

# Gold Support Webinar Series:

## Project Reporting

This webinar was created to provide an overview of client-facing reports for projects. The session includes 30-40 minutes of feature introduction and demonstration followed by a Q&A period.

### Session Topics

- Overview of Client-Facing Reports
- Proposal vs. Line Item Detail Reports
- Report Parameters and Definitions
- Report Settings
- Report Groups

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Notes

## Overview of Client-Facing Reports

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- Many client-facing reports exist including:
  - Company profile
  - Scope of Work
  - Summary reports (by system or location)
  - Equipment detail reports (proposal and line item)
  - Contract
- We can assemble these reports into a report group, or “proposal package”
- Features include:
  - Product images
  - Equipment price vs. Installed price
  - Showing Packages (proposal only)
  - Showing Accessories grouped with parent item (proposal only)
  - Dynamic Grouping allows us to group data using key fields like location, system or category (up to three levels)

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## Proposal vs. Line Item Detail Reports

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- **Line Item Detail reports**
  - Simple list of equipment, ignoring packages and accessories
  - Available in four configurations:
    - Equipment Price
    - Installed Price
    - Discount and Net Price
    - Unit Price and Total Price
- **Proposal reports**
  - Respect the hierarchy of packages, items and accessories
  - Available in three configurations (each with or without images):
    - Equipment Price
    - Installed Price
    - Equipment and Labor Price (in two columns)

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### **ACTIVITY 1**

#### **Run the Proposal Summary report**

1. Click Reports → Client.
2. Click the '+' next to Proposal Summary.
3. Double-click the report definition named 'By System.'

### **ACTIVITY 2**

#### **Run a Line Item Detail report**

1. Click Reports → Client.
2. Choose a Line Item Detail report (Notice there are three versions.)
3. Make sure to click the '+' next to the report name and choose a definition.
4. Double-click on the definition.

### **ACTIVITY 3**

#### **Run a Proposal report**

1. Click Reports → Client.
2. Choose a Proposal report (Notice there are nine standard versions.)
3. Make sure to click the '+' next to the report name and choose a definition.
4. Double-click the definition.

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## Report Parameters and Definitions

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- Most reports contain parameters to configure different report features
- Reports can store unique parameter combinations as report definitions
- Report definitions also store report groupings (by location, system, etc.)
- Report definitions make it easy to run different versions of the same report
- Parameter examples:
  - Hide cover page?
  - Show labor items in report?
  - Show labor by phase in the summary?
  - Show Model?
  - Show Part Number?
  - Summarize Packages/Accessories? (All, Item, None)
  - Show item prices? (price of line items)
  - Show detail prices? (price of accessories or items in packages)

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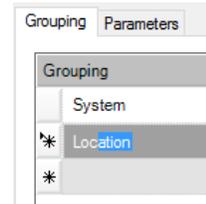
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## ACTIVITY 4

### Create and run a Report Definition

1. From the main SI window click Start → Reports → Manage Reports.
2. In the list of reports, click the '+' next to the Client Reports category to expand the list of client reports.
3. Find Proposal With Images. Right-click on this report and select New → Report Definition.
4. In the Report Definition window, type a Description like '[Your Initials] - By System By Location – No Cover Page.' This will be the name of the Report Definition in the list.
5. Now, on the Grouping tab type 'System' on the first line and type 'Location' on the next line. The results should look like this:
6. Click on the Parameters tab and check the Hide Cover Page option.
7. Click Save.
8. To run this report definition, return to the Project Explorer. Use the Quick Access menus across the bottom of the window (Projects → Projects.)
9. Select your project from the list. Click Reports → Client Reports.
10. The Project Reports window opens. Click the '+' next to the Proposal With Images report.
11. Find you report definition and double-click it. Your report definition will run.



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# Notes

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## Report Settings

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- Reports have many global settings that are shared with all users
- Common report settings include:
  - Themes to customize the color palette
    - D-Tools ships with seven color themes available to use
    - Custom themes make a good first step in customizing reports
  - Summary settings to control labels in the project summary
    - Label Product Adjustment as “Equipment Discount”
    - Label Miscellaneous Items as “G&A”
  - Choosing Metric Paper Size (A4)
  - Setting Default “Quick Reports”
    - Set your most common reports as Quick Reports
  - Settings related to the data available to reports
    - Need product URL or item level tax for a custom report?
    - Listing project resources in reports?

Settings to control how Alternates and Optionals appear in reports

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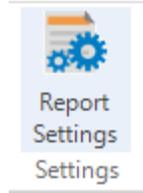
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## ACTIVITY 5

### Access Report Settings

1. To access report settings, navigate to the Report Explorer, the Project Explorer Reports tab or the Reports tab inside of a project.
2. Find the Report Settings button and click it.
3. From the Report Settings window you can browse through the different settings by selecting one of the categories listed in the left side menu. This will show settings for the selected option.
4. Saving report settings is a global change in D-Tools.



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## Report Groups

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- Report groups allow you to run many reports together at the same time
- To create a proposal package, combine:
  - Cover Page
  - Company Profile
  - Scope of Work
  - Location/System Summary
  - Line Item Detail or Proposal
  - Contract
- Combine various management reports:
  - Project Summary
  - Detailed Cost Summary (by Phase)
  - Project Hours

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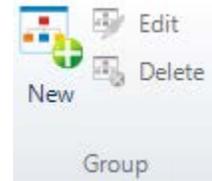
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## ACTIVITY 6

### Create and run a Report Group

1. From the Report Explorer (Start → Reports → Manage Reports) find the Group section and click New.
2. The Add Report Grouping window opens. Type a Name and Description for your report group like '[Your Initials] – Proposal Report Group.'
3. In the Reports list on the left, click the '+' next to Client Reports.
4. Now add the Cover Page report by checking the box to the left of the report name.
5. Add the Scope of Work (see step 4.)
6. Click the '+' next to the report called Proposal Summary. Then check the box next to the 'By System' definition.
7. Next add the Proposal With Images report using the definition from the last activity:
  - a. Click the '+' next to the report called Proposal With Images.
  - b. Then check the box next to the name of the definition you added.
8. Last, add the Contract report (see step 4.) Click Save.
9. To run this report group, return to the Project Explorer. Use the Quick Access menus across the bottom of the window (Projects → Projects.)
10. Select your project from the list. Click Reports.
11. From the Reports tab choose Other.
12. The Project Reports window opens. Scroll to the bottom and expand Report Groups.
13. Find your report group and double-click on it. The report group will run.



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# Notes

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# Training content complete

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- **Support Resources Available**
  - **D-Tools Application Home Page Links**
    - [Documentation](#) – open the Support Wiki
    - [Support Ticket](#) – open the web page to create a support ticket
    - [Chat With Us](#) – Launches Chat Support
  - **From any D-Tools software interface, click Learn More**
    - Found in the upper-right corner
    - Launches the Support Wiki
  - **Open the Support Wiki directly at [support.d-tools.com](http://support.d-tools.com)**
  - **Send an email to [support@d-toolshelp.com](mailto:support@d-toolshelp.com)**
  - **Call 866.386.6571**

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