# Project List

PWR805.RPT



## Overview

### *Purpose of the Report*

The Project List allows you to review each client's information entered in Project Tracking.

### *When to Produce the Report*

Produce this report when you want to review detail or summary information about your projects. This report can be used to get a list of projects that need to be started or a list of projects that a particular employee is assigned to.

### *Permissions Required to Access the Report*

An employee must have 'Projects' checked in the Employee's Permissions to be able to produce this report.

## Sort Options Available

You can determine the order that the projects appear on the report by choosing one or more of the following fields:

- Project ID
- Project Name
- In Charge
- Team Leader
- Project Planned Start Date
- Project Planned Finish Date
- Project Budget Hours
- Project Budget Amount
- Project Actual Hours
- Project Actual Amount
- Task ID
- Task Name
- Task Employee
- Task Work Code
- Task Start Date

- Task Finish Date
- Task Budget Hours
- Task Budget Amount
- Task Actual Hours
- Task Actual Amount
- Client ID
- Client Engagement
- Billing Engagement
- Client Name
- Partner
- Manager
- Biller
- Accountant
- Group
- Office
- NAICS Code
- Entity

**Note:** The subtotal check box on the Sort tab is disabled for this report since there is no information available to produce a subtotal.

## Select Options Available

You can determine which projects will appear on the report by entering a range or a list in one or more of the following fields:

- Project ID
- In Charge
- Team Leader
- Project Planned Start Date
- Project Planned Finish Date
- Task ID
- Task Employee
- Task Work Code
- Task Planned Start Date
- Task Planned Finish Date
- Client ID
- Client Engagement
- Billing Engagement
- Partner
- Manager
- Biller
- Accountant
- Group
- Office
- NAICS Code
- Entity Types
- Year End

# Format Options

### *Presentation Options*

You can choose which sections should appear on the report:

- Show Personnel Data - the employees assigned as the person in charge, team leader, PFX Tax Preparer, Engagement Employee Assignment or any created Role for each project on the report.
- Show Dates - includes the following information on your report: planned start and finish dates; actual start and finish dates; promise date; original planned finish date; statutory date; first, second, third and fourth extension dates; tickler days and status; completion status; and reopened status.
- Show Hours and Amounts - the budgeted hours and amount, and actual hours and amount are included on the report.
- Show Rates - to include the following information on the report: flat billing rate; fixed fee amount; surcharge amount; whether or not the surcharge is applied at first entry; whether or not the surcharge has been applied; and the surcharge work code.

# Report Layout

Employee: (1) Page: 1

**Billam and Smyle**
**Project List**
For the Period Ending August 31, 1997

| Project ID | Project Name | Client | Engmnt. | Client Engagement Name |
|---|---|---|---|---|
| (2) | (3) | (4) | (5) | (6) |

*{ Personnel Data }*

Personnel
Role Name (7)

*{ Dates }*

Dates:

| | | | | | |
|---|---|---|---|---|---|
| Planned Start: | (8) | Status: | (9) | | |
| Planned Finish: | (10) | Priority: | (11) | Tickler Days: | (12) |
| Actual Start: | (13) | Freqyency : | (14) | Tickler Sent: | (15) |
| Actual Finish: | (16) | Complexity: | (17) | Reopened: | (18) |
| Promise: | (19) | Statutory Due: | (20) | | |

*{ Extensions }*

Extensions:

| | | | |
|---|---|---|---|
| Orig. Plan Finish: | (21) | | |
| First Extension: | (22) | Third Extension: | (23) |
| Second Extension: | (24) | Fourth Extension: | (25) |

*{ Hours and Amounts }*

Hours & Amounts:

| | | | |
|---|---|---|---|
| Budgeted Hours: | (26) | Actual Hours: | (27) |
| Budgeted Amount: | (28) | Actual Amount: | (29) |

*{ Rates }*

| | | | | | |
|---|---|---|---|---|---|
| Rates: | | Surcharge: | | | |
| Flat Billing Rate: | (30) | Amount: | (31) | Apply to First: | (32) |
| Fixed Fee Amount: | (33) | Work Code: | (34) | Applied: | (35) |

(1) Calculated field: Employee ID of Employee producing the report
(2) From: Project in Project Tracking.
(3) From: Name in Project Tracking.
(4) From: Client ID in Client Properties (General)
(5) From: Engagement in Client Properties (General)
(6) From: Name in Client Properties (General)

***{ Personnel Data }***

(7) Calculated field: The FirstName field plus the LastName from the STAFF record with EmpID the same as the EMPID field in the PROJSTAF record.

***{ Dates }***

(8) From: The Planned Start Date in Project Tracking (Planned Dates).
(9) From: The Project Status in Project Tracking, stored in the Status table (Administrative).
(10) From: The Planned Finish Date in Project Tracking (Planned Dates).
(11) Calculated field: If the Priority field in PROJECT records is 1, then it prints "High", if 2, then it prints "Elevated", if 3, then it prints "Medium", if 4, then it prints "Low", and if 0, then it prints blank.
(12) From: The Tickler Days in Project Tracking (Settings).
(13) From: The Actual Start Date in Project Tracking (Actual Dates).
(14) From: The Frequency in Project Tracking (Administrative).
(15) Calculated field: If the TicklerSent field in PROJECT records is True, then it prints a 'Yes', otherwise it prints a 'No'.
(16) From: The Actual Finish Date in Project Tracking (Actual Dates).
(17) Calculated field: If the Complexity field in PROJECT records is 1, then it prints "High", if 2, then it prints "Elevated", if 3, then it prints "Medium", if 4, then it prints "Low", and if 0 then it prints blank.
(18) Calculated field: If the Reopened field in PROJECT records is True, then it prints a 'Yes', otherwise it prints a 'No'.
(19) From: The Promise Date in Project Tracking (Planned Dates).
(20) From The Statutory Due Date in project Tracking (Planned Dates).

***{Extensionss }***

(21) From The Original Finish Date in Project Tracking before any extensions (Extensions).
(22) From: The Extension 1 in Project Tracking (Extensions).
(23) From: The Extension 3 in Project Tracking (Extensions).
(24) From: The Extension 2 in Project Tracking (Extensions).
(25) From: The Extension 4 in Project Tracking (Extensions).

***{ Hours and Amounts }***

(26) Calculated field: The BudgetHours field divided by 100 in PROJECT records.
(27) Calculated field: The ActualHours field divided by 100 in PROJECT records.
(28) From: The Budget Amount in Project Tracking (Administrative).
(29) From: The Actual Amount in Project Tracking (Administrative).

***{ Rates }***

(30) From: The Flat Rate in Project Tracking (Settings).
(31) From: The Surcharge Amount in Project Tracking (Settings).
(32) Calculated field: If the SurchargeApplyEnd field in PROJECT records is True, then it prints a 'No', otherwise it prints a 'Yes'.
(33) From: The Fixed Fee in Project Tracking (Settings).
(34) From: The Surcharge Work Code in Project Tracking (Settings).
(35) Calculated field: If the SurchargeApplied field in PROJECT records is True, then it prints a 'No', otherwise it prints a 'Yes'.