Reports

FinishLine Item Structure

To fully understand FinishLine Reports, you must first understand something about the structure of the FinishLine database.

Whether you use FinishLine for punch lists, completion lists, QA/QC, checklists or whatever, the following principals apply.

When you create a punch or add to a completion list you are creating an ITEM.

Each ITEM contains a variety of field data, and, is linked to, at least, 2 Actions. 1 of the actions is what you want the project resource (sub) to do.

The other Action(s) sets the status of the ITEM typically to Complete.

The simplest example would be be:

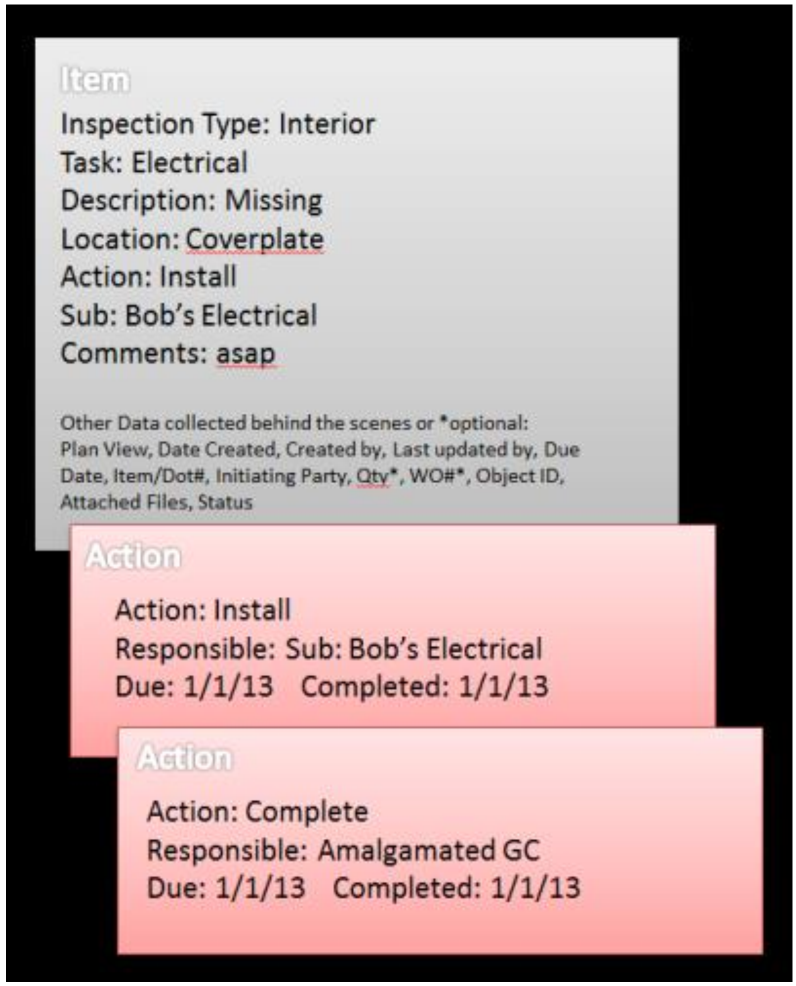
Inspection Type: Interior
Task: Electrical
Description: Missing
Location: Cover Plate
Action: Install
Sub: Bob's Electrical

In this example, the ITEM is a Missing Cover Plate and the Action is "Install". However, there is another action called "Complete".

When the sub does the work, the "Install" action is completed by the system placing a date in the Date Completed field; and when the final authority marks the item complete, the "Complete" action is completed by the system placing a date in the Date Completed field.

Note: These two processes are done automatically with the Complete button or filling out completion information on the portal report.

FinishLine Item Structure



This is the simplest example. An item could have 2 or 20 or 200 actions.

Also actions can hold more than just the data above. In addition to the name, responsible sub, due date and completion date; you can store: qty, cost, markup rate, (calculated Total), Responsible User, Comments, User defined field which can be formatted as drop down, checkboxes, single/multi-line text, two option buttons etc. and most importantly other actions.

Standard Reports

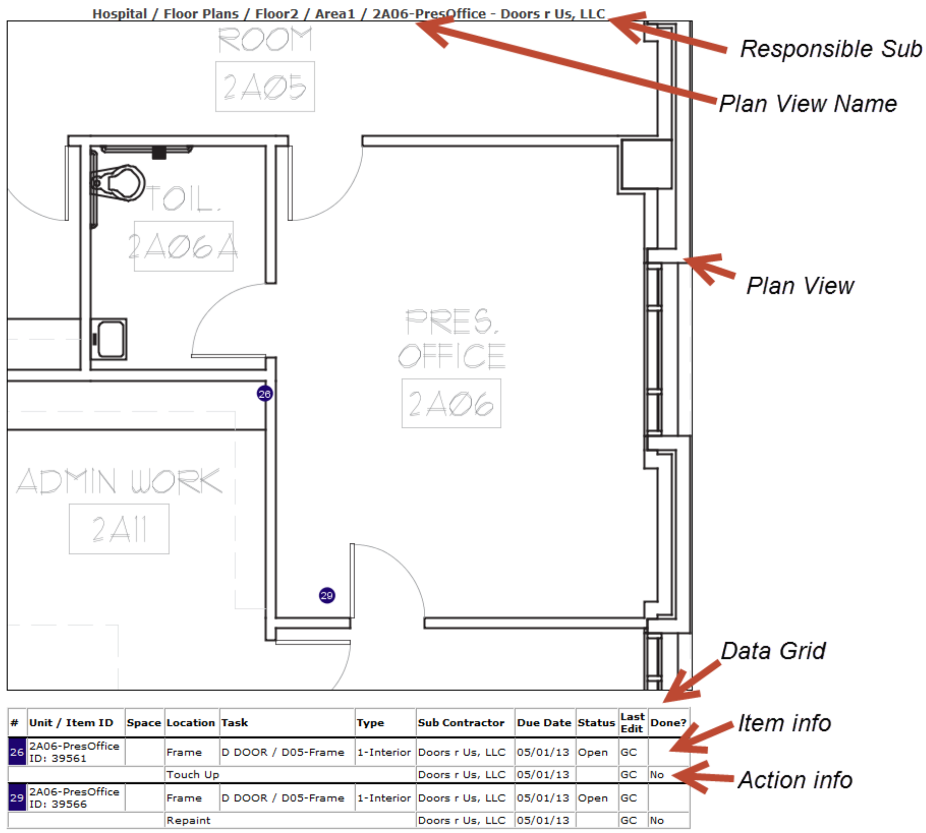
By default FinishLine produces a report like this.

The report is sorted by sub-contractor, by Plan View/Unit. Each sub would receive a report of just their own items for each plan view.

The first line of the Data grid is information from the ITEM.

The second line of the Data grid is information from the Action.

NOTE: The “Complete” action is hidden from reports by default.



