Basic Report Options

This ribbon allows you to completely customize your report. You can show exactly what you want to see and only what you want to see.
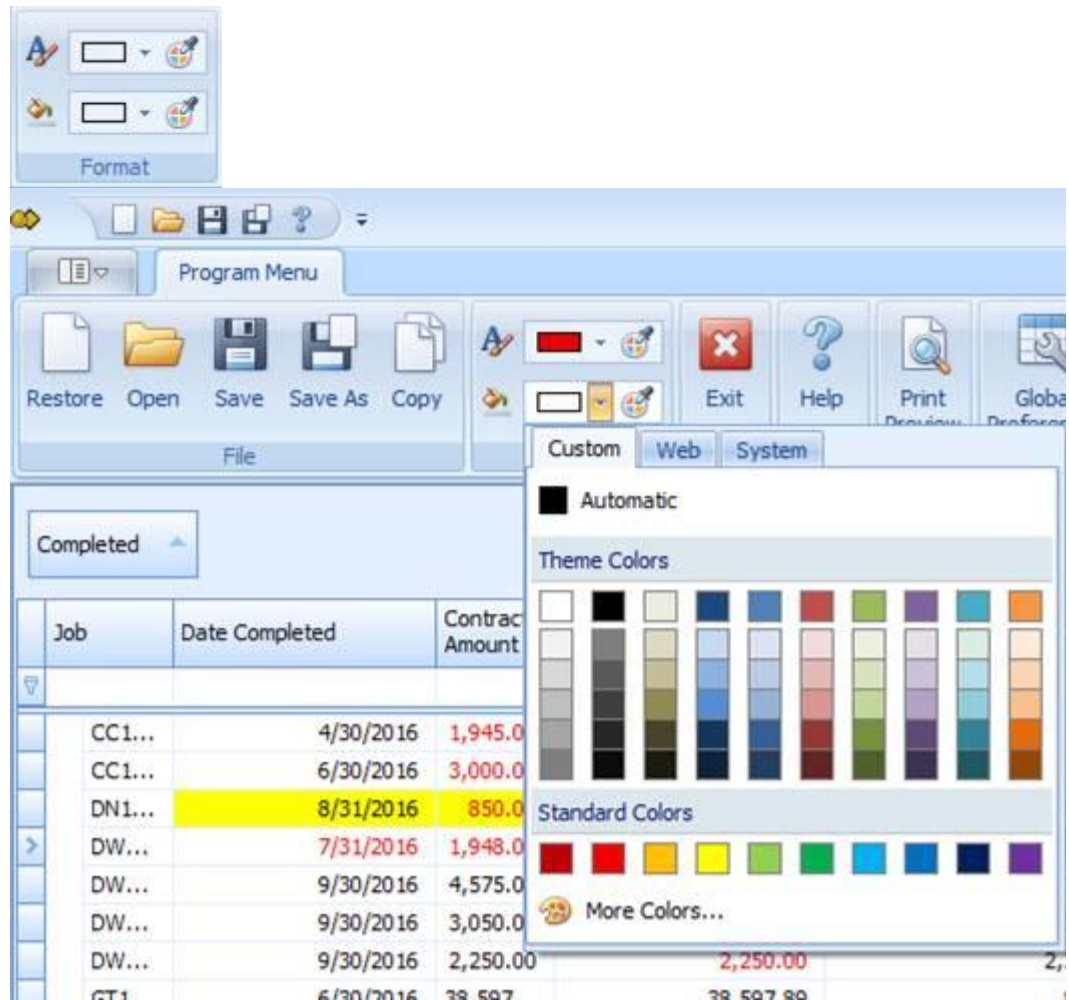

File: Here, you can:

