



# Fieldglass Supplier Creating Reports



TABLE OF CONTENTS	
OVERVIEW	2
STEP 1 – CREATE THE REPORT	2
STEP 2 - NAME AND INDICATE WHERE REPORT WILL BE SAVED	4
STEP 3 – REMOVE FIELDS THAT ARE NOT REQUIRED	5
STEP 4 – ADD EXTRA FIELDS AND FILTERS	5
STEP 5 – RUN THE REPORT	

#### **OVERVIEW**

The purpose of this guide is to show suppliers how to create a report that details important information about Fieldglass invoices, including the following:

- The Fieldglass invoice number.
- Which timesheet the invoice relates to.
- Which worker is involved.
- The relevant period.
- Any applicable Statement of Work (SOW) characteristics.

An example of an invoice-related report is displayed below:

Invoice					Time	Time Sheet Invoice Line Item	Invoice Line	Line Item	Invoice	Invoice	Invoice		Billable
Line Item Invoice ID	Invoice Code	Invoice Status	Worker	Time Sheet ID	Sheet	End Date ID	Item Type	Entry Name	Line Item	Tax/Adj	Amount	Business Unit	Hours
01/01/2024 NDBKPI00000105	RR607	Approved				NDBKPE00000030	Event		10,000.00	0.00	10,000.00	Group Procurement	t 0.00
01/31/2024 NDBKPI00000104	TEST01	Payment Pending				NDBKPS00000355	Schedule		50,000.00	7,500.00	57,500.00	Group Procurement	nt 0.00
02/01/2024 NDBKPI00000132	4500013924RR	Approved				NDBKPE00000048	Event		20,000.00	0.00	20,000.00	Group Procurement	nt 0.00
02/04/2024 NDBKIN00037516	NDBKIN00037516	Payment Pending	Hundred, Two	NDBKTS00049122	01/29/2024	02/04/2024 NDBKTS00049122	Time Sheet	Time Worked	12,800.00	1,920.00	14,720.00	Group Procurement	it 16.00
02/11/2024 NDBKIN00037517	NDBKIN00037517	Payment Pending	Hundred, Two	NDBKTS00049123	02/05/2024	02/11/2024 NDBKTS00049123	Time Sheet	Time Worked	31,200.00	4,680.00	35,880.00	Group Procurement	it 39.00
02/11/2024 NDBKIN00037523	NDBKIN00037523	Payment Pending	SerialNo, SAP	NDBKTS00049148	02/05/2024	02/11/2024 NDBKTS00049148	Time Sheet	Time Worked	18,000.00	2,700.00	20,700.00	Group Procurement	t 40.00
02/18/2024 NDBKIN00037524		Payment Pending	SerialNo, SAP	NDBKTS00049149	02/12/2024	02/18/2024 NDBKTS00049149	Time Sheet	Time Worked	18,000.00	2,700.00	20,700.00	Group Procurement	t 40.00
02/23/2024 NDBKPI00000107	1234543	Payment Pending				NDBKPE00000020	Event		2,200.00	330.00	2,530.00	Group Procurement	t 0.00
02/25/2024 NDBKIN00037525	NDBKIN00037525	Payment Pending	SerialNo, SAP	NDBKTS00049150	02/19/2024	02/25/2024 NDBKTS00049150	Time Sheet	Time Worked	18,000.00	2,700.00	20,700.00	Group Procurement	t 40.00
02/29/2024 NDBKIN00037515	NDBKIN00037515	Payment Pending	Automation, Test	NDBKTS00049120	02/01/2024	02/29/2024 NDBKTS00049120	Time Sheet	Time Worked	4,200.00	630.00	4,830.00	Group Procurement	t 14.00
02/29/2024 NDBKIN00037518	NDBKIN00037518	Payment Pending	Change, Final	NDBKTS00049134	02/01/2024	02/29/2024 NDBKTS00049134	Time Sheet	Time Worked	7,000.00	1,050.00	8,050.00	Group Procurement	nt 14.00
03/01/2024 NDBKPI00000106	JOHN3	Payment Pending				NDBKPE00000033	Event		1,000.00	150.00	1,150.00	Group Procurement	
03/01/2024 NDBKPI00000116	RR4500013850INV	Payment Pending				NDBKPS0000628	Schedule		600.00	90.00	690.00	Group Procurement	t 0.00
03/03/2024 NDBKIN00037526	NDBKIN00037526	Payment Pending	SerialNo, SAP	NDBKTS00049151	02/26/2024	03/03/2024 NDBKTS00049151	Time Sheet	Time Worked	18,000.00	2,700.00	20,700.00	Group Procurement	t 40.00
03/10/2024 NDBKIN00037527	NDBKIN00037527	Paid	SerialNo, SAP	NDBKTS00049152	03/04/2024	03/10/2024 NDBKTS00049152	Time Sheet	Time Worked	18,000.00	2,700.00	20,700.00	Group Procurement	t 40.00
