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**Fusion Reports SOP**

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| Sr. No. | Date | Version |
| 1 | 20/03/2025 | SAS-REP-SOP-V1 |

Fusion Tools Tab

# Reports and Analytics (Add Reports in Favourites)

1. Go to Fusion click on tools > Reports & Analytics

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1. Click on Browse Catalog

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1. From the left panel, browse to the below path:
2. Shared > Custom > SAS Custom > Reports > PA > Reports

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1. Choose the relevant report and add it to favourites

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1. Favourites will be shown in Reports and Analytics tab

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# Reports from Fusion

## Submit for Chargeable

1. Click on Projects > Project Financial Management

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1. Enter as below:
2. Project Number (Between) = 510% - 760%
3. Organization (Starts With) = 4571
4. Project Status = Submit for Chargeable (Project Owner)

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1. Click on “View” and under Columns – Show All. Export this in Excel file.

A screenshot of a search results

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1. TCS maintains a consolidated file for “Submit for Chargeable”
2. By pasting previous Submit for Chargeable project numbers and identifying duplicates, remaining project numbers (new) are added to the consolidated file
3. This consolidated file helps us track the ageing of Submit for Chargeable project status.

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## Submit for Change

1. Click on Projects > Project Financial Management

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1. Enter as below:
2. Project Number (Between) = 510% - 760%
3. Organization (Starts With) = 4571
4. Project Status = Submit for Change (Project Owner)

A screenshot of a computer

AI-generated content may be incorrect.

1. Click on “View” and under Columns – Show All. Export this in Excel file.

A screenshot of a search results

AI-generated content may be incorrect.

1. TCS maintains a consolidated file for “Submit for Change”
2. By pasting previous Submit for Change project numbers and identifying duplicates, remaining project numbers (new) are added to the consolidated file
3. This consolidated file helps us track the ageing of Submit for Change project status.

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## SAS Detail to Be Invoice Report

1. Click on “SAS Detailed To be Invoiced Rep.xdo”

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1. Enter details:
2. Business Unit = BU\_CC\_XXX
3. Project Owner = Project Owner’s name
4. Send Email = Y (Only if the reports are to be sent to Project Manager)
5. Bill Through Date = MM-DD-YYYY
6. Click Apply

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For report sample click [link](https://sasoffice365-my.sharepoint.com/:x:/g/personal/himanshu_singh_external_sas_com/EaQw62_giGtCg5sM0vpUieMB31EtJ4X4amYXZJrndgqMOQ?e=SYhxNw).

1. Objective of this Report:
2. The “**SAS Detailed To Be Invoiced Report**” to Be Generated Before “Bulk Invoicing Window” to identify unbilled approved time cards.
3. To provide a detailed breakdown of invoice line items, which includes Billable and non-billable hours and their rates etc.
4. This report is generated only for the Time and Material invoicing

## SAS To be Invoiced Report

1. Go to Fusion click on tools > Reports & Analytics
2. Click on “SAS To be Invoiced Rep.xdo”

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1. Enter details:
2. Business Unit = BU\_CC\_XXX
3. Click Apply

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For report sample click link

1. Objective of this Report:
2. SAS To Be Invoiced Report to be generated before “Bulk Invoicing Window” for a high-level view of invoices
3. To match the detail of invoices as per “SAS Detail To Be Invoice Report”
4. This report is generated only for the Time and Material invoicing

## SAS Project Contract Configurations & Specifications Report

1. Go to Fusion click on tools > Reports & Analytics
2. Click on “SAS Project Contract Configurations & Specifications Rep.xdo”

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1. Search the report as per Project Number, Contract Number. Business unit (BU Name) is mandatory
2. Enter details:
3. Contract Number = CC\_XXX or Project Number = CC-XXX
4. Business Unit = BU\_CC\_XXX
5. Click Apply

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1. Once report completed, check downloads folder for excel file and upload the file in project > under documents tab

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## Missing Work Type Tax Code Report

1. Go to Fusion click on tools > Reports & Analytics
2. Click on “Missing Work Type Tax code on Rev Rec events”

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1. Objective of this Report:
2. To Identify missing Work Type – Tax Code and update it accurately in fusion Event.
3. The report should be run on WD 3
4. Missing Work Type – Tax Code should be updated Before 1 PM CET.

