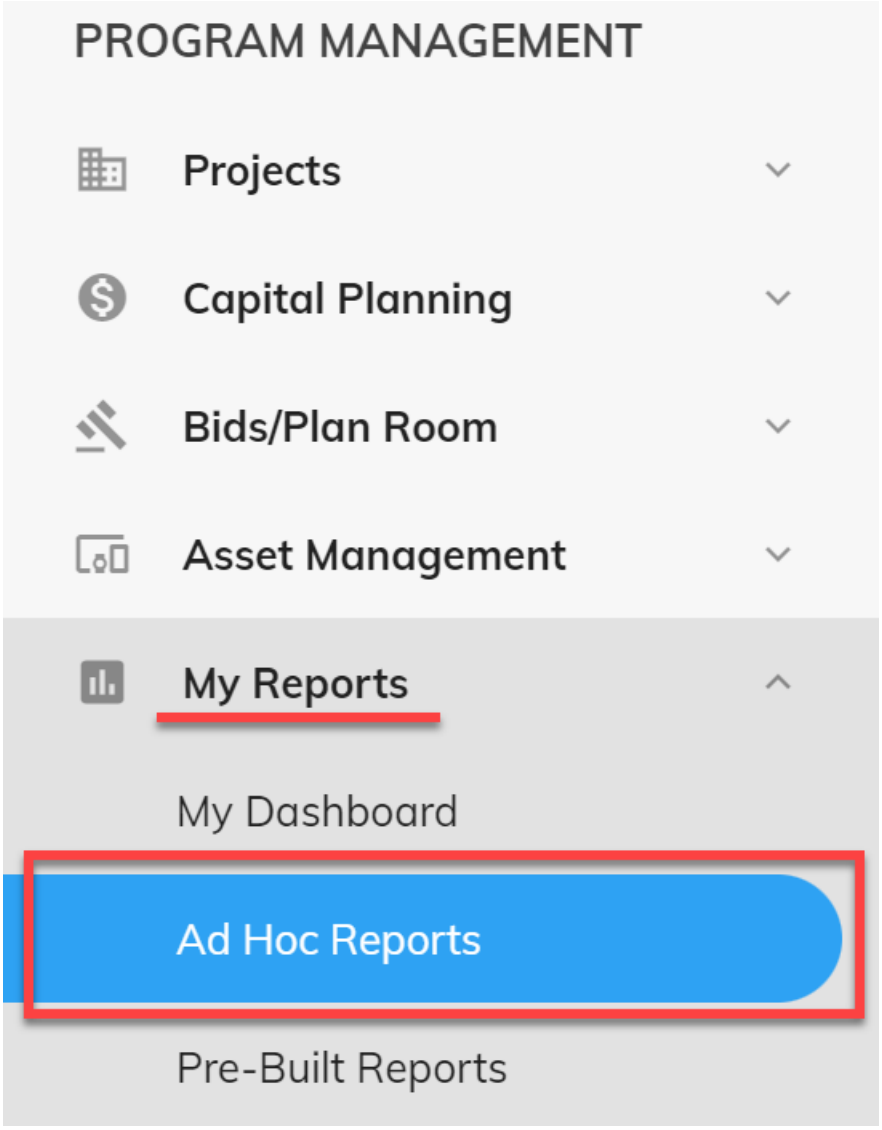
AD HOC REPORTING

Navigating Ad Hoc Reports

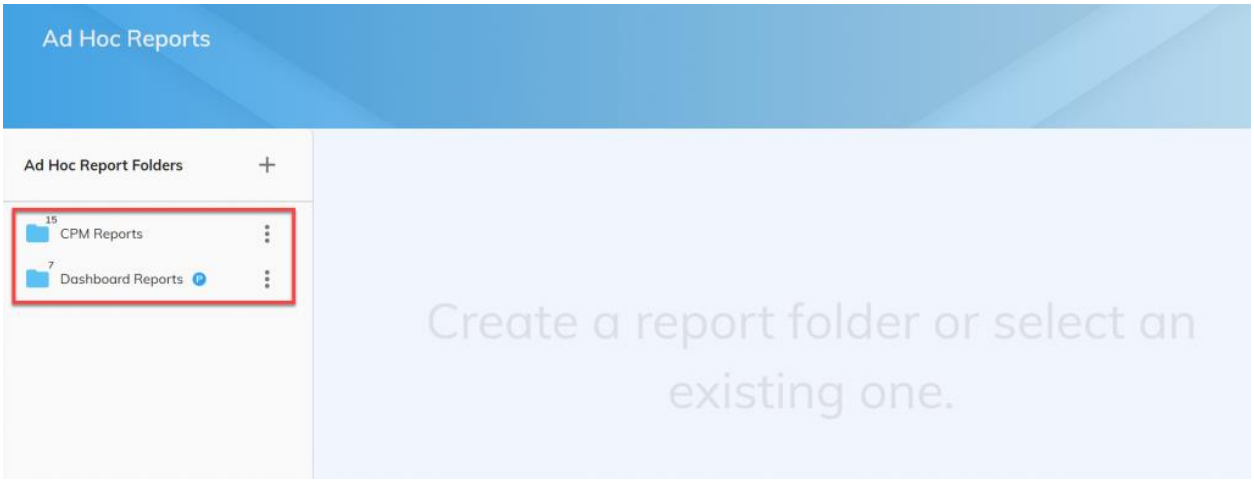
Note: Access rights to Reports tools are assigned by site admins. If you need to access reporting and are not able to see these tools, you should contact your site admin.

