

## Reports

Reporting is available in all projects and can be accessed from the Project Homepage or from anywhere within the project by clicking the '**Reports**' button in on the left hand navigation bar.

[Report Location](#)

[Running a Report](#)

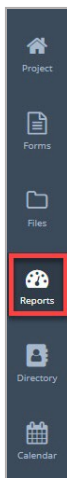
[Export a Report](#)

[Emailing a Report](#)

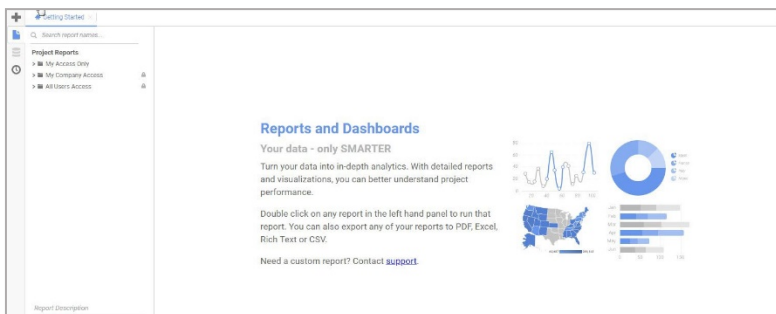
[Scheduling a Report](#)

### Report Location

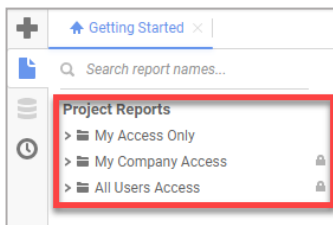
1. From within a project, click the **Reports** icon on the left navigation pane.



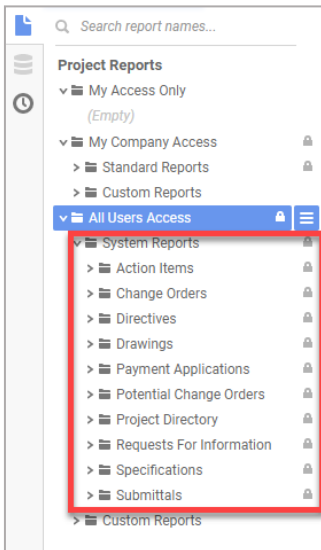
2. The reports pane will open.



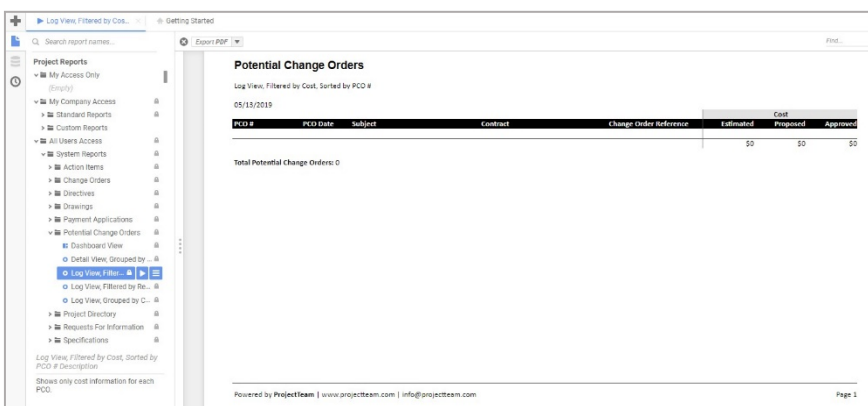
3. There are three folders contained in the reports tree.
  - a. **My Access Only** – contains reports you are currently working on and are accessible to the User only.
  - b. **My Company Access** – Reports that are ready to use on the project and accessible to all users for your company.
  - c. **All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

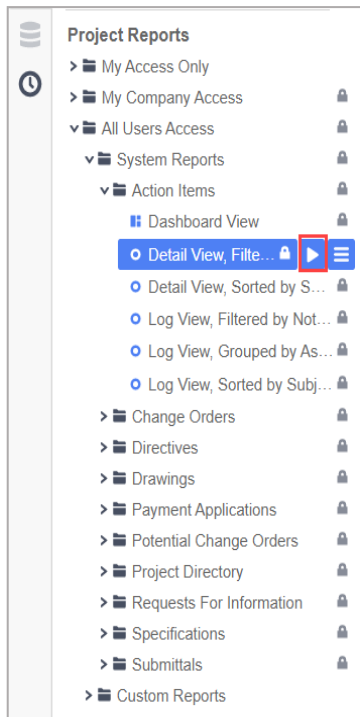


5. Although any user can run any **System Report**, they must have access to the form data to generate the report. If they do not have access to the data contained in the report, they will only receive a blank report.



