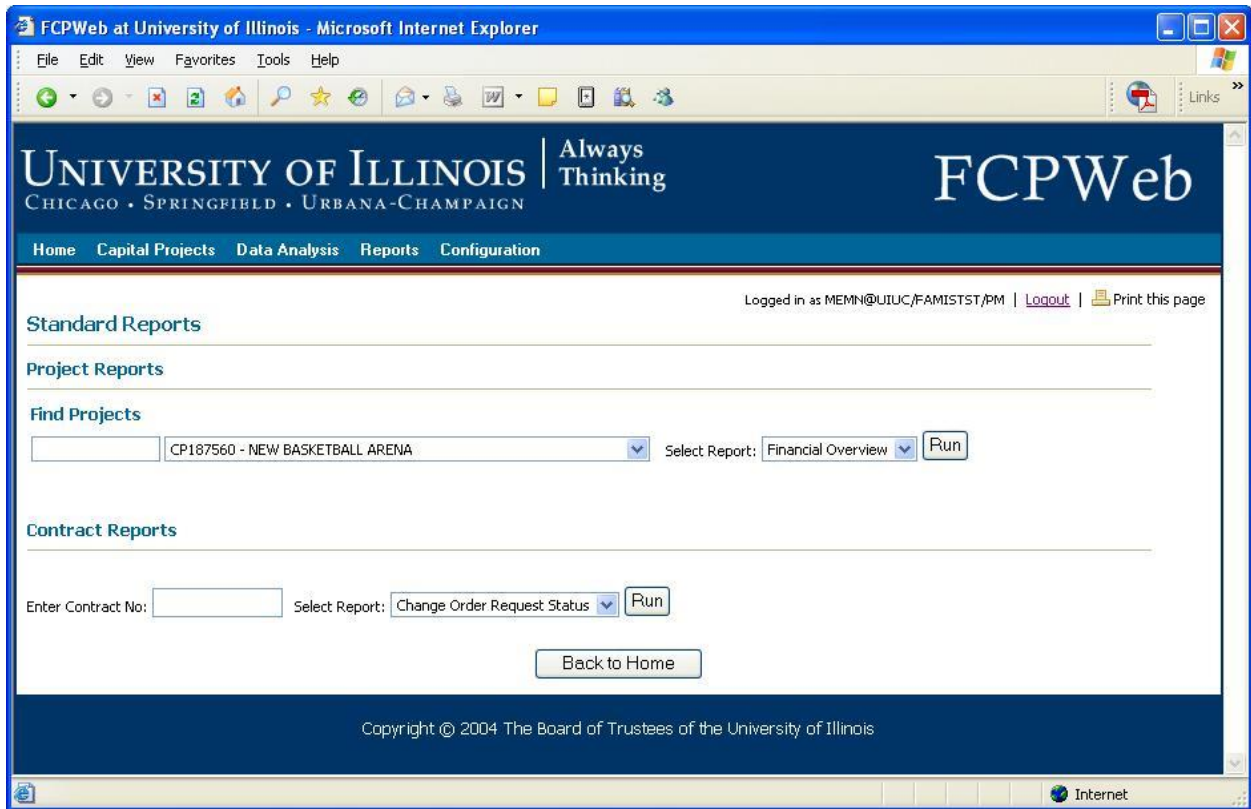


FCPWeb Standard Reports



Several pages within FCPWeb have been designed to display information in a report-type format, to make it easy for you to find the information you want quickly.

To View:	Go To
Project summary information	Project Data Summary
Funding Sources	
or	Project Data Summary
Accounts	
Project financial information, such as: Current Budget with Costs and Payments	Project Financials
Budget	Project Budget
Schedule	Project Schedule

Vendors	Project Contracts
Change Orders	Project Contracts
Payments & Credits	Project Contracts

FCPWeb also allows you to view and use Standard Reports for your projects. See *Appendix F: Reports Summary* for additional information.

