

Project Reports

In Project Reports view, user is able to generate general and analysis reports of projects. The user can generate and print the list of the project reports based on there selected Criteria. The following are the available reports:-

Report Description	Explanations
General Reports	
Project List Report	Generate the Project List Report for the selected Customer, Activity, Brand and Date range
Project Detail Report	Generate the Project Detail Report for the selected Customer, Activity, Brand and Date Range
Project Ageing Summary Report	Generate the Project Ageing Summary Report for the selected Customer, Activity, Brand as on the selected As on Date
Project Recognized/Unrecognized Invoice List Report	Generate the Project Recognized/Unrecognized Invoice List Report for the selected Customer, Activity, Brand and the Date Range.
Project Proforma Invoice List Report	Generate the Project Proforma Invoice List Report for the selected Customer, Activity, Brand and Date Range
Project Purchase Voucher List Report	Generate the Project Purchase Voucher List Report for the selected Customer, Activity, Brand and Date Range
Project Margin Summary Report	Generate the Project Margin Summary Report for the selected Customer, Activity, Brand and Date Range

Below actions are available under **“Project Reports”**:



View and search reports for Project module

Reports Navigator

Report Categories

All Reports

HR Module

Expense Claim Reports

Accounts Module

Financial Reports

Business Partner Reports

A/c Receivable Reports

A/c Payable Reports

Analytical Group Reports

Cost Center Reports

Comparison Reports

Group Financial Reports

Asset Reports

Budget Reports

Audit Reports

Accounts Charts

Sales Module

Customer Analysis

Product Analysis

General Reports

Purchase Module

Vendor Analysis

Product Analysis

General Reports

Inventory Module

General Reports

Analysis Reports

Supply Chain Module

Sales Forecast

Supply Forecast

Project Module

General Reports

POS Module

Search:

Project List Report

Project Detail Report

Project Ageing Summary Report

Project Recognized/Unrecognized Invoice List Report

Project Proforma Invoice List Report

Project Purchase Voucher List Report

Project Margin Summary Report

Report Parameters

Project List Report

Generates the Project List Report for the selected customer,activity,brand and date range.

Customer: < Select All >

Activity: < Select All >

Brand: < Select All >

Year: Year 2015

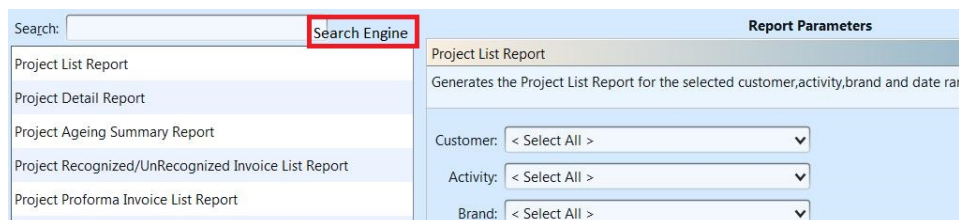
From: 01/01/2015 To: 31/12/2015

Generate Report

Selected row 1 from the Total 7 records.

View and Search Reports for Project Module

1. Enter search parameter to filter the result, i.e. type in the report name in the search textfield box at the top of the screen

