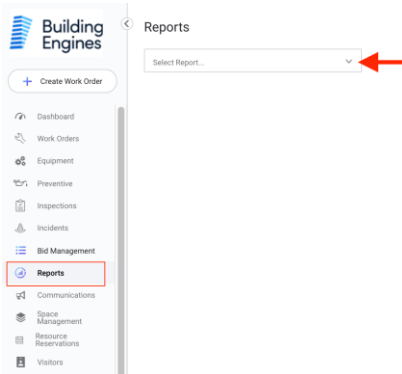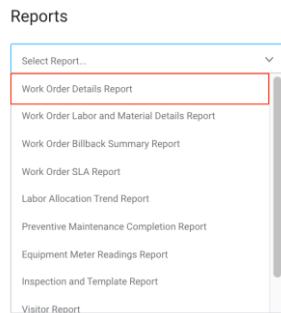**Reporting**

User Guide

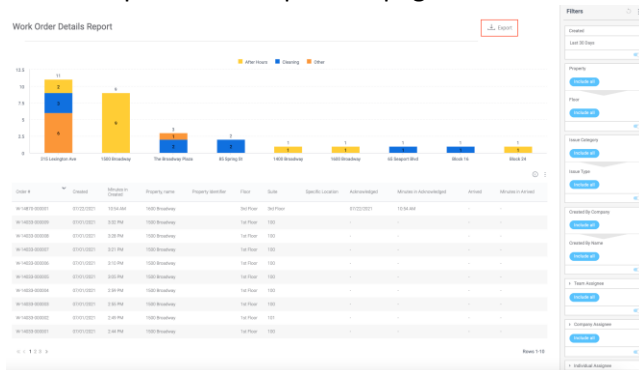**<u>Work Order Details Report</u>**

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.

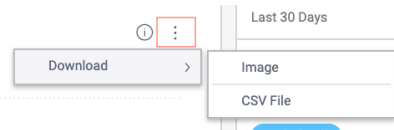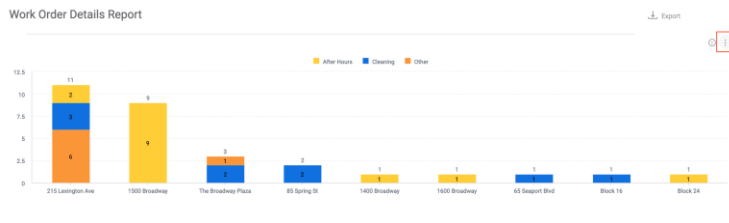2. Click Work Order Details report from the drop down.

3. Click export at the top of the page to download the entire report.

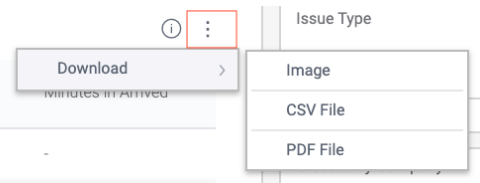4. Click on areas of the bar graph to view specific data.

5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.
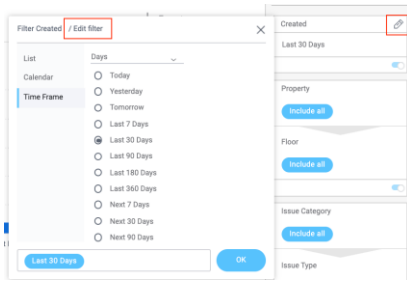

6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.
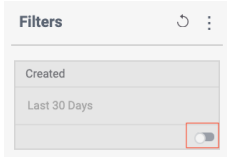

7. Filter the report using filter categories on the right-hand side of the page.
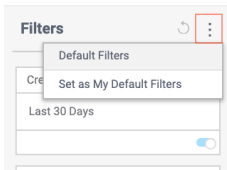

Hover at the top of a filter to click the pen icon and edit the filter.
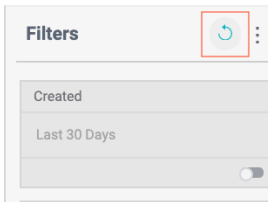
Click the toggle to disable a filter.

Click the three dots at the top of the filters bar to set default filters.