• Restore to the original template

• Open a saved template

• Save a template

• Save as a different template

• Copy the template

Format: This section allows you to recolor text or cells. By clicking the down arrow, you see a variety of color options. These format options do not save even if you save the template, but they will print.
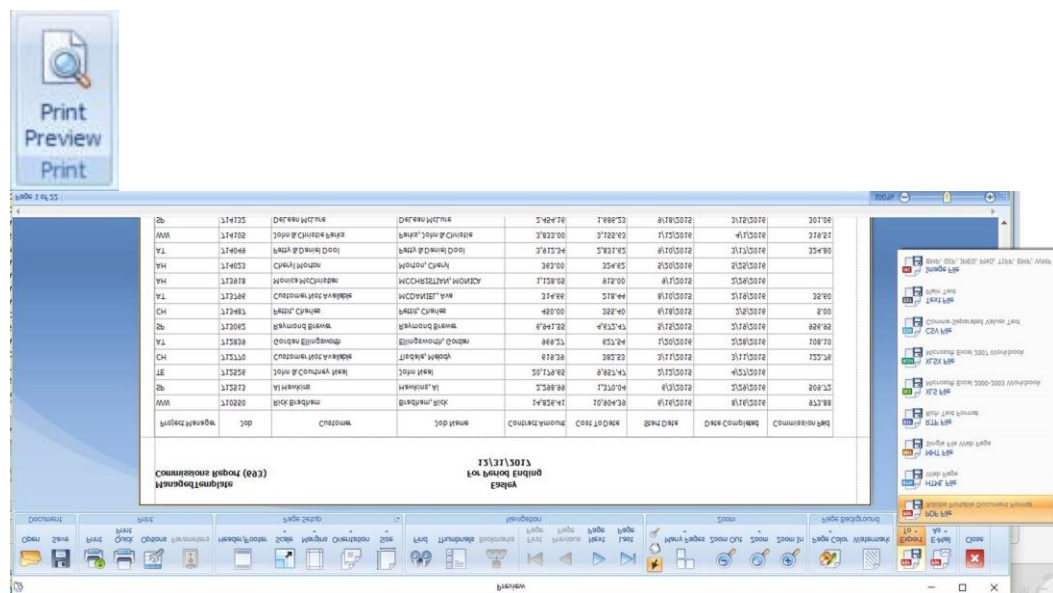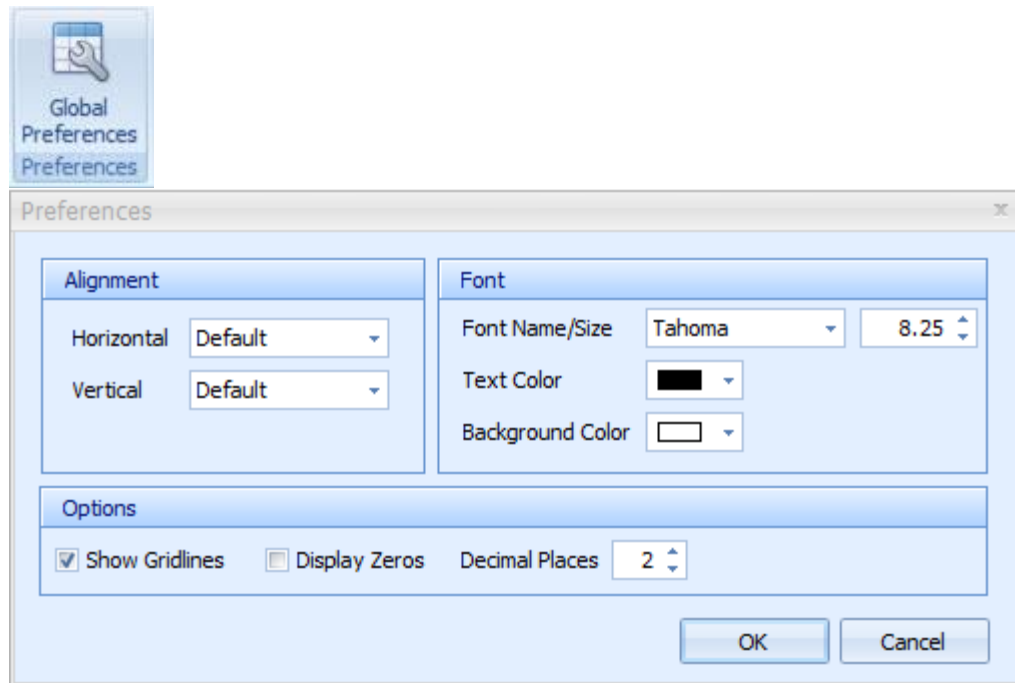
Exit: Closes the report
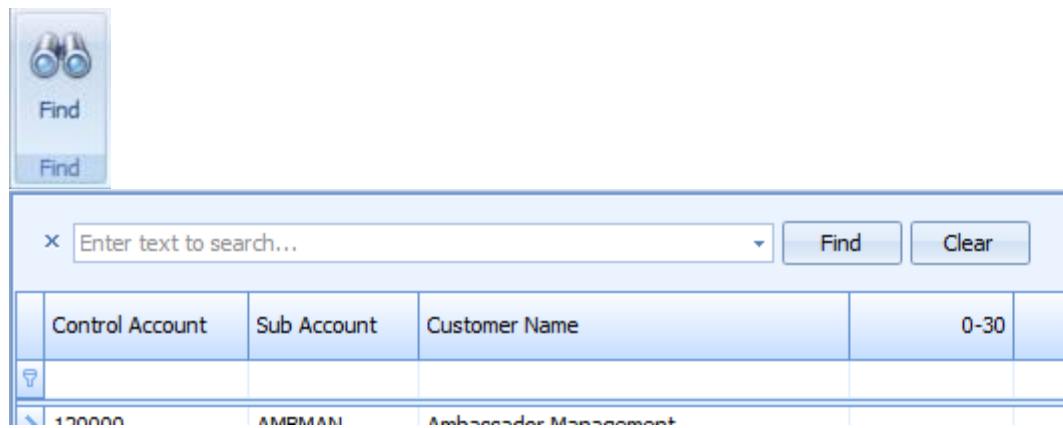

