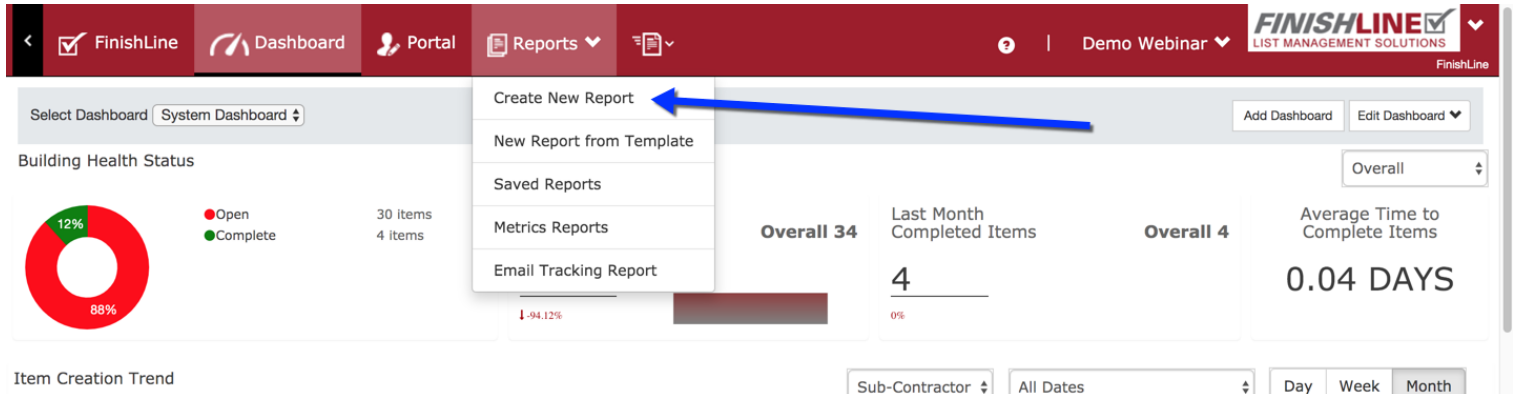


NOTE: There are many different types of custom reports you can create, but this example will demonstrate how to create a report for ALL items for a single subcontractor in a given month.

