

Reports Tab

The "Reports" tab contains a list of different reports which contain information about specific types of jobs, SLA performance and invoices. The reports available all depend on the access the User has been provided, so there maybe instances where some Users have some reports that others don't.

There is a report filter at the top of the list that allows for the entry of part of the report name, and any report names that contain what has been entered will be displayed for the user to select and run, rather than having to locate the report on the list underneath. This is especially helpful for users that have a large number of reports available to them.

Here is an example of a Reports list, including the filter option at the top of the list:

Report

(select...)

Select

Reports | Refresh

Filter... | Export

Total: 257

1 2 3 4 5 6 7 8 9 10 >> >

Show 10, 15, 25, 50, 75, 100 per page

Name	Description	Warehouse Data	Auto-refresh	Category
Accounts By Period	Provides a list of accounts for a specified period (Restrictions: None)	Ready	Not set	Finance
All Assets	Provides a list of all assets for the selected building(s) (Restrictions: UB, UW)	Ready	Not set	Assets
All Buildings	Provides a list of all buildings for the selected client(s) (Restrictions: UB)	Ready	Not set	Buildings
All Certificates by State	Provides a list of most recent certificates by state where requirements exist (Restrictions: UB)	Ready	Not set	Health and Safety
All Certificates with no requirement	Provides a list of most recent certificates per Building where no Requirement exists (Restrictions: None)	Ready	Not set	Health and Safety
All Documents with Expiry Date	Provides a list of all documents (Restrictions: None)	Ready	Not set	Health and Safety
All Invoices	Provides a list of all invoices between two chosen dates (Restrictions: R, RG)	Ready	Not set	Work Orders
All Notifications by Type	Provides a list of work orders with notifications and status (Restrictions: UB)	Ready	Not set	Work Orders
All Notifications on Work Orders	Provides a graphical view of work orders with notifications	Ready	Not set	Work Orders
All Notifications on Work Orders (Active)	Provides a graphical view of work orders with notifications (Restrictions: UB)	Ready	Not set	Work Orders
All People	Provides a list of People (Restrictions: None)	Ready	Not set	Core Data
All Purchase Orders Detail	Provides a list of Purchase Orders for the specified parameters with the associated Line Items (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders
All Resources	Provides a list of Resources that are associated with the selected client(s) (Restrictions: R, RG)	Ready	Not set	Resources
All Work Order Completion Status By Contractor	Provides a graphical view of All Work Order completion status by contractor for the selected client(s) (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders
All Work Orders Attendances	Provides a list of all work orders for the specified parameters with Attendance Times (Restrictions: UB, R, RG)	Ready	Not set	Work Orders
All Work Orders By Assign Date	Provides a list of work orders for the specified parameters by assign date (Restrictions: R, RG)	Ready	Not set	Work Orders
All Work Orders By Assign Date To Current Resource	Provides a list of work orders for the specified parameters by assign date to current resource (Restrictions: UB, R, RG)	Ready	Not set	Work Orders
All Work Orders by Building	Provides a list of work orders for the specified parameters including a building filter (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders
All Work Orders by Building by Groupings With Notes	Provides a list of all work orders with notes for the specified parameters including a building grouping filter (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders
All Work Orders by Building With Notes	Provides a list of all work orders with notes for the specified parameters including a building filter (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders
All Work Orders Created Platform	Provides a list of work orders for the specified parameters identifying which platform it was raised on (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders
All Work Orders Data (No Notes simplified)	Provides a simplified list of work orders for the specified parameters without creation notes (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders
All Work Orders Data (No Notes)	Provides a list of work orders for the specified parameters without creation notes (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders
All Work Orders Data (With Notes)	Provides a list of all work orders for the specified parameters with creation notes (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders
All Work Orders Data With Notes Inc Last Note	Provides a list of all work orders for the specified parameters with creation notes including the last note (Restrictions: UB, R, RG, UW)	Ready	Not set	Work Orders

It works in a similar manner to a Jobs list in that the "Filter...", "Export", "Refresh" and number of jobs per page functions exist and perform the same actions. Upon clicking a report, the report is then opened for the User to view.

Note: If the report is ever shown in a grey, it means that the databases containing the data used in the report have not been rebuilt yet and haven't gotten today's data. When they return back to white, this means that the data is up to date.

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