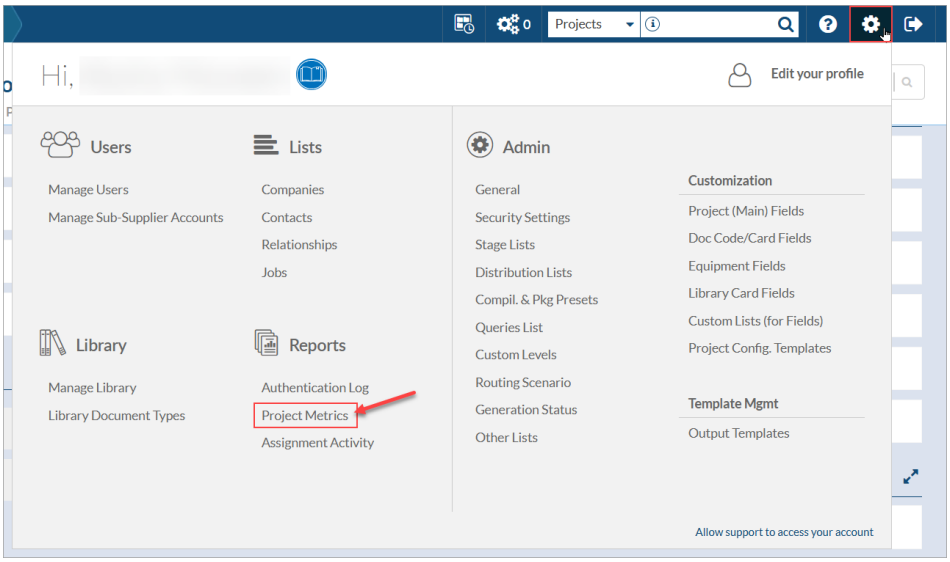
Project Metrics

09/28/2026 9:46 am MDT

Looking for KPI's for internal reporting purposes? Check out the Project Metrics Report (**System Menu >Reports > Project Metrics**)

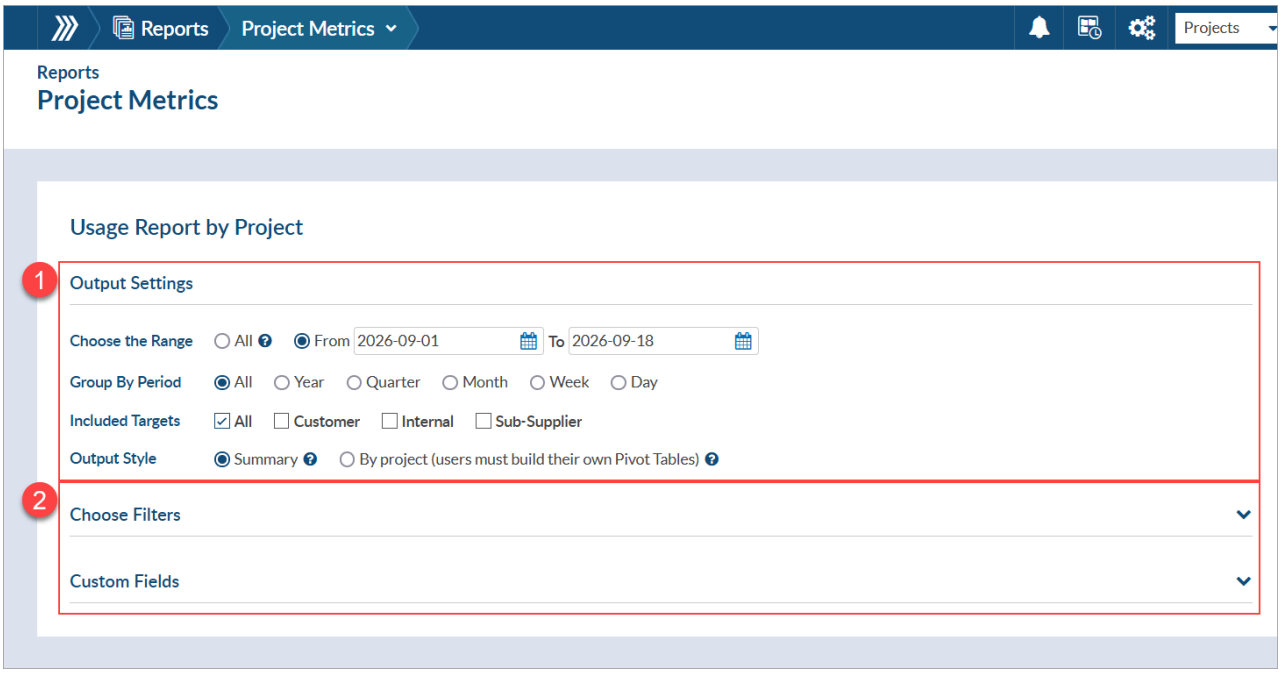


Set the Parameters

Before running the report:

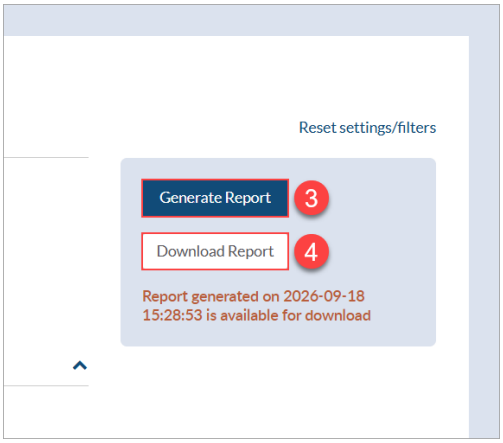
(1) Define the output settings - set the date range, grouping method, etc.