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1. Update Missing work type in Event under Additional Information

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## SAS PA Percent Spent Revenue Recognition Report

1. Go to Fusion click on tools > Reports & Analytics
2. Click on “SAS PA Percent Spent Revenue Recognition Report.xdo”



1. Enter details:
2. Period = Month
3. Business Unit = BU\_CC\_XXX
4. Project status = Approved
5. Contract status = All
6. Click Apply



1. Filter out blanks under Subcontractor Task Number Column

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1. Emails needs to be sent out to each Project Manager as per below format:

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1. Enter the Project Number, Subcontractor Task Number, Subcontractor Supplier Name, Accrual Amount for the month and Comments provided by Project Managers for each project
2. Refrain from sending requests for projects for which comments were received by respective Project Managers and by adding comments such as “No action needed as per previous month’s comments received” before uploading in Fusion
3. Upload the file in Fusion > Projects > Costs > Task > Capture Costs

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1. Prepare the template file on WD 1 and upload it before 1 pm CET time

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1. Add your initials in the Batch Description field
2. Create separate lines for multiple tasks under single subcontractor name
3. In case a single accrual amount is provided by Project Manager, divide amount by the number of tasks equally

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1. Fill the details in highlighted columns below
2. Select the right data under drop-down menu from each cell which will help in automatically populating relevant cells
3. In case of additional row requirements, add rows between the existing rows
4. In case of errors while uploading the file in Fusion, check if the date is in MM/DD/YYYY format, Fusion is in US settings, and Work Type – Tax Code is “Consulting on Premise USD”
5. If error persists, contact – Linda Evenhouse or Karen Milford

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1. After successful upload of the file, below output will be shown:

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1. Save the file to Teams as path below:
2. Documents > General > Reports > MEC > Accruals 202X
3. Rename the file by adding “\_month202X”

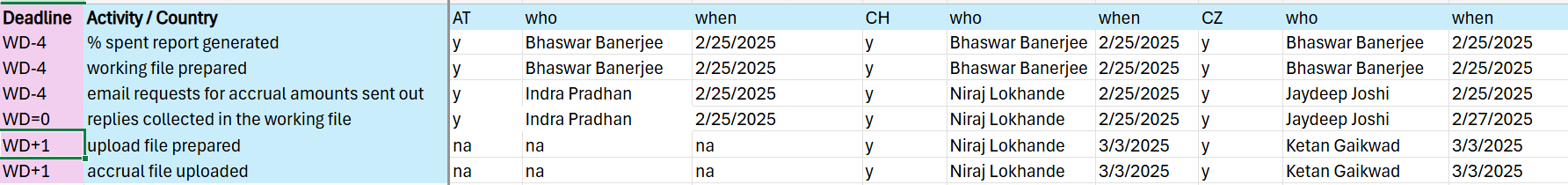
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1. Update the tracker for MEC accruals under below path:
2. Documents > General > Reports > MEC
3. If not records for a particular Business Unit, enter date of report extraction and N/A for other data
4. Tracker to be updated before WD 1 end of day

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## Projects Prepayment Report

1. Go to Fusion click on tools > Reports & Analytics
2. Click on “Projects Prepayment Report”

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1. The report will automatically run for current prepaid contracts

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1. Objective of this Report:
2. To identify the prepaid contracts in Fusion
3. The report shows all the prepayment & prepayment applied events created under individual contracts
4. The net amount of both prepayment & prepayment applied events gives understanding of whether deductions need to be done against the prepaid invoice

\*\*\*Process End\*\*\*

Escalation Matrix

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Level | Email Address | Landline/Phone Number |
| Bhaswar Banerjee | Level 1 | bhaswar.banerjee@sas.com | N/A |
| Agnieszka Bartuzi | Level 2 | agnieszka.bartuzi@sas.com | +48 22 560 45 83 |
| Beata Kienorow-Gulan | Level 2 | beata.kienorow-gulan@sas.com | +48 22 560 45 69 |