

Executive Reports

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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

New Executive Report

Name:

Enter a name for your executive report...

Select one or more assessments to create your executive report:

Search:

Show 10 entries

<input type="checkbox"/>	ID	Assessment	Completed	NCs	Grade	Status
<input checked="" type="checkbox"/>	5534	Fire Safety 2019	09/May/2019	1	Non-graded	INREVIEW
<input type="checkbox"/>	5458	Fire Safety 2019 - [v6]	21/May/2019	0	Non-graded	READYTOCLOSE
<input type="checkbox"/>	5413	Health & Safety 2017	08/Apr/2019	0	Failed	READYTOCLOSE
<input type="checkbox"/>	5412	Health & Safety 2017	08/Apr/2019	0	Failed	CLOSED
<input type="checkbox"/>	5410	Fire Safety 2019	08/Apr/2019	1	Non-graded	INREVIEW
<input type="checkbox"/>	5409	Fire Safety 2019 - [v1]	08/Apr/2019	0	Non-graded	CLOSED
<input checked="" type="checkbox"/>	5408	Fire Safety 2019	08/Apr/2019	0	Non-graded	READYTOCLOSE
<input type="checkbox"/>	5407	Health & Safety 2018 - [v5]	08/Apr/2019	0	NA	CLOSED

Showing 1 to 10 of 89 entries | 2 selected

Previous 1 2 3 4 5 ... 9 Next

Cancel

→ Next

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"**.

New Executive Report

Select items to include in report overview:

Include a total of all items raised on all Assessments (total answers, images etc.)

Include a list of all Assessments used in this report

Include a summary of Scores on all Assessments

Include a breakdown of Scores on all Assessments

Include a summary of Non-Conformances raised on all Assessments

Cancel

← Previous

→ 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.

The screenshot shows the 'Example of Exec report' interface. At the top, there is a breadcrumb trail 'Example of Exec report' and a user profile 'Aaron McPoland'. Below this, there are tabs for 'REPORT' and 'REPORT SETTINGS'. A yellow box highlights the 'View Mode' and 'Edit Mode' buttons, along with a 'Saved - 05/Oct/2019, 16:00:52' status indicator. To the right, there is a search bar 'Search report...', a window control icon, and 'DOWNLOAD' and 'SHARE' buttons. The main content area displays 'Executive Summaries and Findings'.

Before you begin to edit the executive report you must switch to the edit mode, simply

select the toggle at the top left.

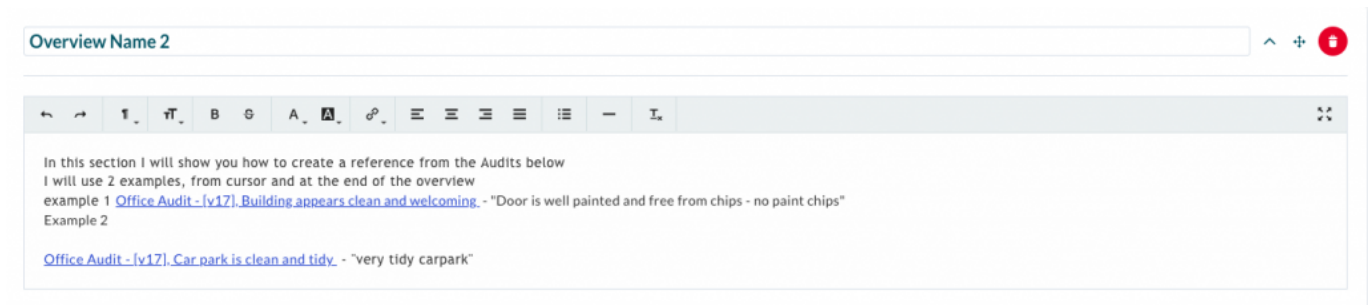
- Use the Text editor to write your report and when needed copy the information to your written report to reference. The Text editor has a wide range of formatting options, including:
 - Text **sizes**.
 - Text **colour**.
 - **Highlight** Text.
 - **Bold**.
 - **Strike** through.
 - Insert and remove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

The screenshot shows a web-based text editor titled 'Executive Overview'. At the top, there is a title bar with a search icon and a red circular icon. Below the title bar is a rich text editor toolbar with icons for undo, redo, bold, italic, text color, background color, link, unlink, list, indent, and outdent. The main text area contains the following content: 'This is an example paragraph to get you started. Please click 'edit' and start modifying this element.' followed by a yellow highlighted word 'Highlight', red text 'Text colour', bold text 'Bold', a strikethrough line 'Strike through', a blue underlined link 'Insert and remove link', a bullet point '• Bullet Points', the text 'Text alignment', a horizontal line 'Line tool', and a quote 'Quote formatting'.

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

The screenshot shows a table with two columns. The first column has a blue header '2.0 Office' with subtext 'Start: 25/May/2017, 15:00 End: 25/May/2017, 15:00 Time Taken: 0 secs'. Below this, there is a row with a blue header '2.3 No more than two people per desk' and a white cell containing 'only 1 person per desk'. To the right of this cell is a green bar with the text 'Yes'. A 'Copy to Overview' button is located to the right of the 'Yes' bar. Below the table, there is a 'Executive Overview' button and an 'Overview Name 2' input field.

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**.

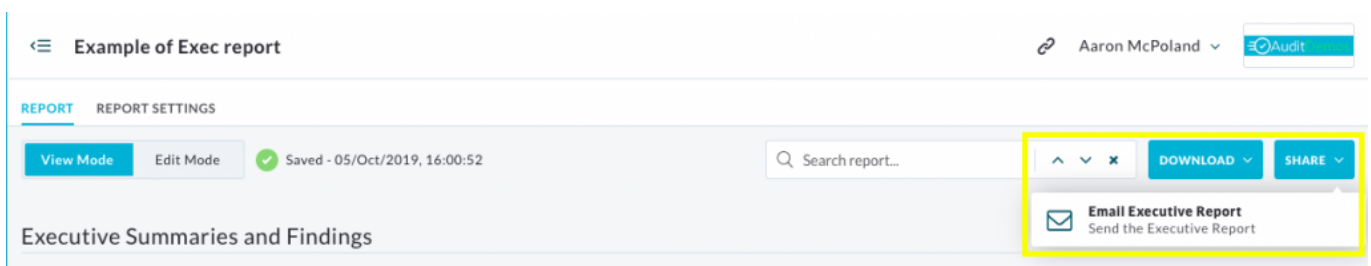


The references are in **blue** and **underlined**, they tell you which **Audit it came from**, the **requirement it came from** and then what the **Auditors input**. You can **click on the link in report mode** and you will be **taken to that requirement** in the report below so you are able to see the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

Email Executive Report

Select or enter emails to send executive report ▼

Include Executive Overview

Include Overview Name 2

Include Report Summary

Include All Assessments

INCLUDE MESSAGE:

[Cancel](#) [→ Send](#)

Executive Reports Video