#	Unit / Item ID	Space	Location	Task	Type	Sub Contractor	Due Date	Status	Last Edit	Done?
26	2A06-PresOffice ID: 39561		Frame	D DOOR / D05-Frame	1-Interior	Doors r Us, LLC	05/01/13	Open	GC	
			Touch Up			Doors r Us, LLC	05/01/13		GC	No
29	2A06-PresOffice ID: 39566		Frame	D DOOR / D05-Frame	1-Interior	Doors r Us, LLC	05/01/13	Open	GC	
			Repaint			Doors r Us, LLC	05/01/13		GC	No

Report Criteria

Item Criteria (Punch List tab)

Following the theme of ITEM and ACTION(s), there are two tabs on the report criteria screen.
Punch List/ITEM and Activity.

On the ITEM Tab you can select the following criteria:

- Plan View
- Task/Descriptions
- Status
- Inspection Type
- Initiating Party
- Sub-Contractor / including whether sub has involvement in Item/Action or Both
- Space
- Created by (initiating user)
- Comments
- Creation, Due or Complete Date

Also you can control the sort and grouping order, control page breaks, choose what information to display on the report and which report style you would like to use.

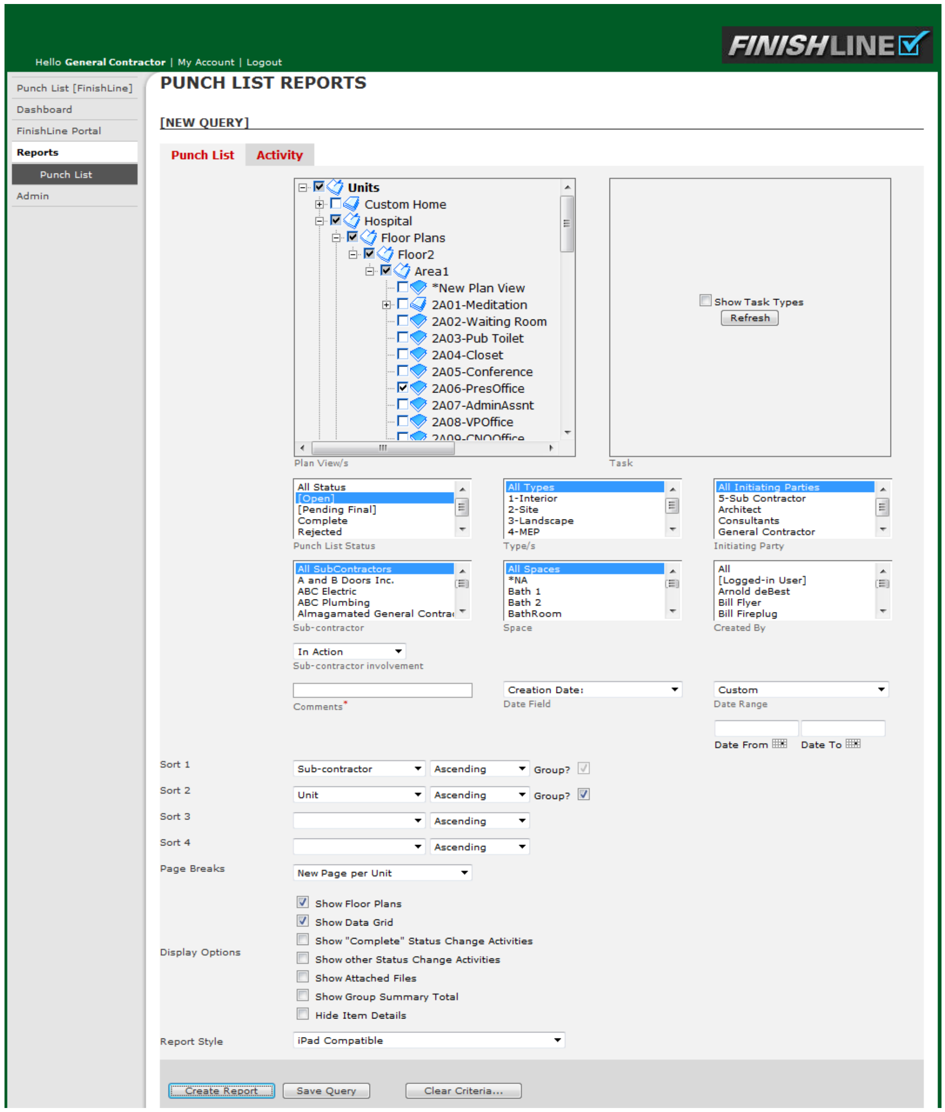
Finally there is the ability to Save the Query/Report to be easily recalled at a later date.

All the criteria are dynamic and applied in real time when recalled.

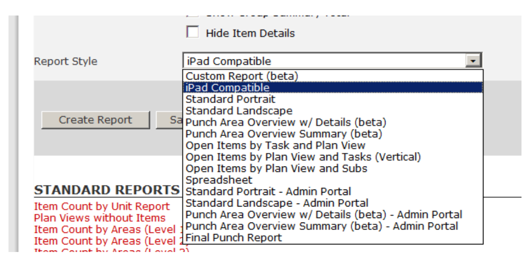
A report created and saved today will show the relevant data 1 year from now.

We highly recommend you start with the default settings and then experiment with the various criteria and format options.

Punch List Tab – ITEM criteria



NOTE: There are some Report Styles that work better than others on specific devices and under certain conditions. Others are formatted in such a way that they don't lend themselves to certain types of display options and sorting and grouping options. Generally the iPad Compatible and Custom Report are the most common and compatible in the most situations.



Action Criteria (Activity Tab)

You can add to the ITEM criteria by making alterations on the Activity Tab.

Be aware that as you add criteria, you are becoming more selective and limiting the information your report will show.

You can limit the report to Items with Actions that meet certain criteria.

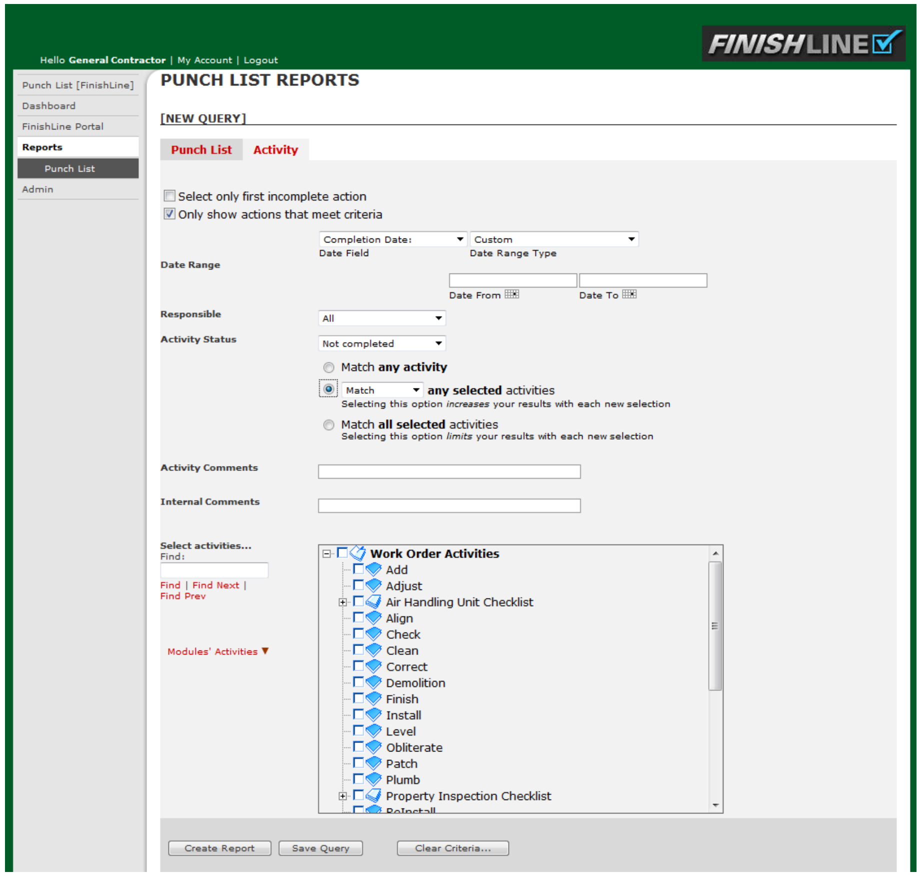
Date Criteria can be specific (Jan 1, 2013-Jan 31, 2013) or relative. Relative dates shift at the time that you create the report. If you use, for example, a relative date like "Today". If you run the report a week from now, it will be for that day.

