Quick Start and Setup & Manage

Administrator/Manager Companion Guide

Keys to Getting Started with ClockIN – At Your Pace

By ClockIN Users Success

11-19-2020

Support@Clock.in

Welcome and Overview

Thank you for choosing ClockIN. We greatly appreciate your business and the opportunity to support your success. The ClockIN Administrator/Manager Companion Guide corresponds with the Quick Start and Setup & Manage checklists for getting started with ClockIN. Below are some tips to help you get started with the checklist items found on the Home page of your ClockIN tenant.

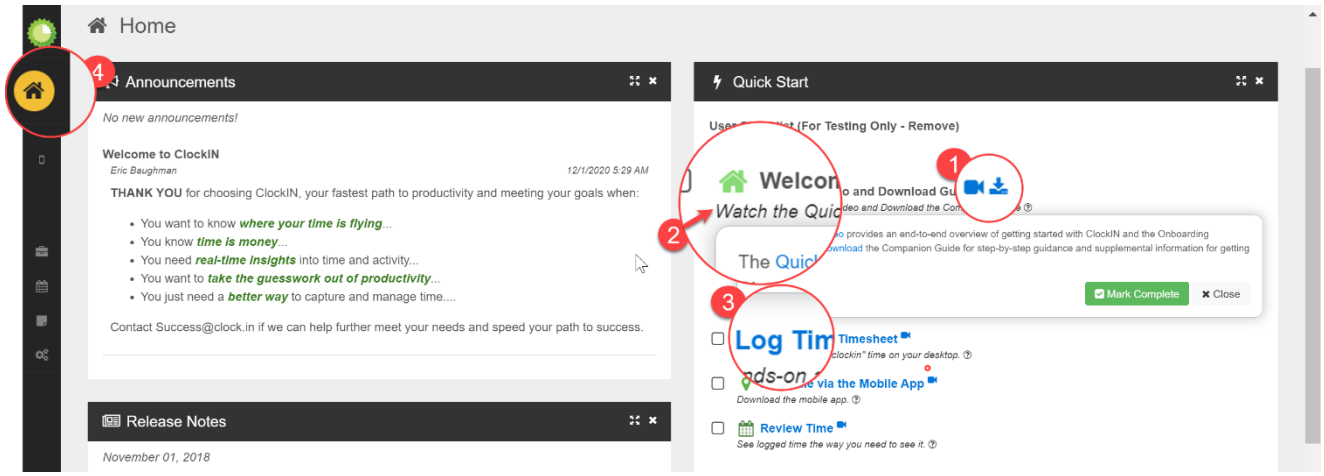


Figure 1 - Quick Tips for the Quick Start

1. **Watch Video or Download PDF** when clicking on an icon.
2. **Learn More** via the information drop-down when clicking on the subtext link or ? icon.
3. **Go Hands-On** clicking the topic link and using the step-by-step checklist instructions below.
4. **Return Home** after hands-on by clicking the Home icon and continuing with the checklist.

- **Help** – We are here to help and would love to hear from you in a variety of ways:

  Support/Chat in the ClockIN tenant to submit a request or start a conversation.

  Call us toll free at 1-833-3CLOCKN (1-833-325-6256)

  Email us at Support@Clock.in

A separate User Onboarding Guide and checklist is provided to End-Users upon setup in ClockIN. This guide is recommended for Managers and Administrators to learn the features they need to know. Contact us if you'd like an instructor facilitated session to help get you and your team jumpstarted.

We look forward to helping achieve your business goals and supporting your continued success.

ClockIN Success Team

Contents

Quick Start

☐ About ClockIN – an Introduction

ClockIN is your fastest path to productivity and meeting your goals when:

- You want to know ***where your time is flying***...
- You know ***time is money***...
- You need ***real-time insights*** into time and activity...
- You want to ***take the guesswork out of productivity***...
- You just need a ***better way*** to capture and manage time...
- And more…

Depending on your use of ClockIN, including the number of users and projects you have, it can take as little as a few minutes to get started. The key is to start experiencing the ease, power, and flexibility of the system, and then grow as you go. The first four checklist items are designed to get you experiencing the system. Customers find it useful to watch the short videos for each checklist item first, and then use the step-by-step instructions if needed. Whatever works best for you.

Once you have a basic orientation to the system, by using ClockIN via the browser and mobile app, then you will work through the Setup and Manage checklist items based on need and interest. Most of the items should take only a few minutes, but work at your own pace and upon completion of the checklists you will have a solid foundation related to what ClockIN can do, its flexibility, and the many benefits it can provide to your organization. Additional training and learning options are available by contacting Success@clock.in.

☐ Log Time via Timesheet - Go hands-on and "clockin" time on your desktop

Use Timesheets to experience how users manually enter time, guided by the in-app Help feature. “Help” is available to users within many of the applications and pages throughout the system. This is a good feature to familiarize your users with when first learning ClockIn or as a refresher.

The example below provides step-by-step instructions for familiarizing yourself with the Timesheet.

1. Click the **Log Time via Timesheet** link in the Onboarding Checklist or navigate to “Time” on the left-side menu, then
    a. Click “Timesheet”
    b. Click “Help”
2. Follow the in-app help guidance by following the instructions provided for each step.
3. Clicking “next” to proceed through the process for adding time manually via the Timesheet.

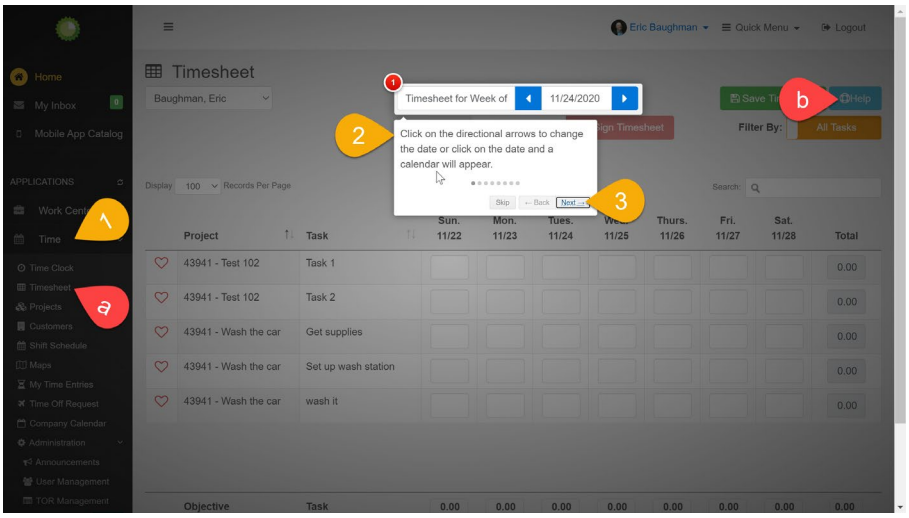


Figure 2 - Timesheet for Time Entry

☐ Log Time via the Mobile App – download the app and go hands-on

Download and/or log-in to the ClockIN mobile app, and then clock in and clock out to experience the End User process for logging time. Contact Success@clock.in for guidance on downloading the mobile app. If you have already installed the mobile app.

1. **Log In to ClockIN mobile** using your same Username and Password as the desktop.

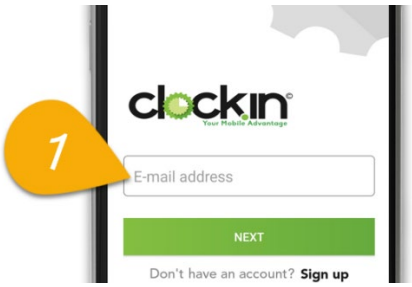


Figure 3 - Log In to Clock In

2. **Clock In** from your mobile device by clicking the "CLOCK IN" button on the default Timer Clock page, and then wait a few minutes as the system tracks time prior to Step 5.

Figure 4 - Clock In via Mobile

3. **Clock Out** from your mobile and select "Training" as the Objective, and "ClockIN Onboarding" as the Task, and then click "Save."

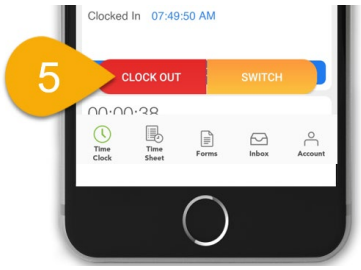


Figure 5 - Clock Out via Mobile

4. **Select Project** “ClockIN Onboarding” and then click SAVE.

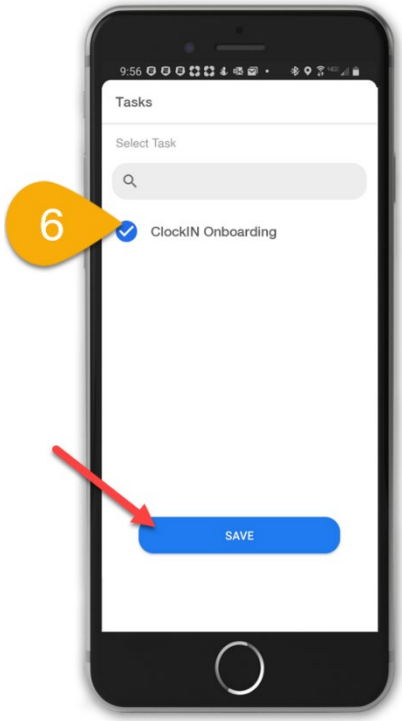


Figure 6 - Select Task and Save

☐ **Use the Timesheet** to see the end user’s alternative to the clock in/clock out feature for logging time.

