



# 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 *unattended* using the Windows Task Scheduler.

A new menu item, *Auto Reports*, has been added to the Report Setup program.

**Available Auto Reports:** seven reports currently — five brand-new — with more to come in the future!

- **New Daily Timesheet Report**—mines the staff TrakTime data and distributes the daily summary via email to supervisors. Provides daily oversight of staff production and timesheet compliance.
- **New Timesheet Analysis Report** — reviews TrakTime data over a range of dates. May be distributed to staff supervisor *or* client/project management.
- **New WIP and AR Flash Report** — provides changes to WIP and Billings period to date and compares to same period in the previous year. Designed as a daily flash report, distributed by email to management.
- **Aged WIP and Detailed WIP Reports** — emails WIP reports to each partner or biller.
- **New TrakTime Web Timesheet Report** — shows submitted and approval status of each transaction.
- **New TrakTime Web Future Leave Report** — tracks PTO requests for supervisors.

**Cost:** For on-premises firms \$100/licensed PowerPM timekeeper. No additional annual relicensing fee. For Hosted Solution firms: \$50/licensed PowerPM timekeeper plus \$1/licensed timekeeper/month.

### Auto Reports

- WIP and A/R Flash
- Daily Timesheet Report
- Timesheet Analysis Report
- Detailed WIP
- Aged WIP
- TTWeb Timesheet Report
- TTWeb Future Leave Report

### Key Features & Benefits

#### Automated Reporting provides:

- ◆ Better, faster delivery of reports to management via email, saving staff time and paper.
- ◆ Unattended distribution of reports using Windows Task Scheduler. Saves staff time and supports timely and orderly operations.
- ◆ **New** Daily Timesheet and Timesheet Analysis Reports: a pre-upload review of timesheets; a better way to manage the firm's work.
- ◆ **New** WIP and AR Flash Reports: daily period-to-date totals of key indicators with prior year comparisons.
- ◆ **New** TrakTime Web Timesheet and Future Leave reports support online approval of time, expense and future PTO.

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