Ad Hoc Reports tool can be accessed from the navigation pane located on the left side of the screen.

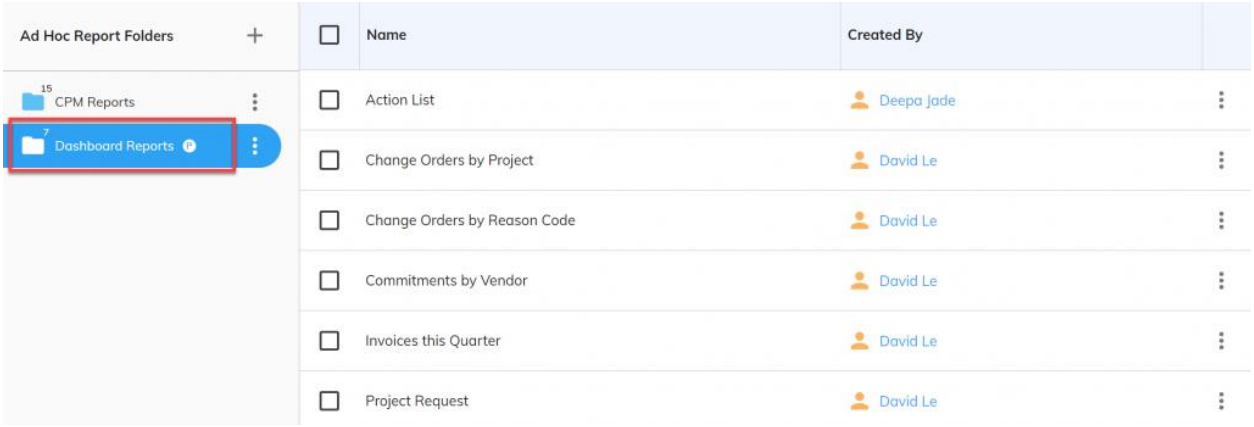
1. To access Ad Hoc Reports: **My Reports > Ad Hoc Reports**



2. The first screen you will see will be blank and your **Report Folders** will be listed on the left.



3. Click on a folder name to view its contents.



4. Click on a report row to **Run** (Open) the report.

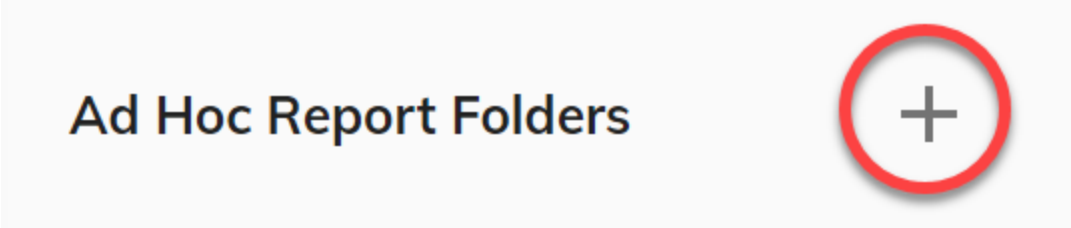
Note: Clicking or Opening a report will "Run" the report for you. This will not take you to "Edit" the report.

Creating Folders

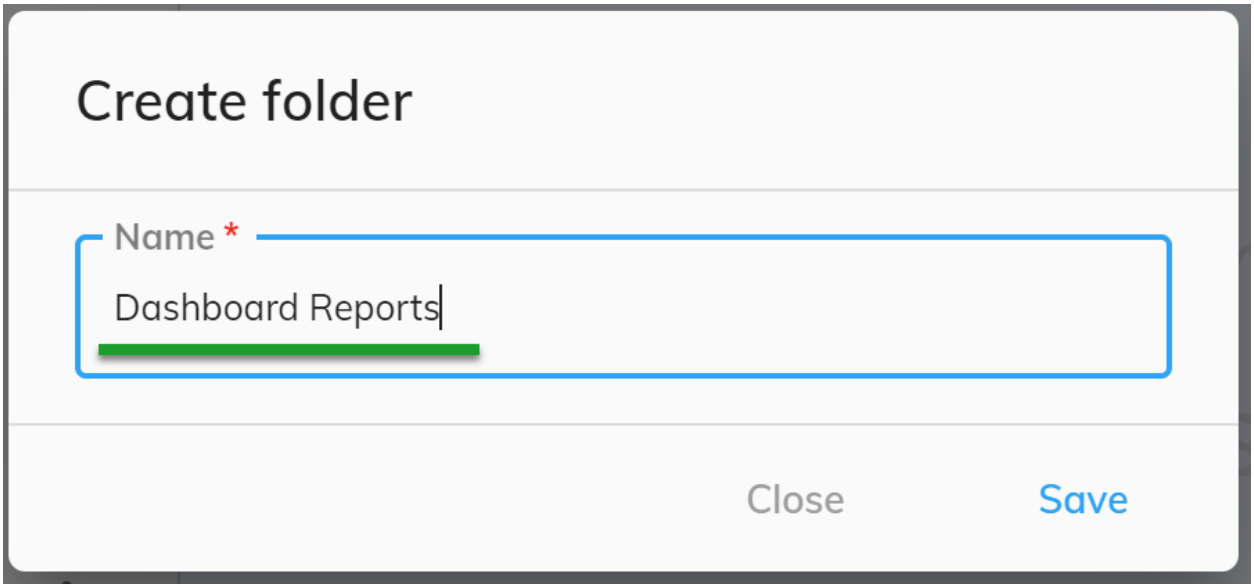
Creating a folder is a necessary step before creating a report. You will only be able to create a report from inside a folder.