Click the back arrow next to the dots after making any changes to revert to default filter settings.

Work Order Billback Summary Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.
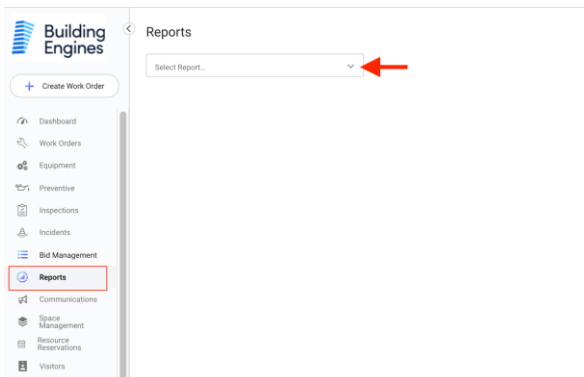
2. Click Work Order Billback Summary Report from the drop down.

3. Click export at the top of the page to download the entire report.

4. Click on areas of the bar graphs to view specific data.

5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.

6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

7. Filter the report using filter categories on the right-hand side of the page.

Hover at the top of a filter to click the pen icon and edit the filter.

Click the toggle to disable a filter.

Click the three dots at the top of the filters bar to set default filters.
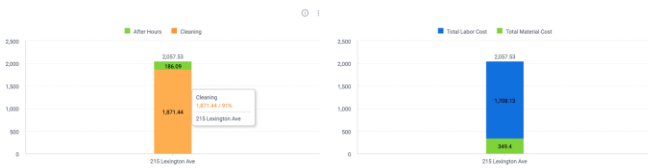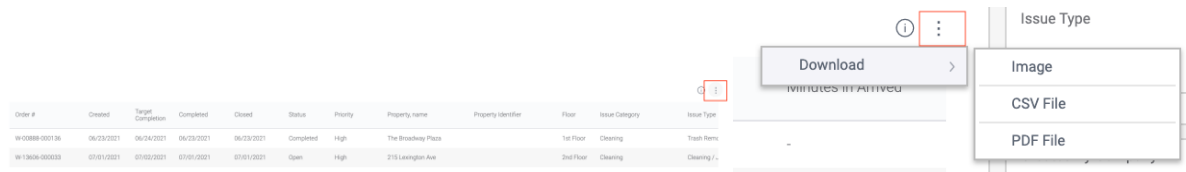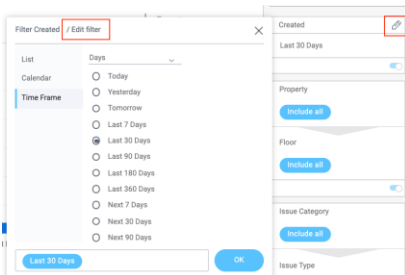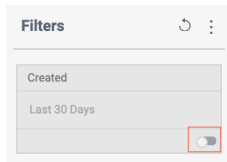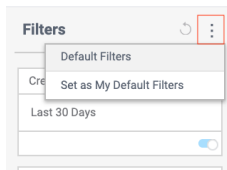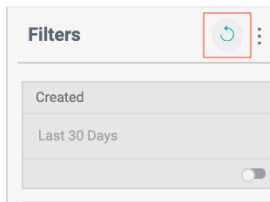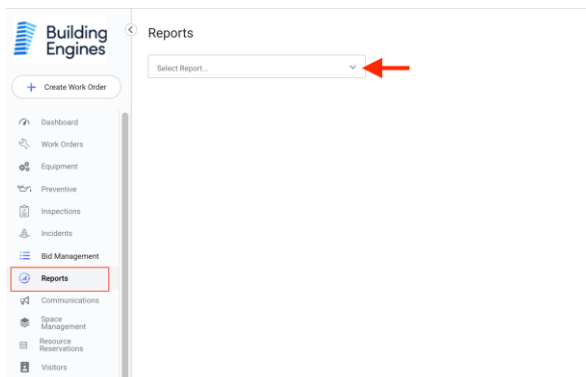

Click the back arrow next to the dots after making any changes to revert to default filter settings.

Work Order Labor and Material Details Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.