Help: Opens Help Files

Print: This option presents a variety of document printing/saving options. When you click Print Preview, a separate window opens where you can edit Page Setup preferences such as Headers/Footers, Scales, Margins, Orientation, or Size. There are even several Navigation options including Find, Thumbnails, First Page, Previous Page, Next Page, and Last Page. You can zoom or view many pages at once. The ability to edit the Page Background's Color and Watermark allows you to make all of your changes inside of Hardhat without having to use outside programs to customize your report. Once you have finished editing the document, you are able to Export or Email your report from this window. There are several file formats to choose from. Select whichever you prefer and you are done. When you click Close or the X at the top right of the window, you will be taken back to the previous report window.

Preferences: In this section, you can change text preferences such as Alignment, Font Name, Font Size, Text Color, Background Color, Showing Gridlines, Displaying Zeroes, and the number of Decimal Places
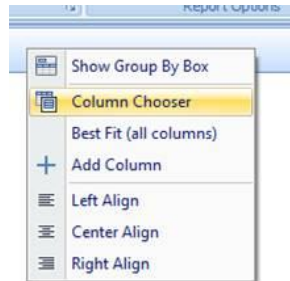
Find: This will appear directly below the ribbon and allows you to search for specific text within the report.
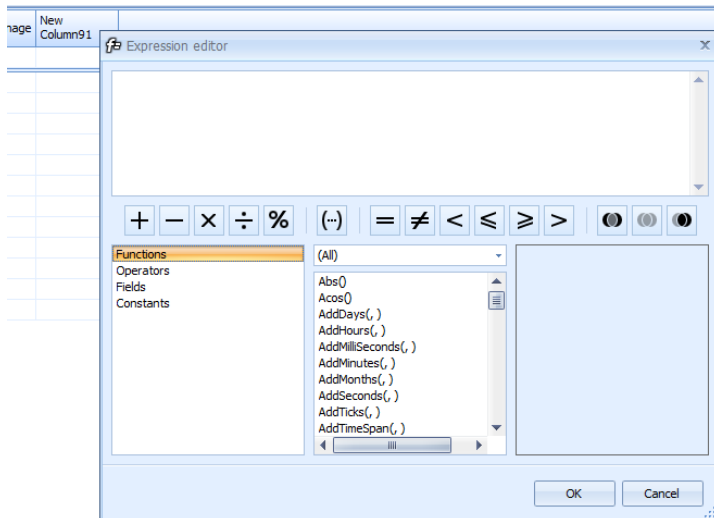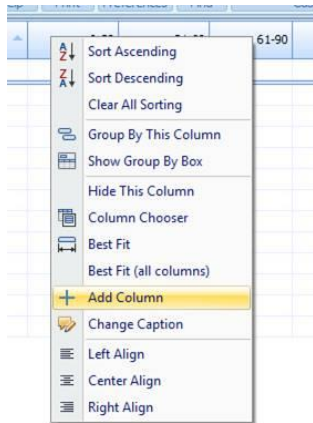
Column Search: Directly below each column header, you will see blank cells. These boxes allow you to type and search that column only.
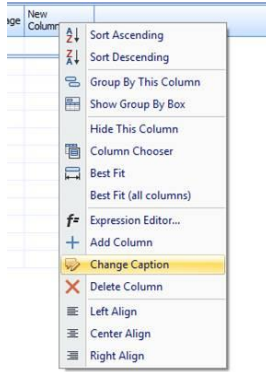
Job	Project Description	Date Completed	Contract Amount	Billed-To-Date 9/2017	Received 10/2016 - 9/2017	Cost 10/2016 - 9/2017	Cost-To-Date 9/2017	Retainage	Balance From Aging	Billed 10/2016 - 9/2017	Received-To-Date 9/2017
AB1501	Bobby Lanier Farm Park - Phase 2	12/31/2015	48,395.00	48,395.02			41,944.49		0.02		48,395.00