Other choices include:

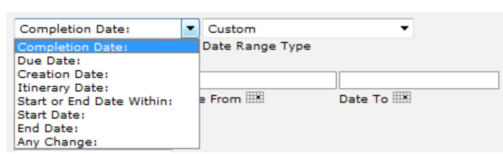
- Responsible user
- Action Status
- Whether to Match any Action
- Match selected Actions
- Don't match selected Actions or
- Match ALL selected (very limiting)
- Actions with specific comments

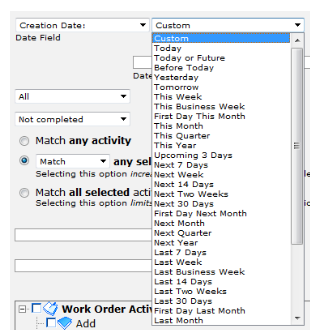
Again, it is important to experiment. As you add Action criteria to your ITEM criteria the number of records selected will be fewer and fewer.

Activity Tab – Action Criteria



Action Date Criteria





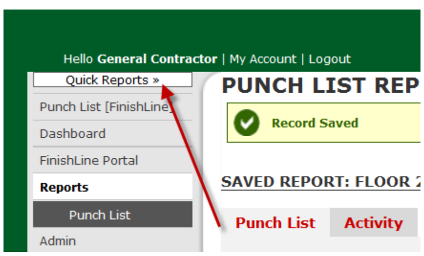
Saving Reports

Any report/query criteria can be saved. Once saved you can retrieve the report and the data that you will see will be current / real time data.

The saved reports are listed at the bottom of the reports screen and can be Viewed, Edited or Deleted.

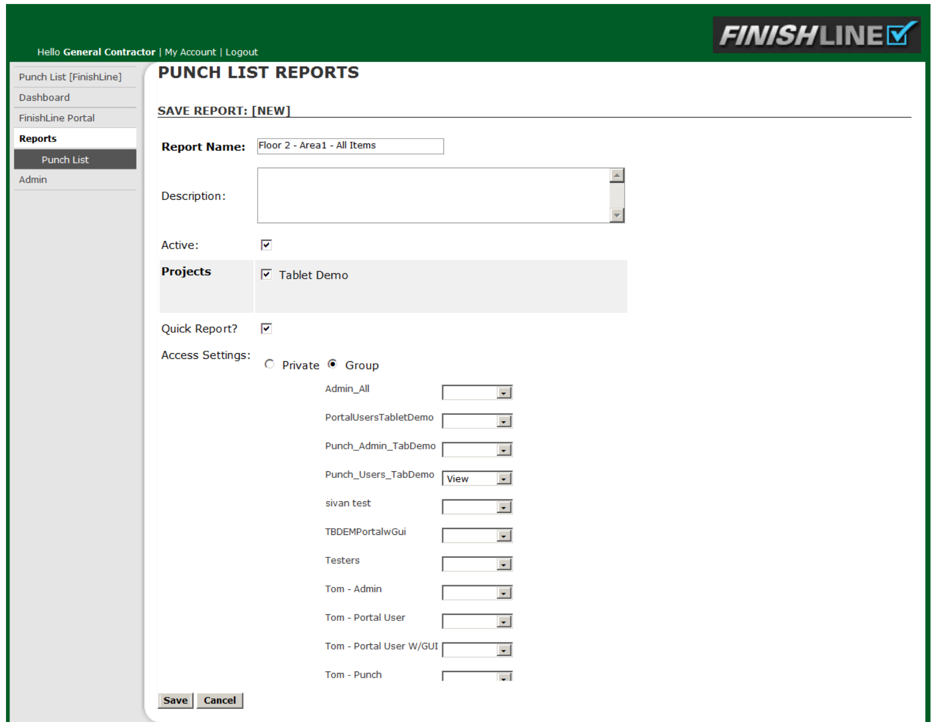
You choose whether the Report is Private or a Group Report and you choose which user groups can view the report from a list of Security Groups.

You can also save a report to be a Quick Report and they can be retrieved using the pull-down in the upper left labeled "Quick Reports"

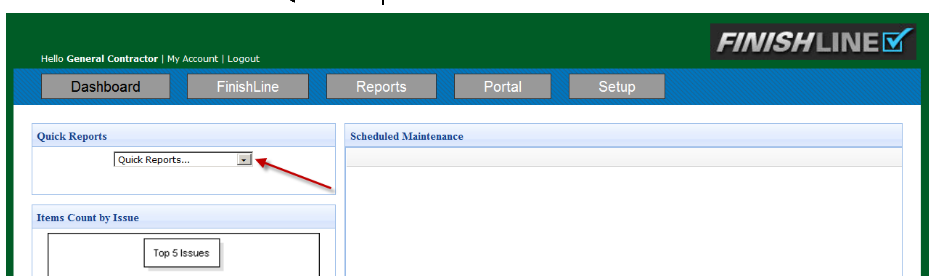


Note: When using dates in a saved report, use one of the relative date ranges like, This Month, Today, Last Week, This Quarter, etc.