03/16/2024 NDBKPI00000114	RR4500013848	Payment Pending				NDBKPS0000625	Schedule		600.00	90.00	690.00	Group Procurement	t 0.00
03/16/2024 NDBKPI00000115	RR4500013850	Payment Pending				NDBKPS0000627	Schedule		400.00	0.00	400.00	Group Procurement	t 0.00
03/19/2024 NDBKPI00000112	Rishi Invoice Test 1	Payment Pending				NDBKPS0000620	Schedule		50.00	0.00	50.00	Group Procurement	t 0.00
03/19/2024 NDBKPI00000113	Rishi Invoice Test 2	Payment Pending				NDBKPS00000509	Schedule		40.00	0.00	40.00	Group Procurement	nt 0.00
03/20/2024 NDBKMI00000915	Misc_20240320_1	Payment Pending	Hundred, Two			NDBKMI00000915	Miscellaneous	Miscellaneous	I 100.00	15.00	115.00	Group Procurement	t 0.00
03/20/2024 NDBKMI00000917	Misc_Credit_202403	Payment Pending	Hundred, Two			NDBKMI00000917	Miscellaneous	Miscellaneous	I -100.00	-15.00	-115.00	Group Procurement	
03/29/2024 NDBKPI00000130	15 VAT Test	Payment Pending				NDBKPE00000032	Event		5,000.00	750.00	5,750.00	Group Procurement	t 0.00
03/31/2024 NDBKIN00037519	NDBKIN00037519	Payment Pending	Final, Final	NDBKTS00049137	03/01/2024	03/31/2024 NDBKTS00049137	Time Sheet	Time Worked	800.00	120.00	920.00	Group Procurement	t 16.00
03/31/2024 NDBKIN00037520	NDBKIN00037520	Payment Pending	Final, Final	NDBKTS00049138	03/01/2024	03/31/2024 NDBKTS00049138	Time Sheet	Time Worked	-800.00	-120.00	-920.00	Group Procurement	t -16.00
03/31/2024 NDBKIN00037521	NDBKIN00037521	Payment Pending	Final, Final	NDBKTS00049139	03/01/2024	03/31/2024 NDBKTS00049139	Time Sheet	Time Worked	2,150.00	322.50	2,472.50	Group Procurement	
03/31/2024 NDBKIN00037522	NDBKIN00037522	Payment Pending	Automation, Test	NDBKTS00049121	03/01/2024	03/31/2024 NDBKTS00049121	Time Sheet	Time Worked	8,050.00	1,207.50	9,257.50	Group Procurement	t 23.00
03/31/2024 NDBKPI00000133	RR4500013925	Payment Pending				NDBKPE00000050	Event		50,000.00	7,500.00	57,500.00	Group Procurement	nt 0.00
03/31/2024 NDBKPI00000135	RR4500013926	Payment Pending				NDBKPE00000052	Event		100,000.00	15,000.00		Group Procurement	
04/02/2024 NDBKPI00000134	RRRRR450001392	Payment Pending				NDBKPE00000051	Event		100 000 00	15 000 00	115 000 00	Group Procurement	t 0.00

#### **STEP 1 – CREATE THE REPORT**

1 Select Analytics > Create Report from the Menu bar.

SAP Fieldglass Beta Mode		Search by ID or text
Home View Create Ar	alytics	
Welcome Joe Blog	My Reports View/run a collection of your 12 most recently executed reports	Create Report Use for detailed information that can be grouped and filtered
	All Reports View a list of all reports you have permission to run and/or edit.	Create Consolidated Report Use to combine Reports and Pivot Tables into a single report workbook
🐕 Job Posting	Report Outputs Edit/download the most recently scheduled report	Data Dictionary
Statement of Work		Report Fields View the complete list of reporting fields
Se Event		Formulas View/create fields containing a calculation that can be used in reports
Worker (1)	to click here to oper	the Wizard

2 A prompt with various options that can be used for the report will be displayed. Select the **Invoice** option:



3 After having selecting **Invoice**, a screen where the user can **scroll down** to view standard fields and filters, as well as a details section, will be displayed. In the **Details** section, the report can be given a name and the user can select a folder where the report will be saved.

