Oracle
**Primavera Submittal Exchange
Reports Help**

January 2024

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Oracle Primavera Submittal Exchange Reports Help

Contents

Submittal Exchange Reports

The Reports page allows you to run built-in reports, view, create, edit and run custom and saved reports.

In This Section

Working with the Reports Page

1) **Run Report** button: Select to run built-in, custom, or saved reports.
2) **Build Custom Report** button: Select to create custom reports.
3) Filter and search controls
   - **Filter By Type**: Choose to filter reports by type: Built-in Report, Custom Report, Saved report, or All.

- ▸ **Show column filters and Hide column filters** button: Select to hide or show the filter row. You can narrow the report list by filtering based on the report name, created by, creation date, last run date, projects, and   description fields.
    - ▸ **Search** box: Enter a text in the search box.
4) **Report List**: Displays all (built-in, custom, and saved) reports in the system.

5) **Gear**   ⚙   icon: Use the **Gear** icon to perform the following actions: **Run Report**, **Save As**, **Edit**, **Delete**, and **View Details**.

6) **Details** pane: View report details from the **Details** tab. Use the **Last runs** tab to download and view details of the last five reports that were generated. The **Distribution List** tab displays only if you have set the output option to **Send as attachment link**, it displays the details of users the report was emailed to, and the status of their subscription. From this tab you can also unsubscibe users from the distribution list.

Run Built-In Report

To run a built-in report:

1) From the **Reports** page, expand the built-In node if not already expanded.
2) Select a report and select the **Run Report** button. Or Select a report and choose **Run Report** from the **Gear**   ⚙   icon. You can also double-click to run the report.

Tips:
- ▸ To filter and search for a specific report, use the **Search** box or the in-column filters.
- ▸ To share this report, from the left pane under **Output**, select the option **Send as attachment link**.
- ▸ To view the report using Document Viewer, use the Output option **View Online**.

Viewing Report Details, Run History, Report Edit History and Distribution List

To view details of a report:

1) From the **Reports** page, select a report.

2) Select the **Gear**   ⚙   icon and choose **View Details**. Or Select a report and expand the bottom Pane (**View report details**).
3) Select the **Details** tab.
4) To view the run history, select the **Last 5 Runs** tab. Note, the run history is specific to the logged in user.

5) Select the **Distribution List** tab to view a list of users the report was emailed to, and the status of their subscription. From this tab you can also un-subscribe users from the distribution list. This tab displays only if you have set the output option to **Send as attachment link**.

6) Select the **Report Edit History tab** to view the changes made to this report. It displays the date the change was made, the user that made the change, and also lists the changes.

Tip:

You can download a report from the **Last 5 Runs** tab.

Build Custom Report

Use the **Build Custom Report** page to create a custom report by selecting projects,logs, and columns for your report. From this page, you can preview, schedule, save, or run the report.

Configuring your Custom Report

From the **Reports** page, select **Build Custom Report**. The **Build Custom Report** page displays.

1) Select **Add Projects**.
   a. From the **Add Projects** dialog box, select the projects you want to use.
   b. Select **Done**.
2) Expand the **Logs** node, and select **Add Logs**.
   a. From the **Add Logs** dialog box, select the logs you want to use.
   b. Select **Done**.
3) Expand the **Columns** node, and select **Add Columns**.
   a. From the **Add Columns** dialog box, select the columns you want to use.
   b. Select **Done**.
   c. Optional. Select and drag the **Reorder** icon to change the column order.
   d. Optional. Select a label you want to use for the column.
   e. Optional. Select the **Sort On** drop-down option to sort the columns in ascending or descending order.
4) Expand the **Filters** node. Select the filters you want to use.
5) Expand the **Additional Filters** node. Select the filters and choose **Add Filters** to create custom filters.
6) From the left pane, select a name, format, layout, output format, share access, and report description.
7) Select **Preview**, to view a sample of the report.
8) Select **Save** or **Save And Run**. The report is displayed on the **Reports** page under the **Custom** node.