2. Click Work Order Labor and Material Details Report from the drop down.

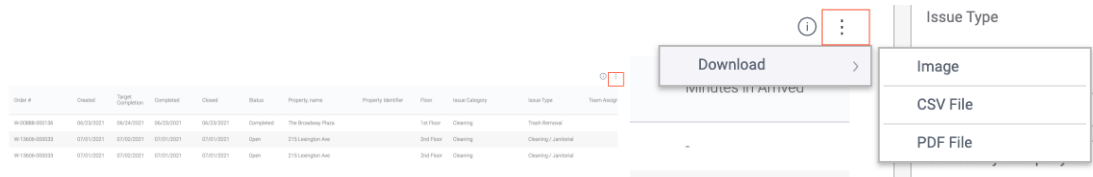3. Click export at the top of the page to download the entire report.

4. Click on areas of the graphs to view specific data.

5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.

6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

7. Filter the report using filter categories on the right-hand side of the page.

Hover at the top of a filter to click the pen icon and edit the filter.
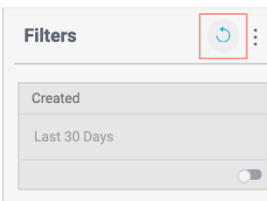

Click the toggle to disable a filter.

Click the three dots at the top of the filters bar to set default filters.
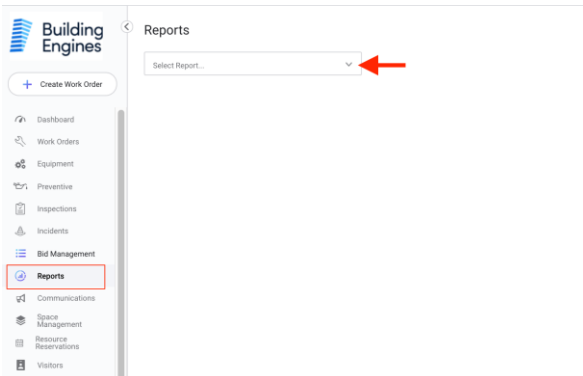

Click the back arrow next to the dots after making any changes to revert to default filter settings.
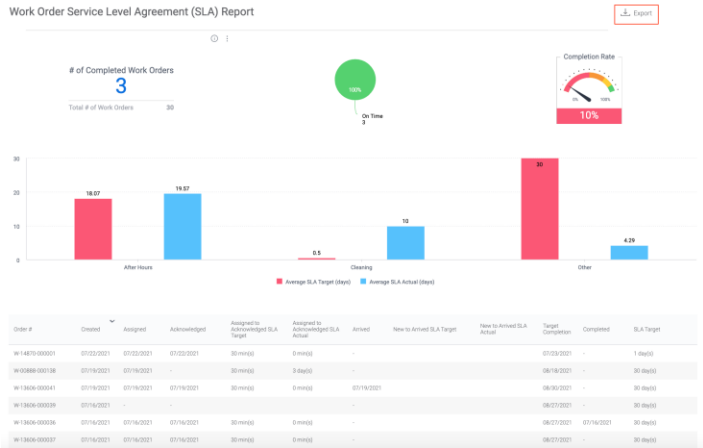

Work Order SLA Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.
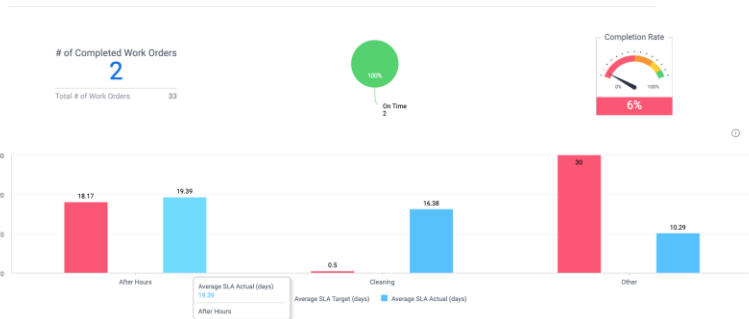

2. Click Work Order SLA Report from the drop down.

3. Click export at the top of the page to download the entire report.

4. Click on areas of the graphs to view specific data.

5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.