1. **Select “Time Sheet”** from the menu options on the mobile app.
2. **Click the Date** for which you what to manually record time.

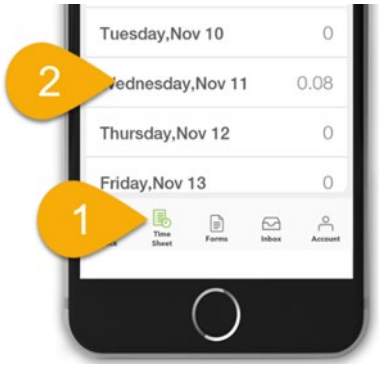


Figure 7 - Choose a Date to Add Time

3. **Click the +** in the upper right of the mobile screen.
4. **Click “Add Task”** to add the Objective (e.g. Training) and the Task (e.g. ClockIN Onboarding), and then click “Save.”

5. **Click "Clock In"** to enter the start time using the clock interface, or
6. **Click the Keyboard** icon to type in the start time.
7. **Set "Clock Out"** time repeating steps 5 & 6.
8. **Save** your Manual Time Entry

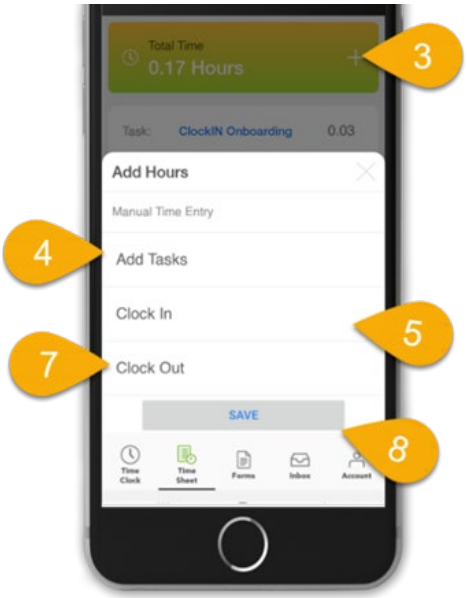


Figure 8 - Manual time Entry

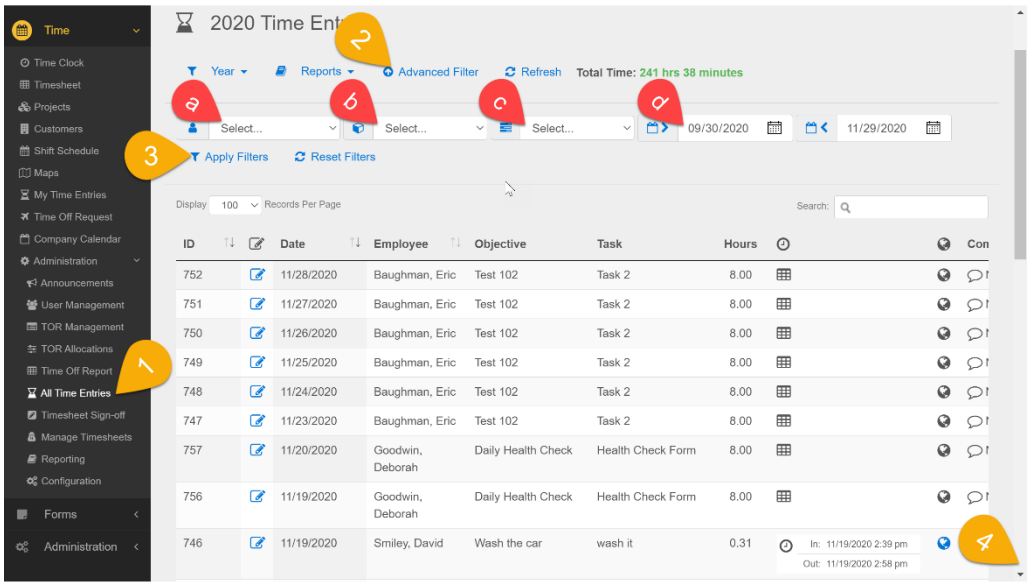
☐ Review Time – see logged time the way you need it

Use the All Time Entry page to target and review logged time based on your select criteria. Results can be exported to Excel by scrolling to the bottom of the page and clicking the "Export to Excel" option.

Then use the edit option make any needed changes to a time entry including comments. Follow the steps listed below with the corresponding annotated screen capture.

Start by using the Advanced Filter option to define the data/time entries you want to review by:

1. **Go to "All Time Entries"** via the Time Reporting link in the checklist or use the left-side menu and click "Time," then "Administration," then "All Time Entries." (see image below)
2. **Click "Advanced Filter"** to set your selection for time entries to view by the following by:
    a. Select User, and/or
    b. Project, and/or
    c. Task (time tracking item), and/or
    d. Start and End Dates (period)
3. **Click "Apply Filter"** to apply the select filter criteria. Then review the detailed results for the time entries based on the filter.
4. **Export to Excel** by scrolling to the bottom of the page and clicking the "Export to Excel" button.



If you need to edit a specific time entry, for either a "clocked" entry or "manual" timesheet entry, you can use the edit icon for the item to make the change. The instructions below first show how to edit a manual timesheet entry, then a clocked entry. A manual timesheet entry is

denoted by a calendar icon, whereas a clocked time entry is denoted by a clocked icon and also includes the “in” and “out” times.

5. **Edit a manual, Timesheet entry** by clicking the “Edit” icon and modifying the hours and/or date. Note comments <u>should always</u> be included on an edited time entry noting the reason for the change.

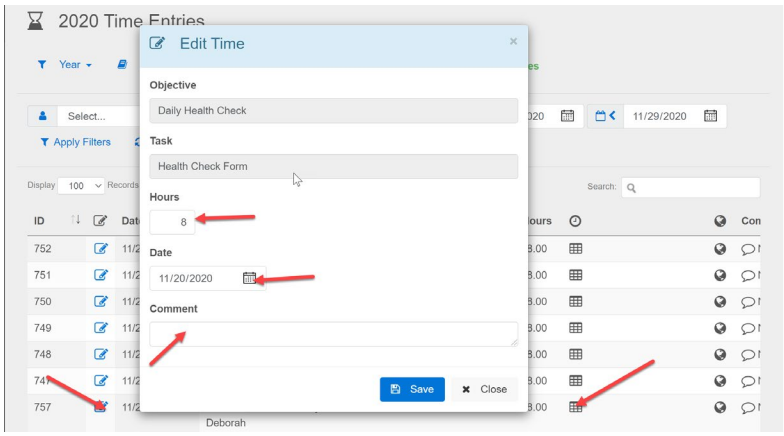


Figure 9 - Edit Timesheet Entry

6. **Edit a clocked entry** by clicking the Edit icon. Clocked entries are modified by clicking on the date field to change the date and/or time for the Clock-in or Clock-out.

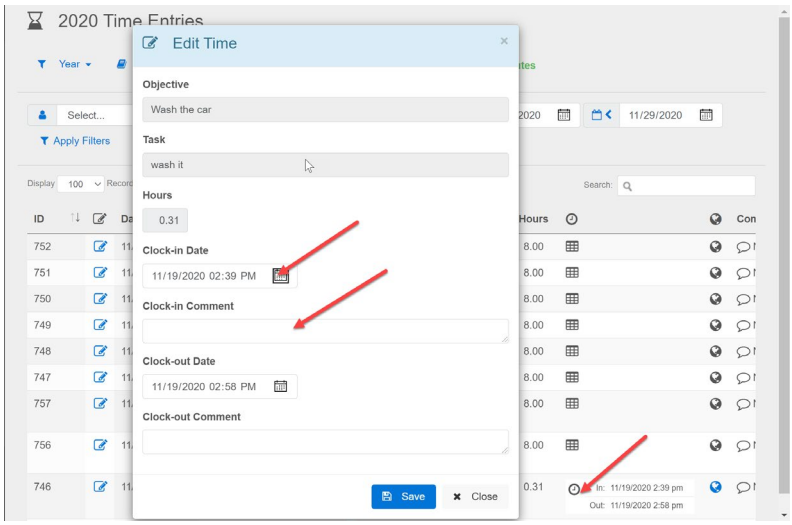


Figure 10 - Edit Clock-In Date

7. **View the "By Employee" Report** for All Time Entries, showing the total time by project for each employee for the selected period.

   a. **Select By Employee** from the Reports drop-down.

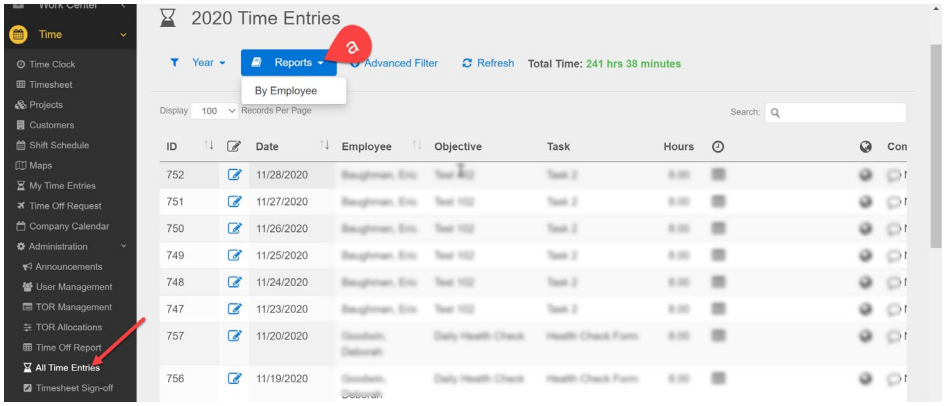


Figure 11 - Select "By Employee" Report

   b. **Review the report** results for the select period and/or Export the details.

