

NUTCACHE · REPORTS

_Using Reports

Sixteen reports, one screen, five steps. Learn it once and you can produce any of them.

A five-minute walkthrough

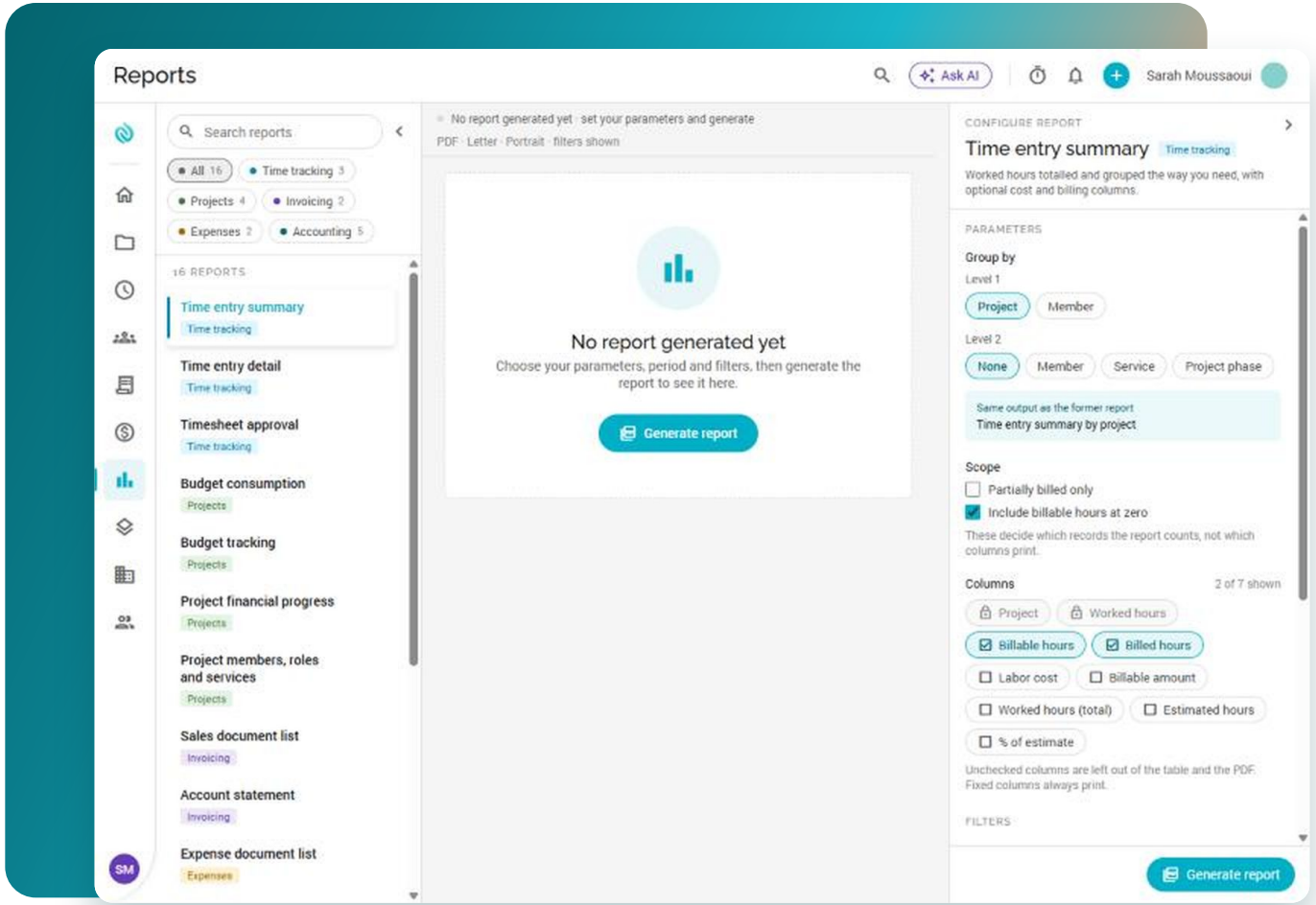
THE SCREEN

_Three parts, always the same

The list — all sixteen reports, filtered by category chip.

The preview — where the finished report appears.