Saving Reports

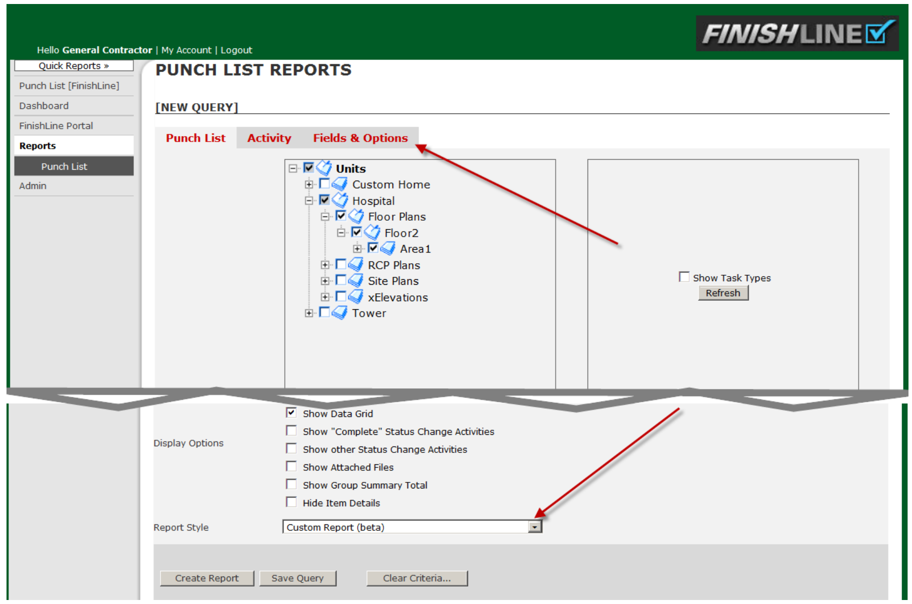


Quick Reports on the Dashboard

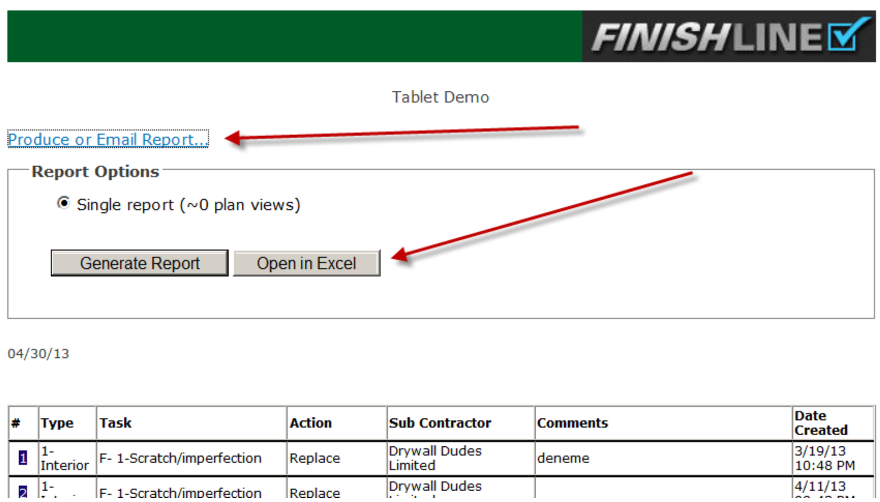


Custom Report Style

When you select the Custom Report Style FinishLine will present you with a third Tab, "Fields and Options".



NOTE: When you "Produce or Email" a custom report one of the options will be to "Export to Excel"



Fields and Options

This screen allows you select what data you see in what order from both Items and Actions.

By default, the Action data shows below the Item data but, you can show both Item and Action data on the same Row.

Each data element available can be turned on and off with the “Show” checkmark.

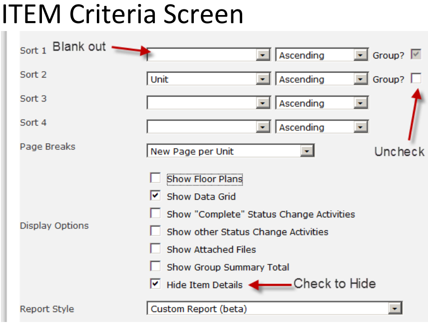
They can be given a custom label by typing it in the Label column.

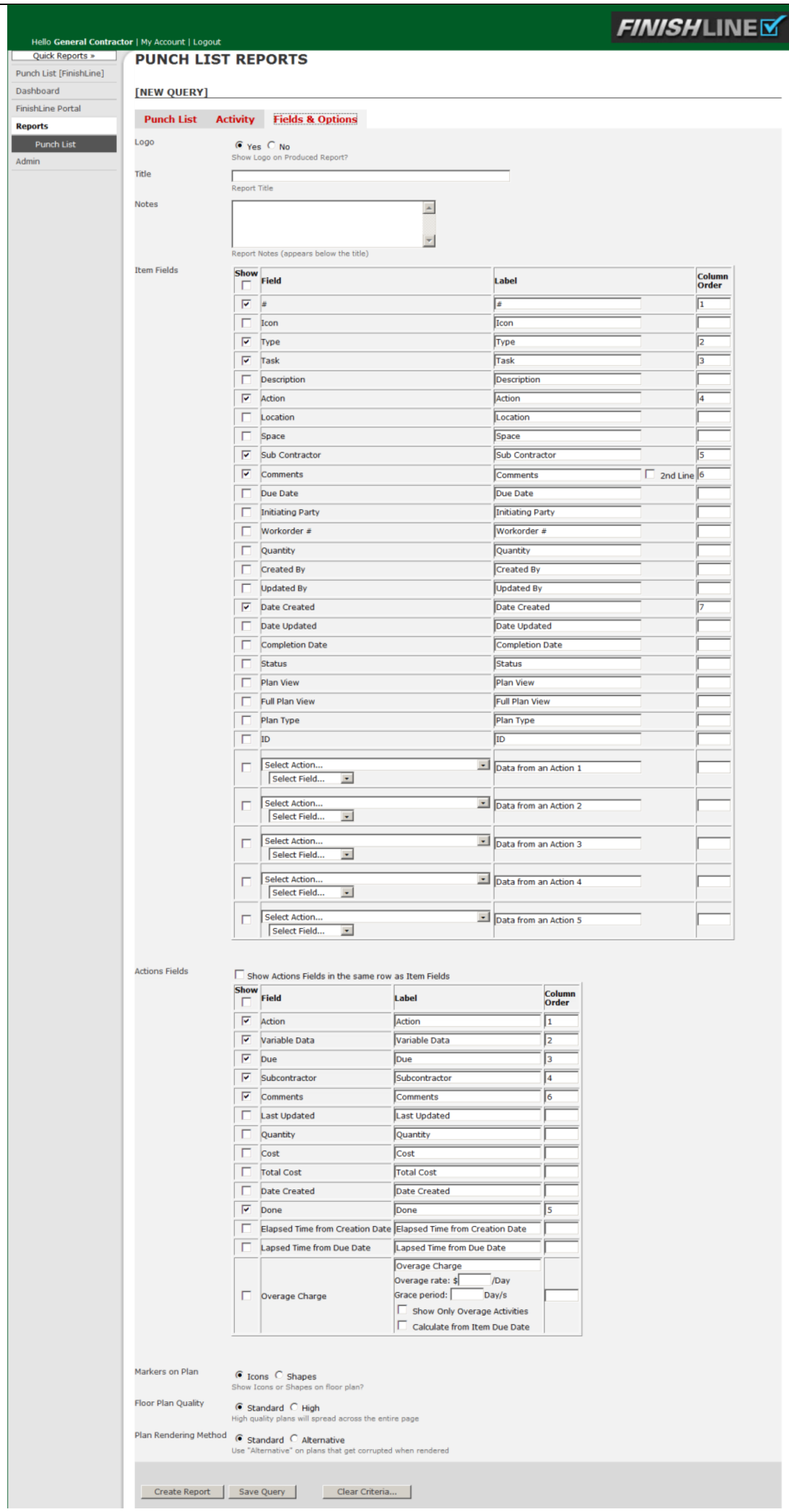
You control the Column order by placing the numeric value in the Column order column.