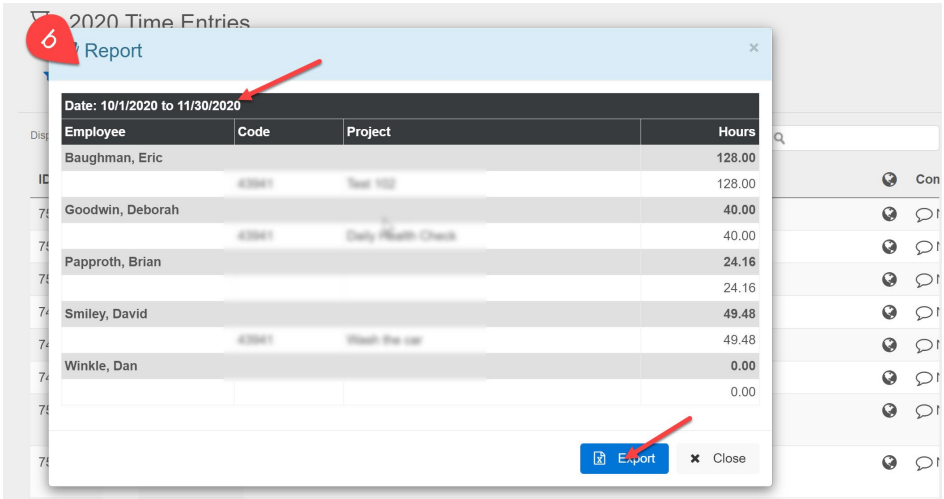


Figure 12 - By Employee Report

Setup and Manage

☐ Setup Time Periods - configure ClockIN time periods for your business

For time recording and reporting purposes, ClockIN enables its administrators to configure Time Periods based on your business timeframes (e.g. to correspond with your company pay periods). This includes the flexibility to choose:

1. **Time Range** - The range in which time is captured and reported, as:
    - Bi-Weekly
    - Bi-Monthly (1st and 15th)
    - Monthly
    - Weekly
2. **Week Start Day** - The day of the week the time period should start:
    - Sunday
    - Monday
    - Tuesday
    - Wednesday
    - Thursday
    - Friday
    - Saturday

Following are the steps for setting up Time Periods:

1. Click the **Setup Time Tracking** link in the Onboarding Checklist or navigate to "Time," then
    a. Click "Administration"
    b. Click "Configuration"
    c. Click "Time Periods"
2. Select your desired "Time Range" from the drop-down.
3. Select your "Week Start Date" from the drop-down.
4. Confirm your selection via the "Time Period Preview" with the calendar examples provided.
5. Scroll and Click "Save" at the bottom of the screen.

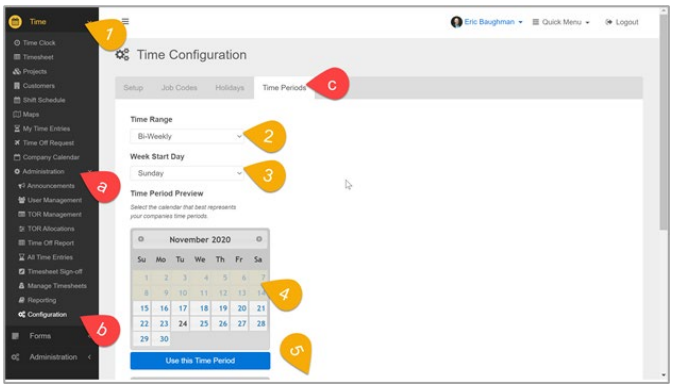


Figure 13 - Time Periods Configuration

☐ Setup New Users – and manage users as you go…

The wizard to "Setup a new User" provides a quick way to add new users to ClockIN. To provide new users with the appropriate access and permission levels for the various features there are choices throughout the setup process. However, ClockIN has streamlined the process by including default settings based on common, baseline setups. As you gain more familiarity with the system you can always change settings as needed under the User Management.

Start by navigating to Wizard via the "Setup New Users" checklist link or scrolling to the bottom left of the Home page to the Wizards section. Once in the Wizard, follow the 4 step process to set up new users. Guidance for each step is provided at the top of dialogue box for each step.

TIP: Start adding any managers

1. **Complete the Required fields for Step 1**, selecting the option for Manager and/or Administrator if the user has that role, and then click Next.

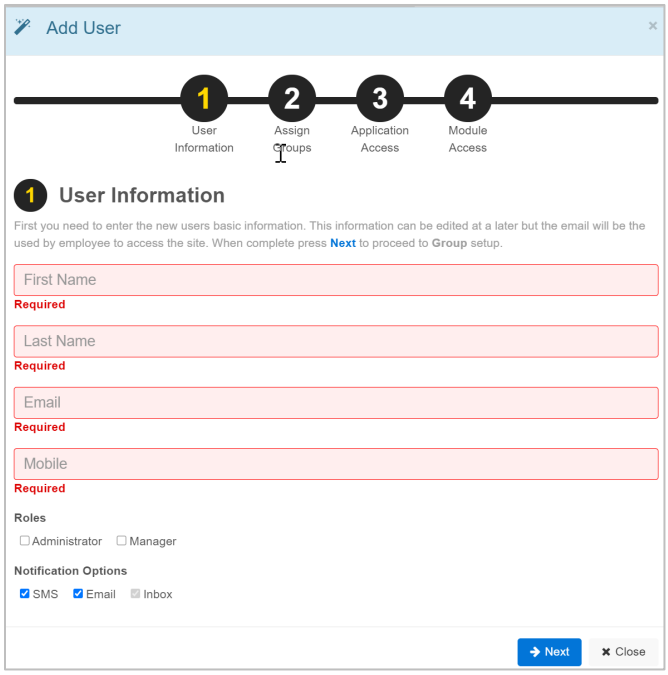


Figure 14 - Step 1 User Information

2. **Introduction to Groups, then click "Next."** Groups provide added flexibility as you grow, however, to start use the Default group already selected and click Next.

- **Note:** You will learn about creating and applying groups in later training.

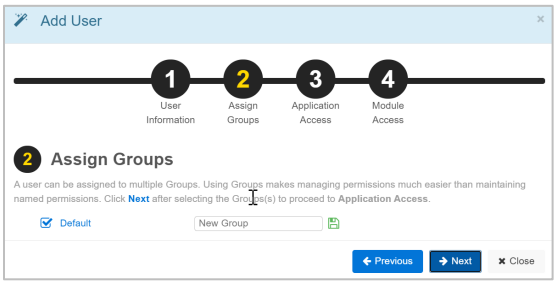


Figure 15 - Step 2 Assign Groups

3. **Remove Applications** by unchecking any applications that you do not want the new user to have access. If the new user is an Administrator, check Administration. Click Next.

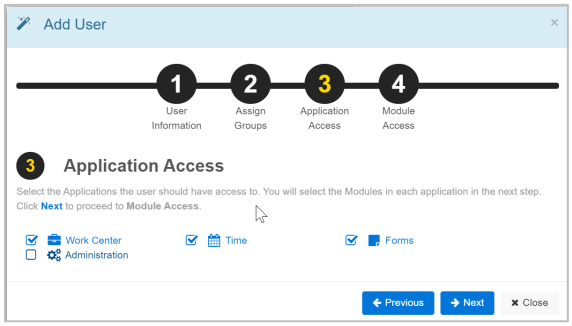


Figure 16 - Step 3 Application Access

4. **Choose Access to Modules** by reviewing the associated modules for each application that users have access by default. Uncheck a selected module to remove the new users access. Check the Administration box for the appropriate module(s) if the new user is an Administrator. Then click Submit.

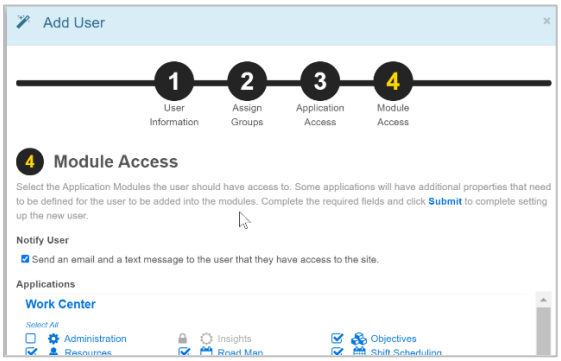


Figure 17 – Step 4

☐ Setup Managers – enable managers to track and manage time

Learn how to configure ClockIN User Management to enable Managers to review, add, and update time entries for users under their responsibility.

> ***Tip***: Schedule a kick-off session with Managers to walk through the Quick Start, Setup & Manage, and Companion Guide.

Start by navigating to User Management via the "Setup Managers" checklist link or using the left-side menu under the Time category and Administration option. From the User Management page you will first select the users for who the manager can log time.

1. **Edit the desired Manager** by clicking the edit icon next to the manager's name. If the user is not listed, go to the next checklist item "Setup New Users," and then return to this step.