To create a folder:

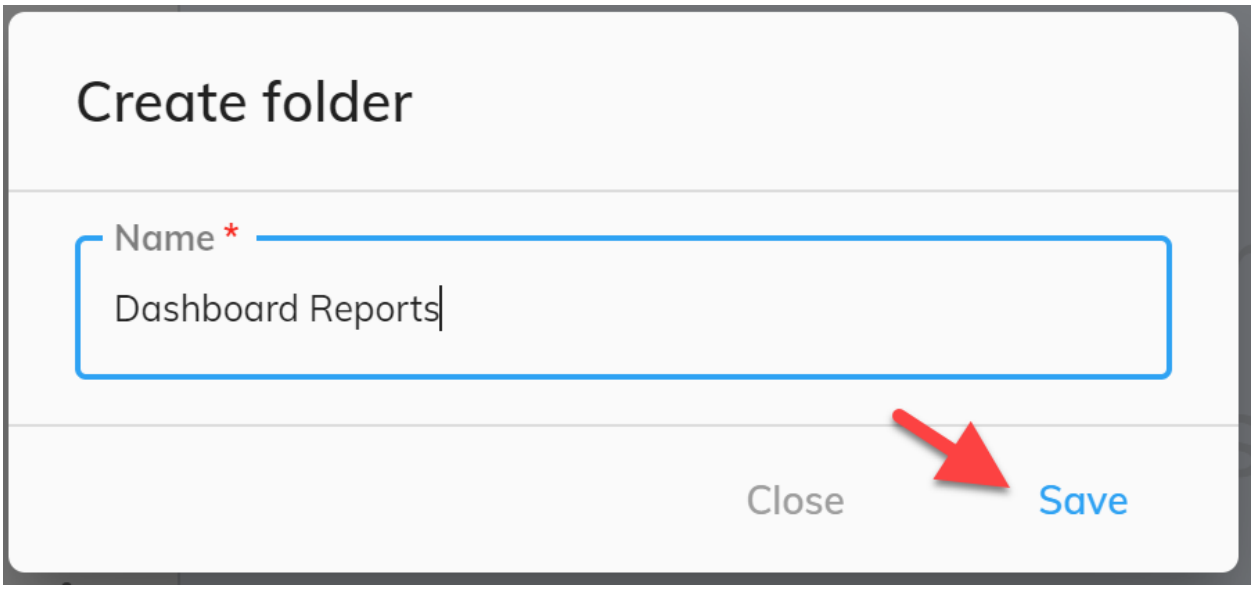
1. Click on the **+** located at the top of the report folders pane.