Column Chooser: If a column that you want to see does not appear on the report, right click anywhere on the column header and select Column Chooser. A small Customization window will appear that gives several columns to choose from. Drag and drop the column on the column header where you want it to appear. Also, columns can be rearranged by dragging and dropping anywhere on the column header. If you do not want to see a column that is on the report, simply grab the label in the column header and drag it to the ribbon. When you see the X appear, you can drop the column and it will be removed from the report. You can always find it again on the Column Chooser.

Report Options

- Show Group By Box
- Column Chooser
- Best Fit (all columns)
- + Add Column
- Left Align
- Center Align
- Right Align

Customization   ✕

Balance From Aging

Estimate Type

Estimator

Last Date Paid

Market Area

Received To Date

Retainage

Add Column: If you want to create a column that you involves numerical data from multiple columns, right click on the column header and choose Add Column. This allows you to create a column that is tailored to your needs. Select the data fields and operators that you want to be involved in your column then click OK. Your new column will be the furthest on the right. You can rename the column by right clicking and selecting Change Caption. This column will now appear in your Column Chooser.

Group by This Column: This option will group your report by the data in the column that you have selected. The example above groups by Project Manager and includes a total for each Project Manager.

Job	Customer	Job Name	Contract Amount	Cost To Date	Start Date	Date Completed	Commission Paid	Completed	Billed-To-Date	Received To Date	Last Date Paid
Project Manager: AC											
716035	Rudy Watkins	Watkins, Rudy	850.00	568.70	4/13/2016	4/19/2016	127.50	Yes	850.00	850.00	4/26/2016
716422	Rev Dave Phillips	Phillips, Rev Dave	3,450.00	2,449.21	7/27/2016	10/24/2016	355.96	Yes	3,450.00	3,450.00	10/17/2016
716855	John Whitaker	Whitaker, John	2,390.00	1,579.80	10/10/2016	10/25/2016	380.50	Yes	2,390.00	2,390.00	10/17/2016
717088	Candice Davidson	Davidson, Candice	2,350.00	1,683.31	9/12/2016	10/31/2016	225.29	Yes	2,350.00	2,350.00	11/1/2016
			9,040.00	6,281.02			1,089.25		9,040.00	9,040.00	
Project Manager: AH											
713918	Monica McChristian	MCCHRISTIAN, MONICA	1,128.05	915.00	9/1/2015	2/29/2016		Yes	1,128.05	1,128.05	3/1/2016
714023	Cheryl Morton	Morton, Cheryl	363.00	324.62	5/20/2016	5/25/2016		Yes	363.00	363.00	5/25/2016
714750	Renee Cockrell Pearson	PEARSON, RENEE	200.00	147.40	12/17/2015	6/14/2016		Yes	200.00	200.00	6/14/2016