Tips:

‣ Use the **Search** box on the **Add Projects**, **Add Columns**, and the **Add Logs** dialog boxes to find a specific project, log, or column.

‣ Select the **Remove** button to remove Projects, Logs, Columns or Filters.

‣ To run this report on a schedule, select the **Schedule** icon on the left pane and select the run frequency.

‣ To share this report, from the left pane under **Output**, select the option **Send as attachment link**.

‣ To grant users in your company access to run your custom report: from the left pane under **Access**, select **All Users of my Company**. A shared icon is displayed for reports that you have shared with the users in your company. Note, selecting this option allows users to view and edit your report. Only the report creator can delete the report and/or modify the access.

‣ The **Days Open** field in reports for Logs 1, 2, 3, 4 and 8 uses the **From Date** and **To Date** fields to calculate how long an item is open. You can modify the **From** and **To** dates for an accurate count of the Days Open field.

Scheduling a Report

Schedule a saved or custom report to automatically run at a scheduled frequency. You can configure the schedule when you create or edit a custom or saved report.

To schedule a report:

1) Select the **Schedule run** from the left pane.
2) Select a date in the **Schedule Report from** field to select a start date.
3) Select a recurring pattern.
4) Select **Ok**.

Tip:

‣ To remove a schedule, choose **None** for the recurring pattern.

‣ Use the **Reset** button to reset your changes or the **Cancel** button to clear your selection.

Distributing a Report via Email

You can choose to email the report output to project team members or company users. Each time the report is run, an email attachment is sent to the users in your distribution list. Users have the option to unsubscribe from the distribution list. You can set the distribution list when creating or modifying a custom report.

To distribute a report via email:

1) Select **Build Custom Report** if you are creating a new report, or select the report you want to modify and select the **Gear**   icon **> Edit**.
2) From the left pane, select the output **Send as attachment link**.
3) Select the **Distribution List**   link The Distribution List page is displayed.
4) From the right pane, select from **Company Users** or **Project Team** users.
5) Select users and select either the **Add to "To List"** or **Add to "CC List"** button.
6) Select **Save**.

Tip:

▸ You can view the distribution list and the subscription status from the **Distribution List** tab by selecting the **Gear**   icon **> View Details**.
▸ You can also usubscribe users from **Distribution List** tab.

Edit Custom Report

Use the **Edit Custom Report** page to modify a custom report. You can change the name, projects, logs, columns, filters, layout, and output of your custom report. You can also set or modify the scheduled run frequency.

Modifying a Custom Report

1) From the **Reports** page, expand the **Custom** node.

2) Select the report you want to modify. Select the **Gear**   icon **> Edit**. You can also double-click on a report to put it in edit mode.
3) Make changes to the report. You can add or remove projects, logs, columns, and filters.
4) From the left pane, you can update the report name, format, layout, output, description and schedule frequency.
5) Select **Preview** to view a sample of the report.
6) Select **Save** or **Save And Run**. The report is displayed on the **Reports** page under the **Custom** node.

Tips:

▸ Select the **Remove** button   to remove Projects, Logs, Columns or Filters.
▸ Select and drag the **Reorder** icon to change the column order.
▸ Select the **Sort On** drop-down option to sort the columns in ascending or descending order.
▸ To run this report on a schedule, select the **Schedule** icon on the left pane and select the run frequency.

- ‣ To grant users in your company access to run your custom report: from the left pane under **Access**, select **All Users of my Company**. A   shared icon is displayed for reports that you have shared with the users in your company. Note, selecting this option allows users to view and edit your report. Only the report creator can delete the report and/or modify the access.
- ‣ The **Days Open** field in reports for Logs 1, 2, 3, 4 and 8 uses the **From Date** and **To Date** fields to calculate how long an item is open. You can modify the **From** and **To** dates for an accurate count of the Days Open field.

Deleting a Custom Report

To delete a custom report:

1) From the **Reports** page, expand the **Custom**   node if not already expanded.

2) Select a report and select the **Gear**   icon and choose **Delete**.