2. Add a name to this report.

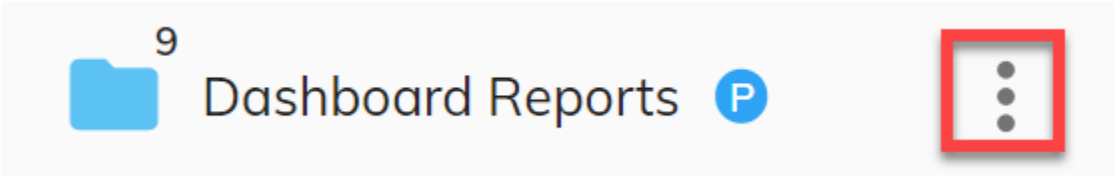


3. Click **Save** when done.

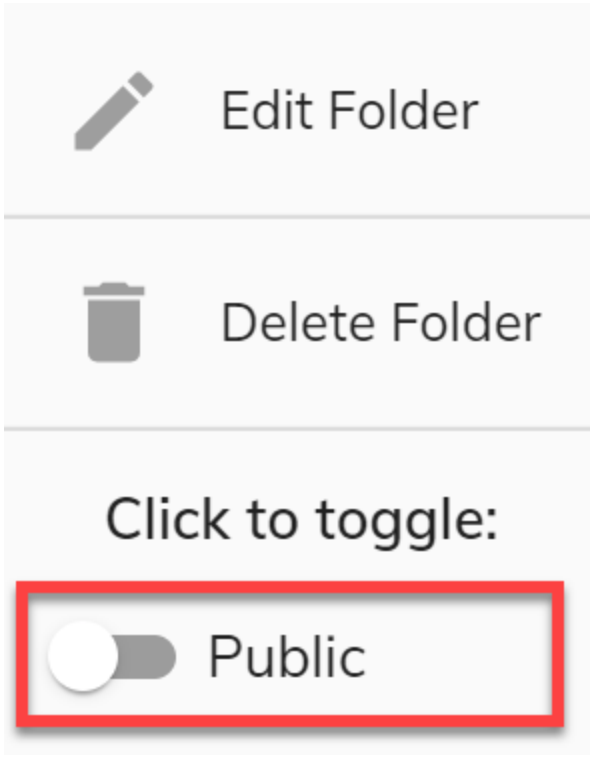


4. Folder Options:

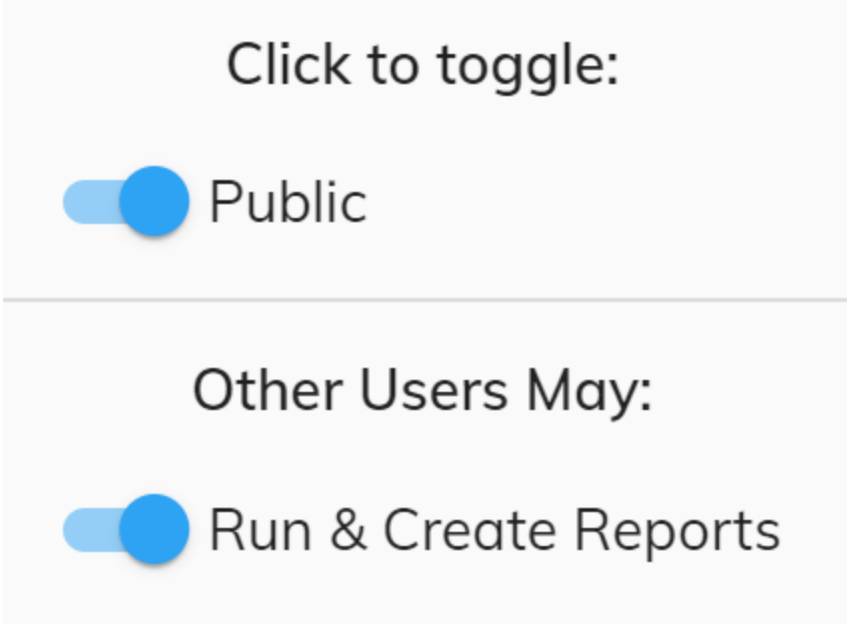
a. Click on the three dots next to the folder name to view folder options.



b. Folders are **Private** by default.
c. Folders can be made **Public** (denoted by "**P**" next to the folder name).
d. Click the toggle to switch between Private or Public options.



v. Choose the level of rights you'd like to give the collaborators using the next toggle. You can allow users to "run reports" or "run and create reports."



Creating And Running Reports

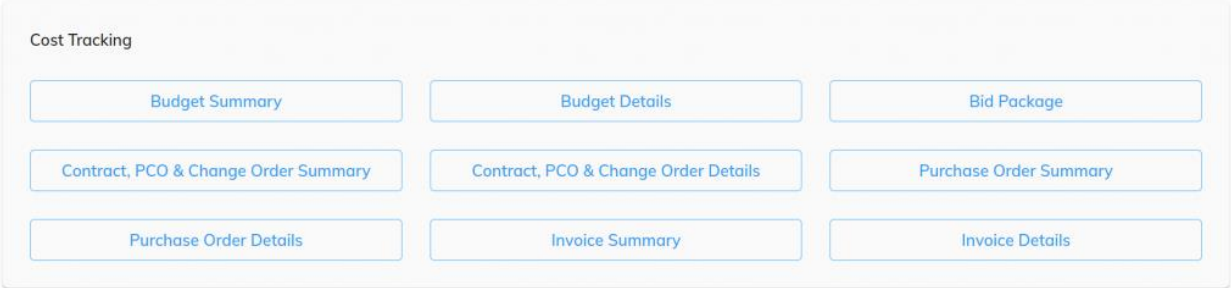
You have to be inside a folder in order to create a report.

1. Select the folder you want to create a report in.

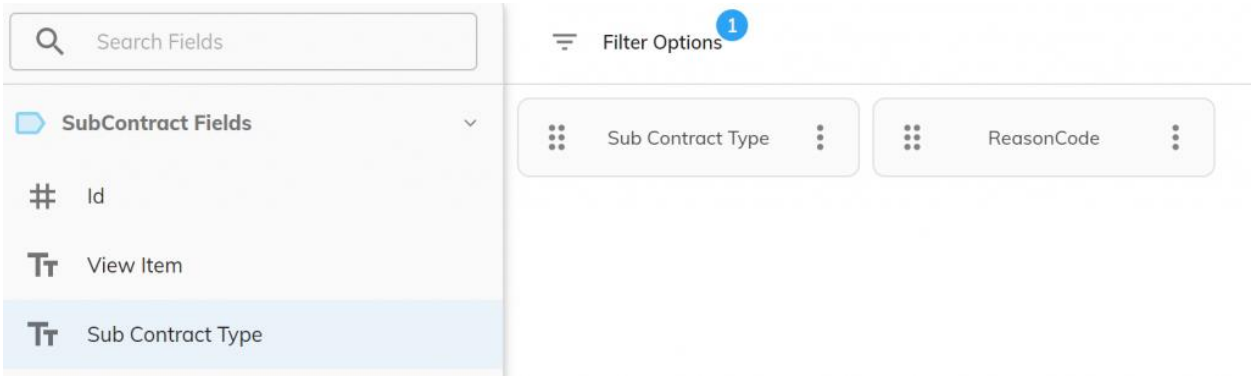
Note: a report can be copied or moved into another folder at a later date if needed.

2. Click **+ Report** located at the top right corner of your screen to begin creating a report.
3. **Select Report Type:**
    - Selecting a report type defines the further report building options.
    - There are four main categories: Cost Tracking, Workflow, Other and Custom Apps.
    - Each category has multiple report types under it.
    - Click on the type of report you want to create to get started.