## It's recommended that the Details section be completed before making any changes to the fields or adding any filters.

Add Formula			Module	Data Field Name		Display Name	Sort Order	×
				Drop fields here to	group I	by in the report		
All *	Colur							
elds 🛛 🛛 🖽 🗂 🗰 🗰	Cotu	11115						
Search For Fields Q	^		Module	Data Field Name		Display Name	Sort Order	×
	÷	×	Job Posting	Job Posting Title		Job Posting Title		×
> Hiring Status	÷	×	Invoice	Invoice Line Item Amount	Σ	Invoice Line Item Amount		×
> Hours Worked	÷	×	Invoice	Invoice Line Item Date		Invoice Line Item Date	~	×
> Latest Work Order	÷	×	Invoice	A Invoice Line Item End Date		Invoice Line Item End Date	~	×
> Legal Entity	÷	×	Invoice	Invoice Tax/Adj Amount	Σ	Invoice Tax/Adj Amount	~	×
> Profile Worker	÷	×	Invoice	Invoice Amount	Σ	Invoice Amount		×
> Qualification	÷	×	Invoice	Business Unit		Business Unit		×
Y Qualifications     Rate Change Matrix	÷	*		Billable Hours	Σ	Billable Hours		
Kate Change Matrix     Rate Schedule			Invoice		2			×
> Rates	÷	×	Consolidated Invoice	Consolidated Invoice ID		Consolidated Invoice ID		×
× • • • • • • • • • • • • • • • • • • •	÷	×	Invoice	Cost Center		Cost Center		×
				Drop fields here	to add	to the report		
Invoice Change	Sele	ected	Filters	Drop rietus riete	to add			
Invoice Change			Filters 1 AND 2 AND 3 AN		10 800			
Add Formula		r Logic	1 AND 2 AND 3 AN	D 4 AND 5 Edit				×
Invoice Change Add Formula All * * ields • All # T # @	Filter	r Logic	1 AND 2 AND 3 AN	D 4 AND 5 Edit				×××
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Invoice Change Add Formula Add Formula Add Som All 🛱 T # 00 Search For Fields Q > Hiring Status > Hours Worked	Filter	r Logic	1 AND 2 AND 3 AN 1 Invoice Line Item Date Betw 4 Invoice Line Item End Date 1 Invoice Status Equals	D         4         AND         5         Edit           reen         V         04/17/7           Between         V         04           V         Any X         04	2024			×
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Invoice Change Add Formula Add Formula All X ields All T # 00 Search For Fields Q > Hiring Status > Hours Worked > Legal Entity > Profile Worker > Legal Entity > Profile Worker > Qualification > Qualification > Rate Change Matrix > Rate Schedule	Filter	r Logic L é 2 é 3 é 4 é	1     AND     2     AND     3     AN       3     Invoice Line Item Date     Betw       4     Invoice Line Item End     Date       5     A     Invoice Status     Equals       6     Invoice Approved Date     Betw       7     Invoice Submit Date     Betweet	D       4       AND       5       Edit         reen        04/12/2         Between        04/2          Any ×       04/12/2         ween        04/12/2         Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM	2024 2024 2024 24 É	<ul> <li>➡ to </li> <li>➡ to </li> <li>➡ 12:00 AM </li> <li>➡ 12:00 AM </li> </ul>		× × ×
Invoice Change Add Formula Add Formula Add Something Status > Hours Worked > Legal Entity > Profile Worker > Legal Entity > Profile Worker > Qualification > Qualification > Rate Schedule > Rates	Filter	r Logic L & & 2 & & 3 & & 4 & & 5 & & 6	1       AND       2       AND       3       AN         1       Invoice Line Item Date       Betweet       Betweet         3       1       Invoice Line Item End       Date       Betweet         4       Invoice Status       Equals       Invoice Approved Date       Betweet         5       Invoice Submit Date       Betweet       Invoice         6       Invoice Submit Date       Betweet       Invoice         6       Mark Submit Date       Betweet       Invoice         6       All Account       Invoice       Invoice         10       Invoice Submit Date       Betweet       Invoice         10       Invoice Submit Date       Invoice       Invoice         10       Invoice Submit Date       Invoice       Invoice         10       Invoice Submit Date       Invoice       Invoice <td>D       4       AND       5       Edit         reen        04/12/2         Between        04/2          Any ×       04/12/2         ween        04/12/2         Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM</td> <td>2024 2024 2024 24 É</td> <td><ul> <li>➡ to </li> <li>➡ to </li> <li>➡ 12:00 AM </li> <li>➡ 12:00 AM </li> </ul></td> <td></td> <td>× × ×</td>	D       4       AND       5       Edit         reen        04/12/2         Between        04/2          Any ×       04/12/2         ween        04/12/2         Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM	2024 2024 2024 24 É	<ul> <li>➡ to </li> <li>➡ to </li> <li>➡ 12:00 AM </li> <li>➡ 12:00 AM </li> </ul>		× × ×
Invoice Change Add Formula Add Formula Add Somethy Content of the second sec	Filter	r Logic L & & 2 & & 3 & & 4 & & 5 & & 6	1     AND     2     AND     3     AN       a)     Invoice Line Item Date     Between to       b) <b>A</b> Invoice Line Item End     Equals       b)     Invoice Status     Equals       b)     Invoice Approved Date     Between to       b)     Invoice Submit Date     Detween to	D       4       AND       5       Edit         reen        04/12/2         Between        04/2          Any ×       04/12/2         ween        04/12/2         Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM          Ethic L2:00 AM	2024 2024 2024 24 É	<ul> <li>➡ to </li> <li>➡ to </li> <li>➡ 12:00 AM </li> <li>➡ 12:00 AM </li> </ul>		× × ×