The panel — parameters, columns, filters, in that order.



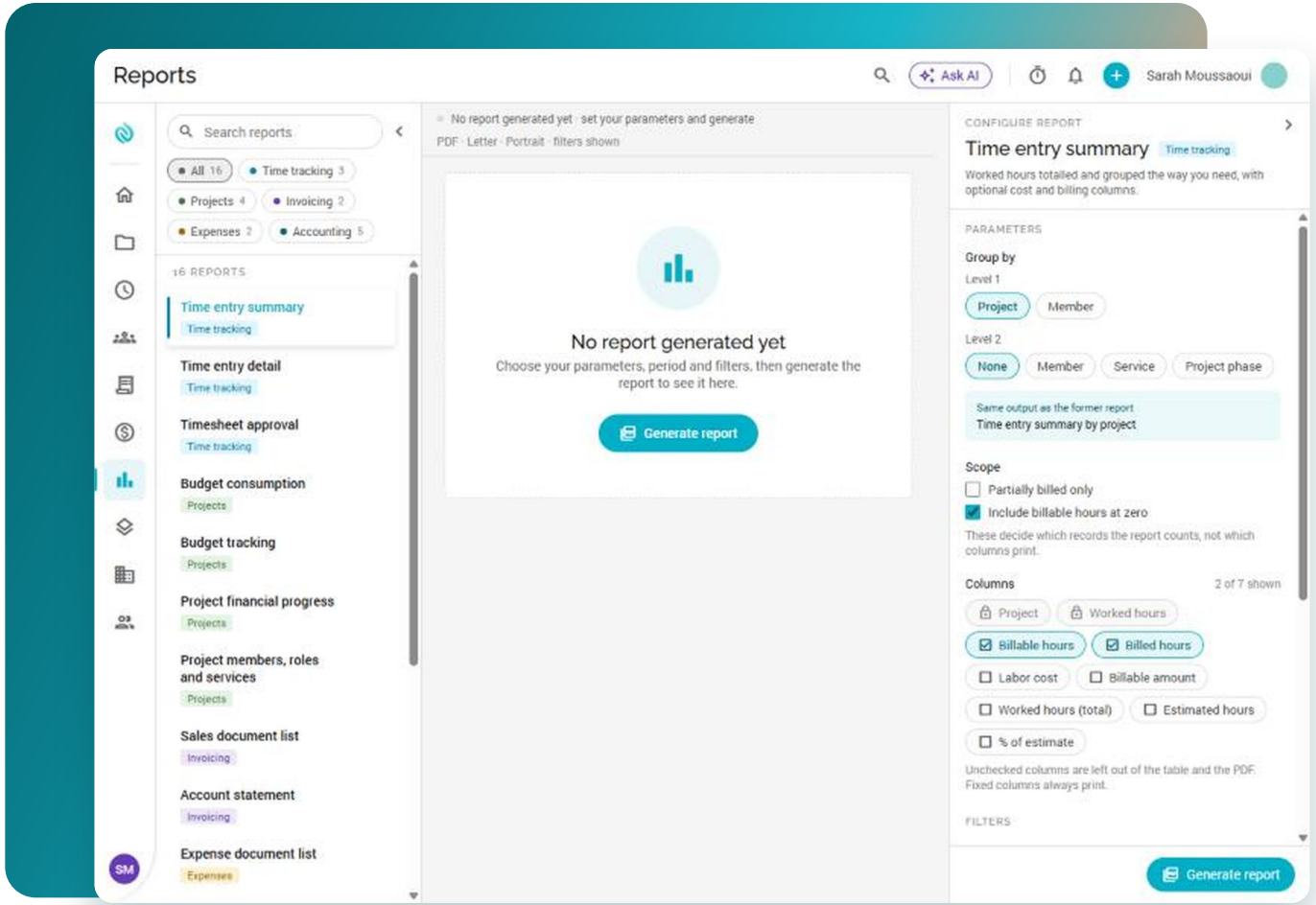
The layout never changes, whichever report you open

STEP 1 OF 5

_Pick a report

Select **Time entry summary**. The panel on the right becomes that report's settings.

> Nothing is calculated yet. Changing settings costs you nothing until you generate.