Create Saved Report

The **Create Saved Report** page allows you to save changes made to a built-in report. If you need to run a built-in report with specific filters, logs, columns, or output format, you can use the **Create Saved Report** page to retain your customizations.

Configuring your Saved Report

1) From the **Reports** page, expand the built-In node if not already expanded.

2) Select a report and from the **Gear**   icon, select **Save As**. OR From the **Run Built in Report** page, select **Save As Defined Report**.
3) Select **Add Projects**.
   a. From the **Add Projects** dialog box, select the projects you want to use.
   b. Select **Done**.
4) Expand the **Logs** node, and select **Add Logs**.
   a. From the **Add Logs** dialog box, select the logs you want to use.
   b. Select **Done**.
5) Expand the **Columns** node, and select **Add Columns**.
   a. From the **Add Columns** dialog box, select the columns you want to use.
   b. Select **Done**.
   c. Optional. Select and drag the **Reorder** icon to change the column order.

    d. Optional. Select a label you want to use for the column.

6) Expand the **Filters** node. Select the filters you want to use.

7) From the left pane, select a name, format, layout, output format, and report description.

8) Select **Preview**, to view a sample of the report.

9) Select **Save** or **Save And Run**. The report is displayed on the **Reports** page under the **Saved** node.

Tips:

▸ User the **Search** box on the **Add Projects**, **Add Columns**, and the **Add Logs** dialog boxes to find a specific project, log, or column.

▸ Select the **Remove** button to remove Projects, Logs, or Columns.

▸ To run this report on a schedule, select the **Schedule** icon on the left pane and select the run frequency.

▸ To share this report, from the left pane under **Output**, select the option **Send as attachment link**.

▸ To grant users in your company access to run your saved report: from the left pane under **Access**, select **All Users of my Company**. A shared icon is displayed for reports that you have shared with the users in your company. Note, selecting this option allows users to view and edit your report. Only the report creator can delete the report and/or modify the access.

▸ The **Days Open** field in reports for Logs 1, 2, 3, 4 and 8 uses the **From Date** and **To Date** fields to calculate how long an item is open. You can modify the **From** and **To** dates for an accurate count of the Days Open field.

Scheduling a Report

Schedule a saved or custom report to automatically run at a scheduled frequency. You can configure the schedule when you create or edit a custom or saved report.

To schedule a report:

1) Select the **Schedule run** from the left pane.

2) Select a date in the **Schedule Report from** field to select a start date.

3) Select a recurring pattern.

4) Select **Ok**.

Tip:

▸ To remove a schedule, choose **None** for the recurring pattern.

▸ Use the **Reset** button to reset your changes or the **Cancel** button to clear your selection.

Edit Saved Report

Use the **Edit Saved Report** page to modify a saved report. You can change the name, projects, logs, columns, filters, layout, and output of your saved report. You can also set or modify the scheduled run frequency.

Modifying a Saved Report

1) From the **Reports** page, expand the **Saved** node.
2) Select the report you want to modify.
3) Select the **Gear**   ⚙   icon > **Edit**.
4) Make changes to the report. You can add or remove projects, logs, columns, and filters. You can also update the report name, format, layout ,output, description and schedule frequency.
5) Select **Preview**, to view a sample of the report.
6) Select **Save** or **Save And Run**. The report is displayed on the **Reports** page under the **Saved** node.

Tips:

▸ Select the **Remove** button   to remove Projects, Logs, Columns or Filters.
▸ Select and drag the **Reorder** icon to change the column order.
▸ To run this report on a schedule, select the **Schedule** icon on the left pane and select the run frequency.
▸ To share this report, from the left pane under **Output**, select the option **Send as attachment link**.
▸ To grant users in your company access to run your saved report: from the left pane under **Access**, select **All Users of my Company**. A shared icon is displayed for reports that you have shared with the users in your company. Note, selecting this option allows users to view and edit your report. Only the report creator can delete the report and/or modify the access.
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Delete a Saved Report

To delete a saved report:

1) From the **Reports** page, expand the **Saved** node if not already expanded.

2) Select a report and select the **Gear** icon and choose **Delete**.