Fieldglass Supplier
Creating Reports

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The purpose of this guide is to show suppliers how to create a report that details important information about Fieldglass invoices, including the following:
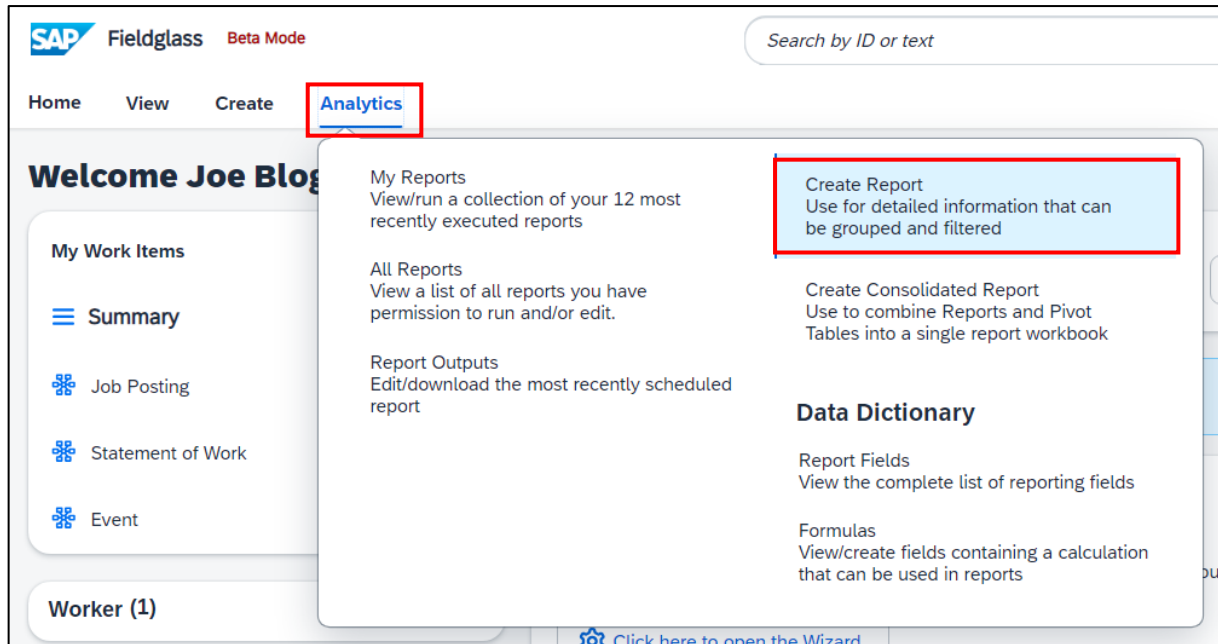
- The Fieldglass invoice number.
- Which timesheet the invoice relates to.
- Which worker is involved.
- The relevant period.
- Any applicable Statement of Work (SOW) characteristics.

