

Find Cost

 Here you will learn how to find cost cards in Projector. A cost card typically represents an outlay on a single receipt. Once cost cards are found, there is a wealth of additional options for you. You can group cards together for batch administration, configure your view to show relevant detail columns, save searches for later, share searches, and even edit cards.

Permissions and Settings

Any user can find their own cost cards in Projector. The following permissions give Administrators and Project Managers expanded access.

- A user with the [cost center permission](#) to **View Resource/Disbursed Expense Reports**
- A user with the [cost center permission](#) to **View Resource/Disbursed Other Expense Documents**
- A user with the [cost center permission](#) to **View Project Expenses**
- A user with the [cost center permission](#) **Management Approval of Invoices** to view cost cards already on an invoice
- A user with the [cost center permission](#) **Create and Approve Invoices** to view cost cards already on an invoice
- **Be a cost approver** in some way. For example, you are a PM on a project set to PM approval.
- When viewing a resource's profile, you are set as the **Direct Manager** for cost
- Limited Access users can only use a subset of search criteria and result columns in order to prevent them from accessing data outside their purview
- Client users can also approve costs. Useful when client must okay all work before it can be invoiced. See [Configure Clients to Approve Expenses](#).

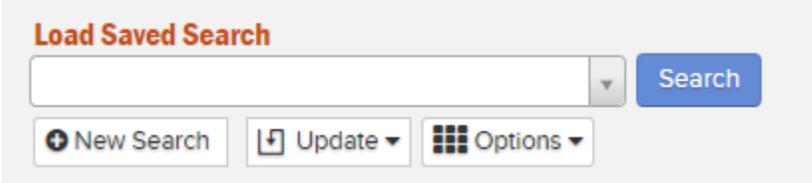
Cost card results are limited by the user's permissions.

To share searches with others and to modify shared searches, you must have the [global permission](#) **Maintain Public Reports and Saved Searches**.

Saved Searches

One awesome thing about save searches which may not be immediately obvious is that more than just your criteria is saved. Your result columns, column order, and column widths are also saved. Customize your searches to meet your individual business needs. If you want, you can also publish those saved searches to the rest of your organization. Turning your productivity boosting searches into organization wide productivity boosters.

Saved searches are accessible from the dropdown in the upper right.



Once you choose a saved search from the list, the criteria is immediately loaded. You'll then need to click **Search** to execute the query.

Save New Search

Follow these steps:

1. Click **New Search** or load one of your existing saved searches
2. Set your search criteria
3. Run your search
4. Adjust the displayed columns and column order
5. Adjust your column widths
6. Click **Save** if this started as a new search. Click **Update | Save As** if it is based on an existing search.

Modify Saved Search

Follow these steps:

1. Load an existing saved search
2. Set your search criteria
3. Run your search
4. Adjust columns and column order
5. Adjust column widths
6. Click **Save Changes**

Remove Saved Search

Follow these steps:

1. Load an existing saved search
2. Click **Update | Delete**

Favorites

Favorites not only appear under your saved search dropdown list, but also underneath the Favorites menu in your navigation bar. Favorites are denoted by a yellow star icon, .

To mark a favorite, load a favorited search. Then pick **Update | Make Favorite**.

To remove a favorite, load a favorited search. Then pick **Update | Remove from favorites**.

Share Search

When you save a search or update an existing search, you have the ability to share it. The following share options are available:

- **Do not share**
- **Privately share** - to individuals
- **Publicly share** - to individual users or to groups of people in your organization based on your installation's [user types](#) and [cost centers](#)

Rename and share

Specify how you would like to name and share the search. The sharing options determine who can view and modify the search.

Name this search:

Add to favorites 

Select a sharing option:

Do not share

Privately share this search with specific users (only you can modify this search)

Publicly share with specific users and user types (modifiable by permitted users)

in 

in

Search Builder

The search builder is designed to quickly design a search that finds exactly what you need.

Find Time Cards Where:

☰	Work Date	This month	+	🗑️	Set search field parameters
		01-30 Jun 2015			
☰	Approval Workflow Status	Submitted		🗑️	
		Note: Missing Time will not be returned unless explicitly requested.			
+	Add more search criteria				Add search field

Icon	Description
🗑️	Remove this criteria
+	Add a new criteria
☰	Drag to reorder search criteria order

Search Criteria

The following fields are searchable. Results are shown as of the current state of the system. For example, if a resource changes location, cost card's are returned based on their location as of today, not the date of the card. User Defined Fields (UDFs) are automatically populated in for clients, engagements, projects, roles, resources, and cost cards.

