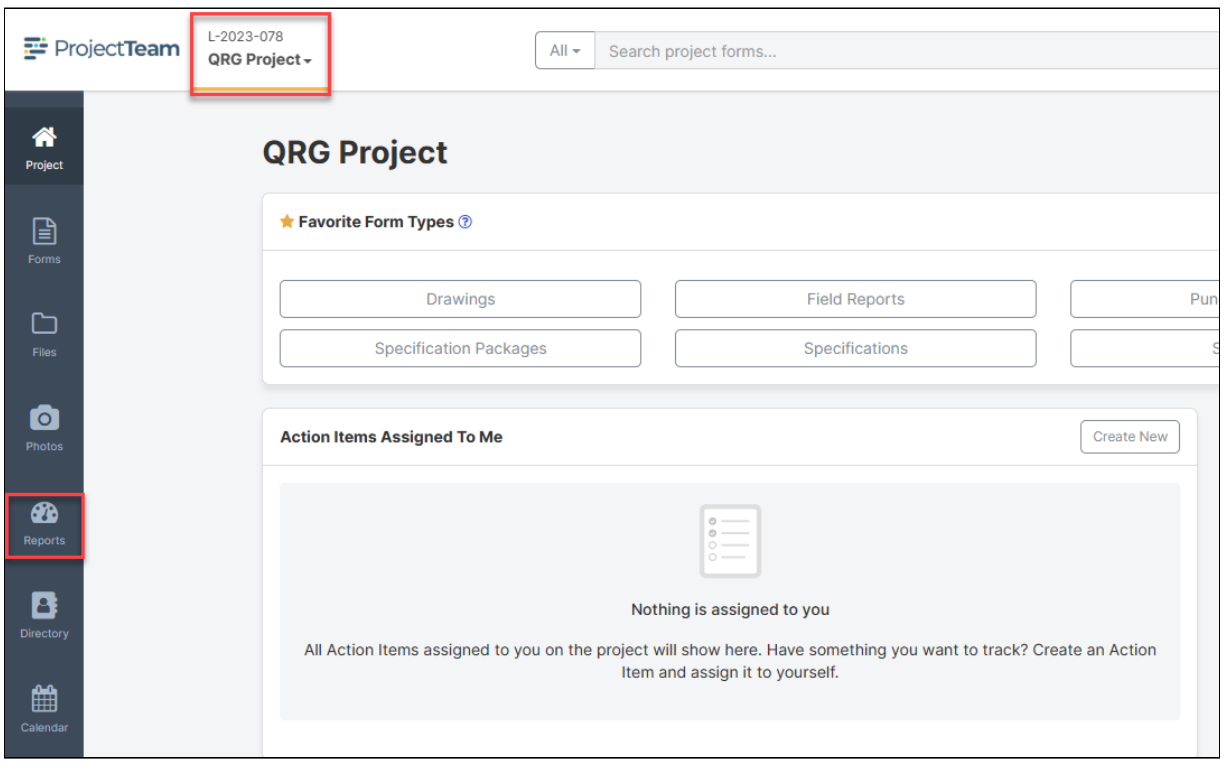
Running Reports

Built-in report and dashboard tools make it easy to turn flat data into actionable insights.