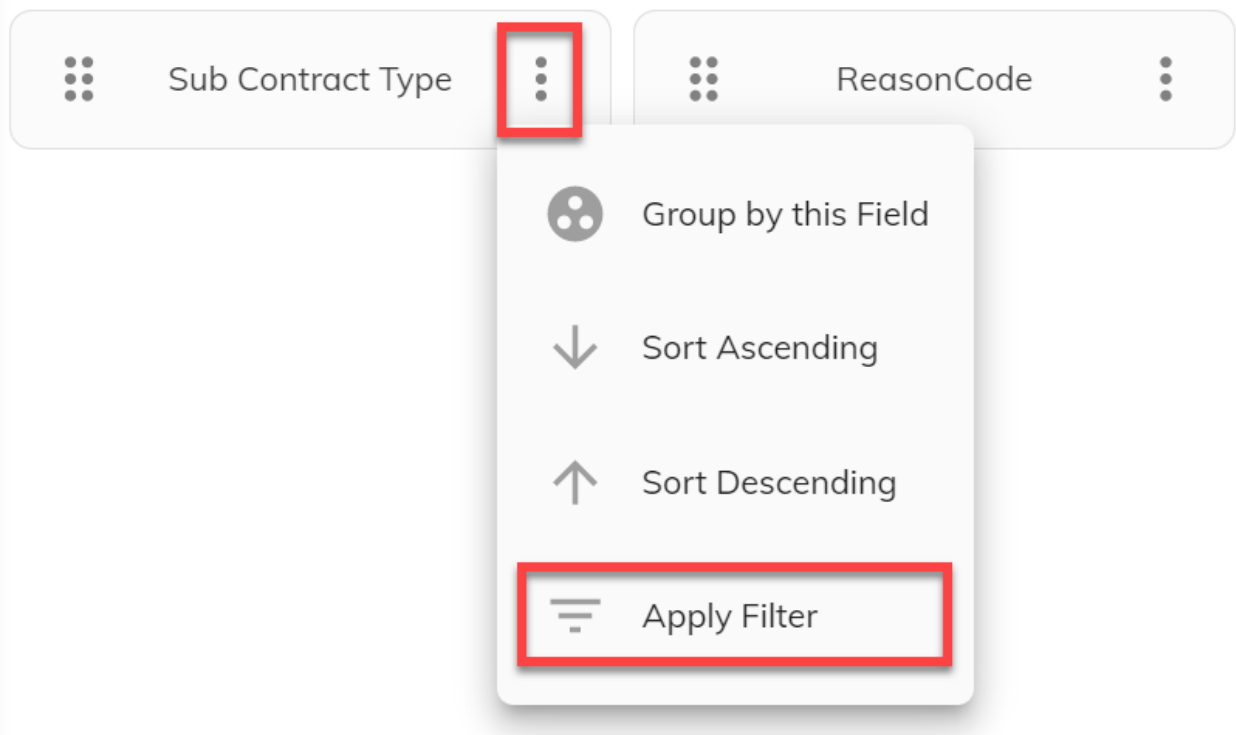
Here's an example of the Cost Tracking category:



4. **Build Report:** All data fields categorized into groups will appear on the left.
    a. Groups are divided into module details and project attributes. Click on a group to expand options.
    b. To add a field to the report, click on a field or drag-and-drop into the section on screen.
    c. All selected fields will appear in the right section and will appear highlighted in blue in the fields list.



1.
    d. Adding **Filters:**
        a. Method 1: Click on **Filter Options** to add Filters to the report.
        b. Method 2: Click on the three dots next to the field name and click "**Apply Filter.**"



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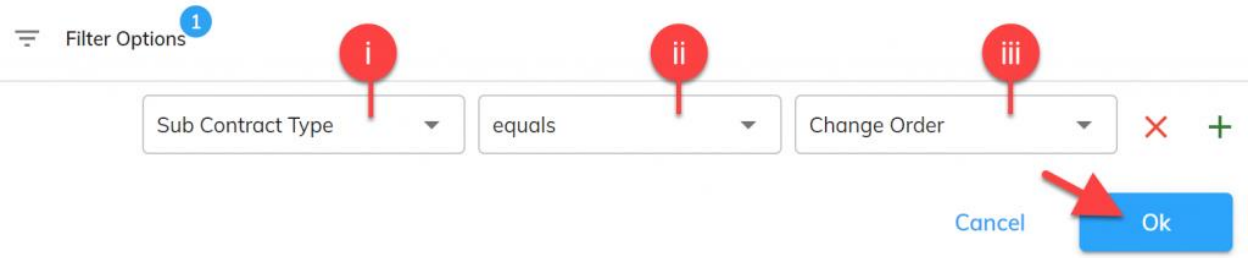
      i. Select a field.
      ii. Select a condition (conditions will vary based on field type).
      iii. Define the condition.
      iv. Click **Ok** to add the filter.



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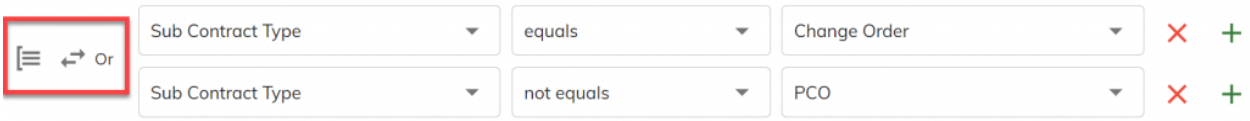
      v. You can add more filters by clicking the **Plus** icon.

vi. You can remove an unwanted filter by clicking the **X** icon.