715188	Customer Not Available	Chapman, Thomas	125.00	92.14	2/1/2016	2/5/2016	22.54	Yes	125.00	125.00	2/17/2016
715764	Dan Blickhan	Blickhan, Dan	425.00	333.03	4/7/2016	8/31/2016	53.75	Yes	425.00	425.00	4/7/2016
715894	Patty Robinson	Robinson, Patty	1,350.00	1,102.71	4/12/2016	4/12/2016	123.00	Yes	1,350.00	1,350.00	4/13/2016
715988	Mary Brown	Brown, Mary	36,883.68	26,062.17	6/23/2016	11/21/2016		Yes	36,883.68	36,883.68	11/11/2016
715991	Jackie Whitlock	Whitlock, Jackie	11,788.30	6,695.51	6/30/2016	10/25/2016		Yes	11,788.30	11,788.19	10/10/2016
716114	Patricia Ward	WARD, PATRICIA	400.00	253.26	5/4/2016	6/28/2016	72.50	Yes	400.00	400.00	4/28/2016
716149	Gail Dobbins	Dobbins, Gail	125.00	61.68	5/3/2016	5/16/2016	56.25	Yes	125.00	125.00	5/3/2016
716280	Mary Jane Taintor	Taintor, Mary Jane	1,572.59	926.58	5/27/2016	8/31/2016	360.16	Yes	1,572.59	1,572.59	5/31/2016
716295	Bruce Taylor	Taylor, Bruce	100.00	49.35	5/23/2016	5/23/2016	45.00	Yes	100.00	100.00	5/20/2016
716298	Patricia Wyatt	Wyatt, Patricia	100.00	49.35	5/23/2016	5/23/2016	45.00	Yes	100.00	100.00	5/20/2016
716465	Matthew Philpose	Philpose, Matthew	5,655.46	3,886.20	6/24/2016	9/20/2016	813.28	Yes	5,655.46	5,655.46	9/8/2016
716515	Gordon Ballinger	BALLINGER, GORDON	280.00	66.47	7/18/2016	10/3/2016		Yes	280.00	280.00	10/17/2016
716595	Steven Laguardia	LAGUARDIA, STEVEN	598.44	427.45	8/5/2016	9/12/2016	94.90	Yes	598.44	598.44	8/16/2016
716636	Barbara Buggs	Buggs, Barbara	125.00	60.73	7/25/2016	7/25/2016	56.25	Yes	125.00	125.00	7/25/2016
716687	Mike McConell	McConell, Mike	585.00	439.45	7/8/2016	11/28/2016		Yes	585.00	585.00	11/8/2016
716800	Deloise Price	Price, Deloise	200.00	153.06	8/10/2016	8/12/2016	19.98	Yes	200.00	200.00	8/10/2016
717055	Jason Callahan	CALLAHAN, JASON	2,714.25	1,784.23	8/26/2016	10/19/2016	420.66	Yes	2,714.25	2,714.25	10/19/2016
717138	Dan & Patty Michaelis	Michaelis, Dan & Patty	7,766.30	6,058.80	9/27/2016	9/28/2016	521.56	Yes	7,766.30	7,766.30	9/27/2016
			72,484.96	49,889.19			2,704.83		72,484.96	72,484.96	
Project Manager: AT											
712839	Gordan Ellingsworth	Ellingsworth, Gordan	969.27	627.54	1/20/2016	2/28/2016	108.10	Yes	969.27	969.27	2/23/2016
713796	Customer Not Available	MCDANIEL, Ava	314.66	218.44	8/10/2015	2/19/2016	35.60	Yes	314.66	314.66	2/16/2016
714049	Patty & Daniel Dool	Patty & Daniel Dool	3,912.34	2,831.62	9/10/2015	3/17/2016	324.80	Yes	3,912.34	3,912.34	3/17/2016
714152	Ed Price	Ed Price	17,670.48	14,453.66	10/7/2015	1/26/2016	1,575.50	Yes	17,670.48	17,670.48	1/27/2016
714404	Mary Hectorne	Hectorne, Mary	6,345.69	4,696.44	1/12/2016	2/19/2016	412.50	Yes	6,345.69	6,345.69	2/18/2016
			1,144,095.94	821,448.26							

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