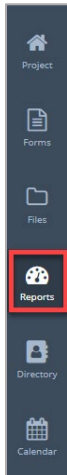


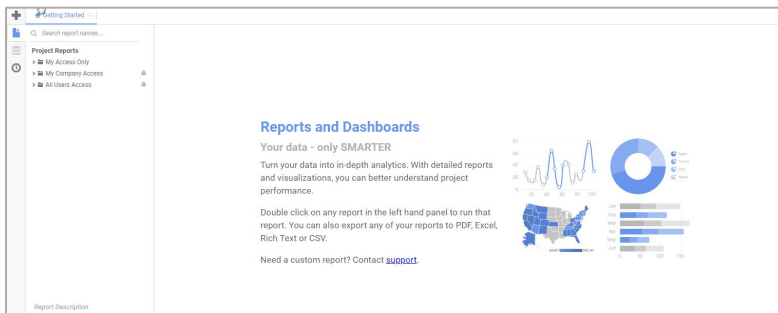
Reports

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.

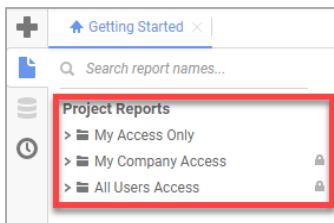
1. Click the **Reports** icon on the left navigation pane.



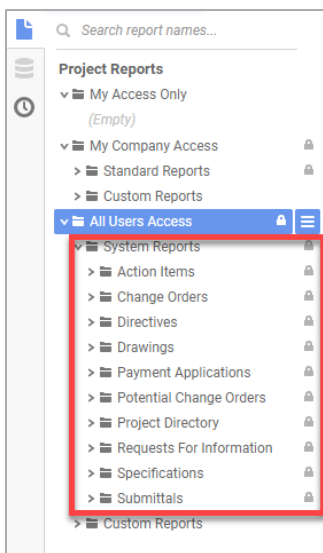
2. The reports pane will open.



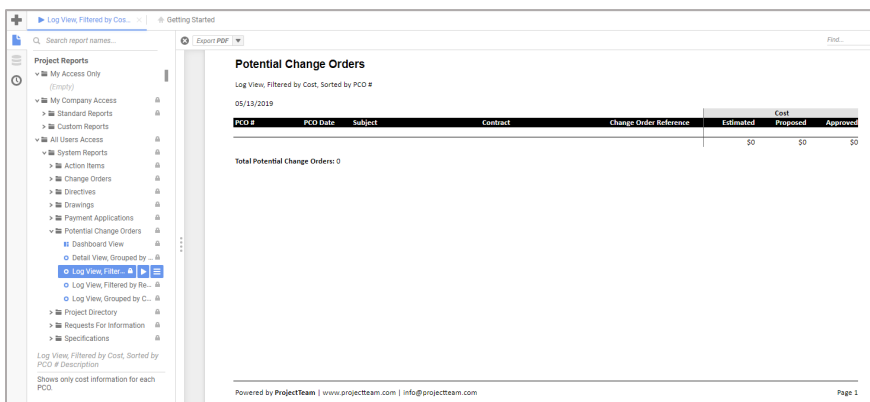
3. There are three folders contained in the reports tree.
 - a. **My Access Only** – contains reports you are currently working on and are accessible to the User only.
 - b. **My Company Access** – Reports that are ready to use on the project and accessible to all users for your company.
 - c. **All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



- 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.