1.
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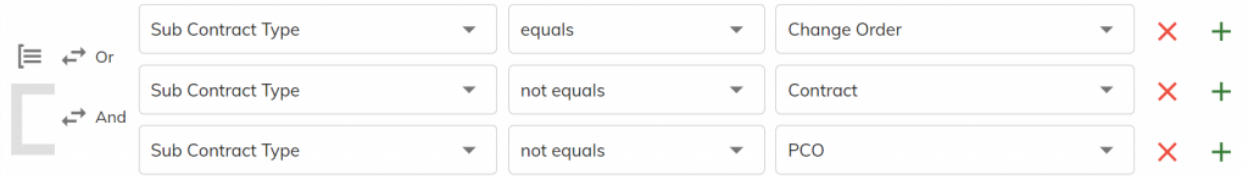
        1.

v. Using Filter Logic:

- Filter logic uses filters and operators to produce data results that you specify.
- Operators: There are two operators that give you a lot more control over how the filter streamlines your data.
    1. **And** – This means that if the filter before and after are true, then the data will be included in the report.
    2. **Or** – This means that if either filter, before or after, is true, then it will be included in the report.
- Advanced Filters: Use **Parenthesis** to group filters in different ways. For example, to view menu selections of pizza, or hamburgers and fries, you would write: pizza or (hamburgers and fries).

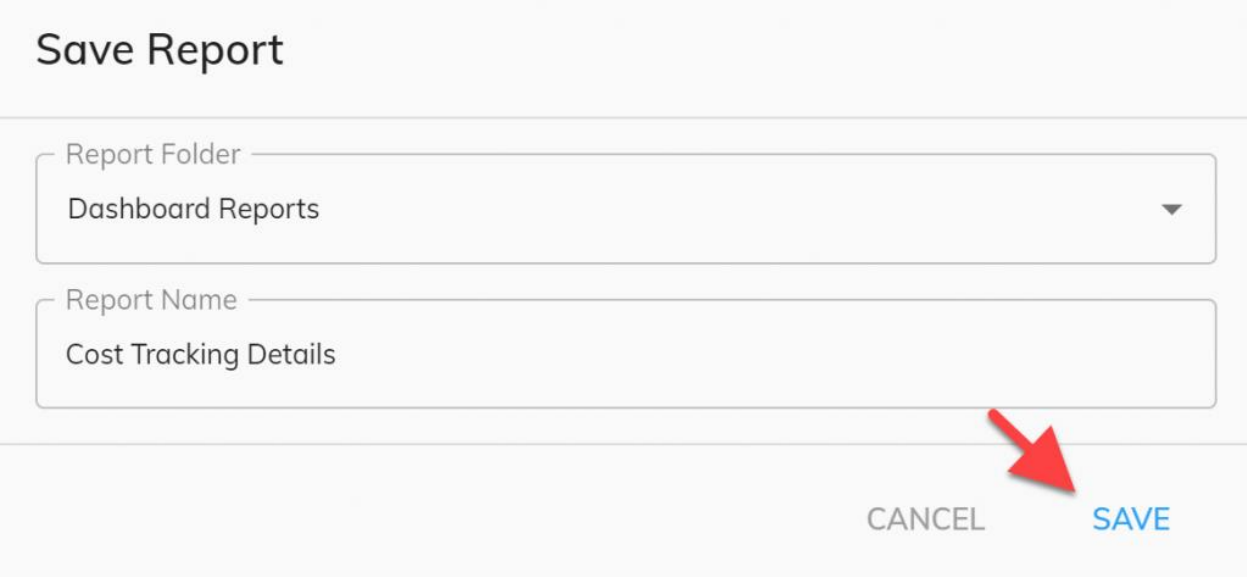
The following are a few useful examples of applying filter logic:

- 1 and 2
- 1 or 2
- 1 and (2 or 3)
- (1 and 3) or 2
- 1 and 2 and 3
- 1 or 2 or 3



Here the condition is, Subcontract Type must be Change Order Or must not be Contract and must not be PCO.

1.
    e. Click **Save.**
    f. Review the report location (folder name) and Report Name; then click **Save**.



5. **Sample Report:** All data fields categorized into groups will appear on the left.

    a. When you click Save in the "Build Report" stage, you will automatically get a sample report.
    b. This report shows up to 25 rows of results.
    c. At the bottom right corner of this page, you will be able to see an estimated number of results.

Note: Do not be alarmed if you don't see a specific project or data point in the sample. If the report is set up correctly, you will be able to see it when you run the report.

d. If you are not satisfied with this sample report, you can go back to the Build Report stage and make changes.
e. When you are satisfied with the sample report, click **Run Report**.

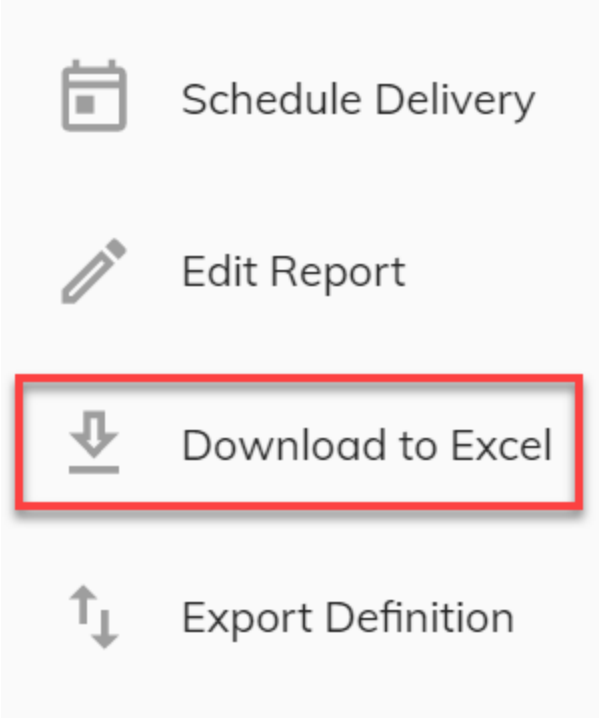
6. **Running an Existing Report:**
    a. Navigate to the report folder (location).
    b. Click on the report row to **Run** (Open) the report.