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

Invoice Line Item	Invoice ID	Invoice Code	Invoice Status	Worker	Time Sheet ID	Time Sheet	Time Sheet End Date	Invoice Line Item ID	Invoice Line Item Type	Line Item Entry Name	Invoice Line Item	Invoice Tax/Adj	Invoice Amount	Business Unit	Billable Hours
01/01/2024	NDBKPI00000105	RR607	Approved					NDBKPE00000030	Event		10,000.00	0.00	10,000.00	Group Procurement	0.00
01/31/2024	NDBKPI00000104	TEST01	Payment Pending					NDBKPS00000355	Schedule		50,000.00	7,500.00	57,500.00	Group Procurement	0.00
02/01/2024	NDBKPI00000132	4500013924RR	Approved					NDBKPE00000048	Event		20,000.00	0.00	20,000.00	Group Procurement	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	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	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	40.00
02/18/2024	NDBKIN00037524	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	40.00
02/23/2024	NDBKPI00000107	1234543	Payment Pending					NDBKPE00000020	Event		2,200.00	330.00	2,530.00	Group Procurement	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	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	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	14.00
03/01/2024	NDBKPI00000106	JOHN3	Payment Pending					NDBKPE00000033	Event		1,000.00	150.00	1,150.00	Group Procurement	0.00
03/01/2024	NDBKPI00000116	RR4500013850INV	Payment Pending					NDBKPS00000628	Schedule		600.00	90.00	690.00	Group Procurement	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	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	40.00
03/16/2024	NDBKPI00000114	RR4500013848	Payment Pending					NDBKPS00000625	Schedule		600.00	90.00	690.00	Group Procurement	0.00
03/16/2024	NDBKPI00000115	RR4500013850	Payment Pending					NDBKPS00000627	Schedule		400.00	0.00	400.00	Group Procurement	0.00
03/19/2024	NDBKPI00000112	Rishi Invoice Test 1	Payment Pending					NDBKPS00000620	Schedule		50.00	0.00	50.00	Group Procurement	0.00
03/19/2024	NDBKPI00000113	Rishi Invoice Test 2	Payment Pending					NDBKPS00000509	Schedule		40.00	0.00	40.00	Group Procurement	0.00
03/20/2024	NDBKMI00000915	Misc_20240320_1	Payment Pending	Hundred, Two				NDBKMI00000915	Miscellaneous	Miscellaneous	100.00	15.00	115.00	Group Procurement	0.00
03/20/2024	NDBKMI00000917	Misc_Credit_20240	Payment Pending	Hundred, Two				NDBKMI00000917	Miscellaneous	Miscellaneous	-100.00	-15.00	-115.00	Group Procurement	0.00
03/29/2024	NDBKPI00000130	I5 VAT Test	Payment Pending					NDBKPE00000032	Event		5,000.00	750.00	5,750.00	Group Procurement	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	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	-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	42.00
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	23.00
03/31/2024	NDBKPI00000133	RR4500013925	Payment Pending					NDBKPE00000050	Event		50,000.00	7,500.00	57,500.00	Group Procurement	0.00
03/31/2024	NDBKPI00000135	RR4500013926	Payment Pending					NDBKPE00000052	Event		100,000.00	15,000.00	115,000.00	Group Procurement	0.00
04/02/2024	NDBKPI00000134	RRRRR450001392	Payment Pending					NDBKPE00000051	Event		100,000.00	15,000.00	115,000.00	Group Procurement	0.00

Supplier Invoice Report (Invoice Approved Date Between 12/01/2023 and 04/17/2024)
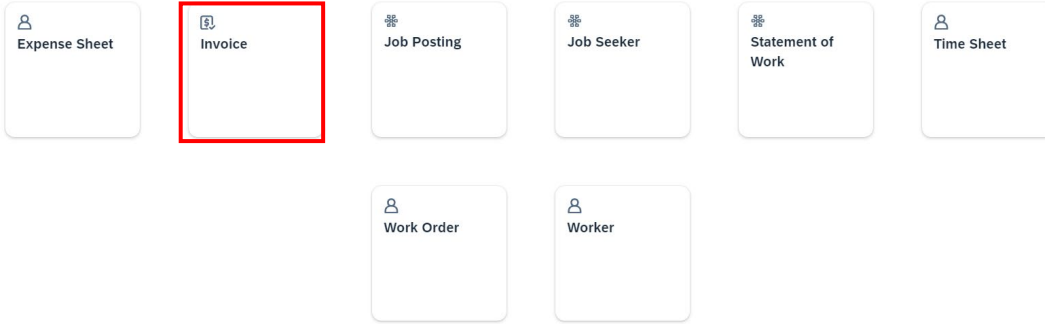
1 Select **Analytics > Create Report** from the **Menu** bar.

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.

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

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:

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.

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 🔍 .
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.

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	⚠ Time Sheet ID	Time Sheet ID	⌄	×
⇳	⌄	Time Sheet	⚠ Time Sheet Start Date	Time Sheet Start Date	⌄	×
⇳	⌄	Time Sheet	⚠ Time Sheet End Date	Time Sheet End Date	⌄	×
⇳	⌄	Invoice	⚠ 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 Σ	Invoice Line Item Amount	⌄	×
⇳	⌄	Invoice	Invoice Tax/Adj Amount Σ	Invoice Tax/Adj Amount	⌄	×
⇳	⌄	Invoice	Invoice Amount Σ	Invoice Amount	⌄	×
⇳	⌄	Invoice	Business Unit	Business Unit	⌄	×
⇳	⌄	Invoice	Billable Hours Σ	Billable Hours	⌄	×

3   Select **Save** .

4   Select **Continue** .

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 ⌄	Any ×	⌄	⟲			×
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

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.