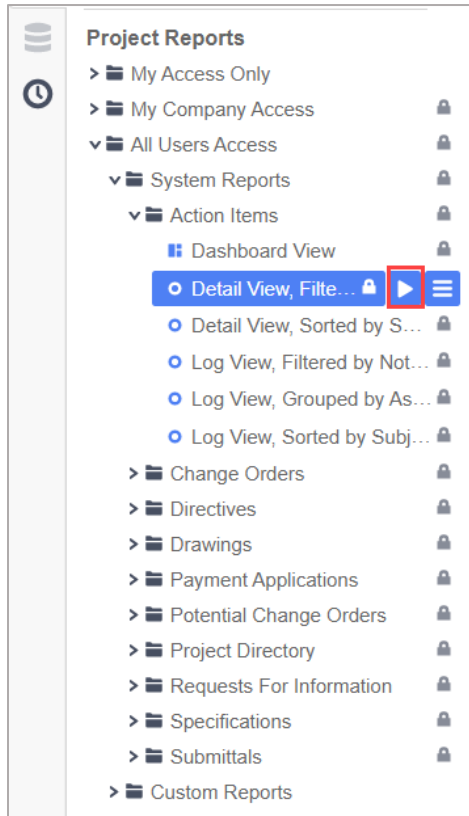


- Although any user can run any **System Report**, they **must** have access to the form data to generate the report. If they do not have access to the data contained in the report they will only receive a blank report.



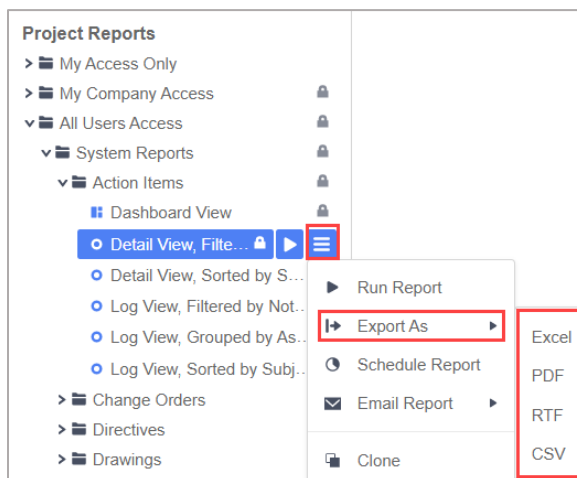
Running a Report

1. Open the folder where the report resides, **double click the report title** OR **click the arrow** beside the report title to run the report.



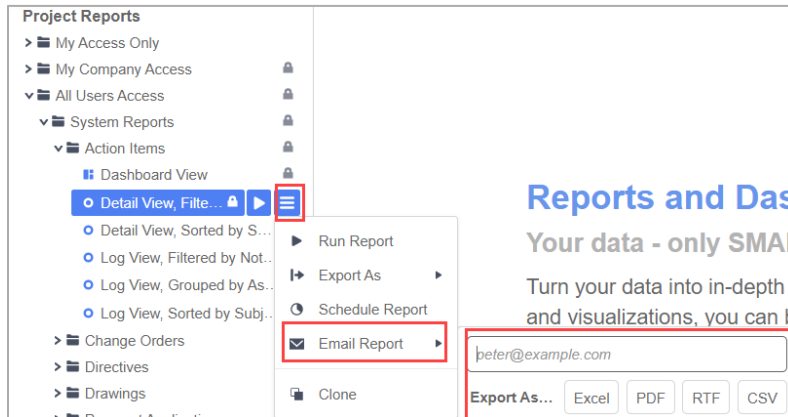
Export the Report

1. Click the **three bar icon** next to the report title, select **Export As** and select the **file type**.



Email A Report

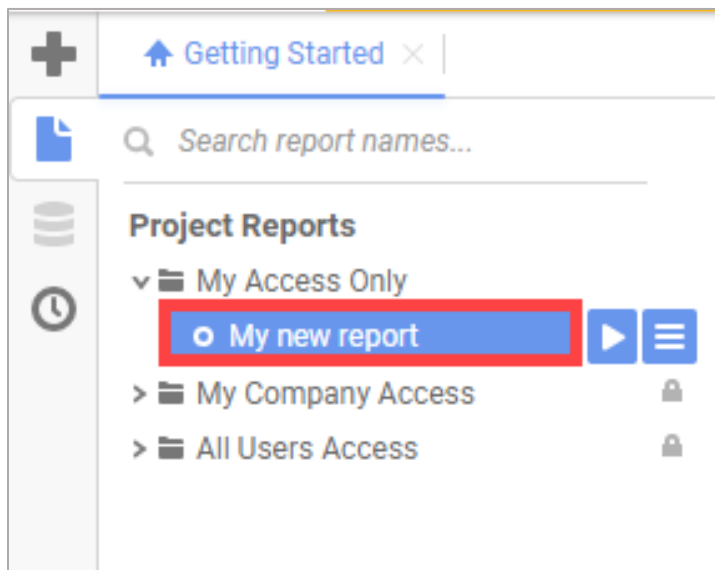
1. Click the **three bar icon** next to the report title, select **Email Report**, enter the **recipient's email address** and select the **file type**.