Worked example: hours this month, by project and member

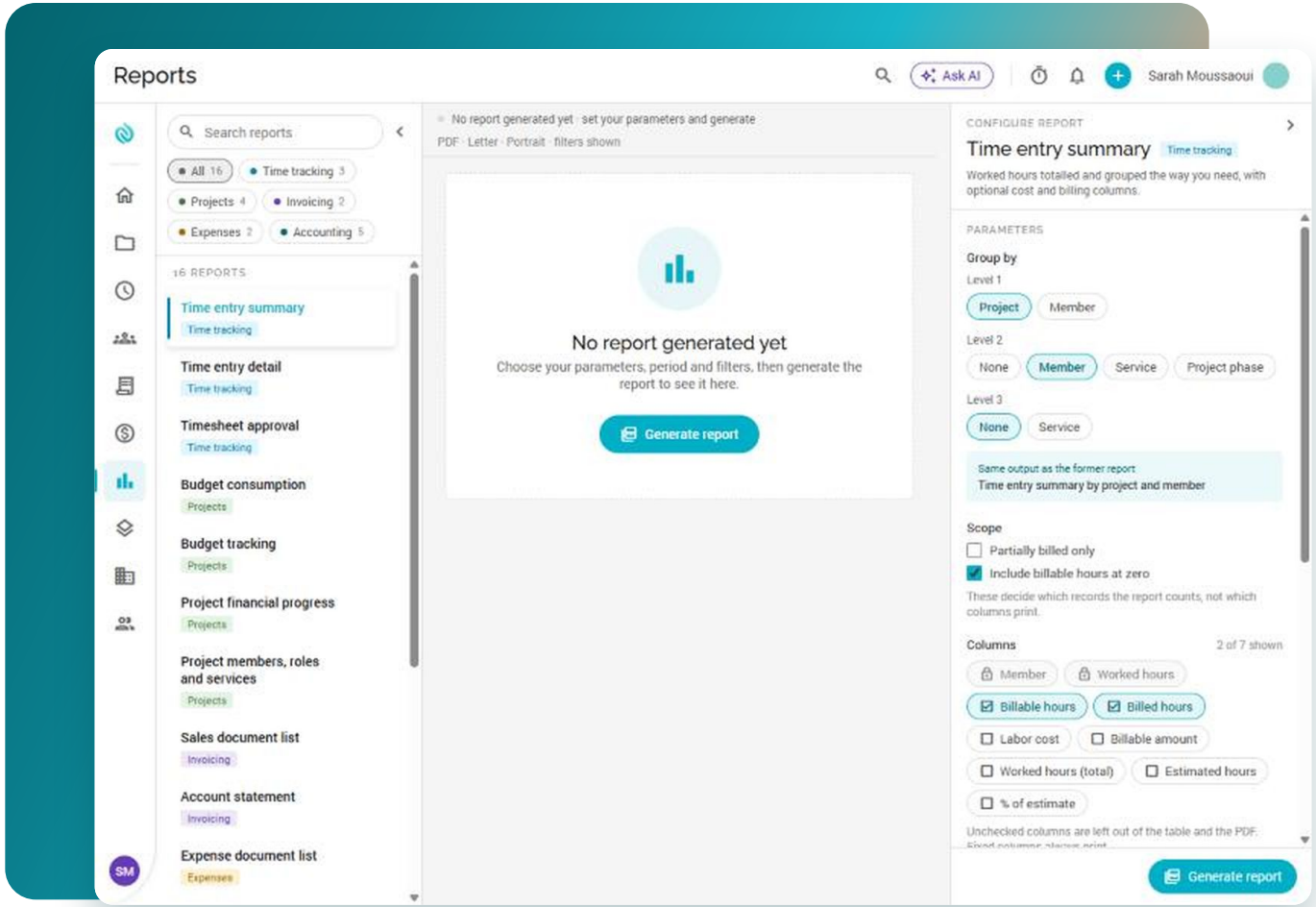
STEP 2 OF 5

_Set the parameters

Group by decides the shape of the table. Level 1 is the outer grouping, Level 2 nests inside it.

Choose **Project** then **Member**: one block per project, with its people underneath.

> The highlighted line names the report you used to run in the old module — proof you are on the right combination.