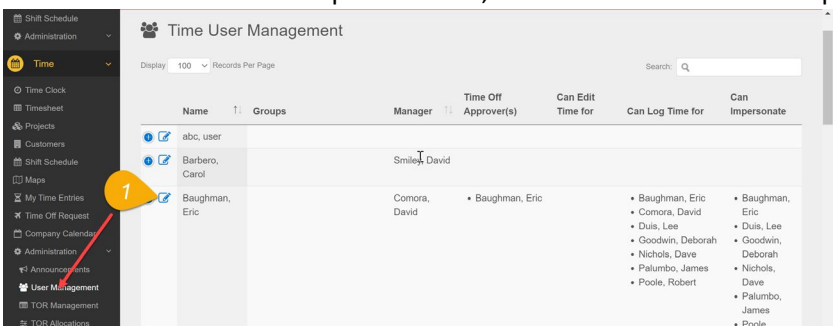


Figure 18 - Edit User

2. **Click "Log Time For…"** tab to add the users for which you'd like the manager to be able to log time for.
3. **Select Employee** from the drop-down list and click to employee to add them to the "Users Can Log Time For" option.
4. **Click Save** to apply select employees for which the manager can log time for. Upon saving, the manager will see those employees available in the Timesheet, Employee drop-down option per the previous checklist item "Manage Time."
5. **Repeat the above steps** by clicking the "Edit Time For…" tab, and then "TOR Approvers" tab (for Time off Request) to configure those options. **Tip**: Set yourself to approve your TOR requests to experience the request lifecycle in the later checklist item.

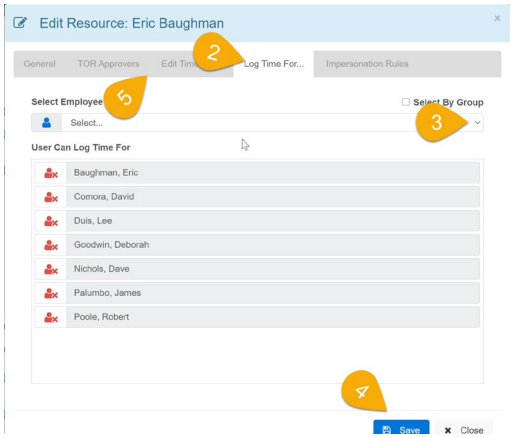


Figure 19 - Edit Resource

☐ Create New Projects and Tasks – track work and time the way you need to

"Projects" is a familiar term adopted by ClockIN, however you can use projects is a variety of ways to meet your specific business needs and use cases. You can use Projects in a traditional sense, as a collection of managed tasks within a specific timeframe (start and end date), or you can think of a project more generically as an initiative, reporting entity, work activity, etc. that you want to track (e.g. time or status)– with or without associated tasks.

ClockIN has created several example Projects that are used in onboarding new users, and may meet some of your needs moving forward. Tasks associated with these projects are available in user's Time Clocks and Timesheets to log time against:

- **General** - A "project" designed as a reporting entity, or bucket, to track time such as employee time-off. Tasks within the General project include:
  - Vacation
  - Holiday
  - Sick Leave
  - Jury Duty

  Recording time against these "tasks" helps provide a complete picture of activity and performance, removing questions in reporting when users are away from work and not otherwise reporting time against work activities.
- **Standard** – An example project based on Project Management Institute's (PMI) 5 phases of Project Management, with tasks to record time for:
  - Conception and Initiation
  - Planning
  - Execution
  - Performance/Monitoring
  - Close
- **Simple** - A standalone project with no detail tasks, however including a default task of a "simple" task for time or status tracking.

As you get rolling with ClockIN you will need to create new projects or add tasks to projects (e.g. to track time), therefore the Companion Guide provides step-by-step instructions on adding tasks and projects.

☐ Add Tasks

1. **Go to the Projects** page by clicking the **Create New Projects and Tasks** link in the Onboarding Checklist or navigate to "Time" on the left-side menu, and then "Projects."
2. **Click on the "General" project** to select it to add a task under the "Details" tab.
3. **Click "Add a new task"** link under the Tasks listing.
4. **Complete the details** with "Bereavement" as the title and leave estimated time and actual time blank.
5. **Click the SAVE ICON** for the new task.
6. **Click Update Project** button to close the window.

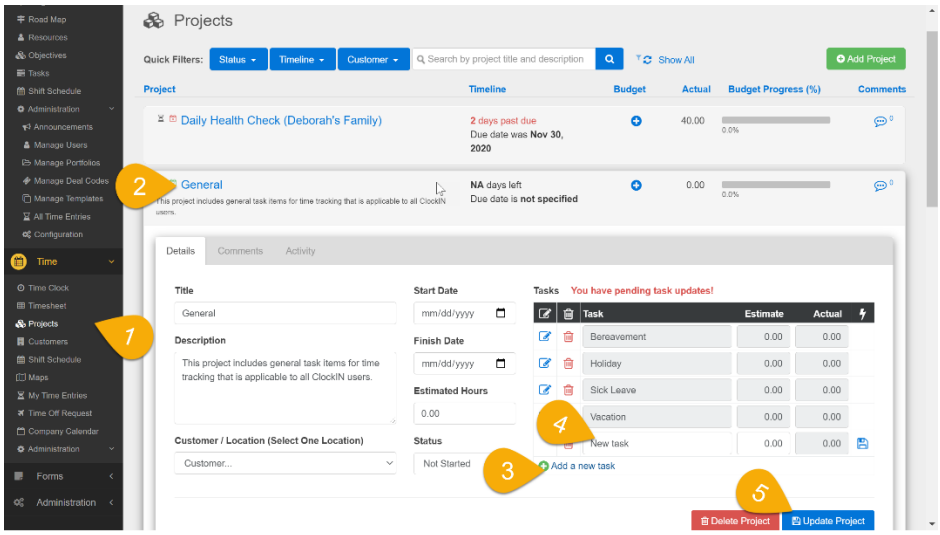


Figure 20 - Add New Task

☐ Add Projects

Go to the Projects page by clicking the **Create New Time Tracking Tasks** link in the Checklist or navigate to "Time" on the left-side menu, and then "Projects." Add project(s) specific to your organization's needs:

1. **Click the Add Project** button in the top right of the screen
2. **Add a Title** for the project.
3. **Add a Description**.
4. **Choose a Customer** if needed by selecting from the drop-down or clicking the "Add Customer" link under the Customer field.
5. **Add a Start Date and End Date**. Note that while this is optional, adding a Start Date and End Date (even if they are estimates) will add the Project to the Roadmap – providing a visual of all projects against a timeline. The Roadmap is covered in a later checklist item.
6. **Click Next** to define how the project will be used.

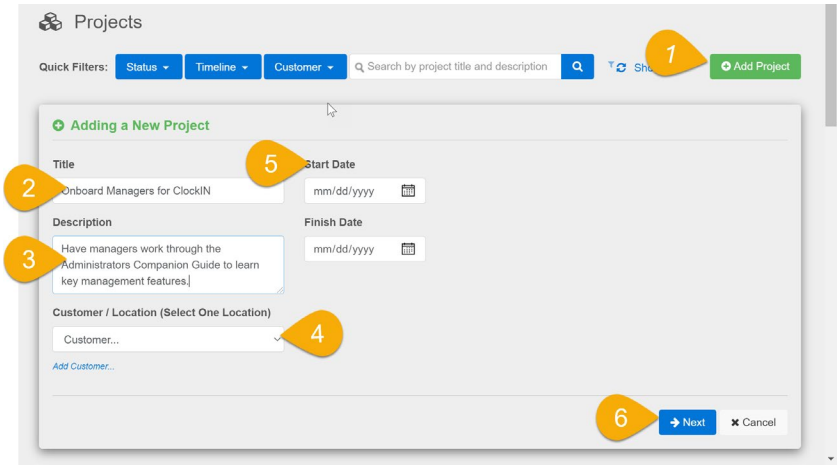


Figure 21 - Add New Project Wizard (Page 1)

7. **Choose how the project will be used** by:
    a. Select "I will not need to tack unique tasks," meaning that you do not need to create detailed tasks, however a default task will be created based on the Project Name and show on the timesheet and available when clocking time (Note you can always add unique tasks later), **or**
    b. Select "I will need to use unique tasks for time keeping and scheduling," which allows detailed tasks to be created and used for time tracking.

8. **Click "Next"**

Figure 22 - Add New Project Wizard (Page 2)

9. Based on the previous selection:
    a. **Add "Estimated Hours"** and click "Create Project"

Figure 23 - Add New Project Wizard (Page 3a)

    b. **Add Task**(s), as necessary, and click "Create Project"

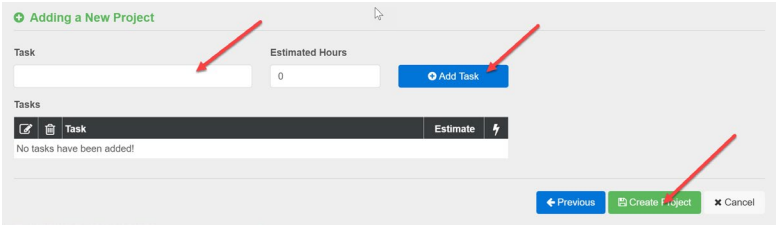


Figure 24 - Add New Project Wizard (Page 3b)

NOTE: When creating tasks if the follow a specific sequence or order, use numbering (e.g. 1. Planning), otherwise tasks are ordered alphabetically in the timesheet and views.

