

Task Scheduling

PWR205.RPT

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Overview

Purpose of the Report

The Task Scheduling report is used to determine which tasks are pending, open, late, completed or reopened. Use this report to determine where to allocate employees. Note: This report is a date based report.

When to Produce the Report

Produce the Task Scheduling report when you need to determine the status of the tasks.

Permissions Required to Access the Report

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

Sort Options Available

You can determine the order and which subtotals appear on the report by choosing one or more of the following fields:

- Project ID
- Project Name
- In Charge
- Team Leader
- Project Start Date
- Project 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

Select Options Available

You can determine which tasks 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 Start Date
- Project Finish Date
- Task ID
- Task Employee
- Task Work Code
- Task Start Date
- Task Finish Date
- Client ID
- Client Engagement
- Billing Engagement
- Partner
- Manager
- Biller
- Accountant
- Group
- Office
- NAICS Code
- Entity

Format Options

Presentation Options

You can choose what information prints:

- Show Pending - includes tasks either with the Finish Date or the Start Date blank, or any task that do not meet the following criteria.
- Show Open - includes tasks with the Actual Start Date greater than or equal to the Start Date.
- Show Late - includes tasks with the computer's system date greater than the FinishDate.
- Show Completed - includes tasks that have been marked as completed.
- Show Reopened - includes tasks that have been marked as reopened.
- Show Only Task Templates - prints only the tasks that have been set up as templates for other tasks.
- Show Task Memo - prints any memos entered for each task on the report.
- Show Task Name - prints the name of the task.
- Show Client Name - prints the name of the client that the task is for.

Report Layout

Employee: (1)

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Billam and Smyle

Task Scheduling

For the Period Ending August 31, 1997

Client ID	Engmt.	Project	Task	EmpID	WKC	Status	Start Date	Finish Date	Actual Start	Actual Finish
(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
(13)			(14)							
(15)										

- (1) Calculated field: Employee ID of Employee producing the report
- (2) From: The ClientID field in TASK records.
- (3) From: The Engagement field in TASK records.
- (4) From: The Project field in TASK records.
- (5) From: The TaskID field in TASK records.
- (6) From: The EmpID field in TASK records.
- (7) From: The WorkCode field in TASK records.
- (8) Calculated field: If the Reopened field in TASK records is equal to True, then it prints 'Reopened'. Else if Completed field in TASK records is equal to True, then it prints 'Completed'. Else if the FinishDate in TASK records is blank or the StartDate in TASK records is blank, then it prints 'Pending'. Else if the computer's system date is greater than the FinishDate in TASK records, then it prints 'Late'. Else if the ActualStartDate field is greater than or equal to StartDate field in TASK records, then it prints 'Open'. Else it prints 'Pending'.
- (9) From: The StartDate field in TASK records.
- (10) From: The FinishDate field in TASK records.
- (11) From: The ActualStartDate field in TASK records.
- (12) From: The ActualFinishDate field in TASK records.
- (13) From: The Name1 field in CLIENT records.
- (14) From: The Name field in TASK records.
- (15) From: The Memo field in TASK records.

Glossary

A/R activity - consists of Invoices, Tax, Finance Charges, Payments, and Adjustments.

Current state report - a report that reflects the data as it is now, without regard to what happened during the period or year. See also Point in time report.

Date based report - a report that filters transactions or accumulates amounts based on the date of the transaction rather than when the transaction was posted. For example, if a transaction dated in January was not posted until after January had been closed, a date based report would report as if the transaction was entered in January. See also Period based report.

Future dated A/R activity - any A/R activity with a PeriodNum greater than the current period.

Future dated WIP activity - any WIP activity with a PeriodNum or BilledPeriodNum greater than the current period.

Period based report - a report that filters transactions or accumulates amounts based on when the transaction was posted rather than the date of the transaction. For example, if a transaction dated in January was not posted until after January had been closed and the current period was February, a period based report would report as if the transaction was entered in February. See also Date based report.

Point in time report - a report that reflects the data as it was posted during a period of time, without regard to the current state of the data. For example, the PTD WIP Reconciliation shows how much time was posted to an account during the current period, not how much is left in the account when the report is printed. See also Current state report.

PTD - Period-to-date.

WIP activity - consists of Time, Expenses, Billings, MarkUps, MarkDowns, and Transfers in WIP.

YTD - Year-to-date.