A third level appears only when the first two allow one

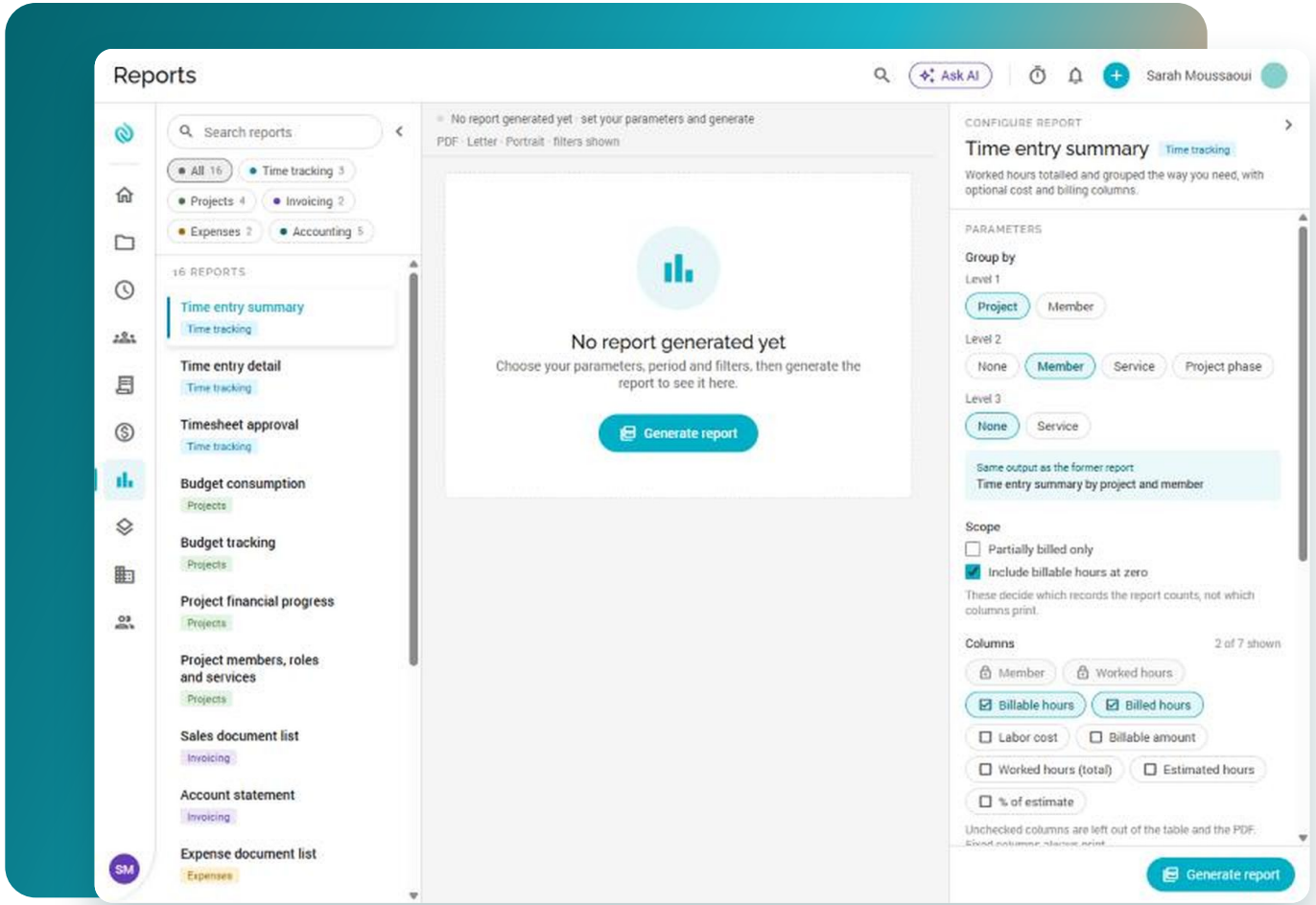
STEP 3 OF 5

_Choose the columns

2 of 7 shown counts the optional columns, so you can see how wide the report will be.

Padlocked columns are fixed and always print.

Unchecked columns leave both the table and the PDF.