Notes: The column order, as a best practice should be in 1,2,3,4 etc. in whole numbers, but you can squeeze in a column by numbering it with decimals. Example: 1.5 would be after 1 and before 2. Also if you want data on the same row from ITEMS and Actions be aware of the column order of each.

To Create a straight data output that looks like a spreadsheet do the following.

ITEM Criteria Screen





Custom Reports – Special Fields

FinishLine can calculate specific information about Elapsed, Lapsed and Calculate overage charges for you.

Elapsed time and Lapsed time both take into account weekends and US Holidays. (these are not currently adjustable but will be on future releases)

Elapsed time is the time from the date an ITEM is created to the date it is completed **OR** the current date, if not completed. It is not used in the overage calculation but can be used for metrics reports.

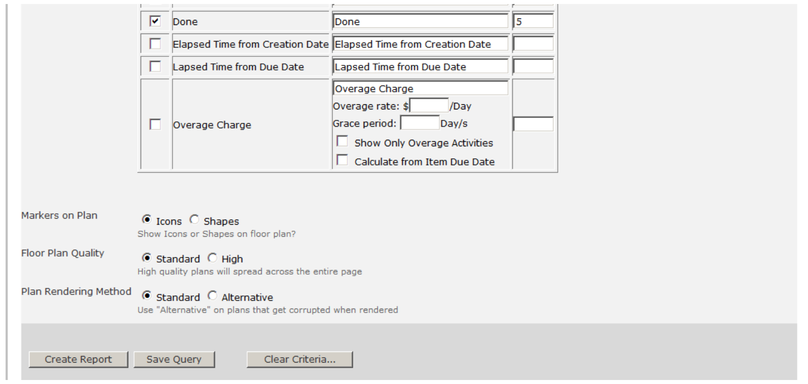
Lapsed time is the time from the Due Date of the ITEM or Action, to Completion or the current date if the ITEM or Action isn't complete.

NOTE: Lapsed time CAN be and hopefully is a negative number in most cases. (The item should be done before the Due Date)

Overage Charge is a special calculated filed. You can put in a daily overage amount and a Grace period if you want and FinishLine will calculate overage charges on, typically, overdue Punch items.

The two options are to force the calculation on the ITEM due date and to ONLY report on items that result in an overage charge (positive values after the calculation)

Special Fields



The overage calculation is:

For completed items:

Completion Date – Due Date – Weekend days – Holidays – Grace Period. If the resulting value is positive then value*Overage rate = Overage Charge

For un-completed items:

Todays Date – Due Date – Weekend days – Holidays – Grace Period. If the resulting value is positive, then value*Overage rate = Overage Charge

Metrics Reports

FinishLine has a variety of reporting options to meet most any need.

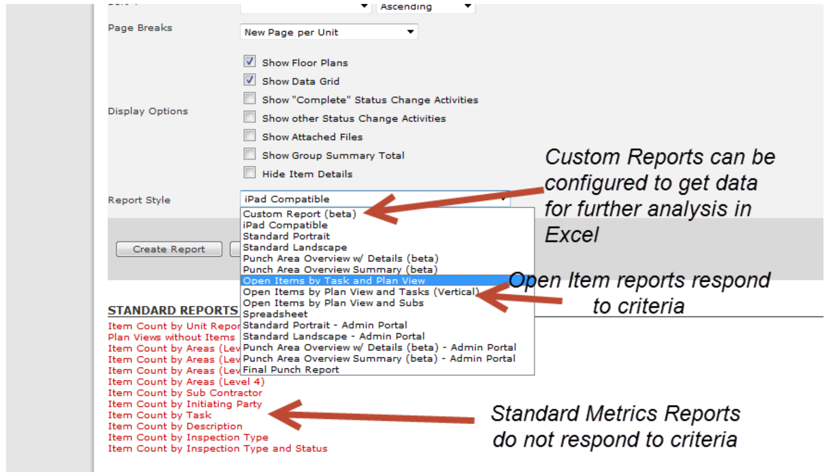
The Standard Reports listed below do some quick analysis. They are primarily Item counts and do not respond to Item or Action Criteria.

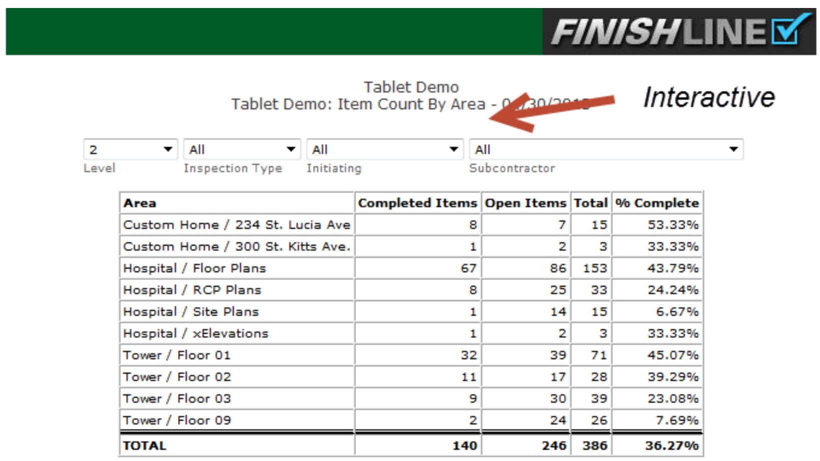
Several of the Standard reports have interactive controls that allow you to quickly compare areas, inspection types, Subs, Initiating Parties etc.

There are also some Report Styles that produce metrics reports. These styles do respond to the criteria.

- Open Items by Task and Plan View
- Open Items by Plan View and Tasks (V)
- Open Items by Plan View and Subs

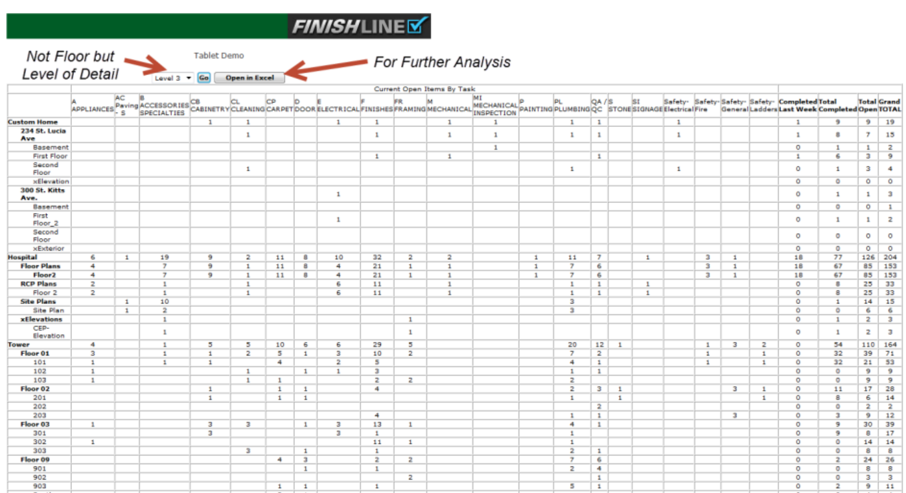
Custom Reports can be configured to be used for export in Excel.