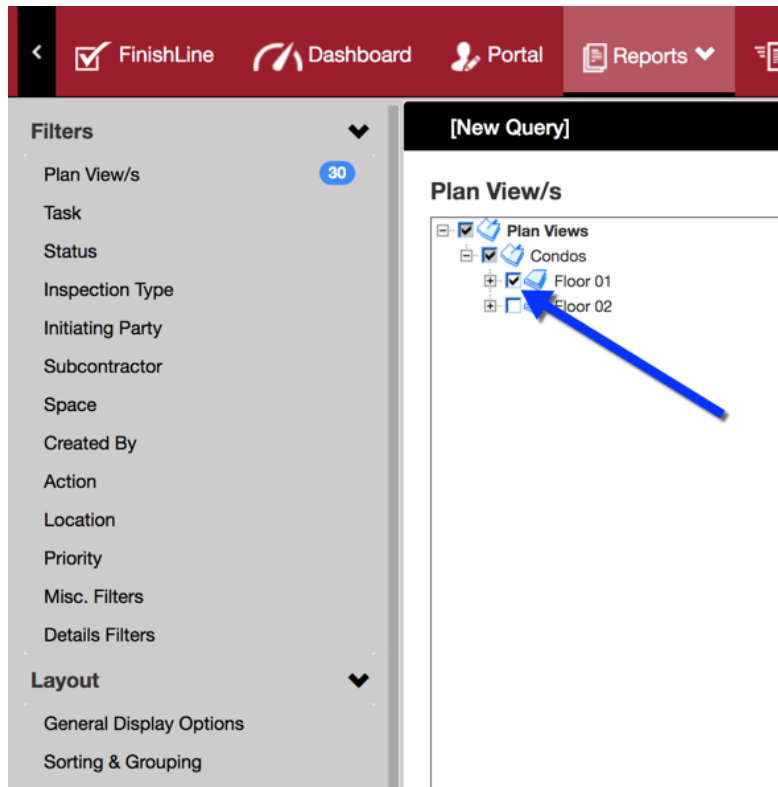


The screenshot shows the FinishLine dashboard interface. At the top, there is a navigation bar with tabs for FinishLine, Dashboard, Portal, and Reports. The Reports tab is active, and a dropdown menu is open, showing options: Create New Report, New Report from Template, Saved Reports, Metrics Reports, and Email Tracking Report. A blue arrow points to the 'Create New Report' option. Below the navigation bar, the dashboard displays various metrics: Building Health Status (a donut chart showing 12% Open and 88% Complete), Overall 34, Last Month Completed Items (4), Overall 4, and Average Time to Complete Items (0.04 DAYS). At the bottom, there is a filter section for Sub-Contractor, All Dates, and a view selector (Day, Week, Month).

From the Dashboard, click “Create New Report” in the Reports dropdown menu.

Choose the project area for your report.

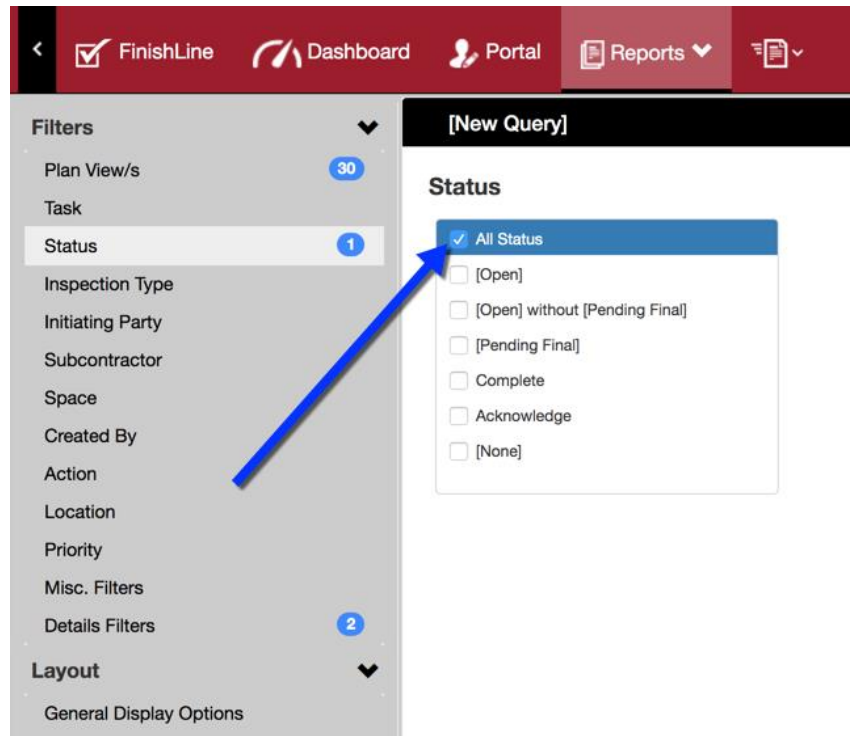
We’ve selected the first floor in a Condo project.