Some columns, such as costs, appear only if your profile allows them

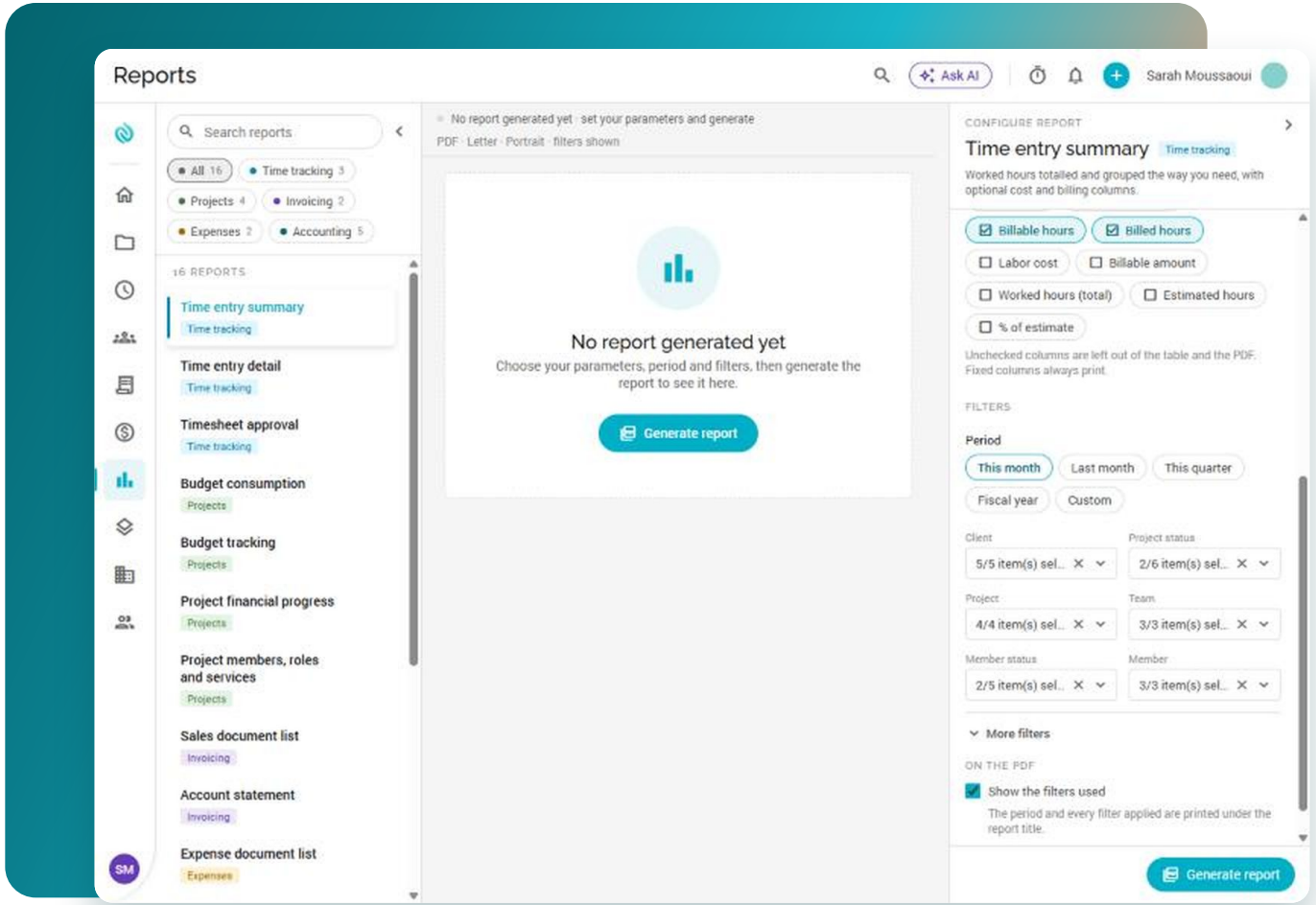
STEP 4 OF 5

_Filter the period

Period comes first because it matters most. **Custom** takes an exact range.

Each filter shows how many values are selected. **4/4** means nothing is being excluded.

> Leave **Show the filters used** ticked and the PDF prints them under the title.