☐ Manage Time – insights into who, what, where, and how much

See the logged time for a select employee, for a select period, and add time for them if needed. Then go to the insights page and use the in-app help to guide you on the options for seeing pre-configured views for additional insights into time related to projects.

Start by navigating to the Timesheet option via the "Manage Time" checklist link or using the left-side menu. Once in the timesheet:

1. **Select the desired employee** from the drop-down and then the desired period using the date options. Note the available employees is based on configuration done in User Management covered in the next checklist item. The default employee is always based on the logged-in user.
2. **Log time** for the employee if desired (See previous checklist item "Log Time via Timesheet").
3. **Toggle the Filter By** option to Time Logged to see only those projects and tasks that have time entered for the select period.

    a. **View, Add, or Update Comments** by clicking in the desired cell and selecting "Comment."

    b. **Review Total Time Logged** by day, project, or period to understand and/or validate totals based on actuals or management expectations.

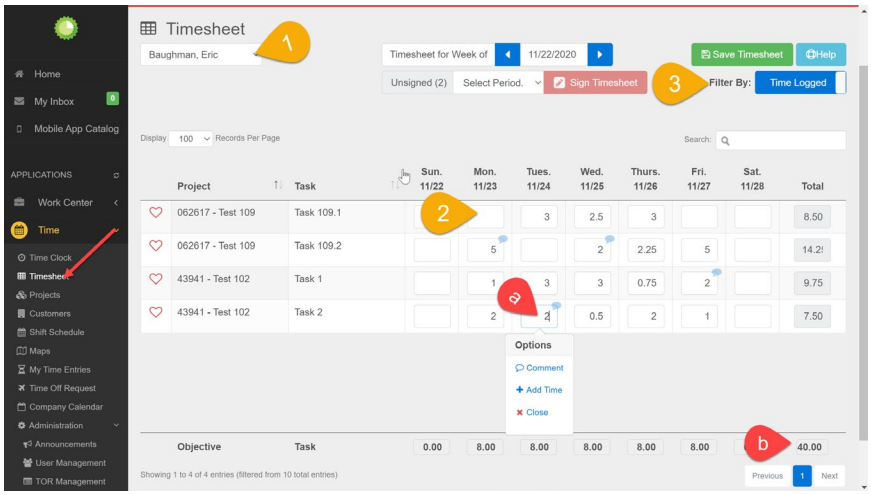


Figure 25 - Manage Timesheet

Navigate to the Insights page via the left-side navigation under the Work Center section. Then use the interactive in-app help to guide you through the choices and process for targeting pre-configured views to manage time, including: Time by Project, Overdue Tasks, Project Trends, and more…

- ☐ **NOTE**: Insights will come to life as you add projects and log time against projects, therefore this initial walk-through is designed for general awareness regarding management insights into the data, progress, and trends.

1. **Click the Help icon** to enable the in-app help guidance.
2. **Follow the in-app help** instruction and select the desired configurations.

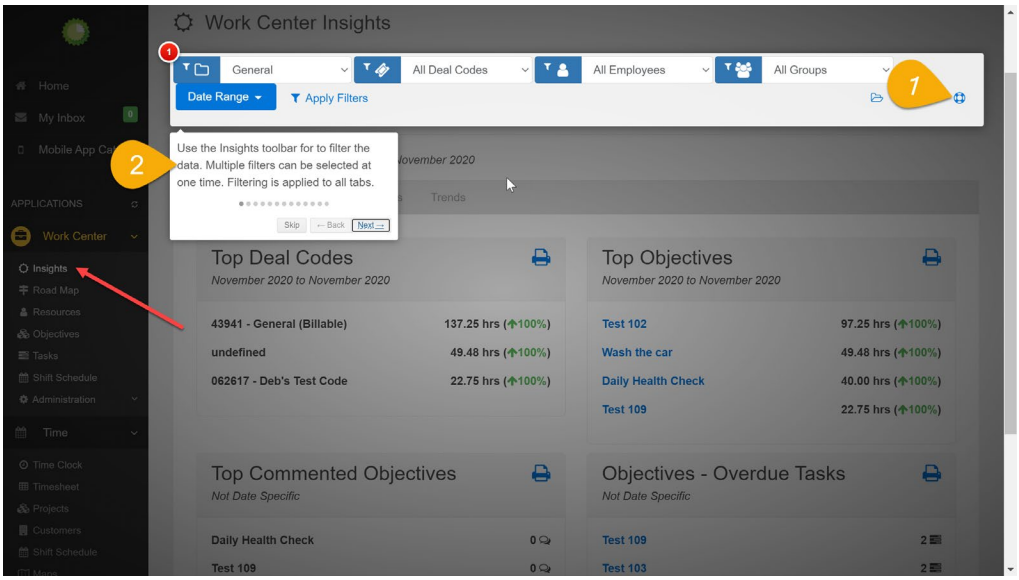


Figure 26 - In-App Help to Learn About Insights

☐ Setup Time Off Request Allocations – allocate available time off for employees

Setup your allocations for employee time off (e.g. Vacation, Sick, Carry Over, etc.) using the TOR Allocation feature and in-app guidance from Help.

Start by navigating to TOR Allocations via the "Setup Time Off Request Allocations" checklist link or using the left-side menu under the Time option and Administration. From the TOR Allocation page you will:

1. **Click "Help"** button at the top right of the page to enable in-app guidance on setting up new allocations, or if you clicked the link via the Checklist go to step 2.
2. **Follow the steps** via the in-app help to setup allocations for select users. **Tip**: Setup your time off allocations to experience the lifecycle of the Time Off Request system in the next checklist item.

NOTE: All new users are set up with

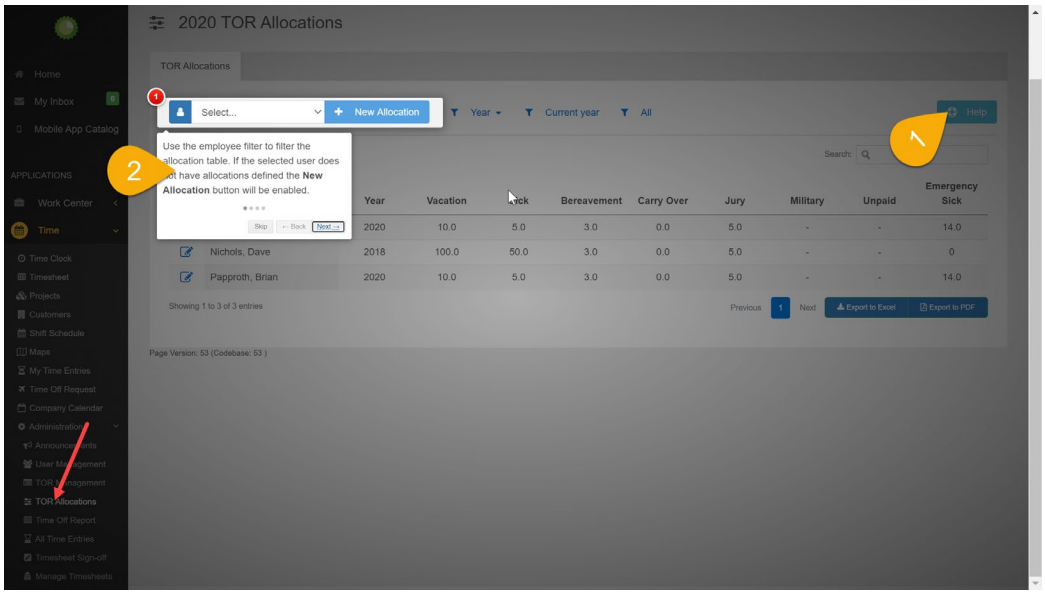


Figure 27 - Set Up Time Off Request (TOR) Allocations

☐ Submit and Approve a Time Off Request – experience the TOR lifecycle

Submit a request using the Time Off Request for yourself as a test. Then, go to the Inbox and experience the approval. Finally, review the Time Off Report.

> **Note** that you will need to be an "approver" for your requests in order to see the notification and complete the approval step below. If you did not set yourself up to approve your own TOR requests, please follow the instructions under the previous checklist item "Setup Managers."

Start by navigating to Time off Requests via the "Submit and Approve a Time Off Request" checklist link or using the left-side menu under the Time option and then Time Off Request. From the Time Off Request page you will:

1. **Click "New Request"** button at the top left of the page
2. **Complete Required Fields** in the form for a request (e.g. for vacation).
3. **Click "Submit"** to submit your test request.