(2) Set the filters - choose to filter by affiliate, project, customer, etc.**and/or** by custom field(s).



With the options set to your preferences, click "Generate Report" (3). Once generation is complete, download the

report by clicking "Download Report" (4).



Output settings definitions

Choose the Range = The total timeline over which you wish to execute your search.

- If you end on a date halfway through the month, the data will be cut off at that date.

Group by Period = The results will include an entry for every period over the range.

- Week is Monday to Sunday. These will display as numbers (# week of the year).
- Quarter is Jan 1 – March 31, etc.. Will display as 2015-01 to 2015-03.

Included Targets = you can choose to limit the results for transactions focused to a specific target. e.g if you choose the customer, only customer transmittals will be included in the analysis.

- If you choose ALL, then the results will be grouped together, AND provided as a segment for each target.

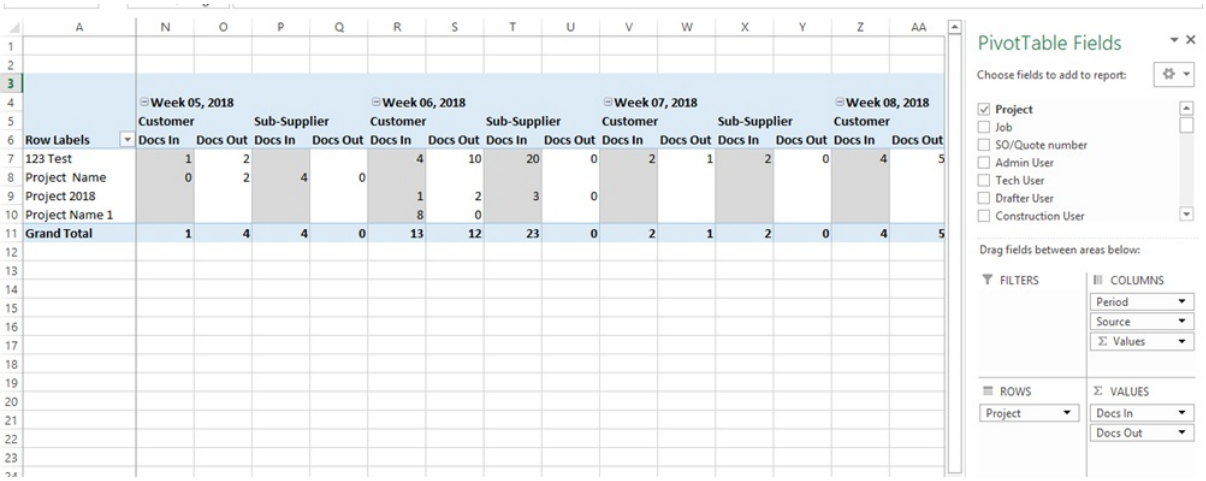
Output Style - Summary:

This output is delivered in a table format. Rows are the parameters, columns are the periods/source.

	A	B	C	D	E	F	G	H
1	Variable Name	2017-10 to 2017-12	2018-01 to 2018-03	2018-04 to 2018-06	2018-07 to 2018-09	2018-10 to 2018-12	2019-01 to 2019-03	2019-04 to 2019-04 (to 2019-04-22)
2	Submittals received	23	6	19	25	23	32	0
3	Files assigned (from submittals)	100	11	344	69	42	159	1
4	Submittals sent	68	7	16	12	38	69	1
5	Files sent	74	8	17	13	49	73	3
6	Files per submittal	1.1	1.1	1.1	1.1	1.1	1.1	3
7	Submittals per card	3.9	2.7	1.3	4.3	2.7	3	3
8	Average days out (returned files only)	0.1	0	1.3	0.4	0.7	1.5	0
9	Files sent and returned	31	2	4	5	27	35	0
10	Files processed via auto-reclaim	9	0	2	1	24	18	1
11	Files sent via Ad-Hoc submittals	3	0	0	0	26	7	0
12	# of workflows with due dates in period	96	70	222	95	58	84	3
13	Files submitted on time	23	37	6	3	4	37	2
14	Instance on time delivery	24%	53%	3%	3%	7%	44%	67%
15	Count of overdue cards	73	103	319	409	459	506	496
16	Avg days overdue (only for overdue docs)	13.6	36.2	30.7	49.8	73.4	95.2	98.6
17	# of workflows expected in period	54	7	14	17	37	61	11
18	# of workflows received before expected date	32	2	3	6	24	29	7
19	On time receipt %	59%	29%	21%	35%	65%	48%	64%
20	Approved	27	3	124	21	17	35	0
21	Returned to Revise	51	7	170	39	11	26	0
22	OUT with Customer	78	11	112	8	15	83	1
23	OUT with Customer, overdue	16	5	25	14	31	57	0
24	OUT with Customer, not due yet	29	1	39	46	17	41	0
25	Total projects started (or converted from quote to order)	3	2	6	2	1	4	0
26	Total projects closed	0	0	1	0	0	2	0
27	Total projects open for full period	3	2	6	2	1	4	0
28	Average routing TAD for Admin	0	0	0	0	0	0	0
29	Average routing TAD for Tech	0	0	0	0	0	0	0
30	Average routing TAD for Drafter	0	0	0	0	0	0	0
31	Average routing TAD for Construction	0	0	0	0	0	0	0

