Payment Applications
- Payment Applications - Item Breakdown
- Potential Change Orders
- Potential Change Orders - Alternates
- Potential Change Orders - Cost Breakdown
- Potential Change Orders - Exclusions
- Potential Change Orders - Inclusions
- Product Video Tutorials
- Project Directory - Addresses
- Project Directory - Businesses
- Project Directory - Contacts
- Projects
- Punch List Items
- QRGs
- Report Templates
- Requests For Information
- Requests For Proposal
- Requests For Proposal - RFP Reviewers
- Requests For Proposal - Work Breakdown

+ Add

Suppress Duplicates

	Category Name
<input type="checkbox"/>	Projects
<input type="checkbox"/>	Requests For Information
<input type="checkbox"/>	Company Logo

Previous **Next** Cancel Finish

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.

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

Name Categories **Sorts** Filters Layout

Select sort fields

Requests For Information

Answer

Document_ID

Question

Subject

+ Add + Add Formula

Sort By

Sort By	Sort Order
Requests For Information Subject	Ascending

Previous **Next** Cancel Finish

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

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

Name Categories Sorts **Filters** Layout

Select filter fields to include on report

Requests For Information

Answer →

Document_ID

Question

Subject

Filter By

Requests For Information: Answer

Equal To

AND With Next Filter

Group With Next Filter

Prompt For Value

Summary

Requests For Information: Answer = Null

Previous **Next** Cancel Finish

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.

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

Name Categories Sorts **Filters** Layout

Select filter fields to include on report

Requests For Information

Answer →

Document_ID

Question

Subject

Filter By

Requests For Information: Answer

Equal To

AND With Next Filter

Group With Next Filter

Prompt For Value

Summary

Requests For Information: Answer = Null

Previous **Next** Cancel Finish

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

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

Name Categories Sorts Filters **Layout**

Select fields to include on report

Requests For Information

Answer →

Document_ID

Question

Subject

Data Field

Requests For Information: Subject

Requests For Information: Question

Requests For Information: Answer

Summary Function

f_x None

f_x None

f_x None

Summarize By

Requests For Information

Page Header

Page Footer

Grand Total

My new report

Subject	Question	Answer
Subject 1	Question 1	Answer 1
Subject 2	Question 2	Answer 2
Subject 3	Question 3	Answer 3
Subject 4	Question 4	Answer 4

Previous Next Cancel Finish

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.

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

Name Categories Sorts Filters **Layout**

Select fields to include on report

Requests For Information

Answers

Document_ID

Question

Subject

Summarize By

Requests For Information

Page Header Page Footer Grand Total

My new report

Subject	Question	Answer
Subject 1	Question 1	Answer 1
Subject 2	Question 2	Answer 2
Subject 3	Question 3	Answer 3
Subject 4	Question 4	Answer 4

Previous Next Cancel **Finish**

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

Run Report

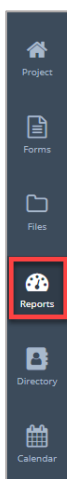
Export PDF

Section	A (Subject)	B (Question)	C (Answer)
Page Header	My new report		
Detail	Subject	Question	Answer
	Requests For Information Subject	Requests For Information Question	Requests For Information Answer

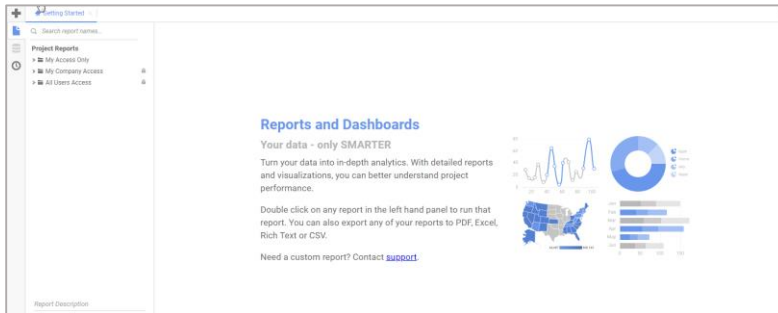
Edit and Formatting a Report

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.

