



Automated Reports

Distribute Reports by Email and Schedule Them to Run Unattended

PowerPM Automated Reporting permits users to setup certain reports and distribute them to the primary management sort by email. Thus if the primary management sort is by *Partner*, each partner may receive, by email, an Excel or PDF file with his or her section of that report.

In addition, the firm may elect to generate such reports *automatically* using the Windows Task Scheduler.

A new menu item, *Auto Reports*, has been added to the Report Setup program. Reports with these new features are available through this menu.

Available Auto Reports: Four in the initial release — two brand-new — with more to come in the future!

- Daily Timesheet Report—this NEW report mines data directly from the staff timesheet files and distributes this information via email to staff supervisors, regardless of whether the time is submitted or posted. This provides management with daily oversight of staff production and timesheet compliance.
- WIP and AR Flash Report — this NEW report provides changes to WIP and AR period to date and compares it with the same period in the previous year. Designed to run as a daily flash report, distributed by email to management.
- Detailed WIP Report — distributes the relevant sections of the report as PDF to each individual in the primary management sort list (e.g. *Partner*) via email.
- Aged WIP Report — distributes the relevant sections of the report as Excel file to each individual in the primary management sort list (e.g. *Partner*) via email.

Cost: licensed at \$100 per licensed PowerPM user. For example a firm with a license for 15 timekeepers would pay just \$1500. No additional annual relicensing fee.



Key Features & Benefits

Automated Reporting provides:

- ◆ Ability to distribute reports to management via email., saving staff time and paper, and providing more timely information.
- ◆ Ability to run and distribute reports unattended using Windows Task Scheduler. This also saves staff time and supports timely and orderly operations.
- ◆ **New** Daily Timesheet Report provides first ever PowerPM reporting on timesheets, giving management a new and better way to manage the firm's work.
- ◆ **New** WIP and AR Flash Report provides better management information with daily period-to-date totals of key indicators and prior year comparisons.

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