Area	Completed Items	Open Items	Total	% Complete
Custom Home / 234 St. Lucia Ave	8	7	15	53.33%
Custom Home / 300 St. Kitts Ave.	1	2	3	33.33%
Hospital / Floor Plans	67	86	153	43.79%
Hospital / RCP Plans	8	25	33	24.24%
Hospital / Site Plans	1	14	15	6.67%
Hospital / xElevations	1	2	3	33.33%
Tower / Floor 01	32	39	71	45.07%
Tower / Floor 02	11	17	28	39.29%
Tower / Floor 03	9	30	39	23.08%
Tower / Floor 09	2	24	26	7.69%
TOTAL	140	246	386	36.27%

Open Items by Task and Plan View



Metrics Reports - Continued

Other examples of the Metrics reports

Open Items by Task and Plan View – Vertical

Open Items by Task and Plan View - Vertical

Tablet Demo

Level 1 Go Open in Excel

LOCATION/Task	Open	Pending Final	Completed	Total	% Pending Final	% Completed
Custom Home	**10**	**2**	**9**	**19**	**20%**	**47%**
B1-Safety Bar	0	0	1	1	0%	100%
CB03-Hardware	1	0	0	1	0%	0%
CL- 7 Grout	1	0	0	1	0%	0%
CP06-Frays @ edges	0	0	1	1	0%	100%
E- 1-Fixtures	0	0	2	2	0%	100%
E- 3-Fixture/element	1	1	1	2	50%	50%
F- 4-Exposed nail	0	0	1	1	0%	100%
F- 6-Visible joint	1	0	1	2	0%	50%
M- 4-Part	1	0	0	1	0%	0%
Air Handler	1	0	0	1	0%	0%
PL- 4-Caulk/recaulk fixture	1	0	0	1	0%	0%
In Wall	1	0	0	1	0%	0%
SF-EL-Cords-No Prong	1	0	1	2	0%	50%
SF-GEN-Tripping Hazard	0	0	1	1	0%	100%

Open Items by Plan View and Subs

Open Items by Plan View and Subs

Tablet Demo

Level 1 Go Open in Excel

LOCATION/Sub	Open	Completed By Sub	Cleared	Total	% Completed by Sub	% Cleared
Hospital	**127**	**26**	**77**	**204**	**20%**	**38%**
ABC Plumbing	4	0	1	5	0%	20%
Almagamated General Contracting	118	17	73	191	94%	38%
Civil Engineer Inc.	1	0	0	1	0%	0%
Concrete Constructors, Inc.	1	0	0	1	0%	0%
Doors r Us, LLC	13	0	13	26	0%	50%
Drywall Dudes Limited	31	11	12	43	26%	28%
Epoxy Royal, LLC	2	1	1	3	50%	33%
Fire Protect Builders, LLC	7	0	7	14	0%	50%
Framing Finishing and Done, LLC	2	0	0	2	0%	0%
Furniture Bath Accessories	10	1	5	15	7%	33%
General Electric Appliances	3	0	2	5	0%	40%
General Flooring Supply Inc.	11	2	8	19	11%	42%
Glazier Supply inc	0	0	1	1	0%	100%
Gynormus Plumbing and Mechanical	17	0	15	32	0%	47%
HVAC Mechanical Inc.	7	0	6	13	0%	46%
Heat Sealer Inc.	16	0	5	21	0%	24%
Iron and Steel Inc.	0	0	1	1	0%	100%
Millwork Specialties, LLC	10	0	3	13	0%	23%
QT Electric	16	4	13	29	24%	45%
Specialties Inc.	8	0	7	15	0%	47%
SureCoat Painting, Inc.	29	10	14	43	333%	33%
Whistle Blower Janitorial	2	1	4	6	17%	67%

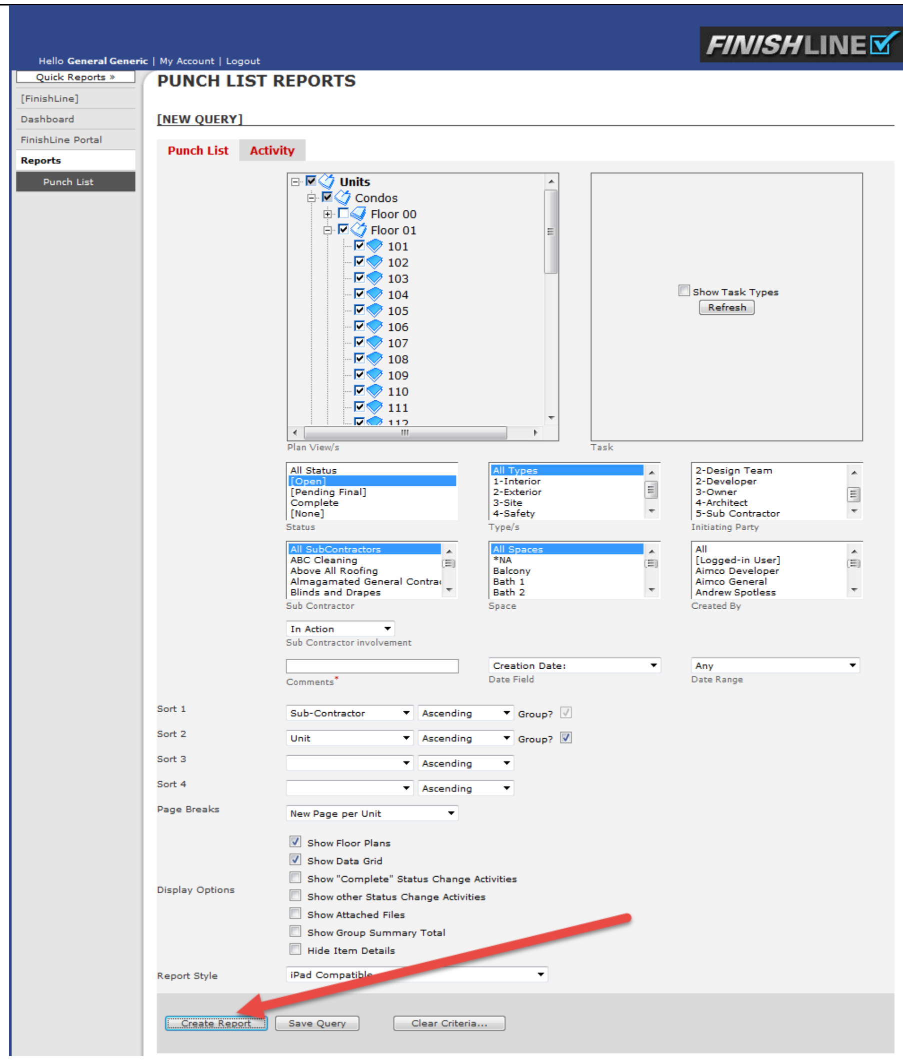
Custom Reports can be configured to be used for export in Excel and further analysis.

FinishLine is constantly expanding and improving the report offerings. If you have a need or an idea for a report that is different, let us know.

Creating and Distributing Reports

Once you have all the criteria set the way that you want, you can Create the Report by clicking on Create Report below the criteria.