#### STEP 2 - NAME AND CHOOSE WHERE THE REPORT WILL BE SAVED

1 Scroll down to the Details section, which has 2 compulsory fields indicated with a \*, namely Name and Folder:

Details		
Name * 🛈		
Folder *		
rolder*		
Output Format *		
● XLSX ○ XLS ○ CSV ○ CSV Data Only ○ PDF ○ JSON ○ View Data on Screen		
Description (optional)		
Remaining: 1000		
Show More Configuration		
	Continue Save Run Now Cancel	

2 Complete the compulsory fields.

Field name	Description
Name	Capture a name for the report. This is a free-text field where you can give the report a meaningful name.
Folder	Use the dropdown arrow to select a folder where the report should be saved

An example is displayed below:

Details					
Name * 🔒					
Supplier I	nvoice Repo	rt			
Folder *					
Status					~
Output Forr	nat*				
XLSX	⊖ xls	⊖ csv	🔘 CSV Data Only		O View Data on Screen
Description	(optional)				
				 Remain	

#### STEP 3 - REMOVE FIELDS THAT ARE NOT NEEDED

1 Remove any fields that should not be displayed on the report by clicking on the **X** on the right-hand side of the line item. In this example, we have chosen to remove the Consolidated Invoice ID from the report.

÷	×	Consolidated Invoice	Consolidated Invoice ID	Consolidated Invoice ID	$\sim$	×	

#### **STEP 4 – ADD EXTRA FIELDS AND FILTERS**

It is possible to include additional fields if needed for the report by searching for the fields and dragging them onto the column structure on the right-hand side of the screen.

- 1 To include additional fields, search for the relevant field name by typing the word in the Search field and using  $^{\sf Q}$ .
- 2 Drag the located field name across to the column structure on the right-hand side.

**Important**: If more than 1 field displays on the search, make sure that the module is correct before proceeding. For example, the document number field may be relevant to a number of different modules such as Invoice and Consolidated Invoice. Ensure that the correct module is displayed against the additional field added.

