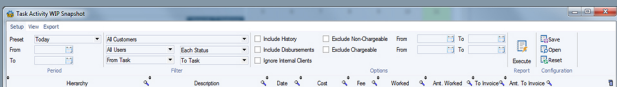


# TIPS AND TRICKS

## WIP SNAPSHOT: MANAGING REPORT TOOL

IN ORDER TO UNDERSTAND BETTER THE WAY YOU CAN USE WIP SNAPSHOT, WE ARE GOING TO PROVIDE YOU WITH THE DETAILED DESCRIPTION ON EVERY FUNCTION YOU CAN FIND WITHIN THE WINDOW.

## SETUP...



### 'PERIOD' / 'FILTER' GROUPS

**PRESET** | SELECT THE TIME PERIOD YOU WANT YOUR REPORT TO BE BUILT ON.

**FROM - TO** | SELECT THE DATES

**ALL CUSTOMERS** | SELECT THE CUSTOMER FOR THE REPORT

**ALL USERS** | SELECT THE USER PROFILE

**FROM TASK - TO TASK** | SELECT THE SPECIFIC TASK YOU WANT TO SEE IN THE REPORT

**EACH STATUS** | SELECT THE STATUS OF THE TASK 'INVOICED' 'NOT INVOICED'

### 'CONFIGURATION' GROUP

**SAVE** | SAVE THE REPORT WITH THE PRESELECTED FILTERS

**OPEN** | OPEN THE SELECTION OF THE SAVED REPORTS

**RESET** | RESET ALL THE FILTERS

### 'OPTIONS' / 'REPORT' GROUPS

**INCLUDE HISTORY** | INCLUDE THE TIMESHEETS THAT HAVE BEEN INVOICED

**INCLUDE DISBURSEMENTS** | INCLUDE THE SERVICES THAT ARE CONSIDERED AS NON-CHARGEABLE EXPENSES

**IGNORE INTERNAL CLIENTS** | NOT INCLUDE THE INTERNAL CLIENTS

**EXCLUDE NON-CHARGEABLE** | EXCLUDE THE SERVICES THAT ARE NON-CHARGEABLE FOR THE CLIENT

**EXCLUDE CHARGEABLE** | EXCLUDE THE SERVICES THAT ARE CHARGEABLE FOR THE CLIENT

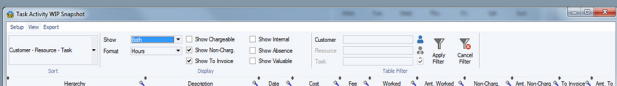
**EXECUTE** | EXECUTE FILTERS AND START BUILDING THE REPORT



DEPENDING ON THE FILTERS YOU SET, THE REPORT MIGHT BE DISPLAYED AS BELOW

Hierarchy	Description	Date	Cost	Fee	Worked	Ant. Worked	To Invoice	Ant. To Invoice
Cheerful Squamel Fund			\$0.00	\$75.00	167.45	\$9,686.25	167.45	\$9,686.25
almon			\$0.00	\$88.00	00.25	\$36.67	00.25	\$36.67
1300 - 007 - KPI proposal	KPI proposal	3/17/2016	\$0.00	\$88.00	00.25	\$36.67	00.25	\$36.67
17/03/2016			\$0.00	\$88.00	00.25	\$36.67	00.25	\$36.67
cCellentano			\$0.00	\$88.00	30.50	\$2,677.33	30.50	\$2,677.33
cDanile			\$0.00	\$52.00	21.55	\$1,139.67	21.55	\$1,139.67
ehamp			\$0.00	\$33.00	47.20	\$1,592.00	47.20	\$1,592.00
eRennata			\$0.00	\$88.00	08.50	\$777.33	08.50	\$777.33
Macquaria			\$0.00	\$75.00	01.05	\$81.25	01.05	\$81.25
Escarano			\$0.00	\$48.00	40.50	\$1,960.00	40.50	\$1,960.00
Hlang			\$0.00	\$88.00	16.30	\$1,452.00	16.30	\$1,452.00
Cloudy Chincilla Fund			\$0.00	\$45.00	110.25	\$7,140.83	110.25	\$7,140.83
Foggy Tree Fund			\$0.00	\$33.00	118.50	\$6,323.17	118.50	\$6,323.17
Green Cherry Fund			\$0.00	\$45.00	130.55	\$9,323.08	130.55	\$9,323.08
Green Cherry Portfolio Company			\$0.00	\$33.00	100.50	\$7,288.00	100.50	\$7,288.00
Green House Fund			\$0.00	\$52.00	138.25	\$7,601.83	138.25	\$7,601.83
Happy Pineapple Fund			\$0.00	\$33.00	113.25	\$7,096.67	113.25	\$7,096.67
Meekat Fund			\$0.00	\$45.00	169.30	\$13,179.67	169.30	\$13,179.67
Panda Fund			\$0.00	\$88.00	164.50	\$13,576.42	164.50	\$13,576.42
Plain Line Fund			\$0.00	\$33.00	90.40	\$4,380.42	90.40	\$4,380.42
Snail Strawberry Fund			\$0.00	\$48.00	151.25	\$8,014.92	151.25	\$8,014.92
Snowy Rabbit Fund			\$0.00	\$45.00	74.00	\$5,646.25	74.00	\$5,646.25
Tail Tiger Fund			\$0.00	\$52.00	129.30	\$7,836.92	129.30	\$7,836.92

