Executive Reports

The **Executive Reports** feature will easily let you **consolidate multiple reports**. **Summarize** the important **information**, provide **concise analysis** and **outline conclusions** with ease.

The report functionality can be used for a wide range of report types from **claim reports** to **team audits** or even an **action report**.

I will take you through how to use the feature to create a basic report/document then you can tailor the report to your own needs.

To create a **new executive report** follow the steps below

1. Navigate to **Reporting** > **Executive Reports**.
2. Select **"New Executive Report"**.
3. In this modal enter in a **Name** for the **Report**.
4. Select the **Audits** you wish to **report on**.
5. Select **"Next"**.
6. The next screen shows the options of what to include in the report from the Audits summary section. Select which ones you wish to include.
7. Select **"Finish"**.

In the **executive report** you are able to create **multiple** different **sections/overviews** in which you are able to comprise a full **written report**, along with **links/references** to the **Audits** below.

Before you begin to edit the executive report you must switch to the edit mode, simply select the toggle at the top left.

- Use the Text editor to write your report and when needed copy the information to your written report to reference. The Text editor has a wide range of formatting options, including:
    - Text **sizes**.
    - Text **colour**.
    - **Highlight** Text.
    - **Bold**.
    - **Strike** through.
    - Insert and remove **link**.
    - **Bullet Points**
    - Text **Alignment**
    - **Line** tool
    - **Quote** formating.

You can also create a reference in the overview by following the steps below:

1. In **Edit mode** of the exec report
2. Scroll down to either an **Observation**, **Input field**, **Non-Conformance** or a

Task.
3. Select **“Copy to Overview”**.
4. Select the **Overview** you wish to **copy to**.

The references are in **blue** and **underlined**, they tell you which **Audit it came from**, the **requirement it came from** and then what the **Auditors input**. You can **click on the link in report mode** and you will be **taken to that requirement** in the report below so you are able to see the whole **requirement**.

PLEASE NOTE:

The **link will be added** to either the **position you were last typing** (where the cursor is). If the overview you have chosen to copy to is not the last edited, the link will be added to the **bottom of the relevant overview**.

You can **share** the **report** with **anyone**, including **people outside of your organization**.

1. Simply select the “**Share**” button at the top right.
2. Enter the **emails** you wish to **send the report** to.
3. Select what you wish to **include**.
4. Add a **custom message** if desired.
5. Select **“Send”**.

Executive Reports Video