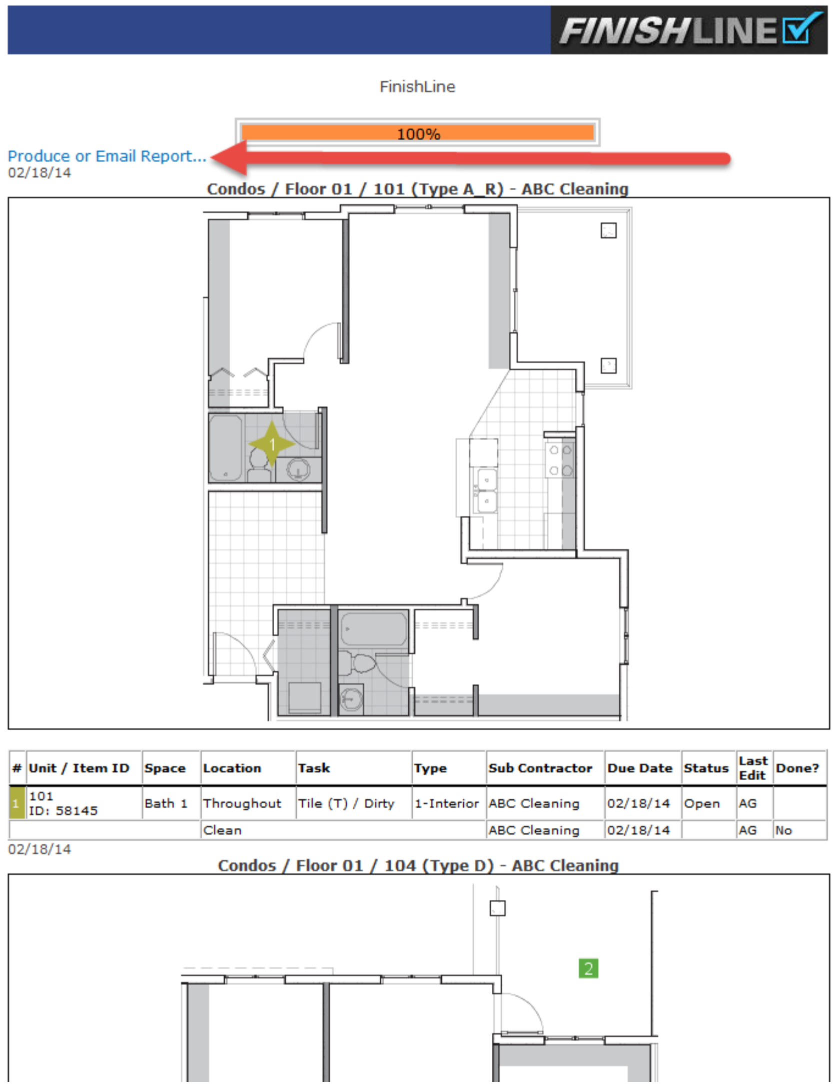
You can also Save the report Query by clicking on Save Query which is covered above.



Previewing Reports

Creating reports results in an on-screen preview of the report.

If you are satisfied with the content and format of the report, you can Produce it to a PDF and/or Email it out to the relevant parties.



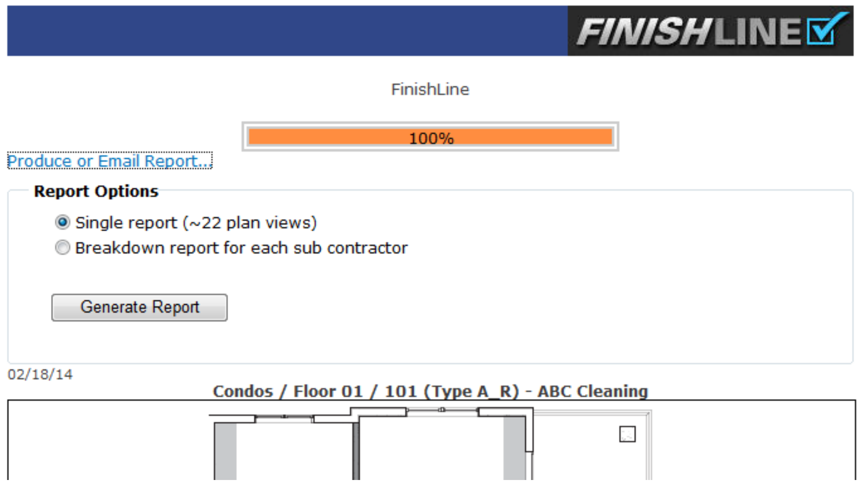
Producing and Emailing

When you produce the report FinishLine will create a PDF version of the report that can be opened, saved, or emailed to the involved parties.

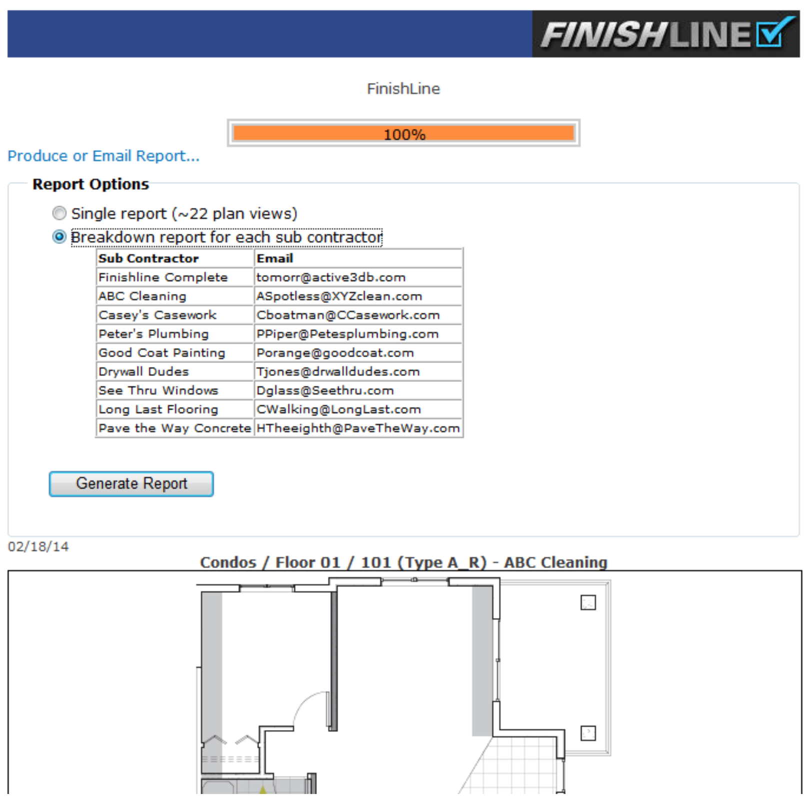
In many cases your choice is to either produce a Single report or to Breakdown the report for each Sub-Contractor.

NOTE: Some reports, not sorted and grouped by Sub, don't allow the breakdown option.