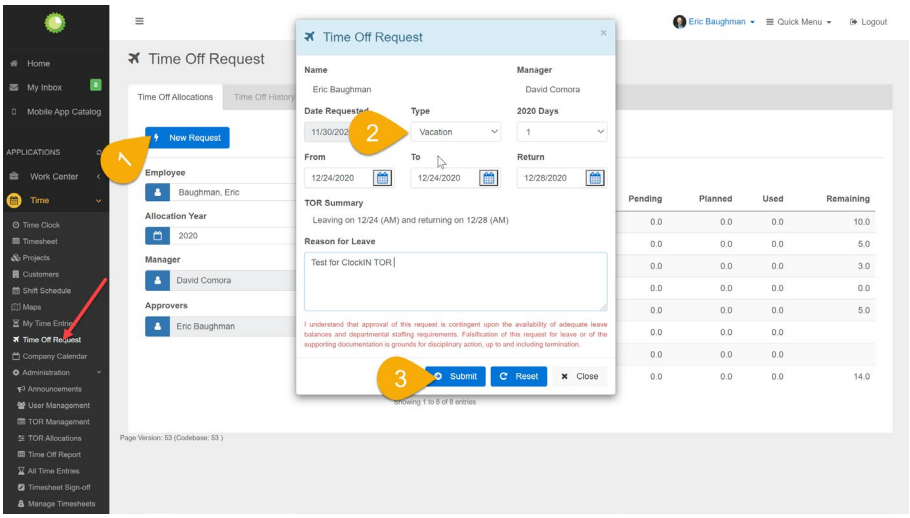


Figure 28 – Create a New Time Off Request

Approve or Disapprove a Requests via your ClockIN "My Inbox" (see annotation steps in the Figure on the following page):

1. **Click My Inbox** in the left-side navigation.
2. **Open the request** by clicking the envelope icon for the request.
3. **Review Request Details** to understand the request.
4. **Approve or disapprove** the request by clicking Manager Approval to expand the available options and selecting the desired action, including Comments.
5. **Submit** the approval/disapproval by clicking the "Submit" button. The Requestor will receive an email confirmation with the approval/disapproval details including any comments.

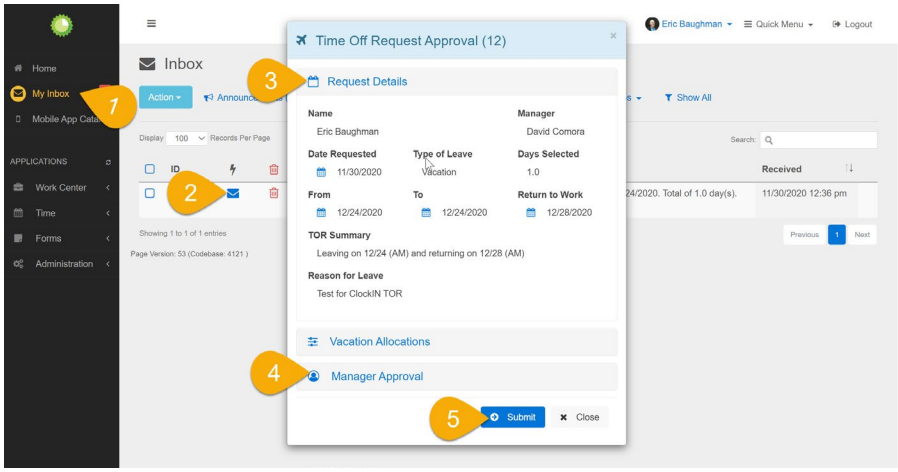


Figure 29 - Approve or Disapprove a Request

Note: The Inbox and approval screen has been optimized for viewing on a mobile browser. See Request Details and access the Manager Approval options by clicking on the link provided in the notification email, then logging in to ClockIN.

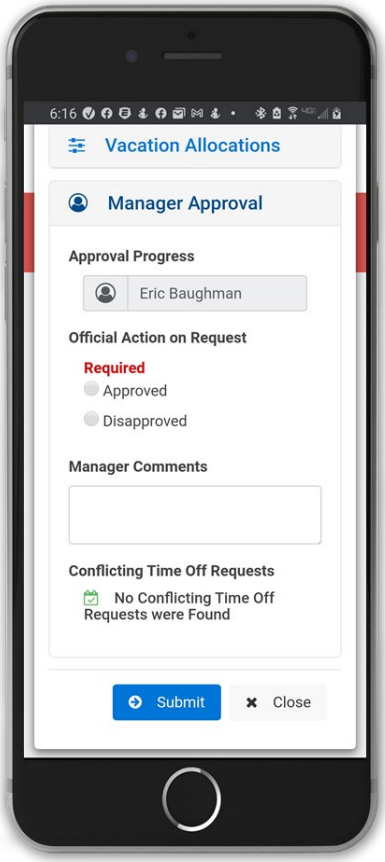


Figure 30 - Mobile Approval Example

Last, view the various reports and management views including TOR Management Requests and Time Off Report under the Time menu category and Administration option. You will find under TOR Management the approval made in the previous step, and as requests are made, pending, and approved you can see their status and allocations under Time Off Report.

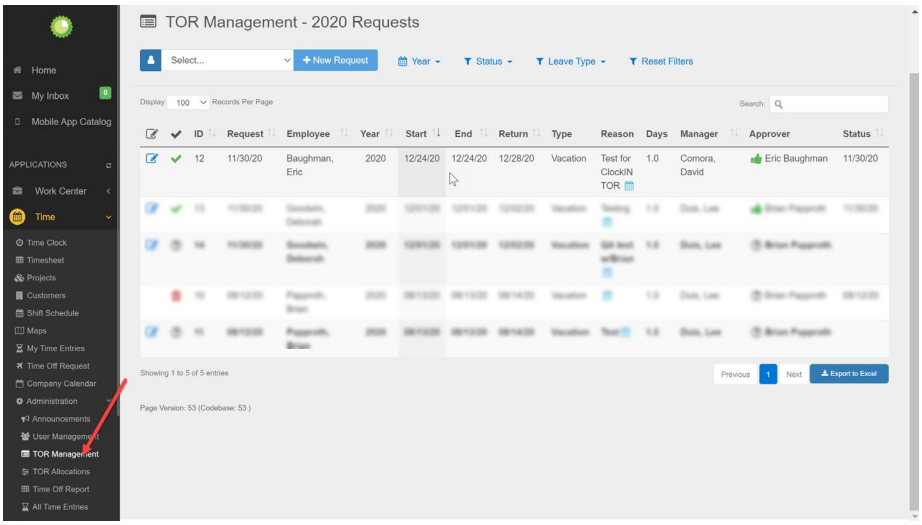


Figure 31 - TOR Management Example

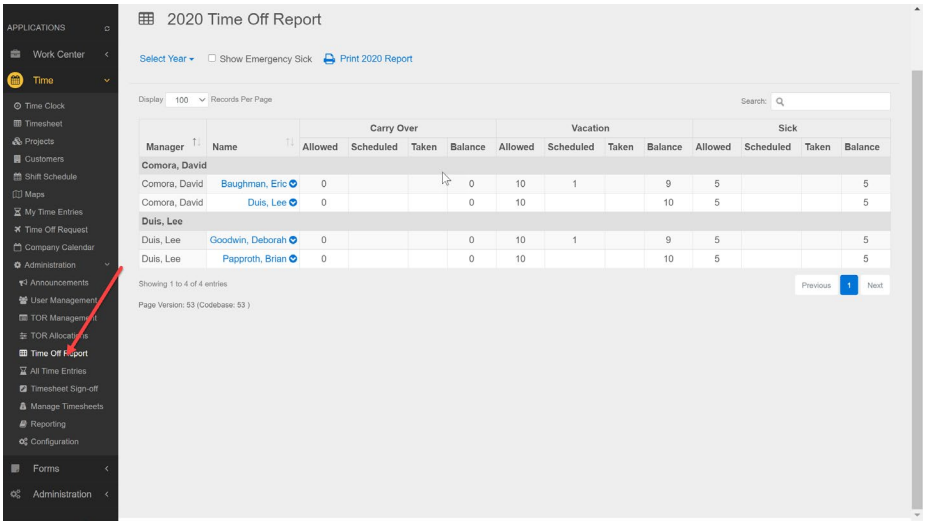


Figure 32 - Time Off Request Example

☐ Create and View and Announcement – targeted employee communication

The Announcements feature from ClockIN provides a powerful, flexible means of communication with all ClockIN members/employees or a targeted subset. It is both powerful and flexible because you can choose:

- **Where** to send the message: SMS, Email, ClockIN Inbox, or all three.
- **How** to send the message: Standard, Important, or Acknowledgement Required.
- **When** to send the message: Immediately or pick a Publish Date.
- **Who** to send the message to: All (Default Group) or Specific Group(s).
- **What** to include in the message: Rich Formatted Text and/or Attachments.

Learn how to create and send a new announcement, then see how it appears on the Home page of ClockIN, in your SMS and email.

Start with creating a new announcement by navigating to Announcements via the "Create and View Announcement" checklist link or using the left-side menu option under Work Center and then Administration. From the Announcements page:

1. **Click the Help** indicator next to each column to learn about its purpose and complete the information.
    - **Note:** If you do not see the Help indicator click the "Help" button at the bottom.
2. **Click the Details tabs** to see other configuration option that are available using the Help.
    - **Note:** Attachments can be added after the announcement is submitted.
3. **For Group, select "Default"** from the drop-down list (2nd Figure shown below)
    - **Note:** The "Default" group is all the current ClockIN users for your organization.
4. **Click "Submit"** to send your announcement.