Search Results

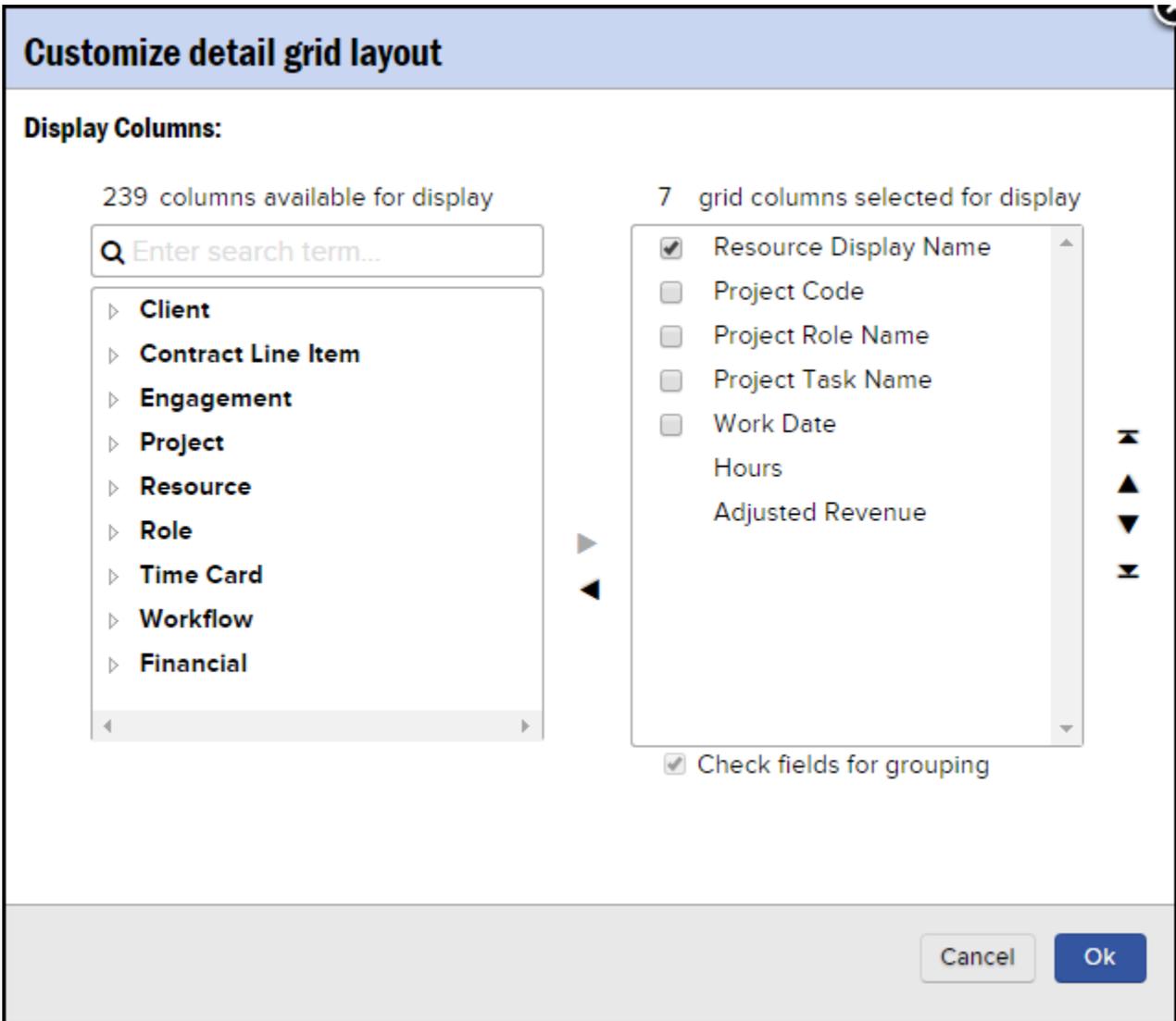
The results grid isn't your every day results grid. It functions very similarly to a pivot table and allows you to group and subgroup cards. You can then select cards individually, or by group. Once cards are selected, there are a wide range of actions you can take. From [approval](#) to [adjusting the financials](#).

In the screenshot below you can see a card search grouped by resource. The darker rows show rolled up information. The lightest rows show individual cards. If a column can't be rolled up into a single value, we display *multiple* as a placeholder.

Result Columns and Result Grouping

When you get your search results, you can customize your columns. Resize or reorder by dragging them. Or, click ☰ to add/remove columns, set order, and apply grouping. You can save your columns settings as part of your saved search.

To group a column, tick the checkbox next to it.



Available Columns

The following search result columns are available.

Summary Search Results

For most users, you won't need to leverage summary results. The pivoting capabilities of the normal results grid is sufficient. However, power users and those executing searches on very large numbers of cards will want to use summary results.

To enable summary results, click **Options | Customize results grids | Grid Display Options | Summary Grid with Details**.

With your summary grid activated, you'll see two results section. The upper results are a straight grouping of cards. Clicking on one of the rows in the upper section displays its details in the lower section. The two results areas are independently controlled. Each having its own columns, column order, column width, and groupings.