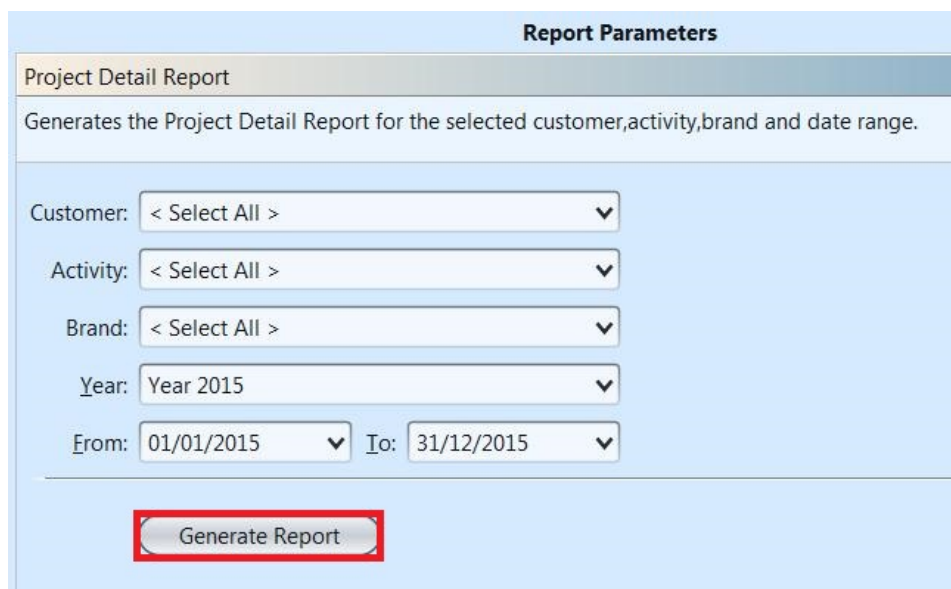


The screenshot shows the top of the application interface. On the left, there is a 'Search:' label followed by a text input field. To the right of the input field is a button labeled 'Search Engine', which is highlighted with a red rectangle. To the right of the search area is a section titled 'Report Parameters'. This section contains a list of report names: 'Project List Report', 'Project Detail Report', 'Project Ageing Summary Report', 'Project Recognized/UnRecognized Invoice List Report', and 'Project Proforma Invoice List Report'. Below this list, there are three dropdown menus labeled 'Customer:', 'Activity:', and 'Brand:', each with a '< Select All >' option.

2. Select a report from the list of reports available


3. Select the parameters to filter the report, i.e. by specific **“Brand”**, time period

4. Click **“Generate Report”** button at the bottom right of the screen to generate the report; it will open a new tab with the selected report



The screenshot shows the 'Report Parameters' section for the 'Project Detail Report'. The title 'Project Detail Report' is at the top, followed by a description: 'Generates the Project Detail Report for the selected customer,activity,brand and date range.' Below this, there are five dropdown menus: 'Customer:' (set to '< Select All >'), 'Activity:' (set to '< Select All >'), 'Brand:' (set to '< Select All >'), 'Year:' (set to 'Year 2015'), and 'From:' (set to '01/01/2015'). To the right of the 'From:' dropdown is an 'To:' dropdown set to '31/12/2015'. At the bottom of the section, there is a button labeled 'Generate Report', which is highlighted with a red rectangle.

5. On the selected report tab, some records are clickable – in this case the mouse pointer will

change to a hand pointer  – it is possible to click on these hyperlink records to open another report for that particular record or show transaction details of the record (see pictures below for an example of

project reports' hyperlinks)

Reports NavigatorProject Detail Report

Projects Ptd Ltd
Project Detail Report

From Date : 01-Jan-2015, To Date : 31-Dec-2015, Currency : SGD

Service	Start Date	To Date	Contract Value	Cost Value	Margin	Comp. (%)
PROJ-15-010001						
CREA0001-Creative Proposal	01-Jan-2015	15-Jan-2015	25,000.00	0.00	25,000.00	50.00%
CREA0001-Creative Proposal	01-Jan-2015	15-Jan-2015	0.00	5,000.00	(5,000.00)	0.00%
Sub Total :			25000	5,000.00	20000.00	
PROJ-15-010002						
CREA0001-Creative Proposal			0.00	10,000.00	20.00%	
				0.00	10000.00	
PROJ-15-0500003						
CREA0001-Creative Proposal			0.00	20,000.00	100.00%	
CREA0003-Creative Design			1,000.00	(1,000.00)	100.00%	
SKU-2015050001-ABC Concepts	18-May-2015	31-May-2015	0.00	150.00	(150.00)	100.00%
Sub Total :			20000.00	1,150.00	18850.00	
Grand Total :			55000.00	6,150.00	48850.00	

Projects

On Going

Header

Document Date	Project Number	Promised Date	Branch
01/01/2015	PROJ-15-010001	15/01/2015	HQ - Head Office
Confirmed Date	Client Manager	Description	
05/05/2015	EM02 - Amanda		

6. At the bottom of the report tab, the following options are available:

Page 1 of 3

125 %

Export / Open as PDF

Print

Parameters

Scroll to beginning, previous, next, or last page of the report

Zoom in / zoom out

Export / Open as Excel

Change report's parameters