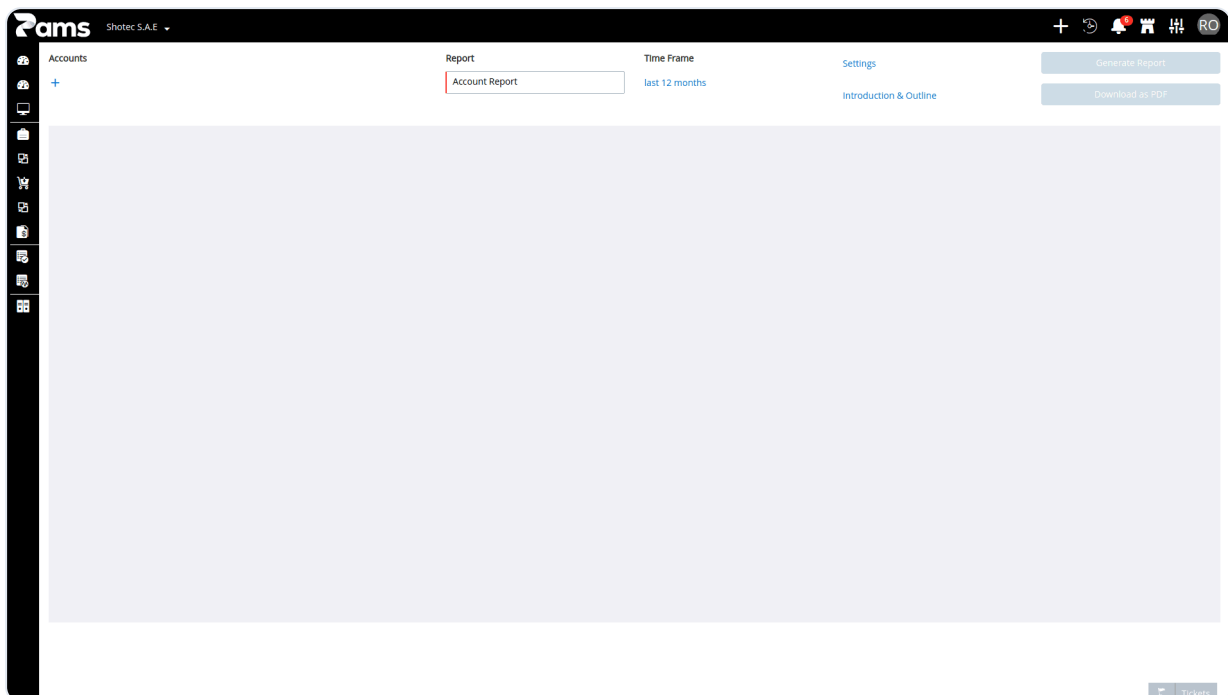


PrincipalReport

July 31, 2026

PrincipalReport

Applications > PrincipalReport*PrincipalReport*

Overview

PrincipalReport is used to prepare, generate, and export a named report as a PDF file. Use it when you need a report for review, sharing, or record keeping, and when supporting files may need to accompany the report. Sales, PM, Purchasing, Warehouse, and Finance users can access the feature from **Reports** or from the relevant application area.

Settings

Before generating a report, provide a clear report name and, where required, attach the files that support the report.

Setting	Purpose
Enter Report Name...	Enter the name used to identify the report.
files[]	Displays the files associated with the report. Use Attach to add supporting files.

Tip: Use a report name that identifies the business purpose and reporting period, such as `July 2026 Job Profitability Review`.

If you need to work from a different functional area, use the available application controls such as **Sales**, **PM**, **Purchasing**, **Warehouse**, or **Finance** before returning to the report.

Workflow

Decide whether the report needs supporting files

1. In **Applications > PrincipalReport**, enter a descriptive value in **Enter Report Name....** The report name should make the generated output easy to identify later.
2. If the report must include supporting documentation, select **Attach** and add the required files. Review the associated items in **files[]** before generating the report.

Note: Attach only files that are relevant to the report. The screen does not provide a separate file classification or approval action.

Decide whether the report is ready to generate

3. When the report name is complete and any required files are attached, select **Generate Report** to create the report.
4. If a confirmation or message is displayed after generation, select **Ok** to acknowledge it and continue.

Decide whether to export the completed report

5. To save or share the generated report, select **Download as PDF**. This downloads the report in PDF format.

6. If you need to review related tickets while working on the report, select **Tickets**.
Return to the report when you are ready to continue generating or downloading it.

Warning: Generate the report only after confirming the report name and supporting files. The available screen does not show a separate revision, version, or approval stage.

Examples

A PM needs a PDF report for a monthly project review and wants to retain the supporting documents with the report.

1. Open **Applications > PrincipalReport**.
2. In **Enter Report Name...**, enter `July 2026 Project Review`.
3. Select **Attach** and add the relevant supporting files. Confirm that the files appear in **files[]**.
4. Select **Generate Report** to create the report.
5. Select **Ok** if the system displays a message requiring acknowledgement.
6. Select **Download as PDF** to download the completed `July 2026 Project Review` report for distribution or filing.

Tips

Tip: Use consistent naming for recurring reports. For example, include the month, year, project, account, or job reference in the report name.

Note: Review **files[]** before selecting **Generate Report** to ensure that the required supporting files are associated with the report.

Troubleshooting

Symptom	Likely cause	Fix
The report is difficult to identify after download.	The value in Enter Report Name... is unclear or too general.	Use a specific report name before selecting Generate Report .

Symptom	Likely cause	Fix
Required supporting documentation is missing from the report record.	Files were not added before report generation.	Select Attach , add the required files, and verify them in files[] .
A message remains on screen after generating the report.	The message requires acknowledgement.	Select Ok to acknowledge the message.
A PDF is not available.	The report has not yet been generated.	Select Generate Report , acknowledge any message with Ok , then select Download as PDF .

Related pages

- [PrincipalReport — Overview](#)
- [PrincipalReport — Learning Path](#)