Single Report



Broken Down by each Sub-Contractor



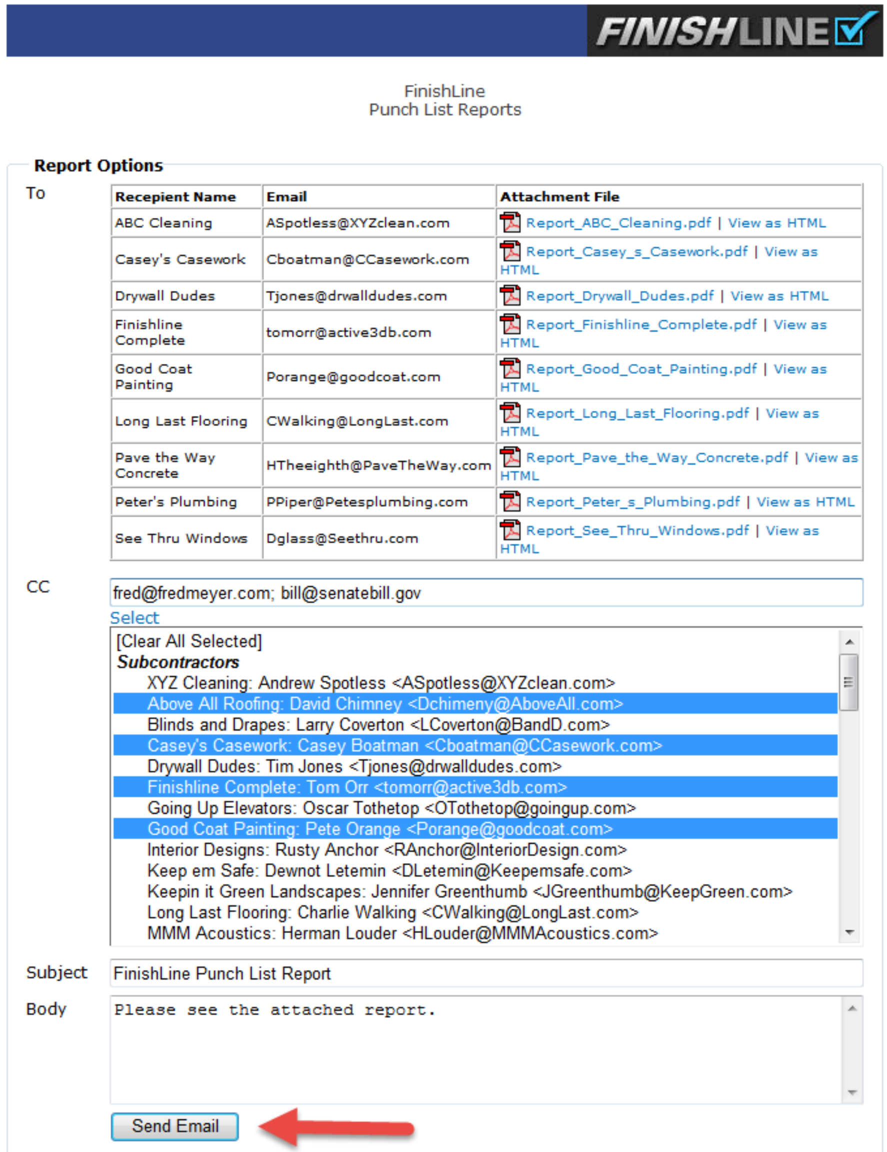
Sub Contractor	Email
Finishline Complete	tomorr@active3db.com
ABC Cleaning	ASpotless@XYZclean.com
Casey's Casework	Cboatman@CCasework.com
Peter's Plumbing	PPiper@Petesplumbing.com
Good Coat Painting	Porange@goodcoat.com
Drywall Dudes	Tjones@drwalldudes.com
See Thru Windows	Dglass@Seethru.com
Long Last Flooring	CWalking@LongLast.com
Pave the Way Concrete	HTheeighth@PaveTheWay.com

Email Report

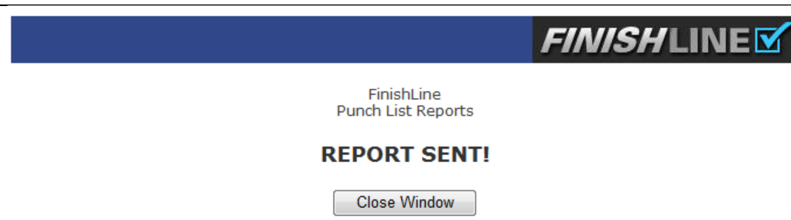
When you generate the report from the previous screen FinishLine creates the PDF's and prepares and individual email to each sub.

You can edit the Subject and Body of the email and cc: others by either typing the email address in the cc: box. You can cc: multiple email addresses by separating your email addresses with a semi-colon (;).

Also you can select both FinishLine sub-contractors and users from the cc: Select link. USE CTRL-CLICK to select multiple people from the list. NOTE: cc: addresses selected do not appear in the cc: box.



Congratulations



Scheduling Reports for Automatic Notification

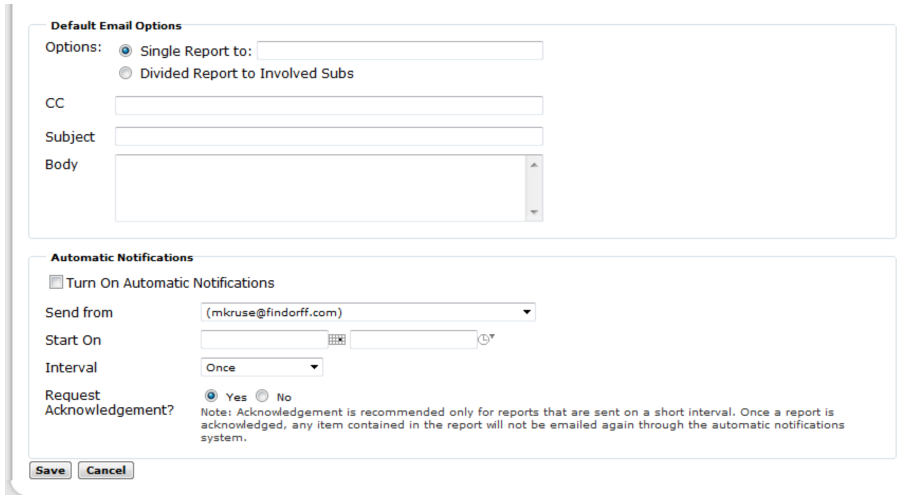
To add an automatic notification you can Edit the Criteria of any saved report and "re"-save it or if it is a new report save the report and fill out the bottom part of the screen. (see below)

These two bottom screens work together.

In the top section you need to define who the report will go to. A single report to an individual, or broken out to the various subs.

The lower section sets the schedule and who you want the email to be from. (typically yourself) . Pick a starting date and time and then an interval and whether or not you want the recipient to acknowledge. (not recommended unless the interval is very short. This is for emergency notification. (if Task/Description = Water Leak, then notify every 5 minutes until you get an acknowledgement back from the plumber that he is on his way))

FinishLine checks through your reports that have auto-notification every few minutes and sees if any of the reports results in records that match the criteria of the report. If no records are found it doesn't do or send anything. If the report results in records found, it will send a notification based on the schedule.



NOTE: We don't enthusiastically recommend using Automatic Notifications. The problem we have with automatic anything is that an action is taken without human review. If you are confident of the results you are welcome to give it a go.