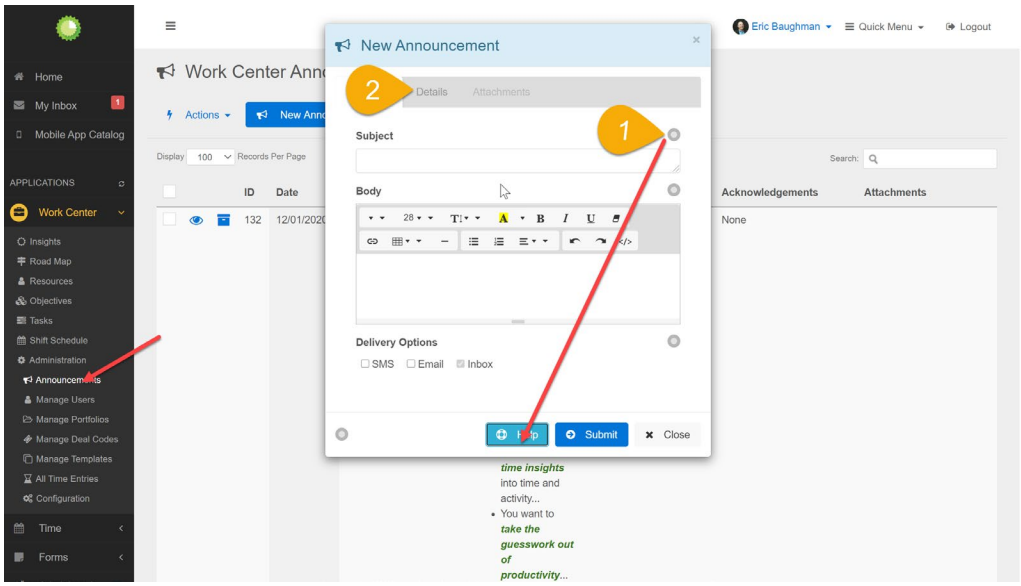


Figure 33 - Compose Message with "Help"

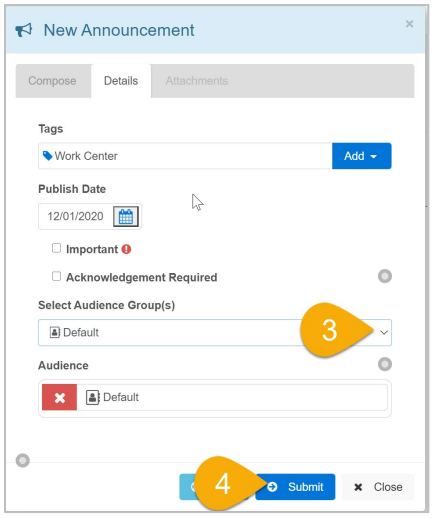


Figure 34 - Select Group(s) and Submit

View your announcement by navigating to the Home Page and Inbox.

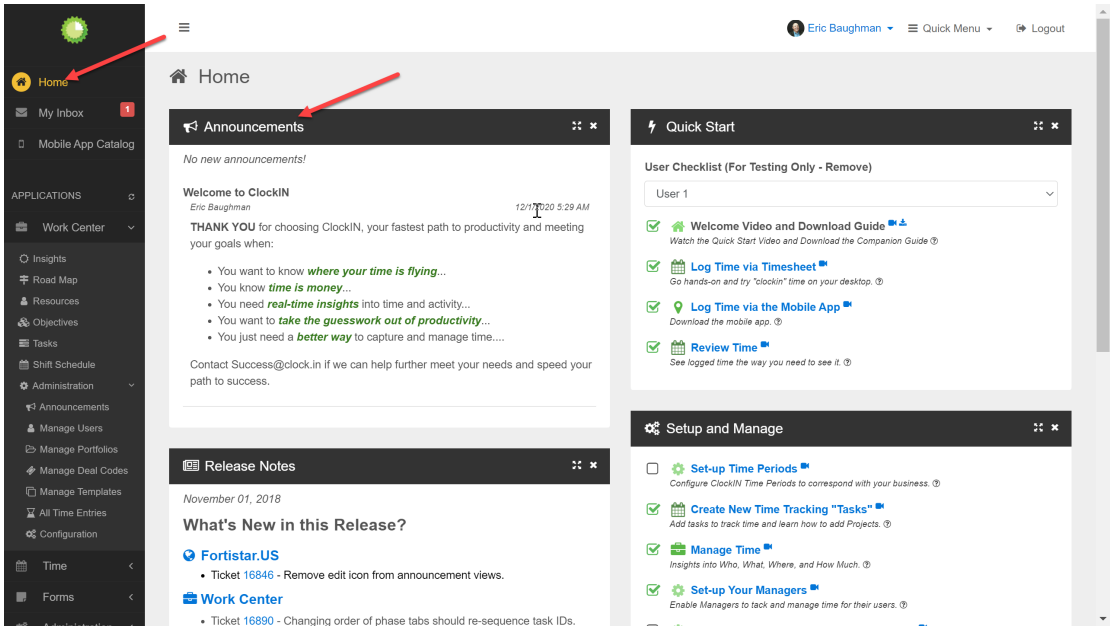


Figure 35 - Announcement Example (Home Page)

☐ View the Roadmap – time and planning

The Roadmap provides a visual, timeline style view of all projects that have a start and end date, painting a holistic picture of projects based on time. The roadmap helps facilitate planning decisions when balancing projects, time, and resources.

If you have not completed the checklist item "Create New Projects and Tasks" please do so, and add project start and end dates so that you will see projects appear in the Roadmap. In addition, trying changing project statuses to see how they are reflected in timeline.

Once you have projects with dates, follow the steps below to experience the Roadmap.

1. **Go to the Roadmap** via the checklist item link or from the left-size menu by expanding the Work Center category and then click Roadmap.
2. **Change the calendar views** by clicking Month and then Week in the upper right to see the timeline change.
3. **See Project Details** by hovering over a timeline bar for a select project.
    - **NOTE**: the system provides color codes and KPIs for visual indicators and text based on project performance (e.g. past due, or coming due) and priority. The example below shows the project in orange and notes "Due within 7 days."
4. **Modify the Roadmap** view by expanding the Milestone Details Panel and selecting or deselecting status. Click "Apply Filter" upon making changes.

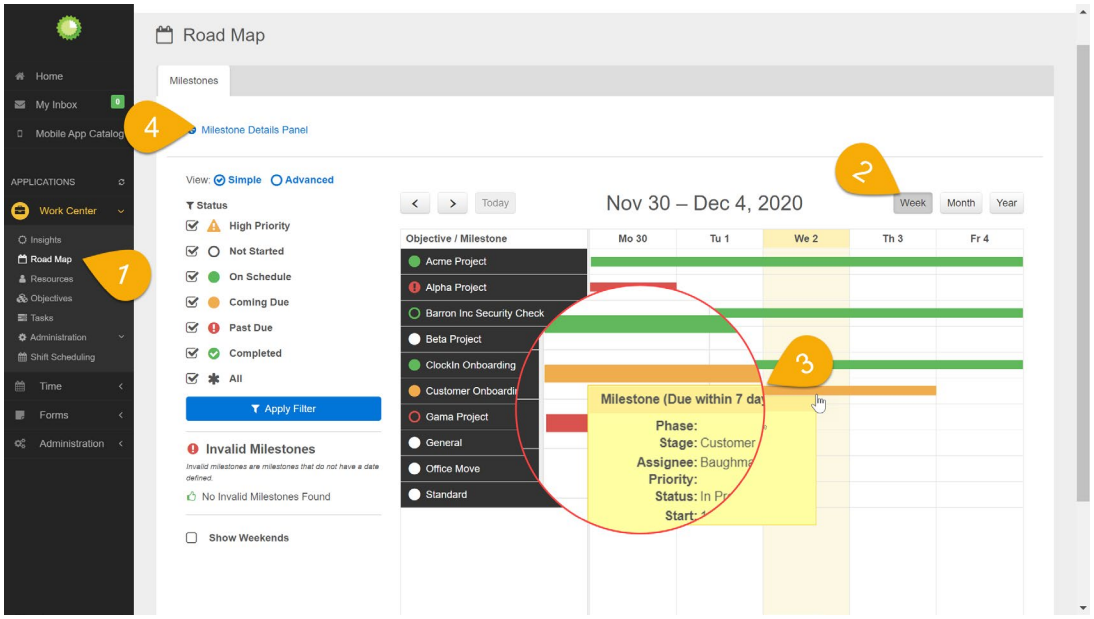


Figure 36 - Working with the Roadmap

☐ Setup a Shift Schedule – visually plan and adjust schedules

With ClockIN you can layout shifts in a calendar style display to visually see and adjust work schedules. Experience the easy "drag-drop and configure" Shift Schedule to add employees to dates and times for shifts and simply move things around to get it just right.

The Shift Schedule is purely for planning purposes and is not tied to tasks and assignments. Shifts are added by first clicking on a calendar date and time, and then completing the form to add a resource. A single shift supports multiple resources, and resources can be moved via drag-and-drop to another date and time or changed. Note that users need to be created (see the Set Up Users checklist item) and projects (See Add Projects checklist item) to reflect your resources and projects.

☐ Add a Shift Schedule

Experience the shift schedule by clicking on the Setup a Shift Schedule checklist item from the Home page or use the left-side menu Time and then Shift Schedule.

1. **Click a date on the Shift Schedule** for the desired resource (Resource Column).
   Note: A dialogue box opens assigning the select resource and requiring additional information.
2. **Complete the Add Shift Schedule** form, and add more than one resources to the sift.
3. **Click SAVE**.