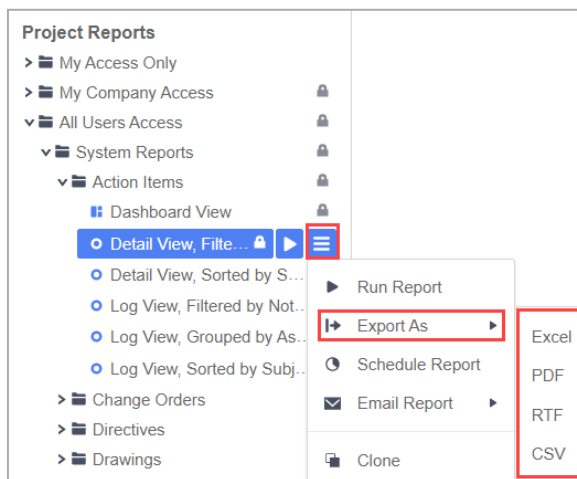
## Running a Report

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.



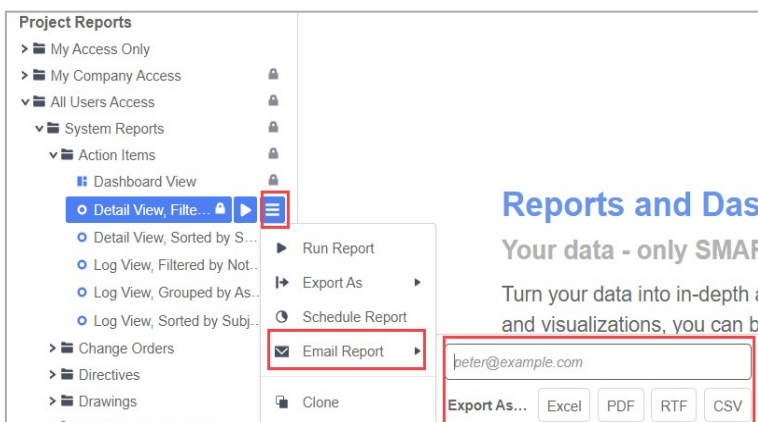
## Export the Report

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



## Email A Report

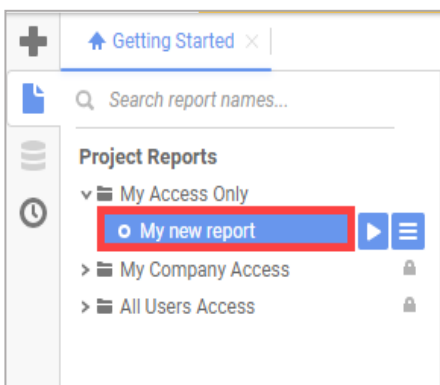
1. Click the **three-bar icon** next to the report title, select **Email Report**, enter the **recipient's email address**, and select the **file type**.



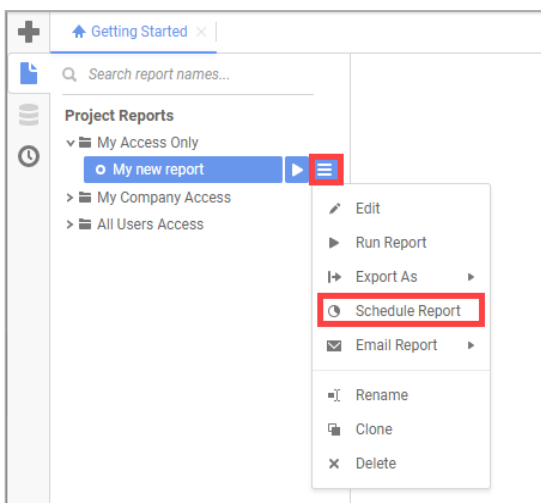
## Scheduling Report

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.

a. Schedule Name.

b. Export Type

- 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

3.

**Range of Recurrence**

Start

☒ No end date

☐ End after  occurrences

☐ End by

Attached is your report: My new report.  
This report was created in ProjectTeam.com. For more information, visit www.projectteam.com

My new report Description

Previous Next Cancel **Finish**

Recurrence Pattern

☐ Once

☐ Daily

☒ Weekly

☐ Monthly

☐ Yearly

Recur every  week(s) on:

☐ Sunday ☐ Monday ☐ Tuesday ☒ Wednesday

☐ Thursday ☐ Friday ☐ Saturday

Range of Recurrence

Start

☒ No end date

☐ End after  occurrences

☐ End by

Previous **Next** Cancel Finish

4. 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**.

**Complete the steps in the wizard below to schedule a report**

Recurrence Filters Recipients

Select filter fields to include on report

Company Logo

Logo

ProjectID

Filter By

Requests For Information Answer

Equal To

Null

AND With Next Filter

Group With Next Filter

**SUMMARY**

Requests For Information Answer = Null

Previous **Next** Cancel Finish

5. 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**.