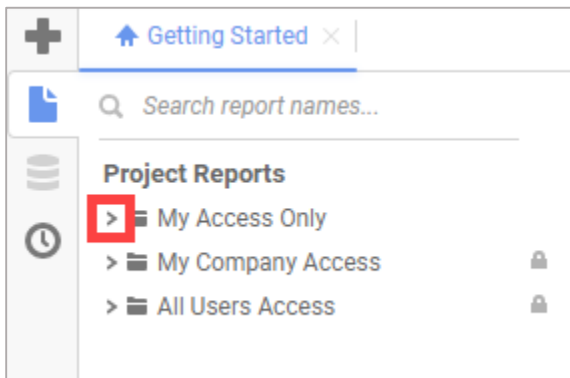
1. Click the **Reports** icon on the left navigation pane.



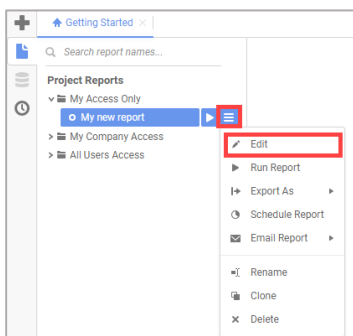
2. The reports pane will open.



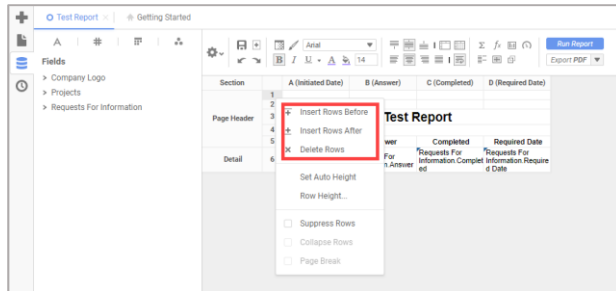
3. Click the arrow beside the folder containing the report to be modified to expand the report tree.



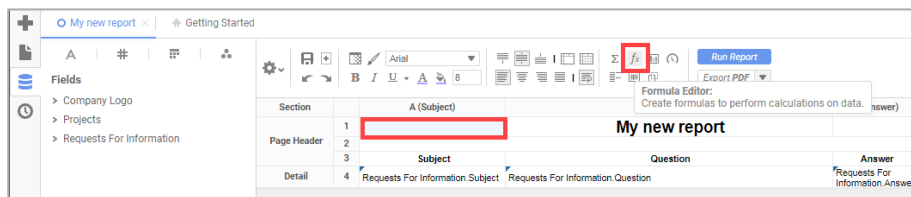
Click the **title of the report**, click the **three bars icon** and select **Edit**.



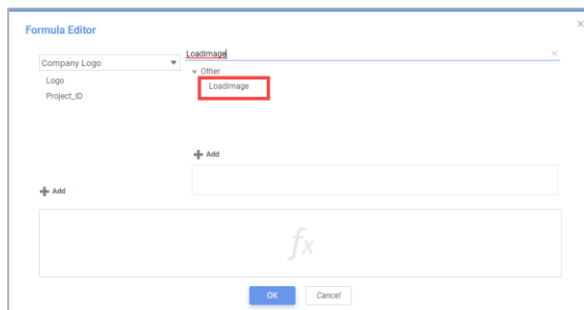
4. To insert or delete a row, click the **row number** and select **Insert Rows Before**, **Insert Rows After** or **Delete Rows**.



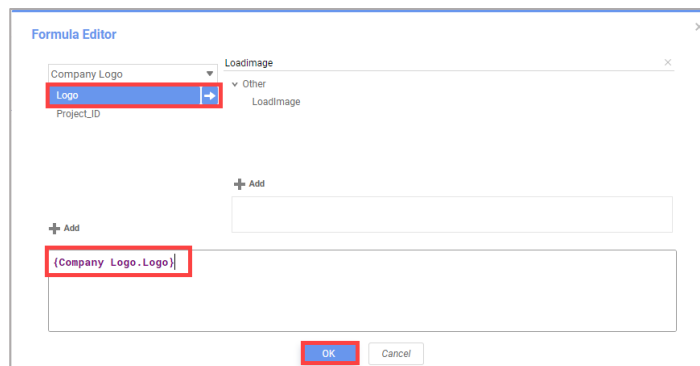
- To add the Company Logo, click **inside the cell** where the logo will reside and click the **function** key.