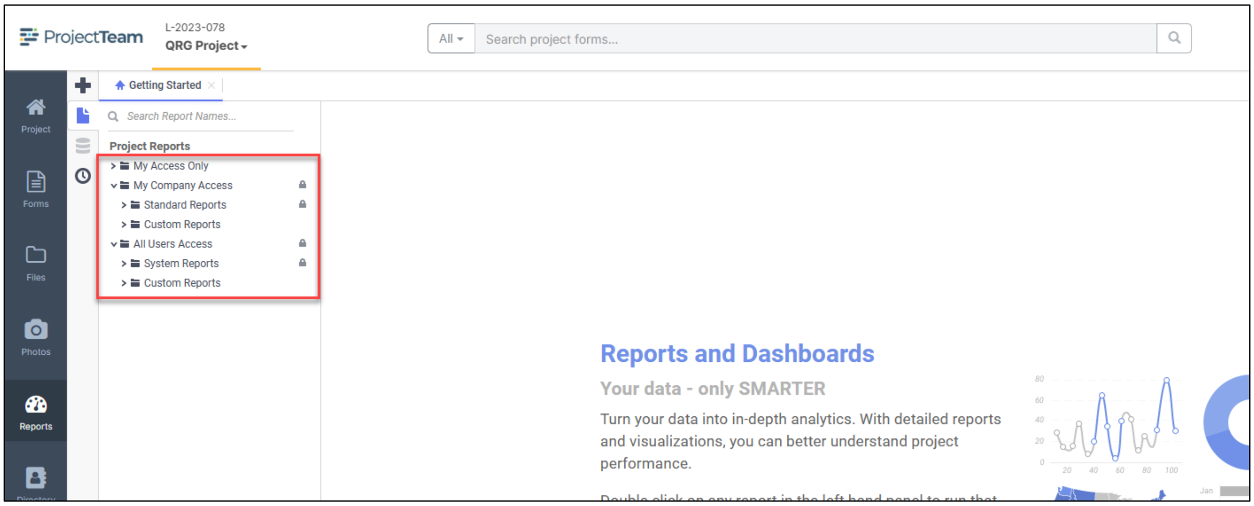
Reports Home Page

1. Open the project.
2. After navigating into a project, you'll see the left sidebar in any page shows icons for the major areas of functionality of ProjectTeam. One of those icons is for Reports.



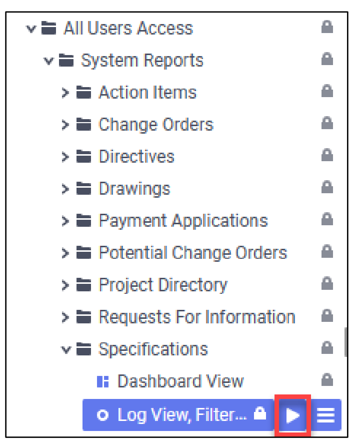
3. Clicking on the **Reports** icon will take you to the reporting home page. On the left side of the screen, a navigation panel is shown with three root folders.

- **My Access Only**: This folder is private to you. If you put any reports into this folder, no other users on the project will be able to view those reports but you.
- **My Company Access**: This folder is visible to all users from your company that are also on the project. ***Standard Reports*** will be the same for all Company projects and ***Custom Reports*** may be *project or program specific*.
- **All Users Access**: This folder is visible to all users on the project regardless of the company. ***System Reports*** are standard for every ProjectTeam project and ***Custom Reports*** may be *project or program specific*.



Preview a Report

4. With the **Report** home page open, find the report within the folders.
5. Click on the report and then the **Run Report** icon to open a preview of the report.



NOTE: Data access is based on the information you have access to on actual forms. Therefore, depending on form and field access, two users running the same report may see different results.