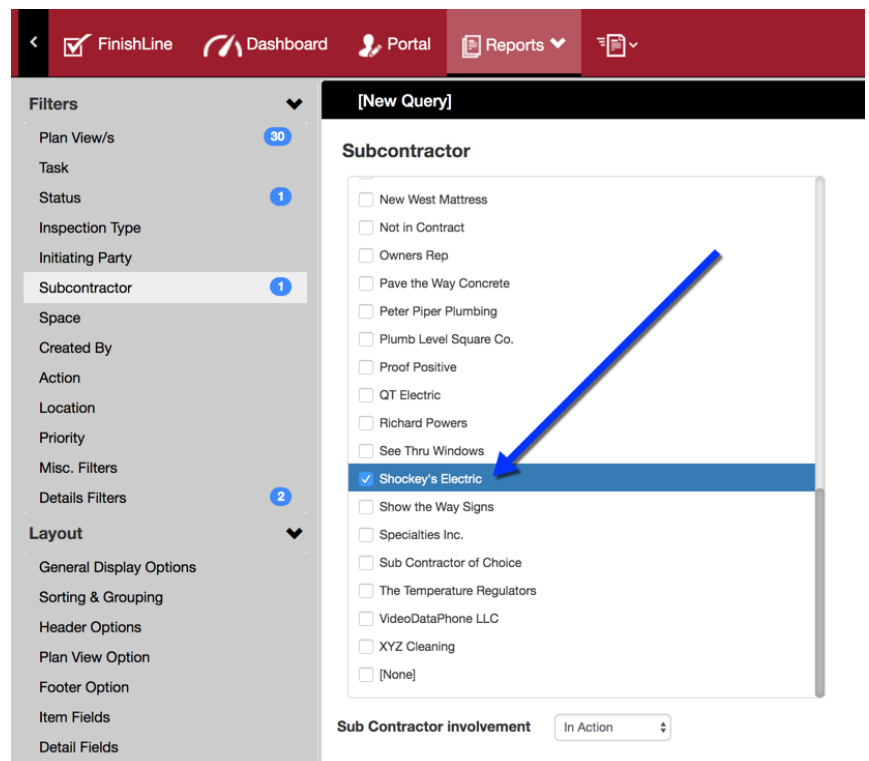
The screenshot shows the 'New Query' dialog box in the FinishLine application. On the left, there is a 'Filters' section with various categories: Plan View/s (30), Task, Status, Inspection Type, Initiating Party, Subcontractor, Space, Created By, Action, Location, Priority, Misc. Filters, and Details Filters. Below this is a 'Layout' section with General Display Options and Sorting & Grouping. On the right, there is a 'Plan View/s' section with a tree view. The tree view shows 'Plan Views' expanded, with 'Condos' selected. Under 'Condos', 'Floor 01' is selected, and 'Floor 02' is also visible. A blue arrow points to the 'Floor 01' selection.

For this particular example, this report will show ALL items for a single sub.

Select the Status filter, then select the box for "All Status".



Select a subcontractor. We're going to choose an electrician.



From the “Misc. Filters” tab you’ll need select a date range. We will pick dates to run a report for the month of February.

1) Select “Custom” from the “Date Range” dropdown menu.

2) Then select the custom dates, we’ve picked the range of first day in Feb – the last day in Feb.

[New Query]

Misc. Filters

Has Attached Files? All

Workorder #

ID (System)

Comments

1 Date Field Creation Date:

2 Date Range Custom

02/01/2020 02/29/2020

Date From Date To

Let’s make a few last edits on the Item Fields tab.

1) Scroll down and select the “Created by” option. Use the Drag handle to bring it to second place in the “Item Fields” list.

2) Unselect the “Location”.

3) Unselect the “Empty Column”.

4) Now Save the report.

[New Query]

Item Fields

Drag Handle	Show	Field	Label
	<input checked="" type="checkbox"/>	#	#
	<input checked="" type="checkbox"/>	Created By	Created By
	<input checked="" type="checkbox"/>	Type	Type
	<input checked="" type="checkbox"/>	Task	Task
	<input checked="" type="checkbox"/>	Description	Description
	<input checked="" type="checkbox"/>	Action	Action
	<input checked="" type="checkbox"/>	Sub Contractor	Sub Contractor
	<input checked="" type="checkbox"/>	Comments	Comments <input checked="" type="checkbox"/> 2nd Line
	<input checked="" type="checkbox"/>	Due Date	Due Date
	<input type="checkbox"/>	Location	Location
	<input type="checkbox"/>	Empty Column	Initials
	<input type="checkbox"/>	Icon	Icon
	<input type="checkbox"/>	Expanded Description	Expanded Description
	<input type="checkbox"/>	Description Comment	Description Comment
	<input type="checkbox"/>	Priority	Priority
	<input type="checkbox"/>	Space	Space
	<input type="checkbox"/>	Sub Contractor Cell	Sub Contractor Cell

1

2

3

4

Save Create Report

1) Add a Report Name and Description

2) Select the “Quick Report” box (this will make it more accessible and easier to run in the future)

3) Select the “Save as Template” box (this will enable you to modify the report in the future without having to make as many selections)

4) Select the “Access Settings” for the report. (“Private” limits the report to you. If you want to share it, select the “Group” option and make your selections from the dropdown menu.)