6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

7. Filter the report using filter categories on the right-hand side of the page.
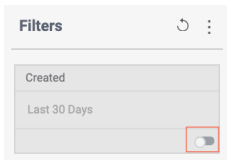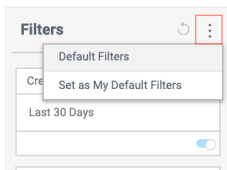
Hover at the top of a filter to click the pen icon and edit the filter.
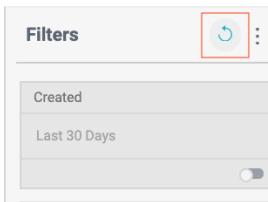

Click the toggle to disable a filter.

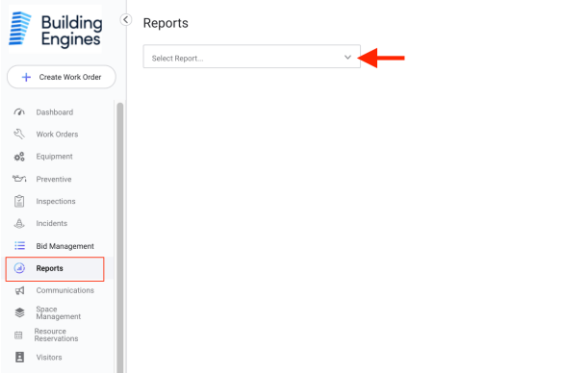Click the three dots at the top of the filters bar to set default filters.

Click the back arrow next to the dots after making any changes to revert to default filter settings.

Labor Allocation Trend Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.

2. Click Labor Allocation Trend Report from the drop down.

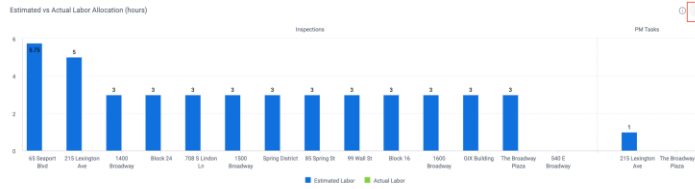3. Click export at the top of the page to download the entire report.

4. Click on areas of the graphs to view specific data.

5. Hover your cursor in the top right corners of the report graphs to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.

6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.
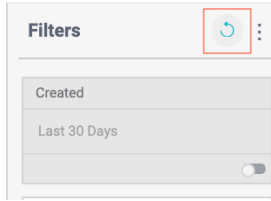

7. Filter the report using filter categories on the right-hand side of the page.

Hover at the top of a filter to click the pen icon and edit the filter.

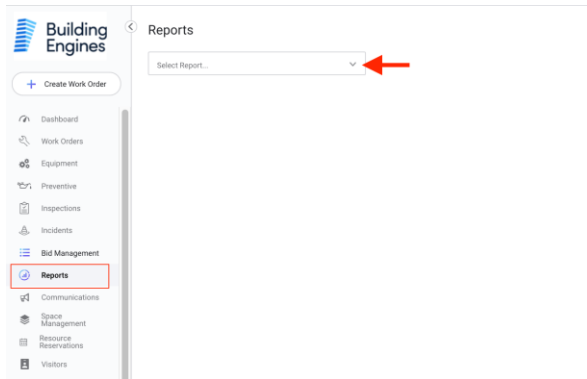Click the toggle to disable a filter.

Click the three dots at the top of the filters bar to set default filters.

Click the back arrow next to the dots after making any changes to revert to default filter settings.

Preventative Maintenance Completion Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.
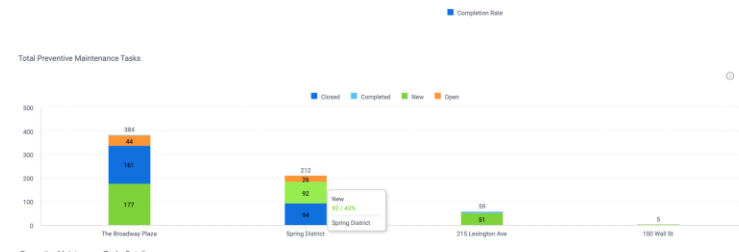

2. Click Preventative Maintenance Completion Report from the drop down.

3. Click export at the top of the page to download the entire report.

4. Click on areas of the bar graph to view specific data.

5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.

