

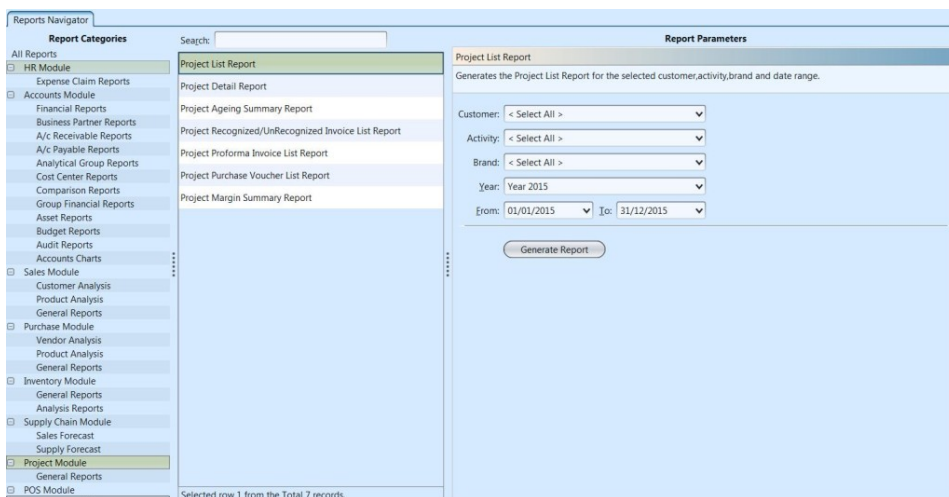
# Project Reports

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
<b>General Reports</b>	
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”**:

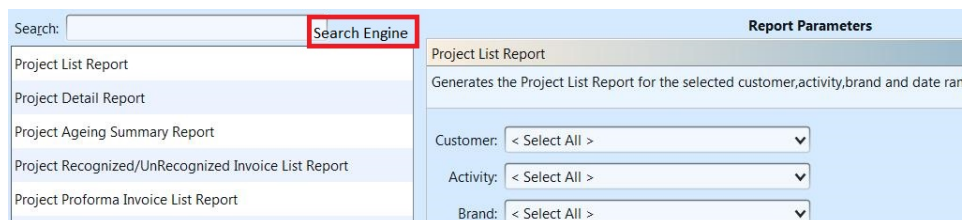
 View and search reports for Project module



The screenshot displays the 'Reports Navigator' interface. On the left, a tree view under 'Report Categories' shows the 'Project Module' selected. The main area is divided into two panes: 'Search' and 'Report Parameters'. The 'Search' pane lists several report options, with 'Project List Report' selected. The 'Report Parameters' pane shows configuration options for the 'Project List Report', including dropdown menus for Customer, Activity, and Brand, a Year dropdown set to 'Year 2015', and date range fields for 'From' (01/01/2015) and 'To' (31/12/2015). A 'Generate Report' button is located at the bottom of the parameters pane. At the bottom of the interface, it indicates '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

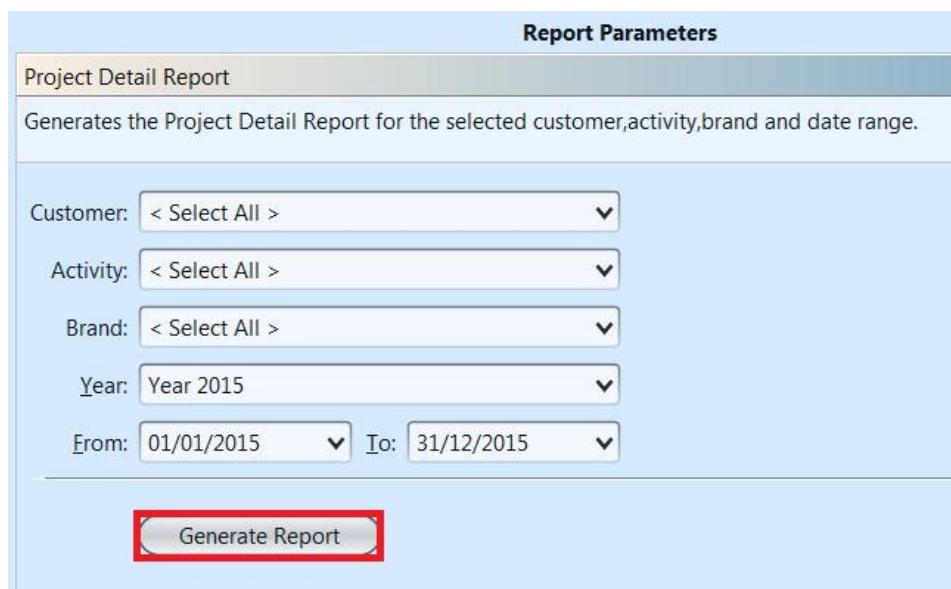


The screenshot shows a search interface with a 'Search:' text box at the top left, followed by a 'Search Engine' button highlighted with a red box. Below the search box is a list of reports: 'Project List Report', 'Project Detail Report', 'Project Ageing Summary Report', 'Project Recognized/UnRecognized Invoice List Report', and 'Project Proforma Invoice List Report'. To the right, under the heading 'Report Parameters', there are three dropdown menus for 'Customer', 'Activity', and 'Brand', each currently set to '< Select All >'. A description for the 'Project List Report' is visible: 'Generates the Project List Report for the selected customer,activity,brand and date ran'.


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' dialog for the 'Project Detail Report'. The title is 'Report Parameters' and the report name is 'Project Detail Report'. The description is 'Generates the Project Detail Report for the selected customer,activity,brand and date range.'. There are five dropdown menus for 'Customer', 'Activity', 'Brand', and 'Year', all set to '< Select All >'. The 'Year' dropdown is set to 'Year 2015'. There are two date dropdowns for 'From' (01/01/2015) and 'To' (31/12/2015). At the bottom, there is a 'Generate Report' button highlighted with a red box.

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)

**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. (%)
<b>PROJ-15-010001</b>						
CREA001-Creative Proposal	01-Jan-2015	15-Jan-2015	25,000.00	0.00	25,000.00	50.00%
CREA001-Creative Proposal	01-Jan-2015	15-Jan-2015	0.00	5,000.00	(5,000.00)	0.00%
<b>Sub Total :</b>			25000	5,000.00	20000.00	
<b>PROJ-15-010002</b>						
CREA001-Creative Propos			0.00	10,000.00	10,000.00	20.00%
<b>PROJ-15-050003</b>						
CREA001-Creative Proposal			0.00	20,000.00	20,000.00	100.00%
CREA003-Creative Design			1,000.00	(1,000.00)	1,000.00	100.00%
SKUJ-2015050001-ABC Concepts	18-May-2015	31-May-2015	0.00	150.00	(150.00)	100.00%
<b>Sub Total :</b>			20000.00	1,150.00	18850.00	
<b>Grand Total :</b>			55000.00	6,150.00	48850.00	

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:

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125 %

Parameters

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

Zoom in / zoom out

Export / Open as PDF

Print

Export / Open as Excel

Change report's parameters