To View Standard Project Reports:

- From the pull-down menus, select
 - Reports
 - Standard Reports

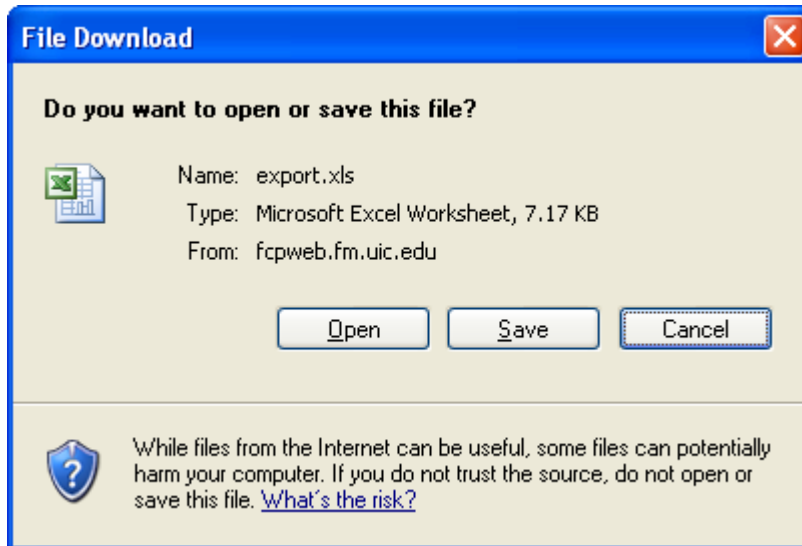
The Standard Reports screen appears.
- In the **Find Projects** text box, type a few characters of the project number you're interested in.
- The drop-down menu advances, to reveal a project containing your search characters.
- Drop down the menu and highlight on the project you are interested in.
- In the **Select Report** section, drop down the menu and select the report you would like to see.
- Click the **Run** button.
The report appears.

To Save a Report:

- Run the report you wish to save.
- At the top of the page, click on the **Export to Excel** or the **Export to PDF link**, as illustrated below, depending upon which format you desire. PDF options in parentheses indicate the eventual print size.

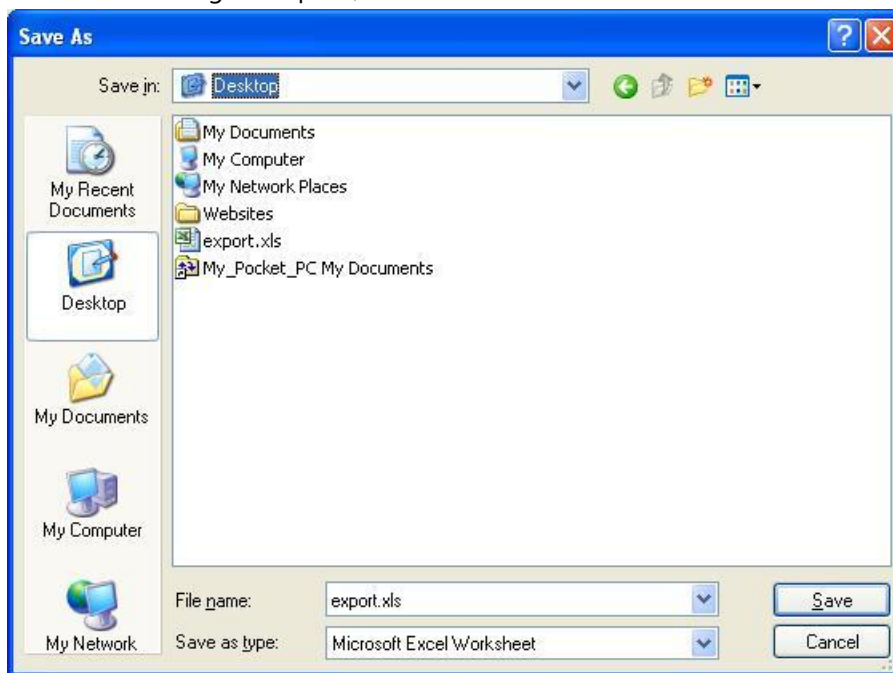


The File Download dialog box opens, as illustrated below.



3. Click on the **Save** button.

The Save As dialog box opens, as illustrated below.



4. ➤NOTE: Fields displaying with a null character (-) on screen will export to zeros in either Excel or PDF format.
5. Navigate the file system, and select the location where the file should be saved.
6. In the **Filename** text box, highlight the default filename ("export.xls" or "export.pdf") and type the name you'd like to have for the file.
7. Click the **Save** button.