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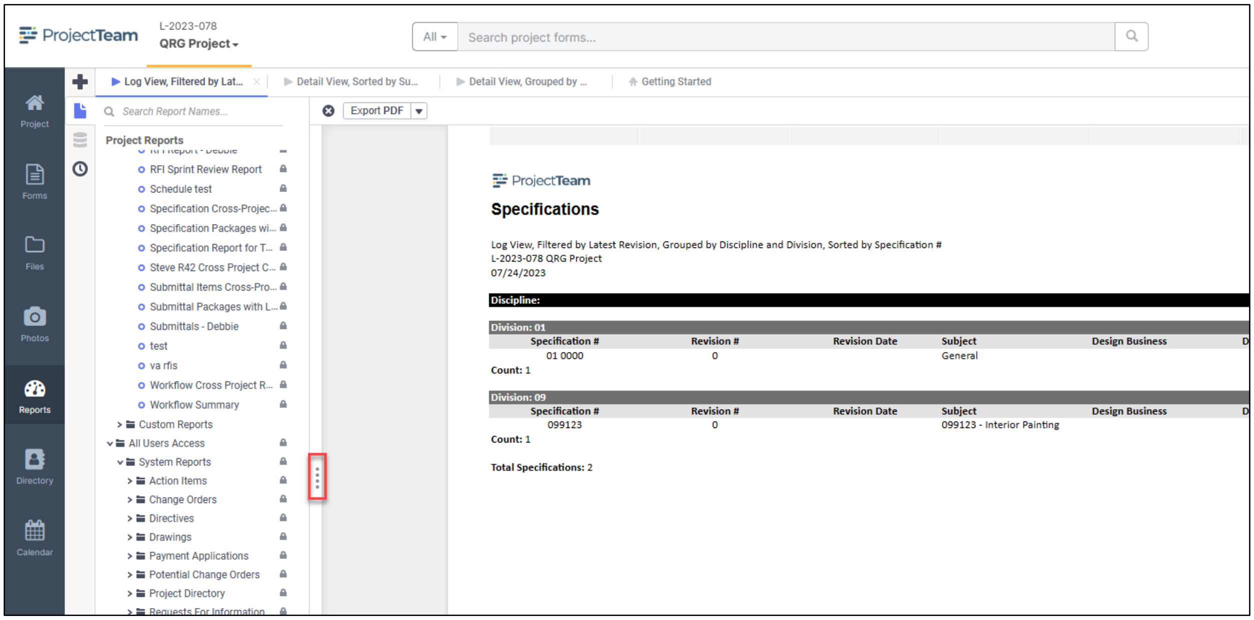
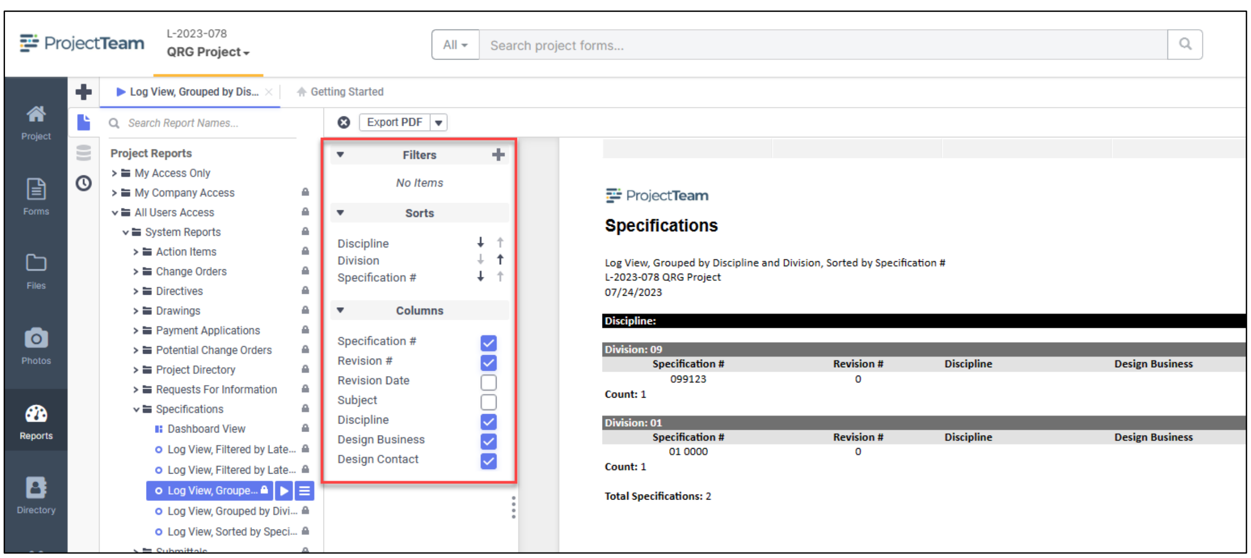
Choose Filters, Sorts, or Columns for a Report

Some reports are set up to allow you to edit the output format by selecting Filters, Sorting by specific Columns, or choosing which Columns to show.

6. After you have opened the Report Preview, click on the 4 dots between the 2 panes to open the options.



7. Select any applicable **Filters** from the dropdown options.
8. Click on the Up/Down arrows to determine if a Columns should **Sort** Ascending or Descending.
9. Check/Uncheck by **Columns** to show or hide.



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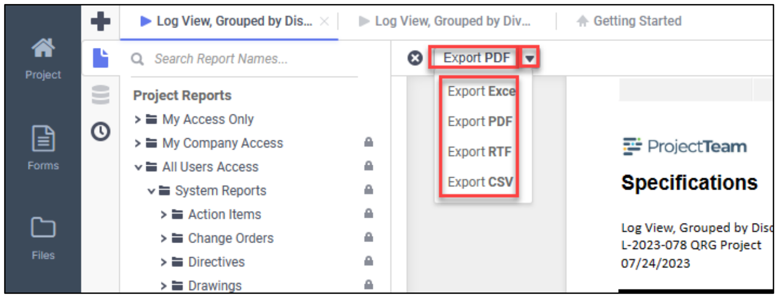
Export a Report

Reports can be Exported out of ProjectTeam for distribution.

