These are used to generate reports for one off items e.g. an incident or accident etc.
Using the filter fields you find the required incident.

- A. Edits the field selections and layout.
- B. Generates the Report.

B   A

A. Edit Fields & Layout

Click ✎ to make changes to the fields and layout of the report:
1. Tick if you wish to include Headers or Footers and select from the drop-down list – see notes.
2. Tick the fields that you wish to filter on or untick if not required for filtering.
3. To generate a report for a specific register, course and/or group etc, select them from the drop-down lists on the right – see section C on copying reports.
4. Under Display Fields – tick or untick to customise what fields are displayed in the report.
5. Use the up and down arrows ↑↓ to change the order in which these fields appear in the report.
6. Click 💾 SAVE.

B. Generate Reports

Click the Generate button and the report screen will open:
1. Select a date selection e.g. Last Month, Last Year or Custom – then you need to select a date range.
2. Make any selections as required from the fields listed – section A shows you how to change these.
3. Click **GENERATE**. This will then show you the data as per the filters.
4. You can now export the report to Excel or PDF.

C. Email Report

After you have made your selections, clicked Generate and a list of entries is displayed you can:
1. Click EMAIL.
2. Select from the Staff Contacts List.
3. Change the report name if required.
4. Click **SEND**.

The email will have a summary list of the tasks, along with any completed forms and documents for the selection.

D. Copy Report

Use this to create reports you regularly want to use:
1. Click Copy.
2. Type in a Name and Description.
3. Click **SAVE**.

You can now select a specific date range, training register, courses any data you wish as per section A.

1

Home / Report / Registers

Category	Register	Report Template
Registers ▾	Training ▾	▾

Add New Item ✕

Name	Description
2 Training First Aid	Yearly

3 SAVE   CANCEL

NOTES:

- Headers and Footers are created in Administration/Templates/Widgets

- They must have:
  Type = Report
  Status = Locked

Home / Administration / Templates / Widgets

📊 EXCEL	📄 PDF	▼ FILTER	✛ GROUP	Superseded ☐	Hide Versions ☐	
Docum... ⋮	V... ⋮	Title ⋮		Type ⋮	Status ⋮	Edit
A01	1	Standard Report Header		Reports	Locked	
A02	1	Standard Report Footer		Reports	Locked	
R001	1	Report Header		Reports	Creating	
R002	1	Report Footer		Reports	Creating	