The form has been saved as either an Excel spreadsheet or an Adobe Acrobat document.

My Reports

Title and Description

Report Title

Description

Fields

Project No	> >>> <<<< <		↑ ↓
Title			
Status			
Project Manager Id			
Project Manager			
Project Category			
Parent Project No			

Filters

Field	Operator	Value	Use as parameter	Add Filter

Grouping

Project No	> >>> <<<< <		↑ ↓
Title			
Status			
Project Manager Id			
Project Manager			
Project Category			
Parent Project No			

The My Reports feature of FCPWeb allows you to start from a pre-determined report template and build a customized report, using the fields available to the template. You can save the customized report and run it whenever you wish.

When you define your own reports, your selections are saved as "My Reports" so that you can go back to the definition and run the report when you wish. You define the report's name and description. And you select not only which fields will display but also the categories for display and the sort order of the display.

Available My Reports Definitions

At this writing, there were at least eight report definition templates from which to begin your customized report. They are:

Capital Projects

- Capital Projects Summary
- Change Orders
- Invoices/Credits
- MAFBE Payments
- Project Charge Accounts
- Project Contracts
- Project Financial Detail
- Project Funding
- Project Schedule
- Retainer Contracts
- Vendors
- Vendor Insurance Certificates

Capital Projects (Across Campuses)

- Capital Projects Summary - Across Campuses
- Change Orders - Across Campuses
- Invoices/Credits - Across Campuses
- MAFBE Payments - Across Campuses
- Project Charge Accounts - Across Campuses
- Project Contracts - Across Campuses
- Project Financial Detail - Across Campuses
- Project Funding - Across Campuses
- Project Schedule - Across Campuses
- Retainer Contracts - Across Campuses
- Vendor Insurance Certificates - Across Campuses

About Grouping

Grouping results allows you to specify categories for your results. For example, in a report which will show vendor activity, you can group the results by Vendor Name, allowing you to review the vendor's contracts and payments together. Alternatively, you might wish to run a report that groups information by Budget Category.

About Sorting


When you choose to sort report results, data will appear in a specific order in the report. A report sorted by date will show either the first or last item in a series first, depending on whether you choose Ascending order or Descending order.

About Filtering

Filtering allows you to selectively display information regarding projects. For example, you can omit or display information about specific aspects of the fields available in the report..

By using a filter, you get only the data you want, and extraneous data is not displayed. When you select a filter, first you select the field for which you wish to filter. Then you define how the filter should work by selecting the filter's operators. Available operators for filters are shown in the table below.

For My Reports Creation Help

As you develop your report, you may wish to have help on a particular feature. Context-sensitive help is available simply by clicking the question mark icon. 

Note: Context-sensitive help will open in a new, separate window. If you have a pop-up blocker set up for your browser, you may need to allow FCPWeb as a site in which you allow pop-ups.

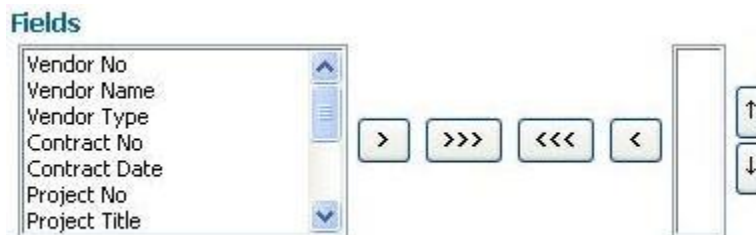
Filter Operators

Operator Name	Description
Like	A wildcard; searches for contiguous values EXAMPLE: Project Title – Like – institute
Not Like	A wildcard; searches for contiguous values EXAMPLE: Project Title – Not Like – building
Equal To	Is equal to The value you select must match exactly. NOTE: This query is case-sensitive EXAMPLE: Vendor State – Equal to – Indiana Note: This query would not return addresses where the state field was equal to the state abbreviation (IN) because it is an exact query.
In List	Exists in the list EXAMPLE: Project Status – In List – {Select from List}
Not in List	Does not exist in the list EXAMPLE: Project Status – Not in List – {Select from List}
Is Null	Has no value EXAMPLE: Funding – Is Null
Is Not Null	Has a value EXAMPLE: Contract No – Is Not Null
Greater Than	Is greater than EXAMPLE: Total Anticipated Cost – Greater Than - 5000000
Greater Than or Equal to	Is greater than or equal to