6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

7. Filter the report using filter categories on the right-hand side of the page.

Hover at the top of a filter to click the pen icon and edit the filter.

Click the toggle to disable a filter.

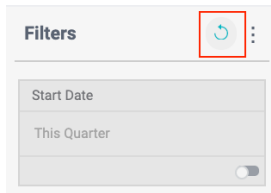Click the three dots at the top of the filters bar to set default filters.

Click the back arrow next to the dots after making any changes to revert to default filter settings.

Equipment Meter Readings Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.
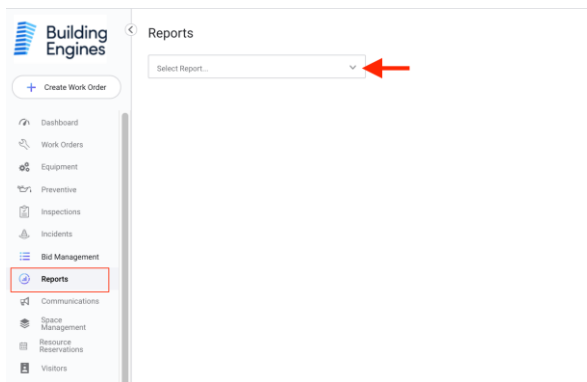
2. Click Equipment Meter Readings Report from the drop down.

3. Click export at the top of the page to download the entire report.

4. Click on areas of the graphs to view specific data.

5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.

6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

7. Filter the report using filter categories on the right-hand side of the page.

Hover at the top of a filter to click the pen icon and edit the filter.

Click the toggle to disable a filter.

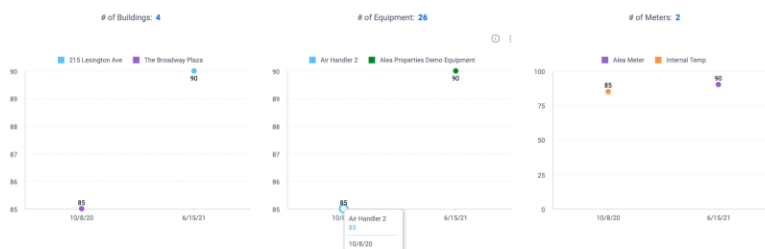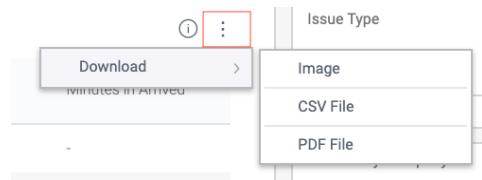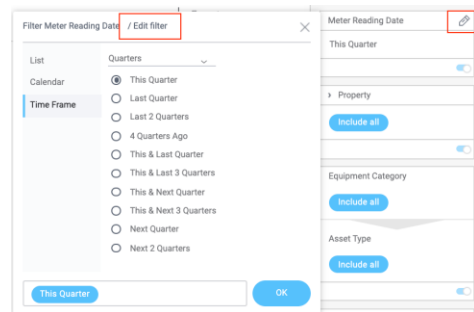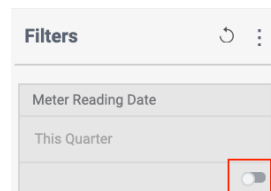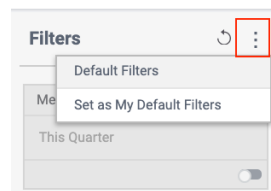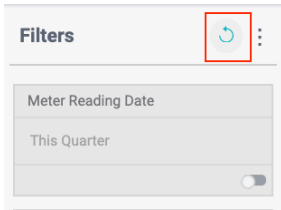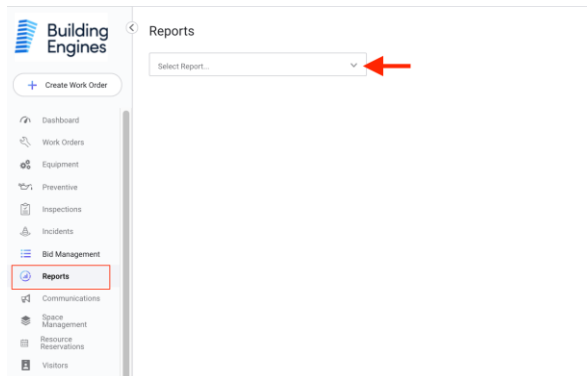Click the three dots at the top of the filters bar to set default filters.