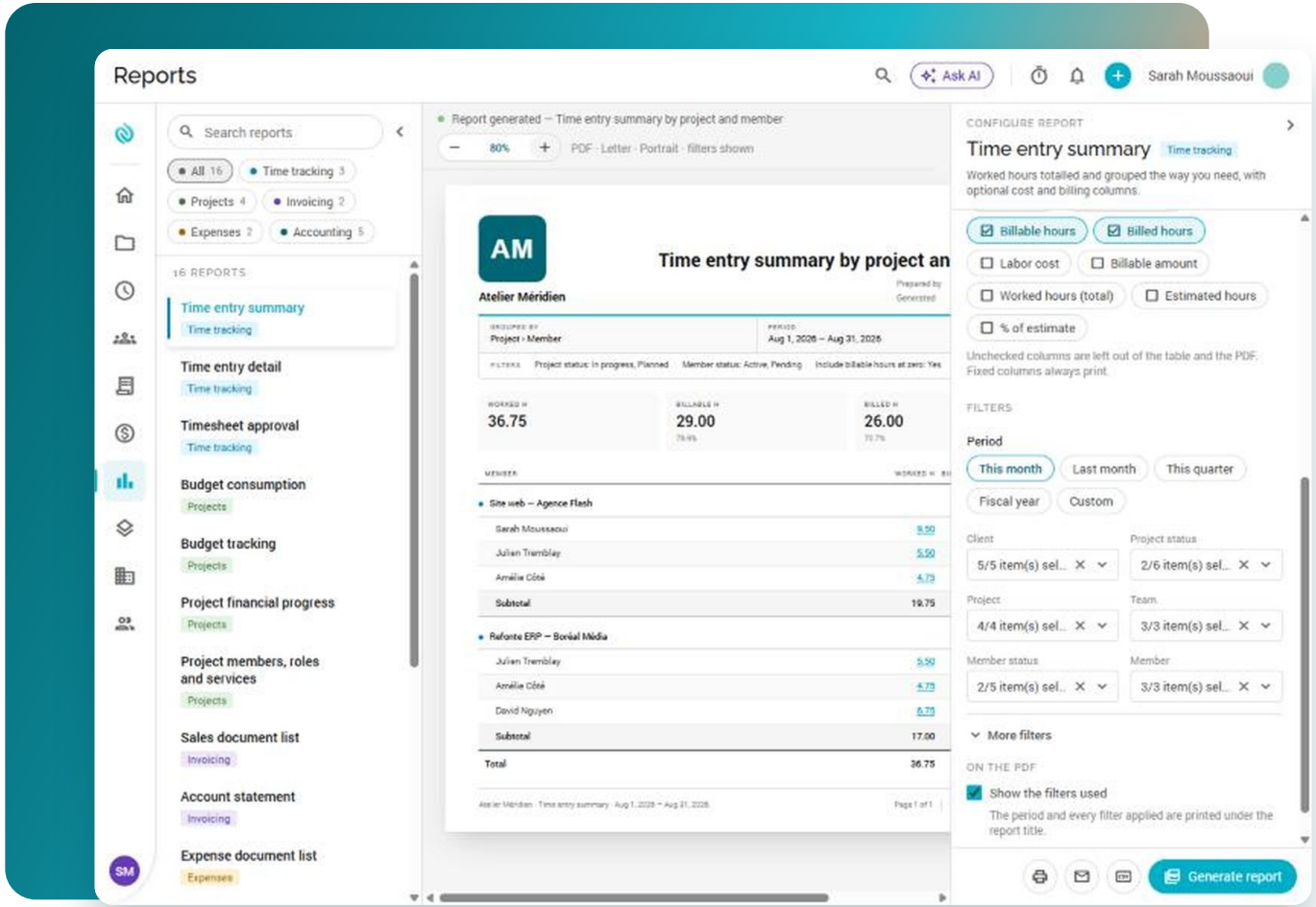
Less common filters are folded into More filters

STEP 5 OF 5

_Generate

The report appears laid out exactly as it will print. Paper size and orientation are chosen from the table's width.

> **Change any setting and the preview clears.** That is deliberate: it tells you the figures on screen are no longer current.