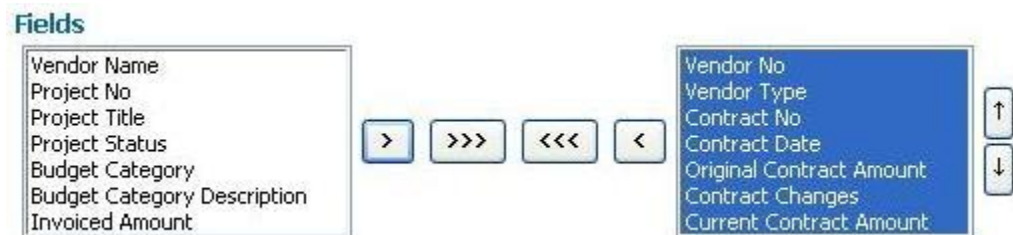
	EXAMPLE: Total Anticipated Cost – Greater Than or Equal to - 5000000
Less Than	Is less than EXAMPLE: Total Anticipated Cost – Less Than or Equal to - 5000000
Less Than or Equal to	Is less than or equal to EXAMPLE: Total Anticipated Cost – Less Than or Equal to - 5000000

To Create a New Report:

- From the drop-down menu, highlight **Reports**.
The Reports drop-down menu appears.
- From the drop-down menu, select **Create a New Report**.
The Reports screen appears, displaying a list of report template links.
- Click on the link to the report template you would like to customize.
The Configure Report screen appears.
- In the Title and Description area, in the **Title** field, type in a title for your customized report.
- In the **Description** field, type in a brief description for your customized report.
- In the **Fields** field, you will see a list of available fields you can add to your report. Each field you select will become a column in the report you're creating. Highlight a field you would like to have in your report and click the right-facing arrow, as illustrated below.



- The field name you selected moves into the window on the right, as illustrated below.



- To select all available fields, click the right-facing triple arrow button.
- The order in which the fields are listed is the order they will appear in your customized report. The field listed first will become the left-most column in your report. To move a field up or down in the list, select the field you wish to move, and click on the up or down arrows next to the selection window.
- If you make a mistake, and select a field you would prefer not to have, highlight the field in the right window and click the left-facing arrow to return it to its original list. To return all fields to their original list, click the left-facing triple arrow.
- To filter the report, in the Filters section, to add a filter, click on the **Add Filter** button.

Add Filter

The page refreshes and a line appears which allows you to select the relevant report filters.

12. In the **Field** column of the Filters section, drop down the menu and select the field you would like to filter for.
13. In the **Operator** column, drop down the menu and select the appropriate operator.
14. In the **Value** column, type the value for which you will filter.

—Or—

Click on the **Select From List** link.

A pop-up window opens that is context-sensitive, related to the field you selected. Click on the radio button (or checkbox) that represents the Value you wish to use.

15. Using a value as a Parameter allows you to enter values at run time, which is useful if you will select the values when you run the report. A good use for this feature is a date range field, in which you wish to run a report from one date to another. In that case, select Yes in the Use as Parameter area.
16. In the **Use as Parameter** column, drop down the menu and select the appropriate option.
17. In the Grouping section, the list of available fields appears again for your selection. To group results by any selected field(s), move the field name from the list on the left to the list on the right, using the arrows, as you did when you selected the fields, above.



18. To add totals to your report, in the Totals section, click on the **Add Total** button.

Add Total

19. In the **Field** column, drop down the menu and select the field you want totaled.
NOTE: This drop down menu will contain a list of fields that have numeric values only, not the entire list of fields you selected.
20. In the **Aggregation** column, select the operation you want the system to perform.
21. If you wish to have an operation performed on other numeric fields, click the Add Total button again and repeat the steps above for each numeric field on which an operation should take place.
NOTE: You may have as many totals as there are numeric fields.
22. In the Sorting section, if you wish to sort your report by a specific field, click on the **Add Sort By Option** button.
23. In the Field column, drop down the menu and select the field you'd like to sort by.
24. In the **Direction** column, drop down the menu and select one:
 - Ascending.

