



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.



Home / Report / Standard

ADD NEW

EXCEL	PDF	FILTER	GROUP	Name	Description	Register	Report Template	Document ID	Version
				Incident Reporting	Injury Only	Incident Reporting	Injury Incident Report-v1	SR003	1
				Incident Other	Non Injury Incident Report	Incident Reporting	Other Incident Report-v1	SR004	1
				Incident Other	Damage to Property	Incident Reporting	Other Incident Report-v1	SR004	2
				Vehicle Accident	Vehicle Accident	Vehicle Accident	Vehicle Accident Report-v1	SR001	1

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**.

Category: Registers Register: Training Report Template: [Empty]

Name: Training Description: Training Report

Include Header Header: [Empty] 1 Include Footer Footer: [Empty]

Filter Fields

- Dates
- Training Register
- Training Course
- Groups
- Staff
- Instructor
- Signed Off
- Document Stored
- Company
- Refresher Due

Dates: Custom Dates

Training Register: [Empty]

Training Course: [Empty] 3

Groups: GSG - PALLET PLANT x

Staff: [Empty]

Instructor: [Empty]

Signed Off: False True All

Document Stored: False True All

Display Fields

- Dates
- Training Register
- Training Course
- Groups

Dates	Training Register	Training Course	Groups	Staff	Instructor	Refresher Due	Company	Signed Off	Document Stored

4 5

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.

Report

1 Dates : Custom Dates

From: 01/03/2022 To: 31/08/2022

Training Register : _____

Training Course : _____

2 Groups : GSG - PALLET PLANT X

Staff : _____

Instructor : _____

Signed Off : False True All

Document Stored : False True All

4 3 GENERATE

EXCEL PDF

Dates	Training...	Training...	Groups	Staff	Instructor	Refresh...	Company	Signed Off	Docume...
01/07/2022	Training	Height Safety Training	GSG - Pallet Plant	Super Women	Big Fish		Fish Training Ltd	<input type="checkbox"/>	<input type="checkbox"/>

1 - 1 of 1 items

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.

EXCEL 1 EMAIL

Dates	Type	Asset Type	Asset Description	Completed By	Signed Off
04/07/2022	Maintenance	Motor Vehicles	AssetNo : zz1 , SerialNo : HT1 , Description : Mazda-323-Pink	Kermit Frog	<input checked="" type="checkbox"/>
10/11/2022	Maintenance	Motor Vehicles	AssetNo : zz1 , SerialNo : HT1 , Description : Mazda-323-Pink	Kermit Frog	<input checked="" type="checkbox"/>

2 Send Email

Staff Contacts

2 Lea AStarwars - rodj@timeplicity.co.nz

3 Report Name

P&E History

4 SEND CANCEL

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.

Home / Report / Registers

1 COPY BACK

Category: Registers Register: Training Report Template:

Add New Item

2 Name: Training First Aid Description: 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	