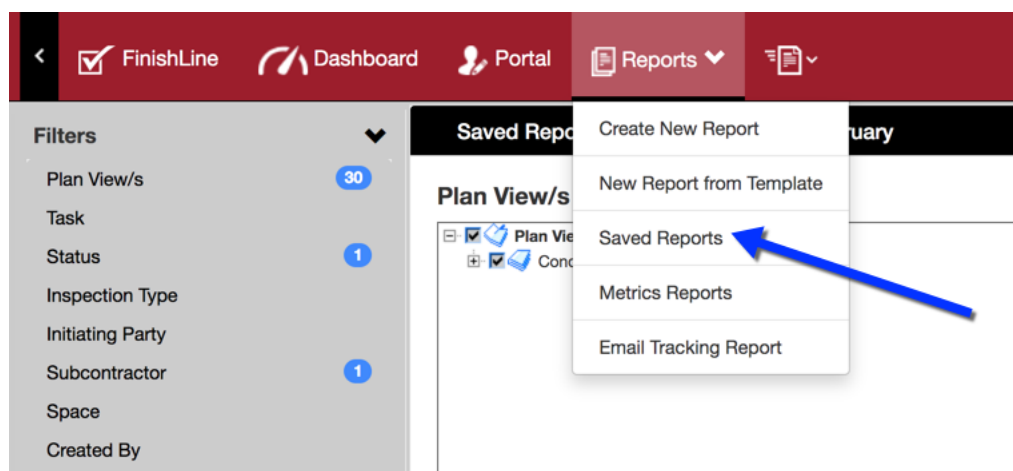
5) Scroll down the page and Save it.

The screenshot shows the 'SAVE REPORT: [NEW]' form. The form has a red header bar with navigation links: FinishLine, Dashboard, Portal, Reports, and a document icon. The form fields are as follows:

- Report Name:** Electrical Items for February
- Description:** All items assigned to Shockey's during February
- Active:** ☒
- Projects:** ☒ FinishLine
- Quick Report?:** ☒
- Save as Template?:** ☒
- Access Settings:** ☐ Private ☒ Group. Below this is a dropdown menu showing 'FinishLine - Punch User Webinar' and a 'View' button.

At the bottom of the form are 'Save' and 'Cancel' buttons. Numbered arrows indicate the following steps:

- Arrow 1 points to the 'Report Name' field.
- Arrow 2 points to the 'Quick Report?' checkbox.
- Arrow 3 points to the 'Save as Template?' checkbox.
- Arrow 4 points to the 'Access Settings' section, specifically the 'Group' radio button and the dropdown menu.
- Arrow 5 points to the 'Save' button.



Now that the custom report has been created and saved. It is now accessible via Saved Reports.

Click to here to run the new Saved report!

SAVED REPORTS

Show 50 entries

Report Name	Report Style	Access Type
By unit: All Statuses - Best for checklist reports	CustomReport	Group
Electrical Items for February	CustomReport	Group

Click the Report name link in the Saved Reports section to run the new report.

FinishLine

100%

Produce or Email Report...

02/26/20

Condos / Floor 01 / 101 (Type A_R) - Shockey's Electric

#	Created By	Type	Task	Description	Action	Sub Contractor	Due Date
2	DW	1-Interior	Elect - Power/Lighting (T)	Inoperative	Repair/Replace	Shockey's Electric	3/2/20
Repair/Replace 3/2/20 Shockey's Electric							
6	DW	1-Interior	Elect - Power/Lighting (T)	Inoperative	Repair/Replace	Shockey's Electric	3/2/20

Viola! There is the new saved report. Produce, email, view, etc. as you wish.