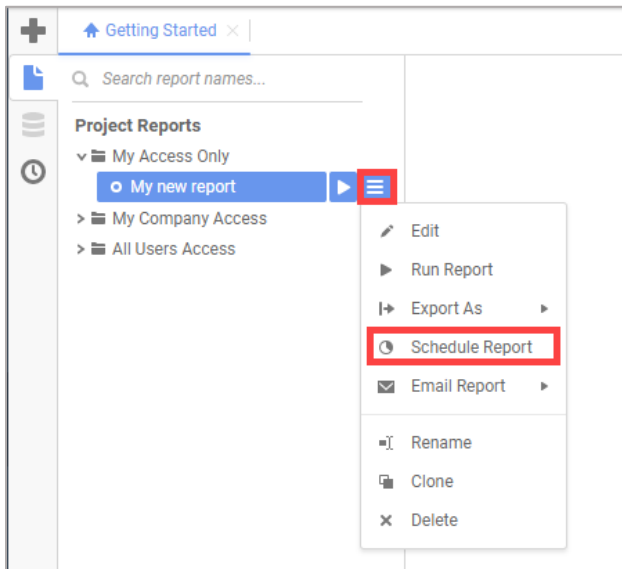
Scheduling Report

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.



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



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

The screenshot shows the 'Schedule Report' wizard with the 'Recurrence' tab selected. The wizard contains the following fields and options:

- Schedule Name:** A text input field.
- Export Type:** A dropdown menu set to 'PDF'.
- Password (optional):** A text input field.
- Confirm Password:** A text input field.
- Execute Immediately:** A checkbox.
- Schedule Time:** A text input field.
- Repeat Every:** A section with '1' in the 'hour(s)' field and '0' in the 'minute(s)' field, followed by 'until' and a date picker.
- Recurrence Pattern:** Radio buttons for 'Once', 'Daily', 'Weekly', 'Monthly', and 'Yearly'. The 'Once' option is selected.
- Schedule On:** A date picker.
- Range of Recurrence:** A section with 'Start' and a date picker, and three options: 'No end date' (selected), 'End after 1 occurrences', and 'End by' with a date picker.
- Navigation:** 'Previous', 'Next', 'Cancel', and 'Finish' buttons at the bottom right.

- a. Schedule Name.

The screenshot shows a close-up of the 'Schedule Name' text input field, which is currently empty.

- 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

3. Click **Next**.

The screenshot shows the 'Schedule Report' wizard with the 'Recurrence' tab selected. The left sidebar shows a tree view of report categories: 'Project Reports' (expanded), 'My Access Only', 'My Company Access', and 'All Users Access'. The main area contains the following fields and options:

- Schedule Name:** My Scheduled Report
- Export Type:** PDF (dropdown)
- Password (optional):** (text field)
- Confirm Password:** (text field)
- Execute Immediately:** (checkbox, unchecked)
- Schedule Time:** 01:00 pm
- Repeat Every:** 1 hour(s), 0 minute(s), until (dropdown)
- Recurrence Pattern:**
 - Once** (radio button)
 - Daily** (radio button)
 - Weekly** (radio button, selected)
 - Recur every 1 week(s) on:
 - ☐ Sunday
 - ☐ Monday
 - ☐ Tuesday
 - ☒ Wednesday
 - ☐ Thursday
 - ☐ Friday
 - ☐ Saturday
 - Monthly** (radio button)
 - Yearly** (radio button)
- Range of Recurrence:**
 - No end date** (radio button, selected)
 - End after:** 1 occurrences
 - End by:** (date field)

At the bottom right, there are four 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 as in the previous screenshot. The main area contains the following fields and options:

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

At the bottom right, there are four 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