10. At the top of the **Report Preview** click on the default *export type* or the drop down arrow to select a different type.

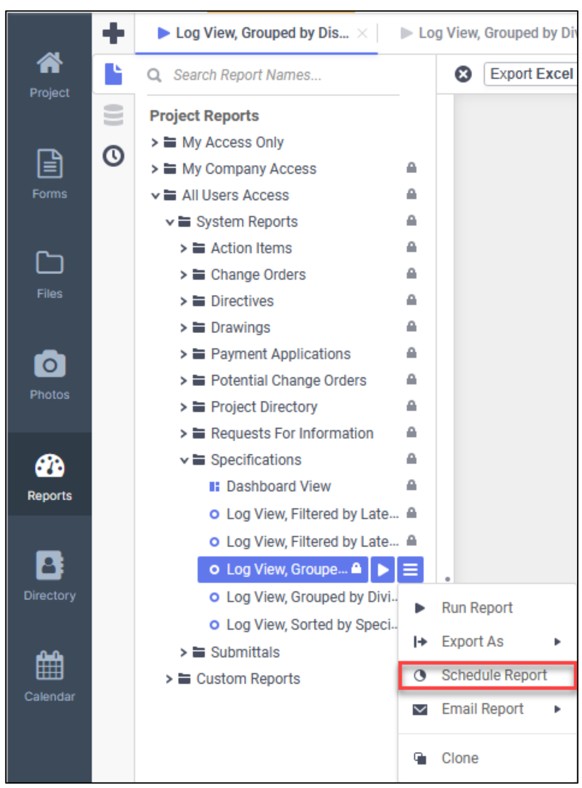


NOTE: The report will be saved to your computer's Download folder in File Explorer.

Scheduling Report

Reports can be scheduled to email to a select group of users or email addresses on a daily, weekly, or monthly basis.

1. With the **Report** home page open, find the report within the folders.
2. Click on the *3 bar icon* and select **Schedule Report**.



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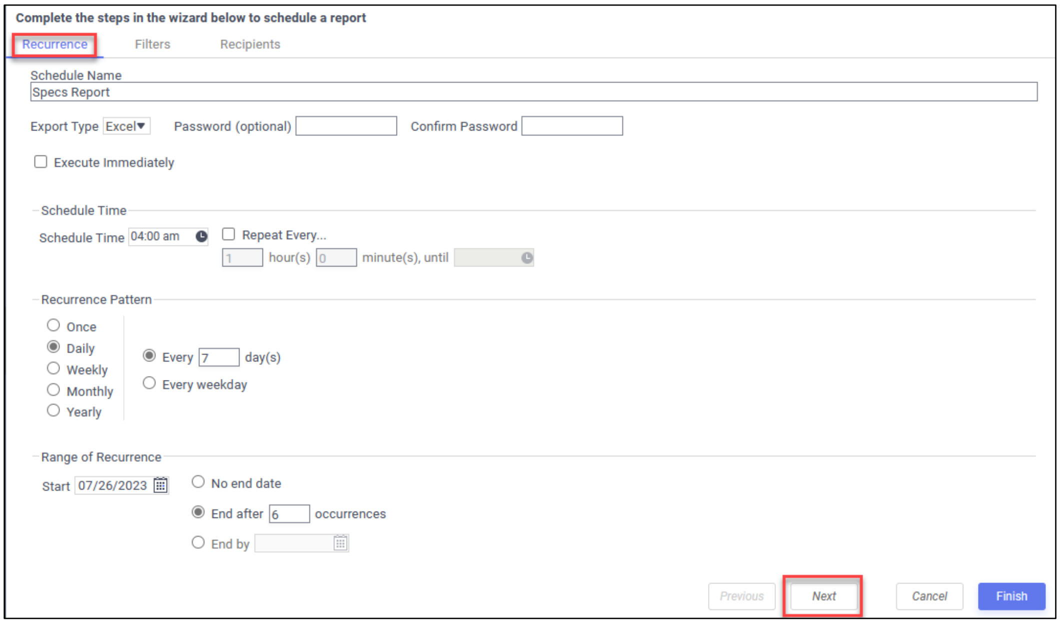
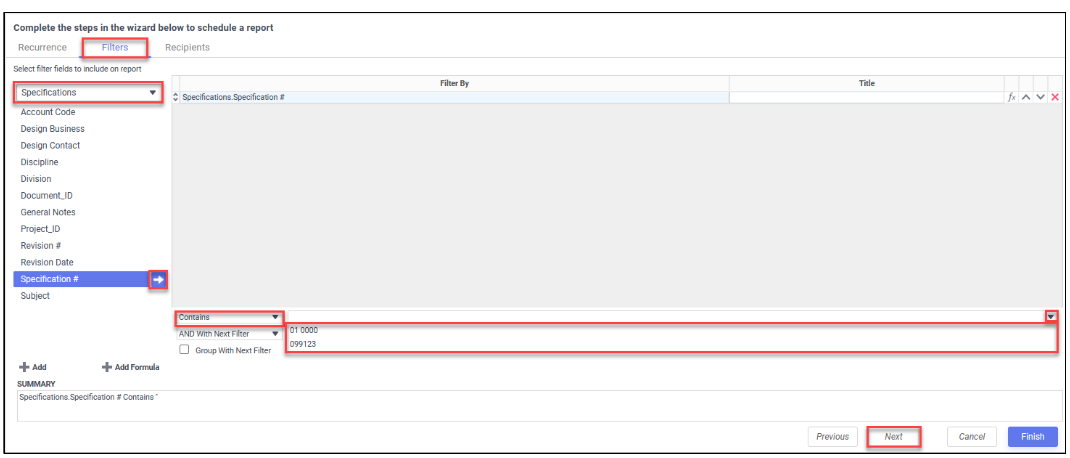
3. The report schedule pane will open to the **Recurrence** tab. Complete the following fields on this tab.
   a. Schedule Name
   b. Export Type
   c. Check the **Execute Immediately** to email upon saving the schedule OR Enter the **Scheduled Time** the reports is to email and if you want it to repeat 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**.