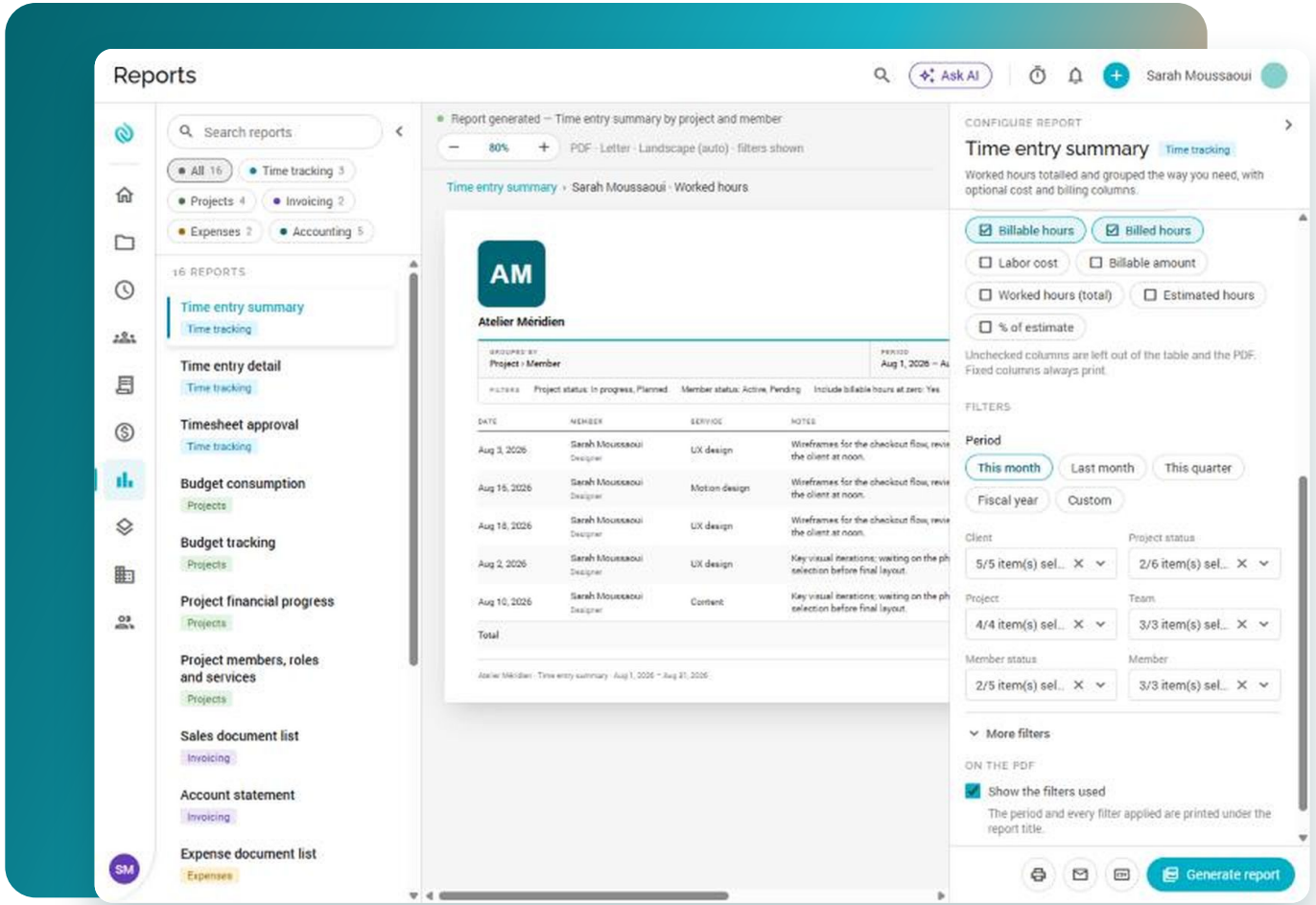
Zoom changes the preview only, never the exported document

GOING DEEPER

_Underlined figures are doors

Select one and the report rebuilds at the level below, keeping every filter you set.

The breadcrumb shows how far you have gone and takes you back one level at a time.