Invoice Change			Module	Data Fiel	d Name		Display Name	Sor	t Order	×
					Drop fields here to	group	by in the report			
<pre></pre>										
Fields 🛛 🛛 🛱 T # 🚳	Colur	nns								
			Module	Data Fiel	d Name		Display Name	Sor	t Order	×
Search For Fields Q	÷	×	Job Posting	Job Posti	ng Title		Job Posting Title		~	×
> Hiring Status	÷	×	Invoice	Invoice Li	ne Item Amount	Σ	Invoice Line Item Amount		~	×
> Hours Worked	÷	×	Invoice	Invoice Li	ne Item Date		Invoice Line Item Date		~	×
> Latest Work Order	÷	×	Invoice	🛕 Invoic	e Line Item End Date		Invoice Line Item End Date		~	×
> Legal Entity	÷	×	Invoice	Invoice Ta	x/Adj Amount	Σ	Invoice Tax/Adj Amount		~	×
Profile Worker     Qualification	÷	×	Invoice	Invoice A	nount	Σ	Invoice Amount		~	×
> Qualifications	÷	×	Invoice	Business	Unit		Business Unit		~	×
> Rate Change Matrix	÷	×	Invoice	Billable H	ours	Σ	Billable Hours		~	×
> Rate Schedule	÷	×	Consolidated Invoice	Consolida	ated Invoice ID		Consolidated Invoice ID		~	×
> Rates	÷	×	Invoice	Cost Cen	ter		Cost Center		~	×
<>					Drop fields here	to add	to the report			

In this example, the final column structure selected is displayed below:

÷	×	Invoice	Invoice Line Item Date	Invoice Line Item Date	~	) ×
÷	×	Invoice	Invoice ID	Invoice ID	~	×
÷	×	Invoice	Invoice Code	Invoice Code	~	) ×
÷	×	Invoice	Invoice Status	Invoice Status	~	×
÷	×	Invoice	Worker	Worker	~	) ×
÷	×	Time Sheet	A Time Sheet ID	Time Sheet ID	~	×
÷	×	Time Sheet	A Time Sheet Start Date	Time Sheet Start Date	~	) ×
÷	×	Time Sheet	A Time Sheet End Date	Time Sheet End Date	~	×
÷	×	Invoice	A Invoice Line Item ID	Invoice Line Item ID	~	) ×
÷	×	Invoice	Invoice Line Item Type	Invoice Line Item Type	~	×
÷	×	Invoice	Line Item Entry Name	Line Item Entry Name	~	) ×
÷	×	Invoice	Invoice Line Item Amount	Invoice Line Item Amount	~	×
÷	×	Invoice	Invoice Tax/Adj Amount	Invoice Tax/Adj Amount	~	) ×
÷	×	Invoice	Invoice Amount	Invoice Amount	~	×
÷	*	Invoice	Business Unit	Business Unit	~	) ×
÷	×	Invoice	Billable Hours	Billable Hours	~	×

- 3 Select save
- 4 Select
- 5 You can now amend and add extra filters to the report, based on user requirements. Available filters are dependent on the columns or fields selected for the report.

In this example, the final filter selections used to run the report are displayed below. We need the report to display the details of all invoices:

- approved between 1 December 2023 and 17 April 2024; and
- in any status.

Selected Filters	
Filter Logic 1 AND 2 Edit	
1     Invoice Status     Equals     V	×
2         ☐         Invoice Approved Date         Between         ✓         12/01/2023         ☐         12:00 AM         ✓	×
to 04/17/2024 💾 12:00 AM 🗸	
Drop filters here to add to the report	

#### **STEP 5 – RUN THE REPORT**

After the columns or fields have been selected and the filters are set up, you can run the report.

1 Click Run Now to execute the report.

**Note**: Reports can be run as XLSX, PDF, which means that they will be exported directly to Excel, Adobe, etc. If the user wants to display the report in Fieldglass directly, the **View Data on Screen** option can be selected. In this instance, certain items displayed in blue have a drill-down functionality within Fieldglass. This drill-down functionality is not applicable for reports that have been exported.

### Formatting

utput Format	Font Name	Font Size
XLSX 🗸	Arial	9,00
XLSX		
XLS	Page Size	
CSV CSV Data Only	Letter	~]
PDF	17.	

**Tip**: Once the report has been created, you can make a copy of it by clicking on **Actions – Copy Report**. The user can then add any additional fields needed.

In some instances, if a field has been selected that is specific to the module, ie SOW or Contingent, the user may **not** have access to the other module's data. In other words, if the user makes changes and is getting less data, it is recommended that the added fields are reviewed.