Click the back arrow next to the dots after making any changes to revert to default filter settings.
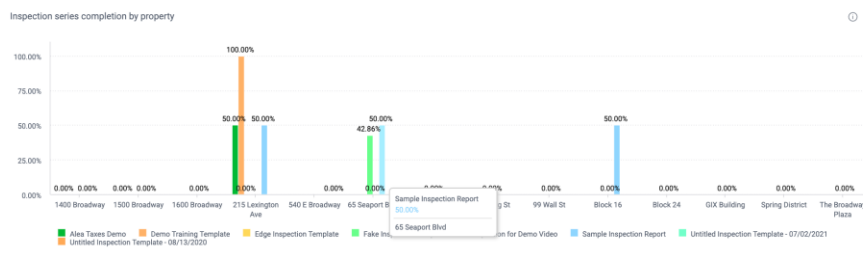
Inspection and Template Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.
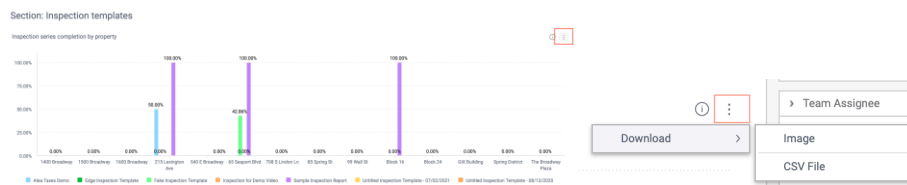

2. Click Inspection and Template Report from the drop down.

3. Click on areas of the bar graph to view specific data.

4. Hover your cursor in the top right corners of the report graphs to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.
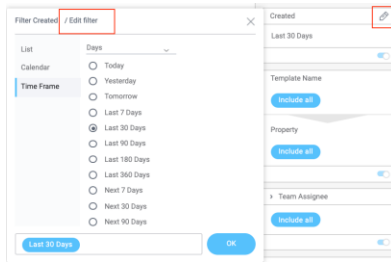

5. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.
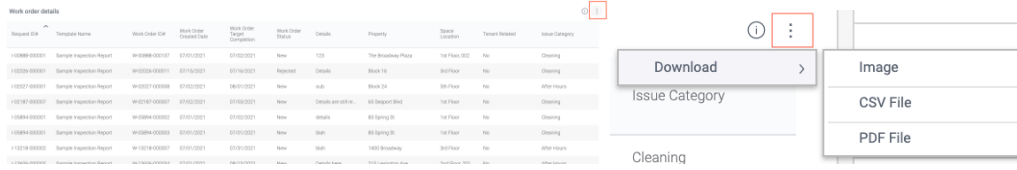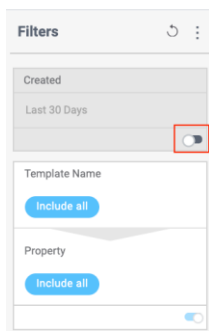
6. Filter the report using filter categories on the right-hand side of the page.
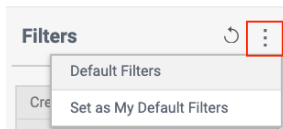
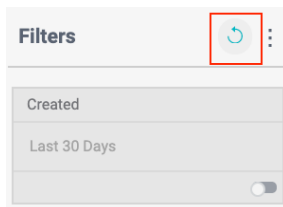Hover at the top of a filter to click the pen icon and edit the filter.

Click the toggle to disable a filter.