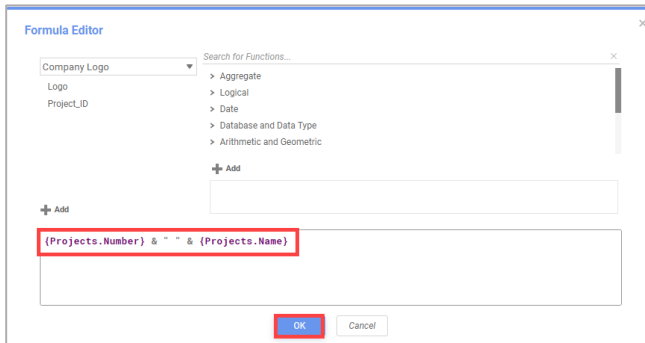
- In the Search for Functions field, type **LoadImage**. When function displays, double-click the **function** to add it to the function statement box.



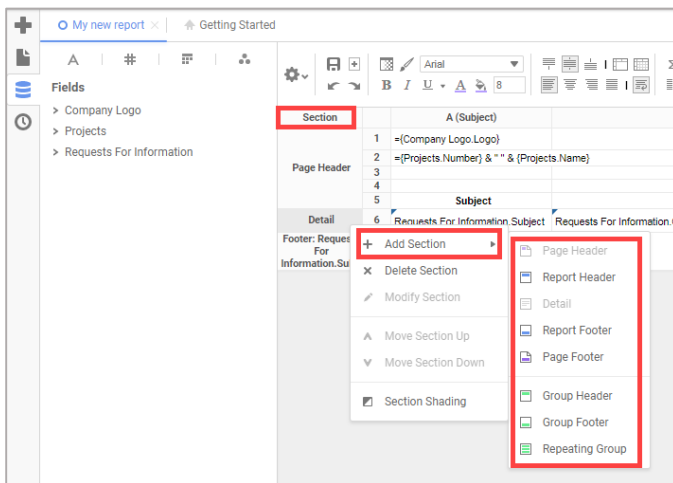
- In the field selector, double-click the **Logo** field to add to the function statement box and click the **OK** button to save the function.



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

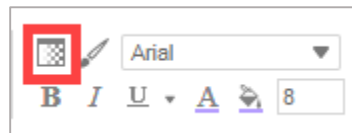
- i. **Page Header** – appears at the top of every page.
- ii. **Report Header** – appears at the beginning of the report.
- iii. **Detail** – appears once for each row of data returned during execution.
- iv. **Report Footer** – Contains summaries for the entire report and appears at the end of the 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.

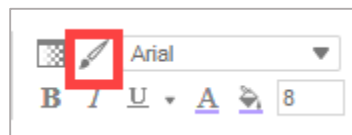
10. Basic formatting can be performed on the report using the formatting section at the top of the report. Select the cell(s) to be formatted and select the format from the toolbox below:



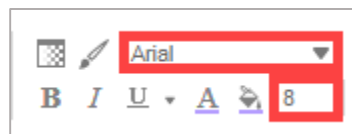
- a. Format cells



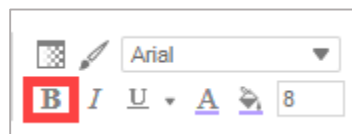
- b. Format print brush



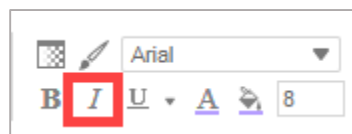
- c. Format font



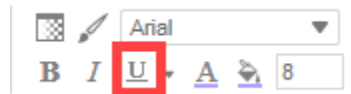
- d. Bold



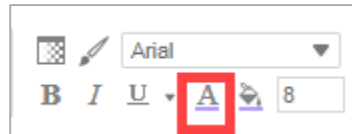
- e. Italic



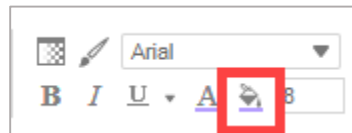
- f. Underline text



- g. Text color



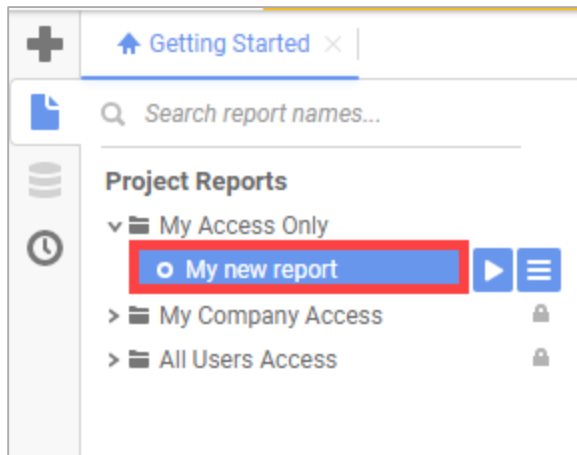
- h. Background color



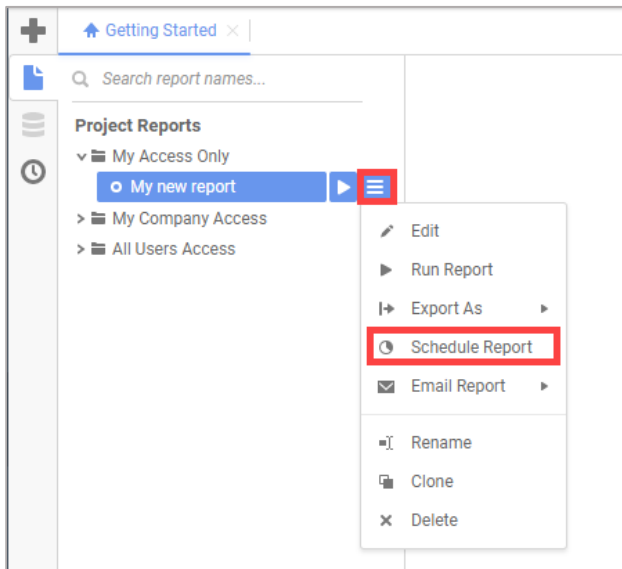
Scheduling Report

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.

The screenshot displays the 'Schedule Report' wizard with the 'Recurrence' tab active. The wizard title is 'Complete the steps in the wizard below to schedule a report'. The tabs are 'Recurrence', 'Filters', and 'Recipients'. The fields to be completed are:

- Schedule Name:** A text input field.
- Export Type:** A dropdown menu currently set to 'PDF'.
- Password (optional):** A text input field.
- Confirm Password:** A text input field.
- Execute Immediately:** A checkbox.
- Schedule Time:** A section containing a 'Schedule Time' field with a clock icon, a 'Repeat Every...' checkbox, and a frequency selector (1 hour(s), 0 minute(s), until).
- Recurrence Pattern:** A section with radio buttons for 'Once', 'Daily', 'Weekly', 'Monthly', and 'Yearly'. A 'Schedule On' field with a calendar icon is next to the 'Weekly' option.
- Range of Recurrence:** A section with a 'Start' field, a 'No end date' radio button, and two other options: 'End after 1 occurrences' and 'End by' with a date field.

At the bottom right, there are 'Previous', 'Next', 'Cancel', and 'Finish' buttons.

- a. Schedule Name.

A text input field labeled 'Schedule Name'.

- b. Export Type

Export Type **PDF** Password (optional) Confirm Password

☐ Execute Immediately

☐ Schedule Time

- 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.

☐ Execute Immediately

– Schedule Time

Schedule Time

☐ Repeat Every... hour(s) minute(s), until

- d. Recurrence Pattern

– Recurrence Pattern

☐ Once

☐ Daily

☒ Weekly

☐ Monthly

☐ Yearly

Recur every week(s) on:

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday

☐ Thursday ☐ Friday ☐ Saturday

- e. Range of Recurrence

– Range of Recurrence

Start

☒ No end date

☐ End after occurrences

☐ End by

4. Click **Next**.

The screenshot shows the 'Schedule Report' wizard with the 'Recurrence' tab selected. The left sidebar shows 'Project Reports' with 'My new report' selected. The main area contains the following fields and options:

- Schedule Name:** My Scheduled Report
- Export Type:** PDF (optional password and confirm password fields)
- Execute Immediately:** checkbox
- Schedule Time:** 01:00 pm, Repeat Every 1 hour(s) 0 minute(s) until [date]
- Recurrence Pattern:**
 - Once, Daily, Weekly (selected), Monthly, Yearly
 - Recur every 1 week(s) on: Sunday, Monday, Tuesday, Wednesday (checked), Thursday, Friday, Saturday
- Range of Recurrence:**
 - Start: 05/15/2019
 - No end date, End after 1 occurrences, End by [date]

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

- 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**.

The screenshot shows the 'Schedule Report' wizard with the 'Filters' tab selected. The left sidebar is the same. The main area contains:

- Select filter fields to include on report:** Company Logo, Logo, Project_ID
- Filter By:** Requests For Information Answer
- Filter Conditions:** Equal To, AND With Next Filter, Group With Next Filter
- SUMMARY:** Requests For Information Answer = Null

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

- 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**.

+

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