Exporting Reports

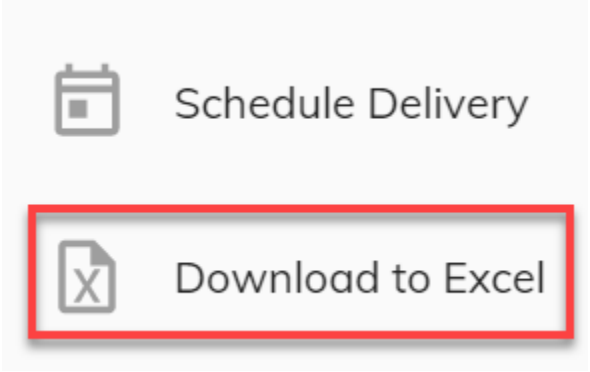
Reports can be exported from Projectmates in a couple of ways. Both methods are outlined below.

- Method 1 – From inside a folder:
    1. Click on the three dots at the extreme right of each report row.

1.
    2. Select **Download to Excel.**



- Method 2 – From inside the report:
    1. Click **More**.
    2. Select **Download to Excel.**



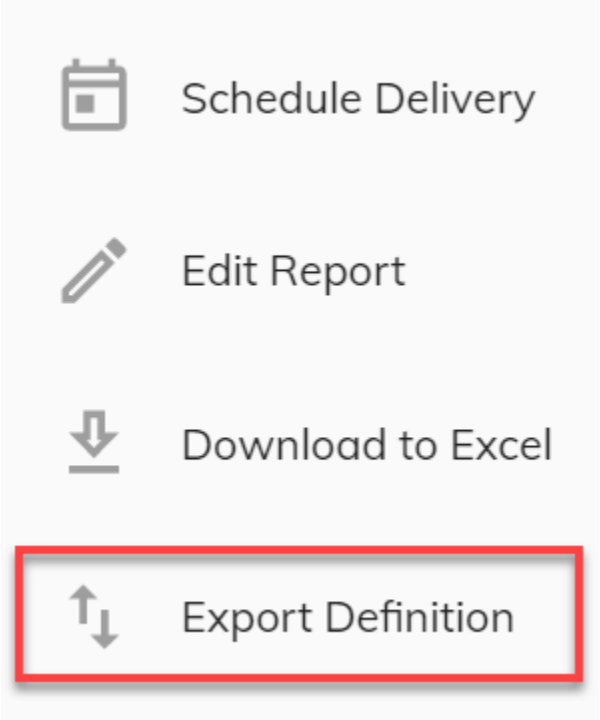
Exporting Report Definition

You can use the export definition function to export out your report details and send it to fellow Projectmates report users. This allows you to share your reports with teams without having to make your folder public.

- From inside a folder:
    1. Click on the three dots at the extreme right of each report row.

1.
    2. Click **Export Definition**. This will download a ".xml" file.

- Method 2 – From inside the report:
    1. Click **More**.
    2. Select **Download to Excel.**



- To import a Report Definition:
    1. Select and open desired report folder (You must be inside a folder to import a report definition).
    2. Click the **Import** button.

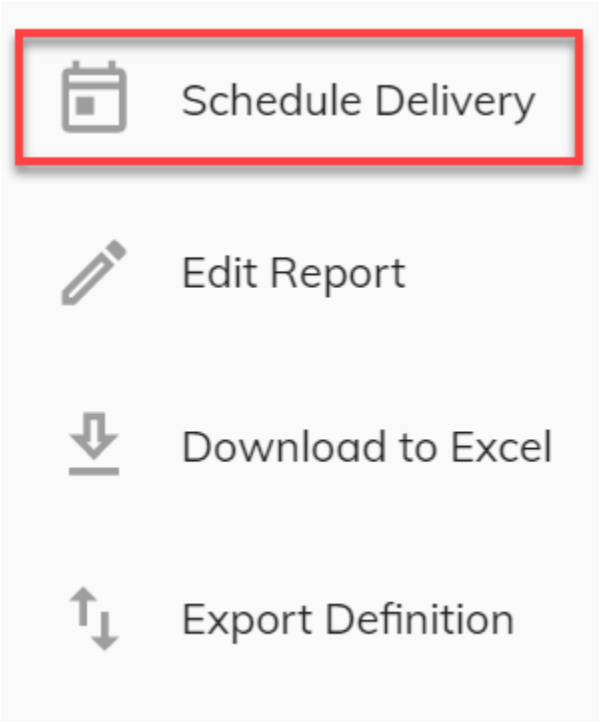
Scheduling Report Subscriptions

Ad hoc reports can easily be scheduled for email delivery to yourself and others. Others can include projectmates users and none projectmates users alike. All you need is to provide the emails and frequency of delivery and you're ready to go.

- Method 1 – From inside a folder:
    1. Click on the three dots at the extreme right of each report row.