Detail tables are wider, so the page turns itself to landscape

THE CATALOGUE

_Sixteen reports, five categories

Time tracking

Time entry summary
Time entry detail
Timesheet approval

Projects

Budget consumption
Budget tracking
Project financial progress
Project members, roles and services

Invoicing

Sales document list
Account statement

Expenses

Expense document list
Expenses by category

Accounting

Aged balances
Payment history
Revenue by dimension
Tax summary
Financial overview

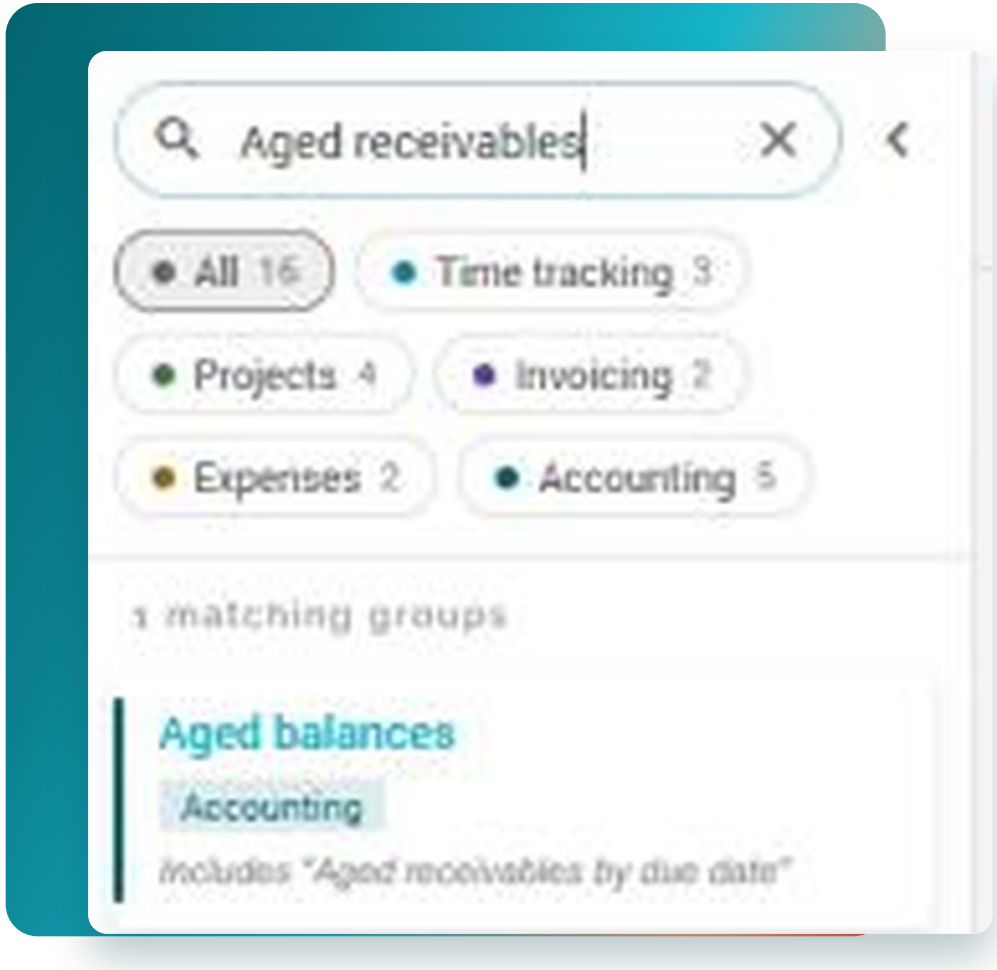
Every one of them works the way you have just seen. A report missing from your list is one your plan or your permission profile does not include.

FINDING YOUR OLD REPORT

Type the old name in the search box

You do not need to know which new report replaced yours. Search **“Aged receivables”** and the module finds it.

> The result names the old report underneath — **Includes “Aged receivables by due date”** — so you can see you have the right one before you open it.



Search matches both the new names and the former ones

TAKING IT AWAY

Four actions, at the foot of the panel

Export to CSV

The table as data, one row per line, ready for a spreadsheet.

Print

Exactly what the preview shows, at the level you are on.

Send by email

Attaches the PDF without leaving the screen.

Generate

Rebuilds with the current settings. Press it whenever the preview clears.

Export always writes the table, even when a chart is on screen — a chart has no rows