## VIEW...



### 'SORT' GROUP

**SORT** | SELECT THE WAY THE DATA IN THE CREATED REPORT WILL BE SORTED

### 'DISPLAY' GROUP

**SHOW** | SELECT THE WAY PROVIDED SERVICES TO BE DISPLAYED IN 'HOURS' OR 'AMOUNTS'

**FORMAT** | SELECT THE FORMAT FOR 'HOURS' AND 'AMOUNTS'

**SHOW TO INVOICE** | CHECK IF YOU WANT TO ADD THE COLUMN 'TO INVOICE' AND SEE HOW MUCH IS GOING TO BE INVOICED FOR THE SERVICES

**SHOW INTERNAL** | CHECK IF YOU WANT TO ADD 'INTERNAL' COLUMN AND SEE THE RESULTS FOR THE INTERNAL TASKS

**SHOW ABSENCE** | CHECK IF YOU WANT TO ADD 'ABSENCE' COLUMN AND SEE THE RESULTS FOR THE AMOUNT OF ABSENCE HOURS

**SHOW VALUABLE** | CHECK IF YOU WANNA SEE THE FEE PER HOUR

### 'TABLE FILTER' GROUP

**CUSTOMER** | CHOOSE A CUSTOMER AND APPLY A FILTER TO THE TABLE

**RESOURCE** | CHOOSE THE RESOURCE AND APPLY THE FILTER

**TASK** | CHOOSE THE SPECIFIC TASK AND APPLY THE FILTER

**APPLY FILTER** | PRESS TO APPLY THE VIEW FILTERS THAT WERE SET

**CANCEL FILTER** | PRESS TO CANCEL THE CHOSEN FILTERS

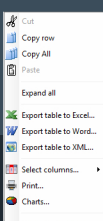
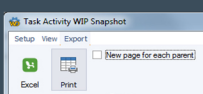


DEPENDING ON THE VIEW FILTERS YOU SET, THE REPORT MIGHT BE DISPLAYED AS BELOW

Hierarchy	Description	Date	Cost	Fee	Worked	Chargeable	Non-Charg.	To Invoice	Internal	Absence	Valuable
Cheerful Squamel Fund			\$0.00	\$75.00	167.75	167.75	0.00	167.75	0.00	0.00	0.00
almon			\$0.00	\$88.00	0.42	0.42	0.00	0.42	0.00	0.00	0.00
1300 - 007 - KPI proposal	KPI proposal	3/17/2016	\$0.00	\$88.00	0.42	0.42	0.00	0.42	0.00	0.00	0.00
17/03/2016			\$0.00	\$88.00	0.42	0.42	0.00	0.42	0.00	0.00	0.00
cCellentano			\$0.00	\$88.00	2.00	2.00	0.00	2.00	0.00	0.00	0.00
1300 - 004 - Review of Draft FS	Perform self-review c		\$0.00	\$70.00	12.17	12.17	0.00	12.17	0.00	0.00	0.00
1300 - 005 - Validation of revenues	Validation of revenue		\$0.00	\$88.00	16.25	16.25	0.00	16.25	0.00	0.00	0.00
1300 - 006 - Constraints and diffc	Constraints and diffc		\$0.00	\$88.00	0.42	0.42	0.00	0.42	0.00	0.00	0.00
1300 - 008 - Action Plan	Action Plan		\$0.00	\$52.00	21.92	21.92	0.00	21.92	0.00	0.00	0.00
cDanile			\$0.00	\$33.00	47.33	47.33	0.00	47.33	0.00	0.00	0.00
ehamp			\$0.00	\$88.00	8.83	8.83	0.00	8.83	0.00	0.00	0.00
eRennata			\$0.00	\$75.00	1.08	1.08	0.00	1.08	0.00	0.00	0.00
Macquaria			\$0.00	\$48.00	40.83	40.83	0.00	40.83	0.00	0.00	0.00
Escarano			\$0.00	\$88.00	16.50	16.50	0.00	16.50	0.00	0.00	0.00
Hlang											

## EXPORT...

THERE ARE DIFFERENT WAYS TO EXPORT YOUR REPORT TO EXCEL, WORD AND XML, AS WELL AS TO PRINT IT OUT. EXPORT TAB IS VERY EASY TO USE. CHECK 'NEW PAGE FOR EACH PARENT' IN CASE YOU WANT THE RESULTS FOR EVERY CUSTOMER / USER / TASK FROM YOUR REPORT TO BE PRINTED ON SEPARATE PAGE.



IN THE PREVIOUS NEWSLETTERS WE ALREADY EXPLAINED HOW TO USE THE CONTEXT MENU AT THE TOP RIGHT SIDE OF THE TABLE, IN CASE IF YOU WANT TO PRINT OUT THE DATA.

WATCH OUR TUTORIAL ON YOUTUBE



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