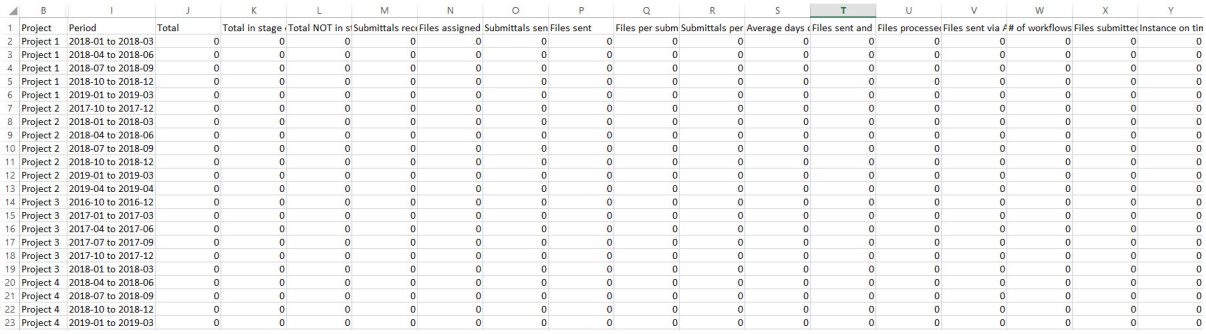
Output Style - By Project

This output contains a separate row for each unique combination of project + period + source. You will have to construct the tables for each project as you wish – generally by building a pivot table (with the parameters as rows, and periods across the top.)



Row Labels	Week 05, 2018 Customer Docs In	Week 05, 2018 Customer Docs Out	Week 05, 2018 Sub-Supplier Docs In	Week 05, 2018 Sub-Supplier Docs Out	Week 06, 2018 Customer Docs In	Week 06, 2018 Customer Docs Out	Week 06, 2018 Sub-Supplier Docs In	Week 06, 2018 Sub-Supplier Docs Out	Week 07, 2018 Customer Docs In	Week 07, 2018 Customer Docs Out	Week 07, 2018 Sub-Supplier Docs In	Week 07, 2018 Sub-Supplier Docs Out	Week 08, 2018 Customer Docs In	Week 08, 2018 Customer Docs Out
123 Test	1	2			4	10	20	0	2	1	2	0	4	5
Project Name	0	2	4	0										
Project 2018					1	2	3	0						
Project Name 1					8	0								
Grand Total	1	4	4	0	13	12	23	0	2	1	2	0	4	5

For more on how to create pivot tables, check out this tutorial (***NOTE: External content***): https://support.microsoft.com/en-us/excel/get-started/create-a-pivottable-to-analyze-worksheet-data



Project	Period	Total	Total in stage	Total NOT in st	Submittals rec	Files assigned	Submittals sen	Files sent	Files per subm	Submittals per	Average days	Files sent and	Files processe	Files sent via	# of workflows	Files submitte	Instance on tin
Project 1	2018-01 to 2018-03	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 1	2018-04 to 2018-06	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 1	2018-07 to 2018-09	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 1	2018-10 to 2018-12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 1	2019-01 to 2019-03	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 2	2017-10 to 2017-12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 2	2018-01 to 2018-03	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 2	2018-04 to 2018-06	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 2	2018-07 to 2018-09	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 2	2018-10 to 2018-12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 2	2019-01 to 2019-03	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 2	2019-04 to 2019-04	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 3	2016-10 to 2016-12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 3	2017-01 to 2017-03	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 3	2017-04 to 2017-06	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 3	2017-07 to 2017-09	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 3	2017-10 to 2017-12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 3	2018-01 to 2018-03	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 4	2018-04 to 2018-06	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 4	2018-07 to 2018-09	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 4	2018-10 to 2018-12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Project 4	2019-01 to 2019-03	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

For more detail about the specific fields in the report, see this article: Project Metrics - Description of each metric.

Download

Currently, only one user can execute a search at a time. The results are downloaded in CSV files – but if you open in Excel, you will be able to see the result sets as defined above. We suggest you save the results as Excel files.

Required User Permissions

Running and accessing the project metrics report requires a Full (or higher) license. If you do not see this option, please contact your DocBoss administrator.