Add Sort By Option

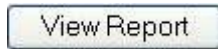
Report results will display Alphabetically, A-Z or Numerically, smallest to largest number

—Or—

- Descending.

Report results will display Alphabetically, Z-A or Numerically, largest to smallest number

25. When you have defined your report, click on the **View Report** button.



The report runs and the screen refreshes to display the report you have defined.

26. If you are disappointed with the results because you forgot to add a field, included a field you don't want, or forgot to total your results (or any other display-related reason), you may edit the report definition. Click on the **Edit Report Definition** link at the top right of the report, as illustrated below.



The screen returns to the Configure Report screen.

27. Make your changes and click on the **View Report** button.

The report runs and the screen refreshes to display the report you have re-defined.

Organizing Your Reports

If you find that your list of reports becomes long or complex, you can organize your reports by creating folders and adding reports to folders.

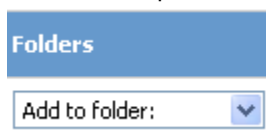
To Create a Folder:

1. In the My Reports view, on the Folders section, on the right side type the name of the folder you want to create in the text box.
2. Click the Add button.
3. Your folder will appear, as illustrated below.



To Add a Report to a Folder:

1. Locate the report you'd like to add to the folder.
2. From the dropdown menu under Folders, as illustrated below,



select the appropriate folder.

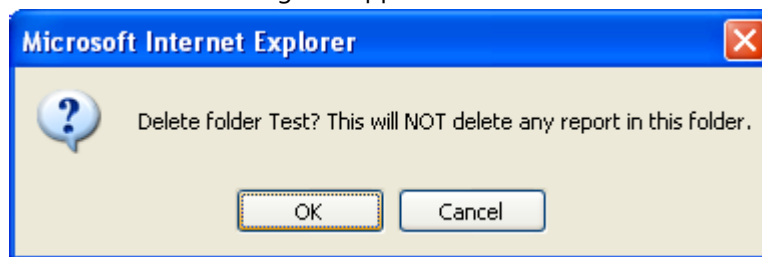
3. The report has been added to the folder.

To Remove a Report from a Folder

4. Dropdown the Folders menu.
5. Select Remove from Folder.
The view refreshes and the report has been removed from the folder.

To Delete a Folder:

1. Click the X next to the folder name.
2. The Delete Folder dialog box appears.




3. Click **OK**.
The view refreshes and the folder has been deleted.
➤NOTE: Your folder is deleted but reports in the folder have been preserved.

Sharing Reports with Others

To share a report with someone else, it is possible to simply export it. But to share a report's definition with someone else, you will need to publish the report.

To Publish a Report:


1. Create the custom report, as described in the previous section.
2. From the My Reports view, locate the report.
3. Click the **Publish** link.
The Publish Report page opens.
4. In the Publication Name field, type the name of the report as you wish others to see it.
5. In the **Description** field, offer a description of the report, and include details that others may find useful.
6. In the **Publish to Folder** field, if you wish the report to appear in one of your folders, select the folder.

7. In the **Publication Status** field, allow the **Active** status to be selected. If you wish to de-activate the report at a later date, you may modify this status and select Inactive at a later date.
8. By default the report is set to be published to a restricted user or group.
9. To publish the report to a single user, click the **Add User** button. 
10. The Select a User dialog box opens.
11. Type a few characters of the individual's name into the dialog box and click **Search**.
A list of users appears.
12. Select the name of the person for whom the publication is intended.
—Or—
13. To publish the report to a group of users, click on the **Add Group** button.



The list of groups appears, as illustrated below.

Group Name	Description
Directors	Directors (and Dir Assistants)
Directors and Financial Managers	Directors (and Dir Assistants) and Financial Managers (and FM Assistants)
Directors and Project Managers	Directors (and Dir Assistants) and Project Managers (and PM Assistants)
Financial Managers	Financial Managers (and FM Assistants)
Project Managers	Project Managers (and PM Assistants)

14. Select the name of the group to which you wish to publish the report.
—Or—
15. In the **Publication Type** field, if you wish to publish the report to all users, drop down the menu and select **Accessible to All Users**.
16. When you have finished, click on the **Publish Report** button. 
The My Reports screen returns.
The report is now available to those you have designated.