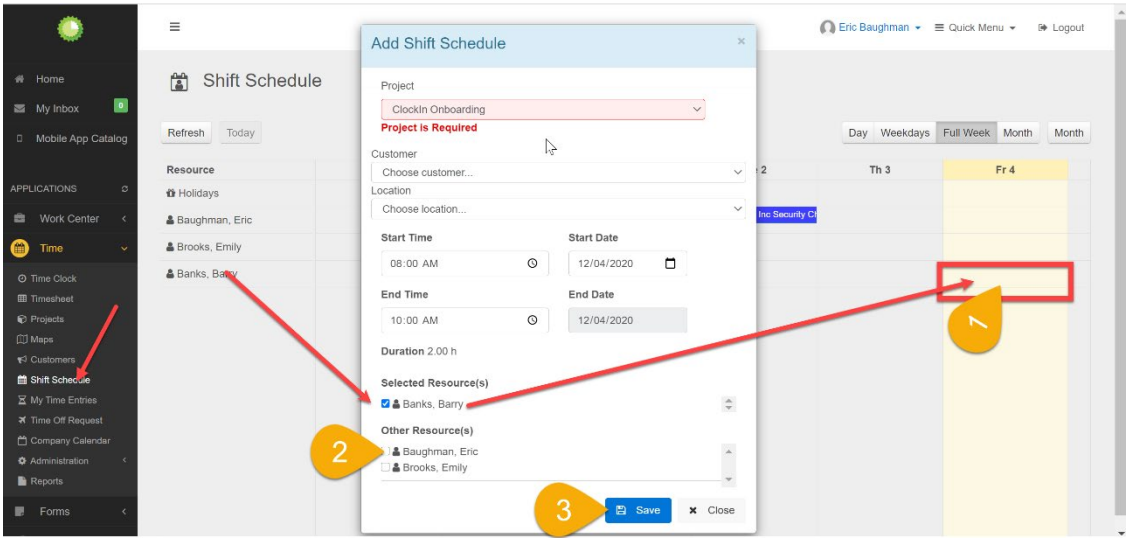


Figure 37 - Add Shift Schedule

4. **View the schedule** to see the date cells highlighted for the multiple resources you selected for the shift (you will see how all resources are adjusted if you choose to change the date in the next step).

☐ Edit a Shift Schedule

Shift schedules can be edited by either double clicking on a scheduled item on the calendar or dragging and dropping schedule items from one date to another, or one resource to another. The drag-and-drop feature allows for fast and easy changes in planning or "laying out" your shift schedule.

1. **Change a Shift Date** by dragging and dropping the scheduled shift to a different date.
   Tip: Try this with a shift that has more than one resource to see the shift date change for both resources.
2. **Change a Shift Resource** by dragging a schedule shift from one resource to another.

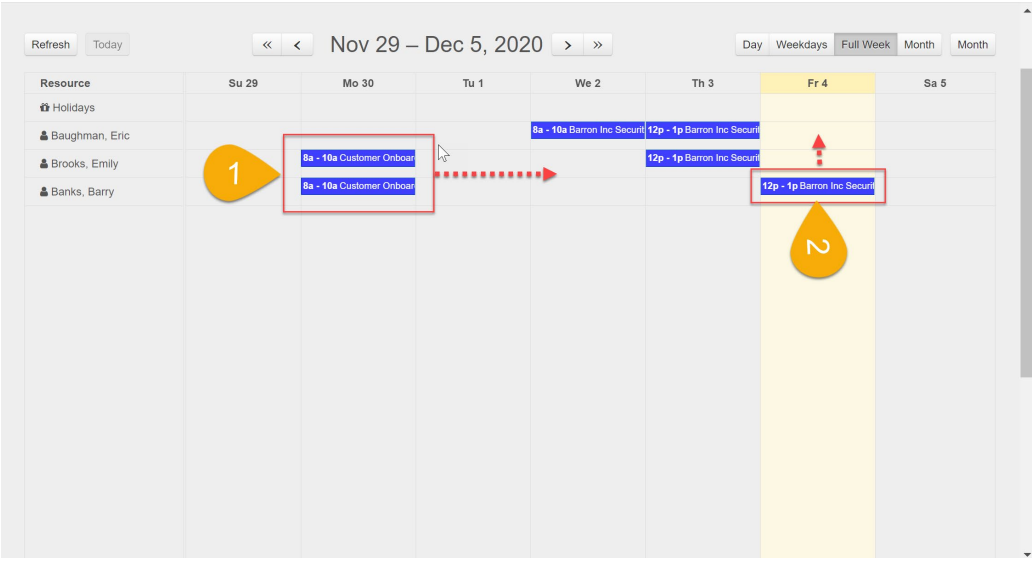


Figure 38 - Edit/Layout Shift Schedule

☐ Time Reports - quick reports for valuable insights into time

ClockIn Reports provide a simple, fast way to see all logged time, or subset of time logged, including tracking hours by Date, Employee, or Project.

- **Note**: The reports will come to life as you have more actual data, or if you enter sample data.

Review the Reports by clicking on the Time Reports link in the checklist or using the left-side navigation under Time, Administration, and then Reporting. From the Reporting page follow the steps below to experience the various views and features for generating and outputting reports.

- **Note:** The reports view defaults to the current week. Therefore, start by reviewing and applying any necessary filters.

☐ Define your Report Criteria

1. **Select an Employee** from the drop-down, or the default "All Employees" to show in the report.
2. **Pick a Group** if you have groups implemented and want to see a subset of employees.
3. **Choose a Date Range** if desired dates are other than the current week.
4. **Apply Filters** to produce the reports based on select criteria.

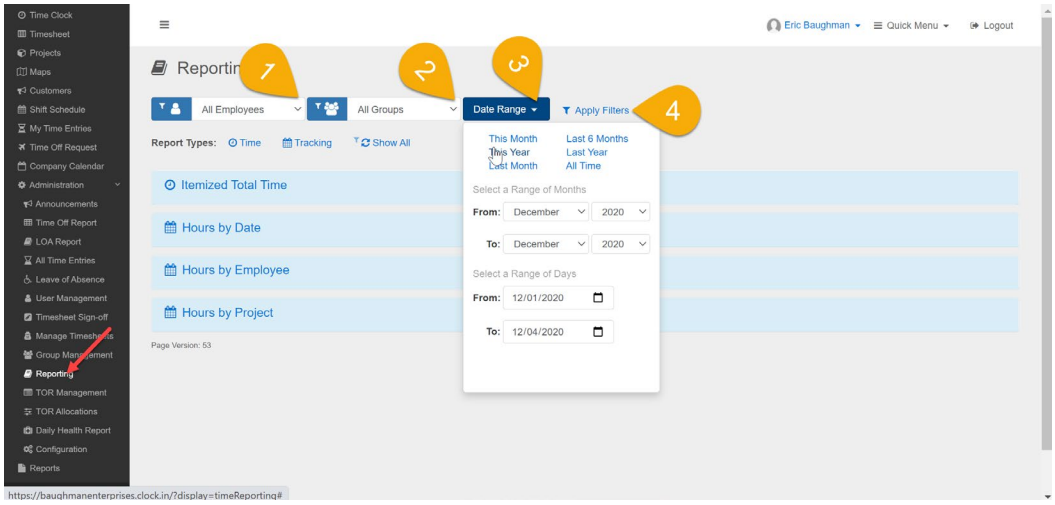


Figure 39 - Report Criteria

☐ View and Work with Reports

5. **Expand Report Detail** by clicking on the reporting heading. Then collapse the detail by clicking the heading again.
6. **Change Sort Order** by clicking on a column heading.
7. **Target Results** using the Search option in the upper right corner of the report detail.
8. **Output Results** using the Export to Excel, Export to PDF, or Print options.

Note: By design, if Search was used to target results then the output data will include only what was returned by the search. Clear the Search if you want all data in the export or print.

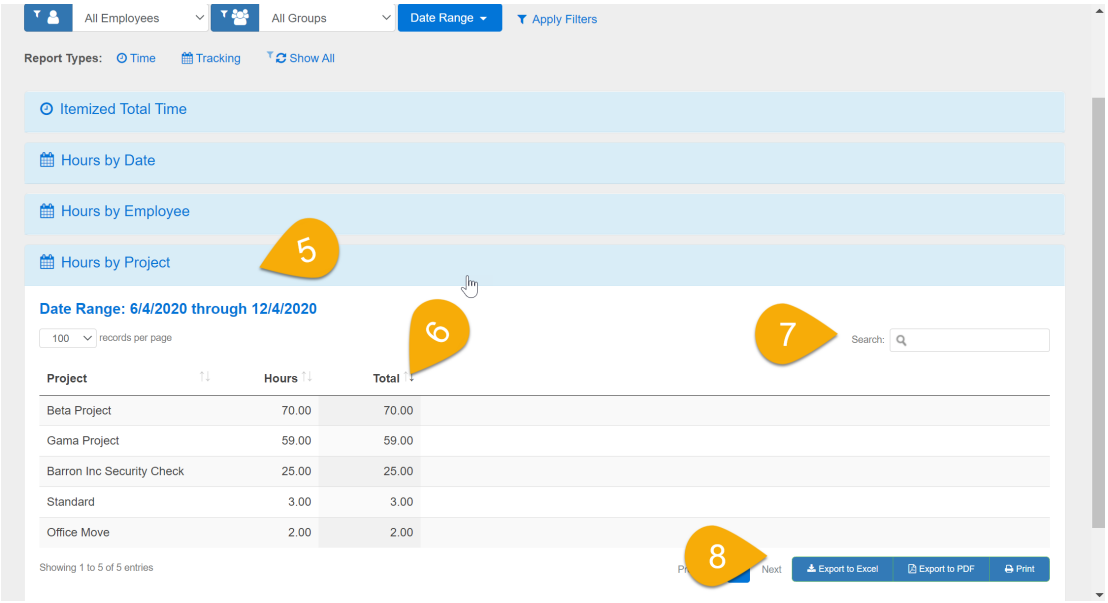


Figure 40 - View and Output Reports