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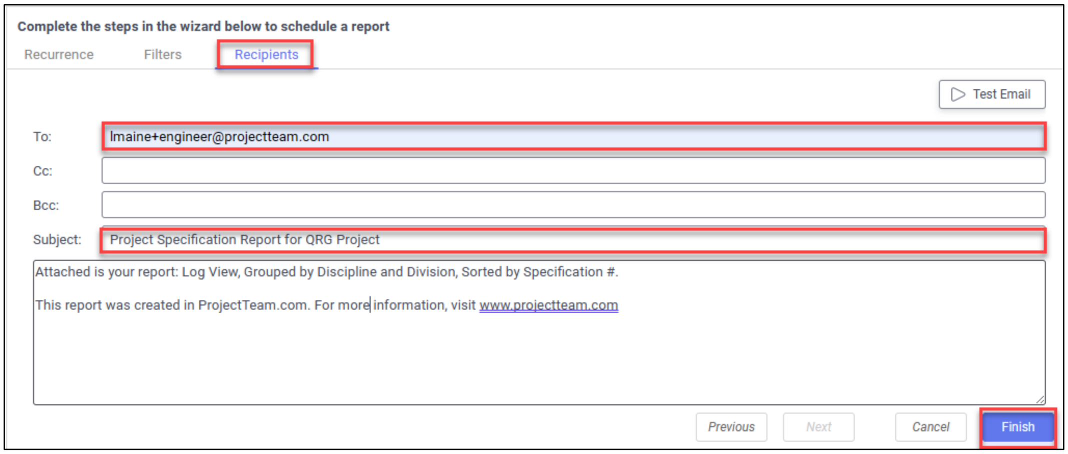
6. The **Recipients** tab will open. Enter email addresses in the **To**, **CC**, and **BCC** fields and add any text necessary to the body of the email. Click **Finish**.



Related Resources

Help Center Links
[Navigating Report folders in projects (projectteam.com)]
[Reports & Dashboards - Help Center Home (projectteam.com)]

Quick Reference Guides (QRGs) and Training Videos
Sharing Records
File Management Overview
Photo Management
Creating RFIs
Creating Submittals
Creating Drawings and Packages
Creating Meeting Minutes
Creating Daily Reports
Creating Punchlists

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