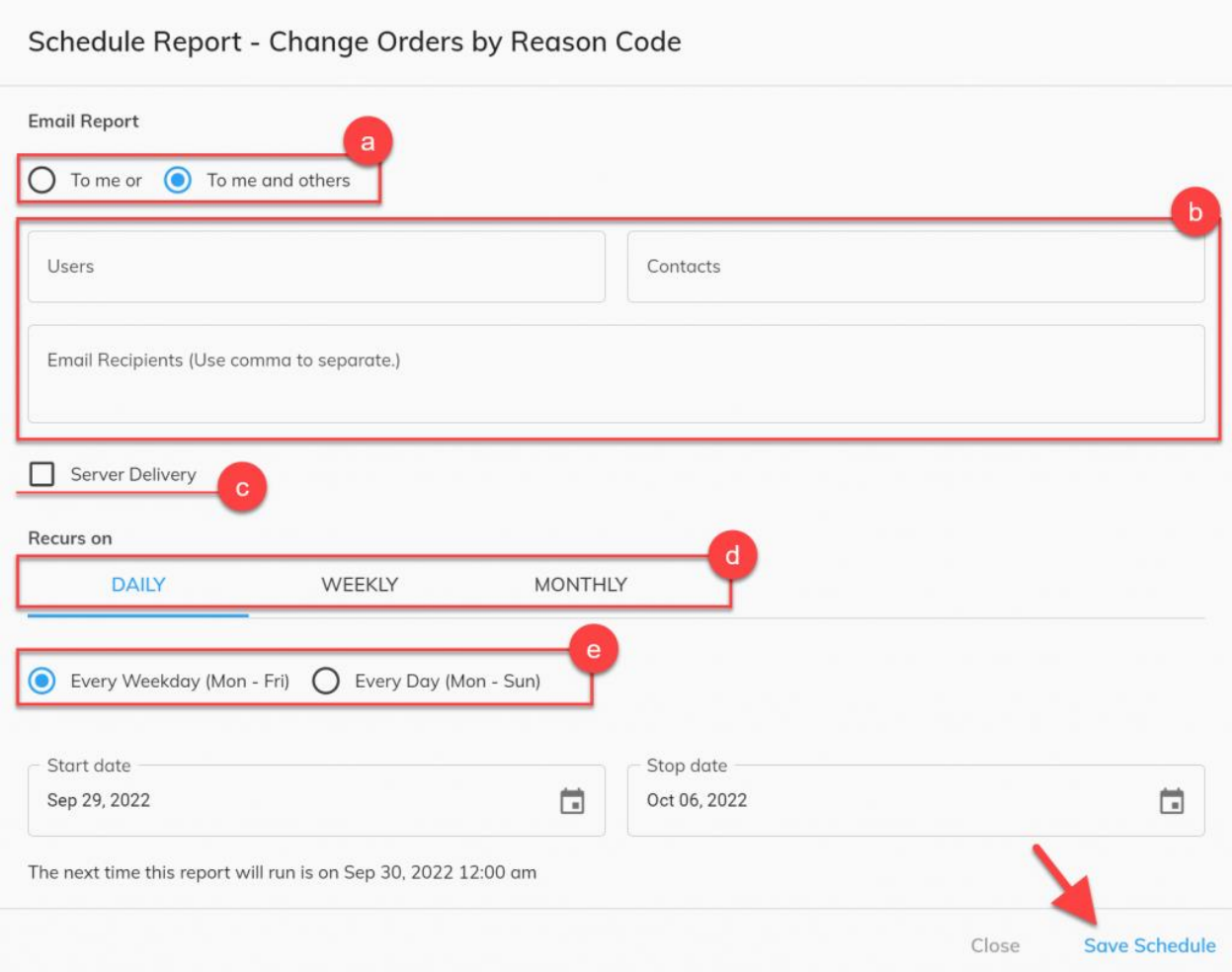
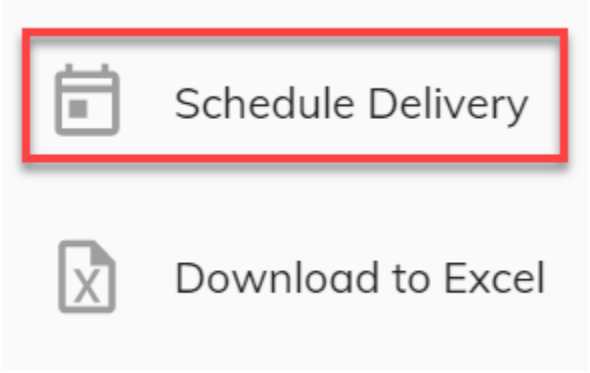
1.

2. Select **Schedule Delivery.**



1.

3. Setting up the **Scheduled Delivery Options**:
    a. Select if you want to schedule the delivery for yourself or for yourself and others.
    b. Add from Users or Contacts using the smart drop-down boxes or type in the email IDs manually. You can also simply type in an email address (Emails should be separated by commas with no spaces.)
    c. Toggle if you want to enable Server Delivery.
    d. Select Recurrence Type for daily, weekly or monthly options.
    e. Select Recurrence Frequency.
    f. Select Start and Stop dates for the scheduled delivery.
    g. Click **Save Schedule** when done.



- Method 2 – From inside the report:
    1. Click **More**.
    2. Select **Schedule Delivery** and a pop-up window will appear for further options.
    3. Setting the **Scheduled Delivery Options** (Follow instructions same as above).