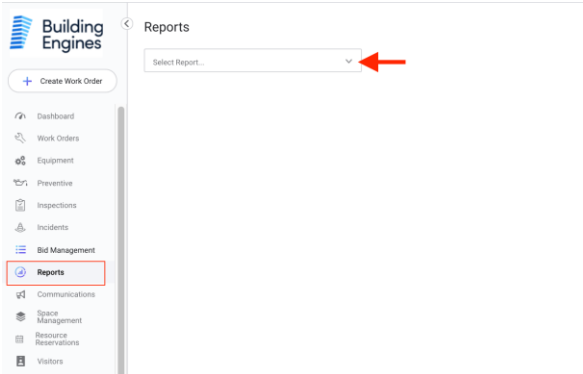Click the three dots at the top of the filters bar to set default filters.

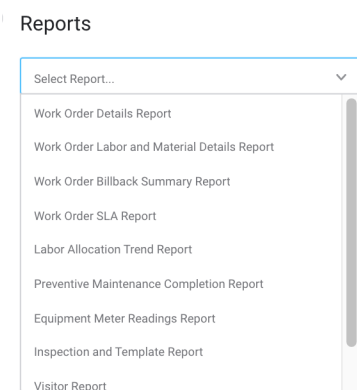Click the back arrow next to the dots after making any changes to revert to default filter settings.

How to Find Reports

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.
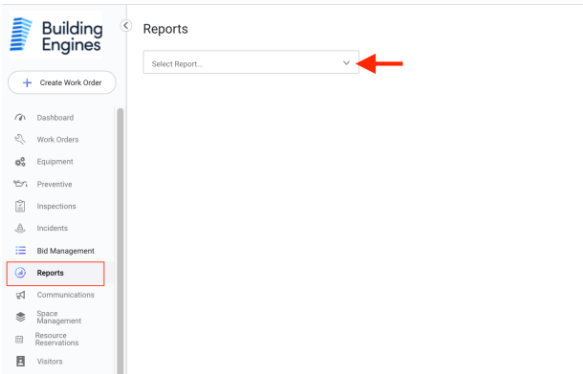
2. Use the drop down to find a report type. Click the report of your choice to open the report page.
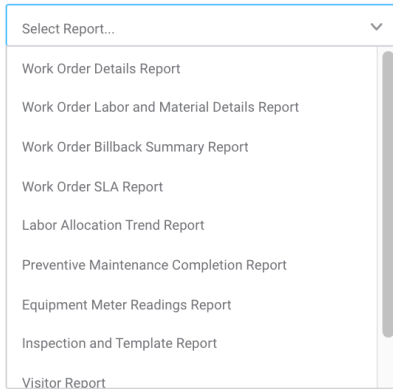

How to Use Reports (filtering)

1. Click the reports tab then use the search to find a report type of your choice. Click into the report.
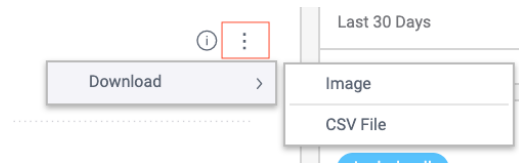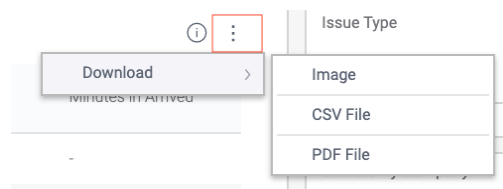
Reports

2. Within the reports page you can download the graphs and grids.

Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.
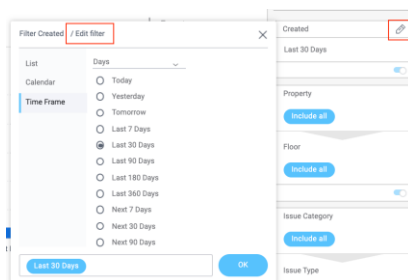

Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.
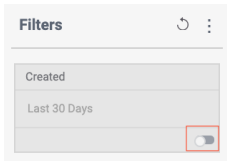

3. Click on areas of the graphs to view specific data.

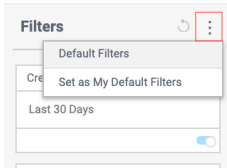4. You can filter the report using the filter categories on the right side of the page.

Hover at the top of a filter to click the pen icon and edit the filter.

Click the toggle to disable a filter.

Click the three dots at the top of the filters bar to set default filters.

Click the back arrow next to the dots after making any changes to revert to default filter settings.